

Getting Started on DesktopShipper ShipV2

shipv2.desktopshipper.com





**DESKTOP
SHIPPER**

**GETTING
STARTED**

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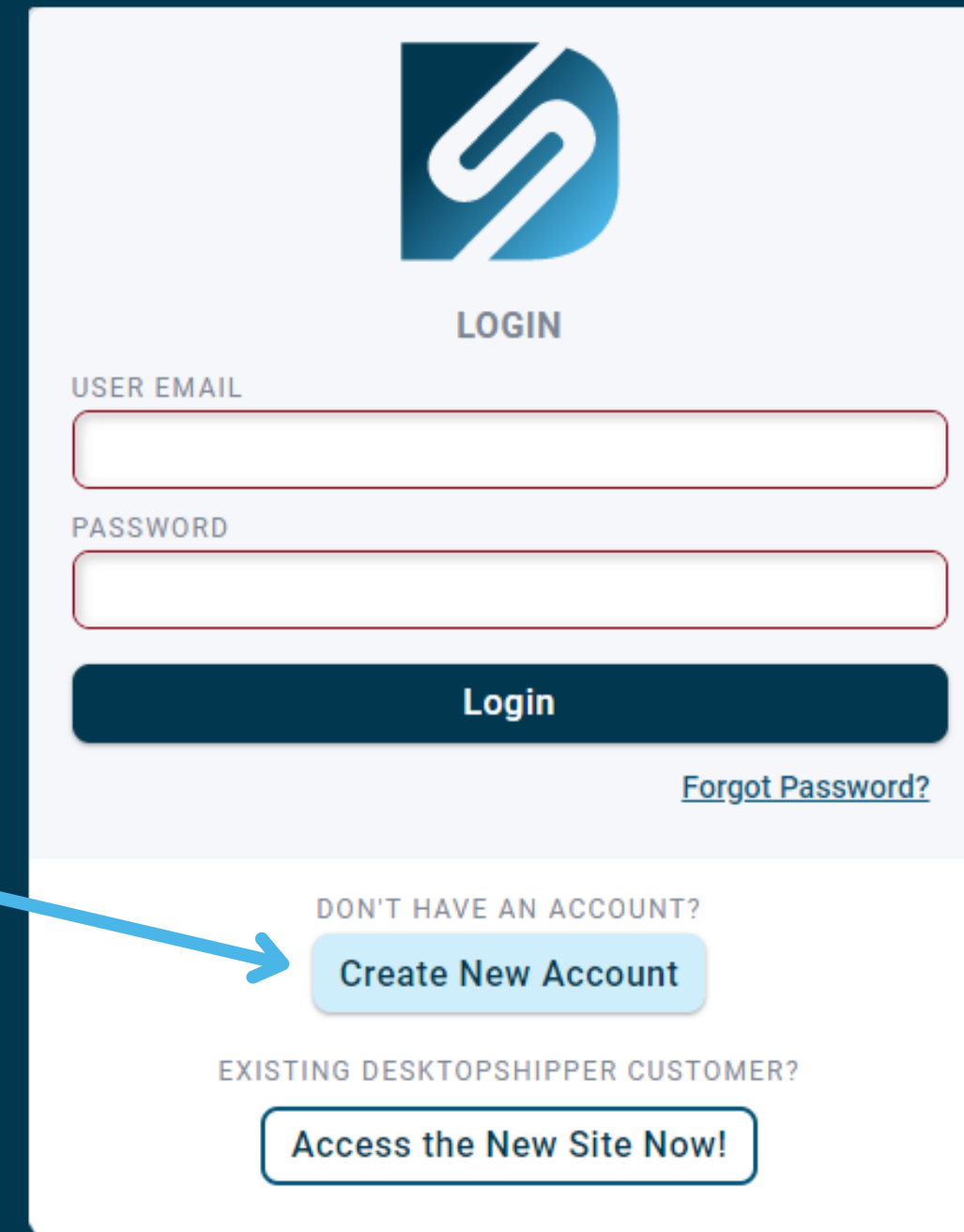
Registering A New DesktopShipper Account


Navigate your web browser to
shipv2.desktopshipper.com

Click the

Create New Account

Button





LOGIN

USER EMAIL

PASSWORD

Login

[Forgot Password?](#)

DON'T HAVE AN ACCOUNT?
Create New Account

EXISTING DESKTOPSHIPPER CUSTOMER?
Access the New Site Now!



DESKTOP SHIPPER

Ship Version 2

Get Started Shipping



Once you have registered your new account for DesktopShipper, building a shipping profile will be your first goal. Profiles control what your orders are allowed to do and what they cannot do such as which carriers can be used and setting up default customs values.

In order to build a profile you will need to complete the following configuration steps within DesktopShipper:

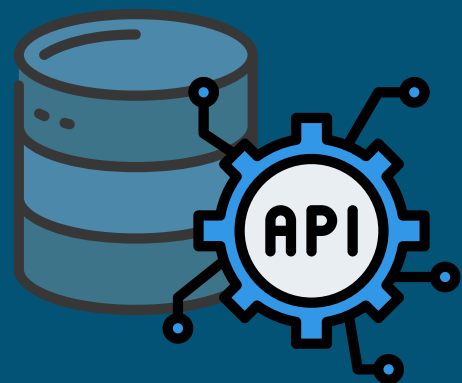


1) Configure your origin address and (optionally) a return address.

2) Add at least one carrier account to your DesktopShipper account.

3) Add an integration from which DesktopShipper will be importing orders. This can be an order host system (ie. Shopify, Netsuite, Magento, etc.) or a marketplace (ie. Amazon, Etsy or eBay).

Note an integration is not required if you are importing orders from a CSV file, or manually entering orders.



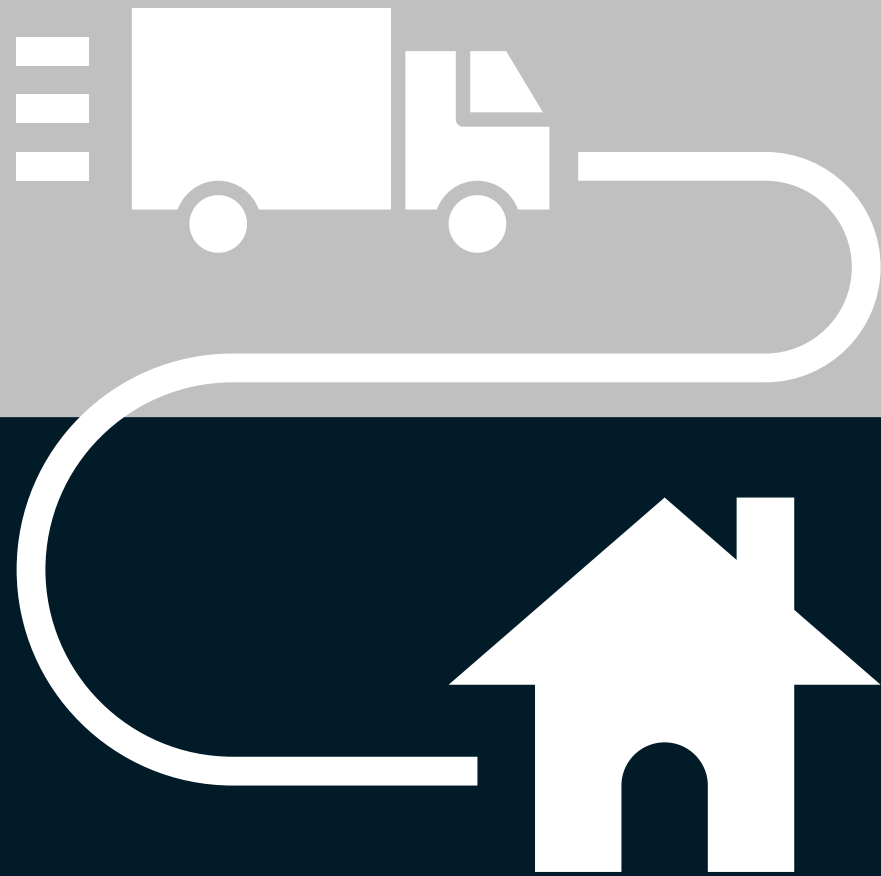
Once the above items have added to your account, it is time to add a profile!

Locations

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Location Types



Origin Address

The location the package ships out from.



Return Address

The location where undeliverable packages are sent back to.



Company Address

The Billing address on file.



What is a Location in regards to DesktopShipper

Locations are used for rating and return purposes. As mentioned, each profile requires an origin address and a return address.

Origin Address

The origin address effects rating. Having it set incorrectly can create inaccurate rates. On specific carriers the origin address must match the address on the account.



Carriers Effected by
Origin Address:

DHL eCommerce

Pitney Bowes (Standard)

OSM Worldwide

Passport

Return Address



The return address is the location that populates (usually) on the upper left portion of the postage label.

Reasons why the return address can be different from the Origin:

- Customer has a different customer facing name and chooses to display it on the return address.
- Customer has a specific warehouse that they want returns to arrive at.
- Customer is fulfilling for multiple clients and wants the return address to reflect their client's facility.

LR	57	PARCEL SELECT U.S. POSTAGE & FEES PAID OSM eVS
PS	V26	
<hr/>		
Meggie's Boutique 3220 SW 1st Ave Suite 100 Portland, OR 97239	Pkg Id: 104076 Weight: 1.00 BOX: 1 OF 1 Zone: 7	

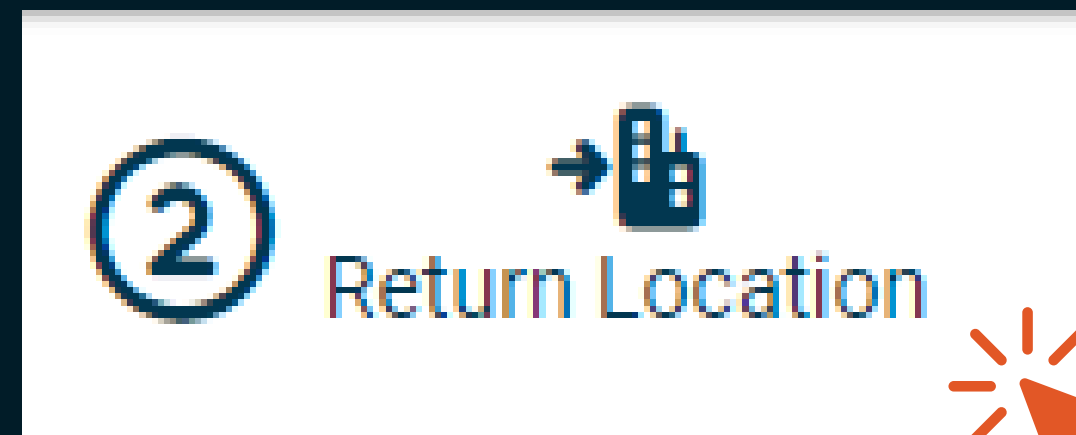
Set Up Wizard: Origins and Return Locations

On the Dashboard page, the first steps to creating a profile will be to add a Origin location and a Return location. An easy method for these steps is to use the "Account Set-up Wizard" located at the top of the DesktopShipper Dashboard page.

Click the "Origin Location" button to configure your company's Origin Address.



Click the "Return Location" button to configure your company's Return Address.



Note: The Return Location and Origin Location can be the same address.

Create a New Location

After navigating to the Locations page, click the *"Create New"* button in the upper right of the page.

Locations
ORIGIN AND RETURN LOCATIONS

Company
COMPANY ADDRESS

DESCRIPTION	COMPANY	ADDRESS	CONTACT
Pongo Pet Supplies	Pongo Pet Supplies	9112 Main St Suite 100 Portland, OR, 97223	503-442-3800 pongo@petcs.com

Origin
ORIGIN ADDRESSES

No records available.

Return
RETURN ADDRESSES

No records available.

[Create New](#)

Creating a New Location

Select the type of location you would like to create.

- Origin
- Return

Enter your company's name

Some carriers require phone numbers

For Return address:
Override the origin zip code with the return address zipcode

Select your company's country

Create Location

LOCATION TYPE
Choose a location type

DESCRIPTION

COMPANY

EMAIL

PHONE

ADDRESS 1

ADDRESS 2

POSTAL CODE

OVERRIDE POSTAL CODE

CITY

COUNTRY
Select a Country

STATE
Select a State

Save Location

The Description is what populates on the drop downs on the profile and carrier accounts. Adding an identifier word is suggested..

Some carriers require email addresses

Enter your company's address

Enter your company's postal code

Enter your company's city

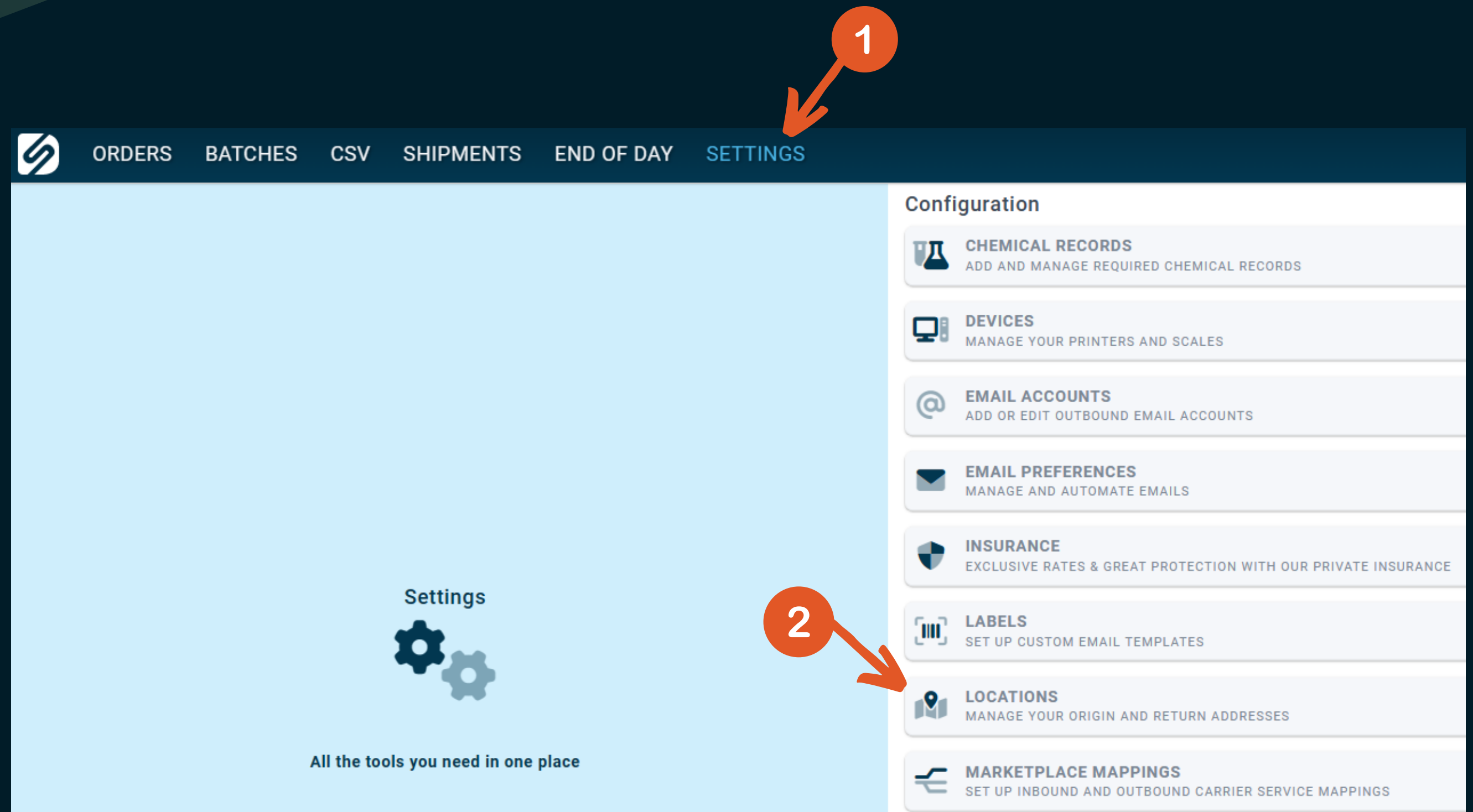
Select your company's state or providence

Click "Save Location" when finished

Navigating to the Locations Page on ShipV2

1) Navigate to the Locations page by clicking Settings.

2) Select the *Locations* option.



The screenshot shows the ShipV2 interface. At the top, a dark blue navigation bar contains the ShipV2 logo and menu items: ORDERS, BATCHES, CSV, SHIPMENTS, END OF DAY, and SETTINGS. An orange arrow with a '1' in a circle points to the SETTINGS menu item. Below the navigation bar, the main content area is light blue and contains a 'Settings' section with a gear icon and the text 'All the tools you need in one place'. On the right side, there is a 'Configuration' sidebar with several options: CHEMICAL RECORDS, DEVICES, EMAIL ACCOUNTS, EMAIL PREFERENCES, INSURANCE, LABELS, LOCATIONS, and MARKETPLACE MAPPINGS. An orange arrow with a '2' in a circle points to the LOCATIONS option in the sidebar.

Editing Locations:

On occasion, you may need to edit a location. If so, follow the steps below:

1) Navigate to the **Locations** page.

2) Choose a Origin or Return location that you wish to modify.

3) Select the location of your choice and click the pencil icon.

4) Make the adjustments to your address.

5) Click "Save Location"

The screenshot displays the 'Locations' page in the Pongo Pet Supplies system. The page header includes navigation links for ORDERS, BATCHES, CSV, SHIPMENTS, END OF DAY, and SETTINGS. The user is logged in as 'Pongo Pet Supplies' with ID 10008506. The 'Locations' section is titled 'ORIGIN AND RETURN LOCATIONS' and features a 'Create New' button. There are two tables: 'Company' (COMPANY ADDRESS) and 'Origin' (ORIGIN ADDRESSES). The 'Origin' table has a pencil icon next to the 'Pongo Pets origin' entry, which is highlighted by an orange arrow. An 'Edit Location' modal form is open, showing fields for LOCATION TYPE (Origin), COMPANY (Pongo Pets), PHONE (5035555555), ADDRESS 1 (9112 Main St.), ADDRESS 2 (Suite 100), POSTAL CODE (97223), CITY (Portland), STATE (Oregon), and COUNTRY (United States). A 'Save Location' button is at the bottom right of the modal, also highlighted by an orange arrow.

DESCRIPTION	COMPANY	ADDRESS	CONTACT
Pongo Pet Supplies	Pongo Pet Supplies	9112 Main St Suite 100 Portland, OR, 97223	503-442-3800 pongo@petcoales@gmail.com

DESCRIPTION	COMPANY	ADDRESS	CONTACT
Pongo Pets origin	Pongo Pets	9112 Main St. Suite 100 Portland, OR, 97223 USase	

Edit Location

LOCATION TYPE: Origin
DESCRIPTION: Pongo Pets origin
COMPANY: Pongo Pets
EMAIL: pongopetssales@pongo.com
PHONE: 5035555555
ADDRESS 1: 9112 Main St.
ADDRESS 2: Suite 100
POSTAL CODE: 97223
CITY: Portland
STATE: Oregon
COUNTRY: United States

Save Location

Carrier Accounts

shipv2.desktopshipper.com





Carrier Accounts and Profiles

Without a carrier account linked to your profile, orders cannot rate therefore cannot ship. Prior to setting up a profile you (or an implementation technician) will need to add at least one carrier account to your *DesktopShipper* cloud account.

Set Up Wizard: Carriers

On the Dashboard page, the next step to creating a profile will be to add a carrier account. An easy method for this step is to use the "Account Set-up Wizard" located at the top of the DesktopShipper Dashboard page.

Click the "**Carriers**" button to add or configure your carrier account(s).



Navigating to the Carrier Accounts Page on ShipV2

1) Navigate to the Locations page by clicking the **Settings** menu.

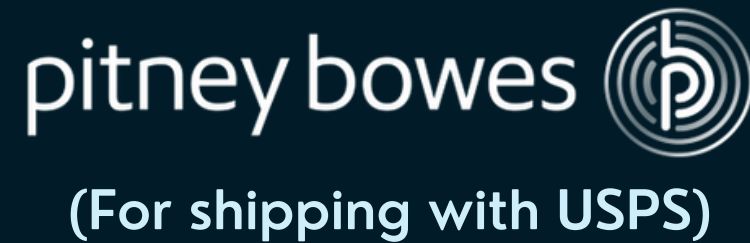
2) Select the **Carrier Accounts** option.

The screenshot shows the ShipV2 interface. At the top, a dark blue navigation bar contains the ShipV2 logo and menu items: ORDERS, BATCHES, CSV, SHIPMENTS, END OF DAY, and SETTINGS. An orange arrow with a '1' in a circle points to the SETTINGS menu item. Below the navigation bar, the main content area is light blue and contains a 'Settings' heading with a gear icon. To the right, a white sidebar lists various settings categories: General (GLOBAL, PROFILES, USERS) and Integrations (API, CARRIER ACCOUNTS, INTEGRATIONS). An orange arrow with a '2' in a circle points to the 'CARRIER ACCOUNTS' option in the Integrations section. The 'CARRIER ACCOUNTS' option includes a truck icon and the text 'SETTINGS (RATES, REFERENCES, TIMES, 3RD PARTY, ETC.) FOR ALL YOUR CARRIERS'.

Adding a Simple Carrier Account to DesktopShipper

In DesktopShipper, there are two levels of carrier accounts. First are carriers that are easy to configure and can be set up by a customer easily with little to no assistance from a DesktopShipper technician. These carriers include the following:

Please click on the below logos to load our configuration knowledge base for the respective carrier



UPS Mail Innovations®



ASENDIA
BY LA POSTE & SWISS POST

For further assistance, please contact our support team.

Adding Other Carrier Accounts to DesktopShipper

Many of our other supported carrier accounts may require assistance from our implementation team and may be subject to a set up fee (which will be quoted to you by our sales team). The following is a sample list of carriers that might require an implementation tech.



For assistance with these or additional carriers, please contact our support team:

503.331.4000

support@desktopshipper.com

www.desktopshipper.com/support

Integrations

shipv2.desktopshipper.com





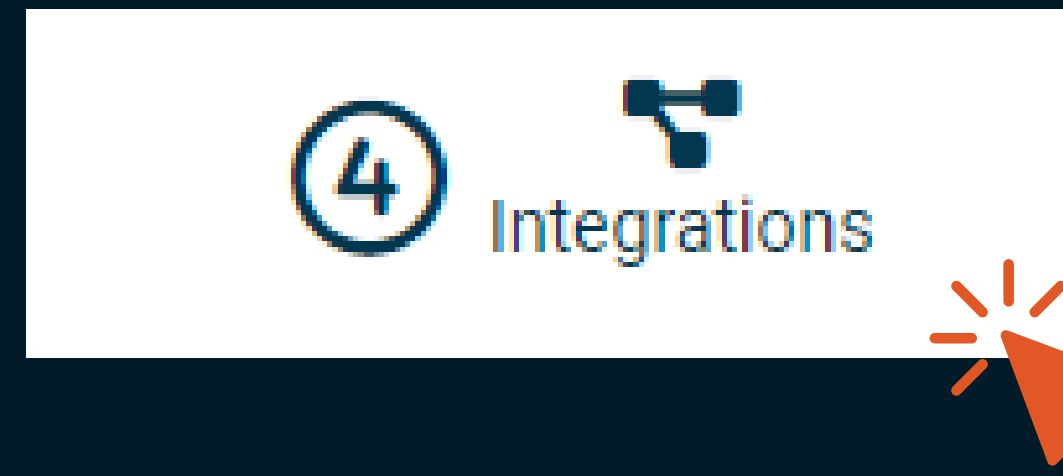
Order Integrations and Profiles

If you are using an order integration that *DesktopShipper* imports your orders from, you can configure your profile(s) to automatically assign the imported orders to that profile, instead of having to manually assigning a profile to orders. One of the earliest steps to get shipping is to set up at least one integration account. If you are shipping orders imported from a CSV file or manually entering orders, you can skip the integration portion.

Set Up Wizard: Integrations

On the Dashboard page, the next step to creating a profile will be to add an integration. An easy method for this step is to use the "Account Set-up Wizard" located at the top of the DesktopShipper Dashboard page.

Click the "**Integrations**" button to add or configure your integration account(s).



Navigating to the Integrations Page

1) Navigate to the Locations page by clicking the **Settings Menu**...

2) Select the **Integrations** option.

The screenshot displays a software interface with a dark blue header containing navigation links: ORDERS, BATCHES, CSV, SHIPMENTS, END OF DAY, and SETTINGS. The SETTINGS link is highlighted in blue and has a red circle with the number '1' and an arrow pointing to it. Below the header is a light blue sidebar with a 'Settings' label and a gear icon. The main content area is white and contains a 'General' section with options: GLOBAL (SETTINGS TIED TO YOUR ENTIRE ACCOUNT), PROFILES (DEFINE AND AUTOMATE BUSINESS RULES), and USERS (CREATE MULTIPLE USERS WITH DEFINED ROLES, PERMISSIONS, AND PREFERENCES). Below this is an 'Integrations' section with options: API (MANAGE TOKENS AND PERMISSIONS), CARRIER ACCOUNTS (SETTINGS (RATES, REFERENCES, TIMES, 3RD PARTY, ETC.) FOR ALL YOUR CARRIERS), and INTEGRATIONS (ADD AND CONFIGURE YOUR MARKETPLACES). The INTEGRATIONS option is highlighted in blue and has a red circle with the number '2' and an arrow pointing to it.

Adding a Integration to DesktopShipper

The following is a sample list of integrations supported by DesktopShipper. Some integrations are easy to set up and many require assistance from an implementation technician.



For assistance with adding an integration, please contact our support team:

503.331.4000

support@desktopshipper.com

www.desktopshipper.com/support



Profiles

shipv2.desktopshipper.com





Profiles

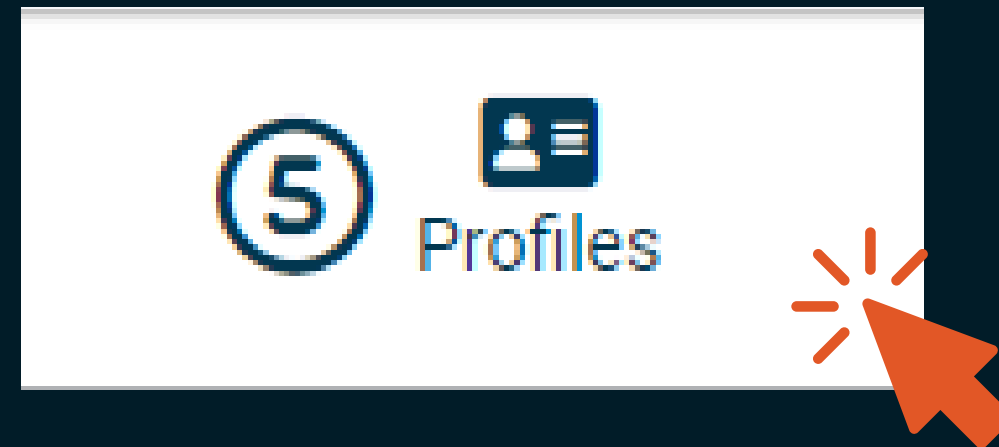
This section covers the all the needed steps for creating a profile for shipping orders with



Set Up Wizard: Profiles

On the Dashboard page, the next step to creating a profile will be to add a Profile. An easy method for this step is to use the "Account Set-up Wizard" located at the top of the DesktopShipper Dashboard page.

Click the "**Profiles**" button to add or configure a carrier Profile.

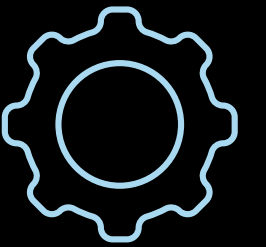


Profiles

Profiles are used to assign a set of variables to an order controlling what orders can and cannot do.

You can control the following through the profile:

- Origin and Return Address
- Integration link
- Carrier accounts the order can rate for
- Default customs settings
- Markups / Markdowns
- References on the order
- Packing Slips (Assigned through Packing Slip Settings)
- Carrier Mappings (a variable in the carrier mapping settings)



Profiles SHIPPING PROFILES Add New Profile

Beth Profile
Cody Profile
Corey
Diyaami Profile
Donna Profile
Erik Profile
Griffin
Jack Test
Jackie Test
JanaeTraining
jRaymond test
Justin
katie14
Line of Ref 2
Logan Prof 1
Megan
MEGAN DSOM
MEGAN VSB
Meggie's

Profile NAME
NAME OF PROFILE Save

Locations
SELECT OR CREATE ORIGIN AND RETURN LOCATIONS TO BE USED FOR ORDERS ATTACHED TO THIS PROFILE

ORIGIN **RETURN**

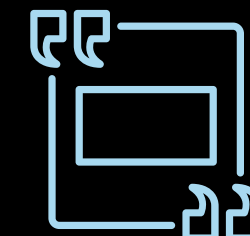
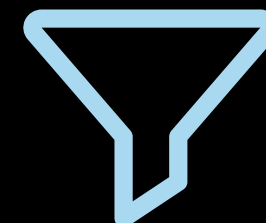
Meggie's Boutique
3220 SW 1st Ave Suite 100
Portland, OR 97239
US
5033314000
support@desktopshipper.com

Meggie's Boutique
3220 SW 1st Ave Suite 100
Portland, OR 97239
US
5033314000
megan@desktopshipper.com

Use Ship From address as Return address

Linked Integrations
SELECT WHICH MARKETPLACE(S) AND THEIR ORDERS ARE ATTACHED TO THIS PROFILE AND SETTINGS

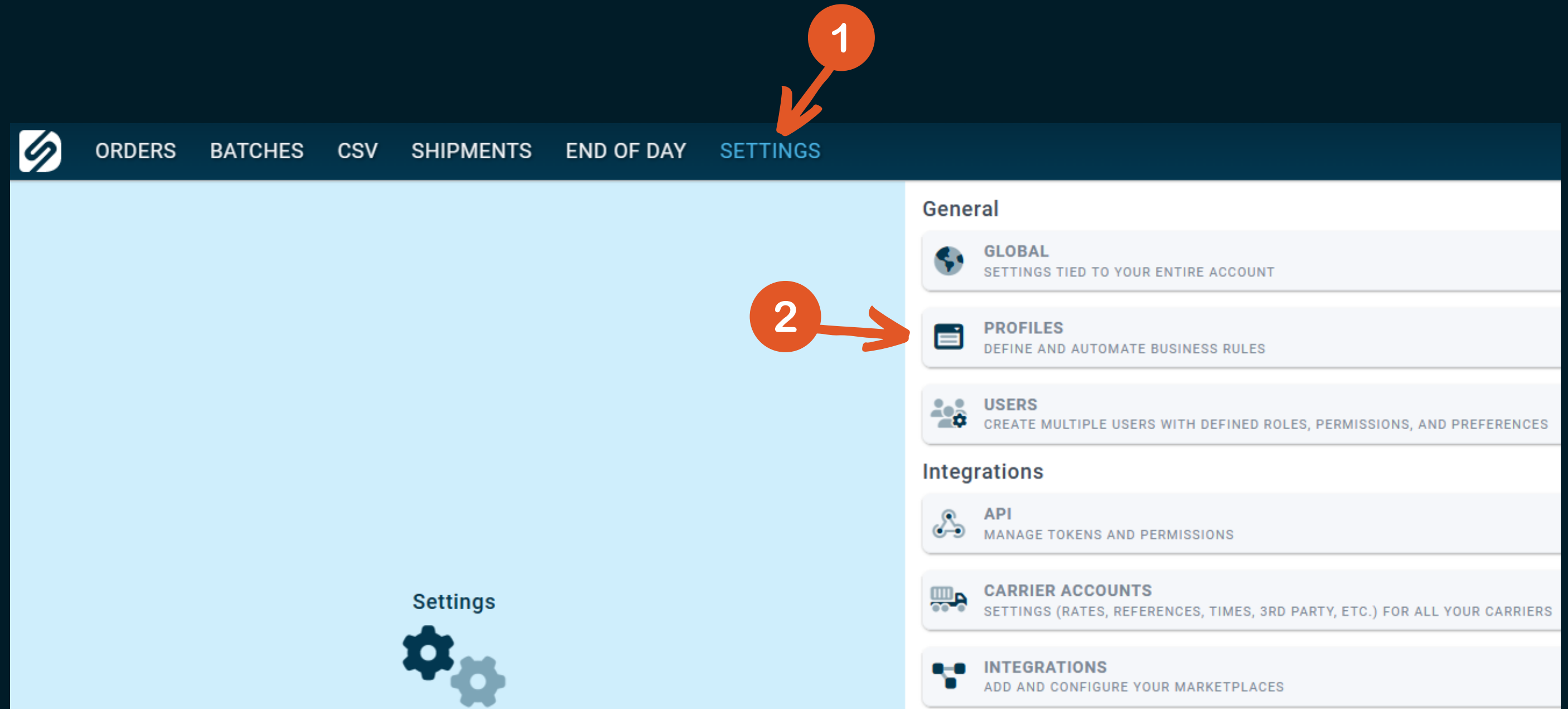
MARKETPLACE	ACCOUNT NAME	FILTERS
<input type="checkbox"/> BigCommerce	DS BigCommerce	
<input type="checkbox"/> CSV Import	CSV Automation	
<input type="checkbox"/> Manually Created Orders	Manual Orders	



Creating a New Profile

1) Navigate to the Locations page by clicking the **Settings Menu**...

2) Select the **Profiles** option.



Creating a New Profile

Use the following steps to create your new profile:

Enter a unique name for your new profile



Profile
NAME OF PROFILE

NAME
Profile Name

Locations



ORIGIN

[Dropdown menu]

[Text area]

The Origin location's purpose is the address the order will ship from. It is important to set the Origin address correctly in the profile settings otherwise rating for some carriers might not occur.



RETURN

[Dropdown menu]

[Text area]

Use the "Return" dropdown to select the location to where the packages will need to be sent to if cannot be delivered.

When enabled, the return address will be pulled from the data received from the integration



Use Ship From address as Return address

Add Location

When creating new profiles or for existing profiles, if needed, you can create a new location.

Click the **Add Location** button to open the "Add location" window.

1) Select one of the following Location Types:

- Company
- Origin
- Return

2) Fill in all the fields that are needed.

3) Click **Save Location** when finished.

Add Location ×

LOCATION TYPE <input type="text" value="Choose a location type"/>	DESCRIPTION <input type="text"/>
COMPANY <input type="text"/>	EMAIL <input type="text"/>
PHONE <input type="text"/>	ADDRESS 1 <input type="text"/>
ADDRESS 2 <input type="text"/>	POSTAL CODE <input type="text"/>
OVERRIDE POSTAL CODE <input type="text"/>	CITY <input type="text"/>
COUNTRY <input type="text" value="Select a Country"/>	STATE <input type="text" value="Select a State"/>

Save Location







Linked Integrations

The integration section of the profile controls which orders are attached to the profile.

- You can have multiple integrations attached to a profile.
- You can only attach an integration to 1 profile **UNLESS** you further break down that profile using the Additional Profile Integration Filters.

Select each integration that needed for the new profile.

Note: Manual orders and CSV Import are will automatically be enabled whether the box is checked or not.

MARKETPLACE	ACCOUNT NAME	FILTERS
<input type="checkbox"/>	 Odbc Integration	CASSIO ODBC
<input type="checkbox"/>	 Odbc Integration	Coreys Test Server
<input type="checkbox"/>	 Odbc Integration	Meg's Database
<input type="checkbox"/>	 Odbc Integration	Roberts ODBC
<input checked="" type="checkbox"/>	 Public Api	Public API Advanced
<input checked="" type="checkbox"/>	 Shopify	DS Shop Advanced

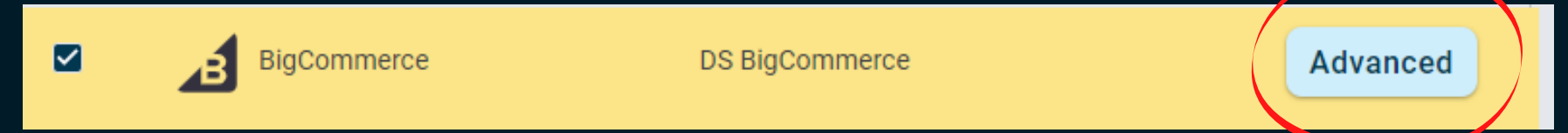
Duplicate Integrations

Linked integrations can only be enabled once, if the integration settings on the profile is set to assign all imported orders to this profile. Enabling the same integration on multiple profiles will cause a conflict unless the *"Advanced Settings"* are utilized to specify values that will trigger the software to select an associated profile.

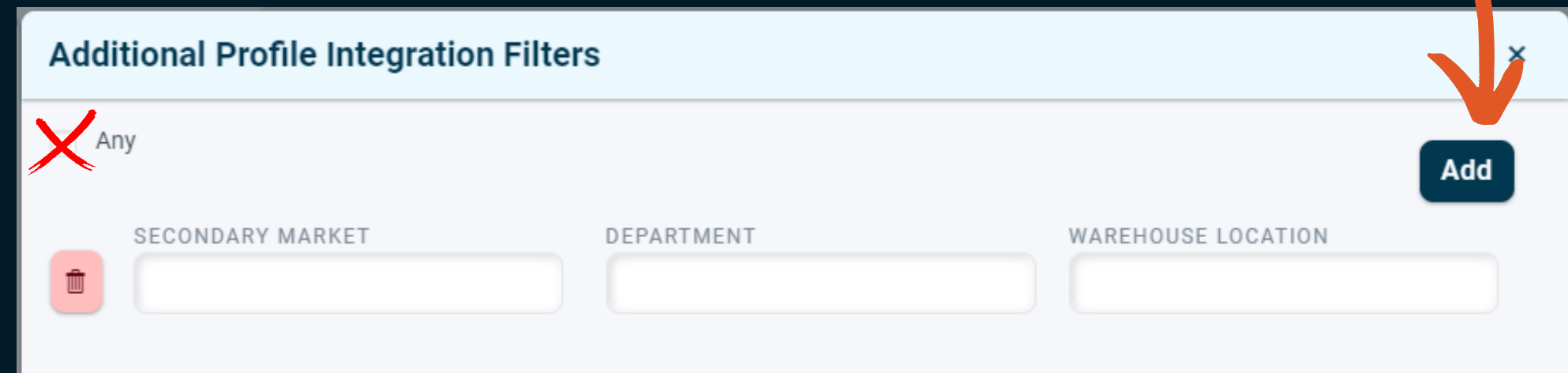
Click the *"Advanced"* button that appears to the right of the conflicting integration account name (highlighted in yellow) when the integration is enabled.

Linked Integrations
SELECT WHICH MARKETPLACE(S) AND THEIR ORDERS ARE ATTACHED TO THIS PROFILE AND SETTINGS
Duplicate mappings are not allowed. Please fix the highlighted rows.

	MARKETPLACE	ACCOUNT NAME	FILTERS
<input checked="" type="checkbox"/>	BigCommerce	DS BigCommerce	Advanced
<input checked="" type="checkbox"/>	CSV Import	CSV Automation	Advanced
<input type="checkbox"/>	Manually Created Orders	Manual Orders	
<input type="checkbox"/>	Odbc Integration	CASSIO ODBC	
<input checked="" type="checkbox"/>	Odbc Integration	Coreys Test Server	Advanced
<input type="checkbox"/>	Odbc Integration	Meg's Database	



In the Advanced windows, uncheck "any" and click "Add" to add an option that will differentiate this integration from another profile's same integration.



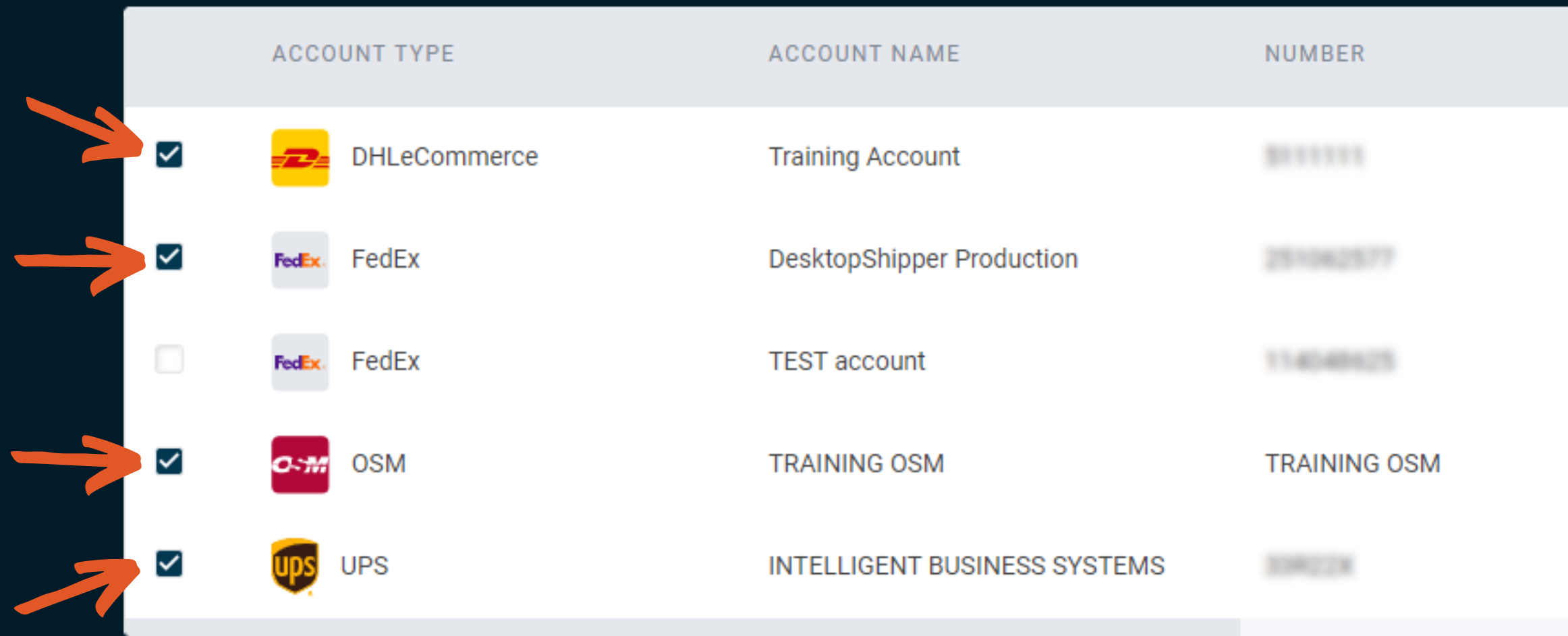
You can add a value for :
Secondary Market
Department
Warehouse Location






Carrier Accounts

The Carrier Accounts section of the profile is critical. If an account is not enabled on the profile, you won't be able to obtain any rates for any carrier service.

This section is heavily utilized by customers that are fulfillment warehouses whom often have different accounts per client they ship for. Please verify which account belongs to which profile.

Select each carrier account needed for the new profile.

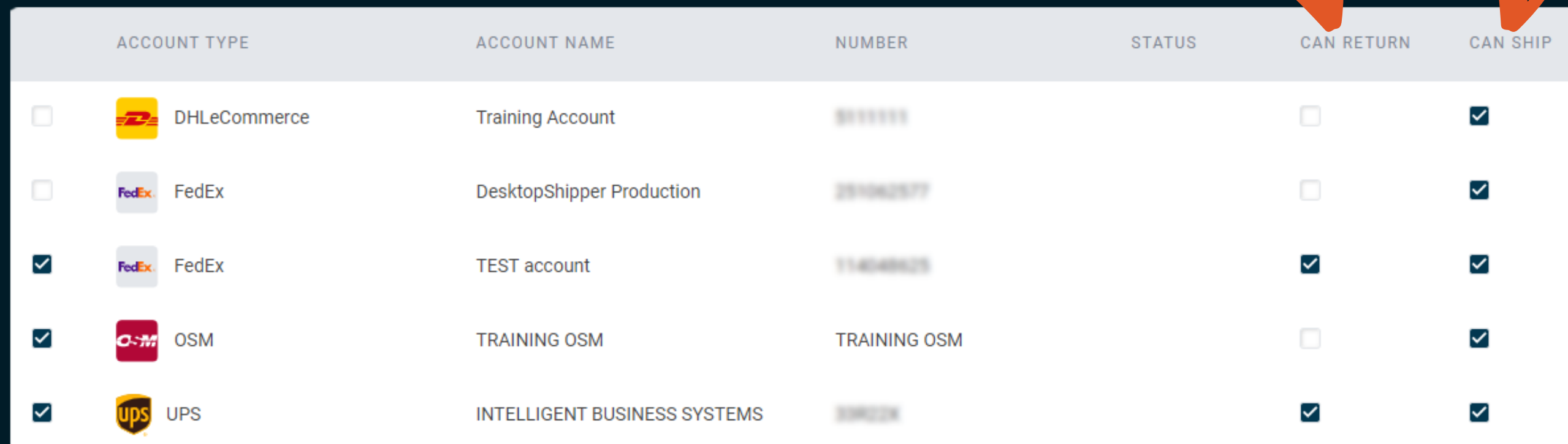







	ACCOUNT TYPE	ACCOUNT NAME	NUMBER
<input checked="" type="checkbox"/>	 DHLCommerce	Training Account	0011111
<input checked="" type="checkbox"/>	 FedEx	DesktopShipper Production	201042577
<input type="checkbox"/>	 FedEx	TEST account	11404425
<input checked="" type="checkbox"/>	 OSM	TRAINING OSM	TRAINING OSM
<input checked="" type="checkbox"/>	 UPS	INTELLIGENT BUSINESS SYSTEMS	000000

Carrier Accounts (continued)

Each carrier account for the profile has 2 settings:

- Can Return - Allows the enabled carrier account to be able to produce return labels for that selected carrier, if the carrier supports return labels.
- Can Ship - Allows the enabled carrier account to be able to produce postage labels for that selected carrier. This setting is defaulted to enabled.




	ACCOUNT TYPE	ACCOUNT NAME	NUMBER	STATUS	CAN RETURN	CAN SHIP
<input type="checkbox"/>	 DHLCommerce	Training Account	8111111		<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	 FedEx	DesktopShipper Production	251042577		<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	 FedEx	TEST account	11404025		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	 OSM	TRAINING OSM	TRAINING OSM		<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	 UPS	INTELLIGENT BUSINESS SYSTEMS	810000		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Advanced Profile Options

Below is a list of Advanced Options that will be explained in greater detail in the upcoming pages. To access these settings, click the "Advanced Options" bar to expand the section.



 **Add Additional Shipping Costs**

 **Customs Lines**

 **Reference Fields**

 **Customs Headers**

 **Advanced Settings**

Add Additional Shipping Cost

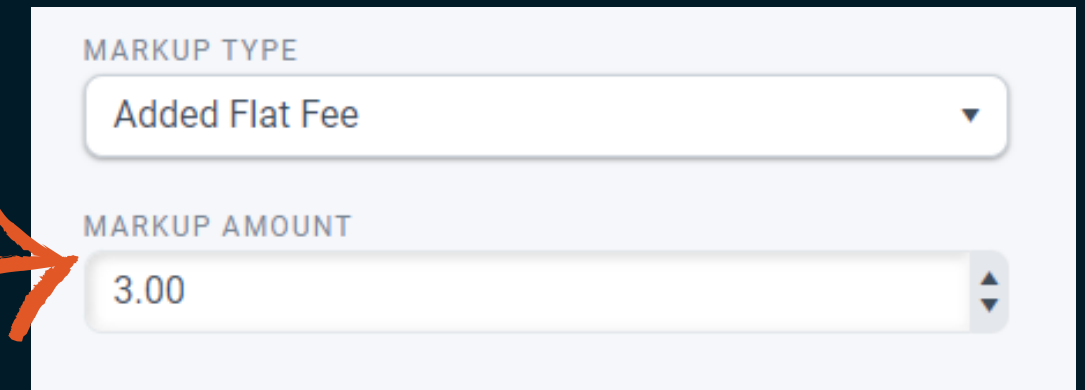
Profile "Additional Shipping Costs" a.k.a "Markups" allow you to add on or subtract charges or discounts to the shipping charge.

Set the Markup Type to "Added Flat Fee" to enter a non-calculated fee to the final carrier charge.

Set the Markup Type to "Added Percentage" to enter a percentage of the final carrier charge that will be added to the final charge.

The Advanced Markup feature will allow additional options to the markup. See the next slide for more details.

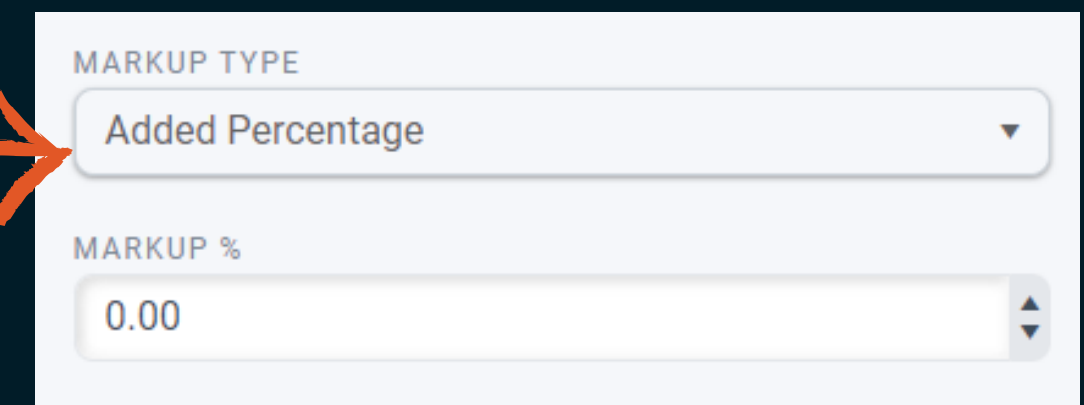
Please Note: modifications to the carrier charge made by a mark up/down setting will not appear in the rating window and will only be applied to the final charge upon updating an integration. The markup/markdown will be included in the total charge displayed on the orders page, and not the Shipments page.



MARKUP TYPE
Added Flat Fee

MARKUP AMOUNT
3.00

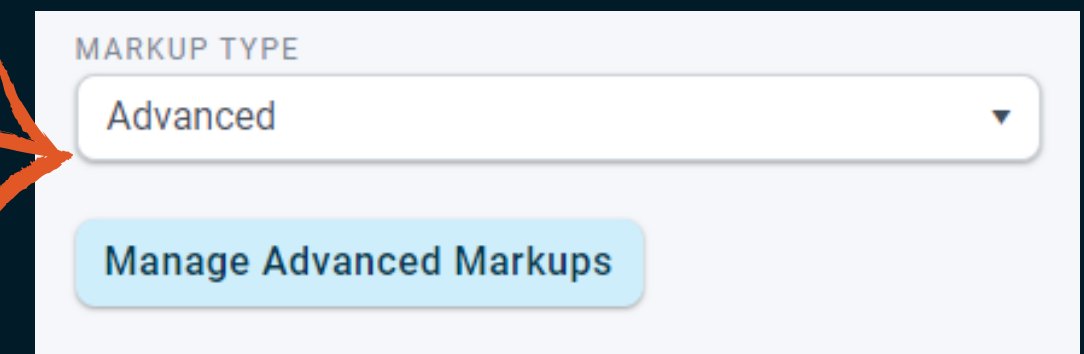
Detailed description: This screenshot shows a configuration window for a markup. At the top, it says 'MARKUP TYPE' and has a dropdown menu with 'Added Flat Fee' selected. Below that, it says 'MARKUP AMOUNT' and has a text input field containing '3.00'. An orange arrow points from the text 'Set the Markup Type to "Added Flat Fee"' to the dropdown menu.



MARKUP TYPE
Added Percentage

MARKUP %
0.00

Detailed description: This screenshot shows a configuration window for a markup. At the top, it says 'MARKUP TYPE' and has a dropdown menu with 'Added Percentage' selected. Below that, it says 'MARKUP %' and has a text input field containing '0.00'. An orange arrow points from the text 'Set the Markup Type to "Added Percentage"' to the dropdown menu.



MARKUP TYPE
Advanced

Manage Advanced Markups

Detailed description: This screenshot shows a configuration window for a markup. At the top, it says 'MARKUP TYPE' and has a dropdown menu with 'Advanced' selected. Below the dropdown is a button labeled 'Manage Advanced Markups'. An orange arrow points from the text 'The Advanced Markup feature will allow additional options to the markup.' to the dropdown menu.

Profile Markup - Advanced



Click

Manage Advanced Markups

to open the Advanced Markup Mappings window

Production Shipping Advanced Markup Mappings

Add New Markup

	MARKUP TYPE	MARKUP VALUE	RATE TYPE	CARRI
 	Percentage of Amount Added	\$0.00	Apply to Negotiated Rate	

1 - 1 of 1 items

Click

Add New Markup

to create an additional
markup or markdown rule

Profile Markup - Advanced

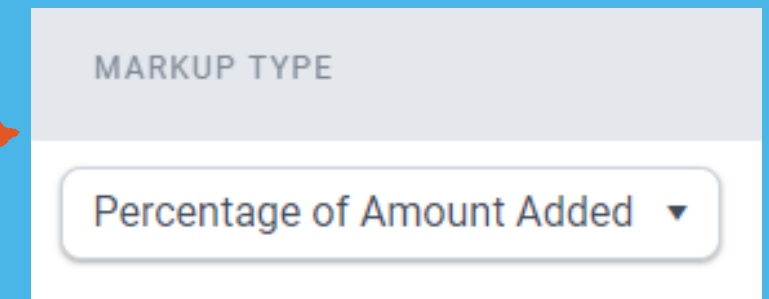
(continued)

To edit the fields in the new (or existing Markup) click the  button.

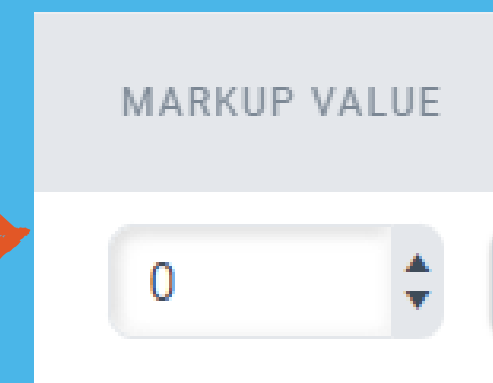
Set the **Markup Type** which can be one of the following options:

- **Percentage of Amount Added** - Adds % of your choice to the cost writeback
- **Flat Amount Added** - Adds a flat fee of your choice to the cost writeback
- **Set Amount** - Writes back a set cost regardless of ship cost.
- **Discounted Percentage** - Removes percentage of your choice in the ship cost that's written back.
- **Discounted Flat Amount Subtracted** - Removes flat fee of your choice from ship cost that's written back

Set the **Markup (Markdown) Value** which can be either a dollar amount or a percentage.



A screenshot of a dropdown menu titled "MARKUP TYPE". The menu is open, showing the selected option "Percentage of Amount Added" with a downward-pointing arrow on the right side. An orange arrow points from the text "Set the Markup Type" to this dropdown menu.



A screenshot of an input field titled "MARKUP VALUE". The field contains the number "0" and has a small up/down arrow icon on the right side. An orange arrow points from the text "Set the Markup (Markdown) Value" to this input field.

Profile Markup - Advanced

(continued)

Rate Type

Set the **Rate Type** which can be either Negotiated or Published rates. Mainly used for UPS or Fedex.

RATE TYPE

Apply to Negotiated Rates ▼

Carrier

Set which **Carrier** you want to add the markup or markdown to.

CARRIER

Carrier Code

Set which **Carrier Code** you want to add the markup or markdown to.

CARRIER CODE

Carrier Account

Set which **Carrier Account** you want to add the markup or markdown to.

CARRIER ACCOUNT

USPS Zone

Modify the **USPS Zone** setting if you wish to apply the markup to zones equal to, higher than and/or lower than a specific postal zone.

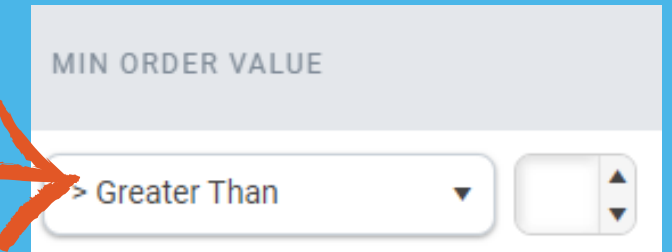
USPS ZONE

Profile Markup - Advanced

(continued)

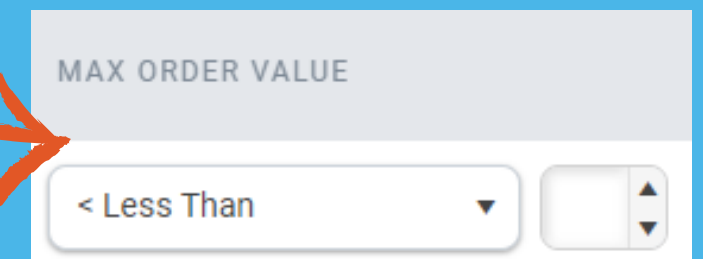
Minimum Order Value

The markup will only be applied if the value of the order is "Greater Than" or "Greater Than or Equal To" a specified value.



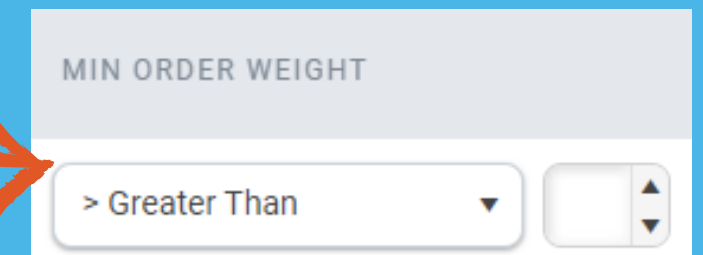
Maximum Order Value

The markup will only be applied if the value of the order is "Less Than" or "less Than or Equal To" a specified value.



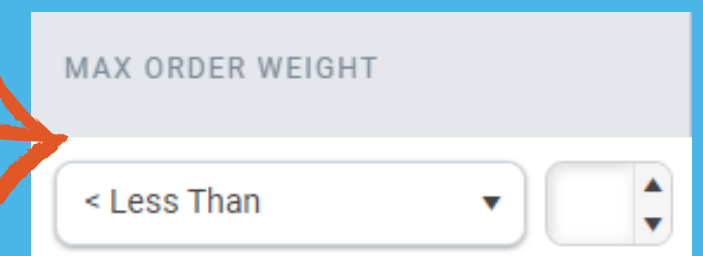
Minimum Order Weight

The markup will only be applied if the weight of the order is "Greater Than" or "Greater Than or Equal To" a specified weight (in pounds).



Maximum Order Weight

The markup will only be applied if the value of the order is "Less Than" or "less Than or Equal To" a specified weight (in pounds).



Reference Fields

The reference fields in the profile settings will automatically apply the values of the selected variable to the order reference fields in the shipping window. When an order is shipped, these reference fields will pass data to the shipment listed on the Shipments page and add data to carrier labels (when applicable) and/or packing slips.

REFERENCE 1
Marketplace

REFERENCE 2
Market Order ID

REFERENCE 3
Multi / SKU & Qty

Profile Page

Package 1 of 1

REFERENCES

LENGTH (IN) WIDTH (IN) HEIGHT (IN)

3.00 5.00 3.00

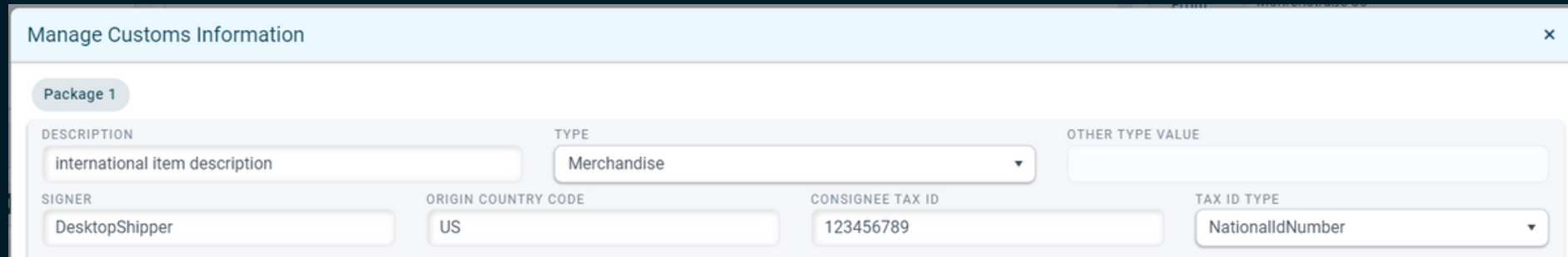
Orders Page

Note: Profile reference fields will only work with certain carriers and carrier services whose labels are generated internally and not through a carrier's API.

Reference Variable Options

- Marketplace - the market that the order was imported from.
- Market Order ID - the market place's order ID.
- DesktopShipper Order ID - the scanned in order number used in DSX to import the order info.
- Service Endorsement - the endorsement used by USPS.
- Custom ID - an order ID generated by a integration.
- Reference ID - an order ID generated by a integration.
- Multi / Sku & Qty - used for orders that have multiple SKUs.
- All Sku & Qty - adds the SKU and quantity for orders with one SKU
- Department - often used by fulfillment centers to list the department or their client.

Default Customs Header Values



Manage Customs Information

Package 1

DESCRIPTION: international item description

TYPE: Merchandise

OTHER TYPE VALUE:

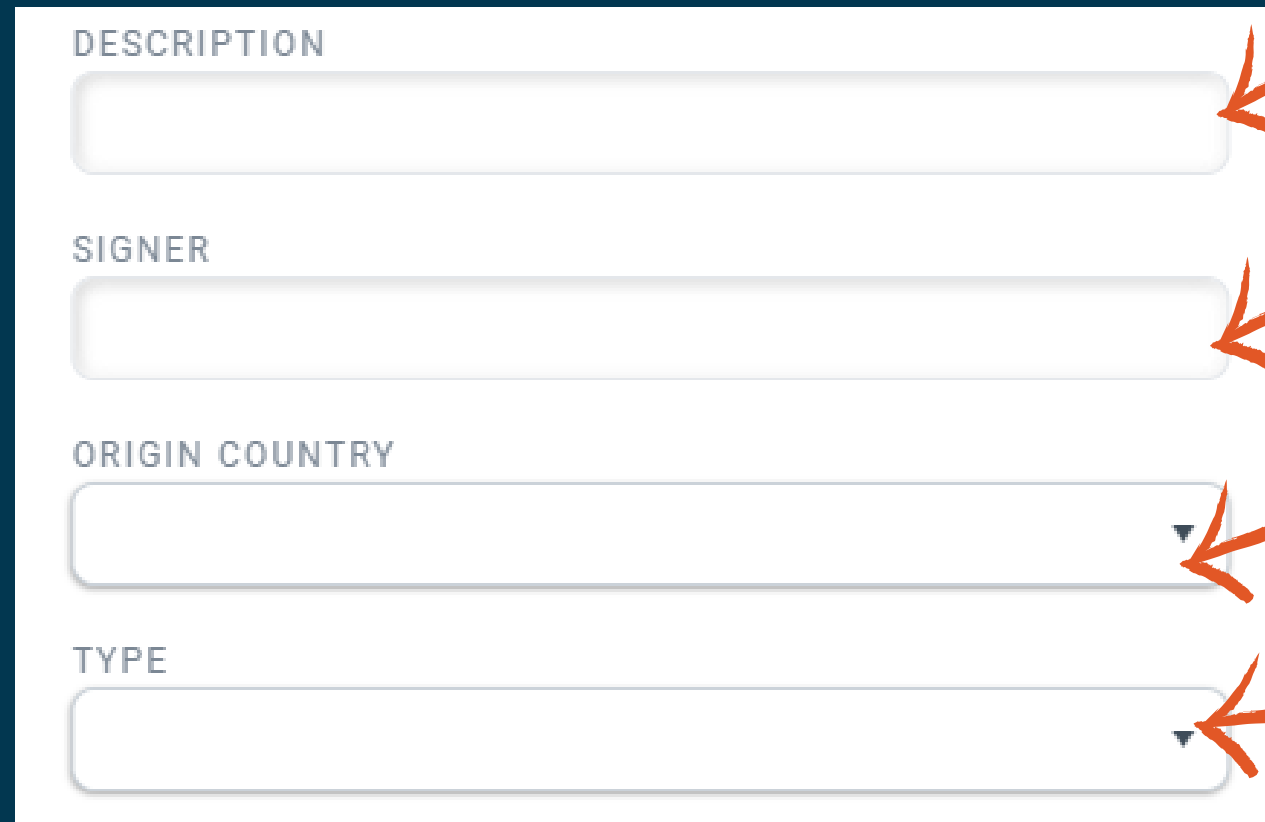
SIGNER: DesktopShipper

ORIGIN COUNTRY CODE: US

CONSIGNEE TAX ID: 123456789

TAX ID TYPE: NationalIdNumber

If filled out it will auto populate the customs headers on orders that require customs



DESCRIPTION

SIGNER

ORIGIN COUNTRY

TYPE

Description - a general category of the products you are shipping.

Signer - enter the name to appear on the signature line on a international CN22 label.

Origin Country - select the general country your products we manufactured in.

Type:

- Merchandise
- Donation
- Sample
- Dangerous Goods
- Documents
- Gift
- Other

Default Customs Line Item Info

SKU	DESCRIPTION	HSCODE	ORIGIN	WEIGHT	VALUE	QTY
test sku 27	Default Description	2112.01	US	0.01	\$10.01	1

If populated and enabled it will fill in customs line item fields. Useful feature if the host system doesn't pass one of the required custom fields

this setting on will replace all customs info values with the below field values.

Override Default Customs Lines

ITEM DESCRIPTION

HS CODE

ORIGIN COUNTRY

WEIGHT (LB)

VALUE

Item Description - the default title of a product

HS Code - default Harmonized System code.

Origin Country - select the general country your products we manufactured in.

Weight - default item weight in pounds.

Useful if you need a standard weight for all products or if your integration does not provide item weights.

Value - default price of your products.

Useful if you need a standard price for all products or if your integration does not provide item prices.

Advanced Settings

The "Is Reseller" setting is a visual indicator that the carrier account the profile uses belongs to a reseller.

Is Reseller

The "Override Return Service Group" setting is used for generating automatic return labels. Enter the mapping value into the field that triggers the return label. If an order with that mapping value imports from one of the integrations set in the profile, DesktopShipper will search the "Marketplace Return Service Inbound Mappings" for the desired market return method. If found in the list of mappings, it will use this mapping to automatically generate and print a return label for the order.

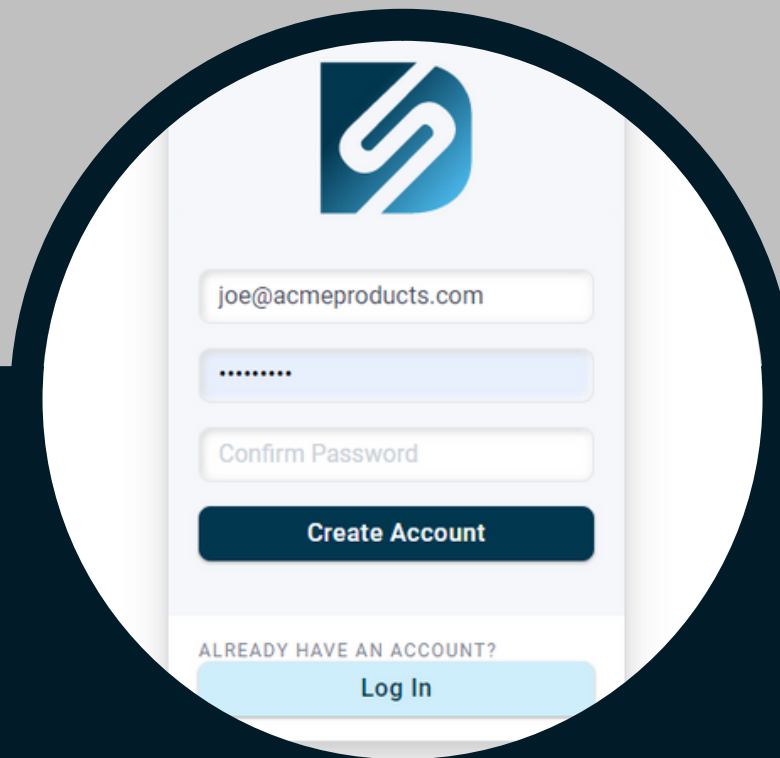
OVERRIDE RETURN SERVICE GROUP

Setting Up a Printer

shipv2.desktopshipper.com



Requirements



**Active
DesktopShipper
account**

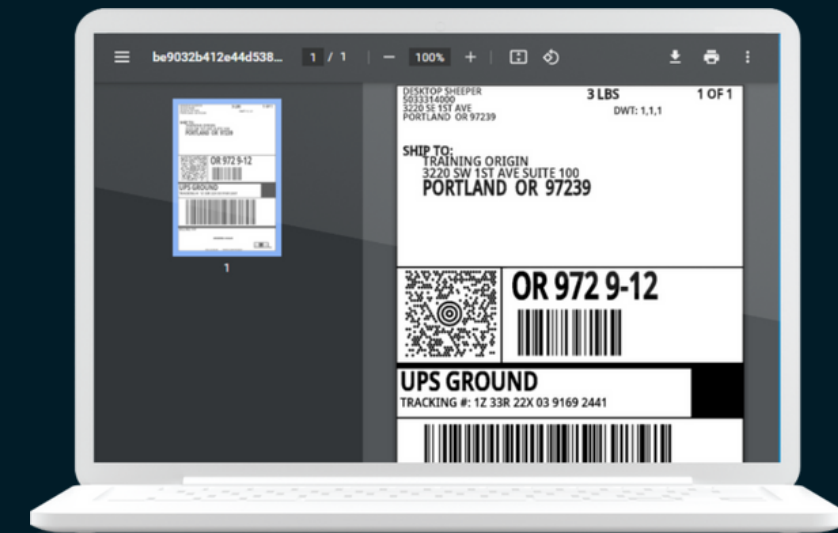


**Installed
Label
Printer**

Printing Shipping Labels in DesktopShipper

When shipping with DesktopShipper from a web browser, be it "1 on 1" or from a batch, there are 2 label printing methods available:.

Generate the labels and print from the web browser window



OR

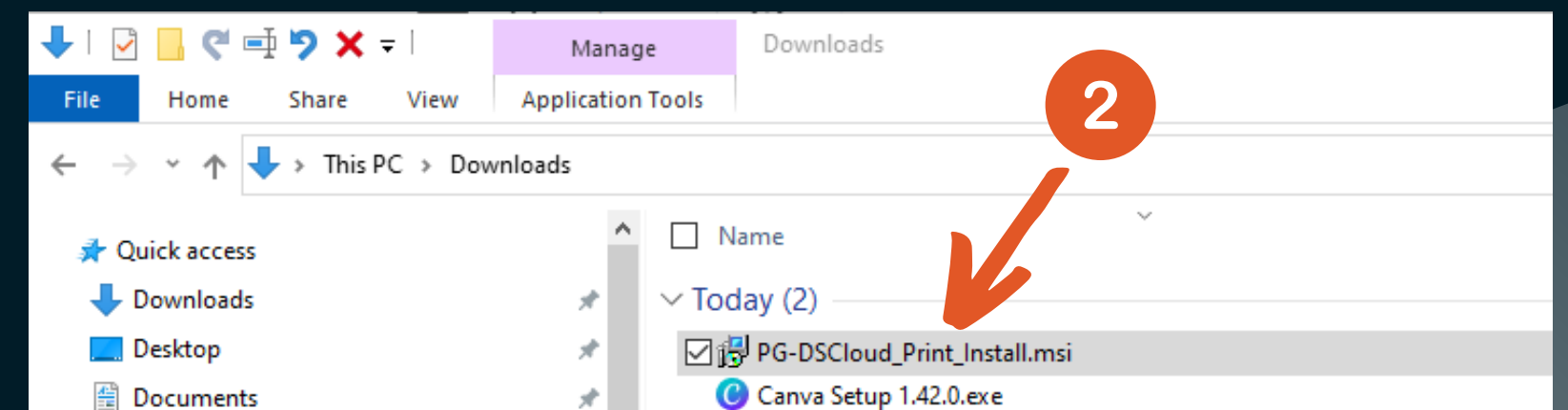
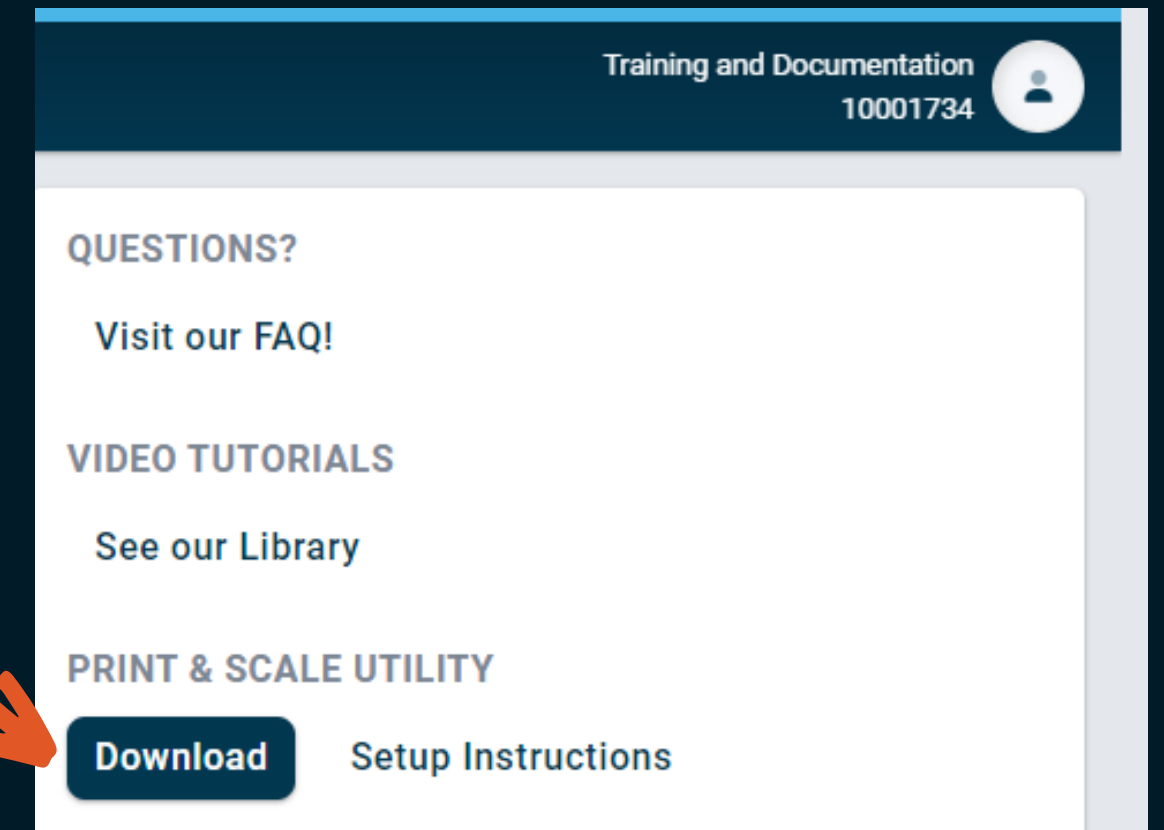
Print the labels directly to a label printer.



To print postage labels from DesktopShipper directly to a label printer you will need to install the DesktopShipper Print Utility App.

Please follow these steps:

- 1) On the DesktopShipper Dashboard page, click **Download**
- 2) The installer App named "PG-DSCloud_Print_Install.msi" will download to your Downloads folder.
- 3) Navigate to the Downloads folder, right click on the msi file and select "install".



Please note, the DesktopShipper Print Utility is only compatible with Microsoft Windows 10+. Earlier versions of Windows or other operating systems will require printing labels from the web browser

Installing the DS Cloud Print Utility

1) A Windows Defender SmartScreen prompt might appear stating that Windows has not recognized the app. You can ignore this window and install the app anyway.

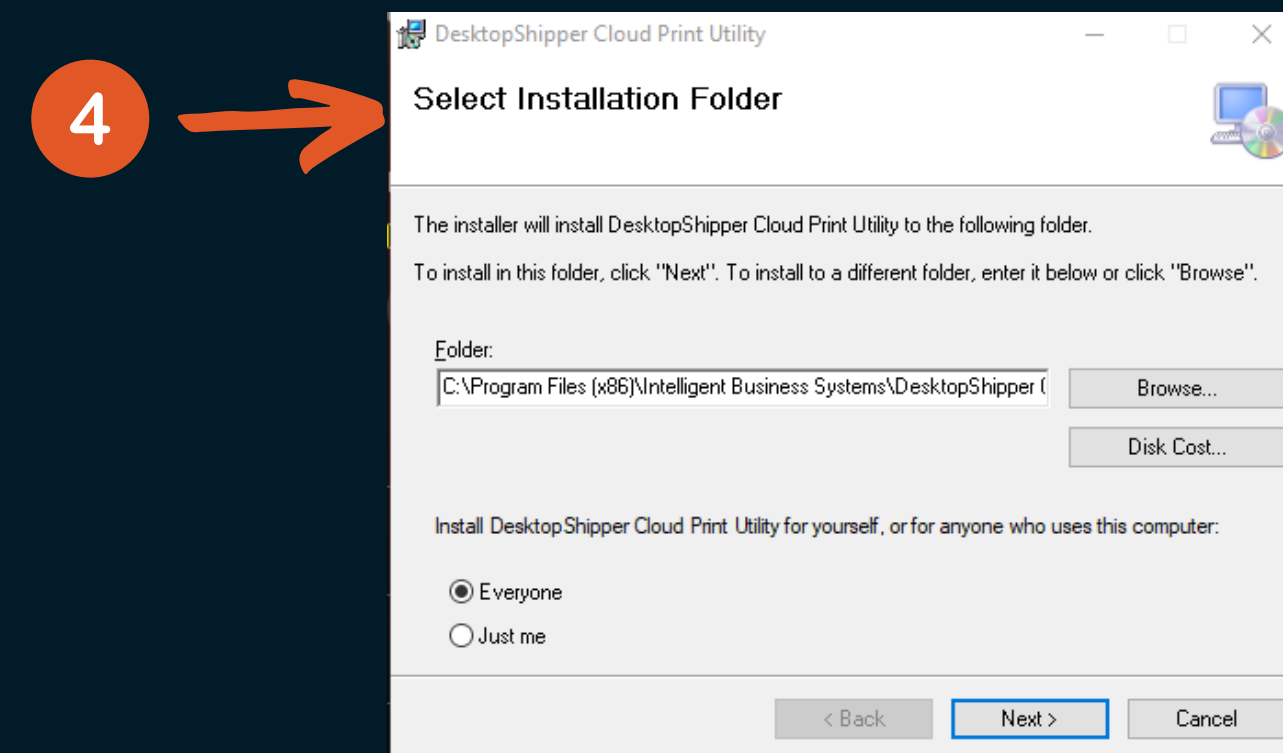
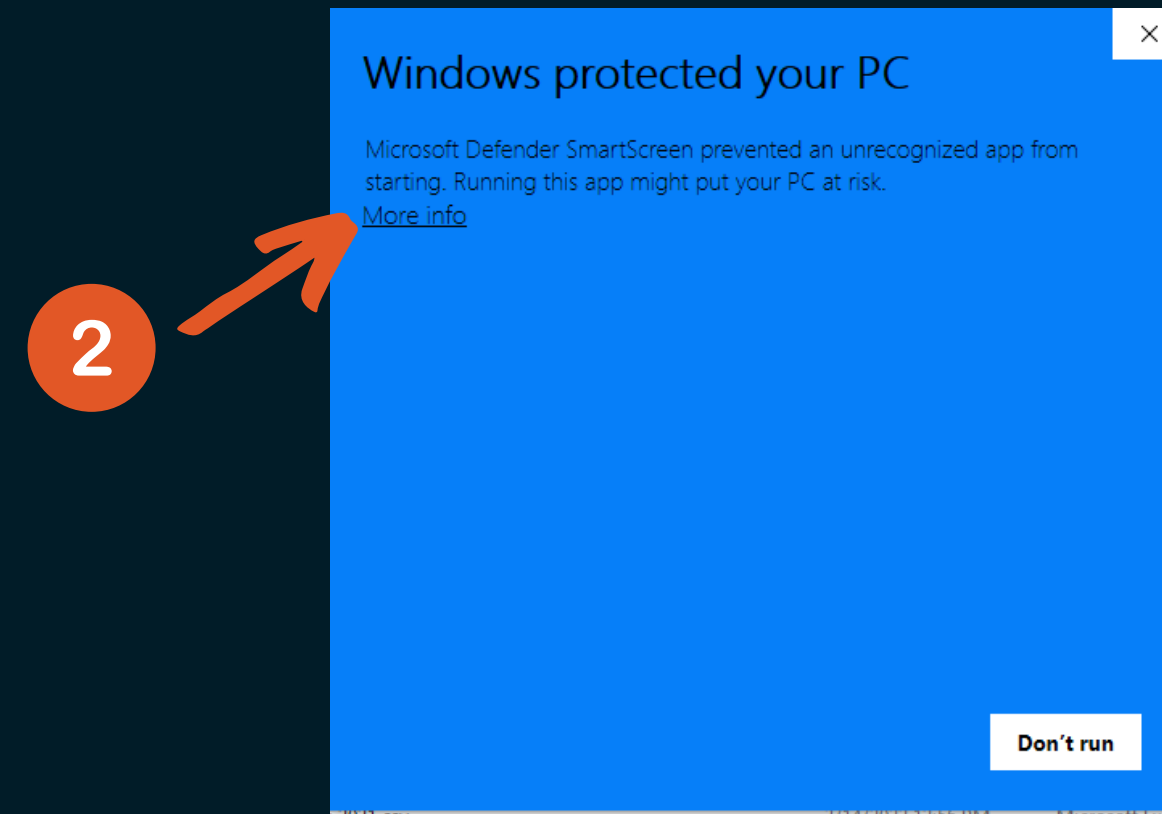
2) Click the "More Info" link and the "Run Anyway" button should appear.

- If not please consult your IT person(s) and have them modify your security policies to allow the app to be installed.

3) Click the "Run Anyway" button.

4) The Select Installation Folder window will appear which asks if you want to change the location folder and if you want everyone access to the app or just the current Windows user. It is recommended to keep both the settings as is.

5) Click **Next >**



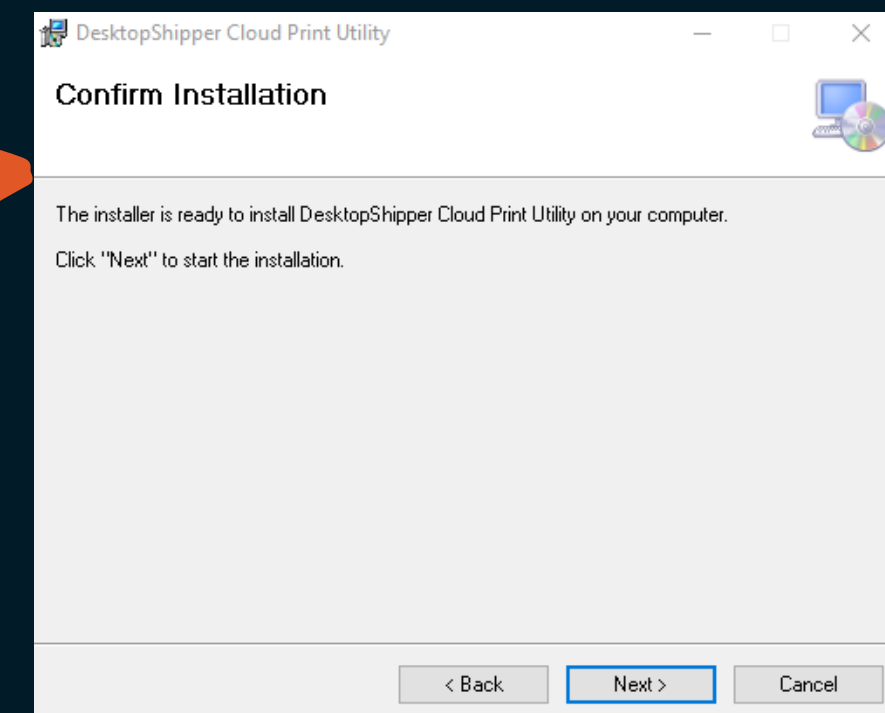
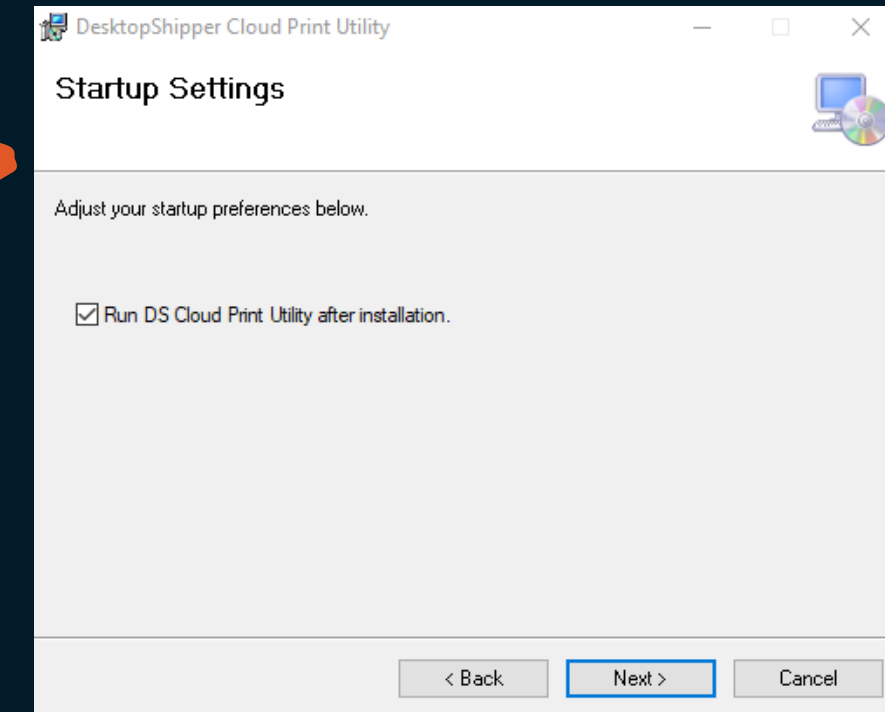
Installing the DS Cloud Print Utility

1) The Startup Settings window will appear next. We recommend leaving the "Run DS Cloud Print Utility after installation" option enabled.

2) Click **Next >**

3) When the Confirm Installation window appears...

4) Click **Next >**



Installing the DS Cloud Print Utility

1) The Print Utility app will install and 2 windows will appear.

- The Installation Complete window
- The Login and Register window

2) In the Login and Register window enter your DS Cloud user email address that you current have logged into DS Cloud.

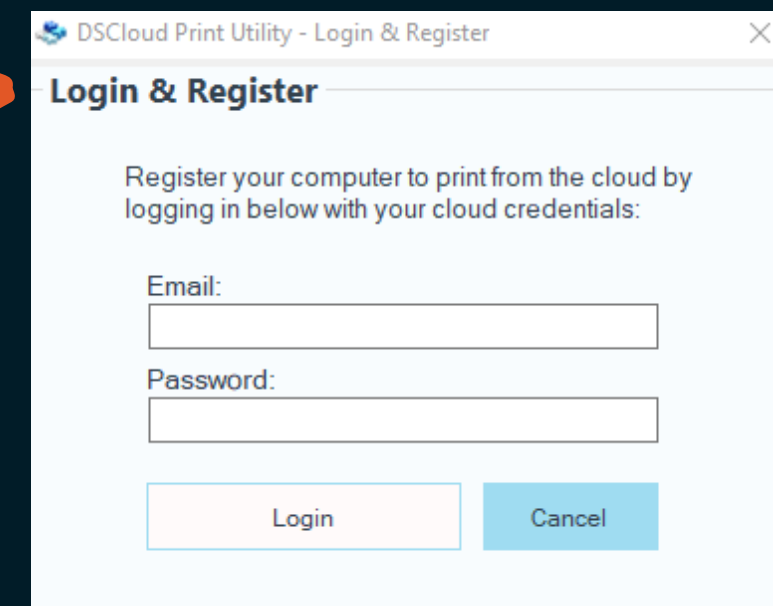
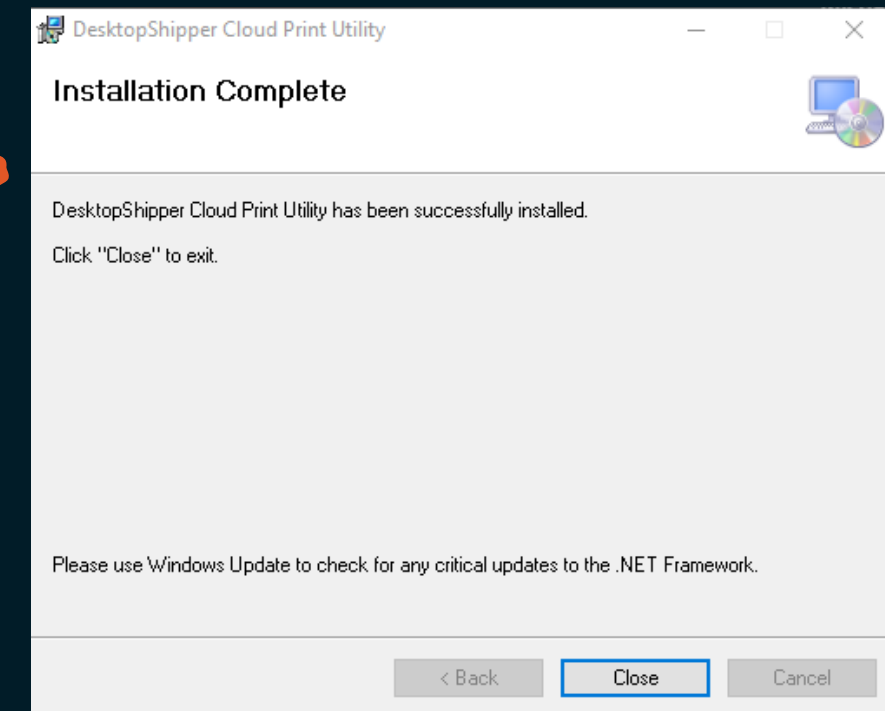
3) Next, enter your password.

4) Click

Login

5) In the Installation Complete window, click

Close



Installing the DS Cloud Print Utility

The DS Cloud Print Utility - Configure window will appear.

1) Click

+Add Device

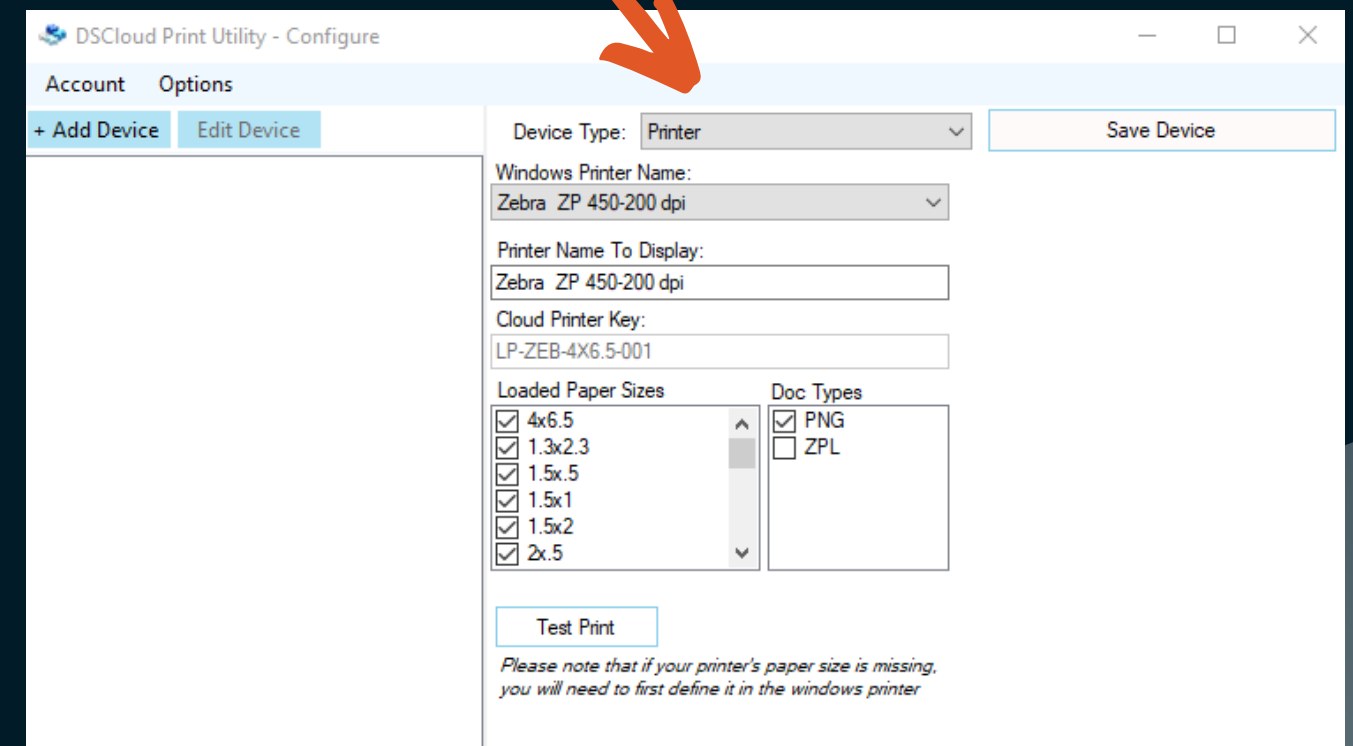
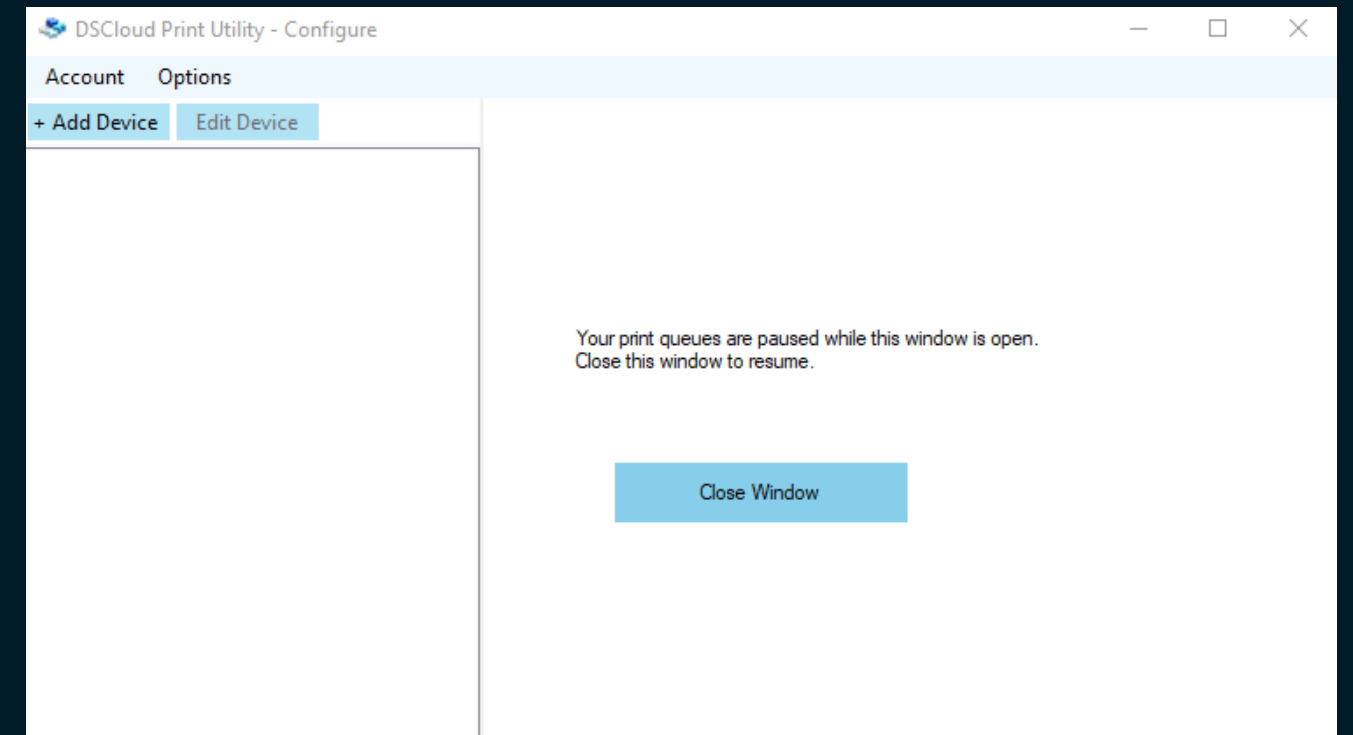
2) The option for Printer should be selected in "Device Type" dropdown menu.

3) The Windows Printer Name dropdown will appear. Select the label printer you want the app connected to.

4) Give the printer a unique name to display or keep the Windows printer name as is.

5) In the "Loaded Paper Sizes" section, if 4x6 (or your label size) is missing from the list. You will need to add the size to your printer driver.

If your label size is listed, leave the "Loaded Paper Sizes" as is. Unless you plan to use ZPL printer language for your labels, leave the Doc Types with the PNG format selected.

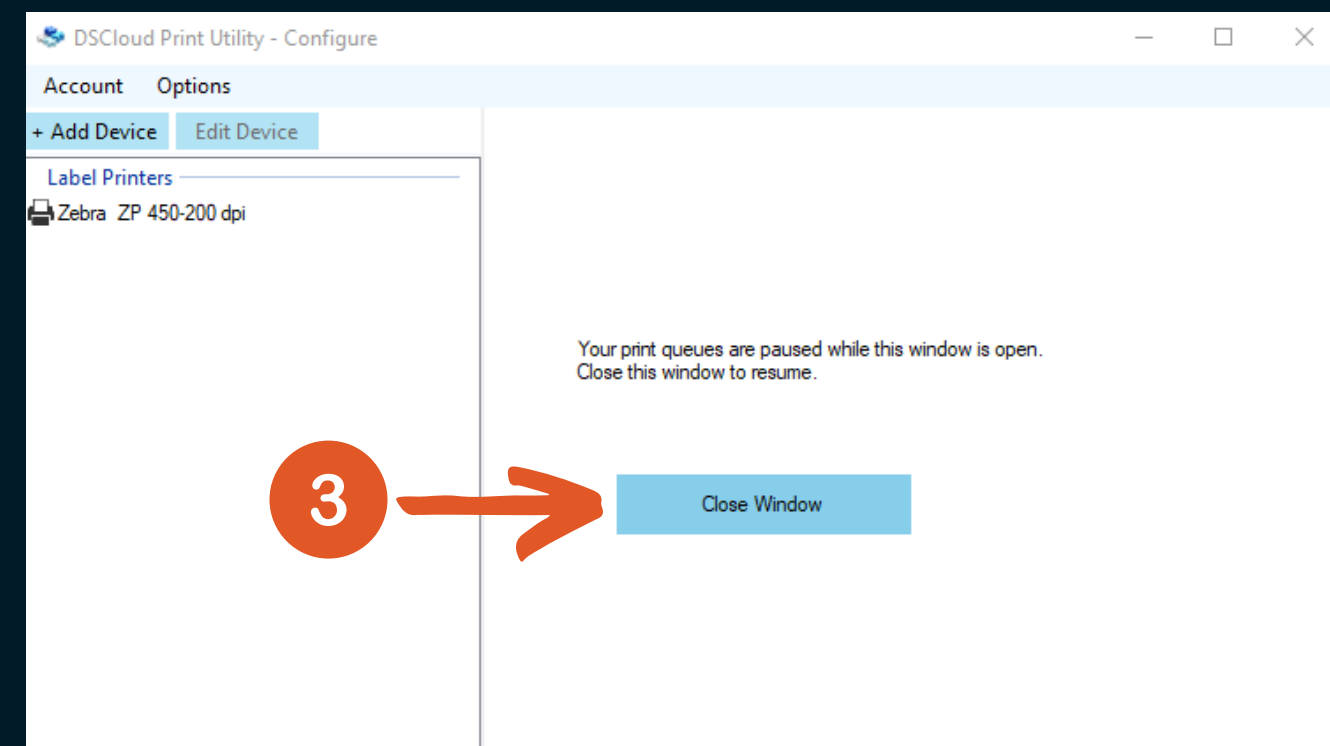
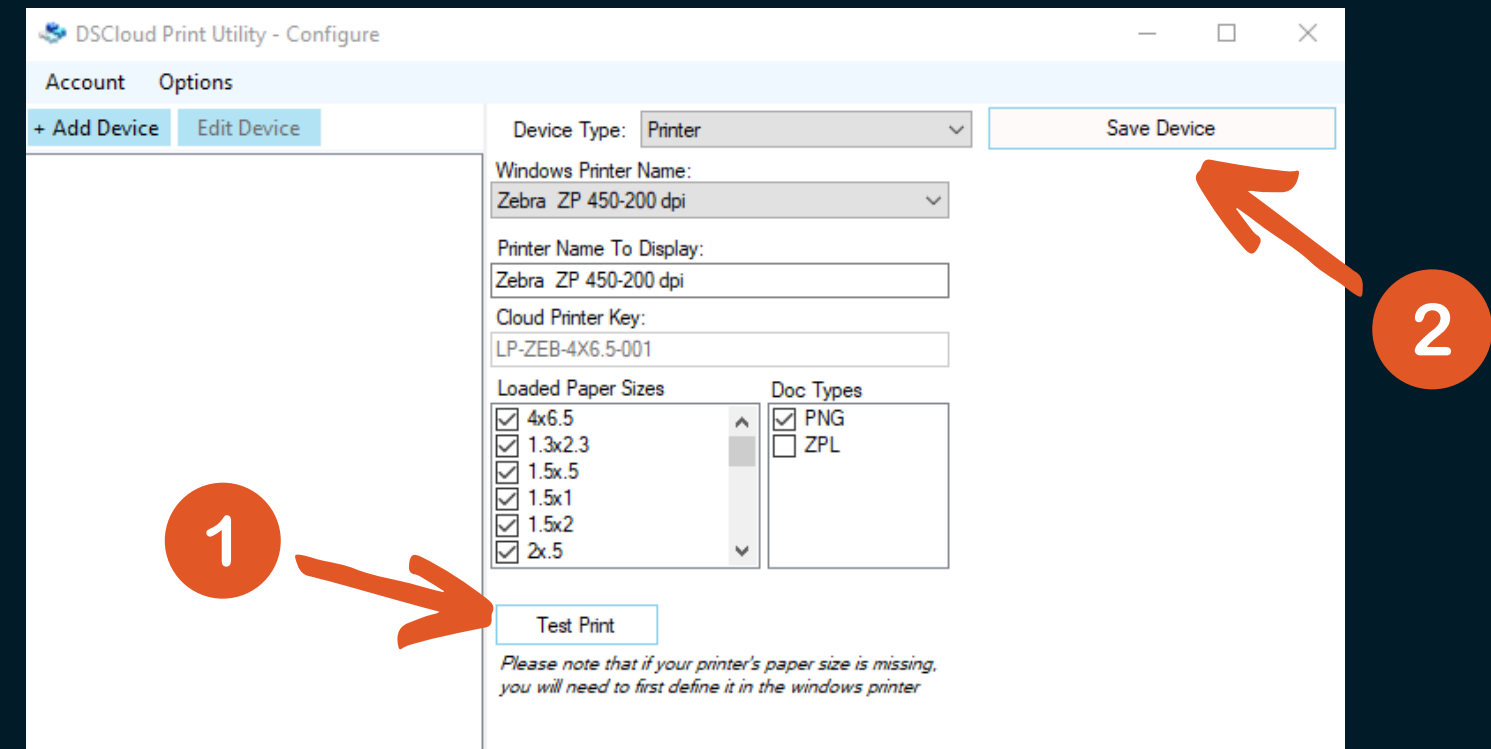


Installing the DS Cloud Print Utility

1) Click **Test Print** to verify the printer is working with the Print Utility app.

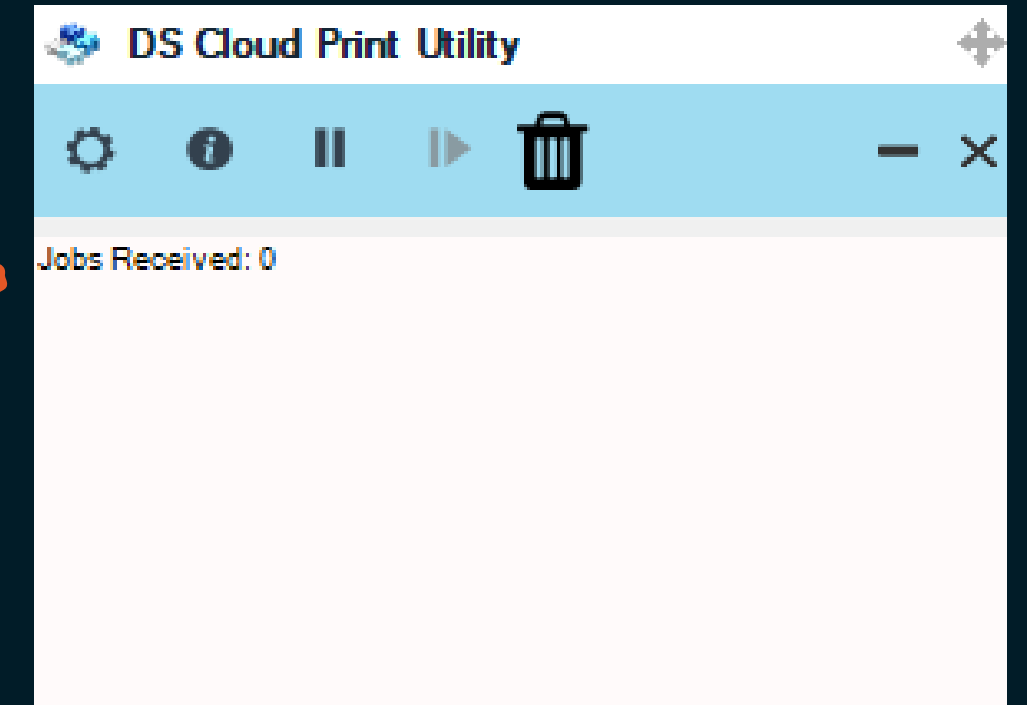
2) Click **Save Device**

3) Click **Close Window**

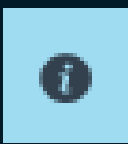


DS Cloud Print Utility

1) The DS Cloud Print Utility console appears on the bottom right of Windows, just above the taskbar. The following are the descriptions of the features of the console window.



 Opens the configuration window


 Opens the Print Utility info window. In this window you can check for app updates.

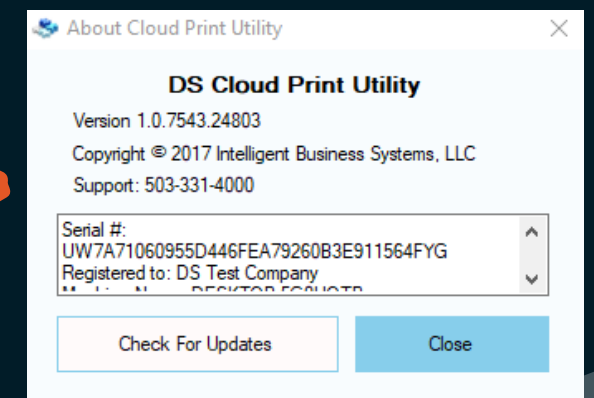
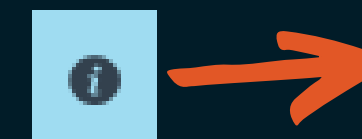
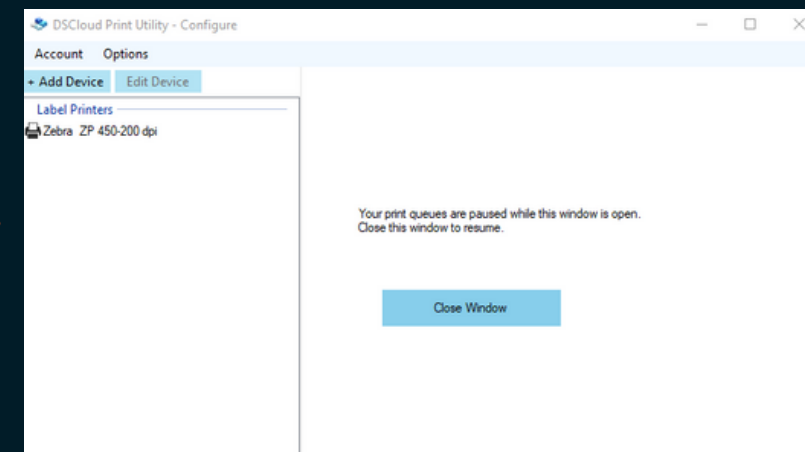
 Pauses the print job queue

 Resumes the print job queue

 Clears the print job queue

 Minimize the print utility console

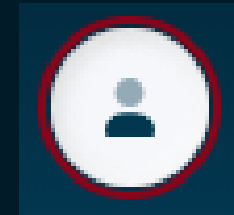
 Close the print utility console.
Note, closing the app will just send print jobs to the queue and prevent them from printing until the app is opened again.



DS Cloud Ship V2 - User Profile Printing Options

After installing the DS Cloud Print Utility you will need to log into DS Cloud Ship V2.

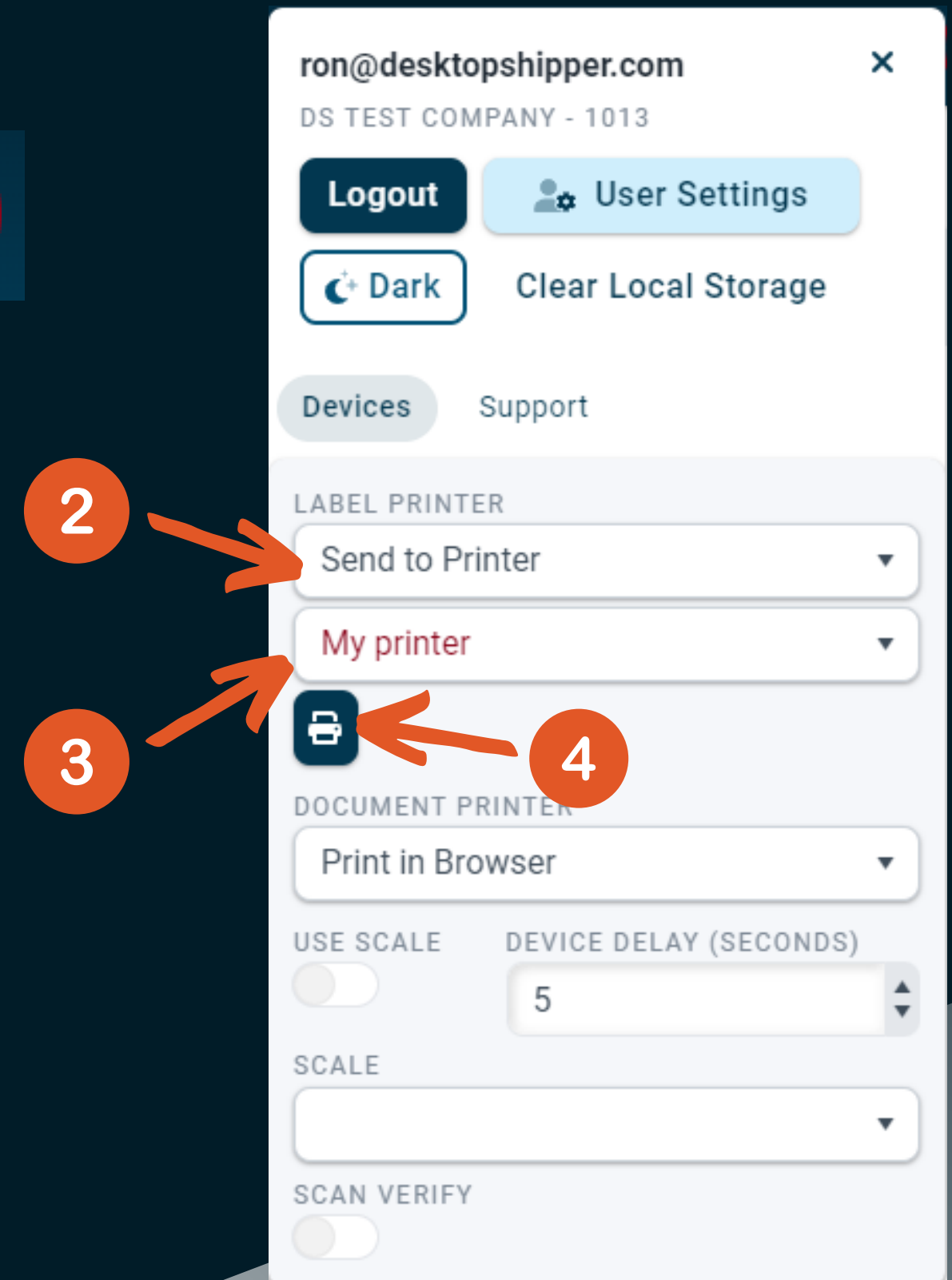
1) Click on your user profile button at the top right of the window.



2) Select "Send to Printer" under the Label Printer settings.

3) Use the following dropdown to select your targeted printer.

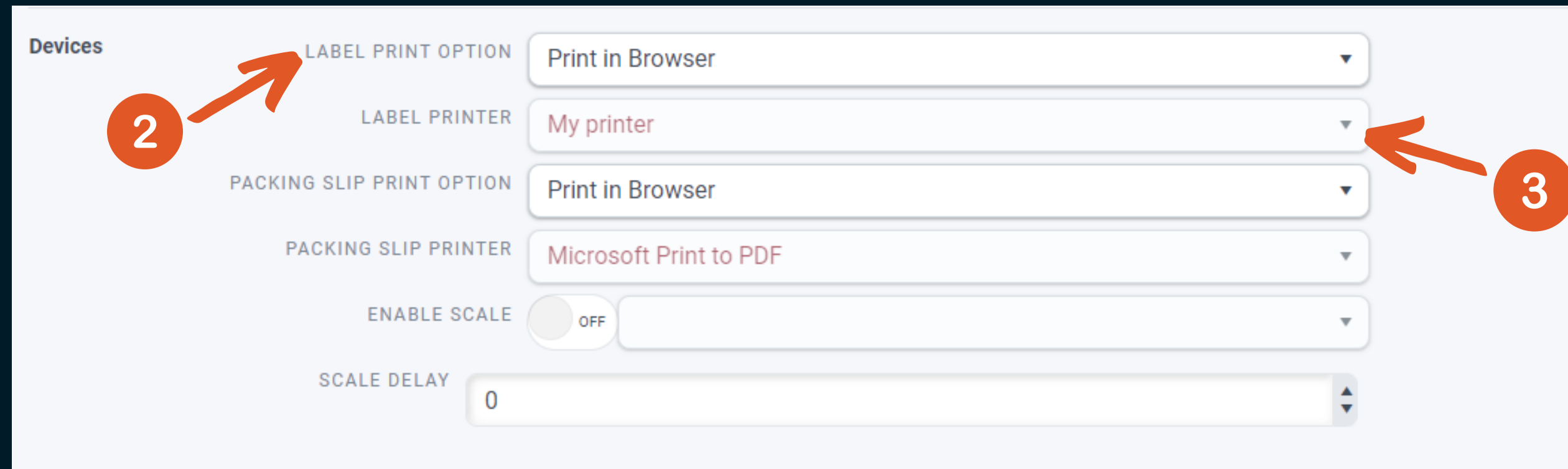
4) You can print a test label by clicking



DS Cloud Ship V2 - User Printing Options

In DS Cloud Ship V2, you can set up the printer also in the user settings.

- 1) Under the Settings menu, select "Users"
- 2) In the devices section, select "Send to Printer" under the Label Print Option setting.
- 3) Use the following dropdown to select your targeted printer.



Devices

LABEL PRINT OPTION: Print in Browser

LABEL PRINTER: My printer

PACKING SLIP PRINT OPTION: Print in Browser

PACKING SLIP PRINTER: Microsoft Print to PDF

ENABLE SCALE: OFF

SCALE DELAY: 0

Services & Service Groups

shipv2.desktopshipper.com

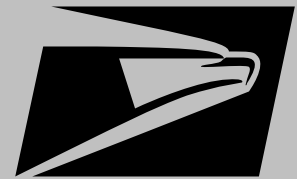


TRAINING

Service versus Service Group



GROUND



FIRST CLASS

FedEx ***HOME***

STANDARD

FIRST CLASS

GROUND

Service

An individual service from a carrier.

Examples would be:

USPS First Class

UPS Ground

FedEx Home

Service Group

A collection of services under a set name. These services can be from multiple carriers.

Service Groups

Service group names will appear on the left hand side. Click one to edit a service group.

Description is what displays in the drop down of shipping modules and carrier mapping page

Carrier Service Groups

2DAY
2DAYBEST
3DAY
Cheapest Rate
CUBONE
Fall
FEDEX
Mermaid
Monster
NARWHAL
OSM
Spring
Standard
Summer
TEST JULINA
Test2662
twst2
Winter

Standard

DESCRIPTION: Standard Svc

TYPE: RATE

AUTO-SHIP LEAST EXPENSIVE SERVICE

Save

Create

Available

Service ID	Service Name	Action
F11ASIG	FedEx 2Day®	→
F11PP	FedEx 2Day®	→
F16	FedEx 2Day® A.M.	→
F20	FedEx First Overnight®	→
F30	FedEx Express Saver®	→
F50	FedEx International Priority®	→
F60	FedEx International Economy®	→
F90	FedEx Home Delivery®	→
F92	FedEx Ground®	→
S32	FedEx Ground® Economy (under 1 lb.)	→

Selected

Service ID	Service Name	Action
F01	FedEx Priority Overnight®	←
F06	FedEx Standard Overnight®	←
F11	FedEx 2Day®	←
F11DSIG	FedEx 2Day®	←
F11ORSP	FedEx 2Day®	←
T43	OSM Parcel Select	←
U11	UPS® Ground	←
U48	UPS® Standard	←

1) Navigate to the Settings drop down

2) Choose "Service Groups"

3) You can now view/edit/ or add service groups of your choice.

Available: These are all your enabled carrier services you can choose to add to a service group. Use the arrows to shift a service into the group.

Selected: These are the services that the Service Group will compare upon shipping.

Creating a Service Group

- 1) Click the **Create** button on the top right side of the "Service Groups" page.
- 2) Set a name of your choosing.
- 3) Set a description.
- 4) Choose a type.
- 5) To move the available carrier services of your choice into the *Selected* side, click the right pointing arrow(s) on the right end of the services in the *Available* section.
- 6) Click **Save** when you have moved all the desired carrier services over to the "Selected" section.

The screenshot shows the 'New Service Group' form with the following fields and actions:

- NAME:** Training (Callout 2)
- DESCRIPTION:** Training and Docs (Callout 3)
- TYPE:** RATE (Callout 4)
- Available:** A list of carrier services with right-pointing arrows. Three arrows point from the Available section to the Selected section.
- Selected:** A search bar and a list of selected services, including F11 FedEx 2Day®.
- Save:** A button in the top right corner.

Available	Selected
U01 UPS Next Day Air®	F11 FedEx 2Day®
U03 UPS Next Day Air Saver®	
U05 UPS Next Day Air® Early	
U07 UPS 2nd Day Air®	
U09 UPS 2nd Day Air A.M.®	
U11 UPS® Ground	
U11 DG UPS® Ground	
U11RET UPS® Ground	

Service Group Types

TIME (Total Days)

When "Time (Total Days)" is selected the system will pick the service based on the amount of days you set for it to arrive within.

If a package was shipped with the example above on a Friday it would choose a service that would arrive by Sunday.

RATE

When "Rate" is selected the system will pick the service for your package by the cost to ship the package out

TIME (Business Days)

When "Time (Business Days)" is selected the system will pick the the service based on the amount of Business Days you set for it to arrive within.

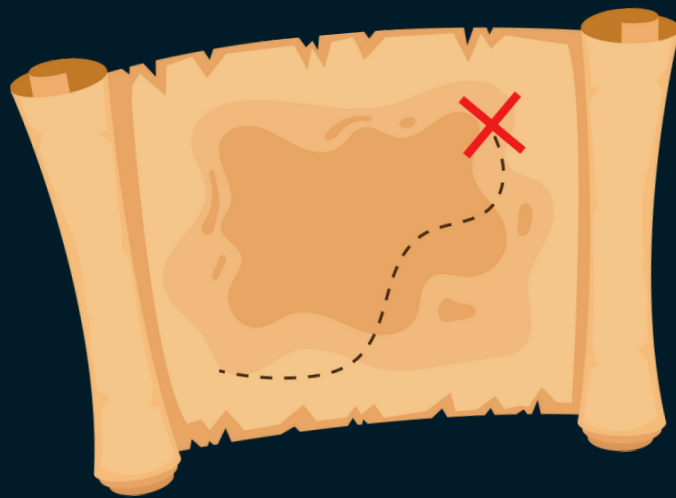
If a package was shipped with the example above on a Friday it would choose a service that would arrive by Tuesday.



Preparing Orders for Processing

shipv2.desktopshipper.com





PACKING SLIP

1113 Main Blvd.
Suite #100
Manhattan NY 54423
222-222-2222

ACME
CORPORATION

SHIP TO: Tom Jones
7225 Oak St.
Portland, OR 97455
United States
555-555-5555

INFO: Order Number: #505239223
Order Date: 10/07/2022
Shipping Method: INTSTANDARD
Reference ID: M229552

Total Quantity: 1

SKU	TITLE	QTY
602448444752	NCT 127 Album 2 Baddies Lanyard + Buttons Deluxe Box [4752]	1

Special Instructions:

#538132 DSC p043878630508132 1/1



Steps for Preparing Your Orders for Processing

Prior to shipping orders and after setting up profiles, there are 3 options you may want to consider before processing:

Carrier Mappings

Packing Slips

Packaging

Carrier Mapping

shipv2.desktopshipper.com



TRAINING



FedEx



What is Carrier Mapping?

Carrier Mapping is a method of setting rules to determine which service an order should use to create a shipping label.

A carrier mapping is created by selecting a customer's incoming ship method and directing it to a carrier service or service group.

**FREE
DELIVERY**

EXPEDITED

**2
DAY**

OVERNIGHT










STANDARD

Notes Regarding Incoming Ship Methods

- Incoming Ship Methods are sent by the orders' host system or integration.
- Incoming Ship Methods will vary based on the integration.
- Incoming Ship Methods can be overwritten by the bulk update tool.
- On manually created orders the Ship Methods are set by the creator.

How to Identify an Incoming Ship Method

- 1) Navigate to the "Orders" page.
- 2) Look for the "SHIP METHOD" .
- 3) Column in the order grid.
- 4) The Ship Method assigned by the host system will display here.

			ORDER ID	SOURCE	MARKET ID	SHIP METHOD	SERVICE
▶	<input type="checkbox"/>	Ready	104072		FALL122022	FEDEX	
▶	<input type="checkbox"/>	Ready	104074		INTFALL	2DAYBEST	
▶	<input type="checkbox"/>	Ready	104076		PSL91322	COFFEE	
▶	<input type="checkbox"/>	Ready	104109		testDDP	U61	
▶	<input type="checkbox"/>	Ready	104142		TIMETEST	T43	
▶	<input type="checkbox"/>	Ready	104208		testt	F11	
▶	<input type="checkbox"/>	Ready	104209		testing	U07	
▶	<input type="checkbox"/>	Ready	104210		testing1	T03	
▶	<input type="checkbox"/>	Ready	104245		MarkupTest	F90	

The Ship Method on this example order is "2DAYBEST"



What happens if I don't create carrier Mappings?

Without Carrier Mappings DesktopShipper is not aware of which carrier service or service group it should select to rate the order.

How to know if an order's ship method doesn't have a carrier mapping?

The screenshot displays a shipping management interface. At the top, there is a search bar for 'Order ID' and a 'Create Orders' button. Below this is a table of orders with columns for 'ORDER ID', 'SOURCE', 'MARKET ID', 'SHIP METHOD', 'SERVICE', 'RATE', 'ORDER DATE', and 'BATCH ID'. The first order, ID 102847, has a 'None' ship method. A modal dialog box is open over the table, showing the URL 'shipv2.desktopshipper.com' and the message: 'Method could not be mapped. Would you like to navigate to the carrier inbound mappings to create one?'. The dialog has 'OK' and 'Cancel' buttons. A yellow arrow points from the 'Duplicate Order Flip Address' button to the dialog box.

There are two ways to tell if a carrier mapping doesn't exist:

- 1) Simply try shipping the order and the system will notify you.
- 2) Check the carrier mapping page.

Navigating to the Carrier Mappings Page

- 1) Navigate to the *Settings* Drop Down.
- 2) Navigate to the *Carriers/Marketplace Mapping* choice.

The screenshot displays the 'Carrier Marketplace Mappings' interface. At the top, there is a navigation bar with 'ORDERS', 'BATCHES', 'CSV', 'SHIPMENTS', 'END OF DAY', and 'SETTINGS'. The 'SETTINGS' dropdown is active. On the right, it shows 'Training and Documentation' and the user ID '10001734'. The main content area is titled 'Carrier Marketplace Mappings' and includes a sidebar with options like 'Non-market Specific', 'BigCommerce', 'CSV Import', 'Manually Created Orders', 'Odbc Integration', and 'Public Api'. The 'BigCommerce' section is selected. The main area has tabs for 'Inbound Shipmethod', 'Inbound Return Service', and 'Carrier Update'. Below the tabs is a search bar labeled 'BigCommerce' with a 'Search Value' input field and 'Add' and 'Save' buttons. A table with two columns, 'MARKET SHIP METHOD' and 'SHIP METHOD', is shown. The table contains one row with 'U11' in the 'MARKET SHIP METHOD' column and 'U11 - UPS® Ground' in the 'SHIP METHOD' column. Two orange arrows point to the column headers. At the bottom right of the table, it says '1 - 2 of 2 items'.

From this page you can look at your existing carrier mappings per marketplace.

Market Ship Method - The method passed from the host system that needs to be mapped.

Ship Method - The service or Service group you are directing the Market Ship method to map to.

Adding a Carrier Mapping - Basic Steps

1

Select the marketplace you want to create the carrier mapping for, make sure you are on the inbound ship method tab

4

Click Save when you are finished configuring the carrier mapping.

Carrier Marketplace Mappings

Non-market Specific
BigCommerce
CSV Import
Manually Created Orders
Odbc Integration
Public Api

Inbound Shipmethod | Inbound Return Service | Carrier Update

BigCommerce Search Value

MARKET SHIP METHOD	SHIP METHOD
NONE	Standard

Market Ship Method: NONE
Alt. Ship Method: None
Secondary Market: Any
Origin Country:
Dest. State or Province: Add State/Province

Ship Method: Standard
Integration:
Profile:
Dest. Country:
USPS Zone: =
Min. Order Weight: >
Max. Order Weight: <

U11 - UPS® Ground
U11 - UPS® Ground

Add Save

2

Select the Market Ship Method you would like to map. We will use "NONE" from the examples on the previous slides

3

The Ship Method is where you want to direct the market ship method to map to. You can choose to map directly to a service or to a service group. For this example we will map to Standard.

Carrier Mapping in Action

- 1) The order has an incoming ship method from the host system as "NONE"
- 2) When launching the ship module the ship method "None" reconciles the mapping rules we set up on the previous slides and directs to the *Standard Service* group
- 3) From that Service Group, **UPS** ground is chosen.

The screenshot displays a shipping management interface. At the top, there's a search bar and a 'Create Orders' button. Below is a table with columns: ORDER ID, SOURCE, MARKET ID, METHOD, SERVICE, RATE, ORDER DATE, and BATCH ID. The table shows three orders with 'None' as the ship method. A yellow circle '1' points to the 'None' method in the first row.

An 'All Rates' modal window is open, showing a table of shipping options. The 'UPS (1)' option is selected. A yellow circle '3' points to this selection. The modal includes fields for 'ORDERED', 'SHIP BY', and 'DELIVER BY', and a 'Package 1' section with details like 'UPS® Ground', 'TRANSIT 1 day', and 'ZONE'. It also has sections for 'SPECIAL SERVICES' (Signature Required, DesktopShipper Insurance) and 'BILL DUTIES/TAXES TO' (Prepaid, Sender).

On the right, the 'Order ID 102847' details are shown. The 'SHIP METHOD' dropdown is set to 'Standard Svc'. A yellow circle '2' points to this dropdown. Below it, the 'PACKAGING' section shows 'Not Specified' and a table of package items. At the bottom, a table shows the selected service: 'U11 UPS® Ground' with a rate of '\$17.49'. A 'TOTAL \$17.49' is also visible.

Adding a Carrier Mapping - Advanced

On occasion, a single carrier mapping rule per incoming method is not suitable and you will need sub rules. Fortunately, DesktopShipper has a variety of ways to cover your mappings needs.

For this example lets take the previous mapping and build on it.



The existing mapping states that if the ship method from the host system is "NONE" it directs to the "Standard" service group. The "Standard" service group has many options for the system to choose from. The customer requested that orders going to the state of Oregon to always choose between Fedex Home/Ground and UPS Ground. We have a service group created for those called "Training".

"STANDARD" SERVICE GROUP

Selected		Search
F01	FedEx Priority Overnight®	←
F06	FedEx Standard Overnight®	←
F11	FedEx 2Day®	←
F11DSIG	FedEx 2Day®	←
F11ORSP	FedEx 2Day®	←
T43	OSM Parcel Select	←
U11	UPS® Ground	←
U48	UPS® Standard	←

"TRAINING" SERVICE GROUP

Selected		Search
F90	FedEx Home Delivery®	←
F92	FedEx Ground®	←
U11	UPS® Ground	←

Adding a Carrier Mapping - Advanced

To accomplish the requested carrier mapping we need to create an additional mapping.

The screenshot shows the BigCommerce carrier mapping configuration interface. The interface is divided into two main sections: MARKET SHIP METHOD and SHIP METHOD. The MARKET SHIP METHOD section is currently set to NONE, and the SHIP METHOD section is set to Training. The configuration includes various fields for market and ship method details, such as Market Ship Method, Alt. Ship Method, Secondary Market, Origin Country, Dest. State or Province, Min. Order Value, Max. Order Value, Ship Method, Integration, Profile, Dest. Country, USPS Zone, Min. Order Weight, and Max. Order Weight. The Dest. State or Province field has a button labeled "Add State/Province". The interface also features a search bar at the top left, an "Add" button at the top right, and a "Save" button at the bottom right.

The new mapping is created for incoming ship method of "NONE" to "Training". However, we need to add the OREGON state variable so the system will allow a save, otherwise it will see a mapping already existing for that method.

Adding a Carrier Mapping - Advanced

- 1) Click the **Add State/Province** button on the Carrier Mapping window
- 2) Select the state or province you would like the rule to apply to.
- 3) Click **Close**

Manage Mapping Destination States/Provinces ×

Select States, Territories and Provinces below.

U.S. States Add All US States

AA	AE	AK	AL	AP	AR	AZ	CA	CO	CT	DC	DE
FL	GA	HI	IA	ID	IL	IN	KS	KY	LA	MA	MD
ME	MI	MN	MO	MS	MT	NC	ND	NE	NH	NJ	NM
NV	NY	OH	OK	OR	PA	RI	SC	SD	TN	TX	UT
VA	VT	WA	WI	WV	WY						

U.S Territories Add All US Territories

AS	FM	GU	MH	MP	PR	PW	VI
----	----	----	----	----	----	----	----

Canadian Provinces Add All Canadian Provinces

AB	BC	MB	NB	NL	NT	NS	NU	ON	PE	QC	SK
YT											

2

3

Close

Adding a Carrier Mapping - Advanced

You can now see the state variable has been applied for the "NONE" to "Training" mapping.

The visual que is the darkened **Add State/Province** button

The screenshot displays a configuration interface for carrier mappings, divided into two main columns: 'MARKET SHIP METHOD' and 'SHIP METHOD'.

MARKET SHIP METHOD:

- NONE (top entry):** Market Ship Method: NONE; Alt. Ship Method: None; Secondary Market: Any; Origin Country: (empty); Dest. State or Province: Add State/Province; Min. Order Value: > (empty); Max. Order Value: < (empty).
- NONE (bottom entry):** Market Ship Method: NONE; Alt. Ship Method: None; Secondary Market: Any; Origin Country: (empty); Dest. State or Province: **Add State/Province** (darkened); Min. Order Value: > (empty); Max. Order Value: < (empty).

SHIP METHOD:

- Standard:** Ship Method: Standard; Integration: Any; Profile: (empty); Dest. Country: (empty); USPS Zone: = (empty); Min. Order Weight: > (empty); Max. Order Weight: < (empty).
- Training:** Ship Method: Training; Integration: Any; Profile: (empty); Dest. Country: (empty); USPS Zone: = (empty); Min. Order Weight: > (empty); Max. Order Weight: < (empty).

An orange arrow points to the darkened 'Add State/Province' button in the bottom 'NONE' entry of the 'MARKET SHIP METHOD' column.

Adding a Carrier Mapping - Advanced

Advanced Carrier Mapping in Action

The screenshot displays a shipping management interface. On the left, a table lists orders with columns for Order ID, Source, Market ID, Ship Method, and Service. An orange arrow points to the 'None' ship method for order 102847. On the right, a detailed view for Order ID 102847 shows shipping information, including the ship to address (DesktopShipper Support Team, 3220 SW 1ST AVE, SUITE 100, PORTLAND, OR 97239-4654 US) and the ship method dropdown menu. The dropdown menu is open, showing 'Training and Docs' selected. Below this, the packaging details are shown, including 'Not Specified' packaging, a weight of 2.00 LB, and dimensions of 0.00 IN x 0.00 IN x 0.00 IN. The package items list includes '[Sample] Able Brewing System' (ABS) and '[Sample] Laundry Detergent' (CGLD). The rate card shows a service of 'F92 FedEx Ground®' with a rate of \$11.90 and itemized charges for 'FedEx Ground Fuel' at \$1.77. The total rate is \$11.90.

ORDER ID	SOURCE	MARKET ID	SHIP METHOD	SERVICE
102847		144	None	
102848		145	None	
102849		146	None	

Order ID 102847 | Meggie's | Date Advance | Auto-Ship

Ship To: DesktopShipper Support Team, 3220 SW 1ST AVE, SUITE 100, PORTLAND, OR 97239-4654 US, support@desktopshipper.com

*** SHIP METHOD:** Training and Docs | Package 1 of 1

PACKAGING: Not Specified | REFERENCES: 2

VALUE (USD): \$2.00 | *** WEIGHT (LB):** 2.00 | **LENGTH (IN):** 0.00 | **WIDTH (IN):** 0.00 | **HEIGHT (IN):** 0.00

Manage Package Items:

- [Sample] Able Brewing System (ABS) # 1 1.0 \$0.00
- [Sample] Laundry Detergent (CGLD) # 1 1.0 \$0.00

PACKAGE	SERVICE	RATE
1	F92 FedEx Ground®	\$11.90

Itemized Charges: FedEx Ground Fuel \$1.77

TOTAL: \$11.90

Buttons: Clear Rate, Rate, Ship

- The incoming ship method is "None".
- The ship to state is **Oregon**.

The System reconciles the "None" to "TRAINING" mapping and selects the "Training and Docs" service group.

Adding a Carrier Mapping - Advanced

There are many additional variables you can choose to create advanced carrier mapping rules

Market Ship Method	NONE	Ship Method	Standard
Alt. Ship Method	None	Integration	Any
Secondary Market	Any	Profile	
Origin Country		Dest. Country	
Dest. State or Province	Add State/Province	USPS Zone	=
Min. Order Value	>	Min. Order Weight	>
Max. Order Value	<	Max. Order Weight	<

Please reach out to our support team if you need assistance utilizing any of the fields from the above image.

Packing Slips

shipv2.desktopshipper.com



PACKING SLIP

1113 Main Blvd.
Suite #100
Manhattan NY 54423
222-222-2222

ACME
CORPORATION

SHIP TO: Tom Jones
7225 Oak St.
Portland, OR 97455
United States
555-555-5555

INFO: Order Number: #SGS239223
Order Date: 10/07/2022
Shipping Method: INTSTANDARD
Reference ID: M229552

Total Quantity: 1

SKU	TITLE	QTY
602448444752	NCT 127 Album 2 Baddies Lanyard + Buttons Deluxe Box [4752]	1

Special Instructions:

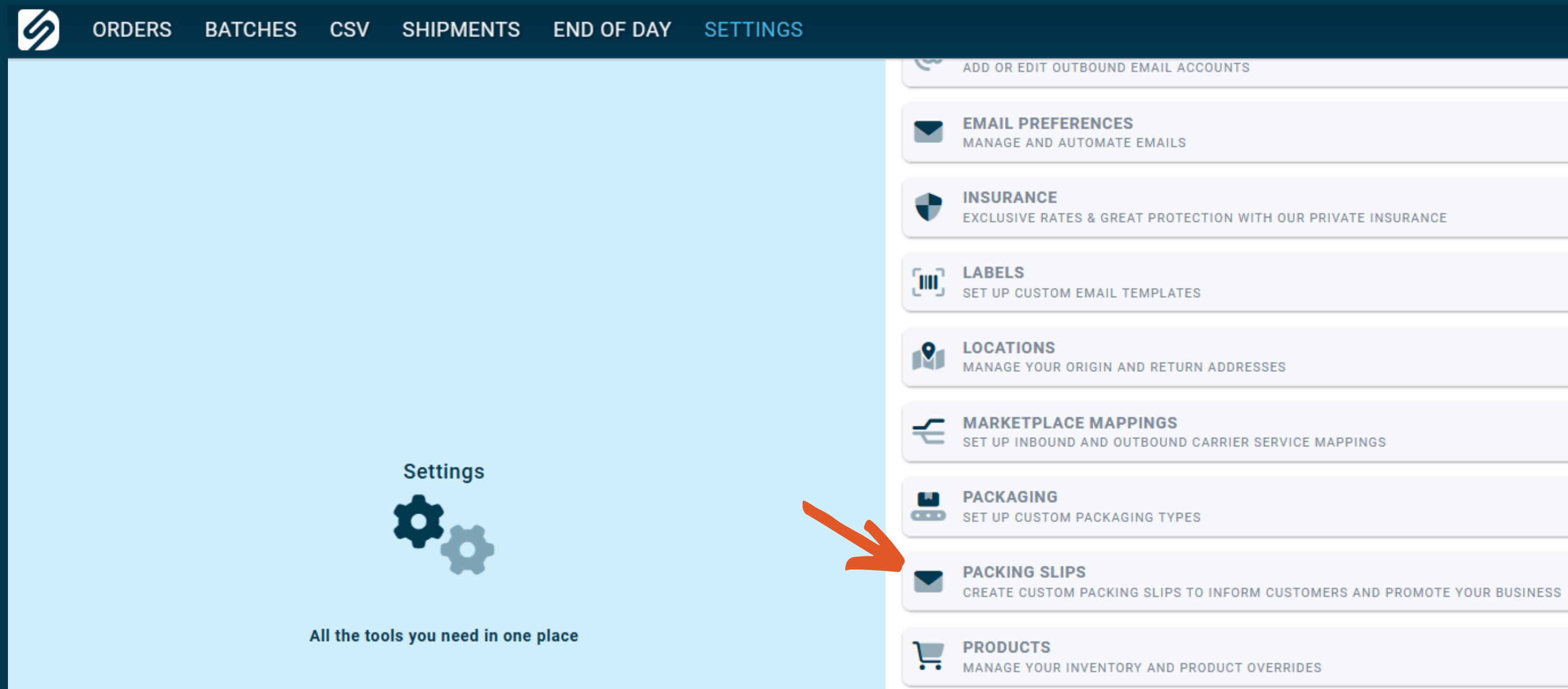
#538132 DSC p94387863o538132 1/1

This section covers configuring a packing slip that will print along with your postage labels.



Adding a Packing Slip

To reach the Packing Slip Settings page, select the "Settings" menu and click Packing Slips.

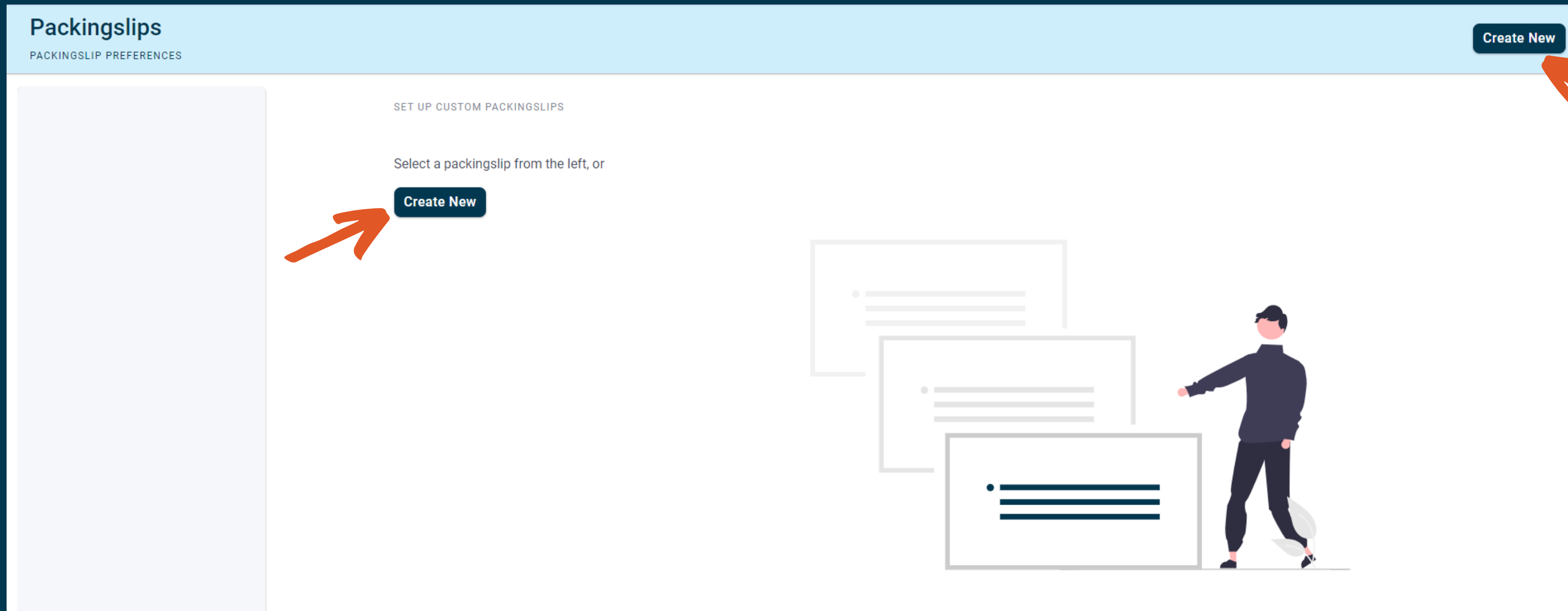


The screenshot displays a software interface with a dark blue header containing a logo and navigation links: ORDERS, BATCHES, CSV, SHIPMENTS, END OF DAY, and SETTINGS. The main content area is light blue and features a large gear icon labeled "Settings" with the text "All the tools you need in one place" below it. On the right side, there is a vertical list of settings categories, each with an icon and a brief description. An orange arrow points to the "PACKING SLIPS" category, which is highlighted. The categories listed are:

- ADD OR EDIT OUTBOUND EMAIL ACCOUNTS
- EMAIL PREFERENCES: MANAGE AND AUTOMATE EMAILS
- INSURANCE: EXCLUSIVE RATES & GREAT PROTECTION WITH OUR PRIVATE INSURANCE
- LABELS: SET UP CUSTOM EMAIL TEMPLATES
- LOCATIONS: MANAGE YOUR ORIGIN AND RETURN ADDRESSES
- MARKETPLACE MAPPINGS: SET UP INBOUND AND OUTBOUND CARRIER SERVICE MAPPINGS
- PACKAGING: SET UP CUSTOM PACKAGING TYPES
- PACKING SLIPS: CREATE CUSTOM PACKING SLIPS TO INFORM CUSTOMERS AND PROMOTE YOUR BUSINESS**
- PRODUCTS: MANAGE YOUR INVENTORY AND PRODUCT OVERRIDES

Adding a Packing Slip (continued)

Click the **Create New** button to set up a new packing slip.



Adding a Packing Slip (continued)

Basic Packing Slip Settings

- 1) Name the packing slip.
- 2) Associate the packing slip with a profile. Not associating a profile will make the system print the packing slip with every order.
- 3) Set the packing slip to only print with a certain marketplace.
- 4) If not associated to a profile, you can set the packing slip to use a return address.
- 5) Clicking the "plus sign" button will open a window to add a return address that is not already listed in the system.

The screenshot shows a web form titled "Create Packingslip Preference" with a "Save" button in the top right corner. The form is divided into two main sections: "Packslip" and "Mapping".

- Packslip:** Includes a "PACKSLIP NAME" text input field (callout 1) and an "ENABLED" toggle switch.
- Mapping:** Includes three dropdown menus: "PROFILE" (callout 2) with "No Profile" selected, "MARKETPLACE" (callout 3) with "Not Market Specific" selected, and "RETURN LOCATION" (callout 4) with "No Location Selected" selected.

Below the "RETURN LOCATION" dropdown is a text input field for a return address and a blue "+" button (callout 5) to add a new location.

For further info on Packing Slips, please view our complete document on configuring Packing Slips.

Packaging

shipv2.desktopshipper.com





What is packaging?

Packaging in DesktopShipper refers to any external container and/or internal materials that are used to ship and protect the item(s) being shipped



Why is packaging important?

- Packaging is used to protect the item(s) during shipment.
- Shipment cost is determined by the Total Weight. (order items + packaging)
- Dimensional weight is determined by the external dimensions of the package and can exceed the packages' scale weight.
- Some carrier services require carrier-specific packaging in order to be valid for shipment.

How is packaging used in DesktopShipper ShipV2?

- Packaging dimensions can be manually applied to an order during shipment.
- Packaging can be selected from a prepopulated list in DS Cloud via drop-down.
- Packaging can be automatically applied to an order by line item sku.



Manually Adding Package Dimensions

Manually adding package dimensions in the 1 to 1 shipping module

Order 102749

Date Advance | Meggie's | Auto-Rate | Auto-Ship

Ship To: VERIFIED
From: DesktopShipper
Erica Frediani
3220 SW 1ST AVE
Return: SUITE 100
PORTLAND, OR 97239 US
5033314000
clark@desktopshipper.com

SHIP METHOD: U11: UPS® Ground

Package 1 +

PACKAGING: Not Specified

VALUE (USD): \$2.00

WEIGHT (LB): 2.0000

DIMENSIONS (IN): 0.0000 | 0.0000 | 0.0000

REFERENCES: 2 | 0 | 0

Manually adding dimensions on the orders under the Fields tab

ORDER ID: 102749 | SOURCE: | MARKET ID: 136 | SHIP METHOD: U11

Ready

Details | Fields | Line Items 2 | Packages 0 | Notes 0 | Tags 0

CARRIER: U11: UPS® Ground

SHIP METHOD: U11: UPS® Ground

WEIGHT (LB): 2.0

STATUS: New

CLASS:

RETURN SERVICE:

DIMENSIONS (IN): 8 | 6 | 5

PROFILE: Meggie's

Save

Manually Adding Package Dimensions

Using the bulk update feature to manually add dimensions to a group of orders

The screenshot displays a shipping management interface with a 'Bulk Update' modal open. The modal is titled 'Bulk Update' and shows '1 orders selected'. A dropdown menu is set to 'Dimensions'. Below this, there are three input fields for 'Length', 'Width', and 'Height'. The 'Length' field contains '8.0000 in', the 'Width' field contains '6.0000 in', and the 'Height' field contains '5'. An 'Apply' button is located at the bottom right of the modal. The background interface shows a list of orders, with one order selected (checkbox checked). The order ID is '102681' and its status is 'Ready'. A 'Bulk Update' button is visible in the background interface.

Select group of orders here: (Yellow arrow pointing to the order selection checkbox)

"Dimensions" selected under "Value to change" drop-down (Orange arrow pointing to the dropdown menu)

Package dimensions manually added here (Orange arrows pointing to the Length, Width, and Height input fields)

Bulk update selected here (Yellow arrow pointing to the Bulk Update button in the background)

Adding a Custom Box

Custom package types can be added in DesktopShipper Cloud which make them available in the Packaging drop-downs the Cloud and DSX

1) Navigate to "Settings" and select "Packaging" from the drop-down

2) This opens the "Packaging" window where custom boxes can be added or edited:

SETTINGS ▾

Settings

- API
- Carrier
 - Accounts
 - Carrier Services
 - Marketplace Mappings
 - Service Groups
 - Tax Value Mappings
 - Third-Party Billing
- Chemical Records
- Devices
- Emails
- Global
- Integrations
- Labels
- Locations
- Packaging**
- Packingslips
- Products
- Product Overrides
- Profiles
- Users
- DesktopShipper Insurance

Create New Package Type

















	BOX ID	DESCRIPTION	LENGTH (IN)	WIDTH (IN)	HEIGHT (IN)	WEIGHT (LBS)	COST (USD)	BARCODE	DRY ICE (LBS)
	1234	FedEx Pak	0	0	0	0.0	\$0.00		0.0
	6x6x6	6x6x6	6	6	6	0.0	\$0.00		0.0
	BLAZORTEST	BLZTEST	1	2	3	3.0	\$0.00	1234567	0.0
	Box A	TEST Box A	4	4	4	0.2	\$0.00		0.0
	Box B	TEST Box B	8	8	8	0.5	\$0.00		0.0
	Box C	TEST Box C	12	12	12	0.8	\$0.00		0.0
	FEDEXDEFAULT	FEDEXDEFAULT	14.75	11.75	0.2	0.0	\$0.00		0.0

Adding a custom box in DesktopShipper

This page explains the features of the Packaging screen in DS Cloud

Create a new custom package here

Create New Package Type

	BOX ID	DESCRIPTION	LENGTH (IN)	WIDTH (IN)	HEIGHT (IN)	WEIGHT (LBS)	COST (USD)	BARCODE	DRY ICE (LBS)
 	1234	FedEx Pak	12	6	0	0.0	\$0.00		0.0
 	6x6x6	6x6x6	6	6	6	0.0			
 	BLAZORTEST	BLZTEST	8	8	3	3.0			
 	Box A	TEST Box A	8	8	4	0.2			
 	Box B	TEST Box B	8	8	8	0.5			
 	Box C	TEST Box C	12	12	12	0.8	\$0.00		0.0
 	FEDEXDEFAULT	FEDEXDEFAULT	14.75	11.75	0.2	0.0	\$0.00		0.0
 		TEST Box	8						0.0

Add dimensions for your package

Do your boxes have barcodes?
The barcode value can be assigned to the packaging in Cloud and can be scanned in during shipping.

Edit or delete an existing package

Assign a weight for your packaging.
This will be added to the Total Order Weight when rating.

Use Custom Packaging When Shipping

Custom packaging will appear in the Packaging drop-down menus in DesktopShipper in addition to carrier provided packaging

DesktopShipper 1 to 1 shipping window

The screenshot shows the DesktopShipper interface for a 1 to 1 shipping window. At the top, it displays 'Order 102790'. Below this are controls for 'Date Advance', 'Beth Profile', 'Auto-Rate', and 'Auto-Ship'. The 'Ship To' section shows a verified address: 'TEST DO NOT SHIP, 1498 EDGEWOOD RD, BIRMINGHAM, MI 48009-3632 US'. The 'SHIP METHOD' is set to 'U11: UPS® Ground'. A red arrow points to the 'Package 1' dropdown menu, which is currently set to 'TEST Box B'. The dropdown menu is open, showing options: 'FedEx Pak', '6x6x6', 'BLZTEST', 'TEST Box A', 'TEST Box B' (highlighted), 'TEST Box C', and 'FEDEXDEFAULT'. To the right of the packaging dropdown, there are input fields for 'VALUE (USD)' (\$0.00) and 'DIMENSIONS (IN)' (8.0000, 8.0000, 8.0000).

DesktopShipper Bulk Update window

The screenshot shows the DesktopShipper Bulk Update window. It displays '1 orders selected'. A red arrow points to the 'Packaging' dropdown menu, which is currently set to 'TEST Box B'. The dropdown menu is open, showing options: 'FedEx Pak', '6x6x6', 'BLZTEST', 'TEST Box A', 'TEST Box B' (highlighted), 'TEST Box C', and 'FEDEXDEFAULT'. Below the dropdown menu, there is a text box that reads: 'Selected Packaging will ALWAYS force its dimensions and add its weight onto the content weight of the package.'

Note that the packaging drop-down does not appear on the Fields window. Only dimensions can be added.

Using Assigned Package Weight to Modify Order Weight

If a custom box in DS Cloud has a weight assigned to it, this can be added to the original order weight to create a new Total Weight

Sample order with an original order weight of 1 lb.

ORDER ID: 102790 | SOURCE: | MARKET ID: TJATEST2 | SHIP METHOD: U11

Details | Fields | Line Items 1 | Packages 0 | Notes 0 | Tags 0

CARRIER: .

CLASS: .

SHIP METHOD: U11: UPS® Ground

RETURN SERVICE: .

WEIGHT (LB): 1.0

DIMENSIONS (IN):

STATUS: New

PROFILE: Beth Profile

Save

Test box with dimensions of 8x6x4 and an assigned weight of 0.75 lbs.

		TEST	TEST Box	8	6	4	0.8
--	--	------	----------	---	---	---	-----

Note: Incoming Order weight plus assigned packaging weight is used in this example. Use of a scale weight or a manually entered weight would override the weight shown here.

Using Assigned Package Weight to Modify Order Weight

Example Order

Shipping window showing order with no packaging applied and an order weight of 1 lb.

Shipping window showing that the packaging dims and weight have been added to the order weight of 1 lb and the new total weight is now 1.75 lbs.

Order ID 102790 | Beth Profile | Date Advance | Auto-Ship

Ship To: TEST DO NOT SHIP, 1498 EDGEWOOD RD, BIRMINGHAM, MI 48009-3632 US (VERIFIED)

From: BIRMINGHAM, MI 48009-3632 US

Return:

* SHIP METHOD: U11: UPS® Ground | Package 1 of 1

PACKAGING: Not Specified

VALUE (USD)	* LBS	* OZ	LENGTH (IN)	WIDTH (IN)	HEIGHT (IN)
\$0.00	1	0	0.00	0.00	0.00

Manage Package Items | Manage Customs

• Endulge Chocolate Peanut Candies 1.2 Oz (5 Count) by SKU 112885 | 0.0 QTY 3 \$0.00

Package 1 of 1 | UPS | Special Services →

UPS | U11 UPS® Ground | ACC # 33R22X | TRAN 4 days | \$17.07

Original rate of \$17.07 with no DIMS applied

Order ID 102790 | Beth Profile | Date Advance | Auto-Ship

Ship To: TEST DO NOT SHIP, 1498 EDGEWOOD RD, BIRMINGHAM, MI 48009-3632 US (VERIFIED)

From: BIRMINGHAM, MI 48009-3632 US

Return:

* SHIP METHOD: U11: UPS® Ground | Package 1 of 1

PACKAGING: TEST Box

VALUE (USD)	* LBS	* OZ	LENGTH (IN)	WIDTH (IN)	HEIGHT (IN)
\$0.00	1	12	8.00	6.00	4.00

Manage Package Items | Manage Customs

• Endulge Chocolate Peanut Candies 1.2 Oz (5 Count) by SKU 112885 | 0.0 QTY 3 \$0.00

Package 1 of 1 | UPS | Special Services →

UPS | U11 UPS® Ground | ACC # 33R22X | TRAN 4 days | \$18.82

Updated rate (\$18.82) with packaging weight and dims applied

Assigning Packaging to a SKU

Packaging can be added to product skus that are stored in DS Cloud:

- Assigned packaging will be automatically applied when an order contains the linked sku
- When a single line item order is shipped, DesktopShipper will use any assigned packaging with that sku.
- If the packaging has assigned weight, it will be added to the order weight.
- If the product sku has a Carton Weight, that will be used as the Total Weight.
- Carton weight can be set up to cover multiple quantity orders

The screenshot displays the 'Products' management interface in DS Cloud. On the left, a list of SKUs is shown, with '112886' selected and highlighted. A blue callout box with the text 'Product sku selected in DS Cloud' and an orange arrow points to this selection. The main content area is titled 'Packaging for Product Sku: 112886' and features a table with the following columns: 'Remove', 'Box', 'Quantity', 'Carton Weight(LB)', 'Original Carrier Service', and 'Override Carrier Service'. A single row is present with a trash icon, the box name 'TEST: TEST Box', a quantity of '1', a carton weight of '0.000', and 'None' for both carrier services. An orange arrow points from a blue callout box 'Custom packaging assigned to sku' to this row. Below the table, the 'Settings for Product Sku: 112886' section includes an 'Editable Field' checkbox (checked), a 'CSV Automation' button, and a 'CSV Automation' section with a 'Currently Used' status and a 'Marketplace' link. At the bottom, the product title 'Endulge Candy Bars Chocolate Candies, 5 oz by' is visible. 'Add' and 'Save' buttons are located in the top right corner of the packaging section, and an 'Edit' button is in the top right of the settings section.

Product sku
selected in
DS Cloud

Custom packaging
assigned to sku

Using Packaging Carton Weight

A product sku with assigned packaging can be given a Carton Weight to represent the Total weight of the product plus the box it will be shipped in.

- This can be useful when items are consistently shipped in the same external packaging.
- Assigned packaging will be automatically applied when an order contains the linked sku
- Assigned packaging can be based on how many of a single product sku are being shipped.

Example: An order with quantity 1 or 2 may ship in box A. But an order of 3-5 may require box B, and an order with a quantity of over 5 may require box C.

Example of product sku using assigned packaging and Carton Weights

Packaging for Product Sku: 112885							Add	Save
Remove	Box	Quantity	Carton Weight(LB)	Original Carrier Service	Override Carrier Service			
	Box A: TEST Box A	1	0.300	None	None			
	Box A: TEST Box A	2	0.350	None	None			
	Box B: TEST Box B	3	0.550	None	None			
	Box B: TEST Box B	4	0.600	None	None			
	Box B: TEST Box B	5	0.650	None	None			
	Box C: TEST Box C	6	0.800	None	None			

Using Packaging Carton Weight

Example of product sku using assigned packaging and Carton Weights.

This shows how different packaging can be applied based on the quantity of a single line item sku.

Order with qty 1 and carton weight

Ship To TEST DO NOT SHIP 1498 EDGEWOOD DR BIRMINGHAM, MI 48009-3632 US VERIFIED

From BIRMINGHAM, MI 48009-3632 US

Return

* SHIP METHOD
Standard Svc

Package 1 of 1

PACKAGING
TEST Box A

REFERENCES
• 2 • 0 • 0

VALUE (USD)	* WEIGHT (LB)	LENGTH (IN)	WIDTH (IN)	HEIGHT (IN)
\$0.00	0.30	4.00	4.00	4.00

Manage Package Items

• Endulge
112885 # 1 0.0 \$0.00

Order with same sku but qty 3

Ship To TEST DO NOT SHIP 1498 EDGEWOOD RD BIRMINGHAM, MI 48009-3632 US VERIFIED

From BIRMINGHAM, MI 48009-3632 US

Return

* SHIP METHOD
U11: UPS® Ground

Package 1 of 1

PACKAGING
TEST Box B

REFERENCES
• 2 • 0 • 0

VALUE (USD)	* WEIGHT (LB)	LENGTH (IN)	WIDTH (IN)	HEIGHT (IN)
\$0.00	0.55	8.00	8.00	8.00

Manage Package Items

• Endulge Chocolate Peanut Candies 1.2 Oz (5 Count) by
112885 # 3 0.0 \$0.00

Carrier Specific Packaging

Some carrier services are tied to specific package types provided by the carrier.

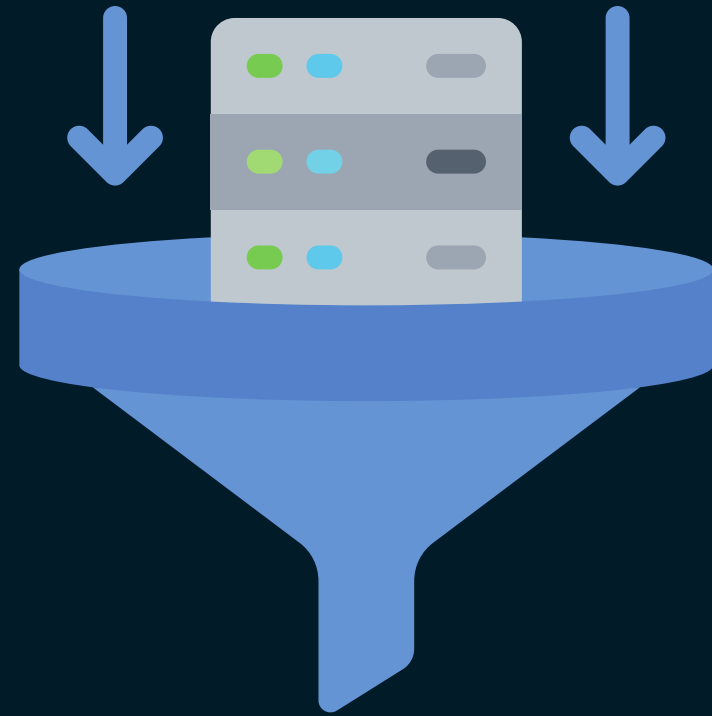
- Services may have special flat rate pricing but require the use of carrier packaging to qualify.
 - *Examples: USPS Priority Mail boxes and envelopes, UPS Express boxes, FedEx One Rate services*
- Carrier specific packaging is built into DS Cloud and is available to add to a shipment through the drop-down lists
- FedEx One Rate requires that packages within a specific range of dims be used. It will not return the One Rate pricing without the packaging.
- Customers using FedEx One Rate will typically create custom carrier codes in DS Cloud using the FedEx packaging as the service default. This will apply the package type each time the service is used for a shipment.



Processing Orders

shipv2.desktopshipper.com





Actions for Processing Your Orders

Searching for Orders

Using the Filters

Rating

Shipping

Searching on the Orders Page

shipv2.desktopshipper.com



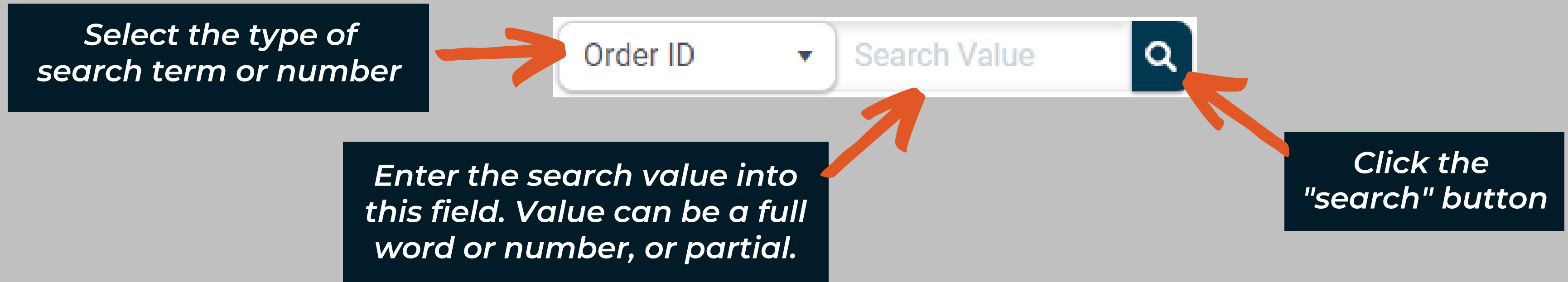


This section covers the process of searching for orders and batches on the Orders Page



Orders Page Search

To perform a search for an order or orders on the Orders page, use the search bar.



Several search term types are available:

- Market ID - order number used by integration
- Order ID - internal DS Cloud order number
- Department - usually the code or name of a customer's fulfillment client
- Customer - contact name of the customer.
- Tracking ID - a tracking number
- Custom ID - sometimes an internal fulfillment company
- Reference ID - example would be a Purchase Order
- Ship Method - the method the order was shipped with or is intended to be shipped with
- Batch ID - an internal batch number

Batches Page Search

To perform a search for a single batch or multiple batches, on the batches page, use the search bar.

Enter the batch number or name or partial name of a batch you wish to search for.

Click the "search" button



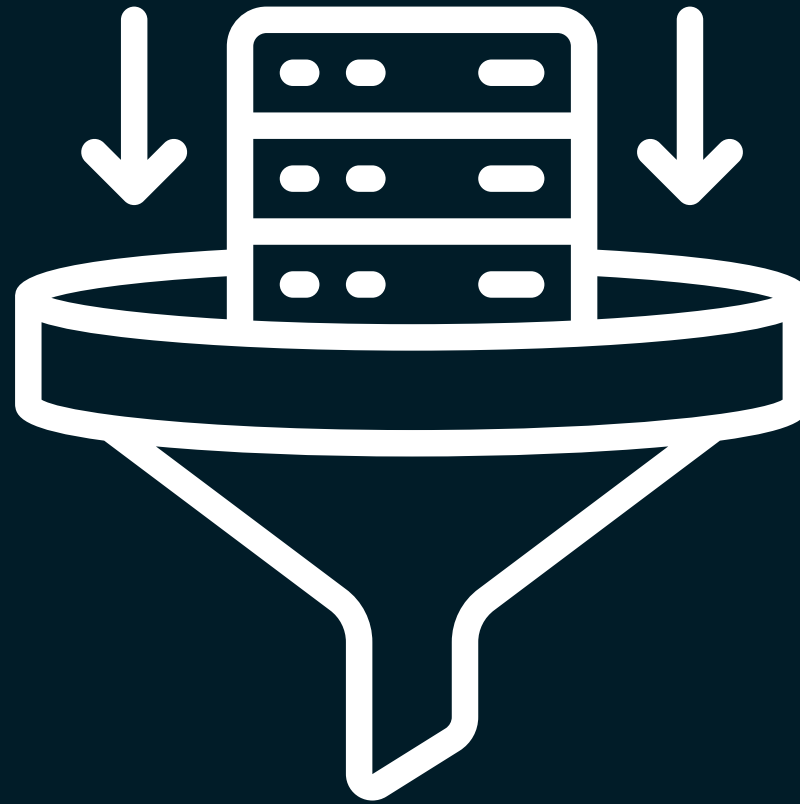
Batch ID or Name...

The image shows a search bar with a white background and a dark blue search button on the right. The search button contains a white magnifying glass icon. Two orange arrows point from the text boxes above to the search bar: one points to the input field, and the other points to the search button.

Using Filters

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**This section covers filtering orders,
shipments, and batches with**

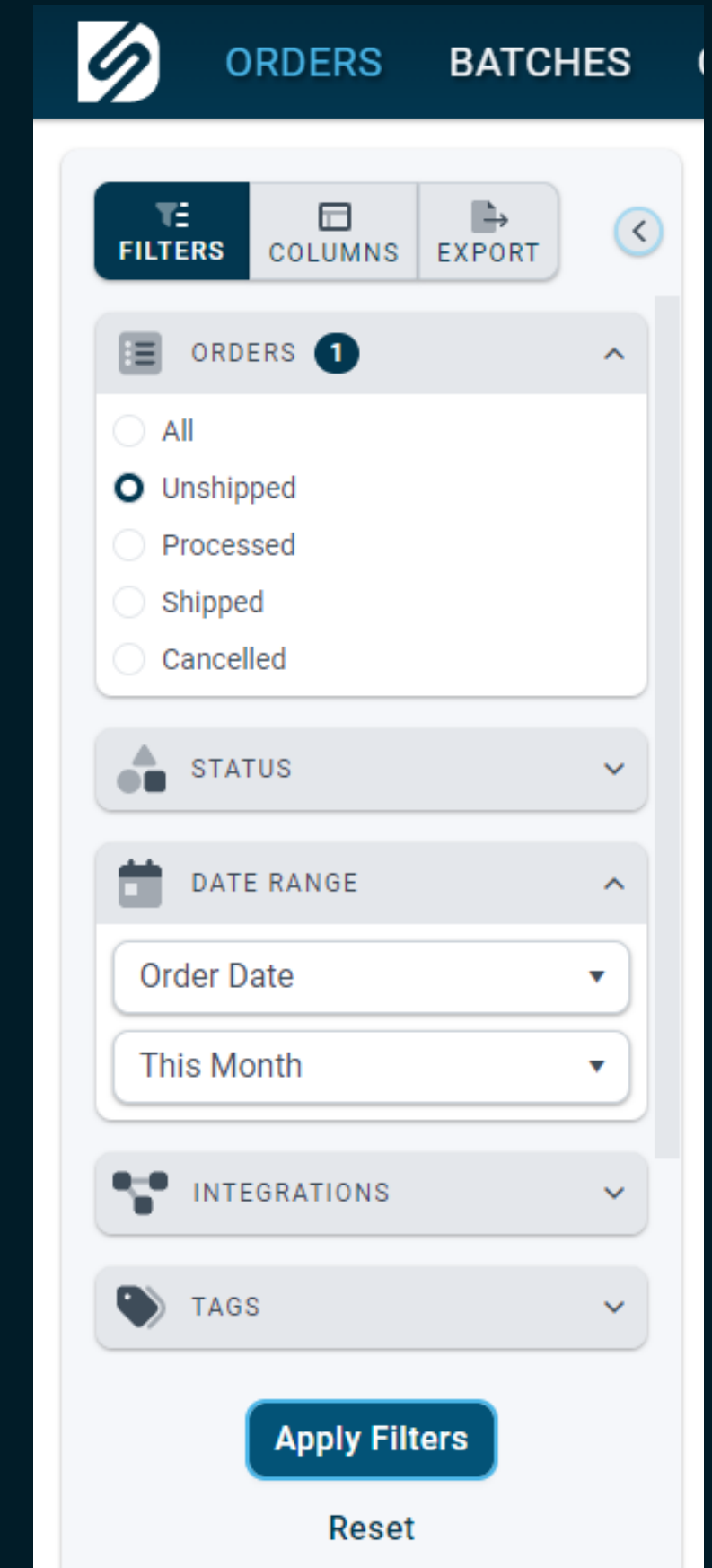


Filtering Overview for the ShipV2 Orders Page

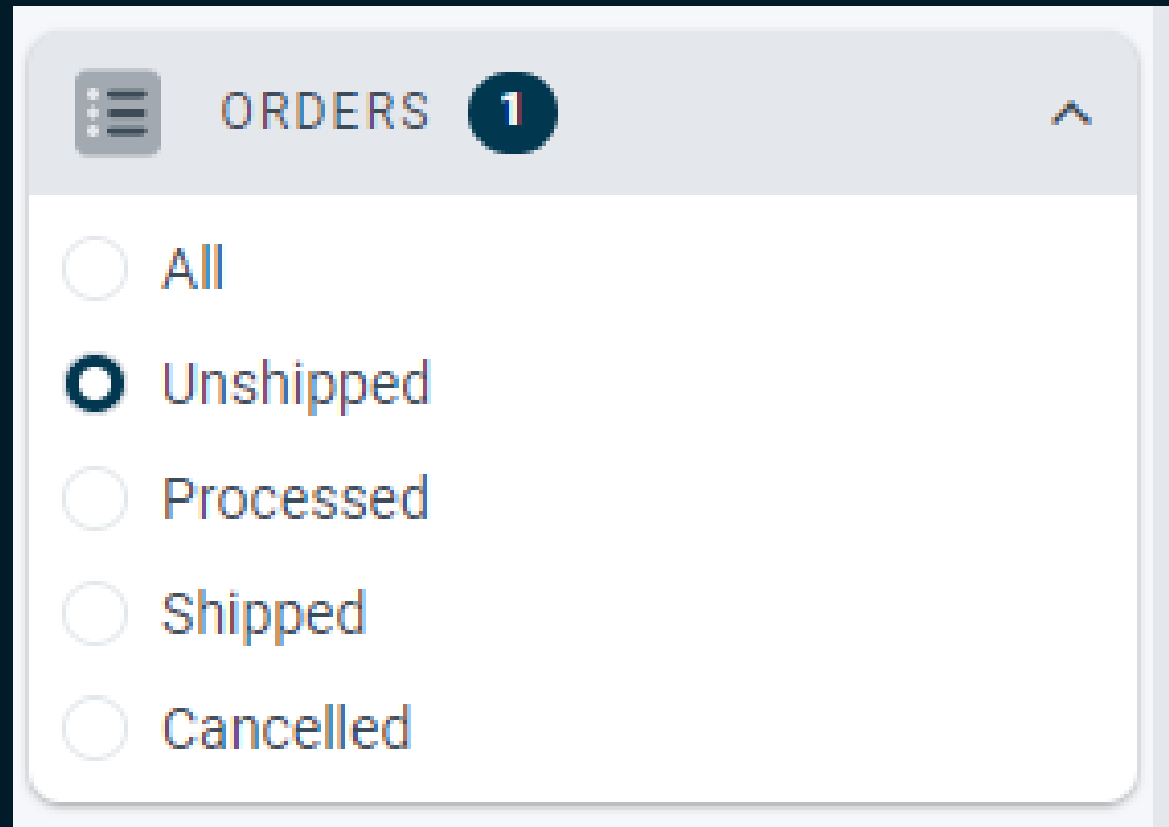
Filtering can be used in a variety of situations including shipping a single order, a group of orders or a batch of orders as well as locating several orders to create a batch.

Desktopshipper includes many filtering options to enable efficient processing of orders:

- **Order Status:** Filter the overall status of the orders, mainly if they have been shipped yet.
- **Processing Status**
- **Date Range**
- **Integrations:** filter by your order manager systems
- **Tags**
- **Print Status:** filter if the labels and packing slips have been printed or not.
- **Batches**
- **Dropshipped Orders**

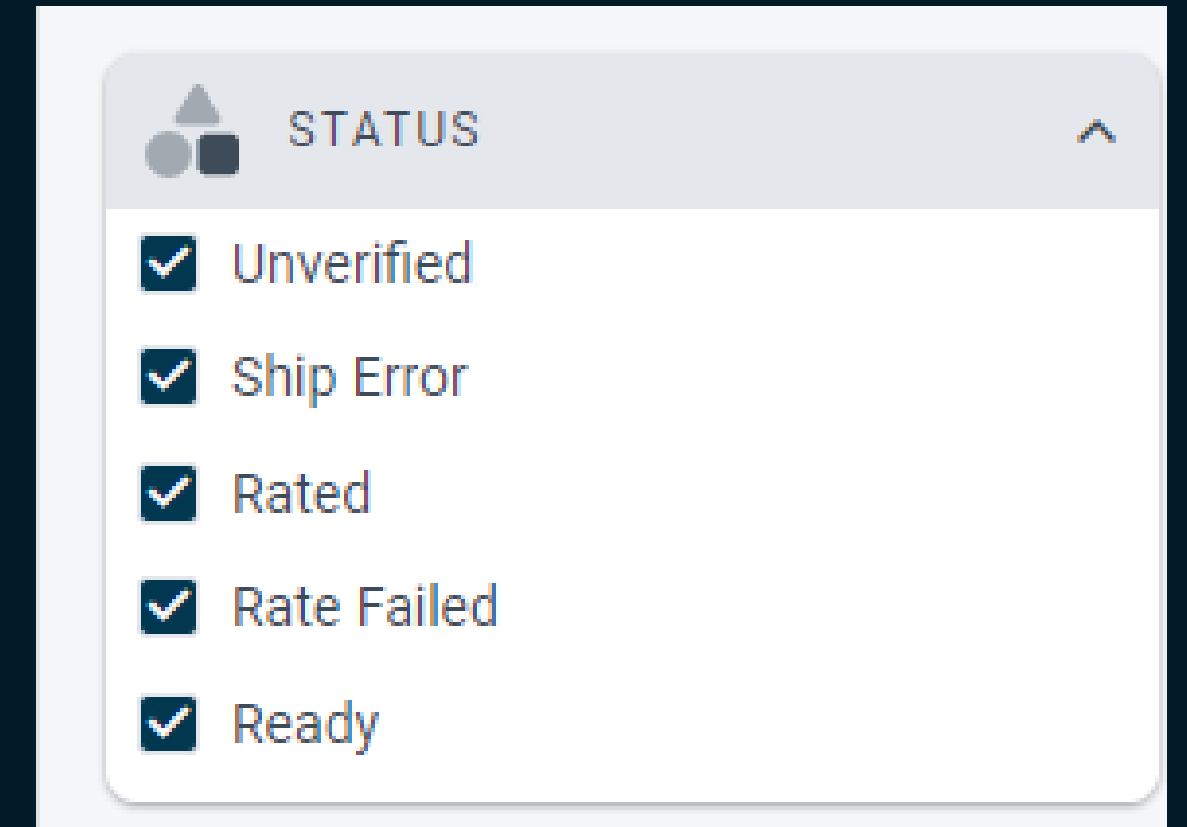
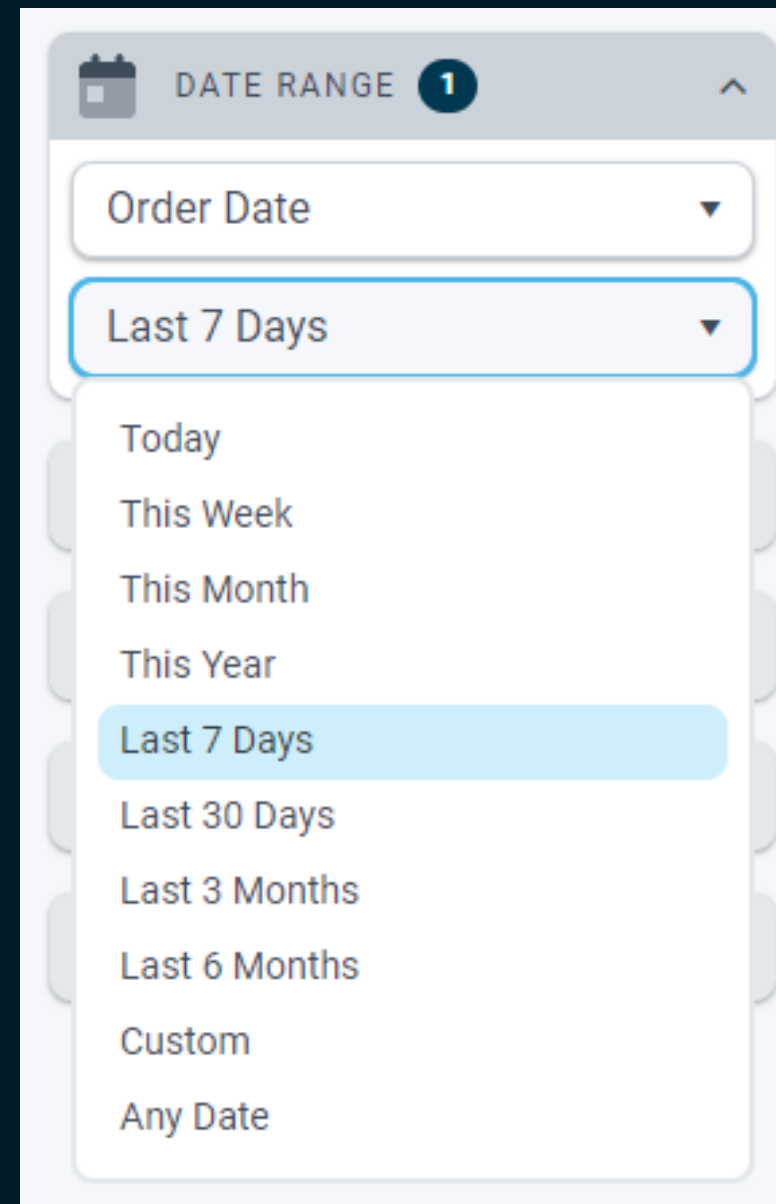


Filtering Options on the ShipV2 Orders Page



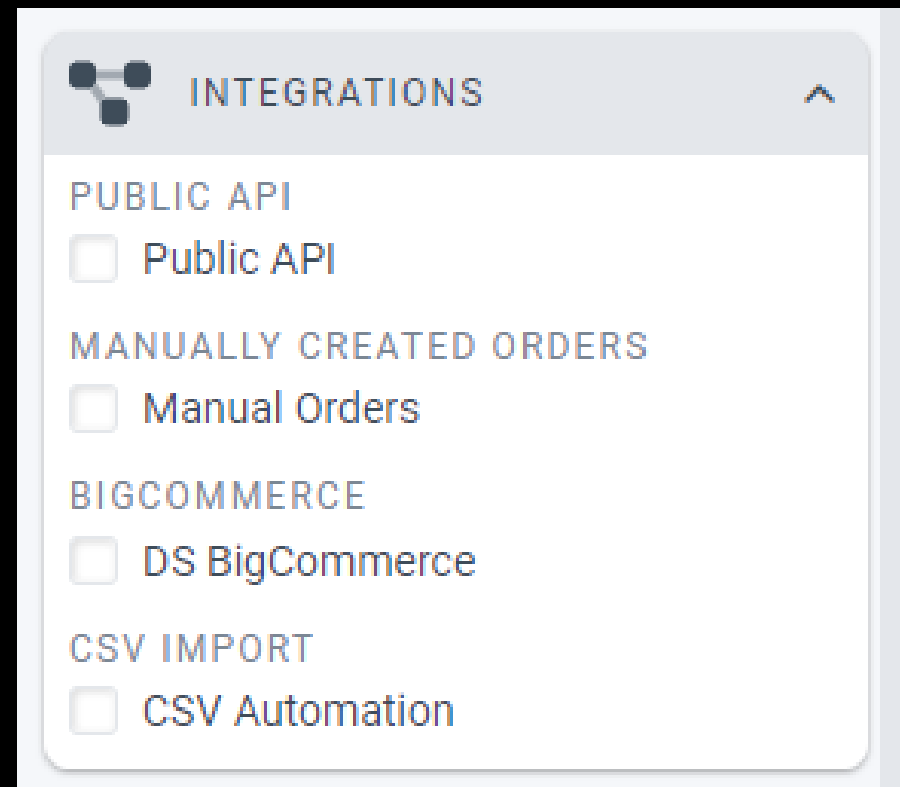
Orders can be filtered by their status group

Orders by Date type (Order date, Ship date, Deliver date, Shipped date) and Date Range

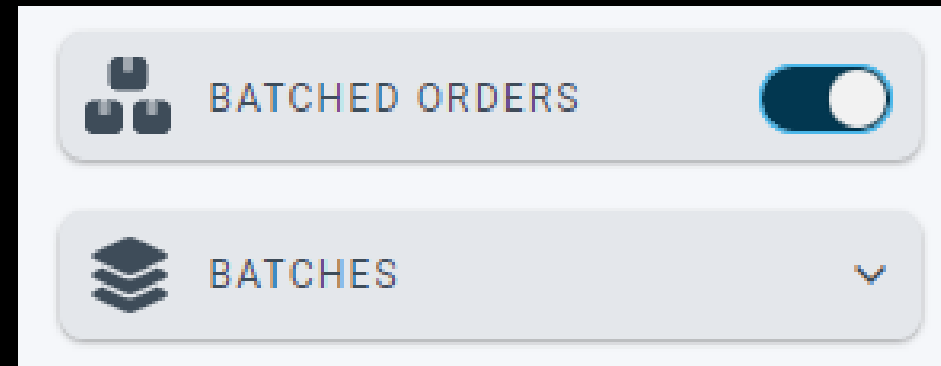


Orders can be filtered by their processing status.

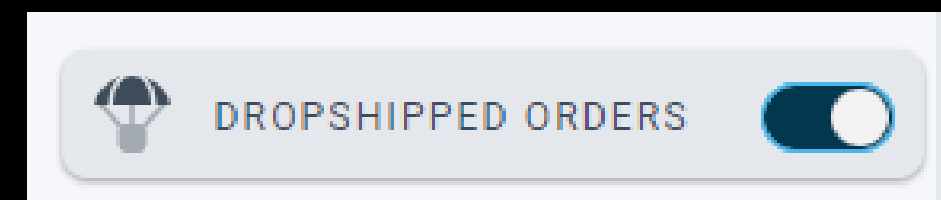
Filtering options on the ShipV2 Orders page (continued)



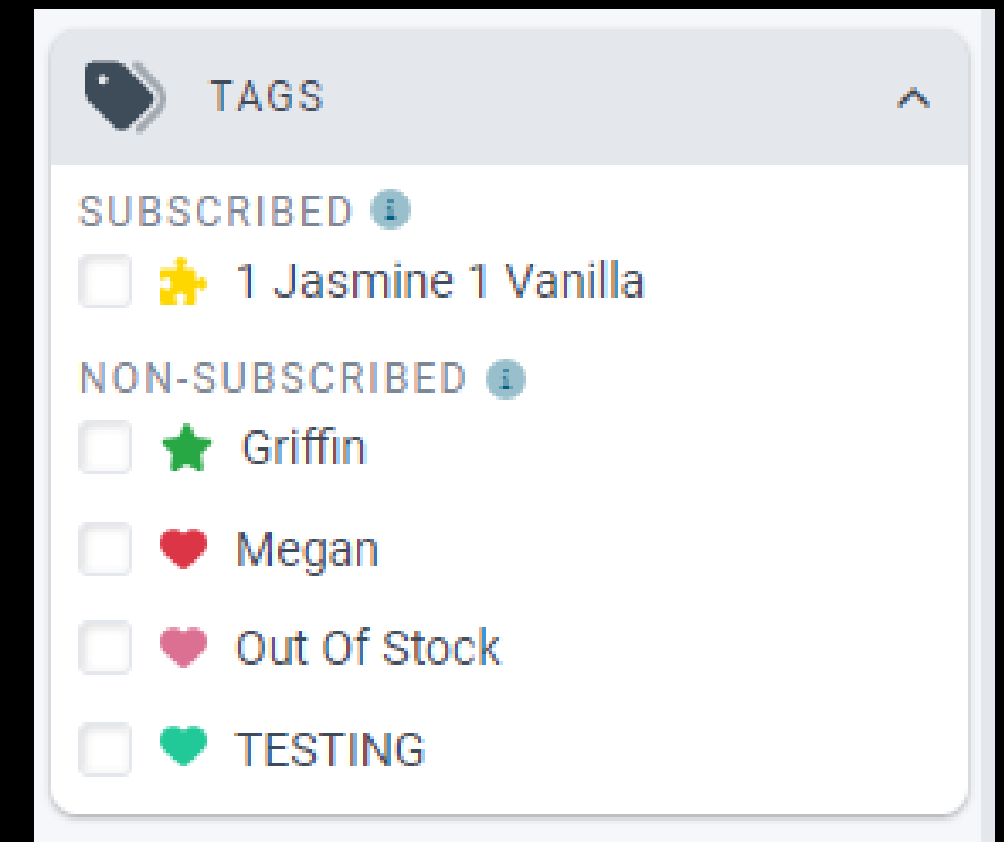
Orders can be filtered by the parent integration.



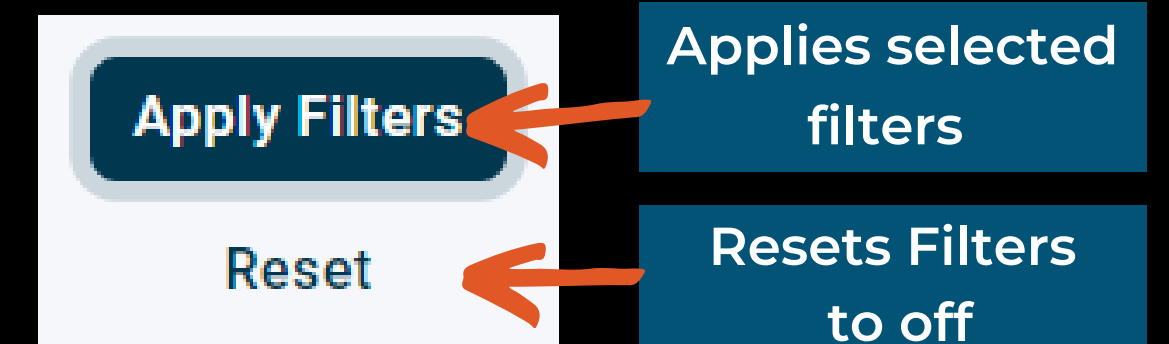
This slide toggle will filter whether batched orders are included in the Orders view grid or not.



This toggle will filter whether orders marked as drop-shipped are included in the orders grid



Tags can be applied to group like orders together and orders can be filtered using these applied tags.



Applies selected filters

Resets Filters to off

Example of Order Filtering on the ShipV2 Orders Page

ORDERS BATCHES CSV SHIPMENTS END OF DAY SETTINGS

Training and Documentation 10001734

FILTERS COLUMNS EXPORT

Order ID Search Value

Create Orders

Rate Ship Packing Slip Bulk Update

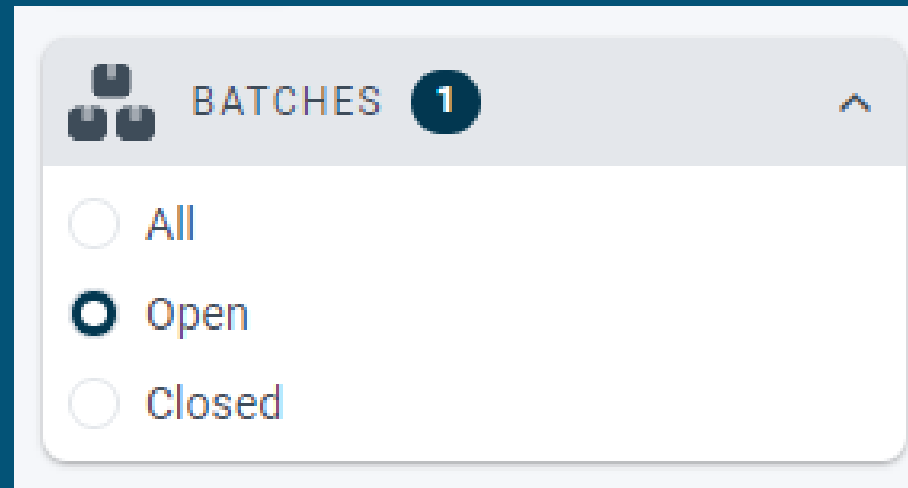
	ORDER ID	SOURCE	MARKET ID	SHIP METHOD	SERVICE	RAT
▶	102682	Ready	134	None		
▶	102749	Ready	136	U11		
▶	102750	Ready	137	U11		
▶	102751	Ready	138	U11		
▶	102753	Ready	139	U11		
▶	102754	Ready	140	U11		
▶	102755	Ready	141	U11		
▶	102756	Ready	142	U11		
▶	102757	Ready	143	U11		

Apply Filters Reset Adv Search

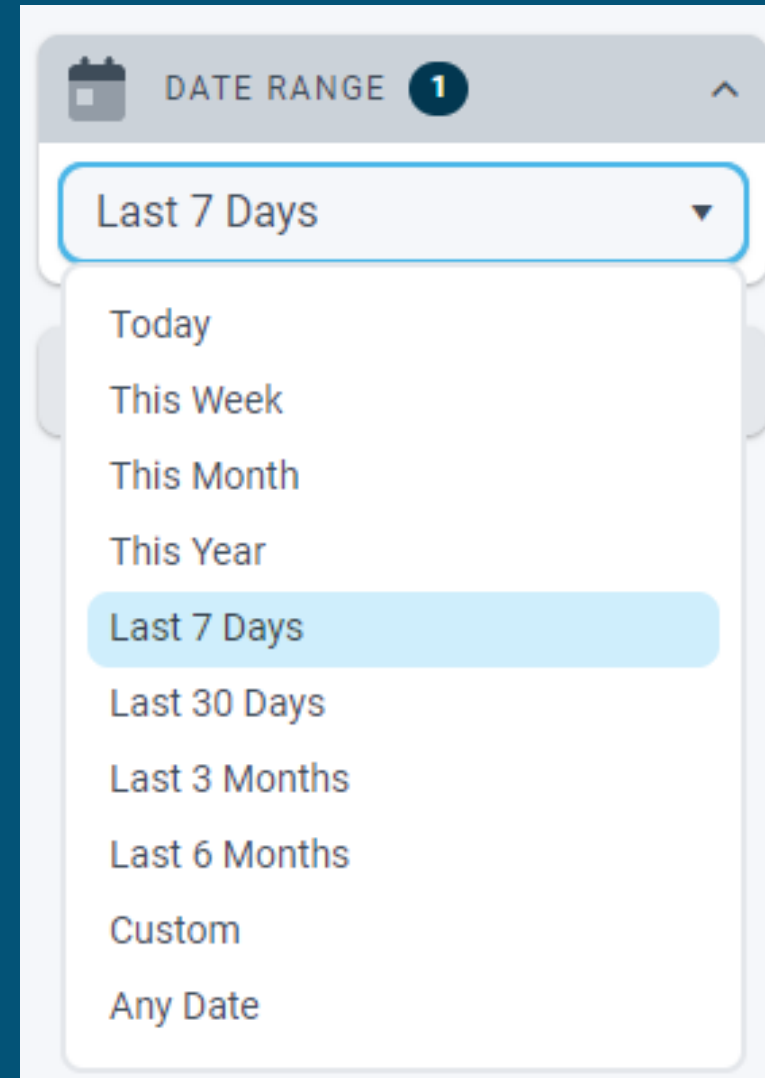
25 items per page 1 - 12 of 12 items

This example shows the same Orders grid but with the additional filters of "Ready" status orders and "Big Commerce" integration orders applied.

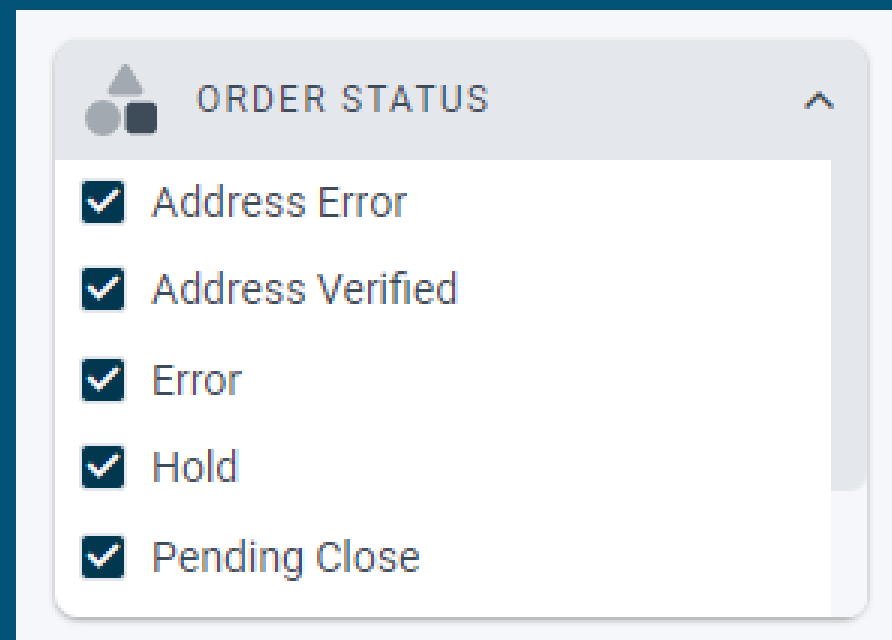
Filtering Options on the ShipV2 Batches Page



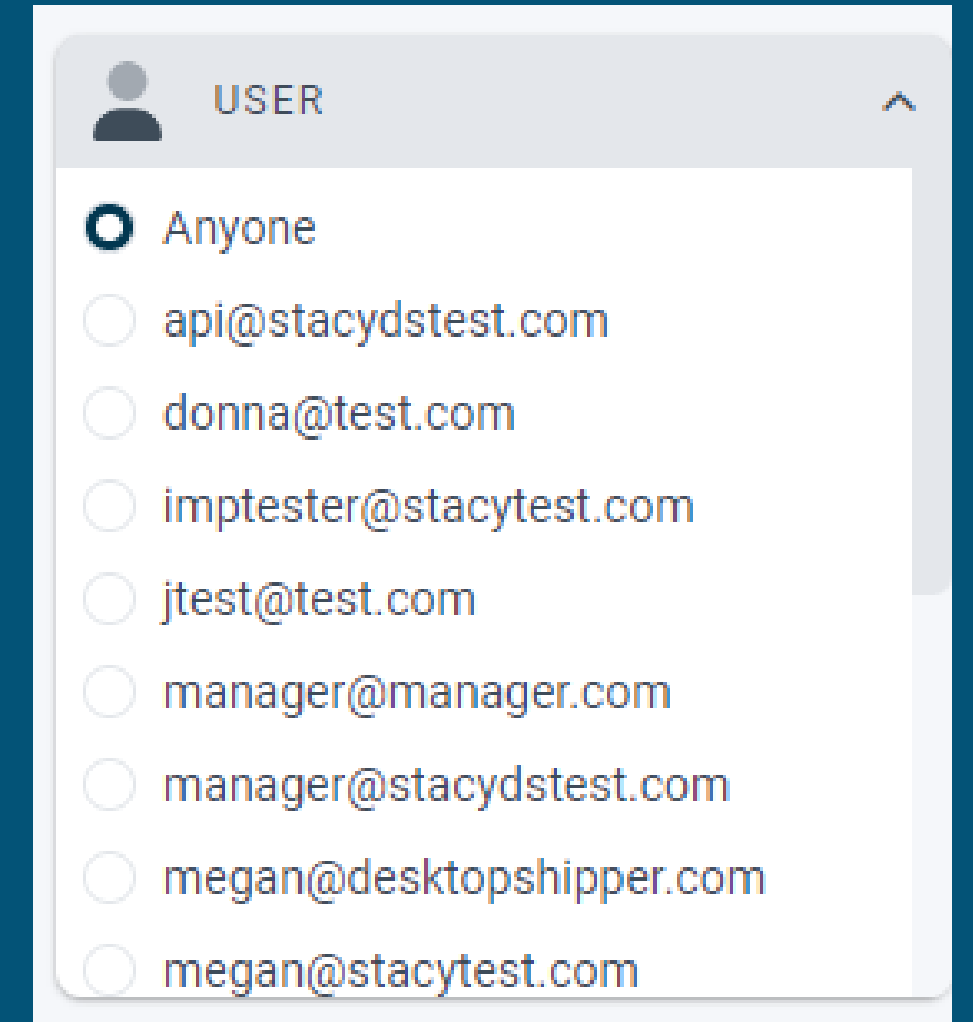
Batches can be filtered by status



Date Range filters



Batches can be filtered by order status



When Batches are created they can be assigned to specific users. This allows filtering of created batches by the user they are assigned to.



Rating and Shipping

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This section covers the process of rating and shipping orders on the Orders Page



Rating and Shipping on the ShipV2 Orders Page

After searching for and/or filtering the orders grid on the Orders Page, you can rate and ship orders using there are 3 methods of rating unshipped orders:



Click It & Ship it



Quick Ship



Scan and Print



Click It & Ship It



ORDERS BATCHES CSV SHIPMENTS END OF DAY SETTINGS

Order ID Search Value

7 Orders

	ORDER ID	SOURCE	MARKET ID	SHIP METHOD
<input checked="" type="checkbox"/>	Ready 104208		testt	F11ORSP
<input type="checkbox"/>	Ready 104209		testing	U07
<input type="checkbox"/>	Ready 104210		testing1	T03
<input type="checkbox"/>	Ready 104244		MEGANTEST107	STANDARD
<input type="checkbox"/>	Ready 104312		153	None
			154	None
			155	None

To use the Click it & Ship It method of rating and shipping, click on the row of the order you wish to ship.

This action will open the Shipping module window

Order ID 104208 Meggie's

Notes testt Today Auto-Ship

Ship To PETER OLESEN VERIFIED 16981 TIMBERLAKES DR 09/27/2022 10:04 PM
From FORT MYERS, FL 33908-5323 US SHIP BY
Return 2629772802 8/17/2022 5:00 PM
DELIVER BY

* SHIP METHOD
F11: FedEx 2Day Package 1 of 1

PACKAGING Not Specified *LBS 1 *OZ 8 VALUE (USD) \$3.00

REFERENCES testt 220(1) CAT3(1) NPB1(1) LENGTH (IN) 10.00 WIDTH (IN) 5.00 HEIGHT (IN) 14.00

Manage Package Items Manage Customs

Package 1 of 1 FedEx
FedEx 2Day ACC 251062577 TRAN 2 days ZN 08 Special Services
Express #: 390926723 \$89.89

Item Summary Total \$89.89
1 FedEx 2Day \$89.89

BILL TRANSPORTATION TO Prepaid BILL DUTIES/TAXES TO Sender

(This user is in TEST MODE) Clear Rate Rate Ship

The order will automatically rate. If the shipping rate looks acceptable, click the "Ship" to process the order.



Quick Ship



Select the order(s) you want to rate and ship.

Click the "Rate" button

ORDERS BATCHES CSV SHIPMENTS END OF DAY SETTINGS

Order ID Search Value

7 Orders

	ORDER ID	SOURCE	MARKET ID	SHIP METHOD	SERVICE
<input checked="" type="checkbox"/>	104208		testt	F11ORSP	
<input checked="" type="checkbox"/>	104209		testing	U07	

Rate ³

If everything is good with the order's info, the status will change to "Rated" and the order will display the best rate

Click "Ship" to process the rated orders and print the labels

Orders

Rate ¹ Ship ¹ Clear Rates ¹ Packing Slip ¹

	ORDER ID	SOURCE	MARKET ID	SHIP METHOD	SERVICE
<input checked="" type="checkbox"/>	103866		AUG22-28	Zero	\$124.09: FedEx Standard Overnight®
<input type="checkbox"/>	103939		ETHANTRAINING-01	F11	

If there is an issue with the order's info or rating system, the order's status will change to "Error". Clicking the status will display the error.

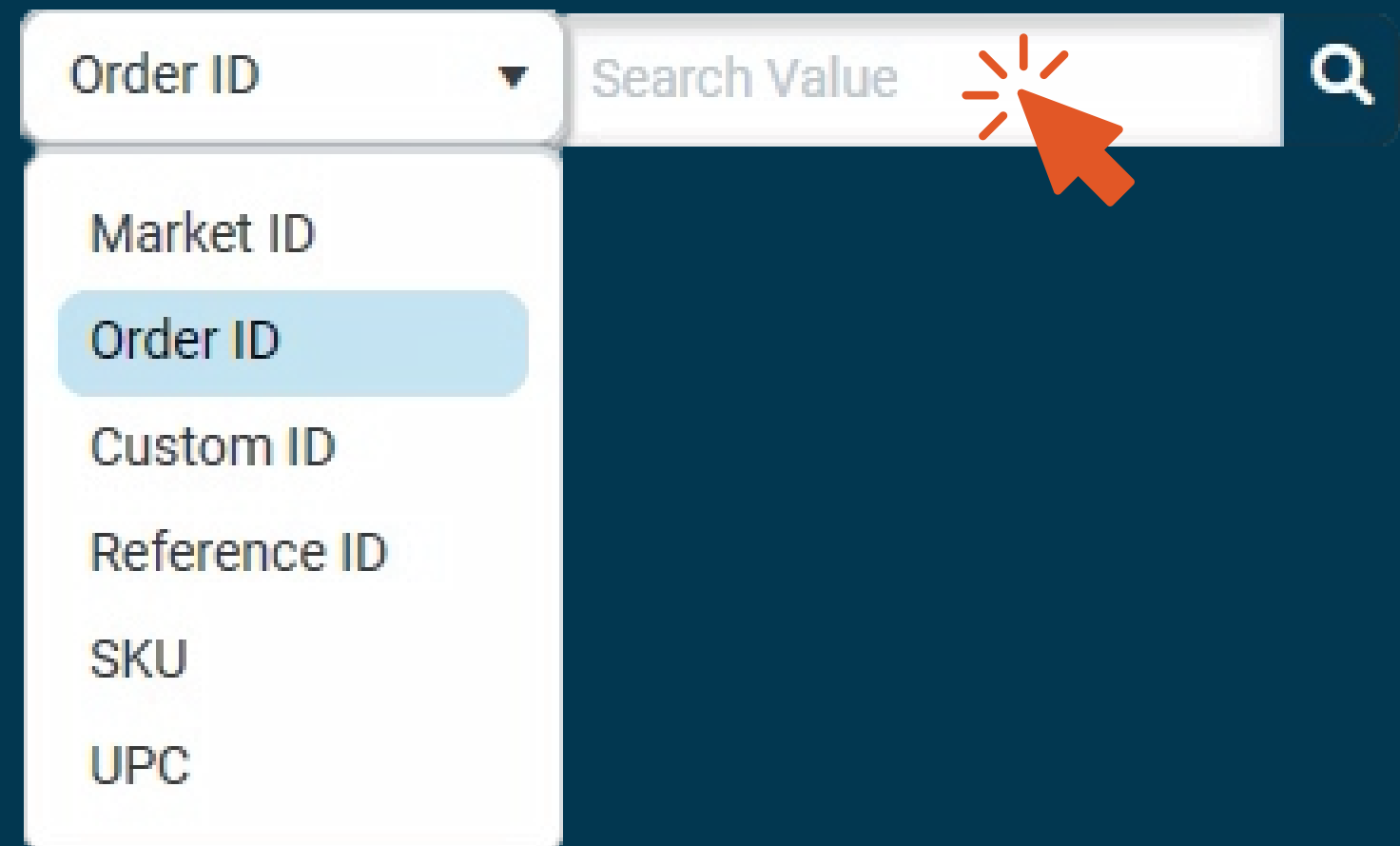
Step One:

At the top right of the Orders Page, click the "Scan and Print" button.



Step Two:

- Select the value option that the bar code represents...
- Click into the "Search Value" field...
- Scan your barcode





Scan & Print



Step Three:

After scanning the barcode, the shipping window will appear and automatically rate the scanned in order.

Step Four:

Click

Ship

Order ID 103542 Meggie's
MEGAN1234 Today Auto-Ship

Order Notes [Add Note](#)

Addresses and Dates

Ship To MEGGIES BOUTIQUE TEST VERIFIED [Add](#) [Edit](#)

From 8121 SE CYPRESS AVE
MELBOURNE, OR 97067-5410 US

Return 5033314000
megan@desktopshipper.com

ORDERED
• 07/25/2022 6:19 PM
SHIP BY
• 7/25/2022 11:19 AM
DELIVER BY
• 7/25/2022 11:19 AM

Packages and Items

* SHIP METHOD STANDARD Package 1 of 1

PACKAGING	* LBS	* OZ	VALUE (USD)
Not Specified	1	0	\$1.00

REFERENCES	LENGTH (IN)	WIDTH (IN)	HEIGHT (IN)
•	0.00	0.00	0.00

[Manage Package Items](#) [Manage Customs](#) [Alert](#) [More](#)

1 test
SKU test LBS 1.0 \$0.00

Package 1 of 1 **FedEx** **UPS** [Error Rates](#)

UPS® Ground ACC **TRAN 1 day** **\$16.66**

Special Services

SIGNATURE OPTIONS Signature Required

INSURANCE OPTIONS DesktopShipper Insur... \$1.00

Shipment Summary Total **\$16.66**

• 1 **UPS® Ground** **\$16.66**

Billing Options

BILL TRANSPORTATION TO Prepaid BILL DUTIES/TAXES TO Sender

Label (This user is in TEST MODE) Clear Rate [Rate](#) [Ship](#)





After Shipping Actions

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Actions you can take after shipping orders:

Searching for Orders on the Shipments Page

Reprinting Postage Labels

Voiding Shipments

Searching on the Shipments Page

shipv2.desktopshipper.com



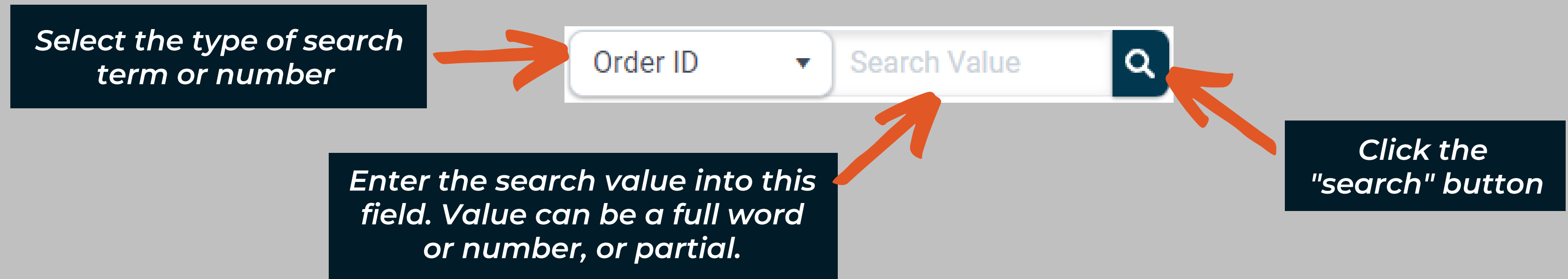


**This section covers the process of searching
for orders on the Shipments Page**



Shipments Page Search

To perform a search for a shipment or shipments on the Shipments Page, use the search bar.



Several search term types are available:

- Package ID - order number generated when recorded in the shipment database.
- Order ID - original order identifier stored when order was imported into the order database.
- Department - usually the code or name of a customer's fulfillment client.
- Batch ID - an internal batch number
- Contact - contact name of the shipment recipient.
- Company - company name of the shipment recipient.
- Reference 1, 2, & 3 - order reference fields
- Tracking Number - the shipment's tracking number.
- DIMs - search for values in the Length, Width and Height of a shipment.

Reprinting Labels

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TRAINING



This section covers the process of reprinting postage or packing slips labels



Example of Reasons For Reprinting Labels



- A shipment processed, however, the designated label printer was offline and did not initially print the labels.
- The shipping label printed but was physically damaged after printing and could not be utilized for the package.
- If needed, a reprinted label can be utilized as proof of shipment after the package has been tendered to the carrier.

Reprinting Labels - Orders Page

Method of Reprinting Labels on the Orders Page

- 1) Search for and/or select a shipped order.
- 2) Expand the order
- 3) Click on the Packages tab
- 4) Click the Print icon to reprint the label.

The screenshot illustrates the process of reprinting a label on the Orders Page. It features a sidebar on the left with filter options and a main content area on the right displaying order details and package information. Red circles with numbers 1 through 4 and arrows indicate the sequence of actions:

- 1**: Points to the 'Shipped' filter option in the sidebar.
- 2**: Points to the expand/collapse icon for the selected order.
- 3**: Points to the 'Packages' tab in the order details section.
- 4**: Points to the 'Print' button in the package details table.

The interface includes a search bar at the top right, a sidebar with 'FILTERS', 'COLUMNS', and 'EXPORT' options, and a main area with a table of orders. The selected order (ID 102846) is shown as 'Shipped' and expanded to show package details.

ORDER ID	SOURCE	MARKET ID
<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/> Shipped 102846		TJATEST1

Details Fields Line Items **1** Packages **1** Notes **0** Tags **0**

Add Package [Shipments](#)

PACKAGE ID	STATUS	CARTON COST
102846	Active Void	Print

Reprinting Labels - Shipments Page

Method of Reprinting Labels on the Shipments Page

- 1) Navigate to the Shipments page.
- 2) Select "All" orders
- 3) Search for and/or select a shipped order
- 4) After selecting the order the Print buttons will highlight and include the amount of selected orders.

The screenshot shows the 'SHIPMENTS' page in a software application. The navigation bar includes 'ORDERS', 'BATCHES', 'CSV', 'SHIPMENTS', 'END OF DAY', and 'SETTINGS'. A search bar is present with 'Package ID' and 'Search Value' fields. A sidebar on the left shows a 'STATUS' filter with options: Active, Void, Closed, and All. The main table displays shipment data with columns: PACKAGE ID, INT CODE, CARRIER, TRACKING NUMBER, TRACKING STATUS, CREATE DATE, and ACTUAL WEIGHT (LBS). A single shipment is shown with a 'Closed' status, Package ID 102846, and tracking number 1Z33R22X0392225319. Action buttons 'Void', 'Unvoid', 'Print', 'Labels', and 'Packing Slips' are visible above the table. Three callout boxes provide details for the 'Print', 'Labels', and 'Packing Slips' buttons. Red arrows and numbered circles (1, 2, 3) indicate the steps described in the text.

PACKAGE ID	INT CODE	CARRIER	TRACKING NUMBER	TRACKING STATUS	CREATE DATE	ACTUAL WEIGHT (LBS)
102846	U11	UPS® Ground	1Z33R22X0392225319	Unknown	04/18/2022	<1

Reprints the postage label and any associated packing slip

Reprints the postage label only

Reprints the packing slips only

Important Notes Regarding Label Reprinting

If the current user is assigned to a label printer, reprinting labels from DesktopShipper will print to the Print Utility queue then to an enabled label printer.

If the current user is **NOT** assigned to a label printer, reprinting labels from DesktopShipper will print to the open a new browser tab that contains all reprinted labels.*

Postage labels generated through the DesktopShippper can be reprinted for up for 21 days prior to the label's creation date.

*NOTE: If a new window does not open, the pop-up blocker may need to be disabled in your browser

Voiding Shipments

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TRAINING



This section covers the process of voiding shipments.



Purpose of Voiding Shipments

Occasionally you might run into a reason for cancelling a shipment you or a shipper processed. Voiding cancels the package label and flips an order status back to *"Ready"*, allowing you to ship the order again and generate a new label. The new postage label will contain a brand new tracking number as the voided tracking number will no longer be active.

Note: Voiding orders that have already been closed will not contact the carrier and remove it from the manifest file.



Voiding Requirements



The Order
must be in

Active

or

Closed

status

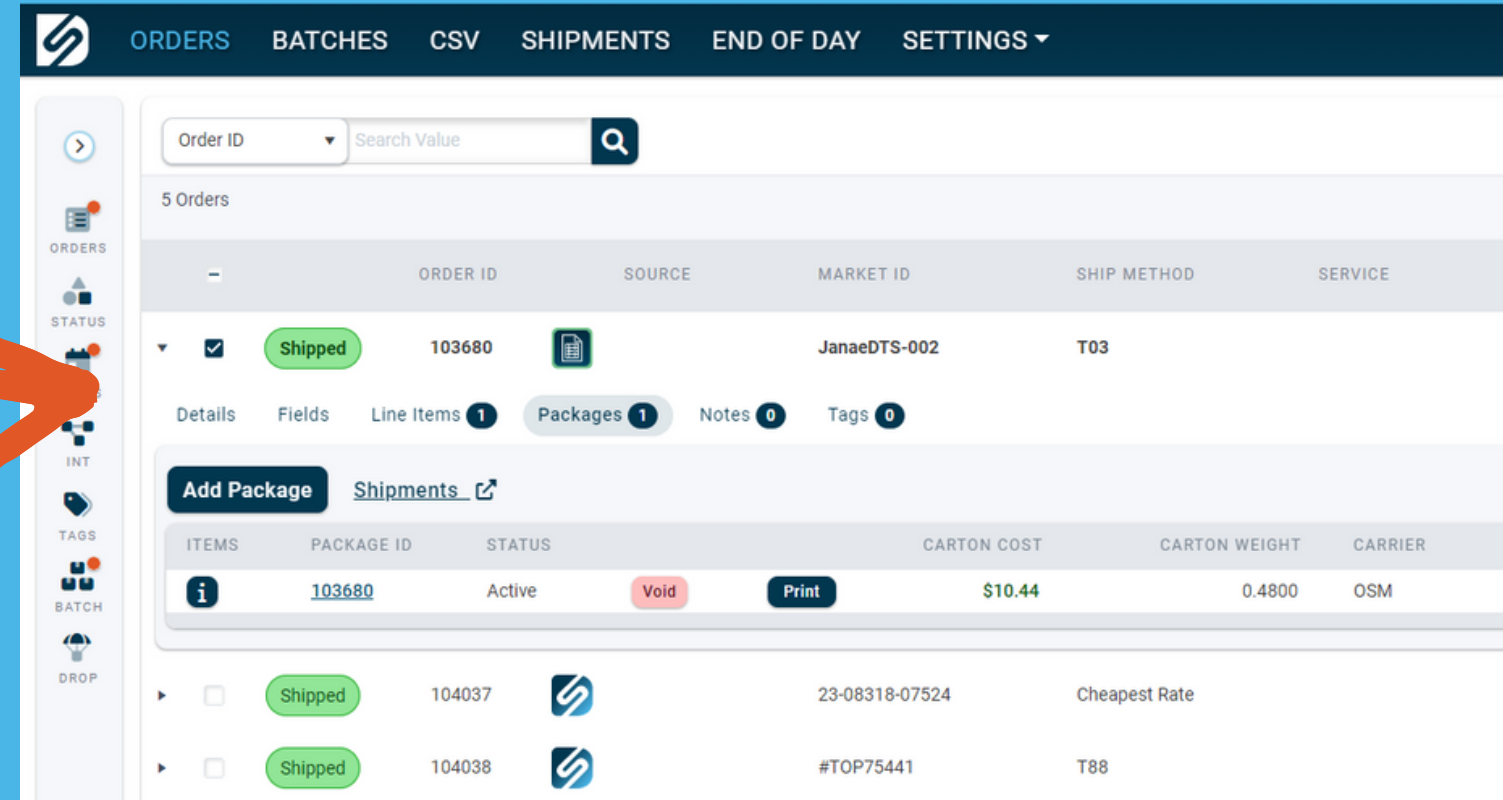


Minimal User
Permission level:

Shipper

Where can shipments be voided in DesktopShipper Ship V2?

Shipments can be voided from the **Orders** page



ORDERS BATCHES CSV SHIPMENTS END OF DAY SETTINGS

Order ID Search Value

5 Orders

	ORDER ID	SOURCE	MARKET ID	SHIP METHOD	SERVICE
<input checked="" type="checkbox"/>	103680		JanaeDTS-002	T03	

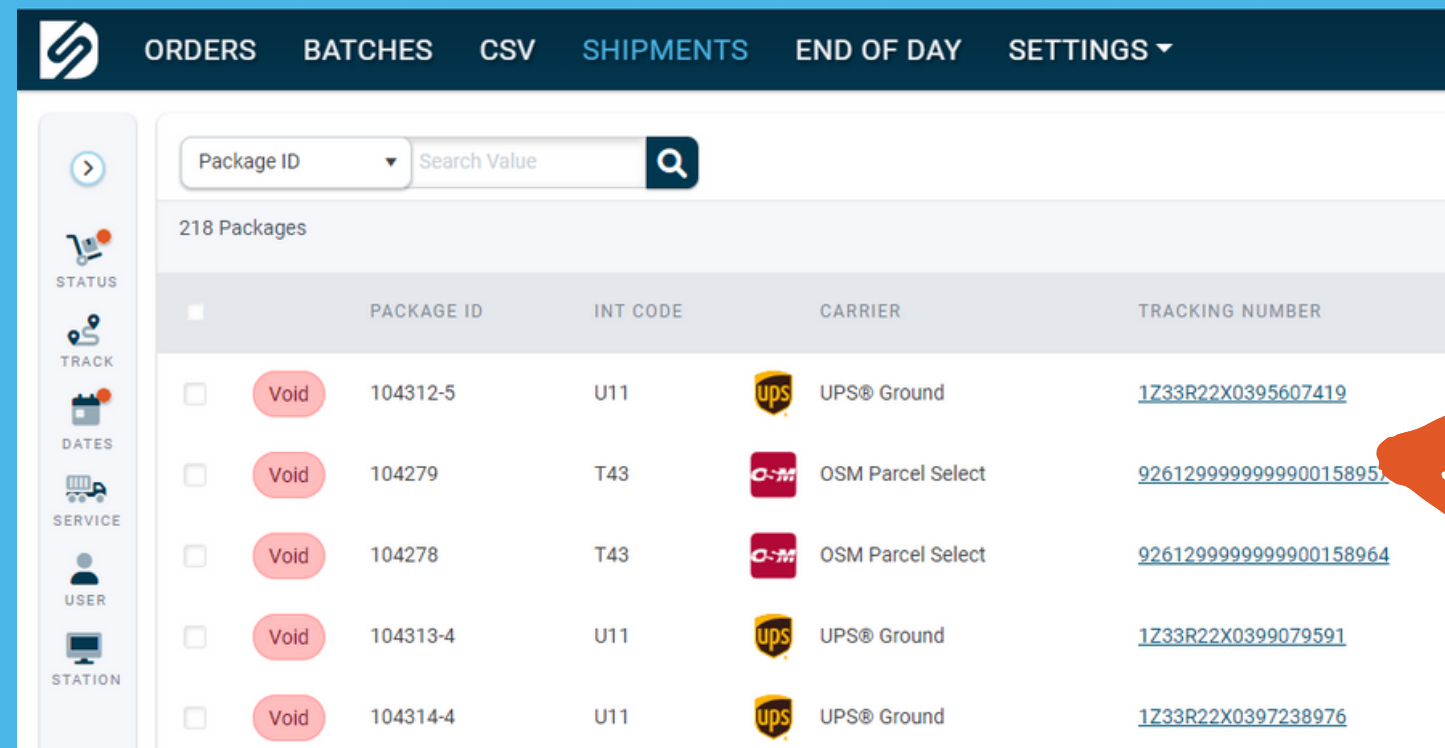
Details Fields Line Items 1 Packages 1 Notes 0 Tags 0

Add Package Shipments

ITEMS	PACKAGE ID	STATUS	CARTON COST	CARTON WEIGHT	CARRIER
<input checked="" type="checkbox"/>	103680	Active	\$10.44	0.4800	OSM

Shipped 104037 23-08318-07524 Cheapest Rate

Shipped 104038 #TOP75441 T88



ORDERS BATCHES CSV SHIPMENTS END OF DAY SETTINGS

Package ID Search Value

218 Packages

	PACKAGE ID	INT CODE	CARRIER	TRACKING NUMBER
<input type="checkbox"/>	Void 104312-5	U11	UPS® Ground	1Z33R22X0395607419
<input type="checkbox"/>	Void 104279	T43	OSM Parcel Select	92612999999990015895
<input type="checkbox"/>	Void 104278	T43	OSM Parcel Select	926129999999900158964
<input type="checkbox"/>	Void 104313-4	U11	UPS® Ground	1Z33R22X0399079591
<input type="checkbox"/>	Void 104314-4	U11	UPS® Ground	1Z33R22X0397238976

Shipments can be voided from the **Shipments** page

Voiding a Shipment on the Orders Page

1) On Ship Server V2, navigate to the **ORDERS** page.

2) Filter for *Shipped* orders.

3) Search for the order to be voided.

4) Click the dropdown icon to view the shipment details.

5) Click the "Packages" tab

6) Click the **Void** button to void the shipment.

The screenshot displays the Ship Server V2 interface. At the top, a navigation bar contains 'ORDERS', 'BATCHES', 'CSV', 'SHIPMENTS', 'END OF DAY', and 'SETTINGS'. On the left, a sidebar has 'FILTERS', 'COLUMNS', and 'EXPORT' tabs. Under 'FILTERS', the 'ORDERS' section is expanded, showing radio buttons for 'All', 'Unshipped', 'Processed', 'Shipped' (selected), and 'Cancelled'. Below this is a 'DATE RANGE' section with 'Order Date' and 'Last 30 Days' dropdowns. The main content area features a search bar with 'Order ID' and 'Search Value' fields. Below the search bar are buttons for 'Rate', 'Ship', 'Packing Slip', 'Bulk Update', and 'Batching'. A table lists orders with columns for 'ORDER ID', 'CUSTOM ID', 'SOURCE', 'MARKET ID', and 'SHIP METHOD'. Two orders are shown: 102410 and 102443, both with a 'Shipped' status. The order 102443 is selected, and its details are shown below, including a 'Packages' tab and a 'Void' button. Red numbered callouts (1-6) indicate the steps: 1) ORDERS page, 2) Shipped filter, 3) Search bar, 4) dropdown icon, 5) Packages tab, 6) Void button.

Voiding Shipments on the Shipments Page

1) On Ship V2, navigate to the Shipments page.

2) Filter status for All orders*

3) Search the order.

4) Click the checkbox to select the order.

5) Click the "Void" button to void the shipment.

The screenshot shows the 'SHIPMENTS' page interface. At the top, there is a navigation bar with 'ORDERS', 'BATCHES', 'CSV', 'SHIPMENTS', 'END OF DAY', and 'SETTINGS'. Below this is a search bar with 'Package ID' and 'Search Value' fields. A left sidebar contains 'FILTERS', 'COLUMNS', and 'EXPORT' options. The 'SHIPMENTS STATUS' filter is set to 'All'. The main table displays 4 packages, with 2 selected (checkboxes checked). The selected packages are '104211-5' (FedEx 2Day) and 'KATIEANDMEGAN' (UPS® Ground). The 'Void' button is highlighted with a '2' badge, indicating 2 orders are selected for voiding.

	PACKAGE ID	INT CODE	CARRIER	TRACKING NUMBER	TRACKING STATUS	CREATED
<input checked="" type="checkbox"/>	104211-5	F11	FedEx FedEx 2Day	278783705	Created	10/05
<input checked="" type="checkbox"/>	KATIEANDMEGAN	U11	UPS® UPS® Ground	1Z33R22X0396024092	Created	09/30
<input type="checkbox"/>	MEGANDKATIE	U11	UPS® UPS® Ground	1Z33R22X0395784880	Created	09/30
<input type="checkbox"/>	104075-2	F11	FedEx FedEx 2Day	277919931985	Created	09/13

* Some carrier services are automatically closed upon shipment, which is why its helpful to filter status for All. Active status won't include shipments that have already closed.

- Multiple orders can be voided by selecting more than one checkbox. The "Void" button will highlight the number of orders that are selected for voiding.
- Selecting the top checkbox will mark all orders on that page for voiding.

Voiding Batches on the Shipments Page

To void a batch from the Shipments page, do the following:

- 1) On Ship Server V2, navigate to the **SHIPMENTS** page.
- 2) Filter status for **ALL**.
- 3) Search the Batch ID.
- 4) Select the package or packages that you want to void.
Selecting the top box will select ALL orders in the batch for voiding.
- 5) Click the **Void** button to void the shipment(s) or the entire batch.

The screenshot shows the 'SHIPMENTS' page in Ship Server V2. The interface includes a top navigation bar with 'ORDERS', 'BATCHES', 'CSV', 'SHIPMENTS', 'END OF DAY', and 'SETTINGS'. A search bar at the top right contains 'Batch ID: 101378'. On the left, a 'FILTERS' sidebar shows 'STATUS' set to 'All'. The main table lists shipment details with columns for 'PACKAGE ID', 'INT CODE', 'CARRIER', 'TRACKING NUMBER', 'STATUS', and 'CREATE DATE'. A 'Void' button is visible in the top right of the table area. Red callouts with numbers 1-5 point to the 'SHIPMENTS' tab, the 'All' status filter, the search bar, the checkbox for selecting all items in a row, and the 'Void' button respectively.

PACKAGE ID	INT CODE	CARRIER	TRACKING NUMBER	STATUS	CREATE DATE
102288-2	U11	UPS® Ground	1Z33R22X0399...	Closed	03/14/2022
102289-2	U11	UPS® Ground	1Z33R22X0394...	Closed	03/14/2022
102290-2	U11	UPS® Ground	1Z33R22X0391257555	Closed	03/14/2022
102290-2	U11	UPS® Ground	1Z33R22X0393352144	Closed	03/14/2022
102285-2	U11	UPS® Ground	1Z33R22X0394629111	Closed	03/14/2022
102287-3	U11	UPS® Ground	1Z33R22X0390874934	Closed	03/14/2022
102281-2	U11	UPS® Ground	1Z33R22X0393861924	Closed	03/14/2022
102289-2	U11	UPS® Ground	1Z33R22X0392172500	Closed	03/14/2022
102310-2	U11	UPS® Ground	1Z33R22X0393568091	Closed	03/14/2022
102309-2	U11	UPS® Ground	1Z33R22X0392371885	Closed	03/14/2022

What Happens After Shipments are Voided



- On the Shipments Page, the voided shipment will now be marked *"Void"*.
- On the Orders Page, the voided order's status will reset from *"Shipped"* to *"Unshipped"*
- On the Orders Page, the voided order's processing status will be reset to *"Ready"*.
- Pre-paid labels (like Pitney Bowes) will have a refund request sent to the carrier. This normally takes a couple of weeks to process before the money is refunded to your account.
- Depending on the integration, a void shipment request may be sent to your order management system. This will reset the order status there also.
- Not every integration supports this. Manual voiding of the shipment may be required in your integration.
- New shipments can now be made on the order. These will now show up as unvoided on the Shipments tab.

Unvoiding Shipments on the Shipments Page

To unvoid a batch from the Shipments page, do the following:

- 1) On Ship V2, navigate to the Shipments page.
- 2) Filter status for "Void"
- 3) Search the order.
- 4) Click the checkbox to select the order.
- 5) Click the "Unvoid" button to void the shipment.

The screenshot shows the Shipments page interface. The top navigation bar includes 'ORDERS', 'BATCHES', 'CSV', 'SHIPMENTS', 'END OF DAY', and 'SETTINGS'. The left sidebar has 'FILTERS', 'COLUMNS', and 'EXPORT' tabs. Under 'FILTERS', the 'SHIPMENT STATUS' filter is set to 'Void'. A search bar is located above the table. The table displays 42 packages, with the first one selected. The 'Unvoid' button in the top right corner of the table is highlighted with a callout '5'.

	PACKAGE ID	INT CODE	CARRIER	TRACKING NUMBER	TRACKING STATUS	CREATE DATE
<input checked="" type="checkbox"/>	Void 104312-5	U11	ups UPS® Ground	1Z33R22X0395607419	Exception	10/21/2022
<input type="checkbox"/>	Void 104279	T43	C-O SM Parcel Select	926129999999900158957	Unknown	10/21/2022
<input type="checkbox"/>	Void 104278	T43	C-O SM Parcel Select	926129999999900158964	Unknown	10/21/2022
<input type="checkbox"/>	Void 104313-4	U11	ups UPS® Ground	1Z33R22X0399079591	Exception	10/21/2022
<input type="checkbox"/>	Void 104314-4	U11	ups UPS® Ground	1Z33R22X0397238976	Exception	10/21/2022
<input type="checkbox"/>	Void 104312-4	U11	ups UPS® Ground	1Z33R22X0395850389	Exception	10/21/2022

- Multiple orders can be unvoided by selecting more than one checkbox. The "Unvoid" button will highlight the number of orders that are selected for voiding.
- Selecting the top checkbox will mark all orders on that page for voiding.

What Happens After Shipments are Unvoided



- On the Shipments Page, the unvoided shipment will now be marked *"Active"*.
- On the Orders Page, the unvoided order's status will reset from *"Shipped"* to *"Unshipped"*.
- On the Orders Page, the unvoided order's processing status will be reset to *"Shipped"*.
- Unvoiding Pre-paid labels (like Pitney Bowes) will not affect an awaiting refund or an already refunded ship charge. The carrier will need to be contacted to cancel the refund.
- The integration associated with the order will not be sent notice that the shipment was unvoided.

End-of-Day

shipv2.desktopshipper.com





This section covers the "End-of-Day" process which is closing out shipments for your non-automatic closing carriers.



Info About Closing Carriers

- Some carriers that are API based such as UPS and Fedex, do not require an end-day-day task. In fact when an order from these carriers are shipped, the shipment is automatically closed.
- All other carriers such as USPS, DHL, and OSM do require to be manually closed out whenever packages are tendered to a driver.
- For some carriers, manifest data files will be generated and sent to the carrier's FTP site.
- Also physical reports may be required to be printed and handed to the driver.
 - ie. DHL prints a driver's manifest
 - ie. Pitney Bowes prints a scan form



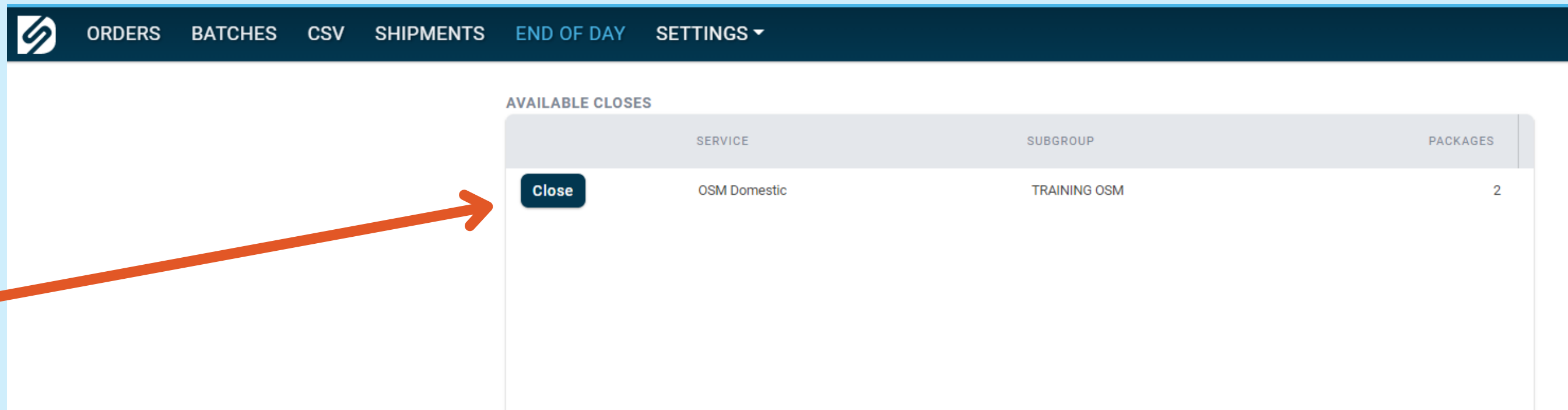
UPS Mail Innovations®

End-of-Day Page

To close a carrier, choose which carrier to be closed and click the associated

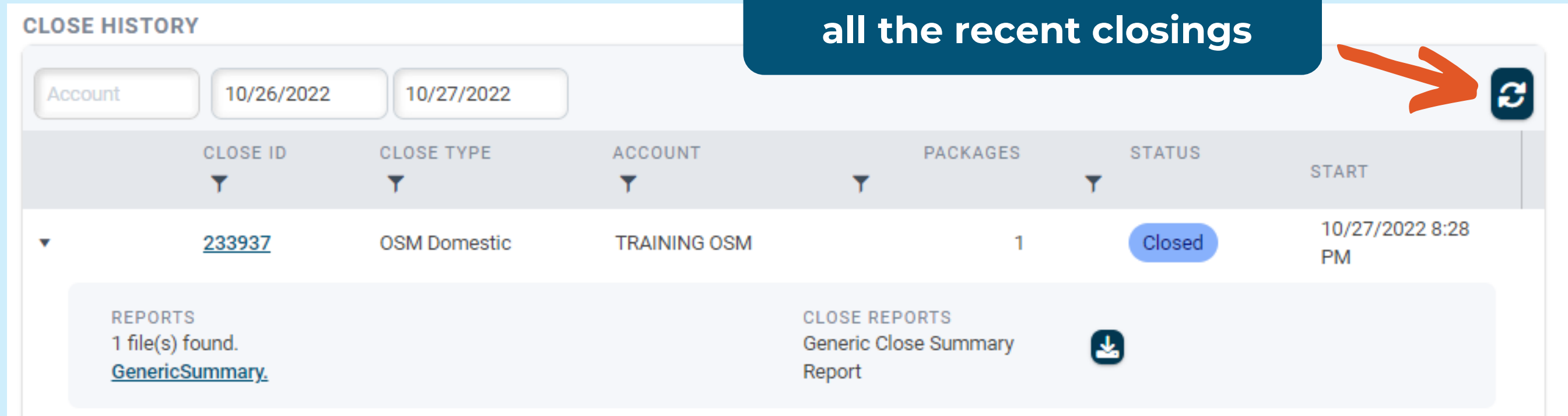


button

A screenshot of the "AVAILABLE CLOSES" section in a web application. The top navigation bar includes "ORDERS", "BATCHES", "CSV", "SHIPMENTS", "END OF DAY", and "SETTINGS". Below the navigation, there is a table with columns "SERVICE", "SUBGROUP", and "PACKAGES". A "Close" button is positioned to the left of the first row, which contains "OSM Domestic", "TRAINING OSM", and "2". An orange arrow points from the "Close" button in the text above to this button in the screenshot.

After a "End-of-Day" is performed, click the refresh button to include all the recent closings

Below the "Available Closes" section is the "Close History" section. Use these closing records to download and/or print the necessary reports

A screenshot of the "CLOSE HISTORY" section. It features a filter bar with "Account", "10/26/2022", and "10/27/2022". Below is a table with columns: "CLOSE ID", "CLOSE TYPE", "ACCOUNT", "PACKAGES", "STATUS", and "START". The first row shows "233937", "OSM Domestic", "TRAINING OSM", "1", "Closed", and "10/27/2022 8:28 PM". Below the table, there are two report sections: "REPORTS" with "1 file(s) found. GenericSummary." and "CLOSE REPORTS" with "Generic Close Summary Report" and a download icon. An orange arrow points from the text above to a refresh button (circular arrow icon) in the top right corner of the screenshot.

Insurance

Powered By

Parcel Protection

shipv2.desktopshipper.com



TRAINING



INSURANCE

Powered by

PARCEL PROTECTION

What is Insurance Powered By Parcel Protection?

DesktopShipper is partnering with Parcel Protection to provide our customers an easy way to access insurance for all carriers.

With Insurance Powered By Parcel Protection customers can easily navigate claims without having to utilize multiple software.



INSURANCE

Powered by
PARCEL PROTECTION

Requirements



You are a



DESKTOP
SHIPPER

Customer

**You Agree to the
Terms and Conditions**

Agree to the terms and opt in to DesktopShipper Insurance

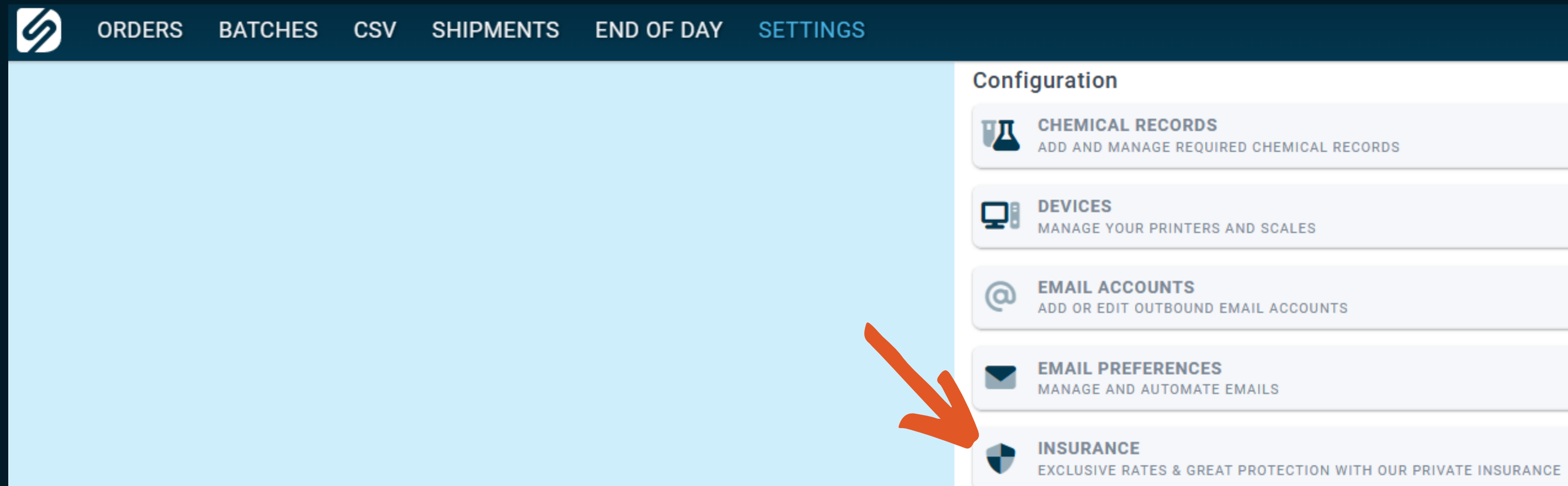
Where can I sign up for Insurance Powered By Parcel Protection?

1

Click the Settings tab to populate the drop down

2

Select "Insurance"



The screenshot shows a software interface with a dark blue header containing a logo and navigation tabs: ORDERS, BATCHES, CSV, SHIPMENTS, END OF DAY, and SETTINGS. The main content area is light blue. On the right side, there is a 'Configuration' sidebar with several menu items: CHEMICAL RECORDS (ADD AND MANAGE REQUIRED CHEMICAL RECORDS), DEVICES (MANAGE YOUR PRINTERS AND SCALES), EMAIL ACCOUNTS (ADD OR EDIT OUTBOUND EMAIL ACCOUNTS), EMAIL PREFERENCES (MANAGE AND AUTOMATE EMAILS), and INSURANCE (EXCLUSIVE RATES & GREAT PROTECTION WITH OUR PRIVATE INSURANCE). An orange arrow points to the 'INSURANCE' option in the sidebar.

The Insurance Powered By Parcel Protection Page



DOMESTIC RATES



\$1 per \$100 of coverage

INTERNATIONAL RATES



\$1 per \$100 of coverage

BILLING INFORMATION

Once a week, DesktopShipper runs an insurance report for the previous week's activity. An invoice is created based on that report and the rates above, \$1.00 per \$100.00 of coverage (domestic or international). By enabling the insurance service below, you are permitting DesktopShipper to charge your credit card or other form of payment on file for insurance coverage costs accrued during each billing week. A billing week is defined as Monday through Sunday and charges for the previous week may be billed up to 48 hours after the billing week ends. DesktopShipper reserves the right to revoke access to Parcel Protection Insurance services for any reason, including late or non-payment. Late payments exceeding 30 days will incur a 3% late fee. **If you have any questions regarding your invoice or billing information, please email accounting@desktopshipper.com**

TERMS AND CONDITIONS

Parcel Protection provides true insurance coverage for physical loss of parcels in transit and until fully delivered. Perils insured are based on "all-risk" causes of loss inclusive of physical damage, theft, etc. Coverage is provided for deliveries with origins from the United States or Canada to domestic and international locations (subject to the excluded countries and territories noted in the full terms below). Insured amounts are based on the declared values selected when electing to purchase insurance through the Parcel Protection Insurance Program, and prior to the actual shipment of the parcel. **See full terms and conditions [here](#)**

[Learn How to File a Claim](#)

Agree to the terms and opt-in to DesktopShipper Insurance powered by Parcel Protection

3

Click here to learn how to file a claim.

2

Toggle to the right to accept the terms and conditions

1

Click "here" to read the terms and conditions

How to Apply Insurance Powered By Parcel Protection to a Carrier Service

1 Click "SETTINGS" in the main menu

The screenshot shows a top navigation bar with the following items: ORDERS, BATCHES, CSV, SHIPMENTS, END OF DAY, and SETTINGS. The 'SETTINGS' item is highlighted in a darker blue. Below the navigation bar is a large light blue area containing a 'Settings' section with a gear icon and the text 'All the tools you need'. A list of settings categories is displayed on the right side of this area, including: ADD OR EDIT OUTBOUND EMAIL ACCOUNTS, EMAIL PREFERENCES, INSURANCE, LABELS, LOCATIONS, MARKETPLACE MAPPINGS, PACKAGING, PACKING SLIPS, PRODUCTS, SERVICE GROUPS, SERVICES, TAX VALUE MAPPINGS, and THIRD PARTY BILLING. The 'SERVICES' option is highlighted in a darker blue.

2 Choose the "Services" option

3 On the left hand side. Search for and select the service you would like to make Insurance Powered By Parcel Protection applicable too.

The screenshot shows the 'Carrier Services' page with the title 'Carrier Services' and subtitle 'EDIT OR CREATE CARRIER SERVICES'. At the top, there is a dropdown menu set to 'All Carriers' and a search box. Below this is a list of carrier services, including: CB11 - CBDS Return standard consolidated, CB20 - CBDS Domestic within Canada, D01 - DHL SmartMail LWP Expedited, D02 - DHL SmartMail Flat Expedited, D20 - DHL SmartMail LWP Expedited Max, D22 - SmartMail Parcel Return Light, D24 - SmartMail Parcel Return Plus, D26 - SmartMail Parcel Return Ground, D32 - DHL SmartMail LWP Ground, D33 - DHL SmartMail Flat Ground, D37 - DHL SmartMail Marketing Parcel Expedited, D38 - DHL SmartMail Marketing Parcel Ground, D40 - DHL SmartMail Parcel Expedited Max, and D43 - DHL SmartMail Parcel Expedited. An orange arrow points to the 'D22 - SmartMail Parcel Return Light' service.

How to Apply Insurance Powered By Parcel Protection to a Carrier Service

4

Under the "Disabled Special Services" section, locate the option for "DS Insurance by Parcel Protection"

CLASS NAME: USPS First Class Parcels

PROVIDER: Pitney Bowes

DEFAULT PACKAGING: None

BILL TRANSPORTATION TO: Prepaid

DISABLED SPECIAL SERVICES	
CODE	SERVICE
<input type="checkbox"/>	HFRAG Special Handling - Fragile
<input type="checkbox"/>	HND Special Handling Flag
<input type="checkbox"/>	INS Carrier
<input type="checkbox"/>	ORMD Dangerous Goods Code
<input type="checkbox"/>	PIP Private
<input type="checkbox"/>	RD Restricted Delivery
<input type="checkbox"/>	REG Registered Mail
<input type="checkbox"/>	RETREC Return Receipt
<input type="checkbox"/>	SIG Signature Required
<input type="checkbox"/>	DGC Dangerous Goods Code (v2)
<input checked="" type="checkbox"/>	DSINS DS Insurance by Parcel Protection

ASSIGNED SPECIAL SERVICES			
AUTO APPLY	CODE	SERVICE	
<input checked="" type="checkbox"/>	DCR	Delivery Confirmation	Edit

6

Click "Save"

5

Drag and drop the option into the "Assigned Special Services" section.

CLASS NAME: USPS First Class Parcels

PROVIDER: Pitney Bowes

DEFAULT PACKAGING: None

BILL TRANSPORTATION TO: Prepaid

DISABLED SPECIAL SERVICES	
CODE	SERVICE
<input type="checkbox"/>	HAZ Hazmat Flag
<input type="checkbox"/>	HFRAG Special Handling - Fragile
<input type="checkbox"/>	HND Special Handling Flag
<input type="checkbox"/>	INS Carrier
<input type="checkbox"/>	ORMD Dangerous Goods Code

ASSIGNED SPECIAL SERVICES			
AUTO APPLY	CODE	SERVICE	
<input checked="" type="checkbox"/>	DCR	Delivery Confirmation	Edit
<input checked="" type="checkbox"/>	DSINS	DS Insurance by Parcel Protection	Edit

How to Apply Insurance Powered By Parcel Protection to a Carrier Service

CLASS NAME
USPS First Class Parcels

PROVIDER
Pitney Bowes

DEFAULT PACKAGING
None

BILL TRANSPORTATION TO
Prepaid

DISABLED SPECIAL SERVICES	
CODE	SERVICE
HAZ	Hazmat Flag
HFRAG	Special Handling - Fragile
HND	Special Handling Flag
INS	Carrier
ORMD	Dangerous Goods Code

ASSIGNED SPECIAL SERVICES		
AUTO APPLY	CODE	SERVICE
<input checked="" type="checkbox"/>	DCR	Delivery Confirmation
<input checked="" type="checkbox"/>	DSINS	DS Insurance by Parcel Protection

Save

Click "Save" after you modify the Special Service settings

Click "Edit" to configure triggers to conditionally apply the insurance option.

- If you would like to have insurance auto applied, enable the checkbox on the special service.
- If you would like to add it manually leave the check box unchecked.

Click "Save" after you edit the triggers.

Edit Special Service DSINS

AMOUNT
0.0

MINIMUM AMOUNT

MAXIMUM AMOUNT

Save Cancel

- Enter the \$ amount of insurance to be applied.
- Insurance will be automatically applied to orders that are worth more than the minimum value entered.
- insurance will be automatically applied to orders that are worth more than the minimum value entered.

Manually Applying Insurance Powered By Parcel Protection to a Package

Once enabled on the carrier services you can apply *Insurance Powered By Parcel Protection* to your packages.

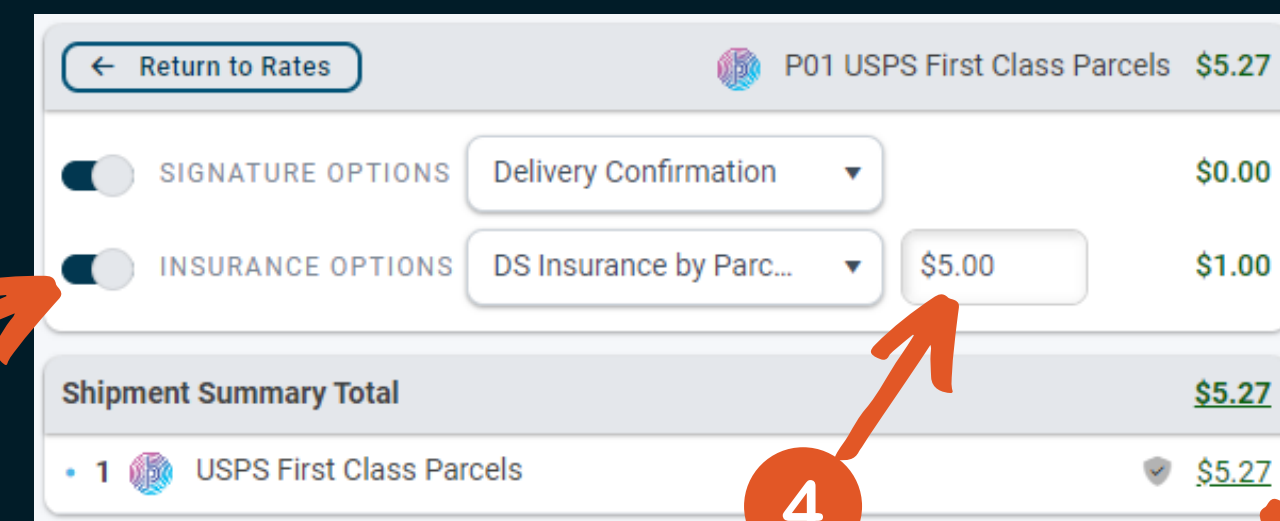
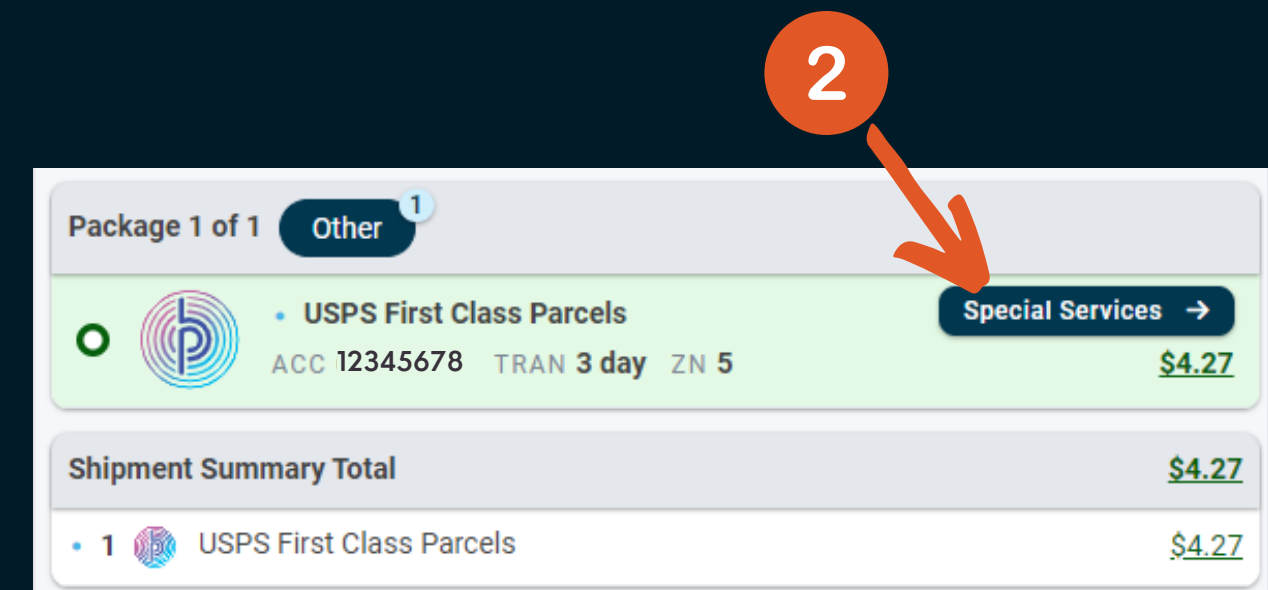
1) In the "Shipping" module from the Orders Page, verify the order you wish to apply an insurance charge to is rating.

2) Click "Special Services".

3) Toggle the *Insurance Options* on and select "DS Insurance by Parcel Protection".

4) The Value will be automatically equal to the order value. You can change it to a lesser value if desired.

5) The Rate should automatically change to a new rate with the insurance charge added on.



Steps for Filing an Insurance Claim

Step One:

1) Look up the *Insurance Powered By Parcel Protection* insured package through the **Shipments Page**.

2) In the package details, locate the "Additional Carrier Information" section.

3) Press the **File a Claim** button to be redirected to the ParcelProtection claims page.

Package 104244-4

Tracking

TRACKING NUMBER
• 9261212345678901000642

ALT TRACKING NUMBER

STATUS
• Delivered

LAST UPDATE
• 10/28/2022 5:56:47 PM

TRACKING MESSAGE
• Test Mode package

[Update Tracking](#)

Address

Ship To Return Origin

Megan
desktopshipper
3220 SW 1ST AVE
PORTLANDOR97239-4677
US

Items (1)

1 Package Item 0 Customs Items

SKU	ITEM	DESCRIPTION
1234	test	

Surcharge/Fee Information

BASE CHARGE • \$6.51	PRIVATE INSURANCE AMOUNT • \$1.00
PRIVATE INSURANCE CHARGE • \$1.00	TOTAL CHARGE • \$7.87
FUEL SURCHARGE • \$0.04	PEAK TIME SURCHARGE • \$0.32

Additional Carrier Information

MAILER ID
• 123456789

PICKUP ID
• 5311111

PARCELPROTECTION
[File a Claim](#)

Additional References

RATED VALUE
• 6.8700

Steps for Filing an Insurance Claim (continued)

Step Two:

A new tab in your browser will load, opening a page to the *Parcel Protection* site.

1) Your package info will pre-populate.

2) Click the "I'm not a robot" checkbox.

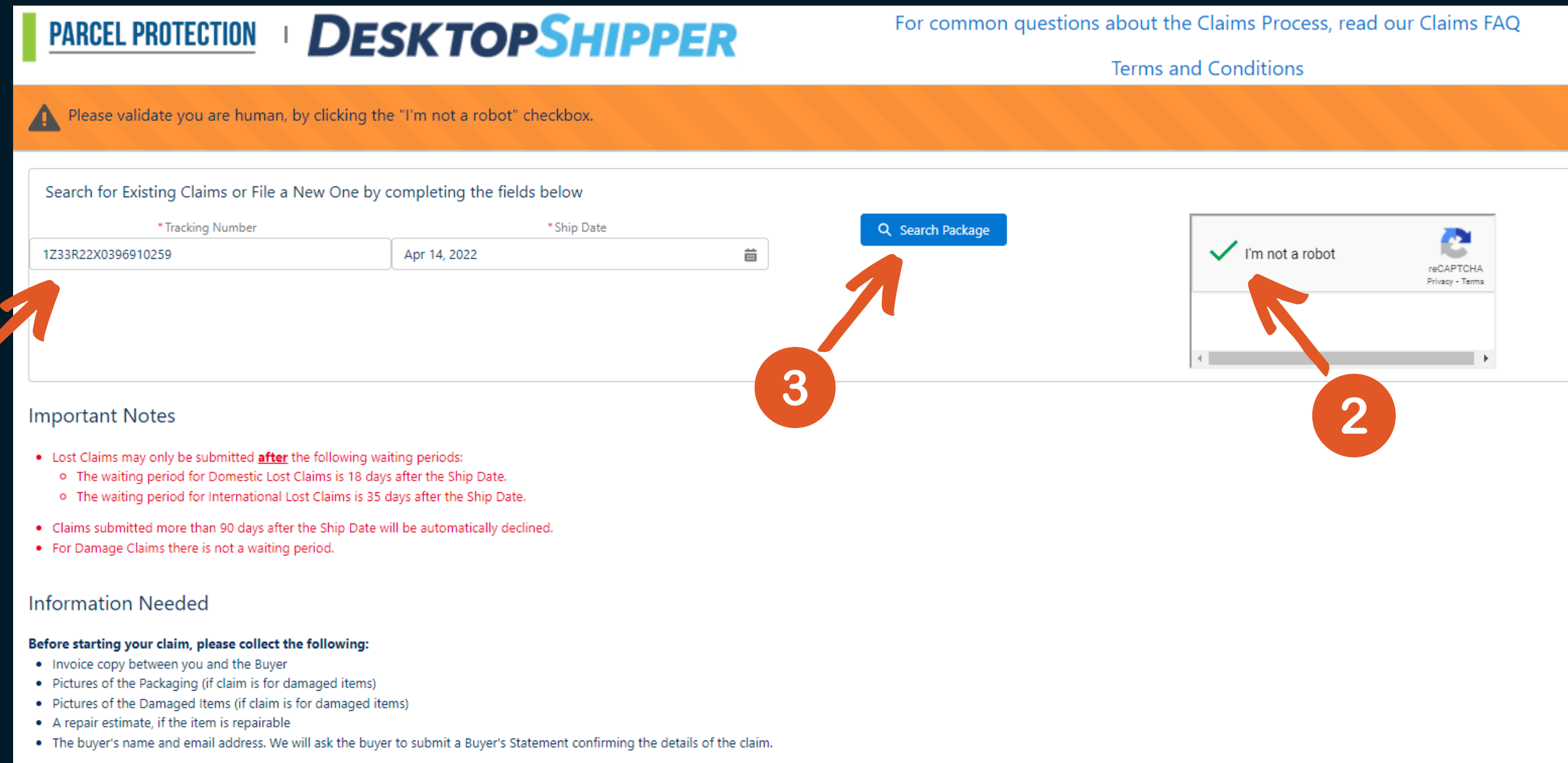
3) Search for your claim.

 Search Package

1


3

2




PARCEL PROTECTION | **DESKTOPSHIPPER** For common questions about the Claims Process, read our [Claims FAQ](#)


[Terms and Conditions](#)

 Please validate you are human, by clicking the "I'm not a robot" checkbox.

Search for Existing Claims or File a New One by completing the fields below

* Tracking Number	* Ship Date
1Z33R22X0396910259	Apr 14, 2022

 Search Package

I'm not a robot 

Important Notes

- Lost Claims may only be submitted **after** the following waiting periods:
 - The waiting period for Domestic Lost Claims is 18 days after the Ship Date.
 - The waiting period for International Lost Claims is 35 days after the Ship Date.
- Claims submitted more than 90 days after the Ship Date will be automatically declined.
- For Damage Claims there is not a waiting period.

Information Needed

Before starting your claim, please collect the following:

- Invoice copy between you and the Buyer
- Pictures of the Packaging (if claim is for damaged items)
- Pictures of the Damaged Items (if claim is for damaged items)
- A repair estimate, if the item is repairable
- The buyer's name and email address. We will ask the buyer to submit a Buyer's Statement confirming the details of the claim.

Steps for Filing an Insurance Claim (continued)

Step Three:

Once your package has been located proceed with the following:

1) Select a "Claim reason".

2) Click **Choose a Claim Reason**

You will receive a success or error message at this point.

PARCEL PROTECTION | **DESKTOPSHIPPER** For common questions about the Claims Process, read our [Claims FAQ](#) [Terms and Conditions](#)

Your tracking data has been found, please specify a Claim Reason to continue.

Carrier	UPS - Domestic	Ship Date	4/14/2022
Tracking Number	1Z33R22X0396910259	Max Insured Value per Package	\$10,000.00
Invoice Number		Deductible	\$0.00
Buyer's Name	Katie Laval	Insured Value ⓘ	\$1.00
Buyer's Address	3220 SW 1ST AVE, STE 100, PORTLAND, OR 97239		

*Select a Claim Reason
Lost

Choose Claim Reason

Your tracking data has been found, please specify a Claim Reason to continue.

Claims Requirements



Tracking

and



**Ship Date
information**

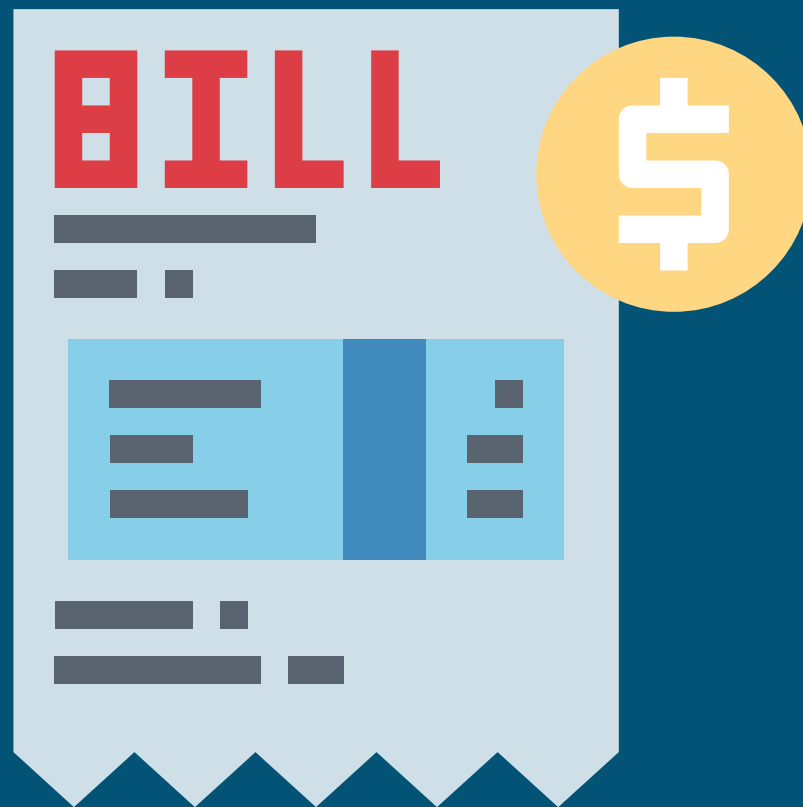
Note: Claims need to be submitted no sooner than 18 days after shipping for domestic shipments, 35 days after to shipping for international shipping, and no later than 90 days after shipping.

[Learn about the claims process here](#)

File new claim or check the status of an existing claim

How am I Billed for Insurance Powered By Parcel Protection?

You will receive a weekly invoice from
DesktopShipper Accounting



DesktopShipper Support

Please contact our *Support Team* for any assistance you need with shipping your orders.



Chat: www.desktopshipper.com/support



Email: support@desktopshipper.com



Phone: 503.331.4000

Getting Started on DesktopShipper ShipV2

COMPLETED

shipv2.desktopshipper.com

