

ShipWorks

Getting Started



Or “How I Learned to Stop Worrying
And Love Multi-Carrier Shipping”

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Dedication

ded·i·ca·tion [ded-i-**key**-shuh/n]

Noun.

- (1) The state of being dedicated.
- (2) The act of dedicating.

Example: This setup guide is dedicated to anybody who has used our products—trial users, loyal customers, family members, friends, and our team.

On the best days, you've allowed us to do what we're passionate about: helping people through problem solving. On the not-so-great days, you've provided us with ways to continuously seek improvement and innovation.

Thank you for everything.

I. Welcome to ShipWorks

We're grateful that you're trying to simplify your e-commerce business by using our software. We will do our best to equip you with the knowledge and skills to make this transition as painless as possible.

You're likely reading this because...

- ...you want to save time with your shipping setup.
- ...you want to grow your e-commerce business.
- ...you've just downloaded the software and have no idea what to do next.
- ...you need a new hobby, new friends, or generally need to get out more.

What Will ShipWorks Do?

ShipWorks seamlessly integrates with **online shopping marketplaces** and **shipping providers**. With one click, you can process shipments, print labels and invoices, and update online tracking information.

Sometimes, people associate "middleman" with a negative connotation. We'll let you decide if that applies to ShipWorks. (Spoiler alert: it doesn't.)

Simply put, ShipWorks is the middleman between your online store(s) and your shipping provider(s). By connecting to your online marketplace and shipping provider, ShipWorks keeps track of order information, processes shipments, and generates related paperwork.

Often, we find that this reduces time, agony, and frustration...and, in some cases, preserves sanity.*

ShipWorks' functionality extends as far as your imagination wants to take it.

- Do you want to print out packing slips automatically? ShipWorks can do that.
- Do you want to create rules that automatically configure your shipments? ShipWorks can do that.
- Do you want to automatically upload tracking numbers and email your customers? ShipWorks can do that.
- Do you want ShipWorks to get you a cup of coffee, give you a massage, and babysit your kids? ShipWorks can't do that. It's only a software program. Don't be greedy.

*The sanity claim has not been verified through scientific research. It's just a hunch, not (yet) science.

You Might Be Saying, “This Sounds Great. How Do I Get Started?” (Thank You.)

You Will Need to Have a Computer with the Following:

- an internet connection.
- at least one computer (although ShipWorks can run on a networked system, only one computer is required to start)
- a youthful spirit, unwavering confidence, and a smile that will melt even the coldest heart.

PCs and Mac Compatibility. Can't We All Just Get Along?

Currently, ShipWorks is supported on:

- Windows XP, Vista, 7, or later (32 and 64-bit systems are supported).
- 1.8 GHz (or faster) processor.
- Minimum of 2 GB of RAM.
- Minimum of 4 GB of available hard disk.

If you're unsure of your computer's compatibility, consult its documentation.

(But if you're like 99% of people who throw out extraneous paperwork, you can always go to **Windows Start Menu > Control Panel > System.**)

Where's the Love for Apple Users?

We get a lot of questions regarding Apple/Macintosh compatibility. We understand that Apple products have a large following. Most of us don't have anything against Apple or Macs (with the exception of Tim, one of our .NET developers). We just haven't developed ShipWorks to run on Apple platforms yet.

Don't fret. We do have a workaround to placate Mac audiences.

ShipWorks can work with virtual PC emulators, which are generally available for free download after an internet search. Download and install the emulator.

Then, follow our set up instructions. You'll be up and running in no time.

It's just that simple.

License Information

ShipWorks is a licensed service. Download our free software and it is fully functional for 30 days. After your first 30 days, you have the option to register for a monthly service.

We realize that committing to a monthly service is a big decision for any business. We want you to feel comfortable with our software before committing to anything. (Or not committing to anything. No pressure.)

Do you already have a licensed store? By integrating a free trial with your current store, you can test how your online presence may expand into different marketplaces.

Find what works for you. We love when people try new things.

It is Dangerous to Go Alone – Take This Guide!

This manual will walk you through basic functions of ShipWorks, from downloading our software to printing a shipping label.

Be warned: This particular set up guide will not tell you every detail about ShipWorks. (More user guides are on the way to help this process!)

But Wait, There's More!

In addition to this guide, we're always more than happy to help get you started using ShipWorks. We realize that every customer's shipping setup is different--with quirks and intricacies that a user guide simply can't cover.

Contact Us

If you have questions (for any reason), our customer care team is ready to help you get up and running. They love hearing from you.

There are two ways to contact us: filling out a support request online or calling our toll-free number.

1. To fill out a support request online, go to <http://www.shipworks.com/company/contact.html>. Your request will be assigned a case number and a representative will contact you as soon as possible.
2. Give us a call. Our number is (800) 952-7784. Our support hours are Monday-Friday, 8:00 a.m. -5:00 p.m. (CST).

But enough introductions. Let's get started.

II. Downloading and Installing ShipWorks

Your first step in starting this magical journey is to download the software from our Web site.

To download the software, go to <http://www.shipworks.com/shipworks/download.php>.

The Installation Process

Installing ShipWorks is relatively easy. ShipWorks has many helpful wizards that will guide you through the set up process.

(But remember, if you run into trouble, we're always only an email or a phone call away!)

What is a Wizard?

No, we're not talking about the Wizard of Oz, Hogwarts, or World of Warcraft. For our purposes, a **wizard** is a series of screens that guide you through (otherwise complicated) actions.

In ShipWorks, you'll see different wizards for different tasks—the Setup Wizard, the Add Store Wizard, a Shipping Set Up Wizard... you get the idea.

Starting the Setup Wizard:

1. To start the **Setup Wizard**, navigate to where you saved the setup file you downloaded from the ShipWorks Web site. Double-click it.
2. After double-clicking the file, Windows will prompt you to run or save the file. Click **"Run"**.
3. Follow the instructions on the screen. The set up process is pretty intuitive. However, if you get nervous with a lack of directions, see the notes below.



Example 2.1: The "Setup Wizard" screen.

Helpful hint: The setup file should include "ShipWorks" in the title. If you forgot where you saved it on your computer, just perform a search on your hard drive by going to **Start Menu > Search Programs and Files > Type in ShipWorks**.

Voila—it's almost like magic.

Breaking Down the Installation Process

ShipWorks uses Microsoft SQL Server 2008 to store all your downloaded order information. It's a database (if you don't know what that is, don't worry about it).

To run smoothly, ShipWorks needs to install the following: MS SQL Server 2008, Microsoft .NET Framework 4.0, Windows Installer 4.5, and additional SQL-related components. Also, you will be asked to update your Windows Firewall.

This may sound like a lot of work—it's not. ShipWorks does almost all of the work for you. All you (generally) have to do is press **"Next"** or **"Continue"**.

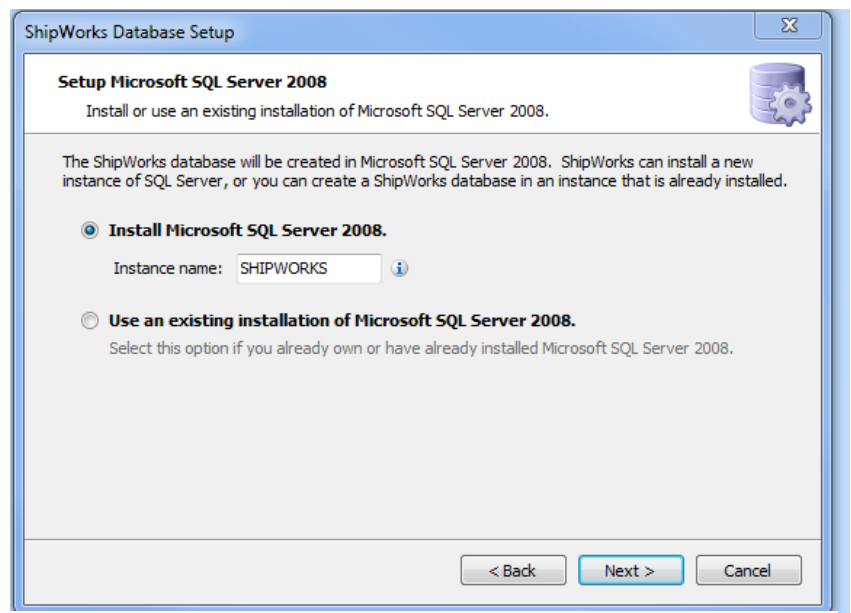
Afraid of Messing Up? Here Are Some Answers.

1. I'm prompted to enter an instance name (on the Microsoft SQL Server 2008 screen).

What do I do? What is this?

We recommend that you leave the instance name as SHIPWORKS. This is only to prevent interfering with any other database that might be already on your system. However, it is perfectly acceptable to change the instance name...if you feel like living dangerously.

A **SQL Server instance** is a database environment. It includes the database (where your order information is stored), as well as its environment (for example, any related support files that help your database run).

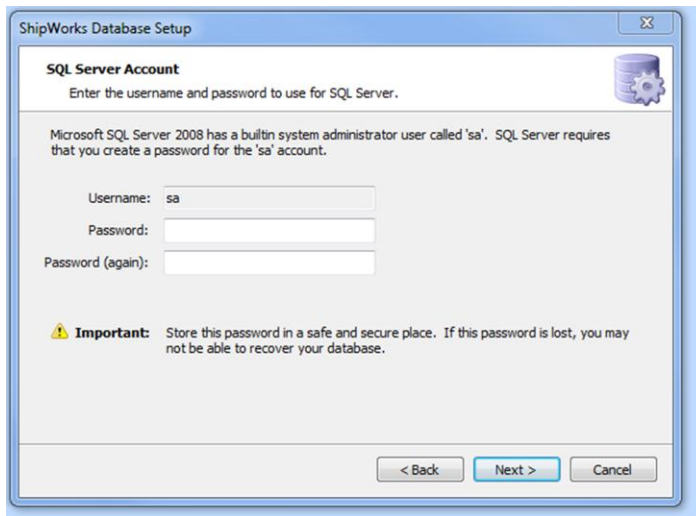


Example 2.2: Installing Microsoft SQL Server Instance.

2. The “Install .NET Framework SQL Components” screen shows a status bar next to “Download” that doesn’t seem to show any progress. What do I do?

Try clicking the “**Download**” button next to the status bar. The “**Next**” button won’t be available to click until the .NET Framework SQL Components are downloaded.

3. Why can’t I change the username on the SQL Server Account screen?



Example 2.3: Creating your SQL Server password.

This is the default setting that authorizes ShipWorks to make any changes to your newly created database. (The “sa” stands for system administrator.)

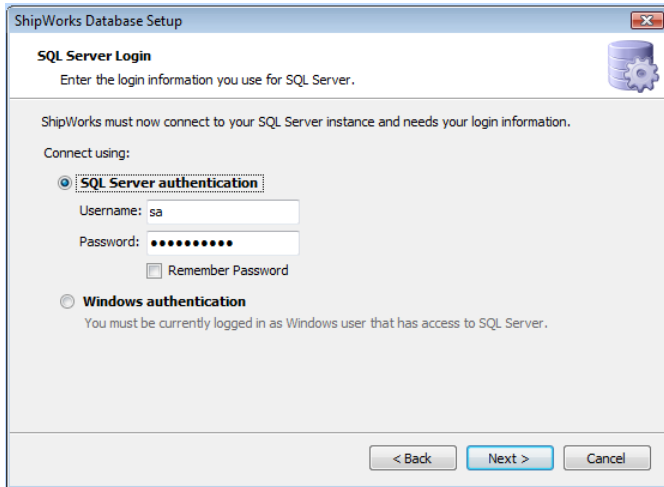
When you create a password for this account, it is **extremely important** that you record the information in a safe (but accessible) place. If we need to access your database (like restoring a database in case of catastrophic failure), we will need these credentials.

We have no other way of retrieving this information unless you provide it to us. So, help us help you. Write it down.

Pro tip: You can also try logging into your SQL server by selecting the “Windows authentication” option from the list. This uses your Windows administrator’s account credentials (username/password) to make changes to your SQL database.

4. What is the difference between my Microsoft SQL Server account and my ShipWorks user account?

These accounts have separate credentials and separate log-on screens.



Example 2.4: The SQL Server log-on screen.

Your **Microsoft SQL server account** is what ShipWorks uses behind-the-scenes to connect to SQL server. ShipWorks interacts directly with your MS SQL Server database, so you don't have to. Unless otherwise prompted, you shouldn't have to log-on to anything other than the ShipWorks environment.



ShipWorks user accounts are accounts that you can create for you and anyone else who needs to use ShipWorks. This is what you'll use to log on to the software. (Note: this is different than your shipworks.com account.)

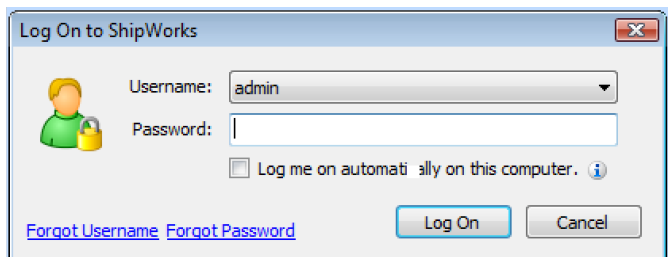
5. What if I lose my ShipWorks user account password?

This happens a lot—we have you covered.

Just click on the **"Forgot Password"** link (located on the ShipWorks log-on screen). You will be emailed a link that walks you through the reset process. (It may be helpful to write this log-on information down, too.)

You can access the log-on screen by opening ShipWorks, prompting it to appear.

Otherwise, click the ShipWorks logo () in the top left corner of your ShipWorks screen, click "Log Off" from the drop-down menu. Click the ShipWorks logo () once more, and click "Log On".



Example 2.5: The ShipWorks log-on screen that appears when you open ShipWorks. Use your ShipWorks Log-on credentials for this dialog box.

III. Setting Up Your Store

Adding a Store

After completing the installation process, the **Add Store Wizard** will walk you through configuring your online marketplace. To us at ShipWorks, a “**store**” is a single account, online marketplace, or sales channel. Select your online marketplace from the drop-down menu and follow the instructions. (In some cases, you may be using an integration that was written by one of our 3rd party partners. If you don't see the name of your marketplace, you may need to choose 'Generic Module'.)

Admittedly, some stores require more love, care, and attention to set up than others. Don't worry. The **Add Store Wizard** will walk you through this process.

Before you get started, you will likely need your online marketplace's administrator username and password, as well as your marketplace's email address and web address (URL).

Other stores require:

- A merchant ID of some kind:
 - Amazon (Merchant ID and Marketplace ID)
 - eBay and Etsy (Log-in token).
 - Newegg (Seller ID and Secret Key),
 - OrderMotion (HTTPBiZID).
- Uploading a store module to your store's Web site (CRE Loaded, Magento, Miva Merchant, osCommerce, VirtueMart, X-Cart, ZenCart).
- For a handful of stores, you may need additional FTP credentials. If you don't have this information, contact your store's IT administrator.

A **module** is a fancy term we made up for a file that ShipWorks uses to connect to your store's Web site.

Now that you're armed with this information, nothing can stop you. Continue walking through the set up process with confidence. (Go you.)

Sidebar: Quick and Dirty Tips to Install a Module

If you sell on CRE Loaded, Magento, Miva Merchant, osCommerce, VirtueMart, X-Cart, or ZenCart, you'll need to [download a file](#) from our Web site (we call it a “module”) and transfer it to your store's server.

If you don't sell on these platforms, there is nothing to see here. Please carry on.

For these stores (except Miva Merchant), you will need to know your store's FTP address, host address, port (usually 21), and administrator username and password.

1. Go to <http://www.shipworks.com/shipworks/downloadcustomer.php> and download the module for your online marketplace.
2. Open the .zip file and extract the .php file.
3. Transfer the .php file to your storefront's admin folder. (This step generally requires the use of an FTP client to complete the transfer.) For Miva Merchant, you will upload this file via the Miva administrator site for your store (see below).
4. Enter the module URL on the ShipWorks screen.
5. Celebrate!

Example:

If your website URL is **http://www.example.com**, then the full module URL will be **http://www.example.com/admin/shipworks3.php**.

If you are not comfortable with using an FTP client, the ShipWorks support team can walk you through this process.

Call us. We want to get your store up and running.

Additional Support for Magento Go:

We love Magento. However, we also recognize that configuring Magento with ShipWorks might be especially confusing.

We've created a video that takes you step-by-step through the initial process of configuring Magento Go with the ShipWorks platform.

Visit <http://www.youtube.com/shipworks> for more information.

Additional Support for Miva Merchant

We also love Miva Merchant. Follow the steps below to continue setting up your store.



1. Log on to your administrator account (if necessary, switch to **"Advanced Administration"** view on top right screen).
2. Expand the **"Global Settings"** category (on the left sidebar) and click the **"Add"** link next to the **"Modules"** link.
3. Upload the module file that you downloaded from the ShipWorks site (ShipWorks3.mvc).
4. After uploading the module, you will need to activate it within Miva Merchant. Stay on the **"Modules"** screen (**Global Settings > Modules**) and search for SHIPWORKS in the search bar.

5. After finding the **“ShipWorks3.mvc”** file, click the **“Edit”** button. Make sure the **“Active”** checkbox is checked and click the **“Update”** button.
6. Under your store name in the left side bar, click the **“Utilities”** link. After finding the **“ShipWorks3 Module,”** make sure the **“Assigned”** checkbox is checked and click the **“Update”** button.
7. Success! You’re now ready to complete the remaining steps in the **Add Store Wizard**.

Your First ShipWorks Session

When the **Add Store Wizard** completes, you’ll be transported into the wonderful world of ShipWorks.

Wondering what to do first?

Go ahead and click that big, green **“Download”** button  (Download ).

This brings your order history into ShipWorks. The first time you download orders, it might take a bit of time—it’s only because ShipWorks is busy downloading a lot of orders. (Future downloads won’t be as long.)

Something to note: When ShipWorks downloads previous orders, it may include those that have already been shipped (from before you started using ShipWorks). It will include all orders on one screen until you adjust your **“Shipped”** and **“Not Shipped”** filters to work with your online marketplace(s).

We’ve a [guide to help walk you through this](#). However, if you feel stuck, feel free to call us, so we can **“sort”** this out for you. (And we promise not to make any more filter puns.)

IV. Setting Up Your Shipping Provider

Now that you have your online marketplace configured, you need to connect to your shipping provider (like FedEx, UPS, and USPS).

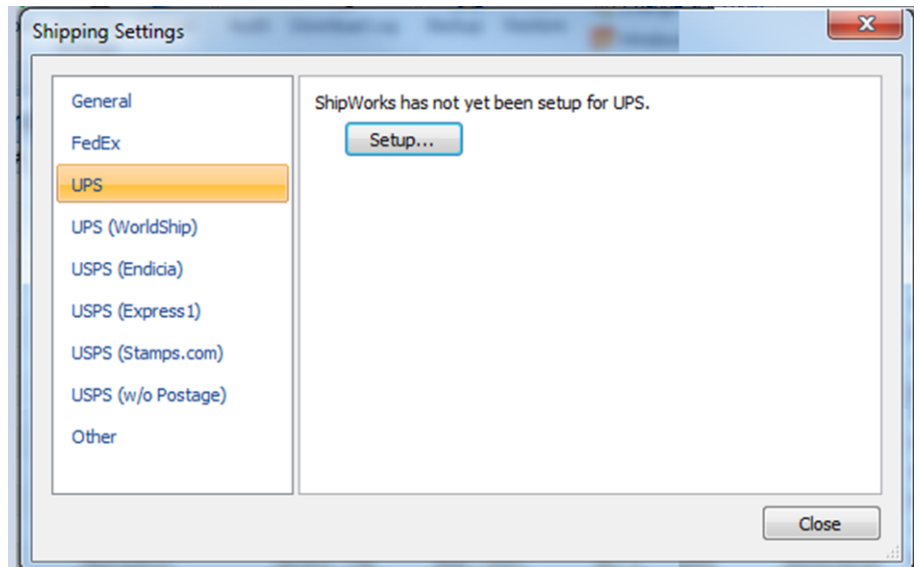
Click on the **Manage > Shipping Settings > Select Your Shipping Provider**. Click the **“Setup”** button.

This will prompt...you guessed it, another wizard. Welcome to the **Shipping Setup Wizard**.

There are two parts to the **Shipping Setup Wizard**:

1. The first part requires you to enter your **shipping account information**.

Connecting to your account lets ShipWorks retrieve rates, download shipping labels, get tracking numbers, and so on.



Example 4.1: Setting Up a Shipping Provider. In this example, this would set up a UPS account within ShipWorks.

2. The second part concerns your **printing setup**. This part is a bit more complicated. Just follow along and enter the information when the Wizard asks for it.

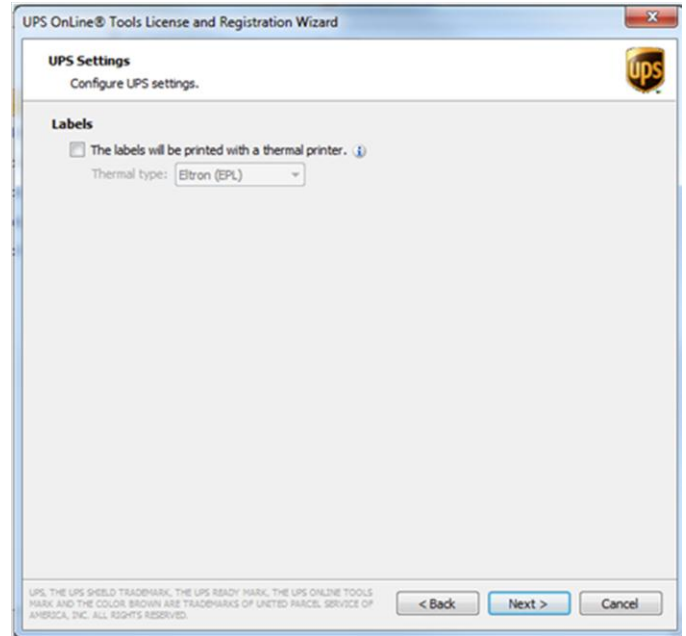
Configuring Your Printing

During the **Shipping Setup Wizard**, you may be asked about printing labels with a thermal printer.

If you are using a **standard printer**, do not check the box. Go directly past Go. Collect \$200. Click **“Next”**.

If you are using a **thermal printer**, check the box.

If you **don’t know what type of printer** you have, do a quick internet search with the make/model number. (Or see the chart below.)



Example 4.2: Checking the box will allow ShipWorks to download labels in a thermal format.

Some Common Thermal Printers and the Languages They Support:

Model:	Formats Supported:	Recommended Format:
LP2844	EPL only	EPL
Zebra RW420	ZPL/EPL	ZPL
Zebra ZP450	ZPL/EPL	ZPL
Zebra ZP500	ZPL/EPL	ZPL
Zebra ZP505	ZPL only	ZPL
ZM 400	ZPL only	ZPL

Example 4.3: Commonly used printers in ShipWorks and their thermal formats.

If you have a **DYMO thermal printer**, please call us to help set it up. DYMO thermal printers do not use the traditional EPL/ZPL format and can be tricky.

What if you don’t know the difference between the two? The heat is on. (Literally.)

What's the Difference?

Thermal printers use heat to print. To do this, they use one of two formats: EPL or ZPL. These are languages that tell the thermal printer how to print the label.

Standard printers use ink or laser technology to print.

It is **extremely important** that you set this option correctly; otherwise your printing setup will not work.

Printing Rules

ShipWorks automatically creates rules for printing with both standard/thermal printers. If you just use one format, it's okay. The printing rules account for one type, or both types. You shouldn't have to change anything.

For **UPS and FedEx setups**, your default rules will look like:


Automatic Printing


Automatically print labels after processing.

Output Rules

ShipWorks will print using the first template in each group that satisfies the condition.


Labels ABC

 If the shipment is in print with


 Otherwise [Always](#) print with

 Add

Commercial Invoice ABC

 If the shipment is in print with

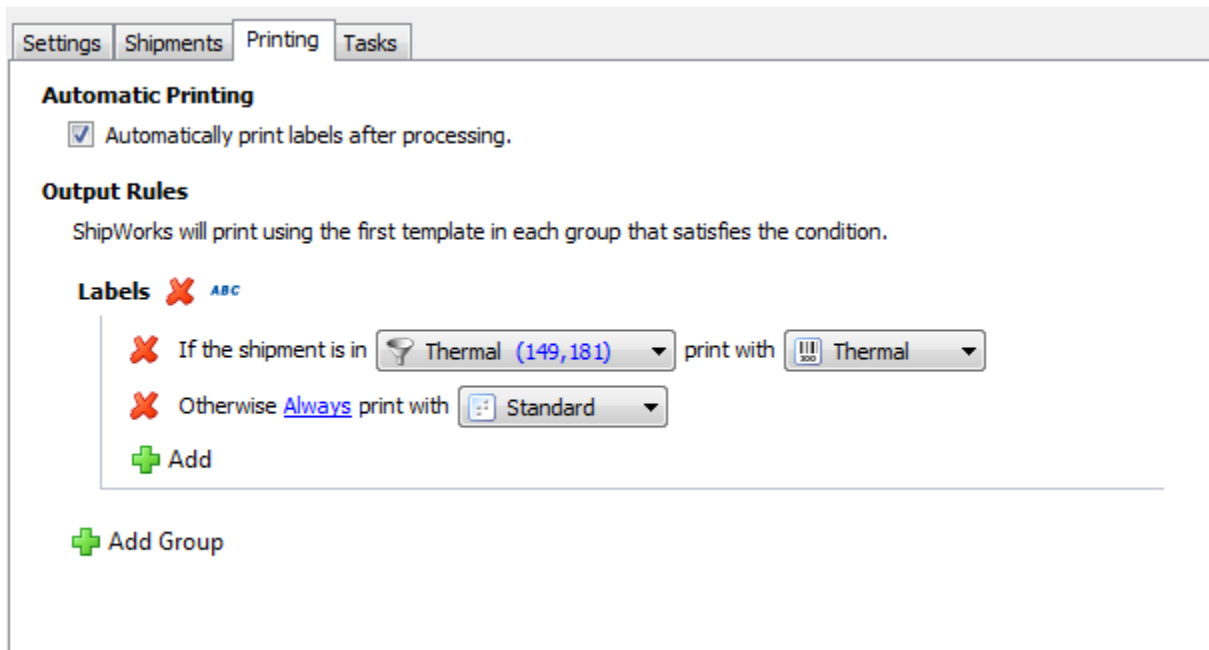
 Add

 Add Group

Example 4.4: Default printing rules for UPS / FedEx shipments.

Notice that this group of rules will print out labels (either thermal or standard), as well as a commercial invoice for international shipments.

For your **USPS setup**, your default rules will look like:



Example 4.5: Default printing rules for USPS shipments.

After completing the **Shipping Setup Wizard**, you can return to these rules by navigating to **Manage > Shipping Settings**. From the left-side menu, select your shipping provider. At the top of the new screen, select the printing tab. From here, you can double-check your setup.

How Printing Rules Work:

When you process a shipment, ShipWorks applies the printing rules to your orders and automatically uses the correct template when printing a label.

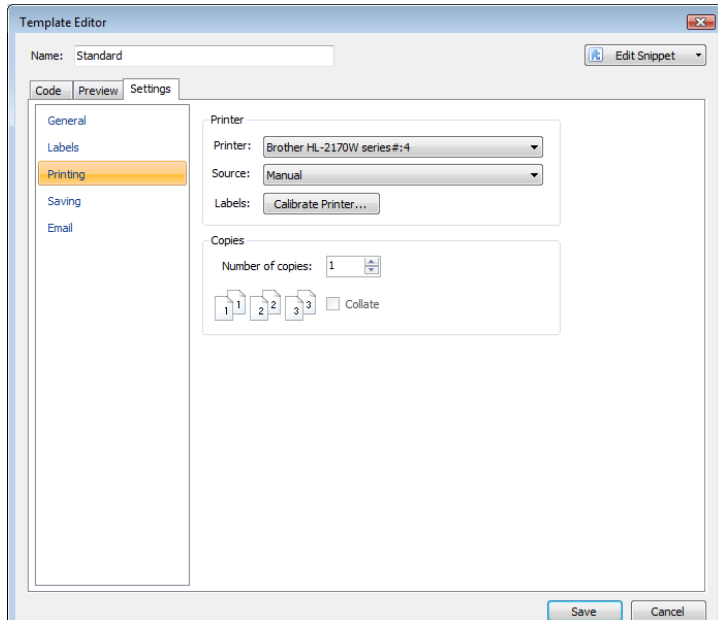
What's a Template?

A template is an invoice, a shipping notification, a sales tax report, or anything else you may want to save, print, or email. A template uses placeholders to control where order and shipment information (from ShipWorks) appear.

Templates and Printing Labels: Two Great Tastes that Taste Great Together

So, what do templates have to do with printing labels? A lot.

A template formats your data and sends it to the printer. When you first set up a shipping account, you will need to route your thermal, standard, and (if applicable) commercial invoice templates to the correct printer(s).



Example 4.6: Connecting your templates with your printer.

You can connect the printers to your templates by choosing the “default” link (which will select your computer’s default printer) or by choosing specific printers on your network.

If you need to make adjustments after your initial setup, click **Manage > Templates > Labels > (Select Correct Template) > Edit > Settings > Printing > (Select the Printer)**. This will route your printers with the correct templates.

Make sure to connect your thermal printer with your thermal template, and your standard printer with your standard template.

After selecting your printers, finish the remaining steps of the Shipping Wizard.

...And you’re done!

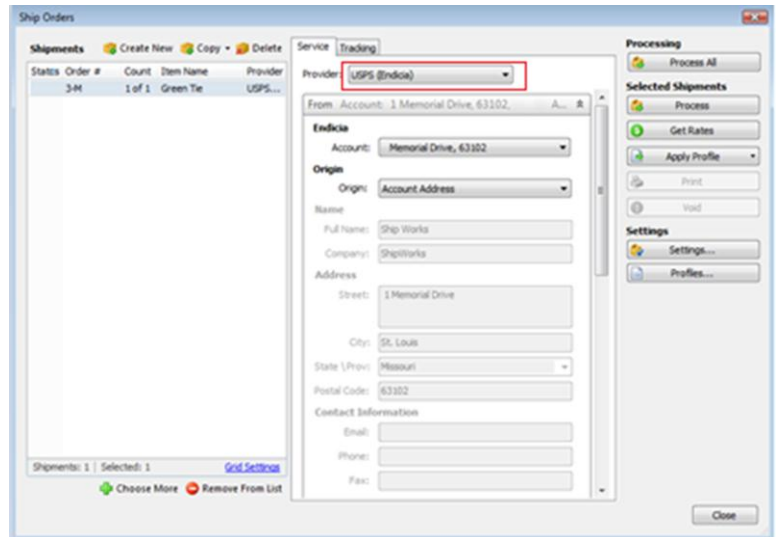
V. Putting It All Together: Printing a Label

If this guide was a movie, a montage would be playing right now. The camera shots would be spliced together to an energetic soundtrack.* It would feature you training hard, while being supervised by a wise, elderly man.

But to print a label, you don't need to train hard. It's easy.

Here's How in Six Simple Steps:

1. Select an order that you want to process on the Main Order Grid, then go to **Home > Ship Orders**.
2. Choose a shipping provider. Use the one you already have configured or choose a new one (you will have to repeat the steps in the Shipping Setup Wizard).
3. Edit the necessary information.
 - a. There are four fields under the provider menu: **From, To, Rates, and Shipment Details**. Under the **"Shipment Details"** tab, you can select a ship date, shipment weight, packaging, and all that good stuff.
4. Optionally, click the **"Get Rates"** button to display how much this shipment will cost using different delivery options. (The rates will be displayed under the **"Rates"** section...you may have to scroll down.)
5. Click the **"Process"** button. This will automatically print your label. When your order is processed, a green icon with a checkmark will appear.
6. Pat yourself on the back. You did it! Hazzah!



Example 5.1: The "Ship Orders" screen. This is where you can specify more information about your shipment, like shipping provider (in red), shipping service, package weight, and insurance.

*It is recommended that you play the following songs during this process: "The Final Countdown" by Europe, "Eye of the Tiger" by Survivor, or "You Gotta Be" by Des'ree.

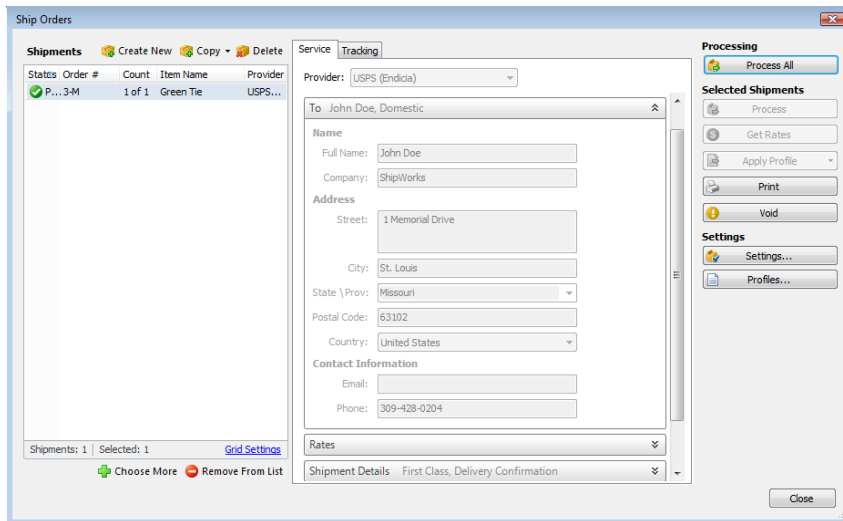
On the Other Hand...Let's Say Things Didn't Go So Well.

1. I made a mistake, but my order is already processed. Help!

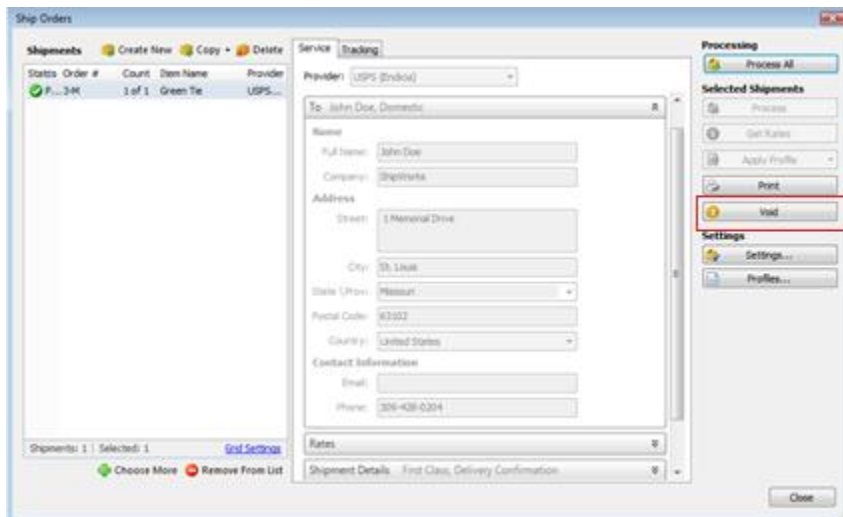
You can void a shipment in ShipWorks, which will void the postage charges and allow for reprocessing.

To Void a Shipment

If you need to void a shipment (because you entered a wrong weight, address, or any of that kind of stuff), just go back to the “Ship Orders” screen. Highlight your order and click “Void”. That's it.

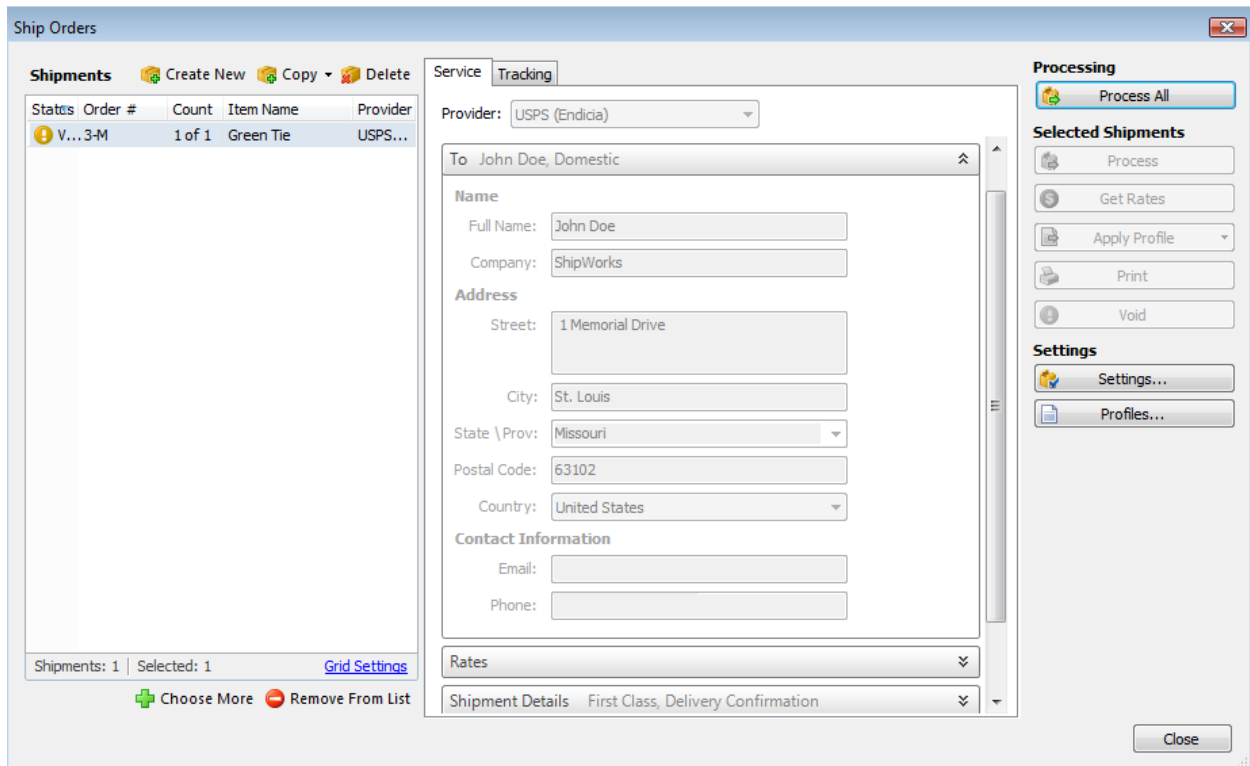


Example 5.2: A shipment that has been successfully processed. Note the green button that appears next to the shipment (left).



Example 5.2: Clicking on the “Void” button (right) will void your shipment, including your shipment's postage.

Your shipment will be voided and your label will be invalid. The green button will be replaced by a yellow one. (And instead of a checkmark, it will show an exclamation point.)

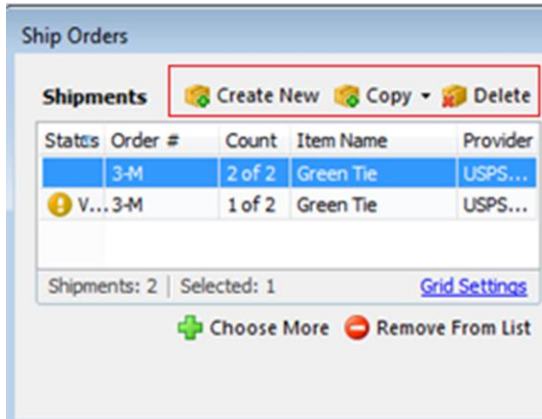


Example 5.3: A successfully voided shipment. Notice the yellow button next to the shipment (left).

Pro tip: The difference between “void” and “delete” in ShipWorks is important. **To void any postage purchases, you must void your shipment.** Voiding your order will void postage, but keep your order in the ShipWorks database. Deleting your shipment will remove the order entirely from the ShipWorks program.

You’re now ready to re-create your shipment.

To Create a New Shipment



Example 5.4: Creating New / Copying / Deleting shipment information.

Click **“Copy”** to create a new shipment with the old order information, and you can edit the order easily. (This is a time saver.)

Click **“Create New”** if you want to create an entirely new shipment manually.

Clicking **“Delete”** will delete the shipment entirely from the ShipWorks program.

Now you’re back on track and ready to reprocess that shipment. Go ahead and click the **“Process”** button. All the cool kids are doing it.

2. There’s an error regarding my store’s address. I tried editing it on the “Ship Orders” screen, but it still won’t change when I process my shipments. Help!

If you need to change your store’s origin address, you can edit it by going to the **Manage > Stores > Edit**. Make the necessary changes and you should be set.

3. My printer isn’t printing. What is going on?

Let’s take a look. There’s no way to automatically tell what is wrong, but we can do some process of elimination work.

Troubleshooting Printing

Are your printing rules correct?


1. To check your printing rules: **Go to the Manage > Shipping Settings > (Choose Your Shipping Provider)**. Click the Printing tab.


The rules should be set as:


Output Rules

ShipWorks will print using the first template in each group that satisfies the condition.

Labels ABC

 If the shipment is in print with


 Otherwise [Always](#) print with


 Add

Example 5.5: Default shipping rules.

Some providers also include rules for international shipments. So you may see:

Commercial Invoice ABC

 [If the shipment is in](#) print with

 Add

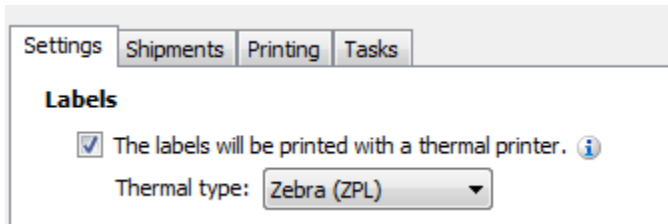
Example 5.6: Additional rules for commercial invoice (FedEx / UPS only).

Make sure that these are the settings and that no other rules are added (or conflict) with them.

Everything good? Let's move on.

What type of printer are you printing with?

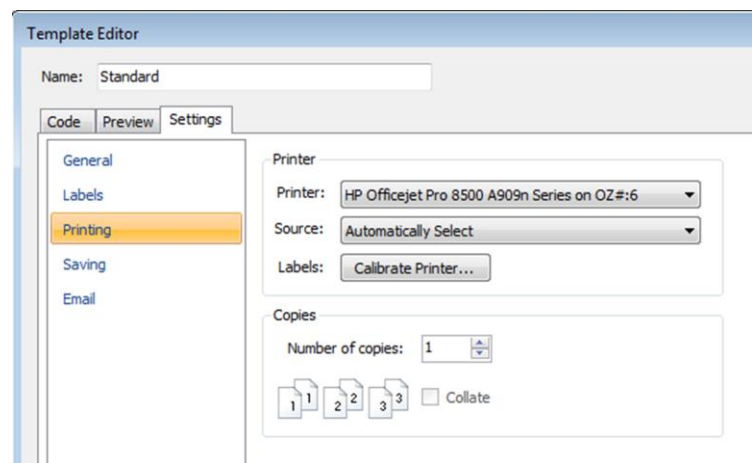
1. Make sure you know if your printer is a standard or thermal printer by checking its documentation (or doing a quick internet search for the make/model of your printer).
2. Double check that you are downloading the labels in the correct format by going to **Manage > Shipping Settings > Select Your Shipping Provider > Settings Tab.**



Example 5.7: Applying thermal settings to your shipping setup.

Are your templates connected to the correct printer?

1. Go to the **Manage > Templates.** Click on the **“Labels”** folder.
2. Right-click the **standard template** and click **“Edit”**. Go to the **Settings** tab and select **“Printing”**.
3. Choose your **standard printer** and click **“Save”**.
4. Right-click the **thermal template** and click **“Edit”**. Do the same for the thermal template. (If you’re not printing with a thermal printer, don’t worry about it.)
5. If you are printing **commercial invoices**, repeat the steps. Choose your **standard printer**.



Example 5.8: Routing your printer to your template.

That was easy, right? Try printing another label.

Please note: If you processed your shipments previous to adjusting these rules to the defaults, **you will need to void the shipment/label, and create a new shipment for any changes to your printing setup to take effect.** The reason for this is that the label is stored in ShipWorks. If it was previously downloaded in the wrong format, it will still give you an error unless you void it. Creating a new request for the label server (basically, what happens when you click the “Process” button) will allow ShipWorks to download new information, and allow you to check your printing settings with the most recent configuration in ShipWorks.

If this doesn’t work, please [contact the customer care team](#) for further assistance.

That’s it. You should be up and running with ShipWorks.

You might be saying, “That’s it? But I want to [do something ridiculously complicated]…”

You’re right. That’s not it. We’re working hard to bring you more [user guides](#) that will help you set up filters, more advanced printing rules, and other things to make ShipWorks work for you.

In the meantime, if you need more help, please don’t hesitate to [contact us](#) at (800) 952-7784. (Remember our support hours are Monday-Friday, 8:00 a.m. -5:00 p.m., CDT.)

This is only the beginning.