ShipRite Software

Quick Start Guide

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What is ShipRite Global Connect Version 10?

Shiprite Global Connect Version 10 is a Windows based shipping system for your Mail and Parcel center. ShipRite offers a multi-carrier shipping platform with all four major carriers: UPS, FedEx, DHL, and USPS. Integrated into the software is a complete point of sale system that will handle all of your register and account needs for your store.

ShipRite is partnered with Merchant Warehouse to provide credit card integration into your store at no setup cost to you. This service is optional within the Shiprite program.

ShipRite is also partnered with Stamps.com and Endicia.com to provide USPS services in a real time environment. You can print postage for your Priority Mail™ and Express Mail™ needs. This is also provided at no additional cost.

ShipRite is a licensed third party developer for QuickBooks™. To use this integration, you must have QuickBooks™ Pro 2005 or later and Windows XP.

ShipRite Global Connect is certified as a third party software solution with UPS, FedEx, and DHL International.

Using the ShipRite User's Guide

This document is meant as a quick start guide to setting up your software and to provide quick examples of particular transactions to get you running quickly. Additional information is available through the means listed below.

Additional Support Resources

Web Support: **http://www.shipritesoftware.com**

Email Support: **support@shipritesoftware.com**

Online Support Ticket **http://support.shiprite.net/**

Phone Support: **315-733-6191 (Monday-Friday 9am-7pm eastern)**

Fax Support: **315-733-6194**

Software Help: Press the 'info' section on the main screen to access an online copy of the user's manual. You may also use the links on the main screen to access help for DHL, UPS, FedEx, USPS, or to access our website.

Setup Steps to Follow:

Appendices:

Step 1 – Checking Hardware and Computer Requirements

To run Shiprite Global Connect properly and efficiently, the following requirements must be met. Check your hardware with the checklist below to make sure you have all that you need to run the program. Hardware purchased from ShipRite is fully supported in all cases. You may purchase anything on this list from us by calling our support line.

Computer Requirements

Processor Speed:	Pentium III class processor or equivalent, 1.2Ghz minimum for Vista.
Operating System:	Windows: XP Pro, XP Home, ME, 2000, 98, 2003 Server, Vista, 7
RAM:	64 MB (128 MB for XP systems, 1GB for Vista)
Hard Drive:	Any (Program uses approximately 100 MB of space)
Serial Ports:	Minimum 1 Port
Parallel Ports:	Minimum 1 Port
USB Ports:	Minimum 4 Ports
Software Installed:	Adobe Flash player, Microsoft Word 2000 (Microsoft Office is strongly suggested), Microsoft Outlook (Email Functions), FedEx Web Services

Hardware Requirements

Scale: Scales may be serial or USB Port ONLY.

> **Supported Scales:** Mettler Toledo PS-60 and PS-6L

> **Compatible Scales:** Toledo PS-60
> Toledo PS-6L
> Toledo 8213 Bench Scale
> Detecto AS-350D
> Fairbanks SCB-2453 Series
> Fairbanks Ultegra Bench Scale

Thermal Label Printer: Thermal Printers must be attached via parallel or usb connection only. USB printers are currently not supported.

> **Supported Printers:** Eltron LP2442
> Eltron LP2844

Receipt Printer: Receipt printers may be attached to either a USB port, Parallel to USB conversion cable or directly through a serial port if an extra serial port is available.

Supported Printers:

> EPSON TM88-IV Partial Cut
> CITIZEN CT-S2000
> CITIZEN CT-S310

Compatible Printers: EPSON TM90 Partial Cut
EPSON U200 Partial Cut
Citizen Printers
IDP Printers
Star Printers

Note: In most cases, the compatible printers will not work in conjunction with the cash drawer to fire open the drawer at the end of a sale. They will however print a suitable receipt.

Cash Drawer: Cash drawers are connected to the receipt printer via an RJ-12 cable that is usually provided with the cash drawer.

> **Required Cash Drawer:** MMF Legacy Series Drawers

Bar Code Scanner: The bar code scanner is connected to the computer either by a keyboard PS2 wedge, or by USB connection.

> **Suggested Scanner:** Metrologic Voyager USB Scanner

Credit Card Swiper: The credit card swiper may be connected to the by USB connection. Credit Card swipers must be configured for use. ShipRite also offers hardware packages that come with a built-in credit card swiper.

> **Supported Swipers:** IDTech MiniMag USB reader

> **Compatible Swipers:** Selected Cherry Keyboard swipers

Laser Printer: Any laser printer can be used with ShipRite Global Connect. The printer may be either local or networked.

> **Supported Printer:** Monochrome Laser Printer

Keyboard: Any PS2 or USB compatible keyboard may be used.

Mouse: Any PS2 or USB compatible mouse may be used.

Step 2: Connect all Hardware to the Computer

To connect your hardware to your computer, follow the set of instructions included with your hardware purchase. Below are a few simple reminders on how to plug in your hardware.

Hardware Item	Connect To	Where
Scale	USB or Serial	Back of Computer tower
Thermal Label Printer	Parallel or USB	Back of Computer tower
Receipt Printer	USB Port or Serial Port	Back of Computer tower Back of Computer tower
Cash Drawer Bar Code Scanner	Receipt Printer USB Port or Keyboard Wedge	Back of Receipt Printer Any available USB port Plug Y Cable into tower and keyboard.
Card Swiper	USB Port	Any available USB port
Laser Printer	USB Port	Any available USB port
Keyboard	PS2 Port USB Port	Back of Computer tower Any available USB port
Mouse	PS2 Port USB Port	Back of Computer tower Any available USB port

How do I tell the difference in the Ports?

The ports on a computer are easy to distinguish due to their different sizes. The following ports are described as the following.

USB Port: This port is small and rectangular (3/4" x ¼") and is usually used for printers and small items such as mice, swipers, and keyboards. USB ports are found in the back of the computer, and in some cases, extra ports are available on the front or side of the tower.

Serial Port: This port is a small trapezoidal port about 1 inch in length. There are 9 pins, 5 in the top row, and 4 in the bottom row. This port is used for the scale, and in some cases a receipt printer.

Parallel Port: This port is long, about 2-3 inches in length and has holes to accept pins from the printer cable. This port is used in ShipRite for the Thermal Label Printer. Extra ports could be used for other printers if needed.

PS2 Port: The PS2 port is a round plug with 9 pins shaped in a semi-circle around one side of the port. This port is used for Keyboard and Mouse only. If you have a Bar Code scanner with PS2 connection, you must use a keyboard wedge.

Step 3: Installing ShipRite Global Connect Version 10

Note: If you bought a complete hardware setup from ShipRite Software, then the software is preloaded and you may continue to the next step in this guide.

A. Installing the Program

To install the program, place the Installation CD into your CD-ROM drive on your computer. The install program will automatically start after five to ten seconds.

After pressing 'Next' at the welcome screen, you will come to the End User's License Agreement, or EULA. Read through this document and decide to accept the terms or not. You must accept the EULA for the install to continue. Select Accept or Not Accept and then click 'Next' when you have decided.

Enter your User Name and Company Name then click on 'Next' to continue.
Click on 'Install' to start the installation.

Click on 'Finish' to end the installation.

The installation of your software is now complete.

B. Installing your Setup Files

Your setup files are a batch of files containing your ShipRite main database, your prices for shipping, your Zone files, and your Registration Key. These files are custom made for your store upon your purchase. The program will not run without these files.

These files are included in your ShipRite install CD. To access these files, start at your Windows desktop. Double left click on the 'My Computer' icon to open up the drive window. If you do not have the icon, you can also do this by clicking on your Start button and selecting My Computer. Right click on your CD Rom drive that contains the SR_Install and select '**Explore**' by left clicking the menu option. Find and double left click on the Install folder.

Inside the Install folder the file you will need to search has the following naming scheme: **Reg_Key_Lastname.exe** Double left click on this file to bring up a small extractor window. Click on Unzip, and then when the message pops up that it is complete; click on Close.

You are now ready to setup your ShipRite Software!

Step 4: Running ShipRite for the first time

You are now ready to run ShipRite for the first time. To run ShipRite, double left click on the ShipRite Global Connect icon that is on your desktop. The opening screen will run and load all updates as needed, and will cache all of your pertinent shipping information. The main shiprite screen will look like the following:

Some major setup and support features of your program are the following:

1, Web Links – This link menu will connect you with ShipRite support, links to our software partners, and useful shipping links from UPS, DHL, FedEx, and USPS.

2.   Setup Menu – This menu will connect you to setup information including your registration information, point of sale setup, printer setup, and general shipping information.

3.   ShipRite Online Manual Link – Clicking this info button will give you access to a current online copy of the ShipRite Global Connect User's Manual.

Step 5: Setting up General ShipRite Options

The next step to complete is the setup of general program options. These are kept in the setup menu off of the main shiprite screen pictured in Step 4. To access the general setup options we will single left click on the Setup choice in the top menu. We will then single click on 'General Setup Options' to enter our options screen.

Your *ShipRite Global Connect v10* manual will have all the details you need to set up your general ShipRite options.

Step 6: Setting up Point of Sale options

After your general setup options are completely set up, we can now set up the options for your point of sale. These are also located in the General Setup Options section of the program. If you

do not plan on using the integrated point of sale with your software, you may skip this step. Otherwise, consult your *ShipRite Global Connect v10* manual for detailed instructions.

Step 7: Shipping Carrier Setup

Carrier setup is the next step to be accomplished in our quick setup guide. ShipRite currently supports UPS, FedEx, DHL-Intl, and USPS. Setup options for each carrier can be found in the General Setup Options under Carrier Setup. Your *ShipRite Global Connect v10* manual will outline how to set up each individual carrier. ShipRite support will also provide a quick setup sheet that will be included with this guide.

Step 8: Shipping Service Setup

Service setup is a very important part of your Shiprite software. This area is covered in the Master Shipping Table part of your program. To access the Master Shipping Table, we need to be in the starting page on the screen. Click on the Actions menu, and slide it down to Table Management. In the new extended menu, you will see an option of Master Shipping Table. Your *ShipRite Global Connect v10* manual will have details on this part of the program. Appendix A in this guide will give you the current accessorial charges for each carrier. Appendix B will give you a short tutorial on how to use the Master Shipping Table.

Step 9: Setup Inventory and Departments

Now that our setup options are done, we can focus on entering in point of sale items. Inventory can be setup from inside the point of sale, from the front Actions menu, or from your general setup options. The *ShipRite Global Connect v10* manual will have in depth instructions on how to enter your inventory into the system, and set up your individual point of sale departments.

Step 11: Install FedEx Web Services

Federal Express shipments in ShipRite work off of a live FedEx Web Services. To install this program, consult your *ShipRite Global Connect v10* manual for complete instructions.

Step 12: Install Endicia.com Client

ShipRite provides the opportunity to use endicia.com for all of your Postal Service needs. If you wish to use Endicia.com in conjunction with ShipRite, you will need to install the dazzle program as well as Dymo Printable Postage Program. This free download is available on the endicia.com website upon signing up with them. Please visit **endicia.com/shiprite** to receive 60 day free trial. After installation, refer to your *ShipRite Global Connect v10* manual for any additional instructions.

Step 13: Schedule Training

Your purchase includes one free hour of on the phone, live training. To schedule your appointment, call our support line and speak to a Shiprite support representative. Additional training beyond one hour is available for an hourly fee.

Congratulations, you are now ready to start using your new ShipRite software. Consult the manual for anything you may need to help run your software smoothly and easily. You will find that ShipRite will increase your productivity, and allow you to manage your business to its fullest potential.

Appendix A: Accessorial Charges for Carriers

*Please note that all of the accessorial charges are preset in your system and you will need to check back with our website prior to January 1st of the starting year. Please visit http://www.shipritesoftware.com

Appendix B: Using the Master Shipping Table

The Master Shipping Table is located from your main ShipRite start screen under the Actions menu. Single left click on the Actions menu, and then move the mouse to the **Table Management** option. A side menu will open with a few options. The Master Shipping Table is the first option in the list. This screenshot below illustrated where to find the option.

This will access you to the Master Shipping Table. You will see options to select a specific carrier and a specific service. From here you can change information for each shipping service you offer. We will cover the initial setup options you will need for your services. To select a carrier, click on the Carrier Selection box, and choose which carrier you wish to view. The select a service, single left click on the particular service in the Service Selection box. The Master Shipping Screen when a service and carrier are selected looks like the following:

Major Features

1. Carrier Selection drop box. Single click on the grey box arrow to select a carrier.
2. Service Selection box. Single left click on a service to view its shipping options.
3. Service Option display tabs. This has all of your shipping options data.

Viewing and Changing Options

To view and change particular shipping options, click on any of the four available tabs in the display screen. The tabs are General, Options, Percentage Markup, and Accessorial Revenue.

General: The UPS account number must be typed in for all UPS services here. This is done by default by ShipRite if you provided the account number at time of purchase.

Options: This tab controls shipping options for each service. The options will appear in two columns, OFF and ON. Depending on the service, your options will vary. Generally, the options you will need for each service is the following:

Air Services OFF	Air Services ON
Consignee Not Required	Air Service
Disable This Service	Letter Express 8 oz
Freight Service	Saturday Delivery
Popup Messages	Saturday Pickup
Shipper Not Required	Surcharge for Residential
Shipping Kiosk	Use Dim Weight

Ground Services ON   Ground Services OFF
Surcharge for Residential   All other options OFF

As always, consult your *ShipRite Global Connect v10* manual for an in depth listing of each option.

Percentage Markup: This section is where you will set up your markup for all *packages* that are processed in ShipRite. Letters are marked up in the Accessorial Revenue tab. There are four total tiers to setup in most carrier cases. Three are normal level tiers, and one tier is for Retail rates. The three tiers can be adjusted in your General Setup Options. Tiers are based off of the base shipping rate. By default the tiers are set up as below:

Tier I   : $0.00 to $9.99   base shipping cost

Tier II : $10.00 to $19.99   base shipping cost

Tier III : $20.00 and above   base shipping cost

What are Retail Rates?

Retail rates are a tool that is designed to be used to help you compete with both the UPS Store and the FedEx/Kinko's chain of stores. We have provided their base charge for packages, so you can compare your markups. You can also use this feature to "undercut" the competition. For example, by placing a -10 in the Level R markup, you will charge 10% less than the UPS Store or FedEx/Kinko's. The *ShipRite Global Connect v10* manual will have instructions on how to access Retail Rates in your program.

Accessorial Revenue: Accessorial Revenue is one of the most important sections in this entire area. These charges control the non-shipping fees for each carrier and service. Examples would include Residential Surcharge, Insurance Fees, Additional Handling, and Delivery Area Surcharge. **Appendix A** provides you with the current year's Accessorial Fee's.

When changing an accessorial fee, make sure you always click "Update Now" after every change. If you do not, the program will not save the table correctly.

Also included in the Accessorial Table is your **Letter Markup Fee**. This fee applies to all Letter packages that you ship through the program. There are two types of markup you can use. One is a flat charge fee, and the other is a percentage markup.

What is that Global Update button?

The global update button is a time saver that will help you apply Accessorial Charges for every single service for a particular carrier. For example, if you wanted to change the Residential Surcharge for all UPS services to 2.50 charge and 2.50 cost. You would apply those changes and hit "Update Now". Next, bring the Residential Charge up again, and click on Global Update. You have now applied this charge for all Residential Charges for all UPS Services.

Appendix C: Shipping Screen Basics

The shipping screen, or ShipMaster, is your shipping center in the entire ShipRite program. From this screen, you can process every single package that comes into your place of business. This tutorial will deal with the basics you will need to know to use your ShipMaster as the heart of your program.

The ShipMaster may be accessed in one of two ways. You may either access it through your Point of Sale or you can click on the Ship icon in your opening ShipRite screen.

Note: It is highly suggested that you use the Point of sale function so that you can record all of your shipping transactions in a complete and accurate manner. You can shut off the front button access by turning on "Force POS Shipping" in your General Setup Options, under the Options tab.

Maneuvering Around the ShipMaster

To properly maneuver through this screen, you should use the TAB key on your keyboard. This will move you in the correct order to accurately rate your shipment. You can also use the mouse as well as a touch screen monitor, but we suggest you use the tab key until you are familiar with the proper order of operations.

Major Shipping Screen Features

1. Weight Display and Entry
2. Ship From and Ship To information
3. Insurance Declared Value
4. Package Dimensions and Packaging Type
5. Function and Fee buttons
6. Package and Surcharge information
7. Shipping Options (4 panels, use the scroll bar to view the fourth)

Weight Display and Entry: This section is where your scale will display the weight of the package on your scale. If you do not have a scale setup, you can type the weight in with a decimal format. So if your package was 10 pounds, 8 ounces and you had to type it in manually, you would type in 10.5.

Ship From and Ship To: This section contains the details of where the package is going. By default, your place of business will be listed in the Ship From. You should always have this information in your system at all times. Do not leave this section blank.

Package Dimensions and Type: This area controls the actual size and package type of the shipment. Dimensions are needed to properly process checks for oversize, and dimensional weight. The packaging type is used to designate either a particular Carrier sized box, a Letter envelope, or other packaging.

Function and Fee Buttons: These buttons control addition features your customer may wish to add to the package. The entire signature options are located here, as well as COD and additional handling options. If you wish to charge a fee, click on the appropriate button.

Note: Shiprite will automatically apply rules for Additional Handling as far as dimensions are concerned. It is advised to check with each Carrier's guidelines for Additional Handling Fees.

The bottom of the section contains function buttons. These include international options, reporting options, turning on or off Stamps integration, and exiting functions.

Package and Surcharge Information: The panel below the weight will indicate to you which charges are being applied, and also handy information for size. Information will include commercial or residential, the girth of the package, oversize 1, 2, or 3, additional handling, COD, and delivery confirmation. These flags are easy to read and are initialed in a logical way.

Shipping Options: These 4 panels contain the options you can offer your customer for shipping. These buttons when clicked will guide you to the printing label portion of the program. If an option is not available, the button will not appear on your screen.

What are the minimum requirements to properly quote a shipment?

1. Weight
2. Ship From information
3. Zip Code of the Ship To address
4. Dimensions
5. Extra service fees requested (Insurance, Delivery Confirmation)

Appendix D: Creating Inventory Items

This guide will help you understand the two common methods of adding inventory into your ShipRite program. These methods are manual entry, and bar code scanning. The program will refer to two different terms, SKU and PLU. These terms mean exactly the same thing. It is the data inside that is used to look up an item and charge your customer accordingly.

Opening the Inventory Master

There are three ways to access your Inventory Master. One is through the Actions menu on your start screen. Another method of access is through your Point of Sale, via the PLU menu. The third, and least common method, is to go through your General Setup Options -> Global Features tab and select Form – Inventory.

The inventory screen unless turned off in options, will appear as a large spreadsheet with all of your SKU's listed in alphabetical order. A few of the main features are listed below.


1. Inventory spreadsheet display
2. Add/Edit Inventory buttons
3. Search and filter features

How do I select an inventory item in the spreadsheet view?

You can select an item by simply single left clicking anywhere on the row with the inventory item you wish to view. You can get into the detail screen by double clicking the particular SKU.

Creating a New Inventory Item

To start the creation process, we will first need to enter the Inventory Detail screen. We accomplish this by clicking on the "Add" button that is in the top left corner of the Inventory Master. Clicking this button will place you on the detail screen, which looks like picture below.
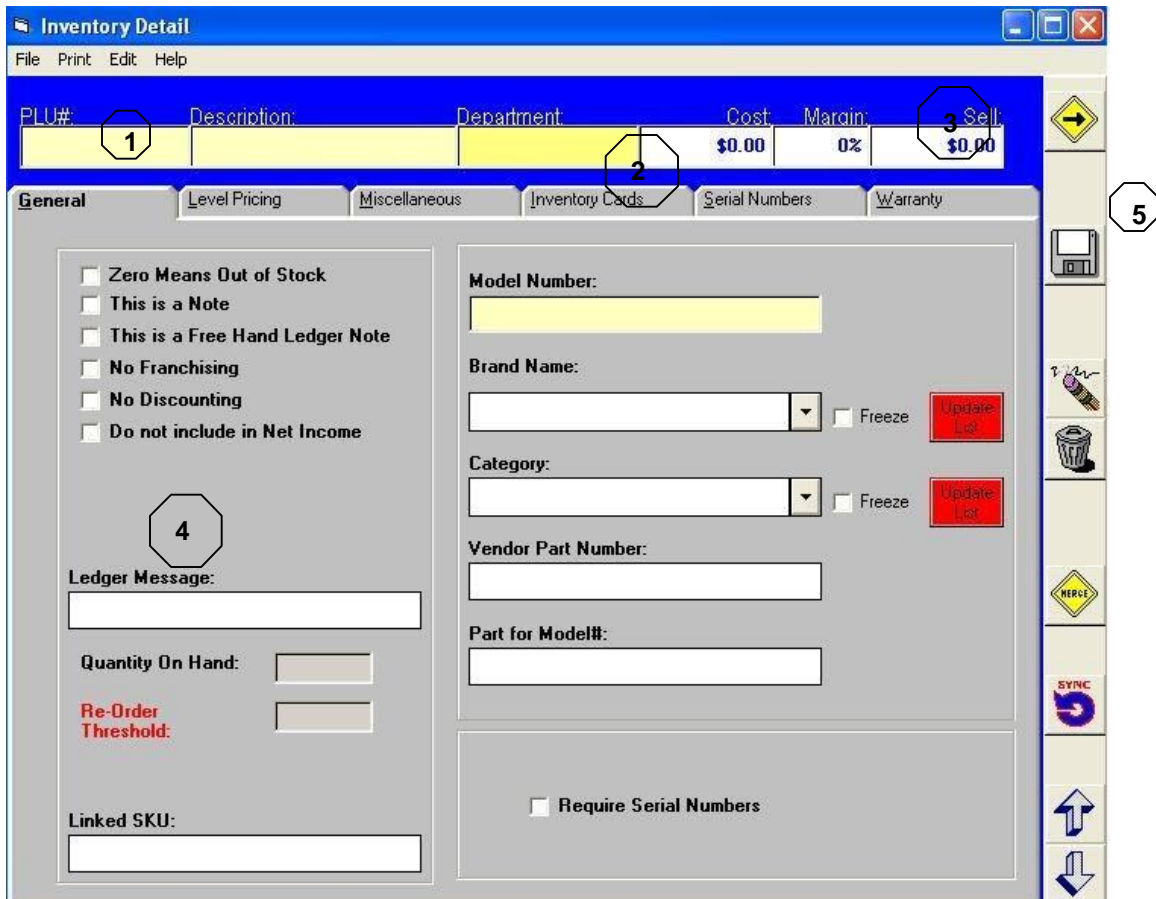
Key Features of the Inventory Detail Screen

1. SKU, or PLU name
2. Department Assignment
3. Cost and Sell entry
4. Inventory Options
5. Function Bar

To assign a PLU to a new item there are two methods, the bar code method, and manual entry method. To use this method, make sure the cursor is in the PLU section.

Manual Entry: Just type in the name of the SKU you wish to make your item.

Bar Code Entry: This method is primarily used for people who wish to have their inventory UPC or Bar Code driven. Take your bar code scanner, and scan the UPC code of the object you wish to enter into inventory. A secondary screen will pop up. *Exit this screen there is no need to enter information on this screen yet.*

The next step is to assign a department to your new inventory item. To do this, you will need to double click on the department assignment window and select a department out of the choices that will pop up on your screen.

Finally, assign your cost and your sale price. The margin will automatically calculate based on what you enter into the cost and sell price fields. You can also enter just the cost, and a margin percentage, and the program will then calculate your sale price.

Your *Shiprite Global Connect v10* manual will be able to give you a more detailed look at all of the inventory functions. This appendix is meant as a quick guide to what you need at a minimum to create inventory in your program.

Appendix E: POS Screen Basics

The POS screen can be considered the nerve center of your ShipRite program. From here you can launch everything you need to service your customer, and record the data entered for all of your bookkeeping needs. This tutorial will teach you the basics you will need to know to become familiar with your POS program.

For this tutorial, we will be using the default Simple Point of Sale. There is an option for a different POS style called Standard. The details of that Point of Sale will be available in the *ShipRite Global Connect v10* manual.

Simple Point of Sale Key Features

1. Real Time Receipt View
2. Simulated Pole Display and data entry pad.
3. Speed Buttons

4. Function Buttons
5. Customer Information Display

What are the general steps I need to accurately record a sale?

When you first enter the point of sale, the first thing you should do is enter the customer information into your point of sale. This is done so you can record important information about your customer, so that you can use the marketing features within ShipRite to help retain them as customers. After you have recorded the customer information, the customer will appear on the bottom grey bar of your screen.

Any important information about the customer can be accessed here with a single right click. To ring in the sale, you can use a combination of your bar code scanner, and the speed buttons on the right hand side to record the individual items of your sale.

Your *ShipRite Global Connect v10* manual will have complete instructions on the unlimited options and power of your point of sale. When your sale is complete, you may use the receipt or no receipt button to proceed to the Payment entry screen. Recording payments are covered in your manual.