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WELCOME

1. INTRODUCTION

Thank you for purchasing ShipRite software, the first step towards building a successful business. A successful business depends largely on maintaining accurate records and making informed decisions based on these records. Other factors such as store location, products offered, services provided and competitive price points also play a significant role in the success of one's business. ShipRite software makes running a business easier than ever by keeping up to date with the latest carrier mandates, by providing competitive, affordably priced software and hardware, and by providing our customers with exceptional support services.

ShipRite uses a three-prong approach to help develop and maintain one's business. The first step is to collect data through daily transactions to store in the ShipRite database. ShipRite software's methods for data collection are superior to any other available options by offering a multi-point-of-sale system with a push button interface.

Secondly, ShipRite collects the business data and consolidates it into printable reports that may be used for making strategic business decisions. ShipRite software uses Microsoft Access to store its databases, which makes it easy to create custom reports and import reports into spreadsheets such as Microsoft Excel to analyze and graph performance.

Lastly, ShipRite helps to connect with customers to create an individualized experience that will keep them coming back. By utilizing ShipRite software's integrated marketing tools such as Letter Master and Contact Manager, it is easier than ever to focus advertising dollars on the customers who provide the most business, as well as offer personalized discounts and rewards.

2. FEATURES

❖ FULLY INTEGRATED POINT OF SALE

ShipRite software provides all functions from point-of-sale such as mailbox rentals, package shipping, letter mailing, and customer account inquiries.

❖ MULTI-POS

ShipRite software allows the user to customize how the point-of-sale will look and behave with a programmable button interface, which provides the ability to best fit the needs and demands of one's business.

❖ SHIPPING MASTER

ShipRite software provides an easy-to-use interface for shipping both domestic and international packages. By displaying the shipping cost of all carriers on one screen, it is easy to offer customers the most affordable shipping method available.

❖ PACK MASTER III

ShipRite software provides a packaging module that quickly calculates the cost for an unpacked item, allowing quick, custom packaging services.

❖ MAIL MASTER

ShipRite software handles all USPS mailing through the Mail Master, which provides support for 5 different scales and quickly calculates all mail choices for fast selection and importing into the POS.

❖ LETTER MASTER

This is ShipRite software's comprehensive marketing manager which is used to query the database and provide business related information regarding the customers.

❖ ADDRESS BOOK

ShipRite software uses the address book to keep track of customer accounts, shipping and purchasing history.

❖ NETWORK READY

Whether it's one point-of-sale system or many point-of-sale systems, ShipRite software is ready to be networked and accommodate any size business.

Please visit <http://shipritesoftware.com/support/downloads.shtml> to view and download the networking instructions.

❖ WINDOWS OS COMPATIBILITY

ShipRite software is compatible with the latest version of Windows 7, Windows 8 and Windows 10.

❖ CURRENT HARDWARE COMPATIBILITY

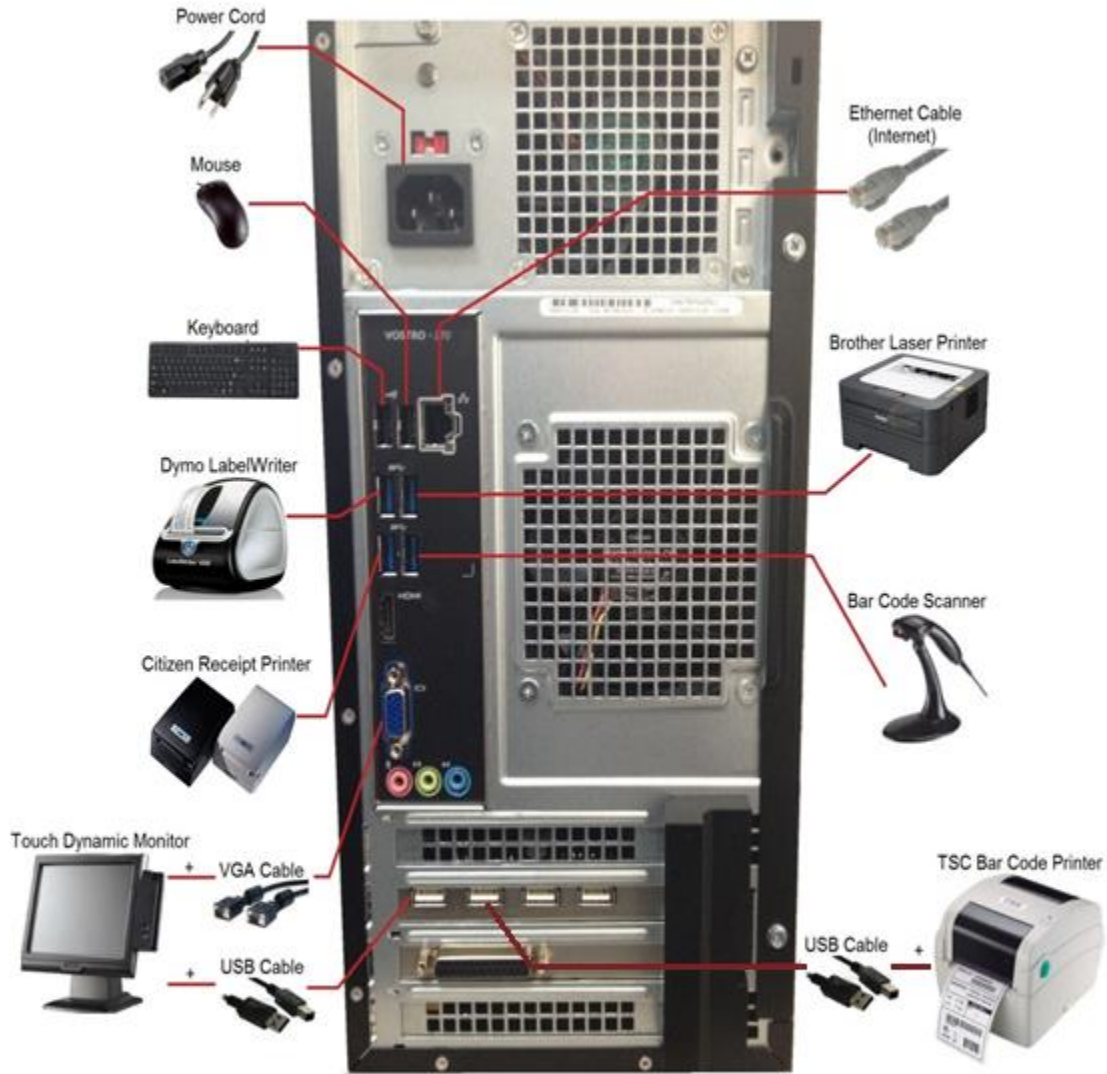
ShipRite software is compatible with most of the current hardware available, meaning that, it is not necessary to purchase all new hardware.

❖ DHL, FEDEX, UPS AND USPS INTEGRATION

ShipRite software integrates with all major shipping carriers, offering the most affordable and competitive rates possible to the customer. For more information, please refer to Chapter 2 – Carrier Setup.

3. PC SETUP IMAGE

This image represents the typical setup of devices to the pc and provides a visual representation of how these devices should be connected.



4. SYSTEM/SOFTWARE REQUIREMENTS

- ✓ Windows 7, 8, or 10.
- ✓ Intel Pentium processor (dual core) or above (Core i3, i5, or i7)
- ✓ 2 GB RAM or higher
- ✓ Video display driver capable of 600x800 resolution or higher
- ✓ Modem/LAN/Cable/Wireless internet connection or network interface card
- ✓ Thermal Label Printer
- ✓ Laser Printer
- ✓ Receipt Printer
- ✓ Electronic Cash Drawer
- ✓ Bar Code Scanner

5. SHIPRITE SOFTWARE INSTALLATION

- 1.You will be sent a link to download the Program. Save to your desktop. 2.Double click on the file on our desktop. Just keep clicking Next/Next/Next/Install until the program is installed all the way
- DO NOT START THE PROGRAM YET
- Before you start the program.... Find the MY COMPUTER icon on your desktop or go to START: COMPUTER and RIGHT BUTTON CLICK. Select PROPERTIES. Make a note if your computer is 32 bit or 64 bit processor.
- If your PC is 32 bit processor, download this file:
http://support.shipritesoftware.com/SR_Uutilities/CRRuntime_32bit_13_0.msi If your pc is 64 bit processor, download this file:
http://support.shipritesoftware.com/SR_Uutilities/CRRuntime_64bit_13_0_1.msi Follow the prompts to load this utility. When done, click FINISHED.
- Now you need to run the Reports Runtime Engine. To download to your desktop and Run this file....
http://support.shipritesoftware.com/SR_Uutilities/Setup_ShipRiteReports_Runtimes.msi
Double click on the file name and RUN this program
- Double click on the ShipRite Icon on your desktop. When you start the program, you will get a variety of messages, click OK and continue on through. Eventually, after loading several modules like DOT NET, the program will open. It will inform you it is adding to the database. The first few times you run the program, RIGHT BUTTON CLICK on the button and select RUN AS ADMINISTRATOR. Just do that a few times.
- You may get error messages when you start ShipRite. Click OK and the program is terminated. That is ok. Just Right Button click on the ShipRite ICON and select RUN AS ADMINISTRATOR and those messages will be gone!. When you start the program, you will get a variety of messages, click OK and continue on through. Eventually, after loading several modules like DOT NET, the program will open. It will inform you it is adding to the database.

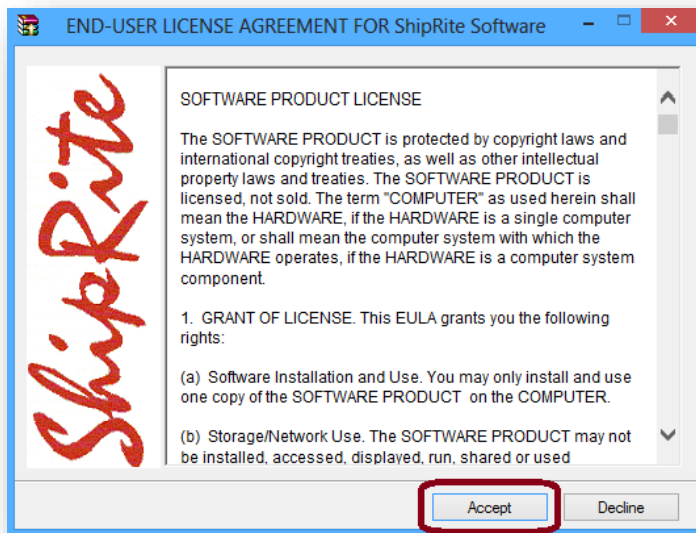
- If you have an issue during loading, please fill in a support ticket and you will be called: <http://support.shiprite.net> . On the left click NEW TICKET. Fill it in and as accurately as possible describe the issue. In the SUBJECT line put LOADING DEMO. Check your spam folder if you do not get an automated email immediately. If still problems with sending a ticket, then just send an email to INFO@shipritesoftware.com
- After you have installed this utility, Start the ShipRite Program again from the desktop ICON. If this does not work, then follow the instructions below to fill in a support ticket and get help from us!

6. SHIPRITE SOFTWARE REGISTRATION

- You will be sent a registration key
- Download the key and save in the Shiprite Folder in your computer's C drive.
- This Registration key contains all the information for your store. You can put it on as many stations within your store at no additional cost.
- Registration is good for one year and will need to be renewed to continue use of the software.

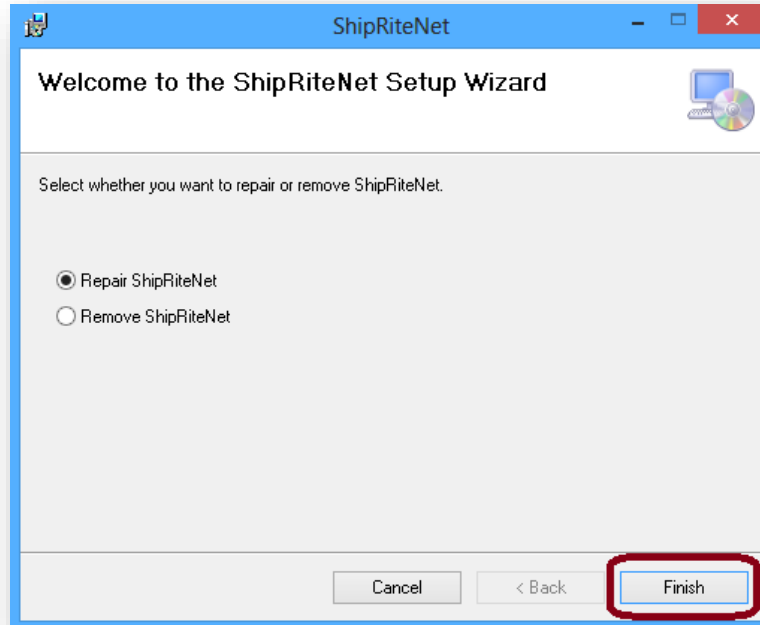
7. SHIPRITE SOFTWARE UPDATE

- Close the ShipRite program
- Open your internet browser and go to <http://main.shipritesoftware.com/updates/> to open the instructions with a link to download the latest update to the software.
- ShipRite will automatically download and run the updating procedure
- Save the file to your desktop.
- Double click on it and install
- Restart the ShipRite software by clicking on the desktop icon
- Click the 'Accept' button to comply with the end-user license agreement

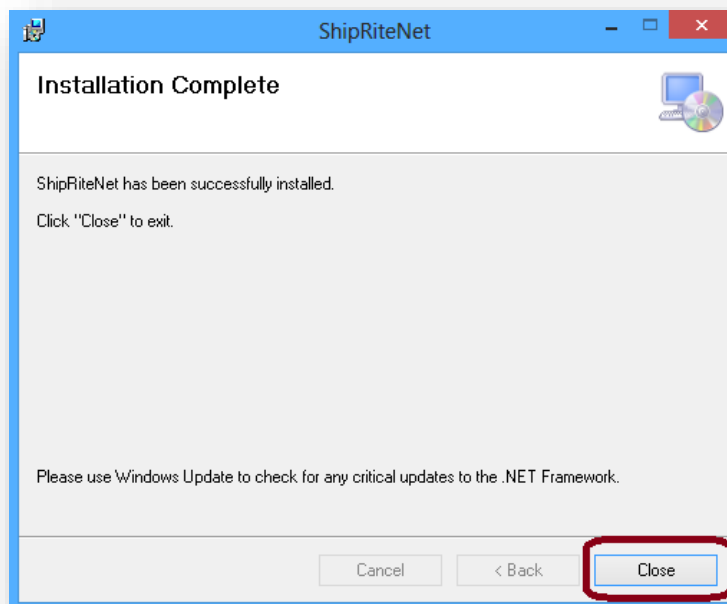


- Click the *'Install'* button to continue

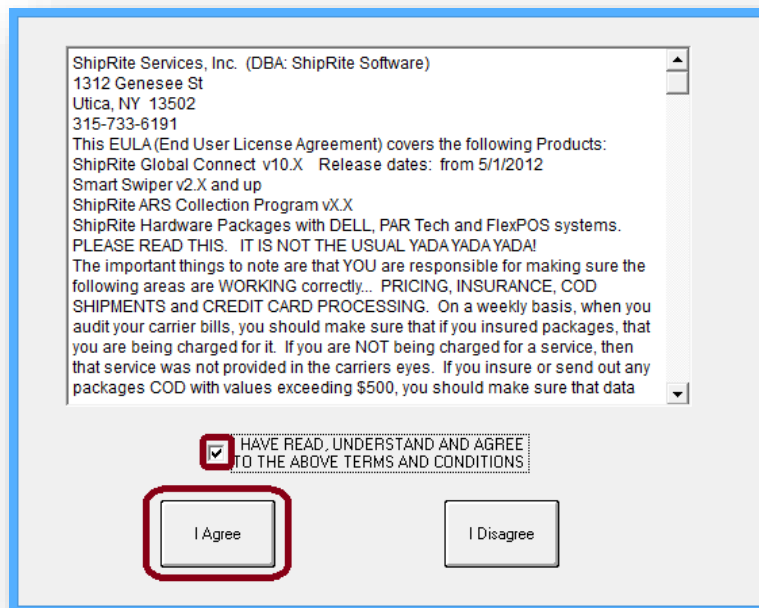
- Click the *'Finish'* button to complete the update process



- Click the *'Close'* button to exit



- Place a checkmark in the checkbox to accept the terms and conditions
- Click the 'I Agree' button



- ShipRite software is now updated to its most recent version!

8. SHIPRITE SOFTWARE TRAINING

The first step in learning to use the ShipRite software, and utilize all of its capabilities, is to read through the manual. Familiarizing oneself with the manual and its contents will provide immediate valuable knowledge into how each component of the program functions. ShipRite provides an hour of live support training with the ShipRite software purchase. To maximize the training experience, first read the manual and the *Getting Started User's Guide*. Further live support training is provided for an additional charge of \$45.00 per hour. Please call (315) 733-6191 to schedule an hour of live support training with one of our ShipRite software technicians.

Here is a list of our training videos to guide you through the program:

- http://support.shipritesoftware.com/SR_Videos/Legacy_Videos/AddressBook.mp4
- http://support.shipritesoftware.com/SR_Videos/Legacy_Videos/ButtonMaker.mp4
- http://support.shipritesoftware.com/SR_Videos/Legacy_Videos/CarrierMarkups.mp4
- http://support.shipritesoftware.com/SR_Videos/Legacy_Videos/ContactManager.mp4
- http://support.shipritesoftware.com/SR_Videos/Legacy_Videos/DepartmentSetup.mp4
- http://support.shipritesoftware.com/SR_Videos/Legacy_Videos/InternationalShipping.mp4
- http://support.shipritesoftware.com/SR_Videos/Legacy_Videos/InventorySetup.mp4
- http://support.shipritesoftware.com/SR_Videos/Legacy_Videos/MailboxRental.mp4
- http://support.shipritesoftware.com/SR_Videos/Legacy_Videos/MailboxSetup.mp4

http://support.shipritesoftware.com/SR_Videos/Legacy_Videos/MailMaster.mp4
http://support.shipritesoftware.com/SR_Videos/Legacy_Videos/OpenCloseProcedure.mp4
http://support.shipritesoftware.com/SR_Videos/Legacy_Videos/PackMaster.mp4
http://support.shipritesoftware.com/SR_Videos/Legacy_Videos/POSOOverview.mp4
http://support.shipritesoftware.com/SR_Videos/Legacy_Videos/ShippingaPackage.mp4
http://support.shipritesoftware.com/SR_Manuals/Refunds_Guide.pdf
http://support.shipritesoftware.com/SR_Manuals/Accounts_Receivables.pdf

SHIPRITE SOFTWARE SETUP

1. PROGRAM SETUP FEATURES

The program setup section of ShipRite consists of five main components.

- ❖ Program Registration
- ❖ Options
- ❖ Global Features
- ❖ Local Features
- ❖ Carrier Setup

To access the program setup:

- From the main menu, click the *'Setup'* tab
- Next, click *'General Setup Options'*



2. PROGRAM REGISTRATION

Program Setup - Shiprite Global Connect

Shiprite Global Connect

Program Registration Options Global Features Local Features Carrier Setup

Warning: Do not change any of the information on this tab, ShipRite Support will instruct you on how to change any information. Changing ANY of the data here will cause your program to stop functioning.

Company Name: Shiprite Software

First/Last Name: Mark Ford

Address 1: 1312 Genesee St

Address 2:

City, State, Zip: Utica NY 13502

Phone/Fax: 315-733-6191 315-733-6194

Registration #: [REDACTED]

Email: support@shipritesoftware.com

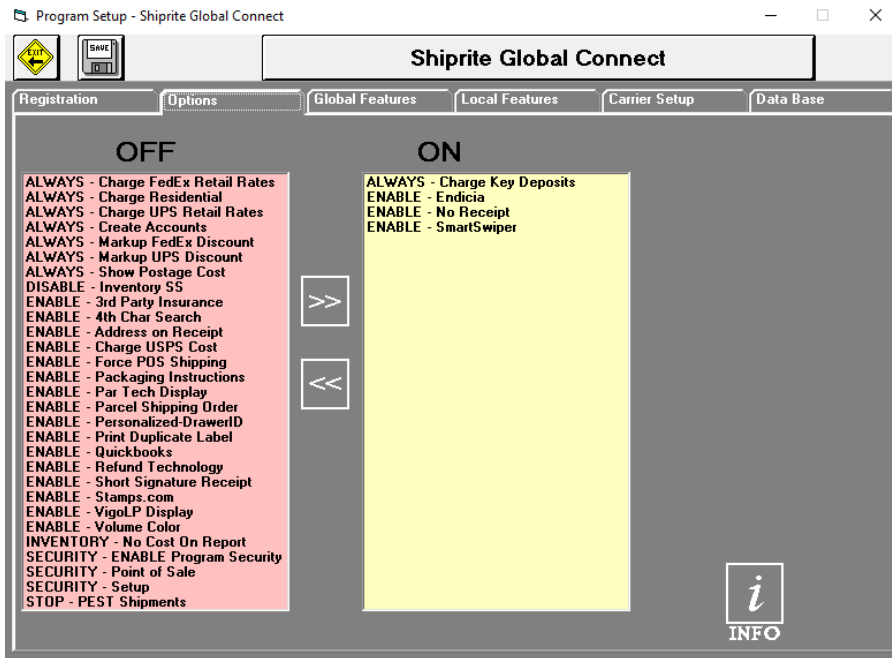
CLEAR

INFO

The program registration section contains all the registration information regarding the user's account. Make sure that the information in this section is accurate. If necessary changes need to be made, please contact ShipRite support to receive a new registration number. Any changes made without a new registration number will void the registration and prevent further use of the ShipRite software.

The only thing that can be changed by the user in this screen is the addition of the store email address.

3. OPTIONS



The options section allows ShipRite to be customized in order to meet specific business needs.

TO ENABLE AN OPTION

- Click on an option in the 'OFF' column to highlight and select it.
- Click the 'double right arrows' button to move the desired selection to the 'ON' column.
- Press the 'Save' button in the upper left corner of the screen to set the changes.

TO DISABLE AN OPTION

- Click on an option in the 'ON' column to highlight and select it.
- Click the 'double left arrows' button to move the desired selection to the 'OFF' column.
- Press the 'Save' button in the upper left corner of the screen to set the changes.

OPTION DESCRIPTIONS

❖ ALWAYS – CHARGE FEDEX RETAIL RATES

Enabling this option will only show FedEx retail rates on the shipping screen, disabling the ability to toggle between base rates and retail rates.

❖ ALWAYS – CHARGE KEY DEPOSITS

Enabling this option will always charge a deposit for the mailbox key when calculating mailbox charges.

❖ **ALWAYS – CHARGE RESIDENTIAL**

Enabling this option will treat all shipments as residential when calculating shipping charges, however, when exporting information to the online carrier's system, the actual commercial or residential charge is transmitted. (**Note:** *This feature is not available for all carriers*)

❖ **ALWAYS – CHARGE UPS RETAIL RATES**

Enabling this option will only show UPS retail rates on the shipping screen, disabling the ability to toggle between base rates and retail rates.

❖ **ALWAYS – CREATE ACCOUNTS**

Enabling this option will automatically create a customer account whenever contact names & addresses are entered in the point-of-sale

❖ **ALWAYS – MARKUP FEDEX DISCOUNT**

Enabling this option, Markups will be calculated on the Fedex Discounted cost instead of the Base Cost

❖ **ALWAYS – MARKUP UPS DISCOUNT**

Enabling this option, Markups will be calculated on the UPS Discounted cost instead of the Base Cost

❖ **ALWAYS – SHOW POSTAGE COST**

Enabling this option will always display the postage on the Stamps.com label.

❖ **DISABLE – INVENTORY SS**

Enabling this option will disable the spreadsheet inventory and only display the inventory form when viewing the inventory setup.

❖ **ENABLE – 3RD PARTY INSURANCE**

Enabling this option will prevent ShipRite from exporting insurance billing to shippers if the store intends to use a 3rd party insurer.

❖ **ENABLE – 4TH CHAR SEARCH**

Enabling this option will prompt ShipRite to search for a contact name match after the 4th character is typed in Shipping Master and point-of-sale.

❖ **ENABLE – ADDRESS ON RECEIPT**

Enabling this option will print the customer address on the receipt for verification.

❖ **ENABLE – CHARGE USPS COST**

Enabling this will allow to charge customer with your online discounted cost.

❖ **ENABLE – ENDICIA**

Enabling this option will allow ShipRite to communicate with Endicia's label server to print USPS postage labels.

❖ **ENABLE – FORCE POS SHIPPING**

Enabling this option will force all shipping to be processed through the point-of-sale.

❖ **ENABLE – NO RECEIPT**

Enabling this option will allow a transaction to be settled without issuing a receipt

❖ **ENABLE – PACKAGING INSTRUCTIONS**

Enabling this option will print packaging instructions to the designated laser printer whenever the Pack Master III is used.

❖ **ENABLE – PAR TECH DISPLAY**

Enabling this option will provide sale information to the customer display on the back of Par Technology systems.

❖ **ENABLE – PARCEL SHIPPING ORDER**

Enabling this option will print the parcel shipping order and invoice disclaimer at the end of an invoice.

❖ **ENABLE – PERSONALIZED DRAWER ID**

By enabling this option your Clerk will have the same DrawerID (based on UserID) after logging in from any POS station on your network. POS Security option must be enabled for this feature to work

❖ **ENABLE – PRINT DUPLICATE LABEL**

Enabling this option will print a duplicate label when a shipment is processed.

❖ **ENABLE – QUICKBOOKS**

Enabling this option will allow ShipRite to export accounting information to Quickbooks when closing.

❖ **ENABLE – REFUND TECHNOLOGY**

Enabling this option will trigger all packages for upload to Refund Technologies. (Note: *UPS only*)

❖ **ENABLE – REPETITIVE INVOICING**

Allows invoices to be automatically generated for repetitive monthly charges.

❖ **ENABLE – SHORT SIGNATURE RECEIPT**

Enabling this option will print a smaller receipt for the customer to sign instead of a full receipt.

❖ **ENABLE – SMARTSWIPER**

Enabling this option will integrate SmartSwiper for Credit and Debit transactions.

❖ **ENABLE – STAMPS.COM**

Enabling this option will allow ShipRite to access the Stamps.com program & account to print postage.

❖ **ENABLE – VIGOLP DISPLAY**

Enabling this option will present a four-line display on the Par Technology VigoXP system.

❖ **ENABLE – VOLUME COLOR**

Enabling this option will provide a background color to a customer's name and address field, to signify that, this particular customer has reached a certain threshold in shipping and sales.

❖ **INVENTORY – NO COST ON REPORT**

Enabling this option will disable the 'Cost' and 'CostValue' columns from showing on inventory reports.

❖ **SECURITY – ENABLE PROGRAM SECURITY**

Enabling this option will prompt users to login prior to entering ShipRite. Depending on user setup, certain areas of ShipRite may be locked.

❖ **SECURITY – POINT OF SALE**

Enabling this option will prompt the user to enter a password prior to making a transaction in the point-of-sale.

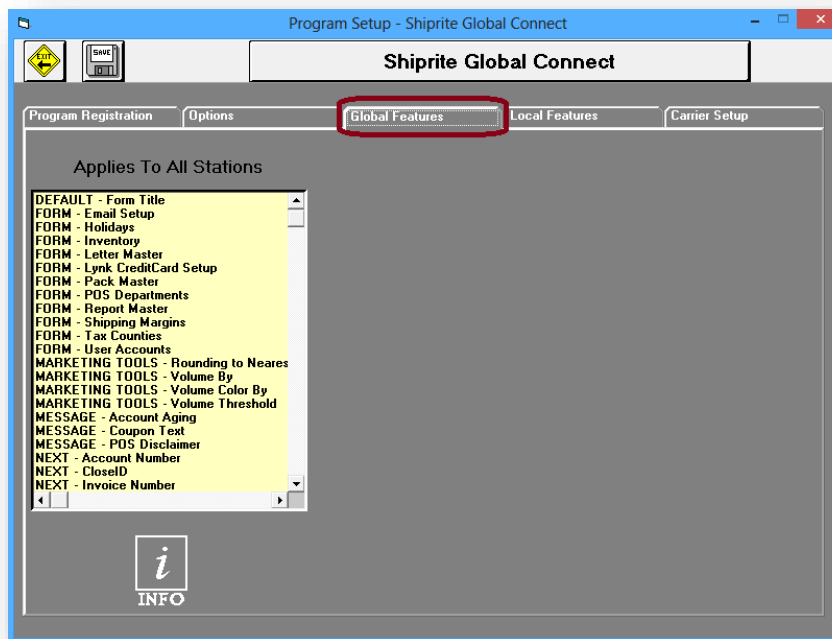
❖ **SECURITY – SETUP**

Enabling this option will provide additional security for program setup and table management.

❖ **STOP – PEST SHIPMENTS**

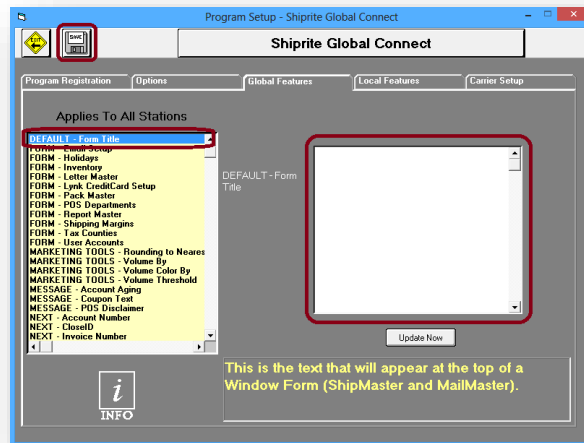
Enabling this option will place an export status of 'hold' on shipments created with Pack Master III. In order for a shipment to upload to its respective carrier, the export status must be 'pending', which may be performed at the 'End of Day' screen or the 'Shipment History' screen.

4. GLOBAL FEATURES



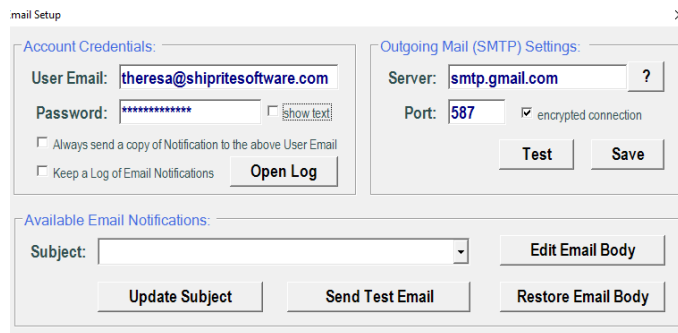
This section covers Global Features, which are the options that affect, not only the server, but also all of the workstations connected to the server. It is important that the changes made in Global Features are made on the server and not on a workstation, as this could create conflicts between the server and each workstation.

- **DEFAULT – FORM TITLE**



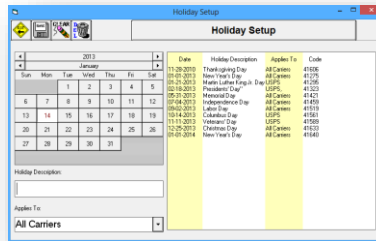
Any text typed into the 'Form Title' text box will be used as a title for the Shipping Master and Mail Master screens. Some examples might be to use the business name, address or phone number. If any changes have been made, click the 'Update Now' button, then click the 'Save' button.

- ❖ **FORM – EMAIL SETUP**



Enter your store email address, password and the path for the outgoing server. You can search for the SMTP settings for your email provider on Google.

❖ FORM – HOLIDAYS



By accessing FORM – Holidays, a new window will open up allowing the user to add, remove, and edit holidays. Holidays affect when a store is considered open, as well as pickup and delivery days for all carriers. ShipRite makes it easy to add local holidays, as well as those observed by only one carrier.

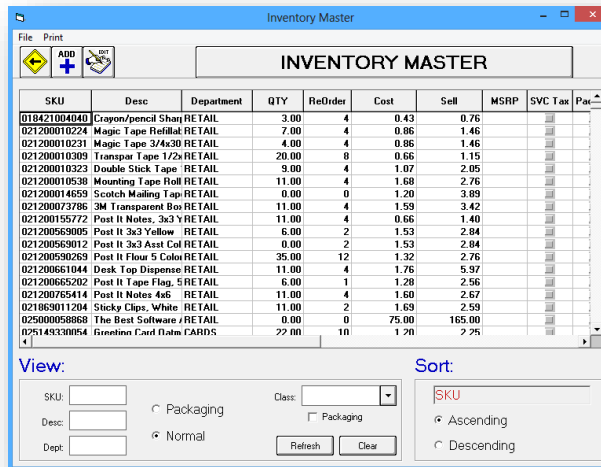
TO ADD A HOLIDAY

- Select the date that the holiday falls on by clicking the 'day' on the calendar.
- Next, enter the holiday description in the corresponding text box.
- Select the carriers affected by the holiday in the 'Applies To' text box.
- Click the 'Save' button to save any changes.

TO DELETE A HOLIDAY

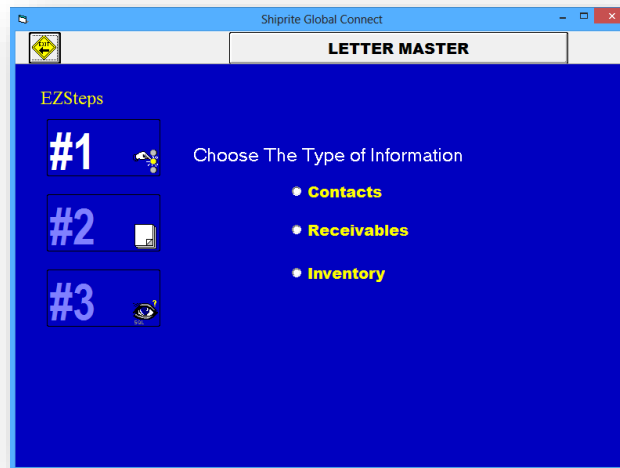
- Click on the holiday to remove in the holiday list window.
- Next, click the 'Delete' button located in the upper left portion of the screen.
- When prompted with "Are you sure?", click the 'Yes' button.
- Click the 'Save' button to save any changes.

❖ FORM – INVENTORY



Selecting this field will open the Inventory Master, which is beyond the scope of this chapter. For more information on the setup of Inventory Master, please see chapter 7.

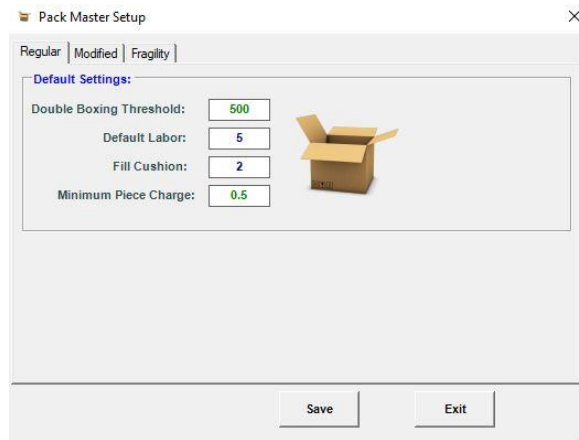
❖ FORM – LETTER MASTER



Selecting this field will open the Letter Master, which is beyond the scope of this chapter. For more information on the setup of Letter Master, please see chapter 6.

❖ FORM – PACK MASTER

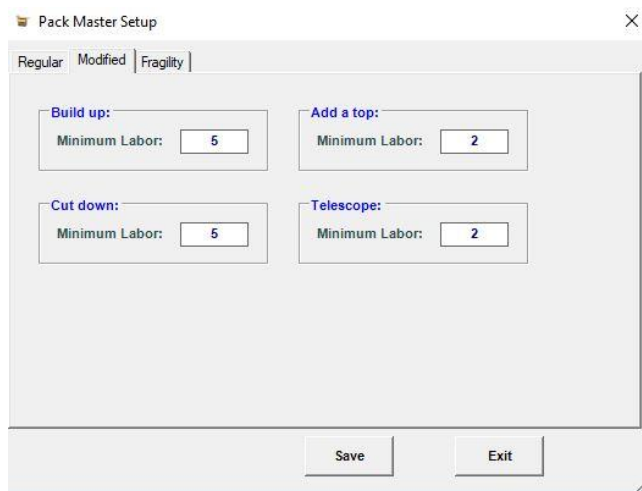
Selecting this field will open the Pack Master Setup screen. There are 3 tabs in the setup.



Regular:

- **Double Boxing Threshold** – The minimum dollar value that Pack Master will use before recommending the package be double-boxed.
- **Default Labor** – The minimum amount of time, in minutes, that packing should take.
- **Fill Cushion** – The minimum amount of packing, in inches, between the item and the side of the box.
- **Default Piece Charge** – The additional dollar value to charge for each item packed in the same box.

Modified:



- **Buildup** – The minimum number of labor minutes to build up a box to make it bigger
- **Add a Top** – The minimum number of labor minutes to add a top to the box to make it taller
- **Cut down** – The minimum number of labor minutes to cut down a box to make it shorter
- **Telescope** – the minimum number of labor minutes to telescope 2 boxes together to make it bigger

Fragility:

Pack Master Setup

Regular | Modified | Fragility

Fragility:

	NOT	FRAGILE		EXTREMELY	
Fill Cushion (inch):	<input type="text"/>	.05	1	2	3
Fill SKU:	<input type="text"/>	PACK_LF	PACK_LF	PACK_LF	PACK_LF
Wrap (times):	<input type="text"/>	1	1	2	3
Wrap SKU:	<input type="text"/>	PACK_FW	BUBWP	BUBWP	BUBWP
Labor (min):	2	5	8	10	20
Labor SKU:	PACK_LAB	PACK_LAB	PACK_LAB	PACK_LAB	PACK_LAB

Save Exit

- **Fill Cushion** – The minimum amount of fill (per sq inch) based on the fragility level.
- **Wrap** – the minimum amount of bubble wrap needed based on the fragility level
- **Labor** – The minimum time (in minutes) it takes to pack the item based on the fragility level.

❖ FORM – POS DEPARTMENTS

Shiprite Global Connect

Inventory Departments

Department	Global Mark-Up	Taxable
AIRBORNE	0%	No
CARDS	0%	Yes
COMPUTERS	0%	Yes
COPIES	0%	Yes
FEDEX	0%	Yes
FEDEX	0%	No
INTL AIR	0%	No
MAILBOX	0%	Yes
METER	0%	No
METER INTL	0%	No
MISC NON TAX	0%	No
OFFICE	0%	Yes
PACK	0%	Yes
PAK_SPL	0%	Yes

Department: AIRBORNE

Taxable: On/Off

Selecting this field will open the Inventory Departments screen which allows the user to create point-of-sale categories and set whether the department is taxable.

TO ADD A DEPARTMENT

- Type the name of the department in the corresponding text box.
- Set whether the department is taxable by clicking the radio button or 'On/Off' button.
- Click the 'Save' button to save the department.

TO DELETE A DEPARTMENT

- Locate the department and click on it to select it for removal.
- Click the 'Delete' button to remove the selected department.
- When the message prompt 'Do you really want to remove this record?' opens, click the 'Yes' button.

❖ FORM – SHIPPING MARGINS

	FROM	TO
Level 1	0.00	9.99
Level 2	10.00	19.99
Level 3	20.00	999999.00

Update Now

A 3 Tiered pricing markup scheme based on 3 ranges of calculated shipping charges.

Selecting this field will allow the user to edit the markup value range (\$) for each tier level.

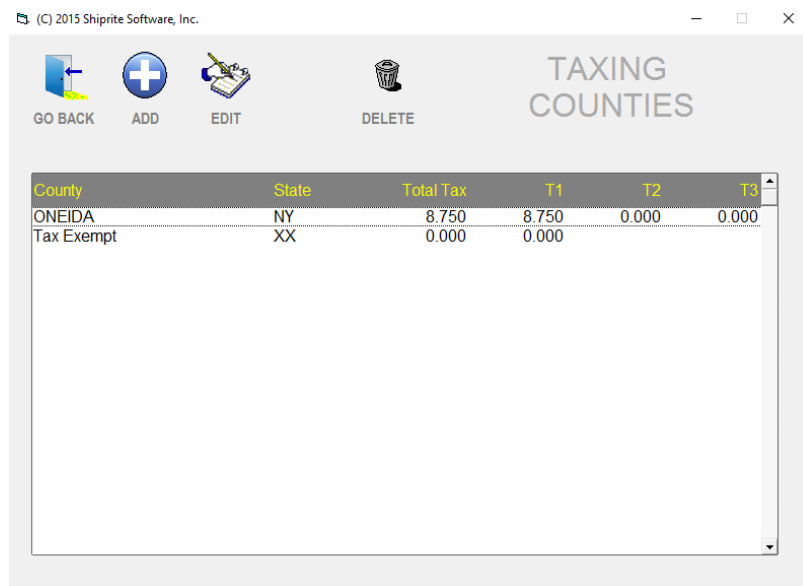
TO CHANGE THE MARKUP VALUES

- Click in the text field of the tier level to change.
- Enter the dollar amount.
- Click the 'Update Now' button and then the 'Save' button.

(Note: If a shipping cost is not covered by a tier, the Shipping Master will produce an error and no markup will be calculated)

(Note: If two tier levels overlap, then the Shipping Master will calculate the markup using the lower of the two tiers levels, which will also not produce an error)

❖ FORM – TAX COUNTIES



County	State	Total Tax	T1	T2	T3
ONEIDA	NY	8.750	8.750	0.000	0.000
Tax Exempt	XX	0.000	0.000		

Selecting this field will open the Tax Counties form, which is used for setting the tax rate per county and state.

TO APPLY A TAX RATE

- Enter the business' state in the corresponding text box.
- Enter the business' county in the corresponding text box.
- Enter the tax rate to be applied in the corresponding text box.
- Click the 'Save' button.

TO REMOVE A TAX RATE

- Click on the tax to select it for removal.
- Click the 'Delete' button.
- When the message prompt 'ATTENTION...Are you sure?' opens, click the 'Yes' button.

❖ FORM – USER ACCOUNTS

The screenshot shows a web application window titled "Shiprite Global Connect" with a "USER SETUP" form. The form has a toolbar with icons for "EDIT", "SAVE", "CLEAR", and "DELETE". The main form area is blue and contains the following fields: "UserID:" (a dropdown menu), "Password:" (a text box), "FullName:" (a text box), and "Phone:" (a text box with dashes). Below these fields are two columns of permissions: "OFF" and "ON". The "OFF" column lists various system functions: Shipping, View Shipping Costs, Suspend Shipping, Name/Address Table, All Other Tables, Pickup Records, Inc & Production Rpts, Tracking Files, Utilities Menu, General Setup, and User Accounts. The "ON" column is currently empty. There are ">>" and "<<" buttons between the columns. A red box highlights the UserID, Password, FullName, and Phone fields.

Selecting this field will allow the user to create and edit accounts and set permissions. The default account is set to ADMIN, with full access to all aspects of ShipRite.

(Note: ShipRite will not function properly without an ADMIN account.)

TO ADD A NEW USER ACCOUNT

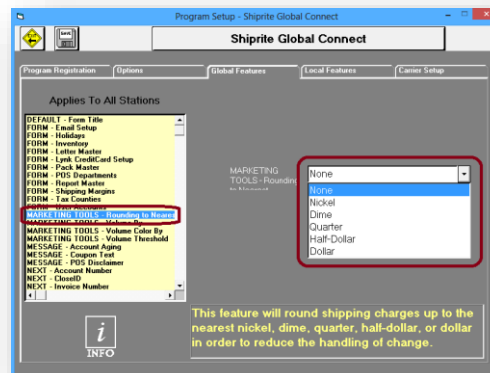
- Enter a user ID in the corresponding text box.
- Enter a numerical password in the corresponding text box.
- Enter the user's full name in the corresponding text box.
- Enter the user's phone number in the corresponding text box.
- Select the permissions that the user will be granted.

- Click the 'Save' button.

USER PERMISSIONS

- ❖ **Shipping** – Grants the user access to ship packages
- ❖ **View Shipping Costs** – Grants the user access to view package prices
- ❖ **Suspend Shipping** – Grants the user access to suspend a shipment
- ❖ **Name/Address Table** – Grants the user access to name and address tables
- ❖ **All Other Tables** – Grants the user access to Inventory, QuickBooks, Management Module and other tables
- ❖ **Pickup Records** – Grants the user access to view pickup records
- ❖ **Inc & Production Rpts** – Grants the user access to view Inc Production Reports
- ❖ **Tracking Files** – Grants the user access to tracking files
- ❖ **Utilities Menu** – Grants the user access to the utilities menu, located from the 'options' tab
- ❖ **General Setup** – Grants the user access to the 'General Setup' options, located from the main menu
- ❖ **User Accounts** – Grants the user access to creating and modifying user accounts
- ❖ **POS** – Grants the user access to the point-of-sale interface
- ❖ **Online Access** – Grants the user access to online features, such as uploading and updating procedures
- ❖ **Contacts** – Grants the user access to add, remove, and edit contacts
- ❖ **Voiding/Resave** – Grants the user access to cancel, void, or resave a sales transaction
- ❖ **Reports** – Grants the user access to report printing features
- ❖ **POS Manager** – Grants the user access to the POS manager
- ❖ **Discounts** – Grants the user access to discounting functions
- ❖ **POS Button Panel** – Grants the user access to add, delete, and edit buttons

❖ MARKETING TOOLS – ROUNDING TO NEAREST

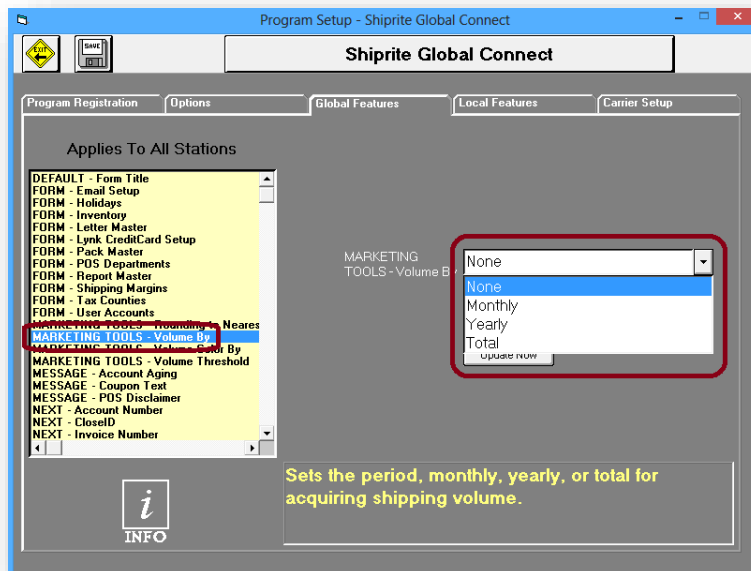


Selecting this field will allow the user to round shipping charges based on the selection made from the drop down menu.

TO CHANGE THE ROUNDING VALUE

- Open the drop down menu by clicking the down arrow on the right side of the text box.
- Click on the selection that ShipRite will round to.
- Click the *'Update Now'* button and then click the *'Save'* button to complete the process.

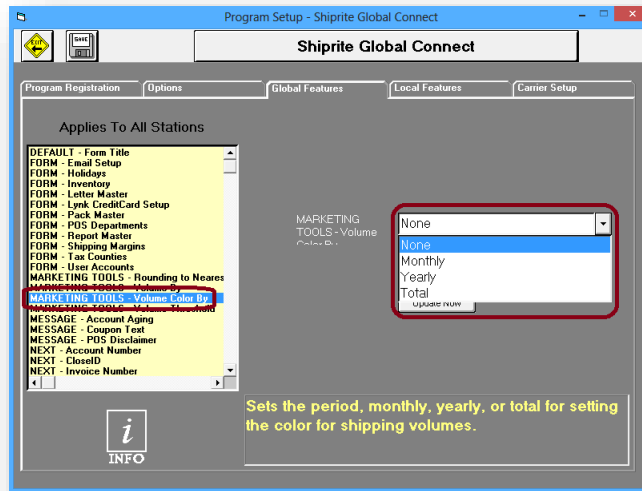
MARKETING TOOLS – Volume By



Selecting this field will allow the user to set the time period that ShipRite will use for calculating revenue totals and acquiring shipping volume.

TO CHANGE THE VOLUME BY VALUE

- Open the drop down menu by clicking the down arrow on the right side of the text box.
- Click on the selection that ShipRite will use for the time period.
- Click the *'Update Now'* button and then click the *'Save'* button to complete the process.



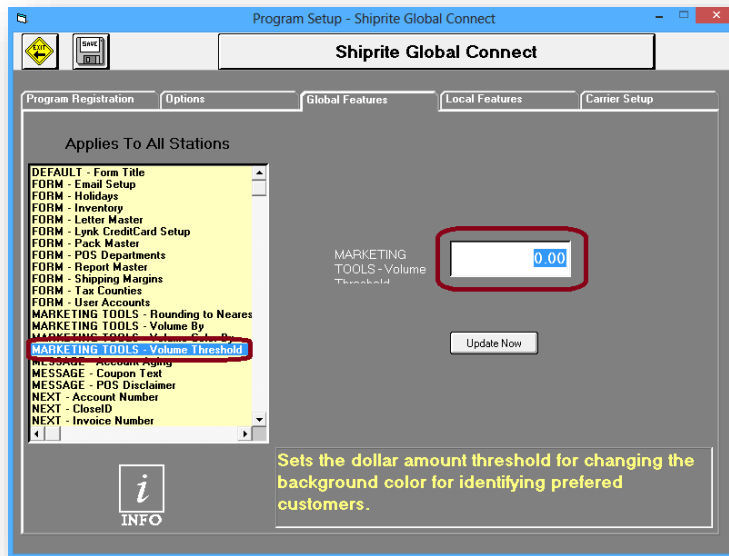
❖ MARKETING TOOLS – VOLUME COLOR BY

Selecting this field will allow the user to set the period of time that a customer will remain in the high shipping volume threshold without making new purchases.

TO CHANGE THE VOLUME COLOR BY VALUE

- Open the drop down menu by clicking the down arrow on the right side of the text box.
- Click on the selection that ShipRite will use for the time period.
- Click the 'Update Now' button and then click the 'Save' button to complete the process.

❖ MARKETING TOOLS – VOLUME THRESHOLD

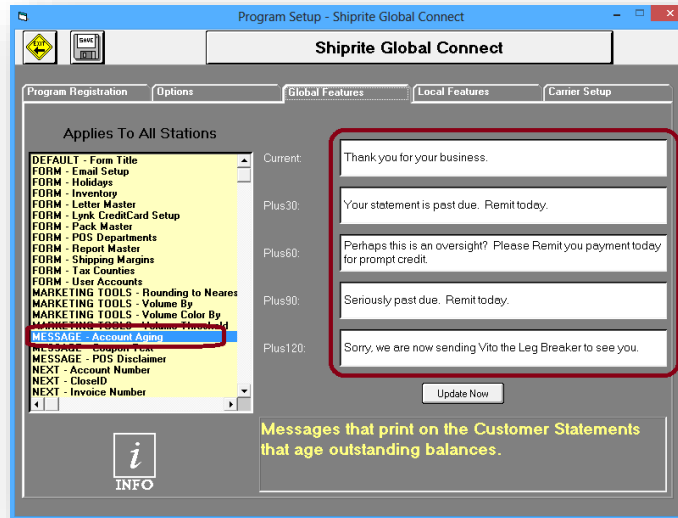


Selecting this field will allow the user to set the dollar value that a customer must reach in order for their name to appear highlighted, signifying an important customer.

TO CHANGE THE VOLUME THRESHOLD

- Click in the text box and enter the dollar amount to set the threshold.
- Click the 'Update Now' button and then click the 'Save' button to complete the process.

❖ MESSAGE – ACCOUNT AGING

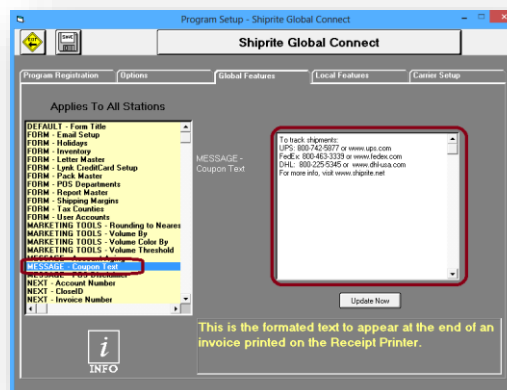


Selecting this field will allow the user to edit messages that appear when printing statements for accounts receivable. These messages print based on the amount of time that has passed since the last payment.

TO CHANGE THE MESSAGE

- Click in the text box and enter the message you would like printed for the corresponding time lapse
- Click the 'Update Now' button and then click the 'Save' button to complete the process

❖ MESSAGE – COUPON TEXT

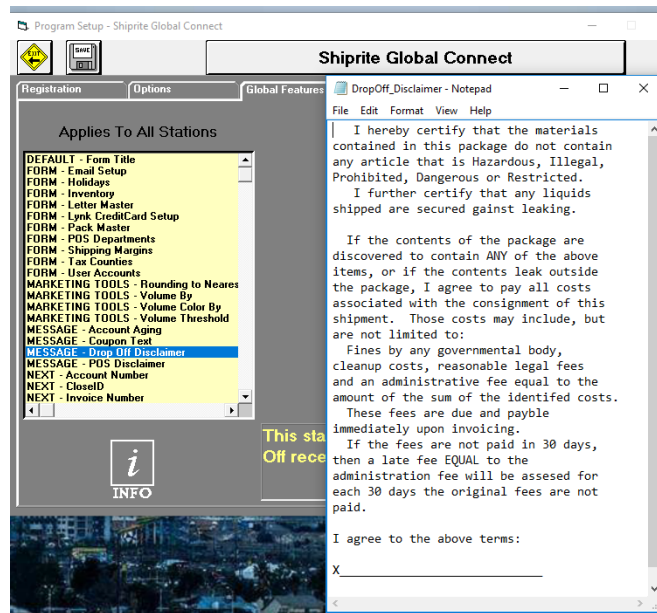


Selecting this field will allow the user to add and edit text that will appear at the bottom of receipts printed with the receipt printer.

TO CHANGE THE MESSAGE

- Click in the text box and enter the message you would like printed at the bottom of the receipt.
- Click the *'Update Now'* button and then click the *'Save'* button to complete the process.

❖ MESSAGE – DROP OFF DISCLAIMER

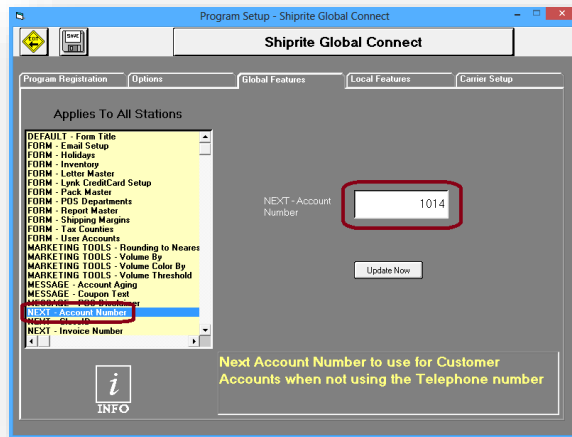


Selecting this field will allow the user to add and edit text that will appear at the bottom of receipts when a customer drops off a package, charged on their own account, to be picked up by the carrier.

TO CHANGE THE MESSAGE

- Click in the text box and enter the message you would like printed at the bottom of the receipt.
- Click the *'Update Now'* button and then click the *'Save'* button to complete the process.

❖ MESSAGE – POS DISCLAIMER



Selecting this field will allow the user to add and edit text that will appear at the bottom of receipts when shipping a package through Shipping Master or Mail Master.

TO CHANGE THE MESSAGE

- Click in the text box and enter the message you would like printed at the bottom of the receipt.
- Click the 'Update Now' button and then click the 'Save' button to complete the process.

❖ NEXT – ACCOUNT NUMBER

Selecting this field will allow the user to view the next account number to be associated with a customer, who does not leave a phone number, when an account is created. If a customer leaves a phone number, it will be used as the account number.

(Note: Do not change the account number unless instructed to by a ShipRite support technician)

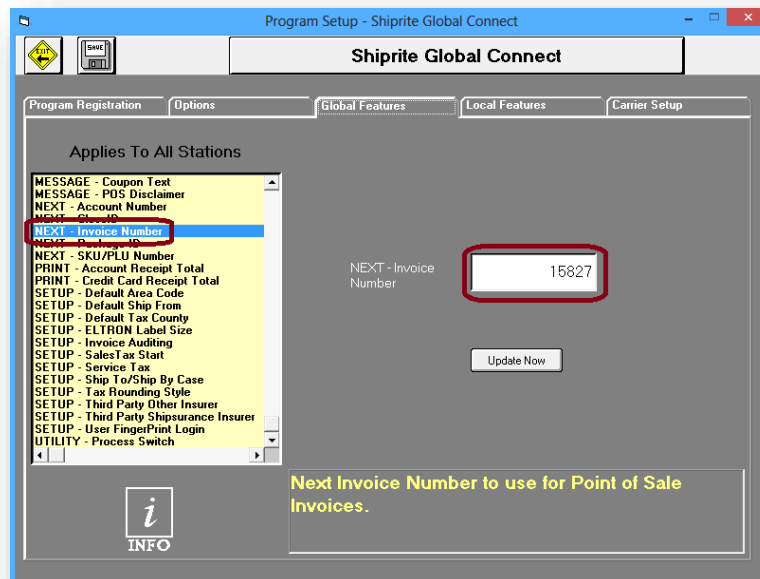
❖ NEXT – CLOSE ID



Selecting this field will allow the user to view the next close ID that is assigned to the day's closing report. This number is used to generate Consolidated Z reports.

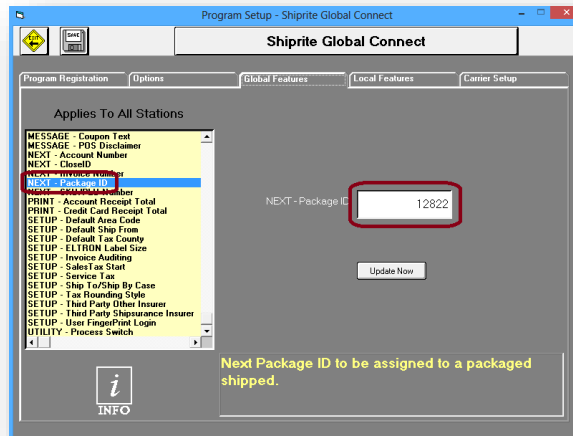
(Note: Do not change the CloseID number unless instructed to by a ShipRite support technician)

❖ NEXT – INVOICE NUMBER



Selecting this field will allow the user to view the next invoice number that will be associated with the next point-of-sale transaction.

(Note: Do not change the invoice number unless instructed to by a ShipRite support technician)

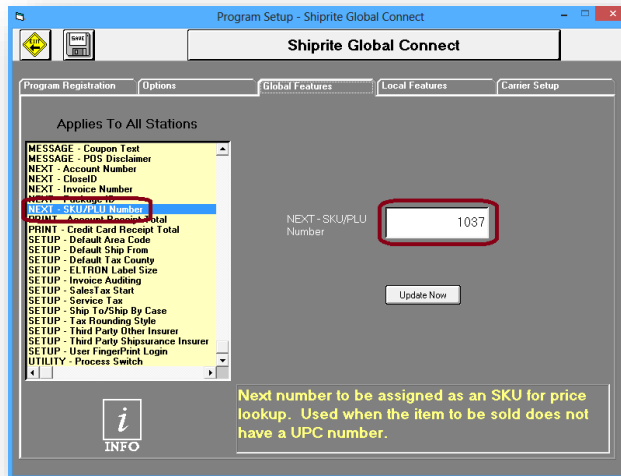


❖ NEXT – PACKAGE ID

Selecting this field will allow the user to view the next package ID number that will be associated with the next package shipped.

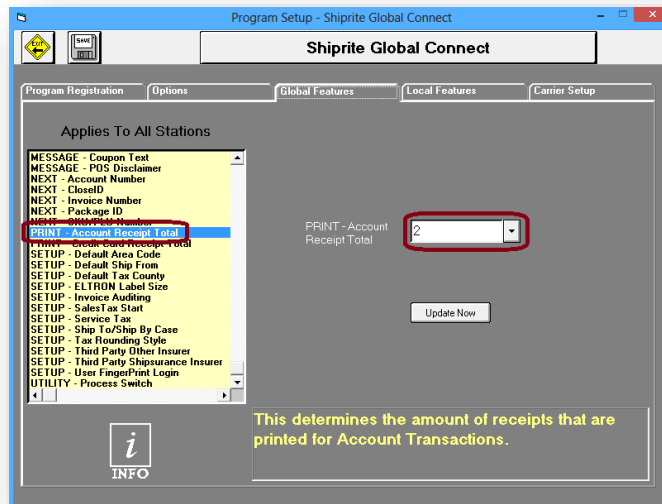
(Note: Do not change the package ID number unless instructed to by a ShipRite support technician)

❖ NEXT – SKU/PLU NUMBER



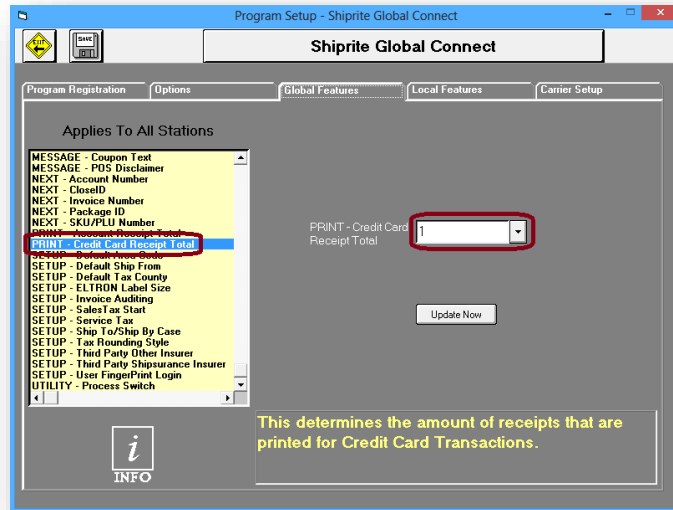
Selecting this field will allow the user to view the next SKU/PLU number that will be associated with the next item entered into the Inventory Master.

❖ **PRINT – ACCOUNT RECEIPT TOTAL**



Selecting this field will allow the user to choose the amount of receipts printed for a sales transaction.

❖ PRINT – CREDIT CARD RECEIPT TOTAL



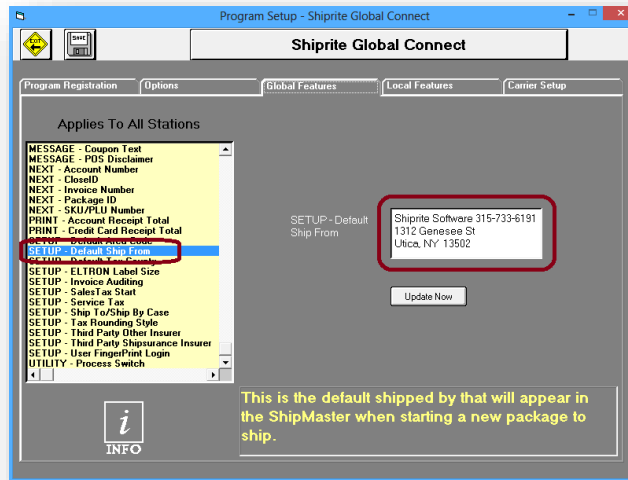
Selecting this field will allow the user to choose the amount of receipts printed for a credit card transaction.

❖ SETUP – DEFAULT AREA CODE



Selecting this field will allow the user to enter a default area code that will be used when the phone number for a customer is entered.

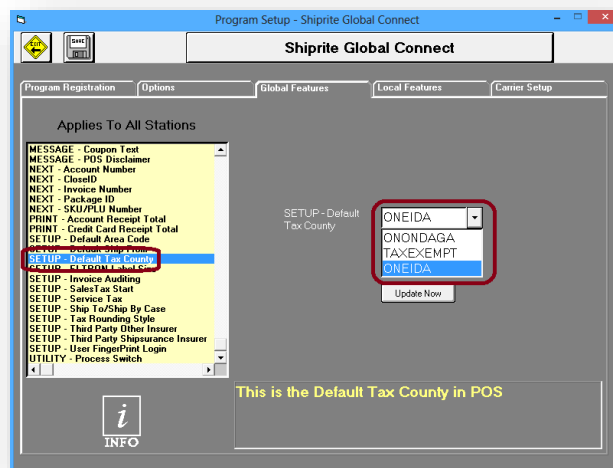
❖ SETUP – DEFAULT SHIP FROM



Selecting this field will allow the user to edit the default 'Ship From' address. This address will be used in the 'From' field when processing a shipment in the Shipping Master. Your Default Ship From should be the name and address of your store.

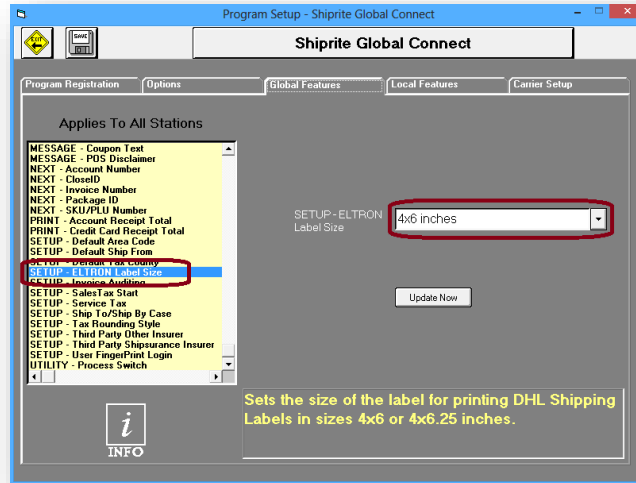
(Note: Always be sure to have a default ship-from address, otherwise, ShipRite may encounter errors)

❖ SETUP – DEFAULT TAX COUNTY



Selecting this field will allow the user to choose the default tax county to be used for calculating the tax on transactions. Click the arrow on the drop down textbox to show all counties entered currently entered into ShipRite.

❖ SETUP – ELTRON LABEL SIZE

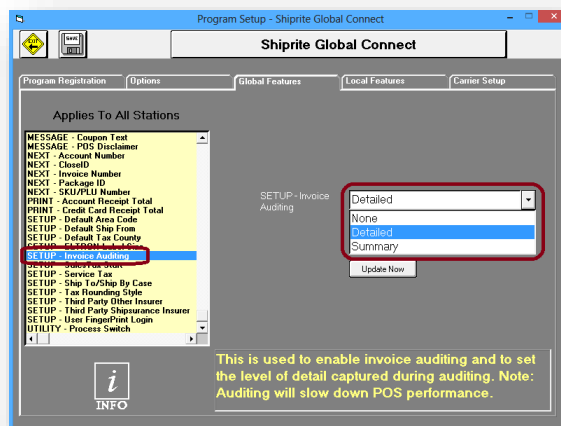


Selecting this field will allow the user to set the print size of DHL shipment labels.

OPTIONS

- 4x6 inches
- 4x6.25 inches

❖ SETUP – INVOICE AUDITING



Selecting this field will allow the user to choose which type of invoice auditing to use. The drop down textbox will provide the option to choose a detailed report or a summary report.

OPTIONS

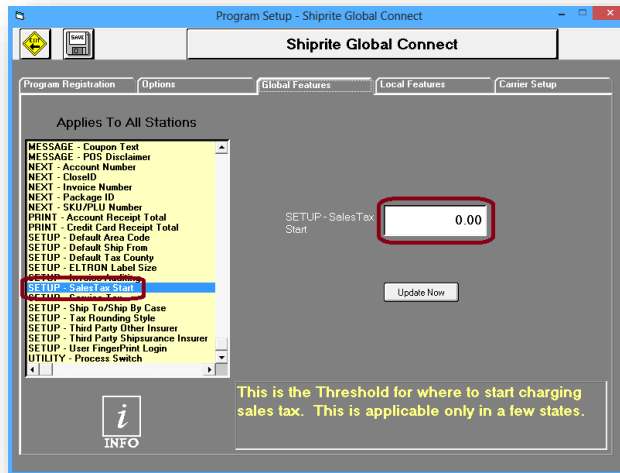
- None
- Detailed
- Summary

❖ PRINTED SHIPPING RECEIPT

Available Printed Receipt On/Off Options:		OFF	ON
Consignee Name	<input type="radio"/>	<input checked="" type="radio"/>	
Consignee Street Address	<input checked="" type="radio"/>	<input type="radio"/>	
Consignee City/State/Zip	<input checked="" type="radio"/>	<input type="radio"/>	
Dimensions L x W x H	<input type="radio"/>	<input checked="" type="radio"/>	
Scale WT / Charge WT	<input type="radio"/>	<input checked="" type="radio"/>	

Select this option allows the user to choose what information they want printed on the customer package shipping receipt

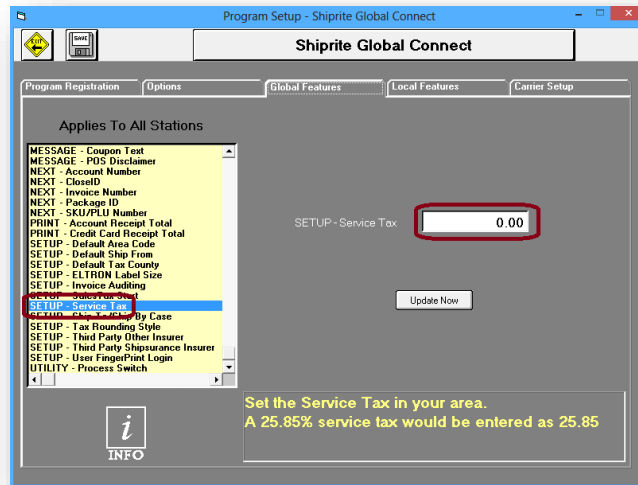
❖ SETUP – SALES TAX START



Selecting this field will allow the user to set the minimum dollar amount needed in a sale before ShipRite will start calculating a sales tax.

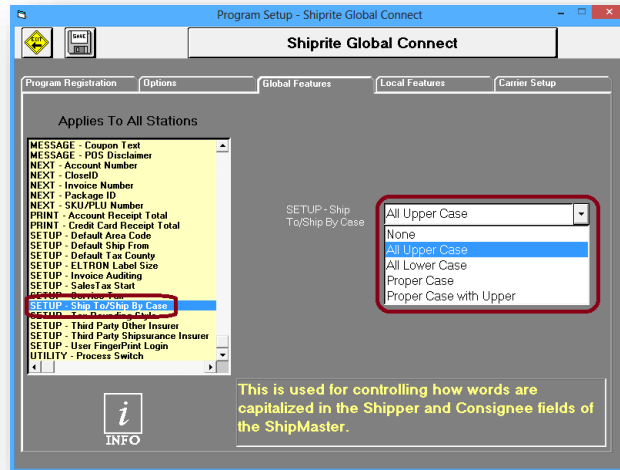
(Note: This option is only applicable in certain states)

❖ SETUP – SERVICE TAX



Selecting this field will allow the user to set the service tax in their area. This value is represented as a percentage. This is only applicable in certain states.

❖ SETUP – SHIP TO/SHIP BY CASE

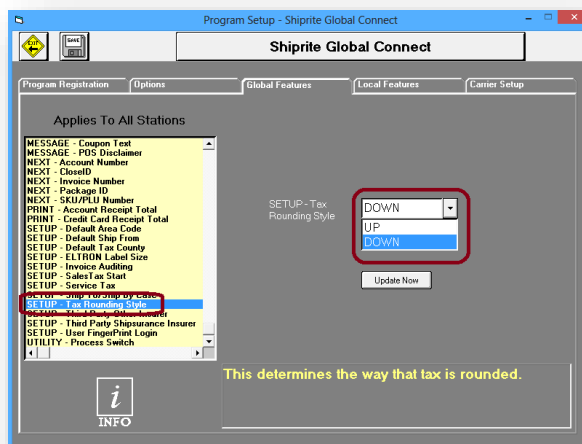


Selecting this field will allow the user to choose the way in which the consignee field is displayed.

OPTIONS

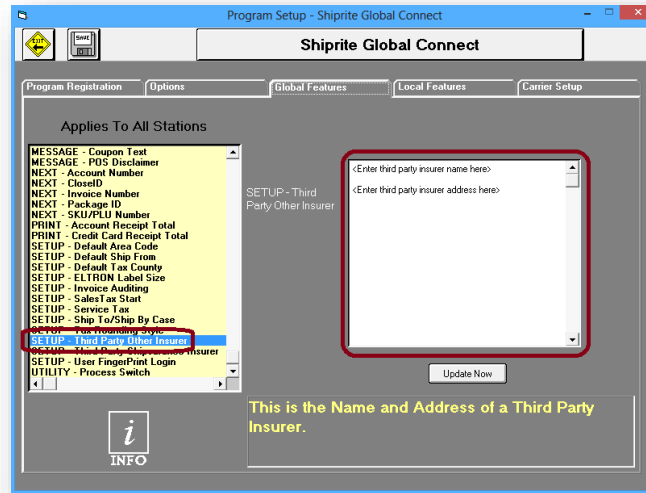
- All upper case
- All lower case
- Proper case
- Proper case with upper

❖ SETUP – TAX ROUNDING STYLE



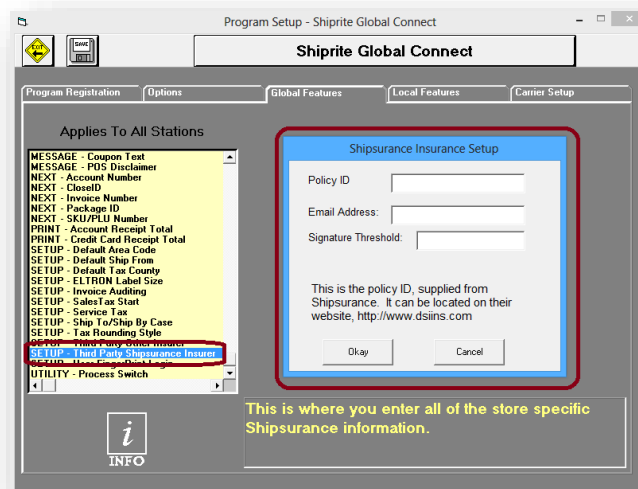
Selecting this field will allow the user to set the tax rounding method. The method chosen depends on the state in which one lives in. Please select the rounding style that meets state requirements.

❖ SETUP – THIRD PARTY OTHER INSURER



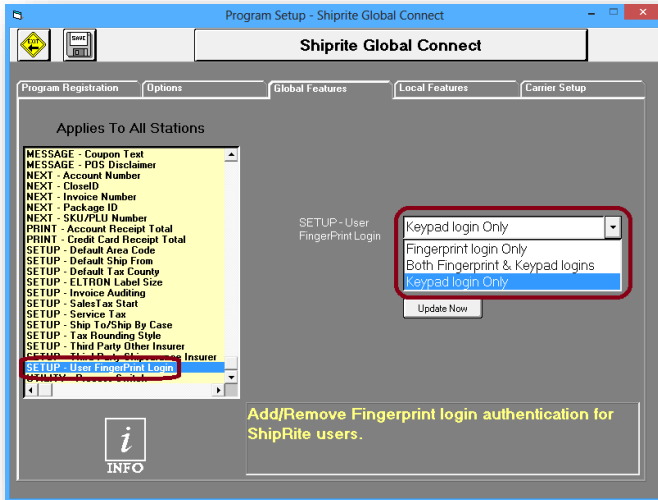
Selecting this field will allow the user to enter the third-party-insurers' name and address. This information will be printed on the report that will be issued to the third-party-insurer.

❖ SETUP – THIRD PARTY SHIPSURANCE INSURER



Selecting this field will allow the user to enter the Shipsurance account information. The policy ID, supplied by Shipsurance, can be located on their website, <http://www.dsiins.com>.

❖ SETUP – USER FINGER PRINT LOGIN



Selecting this field will allow the user to choose the method used for login authentication.

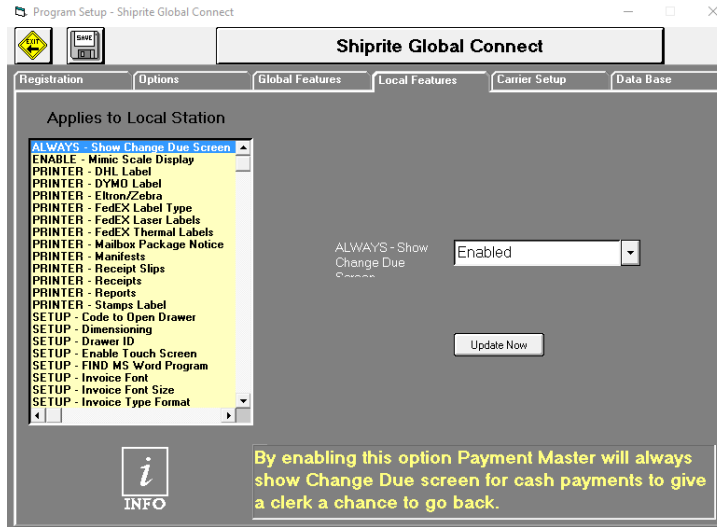
OPTIONS

- Fingerprint login
- Keypad login
- Fingerprint & Keypad login

5. LOCAL FEATURES

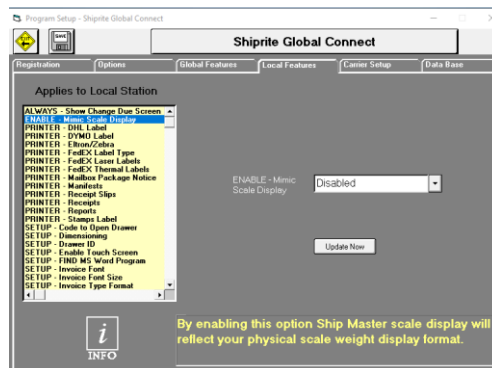
This section covers local features, which represent the options that are applied to each individual workstation operating ShipRite. Each workstation on the network will need to have these options set correctly.

- **ALWAYS – SHOW CHANGE DUE SCREEN**



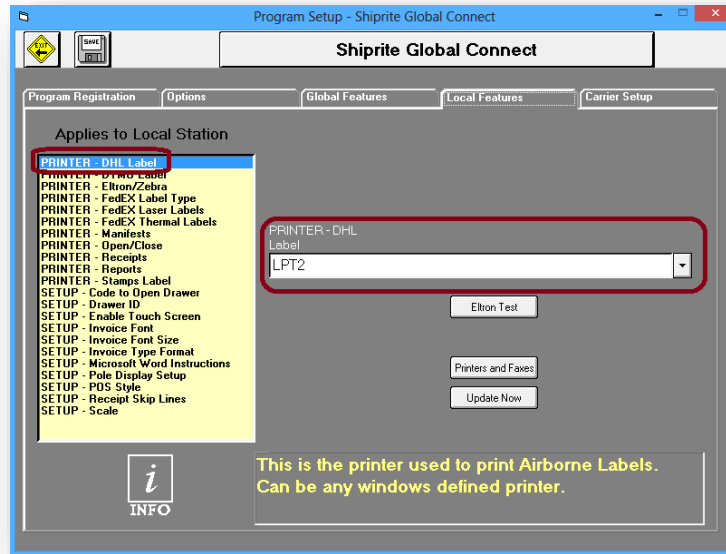
This option allows the user to choose whether or not to show the amount of change due after a transaction

- **MIMIC SCALE DISPLAY**



By enabling this option, ShipMaster sale display will reflect your physical scale weight display format

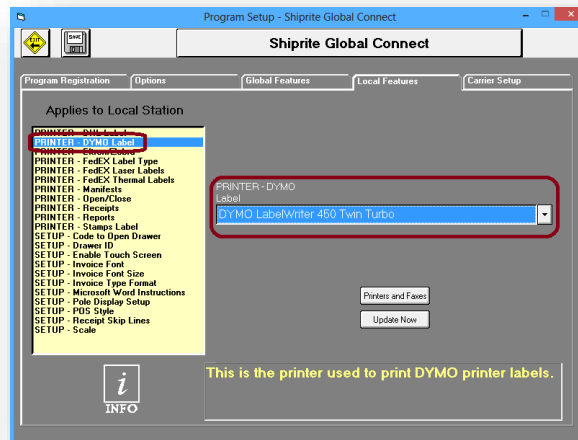
- **PRINTER – DHL LABEL**



Selecting this field will allow the user to select the printer that will print DHL labels.

- Click the drop down arrow to open the list of available printers.
- Click on the printer to be used for printing DHL labels.
- Click the 'Update Now' button, then click the 'Save' button.

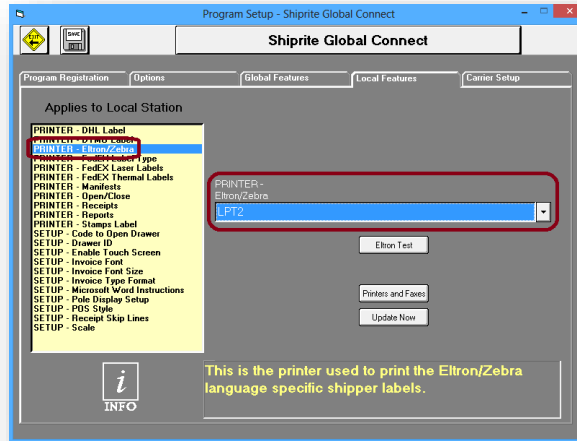
- **PRINTER – DYMO LABEL**



Selecting this field will allow the user to select the printer that will print Dymo labels.

- Click the drop down arrow to open the list of available printers.
- Click on the printer to be used for printing Dymo labels.
- Click the *'Update Now'* button, then click the *'Save'* button.

• **PRINTER – ELTRON/ZEBRA**



Selecting this field will allow the user to select the printer that will print Eltron/Zebra labels, used for UPS shipments.

- Click the drop down arrow to open the list of available printers.
- Click on the printer to be used for printing Eltron/Zebra labels.
- Click the *'Update Now'* button, then click the *'Save'* button.

• **PRINTER – FEDEX LABEL TYPE**

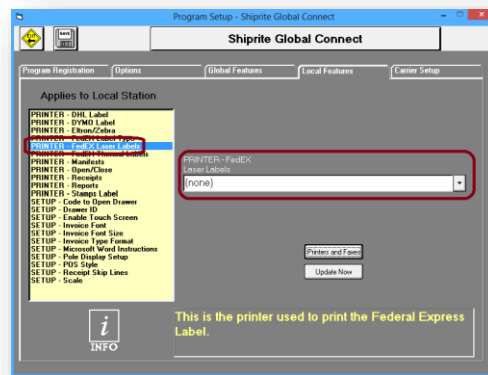


Selecting this field will allow the user to select the FedEx label type. If using a thermal label printer, select 'Thermal No doc tab', else if using a laser printer, select 'Laser'.

OPTIONS

- Thermal no doc tab
- Thermal doc tab bottom
- Thermal doc tab top
- Laser

• PRINTER – FEDEX LASER LABELS

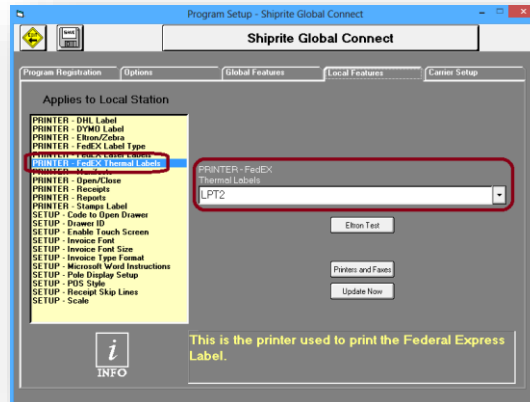


Selecting this field will allow the user to select the laser printer to be used for printing FedEx labels.

(Note: Choosing the laser printer is only necessary if the label type has been set to 'Laser')

- Click the drop down arrow to open the list of available printers.
- Click on the printer to be used for printing FedEx labels.
- Click the 'Update Now' button, then click the 'Save' button.

- **PRINTER – FEDEX THERMAL LABELS**

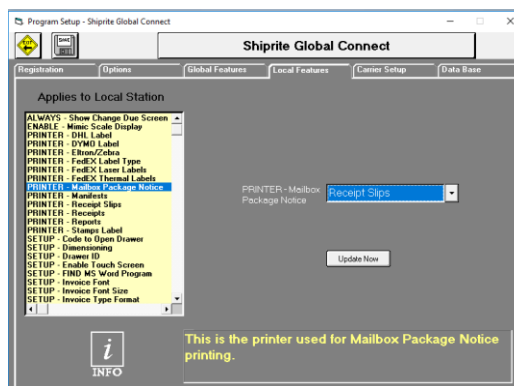


Selecting this field will allow the user to select the LPT port to be used for printing FedEx labels with a thermal printer.

(Note: Choosing the LPT port is only necessary if the label type has not been set to 'Laser')

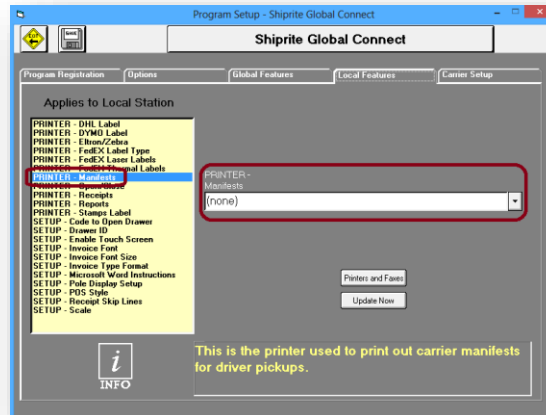
- Click the drop down arrow to open the list of available ports.
- Click on the LPT port to be used for printing FedEx labels.
- Click the 'Update Now' button, then click the 'Save' button.

- **MAILBOX PACKAGE NOTICE**



Select the printer used for Mailbox Package Notice printing

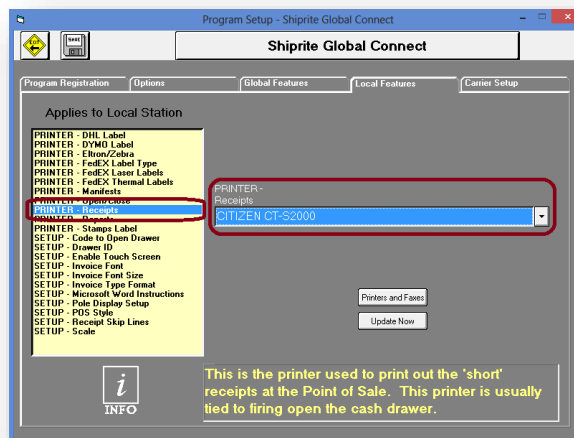
- **PRINTER – MANIFESTS**



Selecting this field will allow the user to select the printer to be used for printing manifests.

- Click the drop down arrow to open the list of available printers.
- Click on the printer to be used for printing manifests.
- Click the *'Update Now'* button, then click the *'Save'* button.

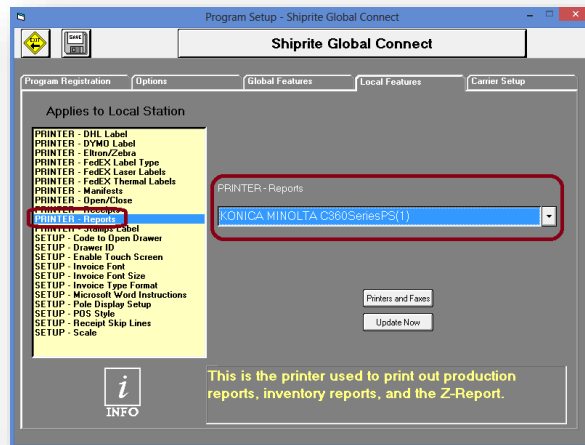
- **PRINTER – RECEIPTS**



Selecting this field will allow the user to select the printer to be used for printing receipts.

- Click the drop down arrow to open the list of available printers.
- Click on the printer to be used for printing receipts.
- Click the *'Update Now'* button, then click the *'Save'* button.

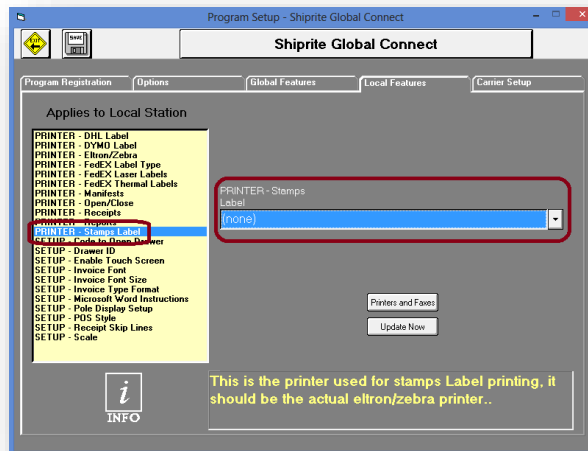
- **PRINTER – REPORTS**



Selecting this field will allow the user to select the printer to be used for printing reports.

- Click the drop down arrow to open the list of available printers.
- Click on the printer to be used for printing reports.
- Click the 'Update Now' button, then click the 'Save' button.

- **PRINTER – STAMPS LABEL**



Selecting this field will allow the user to select the printer to be used for printing Stamps.com labels.

- Click the drop down arrow to open the list of available printers.
- Click on the printer to be used for printing Stamps.com labels.

- Click the 'Update Now' button, then click the 'Save' button.

- **SETUP – CODE TO OPEN DRAWER**



This is the ASCII code value used by ShipRite to open the cash drawer.

- **DIMENSIONING**

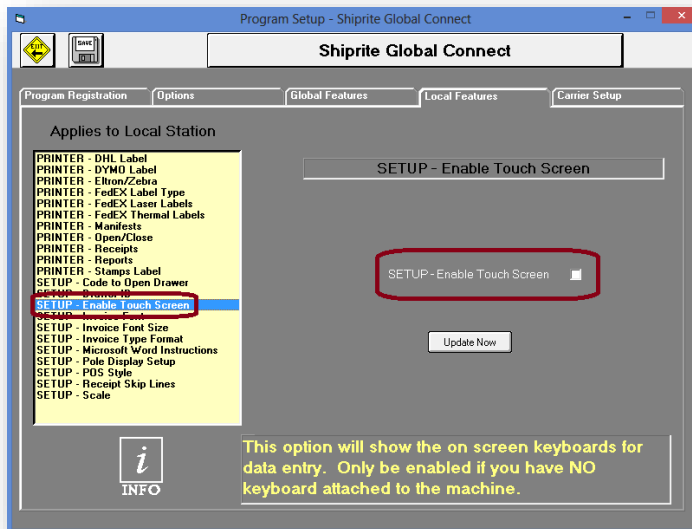


- **SETUP – DRAWER ID**



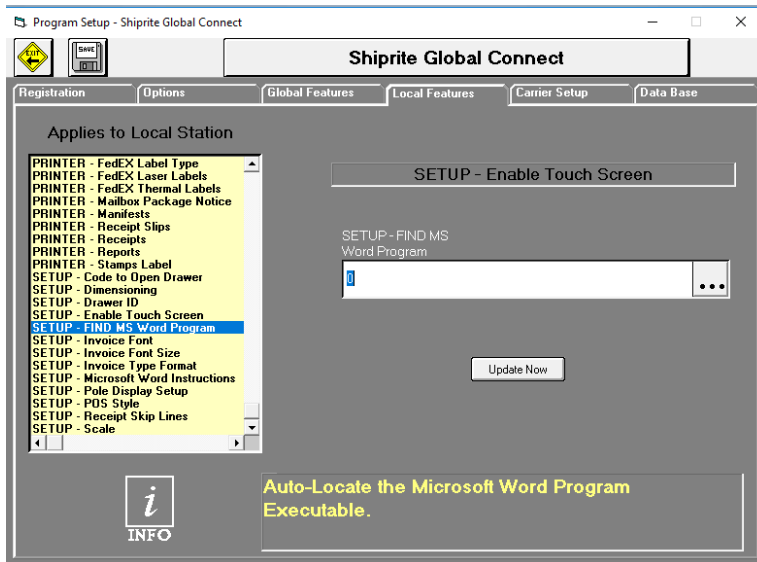
This is the location specific Drawer ID used to identify where transactions occurred and where money was received.

-
- **SETUP – ENABLE TOUCH SCREEN**



This feature will allow you to enable touch screen support.

- **SETUP – FIND MS WORD PROGRAM**



Auto locate the Microsoft word program executable file Winword.exe

- **SETUP – INVOICE FONT**



This feature will allow you to set the font type for the invoice.

- **SETUP – INVOICE FONT SIZE**



This feature will allow you to set the font size for the invoice.

- **SETUP – INVOICE TYPE FORMAT**

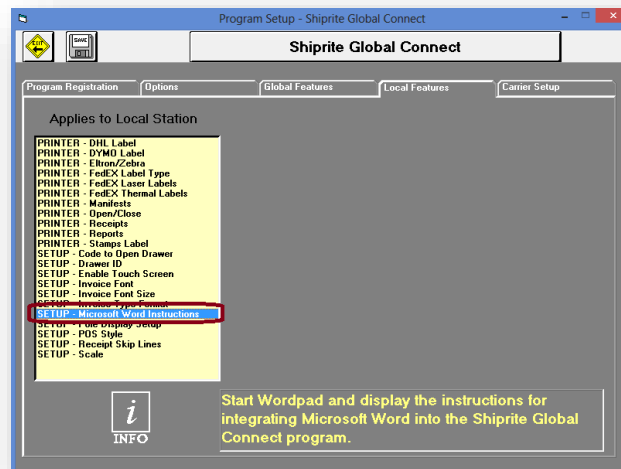


This feature will allow you to choose the invoice type format.

Options include:

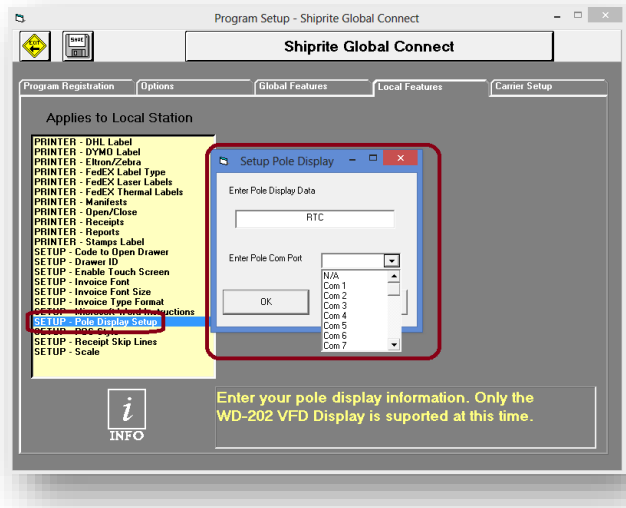
- **Short** – used for the receipt printer
- **Long** – used for the laser printer

- **SETUP – MICROSOFT WORD INSTRUCTIONS**



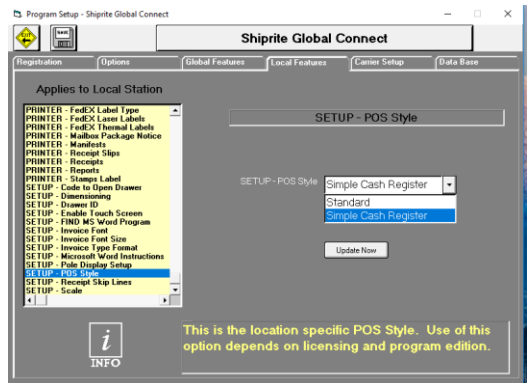
This feature will start Microsoft Word and display the instructions for integrating it with ShipRite.

- **SETUP – POLE DISPLAY SETUP**

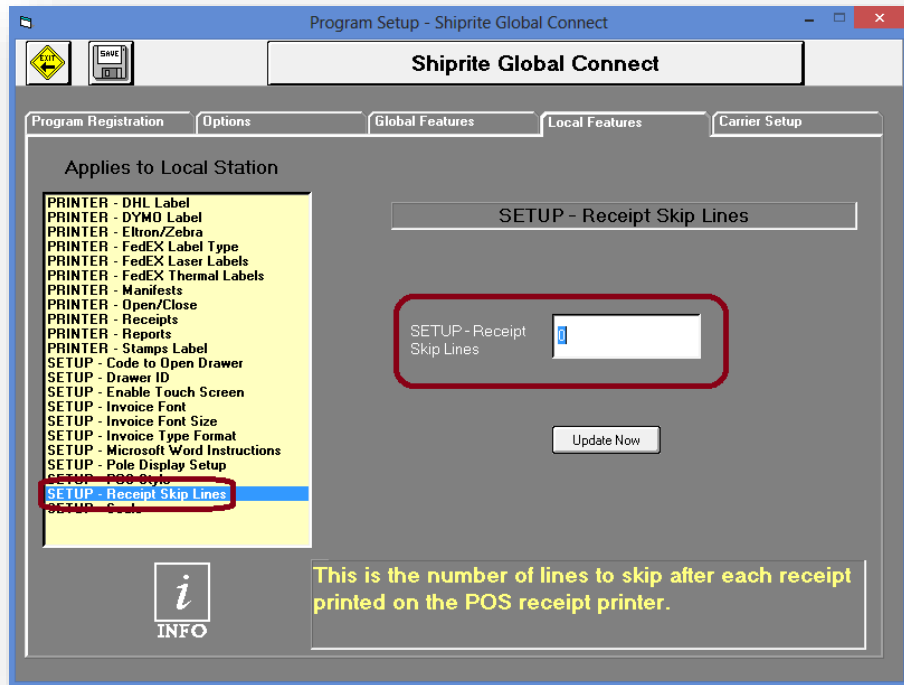


This feature will allow you to setup your customer-facing pole display. The upper text box allows you to enter the display text while the lower text box allows you to select the Com Port that your display is set to.

- **SETUP – POS STYLE**

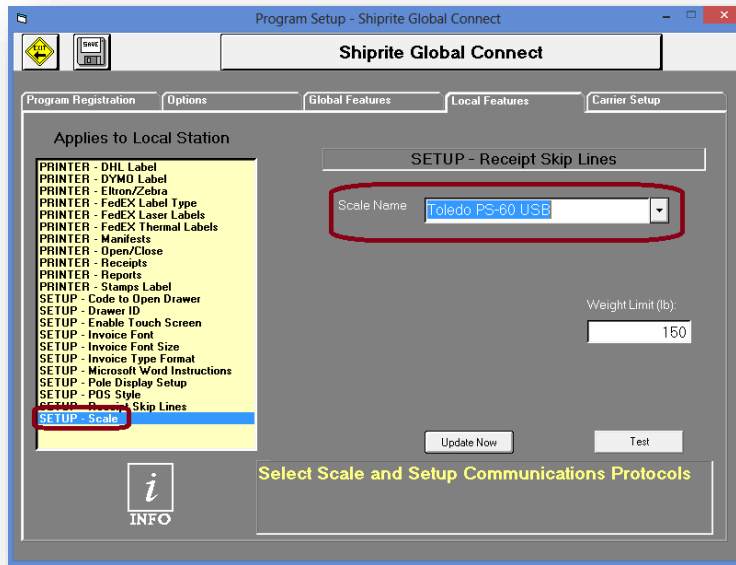


This is a location specific POS style. Use of this option depends on licensing and program edition.
SETUP – Receipt Skip Lines



This feature will allow you to enter a value in the textbox representing the number of lines to skip after each receipt is printed.

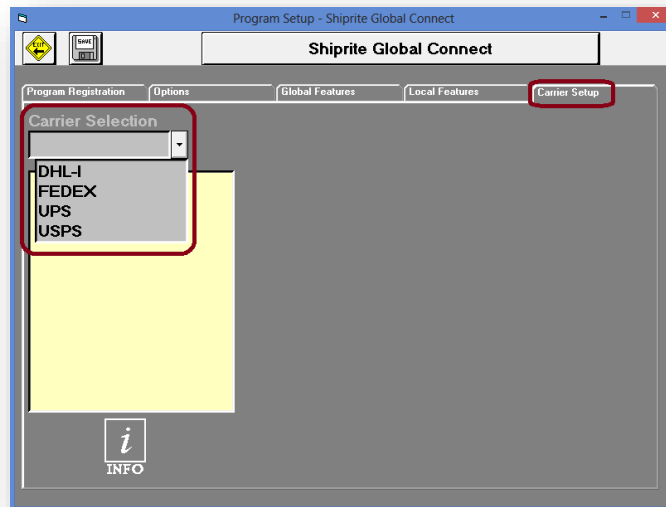
- **SETUP – SCALE**



This feature allows you to setup the scale for use with ShipRite.

- Select the scale from the drop down menu.
- Click the 'Update Now' button, then click the 'Save' button.

6. CARRIER SETUP



This section covers carrier setup for DHL, FedEx, UPS, and USPS. To access the carrier setup:

- From the ShipRite main menu, click the 'Setup' tab, then click 'General Setup Options'.
- Next, click the 'Carrier Setup' tab to the right.
- From the Carrier Selection menu, choose which carrier to setup.

❖ DHL



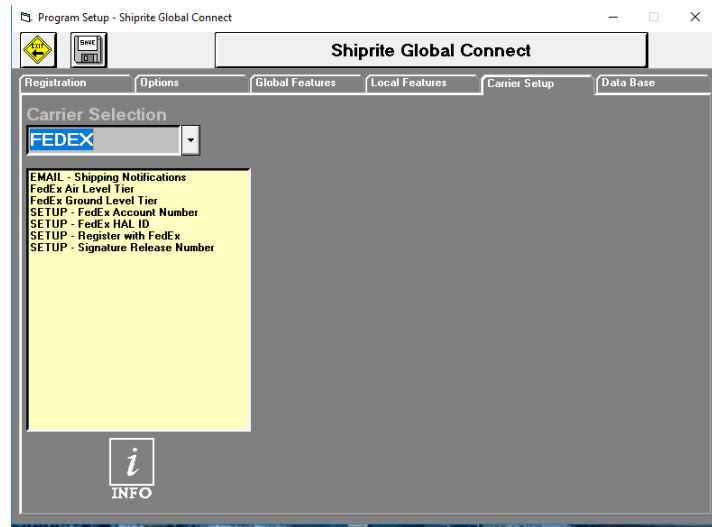
The screenshot shows the 'Carrier Setup' window in the Shiprite Global Connect application. The window title is 'Program Setup - Shiprite Global Connect'. The main title is 'Shiprite Global Connect'. The window has several tabs: 'Program Registration', 'Options', 'Global Features', 'Local Features', and 'Carrier Setup'. The 'Carrier Selection' dropdown menu is set to 'DHL-I'. Below this is a large yellow rectangular area. To the right, there are input fields for 'Site User ID', 'Account Number', and 'DHL-I DASC Rate Type' (set to 'RS2'). An 'UPDATE NOW' button is located at the bottom right of the form area. An 'INFO' icon is visible in the bottom left corner of the window.

You can obtain a DHL account number by sending an email to DASC@DHL.com and they will contact you to get set up.

To setup your DHL account:

- Enter your DHL account number in the corresponding textbox.
- From the drop-down textbox, choose your rate type. DHL will tell you what your rate type is.. Most stores start out with RS3 rates.

❖ FEDEX



Apply to be an FASC by going to www.fascnet.com

EMAIL – Shipping Notifications

Check to disable the email notifications generated by the carrier to a shipper and/or consignee about their shipment

Fedex Air Tier Level – enter the tier level for your Fedex Express account (found on the welcome letter you get from FASC)

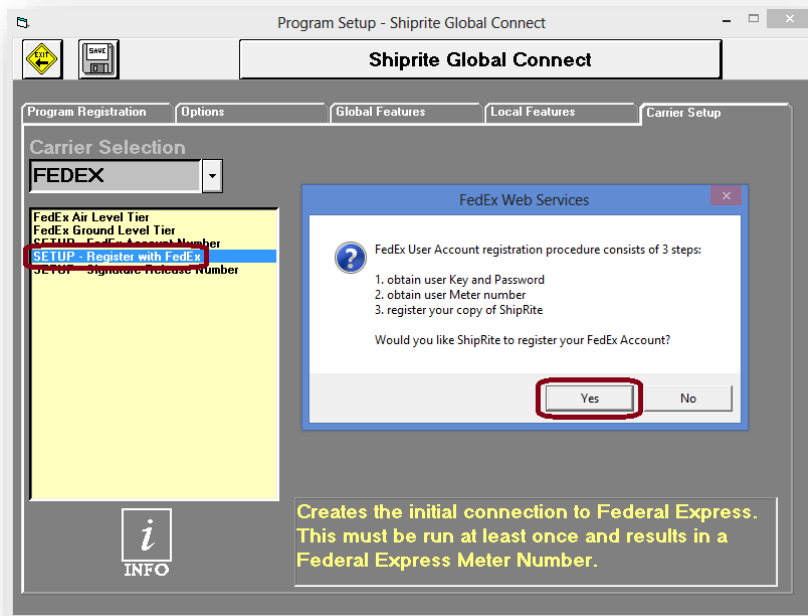
Fedex Ground Tier Level – enter the tier level for your Fedex Ground account (Found on the welcome letter you get from FASC)

Setup - FedEx account number:

- Click on 'SETUP – FedEx Account Number' located in the left column.
- Enter your FedEx account number in the corresponding textbox.

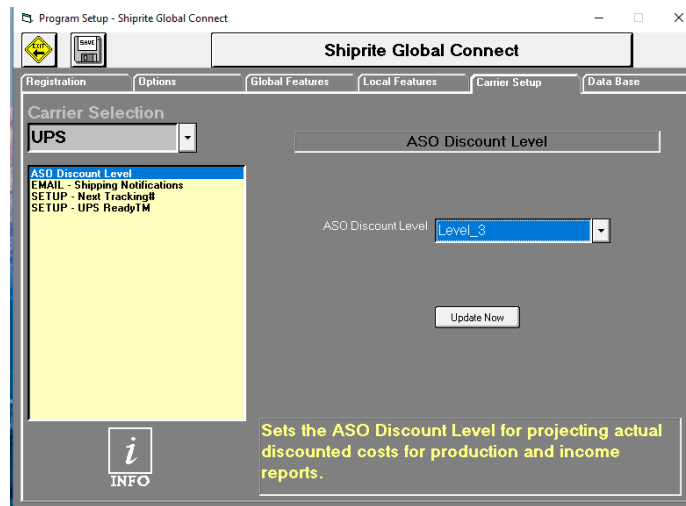
Setup – FedEx HAL ID

Enter Location ID and Agent ID. These are the Fedex Hold at Location ID's provided by your account rep

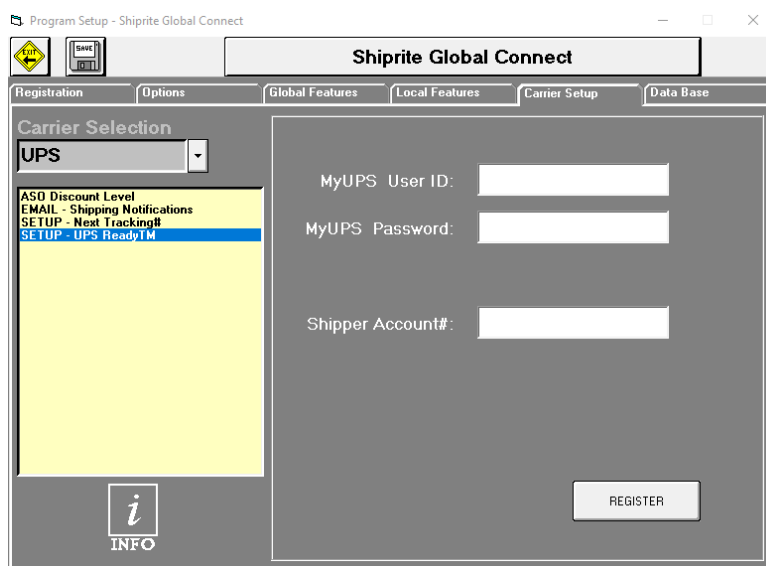


- Click on 'SETUP – Register with FedEx' located in the left column.
- Click the 'Yes' button on the following pop up window to obtain the user key and password, obtain use meter number, and register your copy of ShipRite.

When finished, a message will display to let you know that the FedEx setup process has successfully completed.



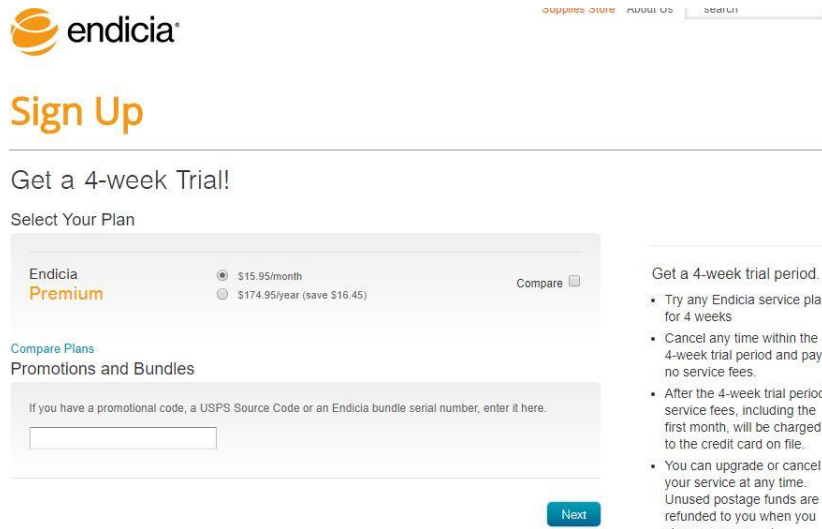
- Select 'ASO Discount Level' from the menu. You will be given a discount level when you are approved to be an ASO. To apply to UPS, send an email to ASOAwards@ups.com
- From the 'ASO Discount Level' drop down menu, select your UPS discount level.
- Click the 'Update Now' button.



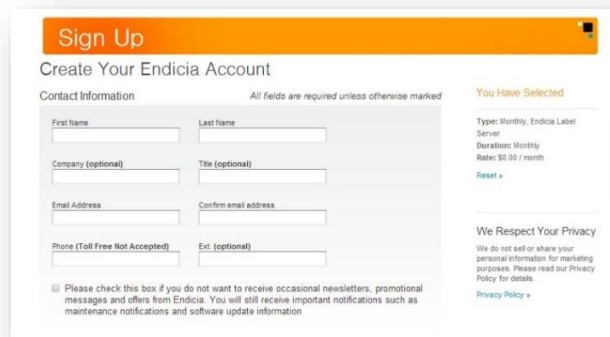
- Select 'SETUP – UPS ReadyTM'.
- Enter your 'MyUPS User ID' in the corresponding textbox.
- Enter your 'MyUPS Password' in the corresponding textbox.
- Enter your 'Shipper Account#' in the corresponding textbox.
- Click the 'Register' button.
- You will need your last invoice from UPS to complete the registration

CREATE AN ENDICIA ACCOUNT:

- Visit the following website: <https://account.endicia.com/shiprite>
- Click the *Next* button to proceed to the next page.



- Fill out the *Contact Information* on the next page.



- Fill out *Your Postal Settings*.

Your Postal Settings

Physical Address

Address1 Address2 (optional)

City State ZIP Code™

My Mailing Address (where my mail is sent to) is the same as my Physical Address (where my mail is sent from)

Post Office
None selected [Auto Select](#)

Fill out the *Password and Security Options*.

Password and Security Options

Endicia.com Internet Password
This password will be used to access your account pages on Endicia.com. For security purposes, your password must be at least 8 characters long and contain 2 numbers, 1 uppercase and 1 lowercase letter.

Password Password Strength ■

Re-Enter Password

Software Settings
Create a temporary pass phrase for accessing your Endicia software. The pass phrase must be 5-64 characters long and cannot be the same as the Endicia.com Internet password you created above, which is used to access your online account pages.

Temporary Software Pass Phrase (One time use, you will be asked to create a new, permanent pass phrase the first time you use the software.)

Please enter a security question and answer that our support staff can use to verify your identity if you ever forget your pass phrase.

Security Question

Answer

I certify that all information furnished is accurate and truthful. I also certify that I have read and understood the United States Postal Service Privacy Act Statement, Acknowledgement of Deposit, Endicia Terms and Conditions, and USPS Policy Regarding Shortpaid and Unpaid Postage.

- Fill out the *Endicia Payment Method* and *USPS Postage Payment Method*.
- Click the *Complete Sign Up* button to finish the account setup and obtain an Endicia Account Number.

Endicia Payment Method ?

Endicia Service Plan Payments
Your first 30 days of Endicia Label Server is FREE. After this free trial period, your credit card or Bill Me Later account will be charged a rate of \$0.00 per month. Endicia Parcel Insurance will also be billed to this account.

My Billing Address is the same as my Physical Address

Credit Card

Card Type Card Number Expiration Date

Bill Me Later The Shipping Express Lane [See Terms](#)

USPS Postage Payment Method ?

USPS Postage Payment Options
Please select a payment option for your postage. For organizations spending more than \$500/month, we recommend selecting the checking account option.

Use payment method above

From my checking account or other payment options (Select if you spend more than \$500 on shipping each month).

[Other Methods of Payment >](#)

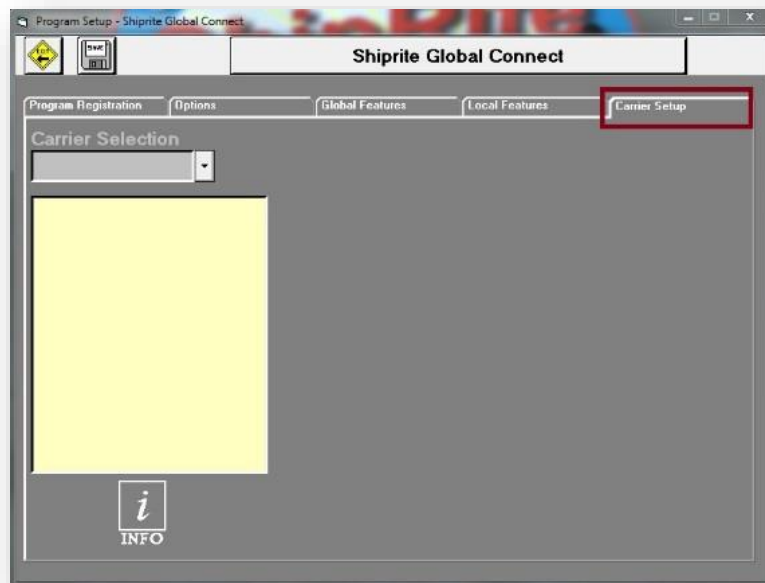
[Back to Previous Page](#) [Complete Sign Up](#)

Enter Endicia Credentials into ShipRite:

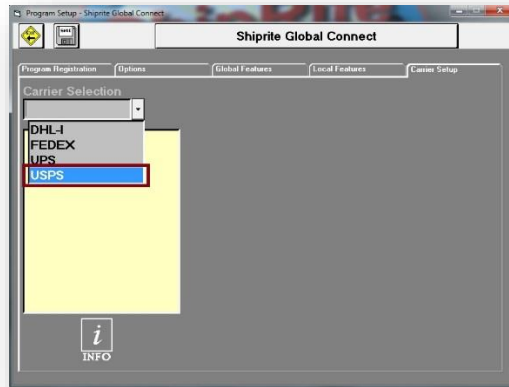
- From the ShipRite main menu, click *Setup > General Setup Options*.



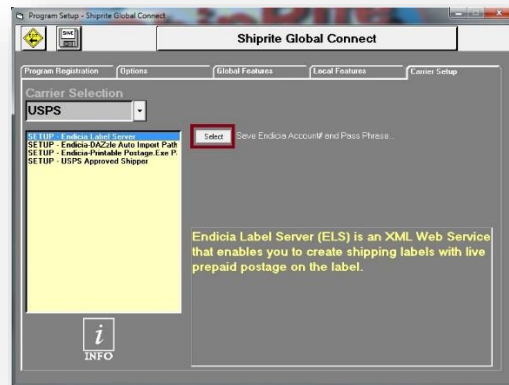
- Click the *Carrier Setup* tab on the right.



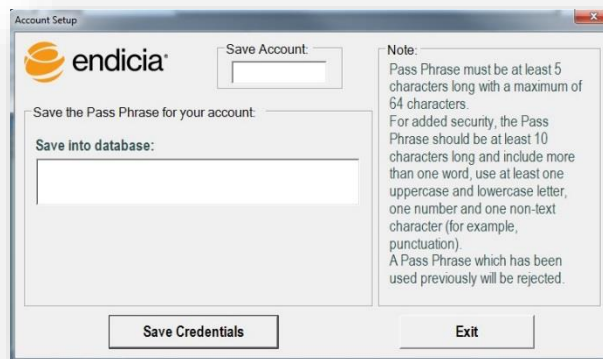
- Select USPS from the *Carrier Selection* drop-down menu.



- Select “*SETUP – Endicia label Server*” in the yellow-column.
- Click the *Select* button to enter your *Endicia Account Number* and *Pass Phrase*.



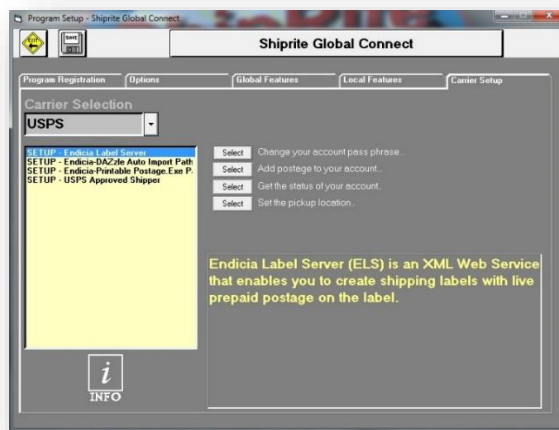
- Enter your *Endicia Account Number* and *Pass Phrase* into the corresponding textboxes.
- Click the *Save Credentials* button.



- Click the *Ok* button to proceed.

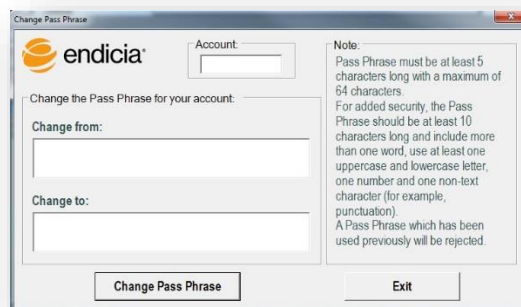


- Now, when USPS is selected from the *Carrier Setup* screen, you will have a different set of options to change your account pass phrase, add postage to your account, get the status of your account, and set the pickup location.



CHANGE YOUR PASSPHRASE:

- From the *Carrier Setup* screen, select USPS from the *Carrier Selection* drop-down menu, and select “*SETUP – Endicia Label Server*”.
- Click the *Select* button next to “*Change your account pass phrase...*”.
- On the screen that opens, type in your new Pass Phrase into the “*Change to:*” text box and click the *Change Pass Phrase* button.



ADD POSTAGE TO YOUR ACCOUNT:

- From the *Carrier Setup* screen, select USPS from the *Carrier Selection* drop-down menu, and select “*SETUP – Endicia Label Server*”.
- Click the *Select* button next to “*Add postage to your account...*”.
- Enter the amount of postage you wish to add and click the *Add* button.
- NOTE: You can also add postage while in the ShipMaster screen by clicking on the Endicia Logo

Buying Postage

endicia®

Account:

Note:

The minimum amount of postage that can be purchased is \$10.

The maximum amount is based on the settings of the account.

Any amount, at least \$10.00 and up to \$99,999.99, in unit of dollars and rounded to the nearest cent.

Account Balance:

Postage Balance: Remaining postage balance after recredit

Ascending Balance: Total amount of postage printed after recredit

Amount of postage, in dollars, to add to the account:

Add \$10.00 to the account

Add Exit

GET ACCOUNT STATUS:

- From the *Carrier Setup* screen, select USPS from the *Carrier Selection* drop-down menu, and select “*SETUP – Endicia Label Server*”.
- Click the *Select* button next to “*Get the status of your account...*” to show the account balance and account specifics.

Account Status

endicia®

Account:

Note:

The Label service is running in Test mode. The data for AccountStatusRequest XML (GetAccountStatus) has been validated.

Account Balance:

Postage Balance: **\$178.90** Remaining postage balance after recredit

Ascending Balance: **\$4,295,967** Total amount of postage printed after recredit

Account Specifics:

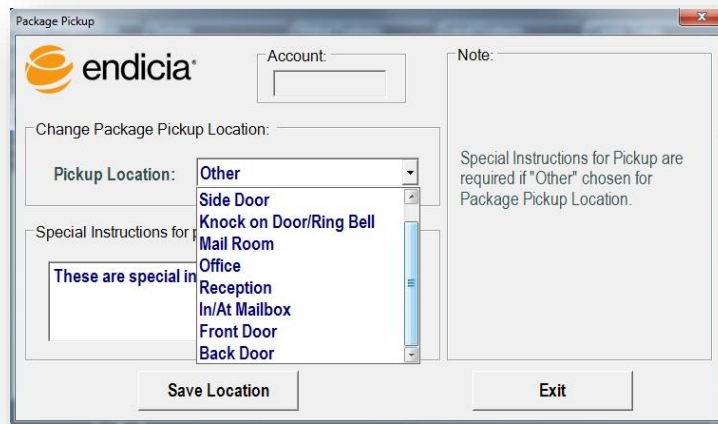
Account Status: **A** Account Status flag: A = Active

Device ID: **FakeDeviceID** The account's 12 character Device ID

Refresh Exit

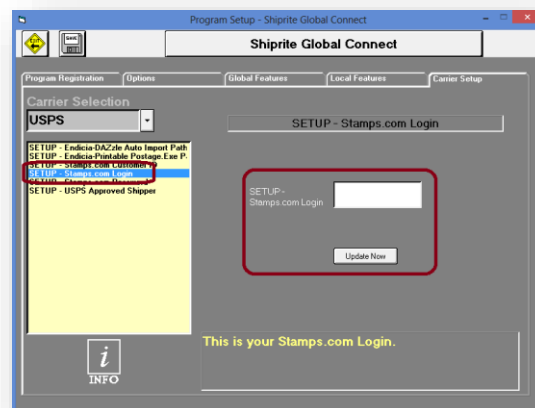
SET PICKUP LOCATION:

- From the *Carrier Setup* screen, select USPS from the *Carrier Selection* drop-down menu, and select “*SETUP – Endicia Label Server*”.
- Click the *Select* button next to “*Set the pickup location...*”.
- Use the drop-down menu to select a *Pickup Location*; enter any special instructions if necessary.
- Click the *Save location* button.



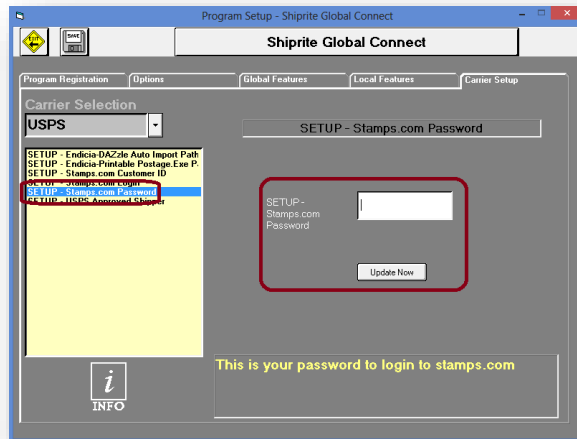
IF USING STAMPS.COM:

- Select '*SETUP - Stamps.com Customer ID*'.
- Enter your Stamps.com customer ID in the corresponding textbox.
- Click the '*Update Now*' button, then click the '*Save*' button.



- Select '*SETUP – Stamps.com Login*'.
- Enter your Stamps.com login in the corresponding textbox.

- Click the *'Update Now'* button, then click the *'Save'* button.



- Select *'SETUP – Stamps.com Password'*.
- Enter your Stamps.com password in the corresponding textbox.
- Click the *'Update Now'* button, then click the *'Save'* button.

FOR USPS APPROVED SHIPPERS:



- Select *'SETUP – USPS Approved Shipper'*.
- If you're an approved USPS shipper, click the *'Check if Applied'* checkbox.
- Click the *'Update Now'* button, then click the *'Save'* button.

SETUP – USPS RSA RATE - If you are a Premium member of Retail Shipping Associates and participate in their USPS RSA Rates program, "Check if Applied" checkbox Click the Update Now button and Save.

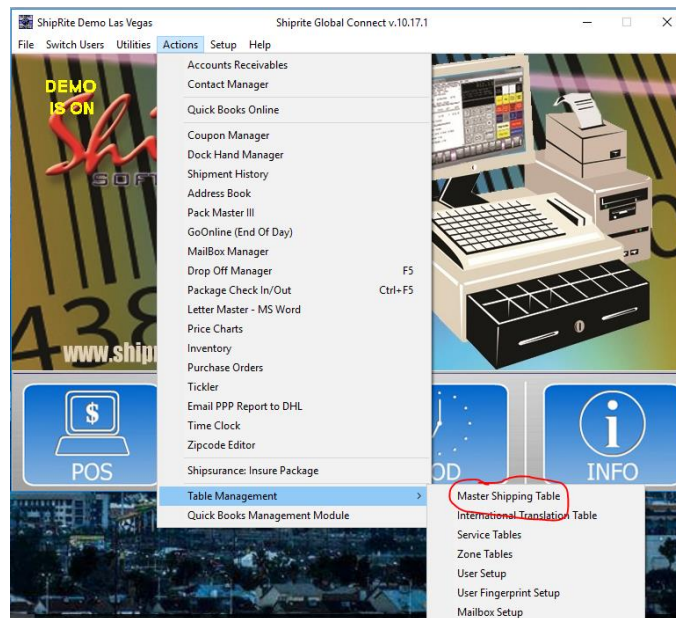
TABLE MANAGEMENT & UTILITIES

MASTER SHIPPING TABLE

The Master Shipping Table will allow you to set markups on your FedEx, UPS, DHL, and USPS shipping services. You can also make adjustments to carrier packaging, such as the dimensions and pricing, as well as, set the pricing for accessorial charges, which are the additional charges and fees associated with shipping a package.

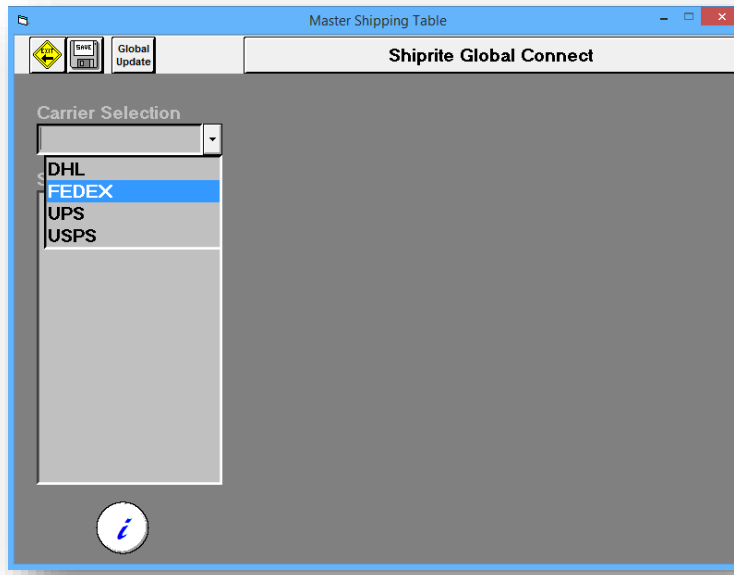
To access the Master Shipping Table:

- From the ShipRite main menu click Actions > Table Management > Master Shipping Table.



Once in the Master Shipping Table, we can change the markups associated with shipping a package. Using FedEx as an example, let's change our markup cost.

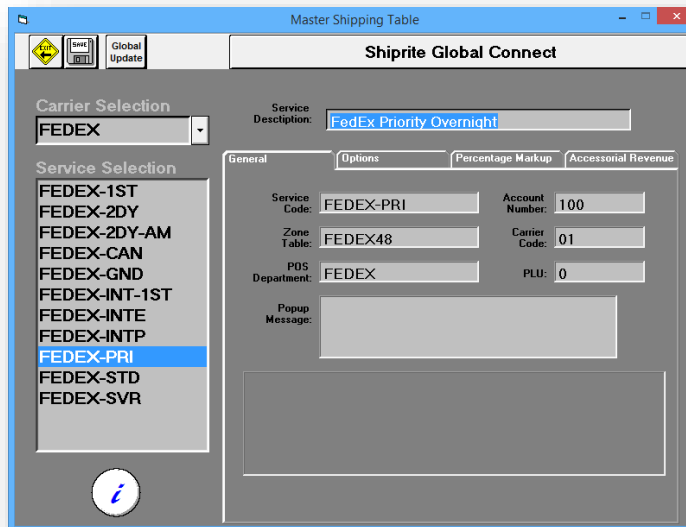
- Select FedEx from the drop-down menu.



- Next, let's assume we want to make changes to the markup on FedEx Priority service; each service will need its markup set.
- Select FEDEX-PRI in the left-hand column.

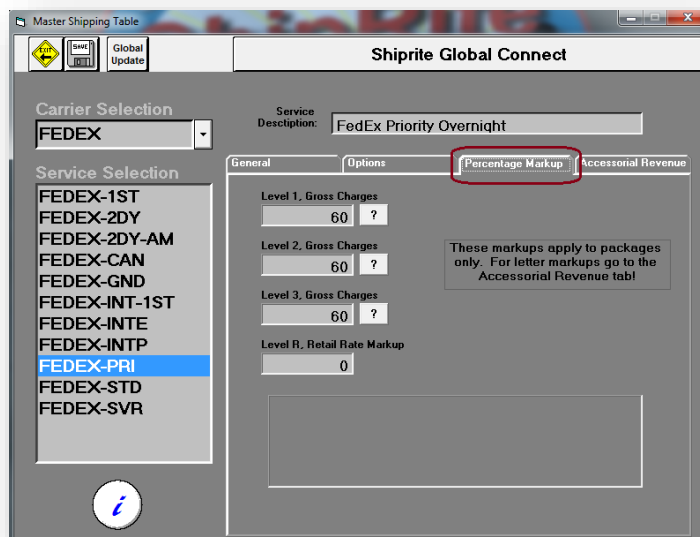
1. GENERAL

- The General tab contains information regarding this particular carrier's service, zone, and department. These values should be left as their default.



2. PERCENTAGE MARKUP

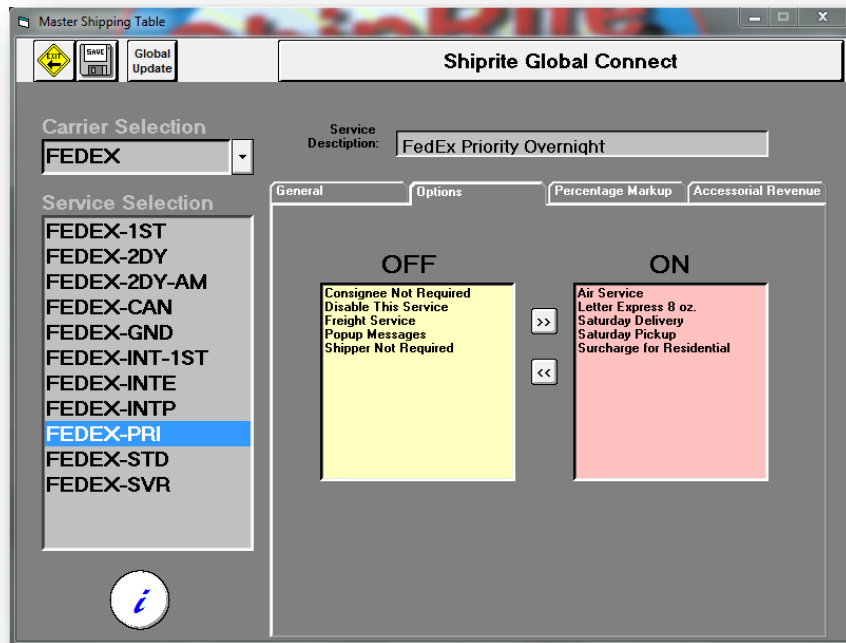
- Click the *Percentage Markup* tab.



- Change the markup percentage, as needed, for each tier level.
- The 3-tier markup system allows you to easily manage your profit markups for a wide range of services based on the price. These ranges are established in the *General Setup* of the program.

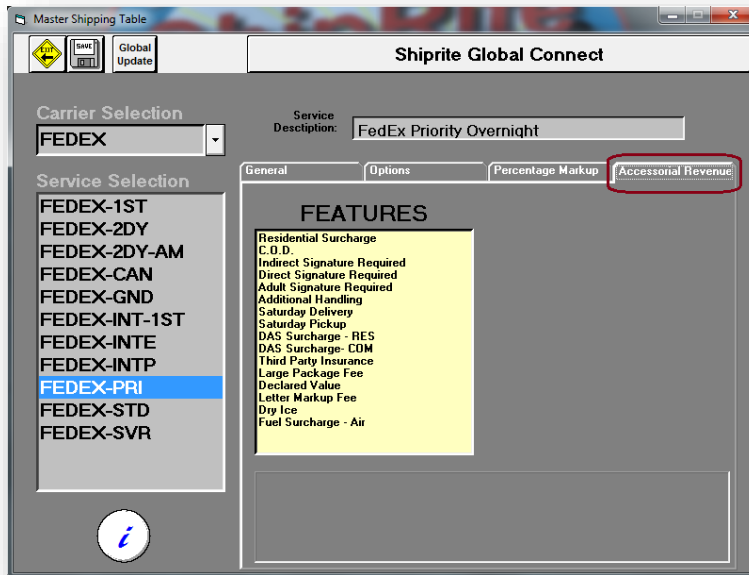
3. OPTIONS

The options should be left to their default settings, however, they can be turned on/off by using the arrows to move the selection to the appropriate window.

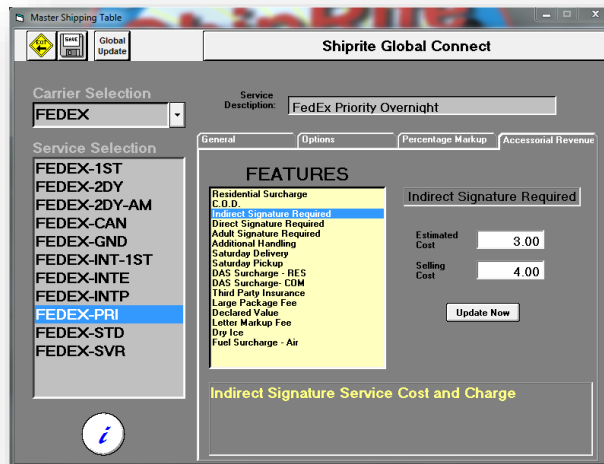


4. ACCESSORIAL REVENUE

The accessorial revenue tab allows you to set your pricing for all the additional charges associated with shipping a package, such as Delivery-Area-Surcharge, Saturday Pickup/Delivery, Signature fees, etc.



- Select one of the Accessorial charges, for example, *Indirect Signature Required*



- Change your selling cost
- Click the Update Now button and then Save in the upper-left

3. TABLE MANAGEMENT & UTILITES

A. MASTER SHIPPING TABLE

1. UPS:

From the Main Menu, click on the Actions pull down menu, click on Table Management, and then click on Master Shipping Table, select UPS. You can set up any UPS service. For example, UPS Next Day Air has been chosen here. There are four tab controls: General Setting, Options, Percentage Markups, and Accessorial Revenues.

A. GENERAL SETTING

Service Code, Zone Table and Carrier Code: Do not change these unless ShipRite Software directs you.

Account No.: This is your account number.

**This is normally included with your installation CD, if you have to add or change this for any reason the alpha characters, if present in your account number, must be in CAPS.

POS Department: This assigns all sales of this product to an existing POS department.

PLU: This is the inventory item that will be associated with this to track in sales reports.

Pop Up Message: This is useful as a training tool or a reminder. Basically, when this service is selected in the ShipMaster, the message entered here will pop up. This message must be enabled in the next section: Options. A typical message might look like this: "Next Day Service is usually delivered by 10:30am the following business day".. or "NO LITHIUM BATTERIES or any other Hazardous, Illegal, Dangerous or Prohibited Materials".

Carrier Selection: UPS

Service Selection:

- 1DAY
- 1DAYEAM
- 1DAYSVR
- 2DAY
- 2DAYAM
- 3DAYSEL
- CAN-STD
- CAN-XPED
- CAN-XPRES
- COM-GND
- WWXPED
- WWXPRES

Service Description: UPS Ground

General | Options | Percentage Markup | Accessorial

Service Code: COM-GND | Account Number: R7V514

Zone Table: GROUND | Carrier Code: 4-1

POS Department: UPS | PLU:

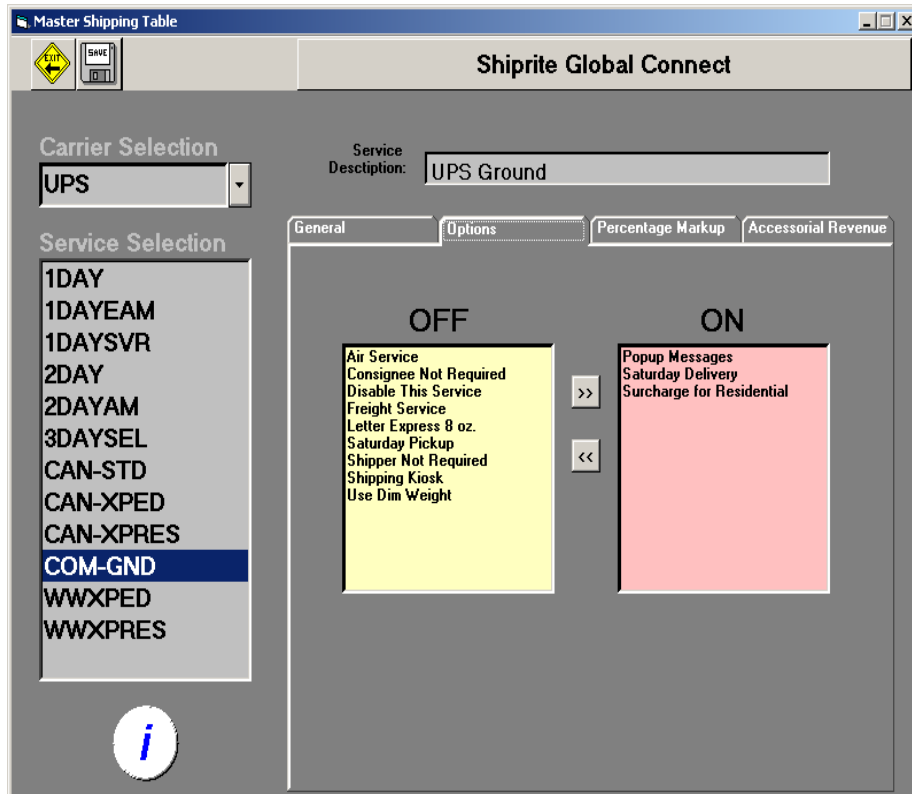
Popup Message:

Enter Pop up Message here:.

Dept MUST match your POS departments in General Setup

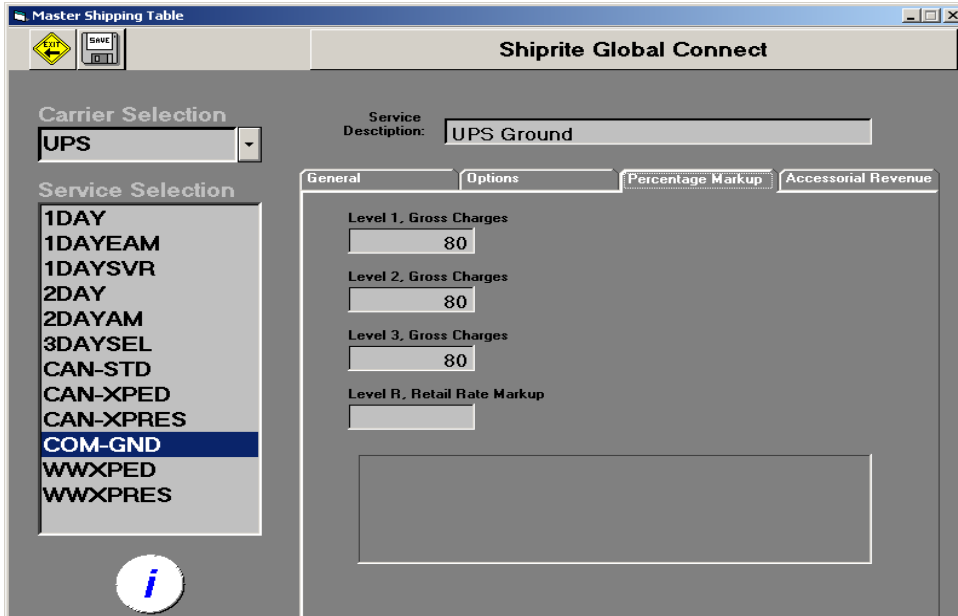
B. OPTIONS

These items should be set by default. If not, move them from the OFF to the ON side and visa versa as needed



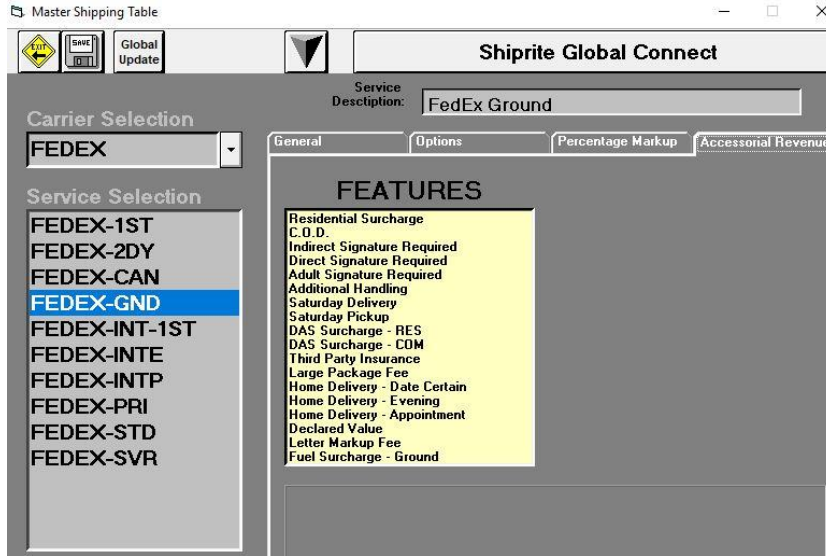
C. MARK UP

(Percentage Markups): You can enter the mark up % for parcels shipped. This mark up % is applied to the service chart for this service according to the 3 levels set up in [Chapter 2](#). For flat fee mark up for Air Letters, see the next section “Accessorial Revenue”



D. ACCESSORIAL REVENUE

Your selling prices here for accessorial items.



2. DHL, FEDEX AND USPS:

These services are set up the same as UPS's procedures. . This is ingested from your linkage mailbox from DHL.

3. TABLE MAINTENANCE: SERVICE TABLES, ZONE TABLE MANAGEMENT AND INTERNATIONAL TRANSLATION TABLES.

A. SERVICE TABLES

From main menu, go to Action on the top of your screen, click on Table Management, and select Service Table. You can view a shipping service's base rate chart on the right by clicking on the service link on the left. If a service is not listed on the left that means it is not available to you. 1DAY service is being selected here.

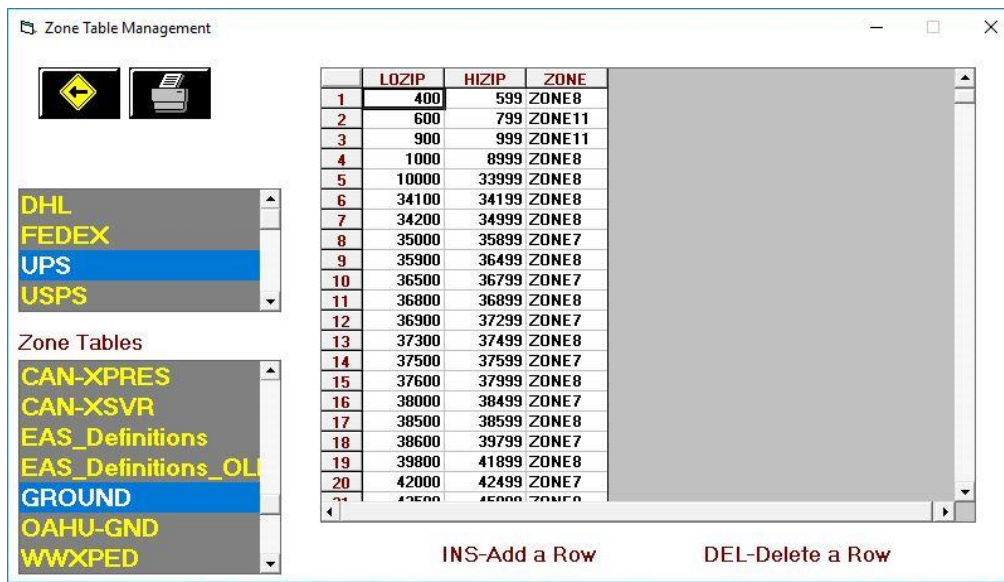
LBS	ZONE102	ZONE103	ZONE104	ZONE105	ZONE106	ZONE107	ZONE11
-1	1.00	1.00	1.00	1.00	1.00	1.00	1.
0	12.75	14.25	15.00	15.50	16.00	16.75	17.
1	14.75	17.50	20.75	22.50	24.50	25.75	26.
2	15.75	18.75	23.25	25.25	27.50	28.50	29.
3	17.25	19.75	25.75	27.75	30.50	31.50	32.
4	18.25	20.75	28.25	30.50	33.25	34.25	35.
5	19.25	22.00	30.50	33.00	36.00	37.00	38.
6	20.00	23.00	32.75	35.50	38.75	40.00	41.
7	20.75	24.50	35.00	38.25	41.75	42.75	43.
8	21.50	25.75	37.25	40.75	44.75	45.75	46.
9	22.25	27.00	39.75	43.25	47.75	48.75	49.
10	23.00	28.25	42.00	45.75	50.25	51.50	52.
11	23.75	29.50	44.25	48.00	52.75	54.50	55.
12	24.50	30.50	46.50	50.50	55.25	57.25	58.
13	25.25	31.50	48.75	52.75	57.50	59.75	60.
14	26.00	32.75	50.75	55.00	59.75	62.25	63.
15	26.75	34.00	52.75	57.25	62.00	64.25	65.
16	27.75	35.00	54.25	59.00	63.75	65.75	67.
17	28.50	36.00	55.75	60.75	65.50	67.25	69.
18	29.25	36.75	57.25	62.25	67.00	68.75	71.
19	30.00	37.50	58.75	63.75	68.50	70.50	73.

INS-Add a Row DEL-Delete a Row

For those who have DHL, you select their chart from the list on the left. You can then directly input the correct rates from those carriers if they are not already included with ShipRite. If the rates are provided to you by the carrier that are in MS Excel format, you can just use COPY and PASTE to update your chart above.

B. ZONE TABLE MANAGEMENT

This is the ZONE table maintenance. If you have a zone popping up in any of the carriers that is not correct, check it in here first. You can correct any zone problems in this screen.



The Service and Zone tables are just like a spreadsheet. If a zone is not correct, just change it to the correct one.

Editing Keys:

- DEL – will DELETE the current row. Use the Backspace Key to erase entries on the line.
- INS- will INSERT a ROW at the cursor position.

C. INTERNATIONAL TRANSLATION TABLES

A name of a country is listed different from different shipping companies. China is an example: UPS, FedEx and DHL list it as China, but USPS lists it as Peoples Republic of China. If you cannot find the right codes for international shipping, you look for it and fill it out in the International Translation Table.

There are three functional buttons in the International Translation Table: Add a country (Plus icon), Delete a country (Minus icon, red color) and Refresh view (Cloud icon).

Lookup	UPS	FEDEX	AIRBORNE	USPS	DHL
Panama					
Papua New Guinea					
Paraguay					
Peoples Republic of C China		China	China	Peoples Republic of C	
Peru					
Philippines					
Poland					
Ponape					
Portugal					
Puerto Rico					
Qatar					
Republic of Congo					
Republic of Ireland					
Republic of Yemen					
Reunion					
Romania					
Rota					

review

USER SETUP

UserID: KAROLINA Password: *

FullName: KAROLINA GRUNBERG Phone: 422 - 5433

OFF **ON**

Reports

Shipping
Suspend Shipping
Name/Address Table
All Other Tables
Pickup Records
Inc & Production Rpts
Tracking Files
Utilities Menu
General Setup
User Accounts
POS

Give user access to view package prices

5. MAILBOX SETUP: THIS WILL BE EXPLAINED IN [CHAPTER 10](#).

B. UTILITIES

The Utilities is usually used by your tech support personnel – do not use unless instructed to do so.

From the main menu, you will see the Utilities pull down menu. There are 11 options under Utilities Menu: Inventory update, Fix invoice balancing, Data Model Manager, Merging Contacts or Accounts, Create SR Support Text file, Button panel utilities, Extract data by Table, Synchronize RecQty to Qty in PO's, Initialize Invoice Inventory, Create Shiprite_update.mdb, Force closer a drawer.



1. INVENTORY UPDATE



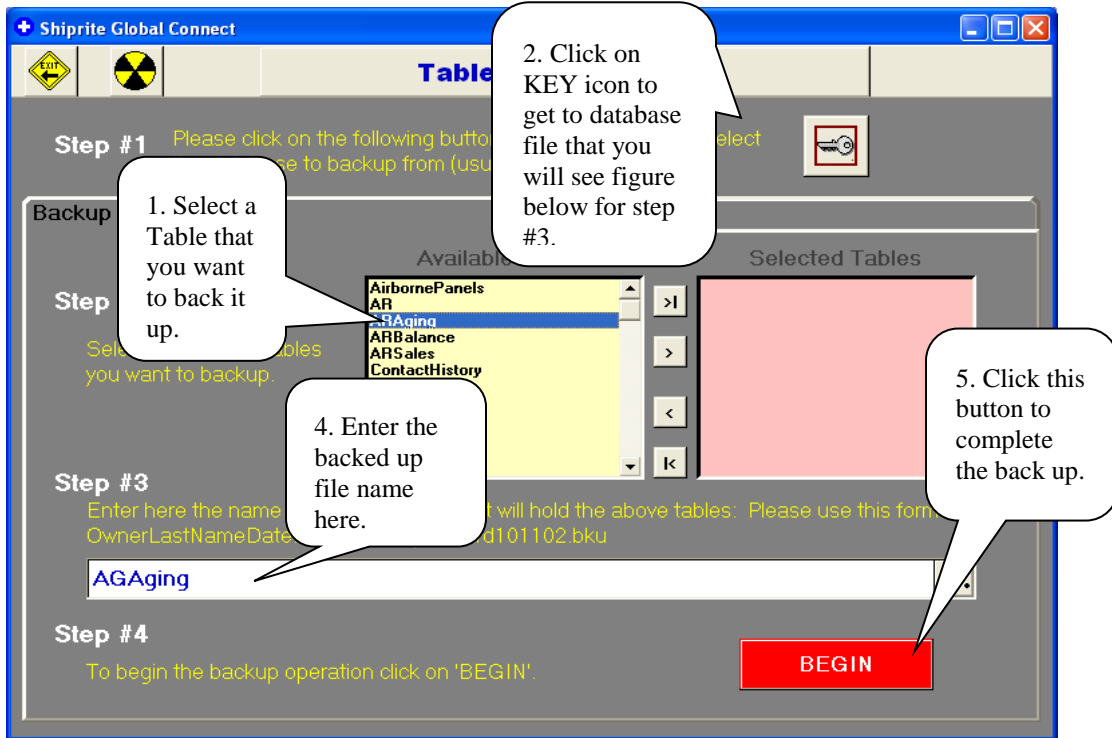
This is used to Export or Import your Inventory tables

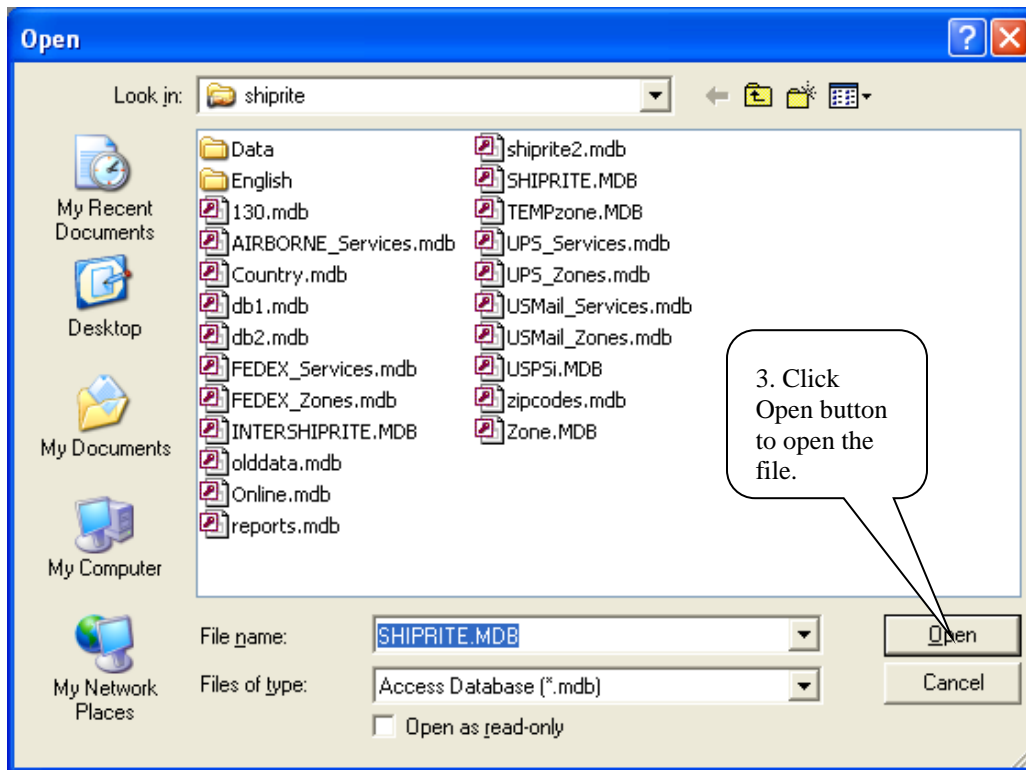
2 FIX INVOICE BALANCING

This is a utility created to balance invoices that may have been off due to rounding, etc.

3 DATA MODEL MANAGER

This function is used to back up the database. For example, if you want to back up Accounts Receivable Aging, select ARaging button, click on the Key icon. To open this file, click on OPEN button, and then enter ARaging in the text box, and click on BEGIN button. Finally, click on OK button after the Back Up operation is completed.



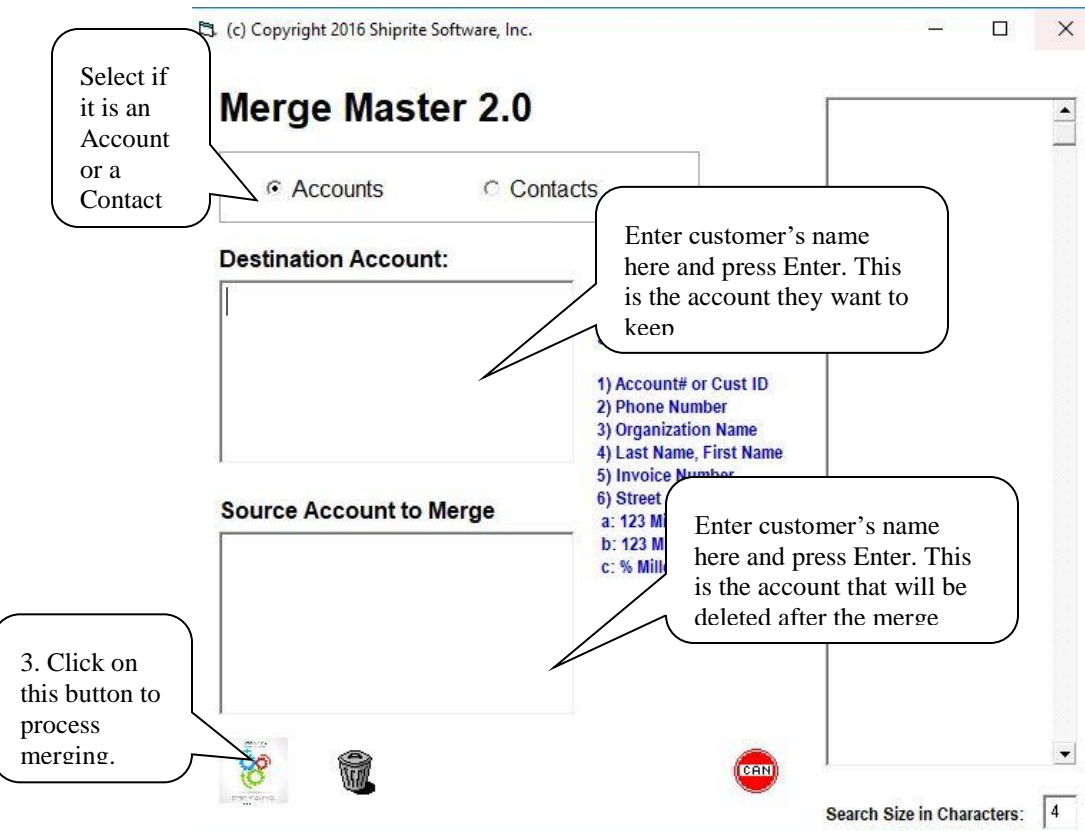


4 MERGING CONTACTS OR ACCOUNTS

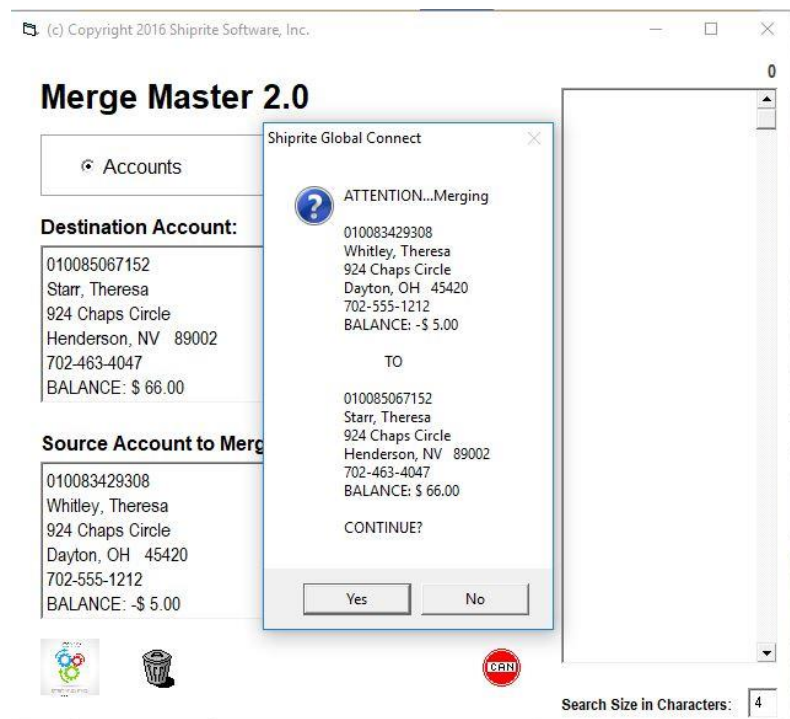
Merging Contacts or Accounts is designed to merge duplicate information into one.

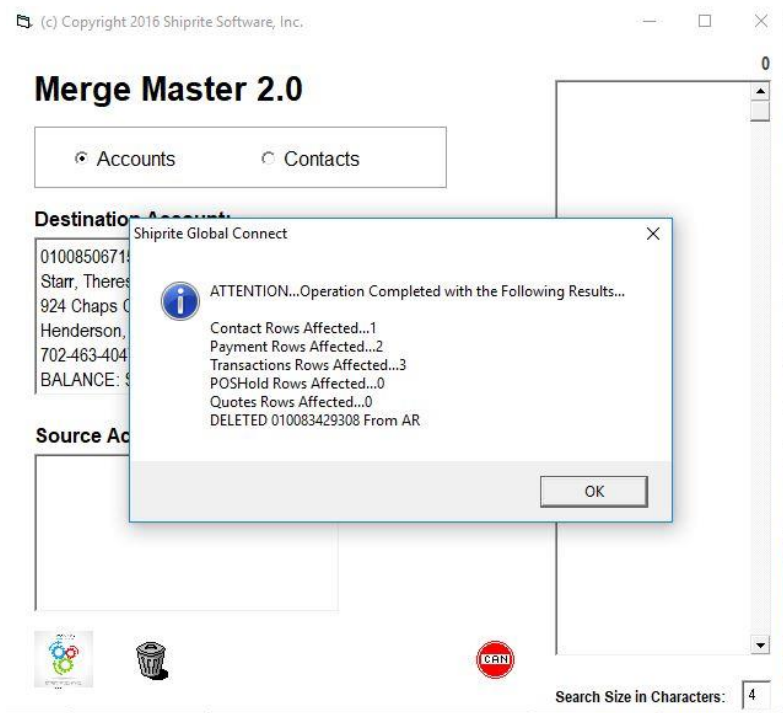
A customer has two different names, addresses or phone numbers or two different accounts in your database that she wants to merge it into one. In the top text box, The Destination Account, enter customer's name and hit Enter. A list will appear. Select the Contact or Account you want to KEEP. In the lower box, Source Account to Merge, enter the customer's name and hit Enter. Select the duplicate name and double click on it. This information will be merged into the Destination account and then will be deleted.

The process is the same for merging Contacts or Accounts. Just click which one you want. Merging accounts will combine all history including transactions, invoices, payments, balances, etc.



Here the customer wants to merge her maiden name with her married name. She wants to keep the name Starr.





After the merge, the Destination account is remaining and the source account has been deleted.

5. CREATE SR SUPPORT TEXT FILE

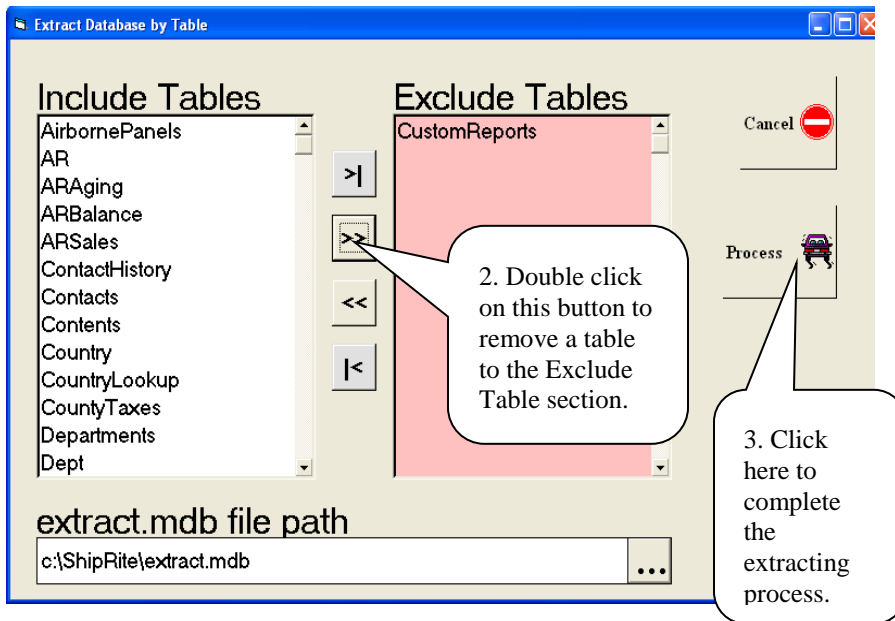
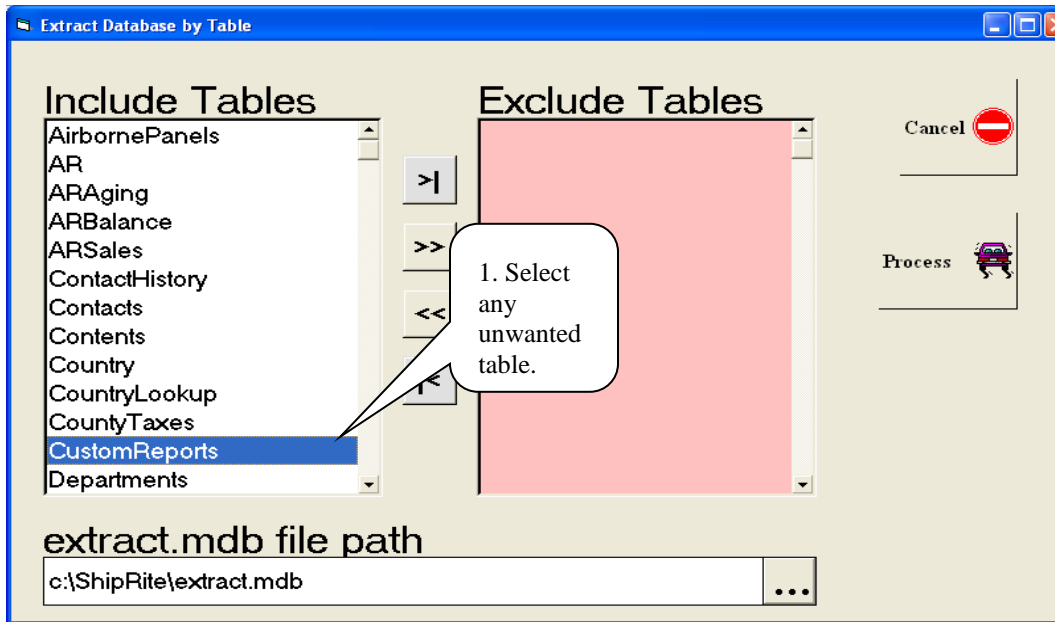
Not used at this time

6. BUTTON PANEL UTILITIES

This was a utility created to Export or Import the button panel

7 EXTRACT DATA BY TABLES

If you want to exclude any table of ShipRite in your database, you can shift it to Exclude Tables section. Select a table in the Include Tables section, and double click on Double Arrow icon, and then click on Process button, unwanted table will be shifted to the Exclude Table section. **It is not recommended to do this without direction from a ShipRite Support**



8. SYNCHRONIZE RECQTY TO QTY IN POS:

Copies the Qty field to the RecQty field in every record in the PurchaseOrders table.

So it seems the Received Quantity is set to the Order Quantity for each Purchase Order and so the RecQty and Qty are synchronized in the PurchaseOrders.

All of tables above function automatically if you want to reset it. ShipRite works properly if you restart the program every time you reset it

9. INITIALIZE INVOICE INVENTORY:

Initializes the Logging.mdb database which logs the Invoice Numbers used in the POS.

10 CREATE SHIPRITE_UPDATE.MDB

Creates a Shiprite_Update.mdb using the current Shiprite.mdb. (Copies the Shiprite.mdb -> Shiprite_Update.mdb then clears all tables in Shiprite_Update.mdb).
Shiprite_Update.mdb is used to rebuild the database using the Shiprite_Optimizer.

11 FORCE CLOSE A DRAWER

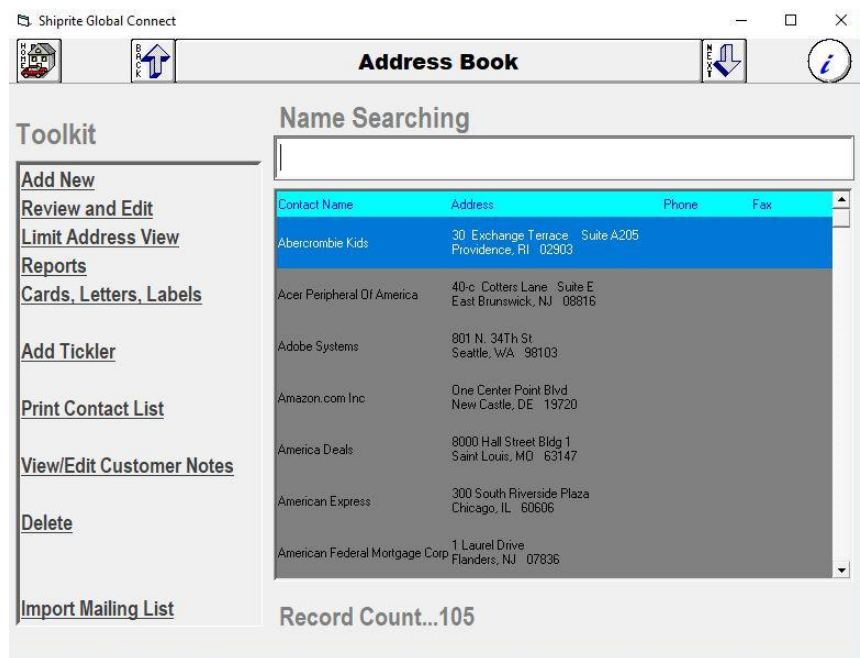
Force closes a specified Drawer#. For the selected Drawer#, any CloseID = NULL or CloseID = 0 is assigned the NextCloseID in the OpenClose, Payments, and Transactions tables

4. CONTACT MANAGER/ADDRESS BOOK

This is a very important feature. Correct use of this will enhance the operation of the ShipRite Software. This is where you can edit or enter the contact's information of customers, shippers and consignees. You can add and delete customers, shippers and consignees. You can keep track of customer accounts such as purchasing and shipping history, and billing statements. You can print contact lists and send cards or letters.

A. ADDRESS BOOK

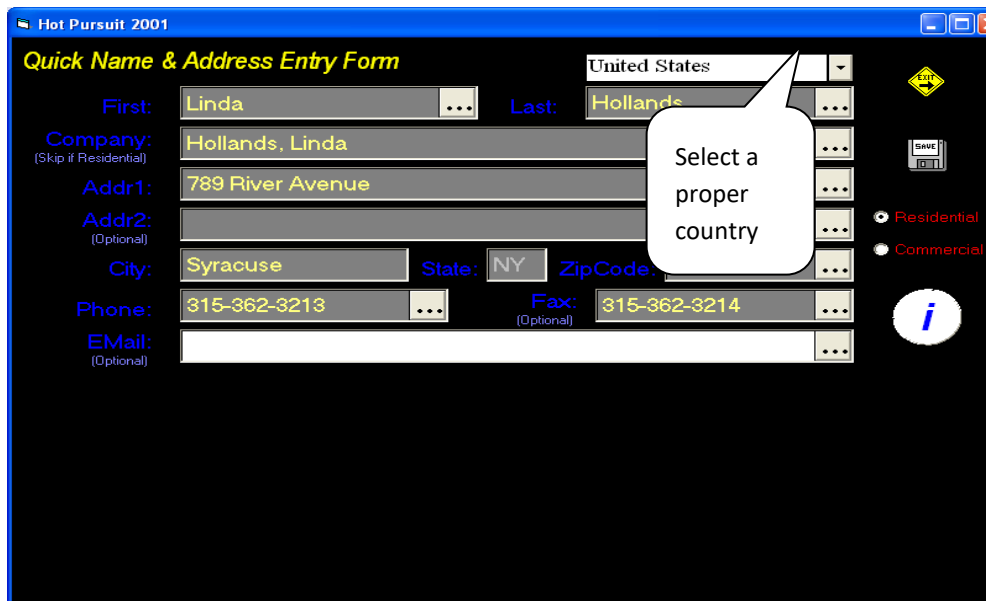
From Main menu, go to the Actions pull down menu, and then select Address Book. This is the only way to access the address book.



1. ADD NEW

Click on Add New, it will take you to the Quick Name & Address Entry Form. You can add contact information for a new customer, shipper and consignee here.

Click on the drop down menu and choose the correct country. The default is the United States. Fill out all fields for First name, Last name, Company (skip it if Residential), Address 1, Address 2, City, State, Zip Code, Phone Number, Fax number and email address. If an address is in the United States, after you type in the last digit of the zip code, the search for the city/state will be initiated. If there is a multiple match of more than one city for that zip code, a drop down list will open. Select the proper city name from the list and press Enter. If the phone number is needed, enter it next. There is a spot for a second phone number or a fax. The Contact Manager will automatically determine whether the Contact is residential or commercial. The method is simple: For residential, the Contact Manager looks for a COMMA. If there is a comma (Last name comma, First name), it will be flagged as Residential. If this is Commercial, the Contact Manager looks for a single name with no COMMA. If either of these conditions are met, the Contact is flagged as Commercial. Save your work and then exit out of it



2. REVIEW AND EDIT

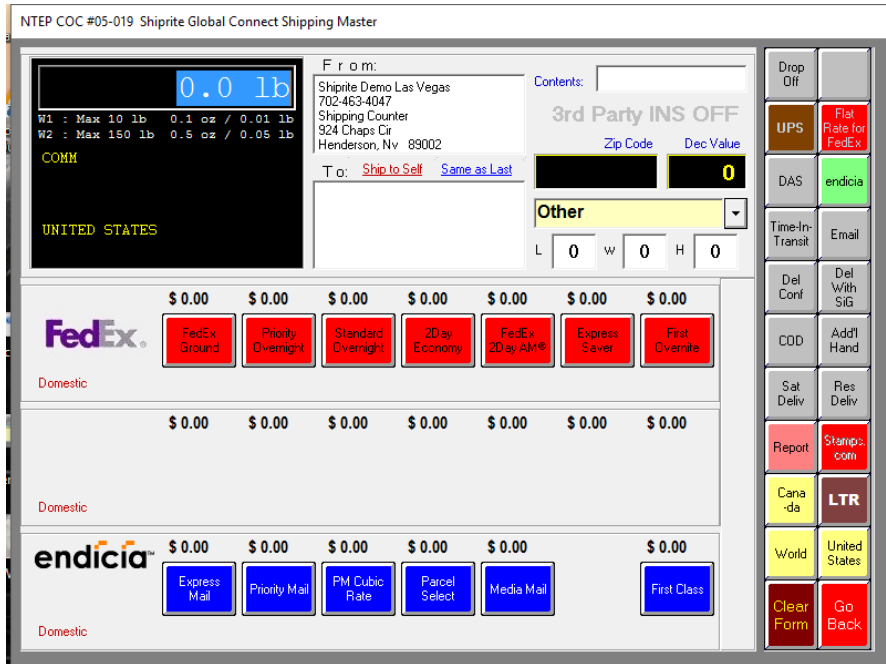
Select a name that you want to change her/his contact information, and then click on Review and Edit. You can edit name, address, phone number by either double clicking on the contact field or click on Edit Name & Address button. That will take you to Quick Name & Address Entry Form where you can make the change. There are two ways to edit the contact category: You can change Contact Category by double clicking on the contact category in the box on the right (Consignee), and then click the Contact Category. Or you can delete Contact Category in the box (Shipper), and type the new category as Consignee. Remember to update your work after you change it.

B. NAME SEARCH LIST:

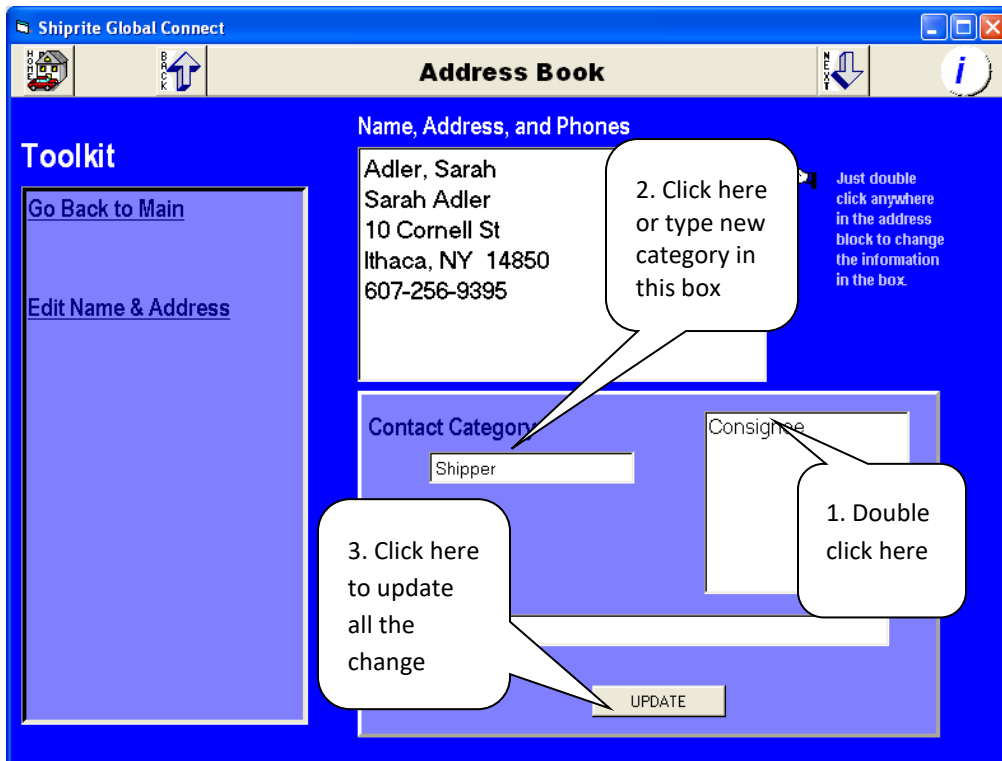
- There are four areas to open up Name Search List:

- From the POS, select Customer Look up under the Actions pull down menu. This will take you to Name Search list.
- From the POS, click on the Customer Look up button. This will take you to Name Search List.
- In the ShipMaster window, tab to SHIP FROM field, press Enter that will take you to the Name Search List.
- In the ShipMaster window, tab to SHIP TO field, press Enter that will take you to the Name Search List.

To perform the searching process, type the last name comma first name for residential address and company name for commercial address in the Search List. Select the name that it is highlighted, and then click OK. If you do not see it there, continue entering the information and click Save/Select.



You can search for the name from the POS: Tab to the SHIP FROM or SHIP TO field, type last name comma first name for residential address and company name for commercial address. The address will be displayed as long as it matches w/ a name of a shipper or consignee. If there is not any existing contact display that you are looking for, press Enter. You can add it to the Name & Address Entry Form.



3. DELETE

Select a name that you want to remove her/his contact information from your database, and then click on Delete button. You will see the Record Count goes down.

4. LIMIT ADDRESS VIEW

IF SEARCHING FOR SPECIFIC CUSTOMER NAMES, YOU CAN USE DIFFERENT SEARCH FIELDS TO DO THIS. I.E. ENTER NY IN THE STATE FIELD AND ALL NY CUSTOMERS WILL BE LISTED

5. REPORTS

YOU CAN PRINT THREE (3) SEPARATE REPORTS

Address Listing alphabetically

Address Listing by level (consignee, shipper)

Contact sheet

6. CARDS, LETTERS, AND LABELS

This is used for the mail merge. Running this report will allow you to print address labels based on the search criteria you have chosen.

7. ADD TICKLERS

Add reminders for Mailbox Renewal due dates and low inventory on hand. Select a name and then click on Add Tickler button that will open up the Tickler Detail form. You can type a reminding message in the Detail box, and select the due date from the calendar and then click on Due Date and Time box. Save all your work. When you open up the program, you will see a reminding message pop up with the due date in the Tickler view.

To Do Detail Today is Monday, August 28, 2017

Date/Time Recorded: 6/26/2017 11:44:01

Taken for Employee: Manager

Regarding Client:

Category for Action: Inventory Low

Details: SMALL ENVELOPE (ENVELOP-SM) - Inventory Below Threshold

Due Date and Time: 6/26/2017

Status:

 Open

 Closed

Completed By:

Emergency
 Urgent
 Routine

 Low
 No Action

Exit

 Save

 Clear

D. ACCOUNT RECEIVABLES

There are two ways to review a customer's account from the POS:

- Select Customer Look Up option under the Actions pull down menu. That will take you to the Name Search List. Select a name to review their account.
- Click on the Customer Lookup button on the bottom of the POS screen. This will take you to Name Search List. Select a name to review their account.

You will see a customer's contact information in the bottom of POS screen after you have used one of the methods as described above. Right click where the contact information is displayed. Select Review Customer Account option. This will take you to the Account Receivables screen. There are six function tabs that you can review customers' purchasing and shipping history, and billing statement. You can edit tax status, shipping and purchasing marks up here. These useful features will be explained later in [Chapter 8](#).

Accounts Receivable

File Actions Bulk Check Bulk Credit Card

ACCOUNTS RECEIVABLE

Account Number, Account Name, & Terms

010083429308 Whitley, Theresa

Functions

General

Account Ledger

Miscellaneous

Statements

History

Contacts

First Name, Last Name

Theresa Whitley

Address Block

924 Chaps Circle

Dayton OH 45420 RES OFF

Phone: 702-555-1212 Fax:

Account Balance & Aging

Balance	Current	Plus30	Plus60	Plus90	Plus120
(\$ 5.00)	(\$ 5.00)	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

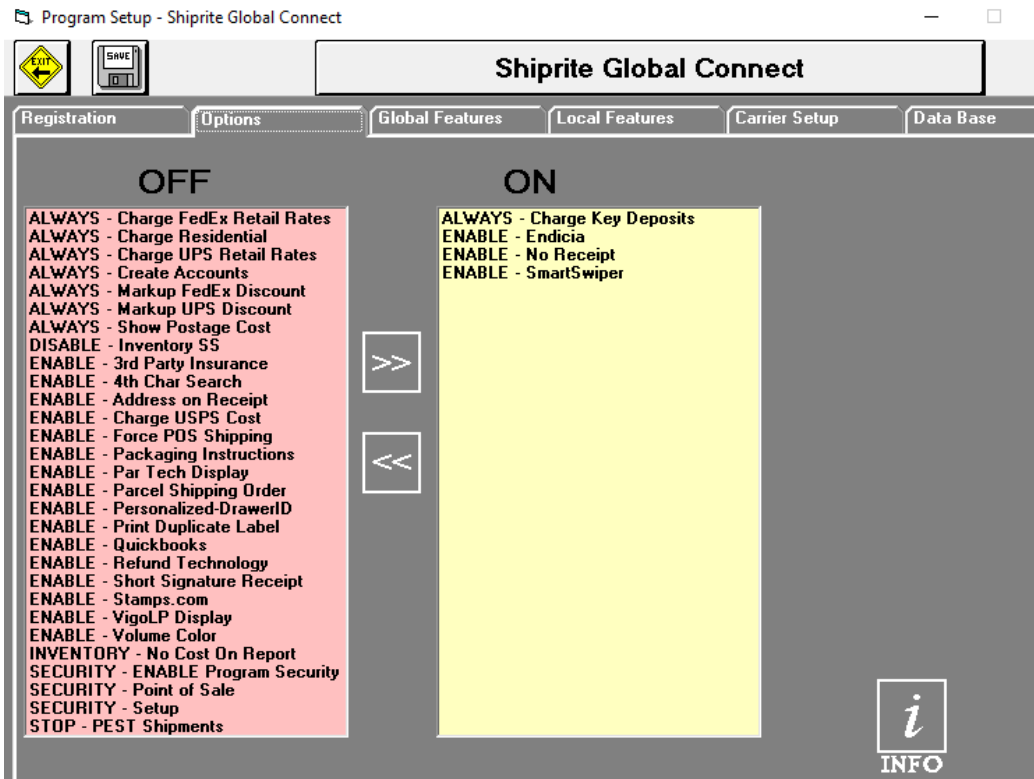
5. SECURITY

ShipRite V10 has three interconnected security systems that can operate independent of each other. There is System Security, POS Security and Setup Security. Before enabling security systems, User Accounts must be set up first as described in [Chapter 2-E-7](#). To enable any of the 3 security systems, go to SETUP: GENL SETUP: OPTIONS. Then move the desired security settings to the ON side. For the highest security, move all 3 security options to the ON side.

A. SYSTEM SECURITY

When this system is enabled, start the program and the user must log in. When logged in, the user can only have access to those areas allowed by the system administrator. The system administrator is usually the storeowner and has access to all functions. A clerk typically would be limited to only those areas of the program that allow them to ship and sell. To Setup system security, from the Main Menu, go to Setup - General Setup Options, click on the Options tab. To turn on the SECURITY-ENABLE Program Security by select it first and then click on double arrows icon, to move it to the ON column. Now

System Security is on. Save and Exit the program completely, and then go back in. Upon re-entry, you will be required to log in with your security code.



B. POS SECURITY

When enabled, this requires the user to enter their security code prior to making a sale. This will tag each sale to a particular user for audit purposes. Setup of the users for POS Security is exactly as the same in System Security. After the user Accounts are set up, from the Main Menu, go to Setup - General Setup Options, click on the Options tab, select SECURITY-Point Of Sale and then click on the double arrows icon to move it to the ON column. Make sure you click SAVE, then exit. Enabling POS Security will allow you to:

1. See who makes each sale
 1. Track Clerk performance relating to sales
 2. Cash Accountability
 3. Open/Close Drawer
 4. Track Void or Cancelled Sales

C. DATABASE SECURITY

Setup of Database Security is exactly as the same in POS Security.

From the Main menu, go to Setup, General Setup Options, click on the Options tab, select SECURITY-Setup, and then click on double arrows to move it to the ON column. At that point, no one can get into the Setup screen and perform any type of setup for user accounts and the POS unless they have a security code. Database Security Setup is to forbid people from getting into the MS Access Database without using your password. That means no wiz-bang genius can open the database and make changes.

Make absolutely sure that at least one user has access to all areas.

6. LETTER MASTER

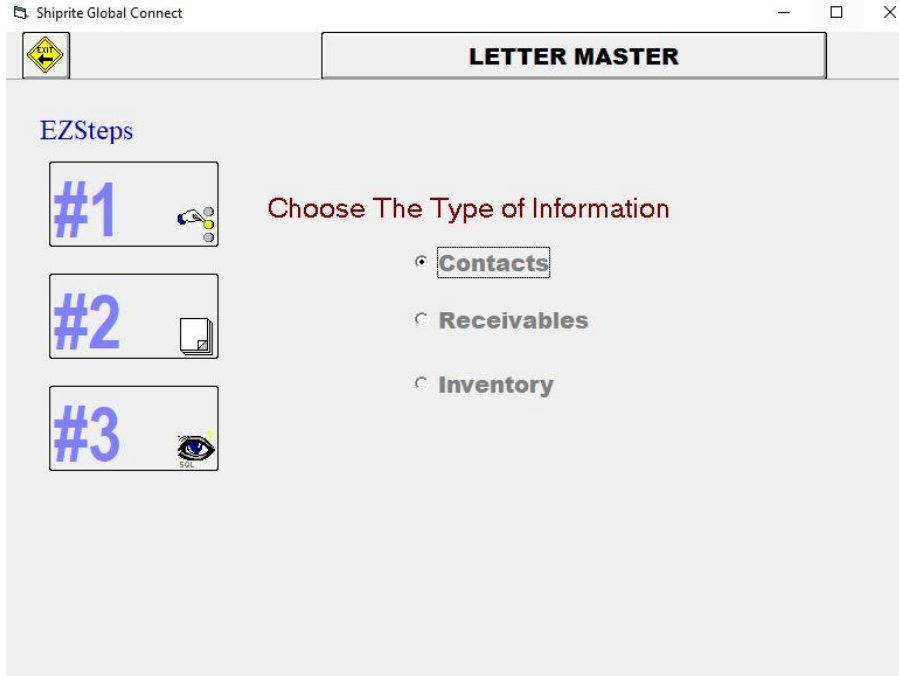
A. LETTER MASTER SETUP

In order to use this feature, make sure you have Microsoft Word installed on your computer and the correct paths entered for the program files. If you have the incorrect paths, you will get a File Not Found error. Here is how to fix it: Go to Setup: General Setup Options: Local Features: Click on SETUP-Find MS Word Program and SETUP-Find MS WordPad Program. The correct paths should be entered automatically and remember to save your work. Click on SETUP- Microsoft Word Instruction, and WordPad will open up. Print the instructions for setting up the merge program. This will allow you to pull your contact list into a Word Merge which will allow you to print address labels, mailings based on your customer contact list. This Feature will NOT function without MS Word.

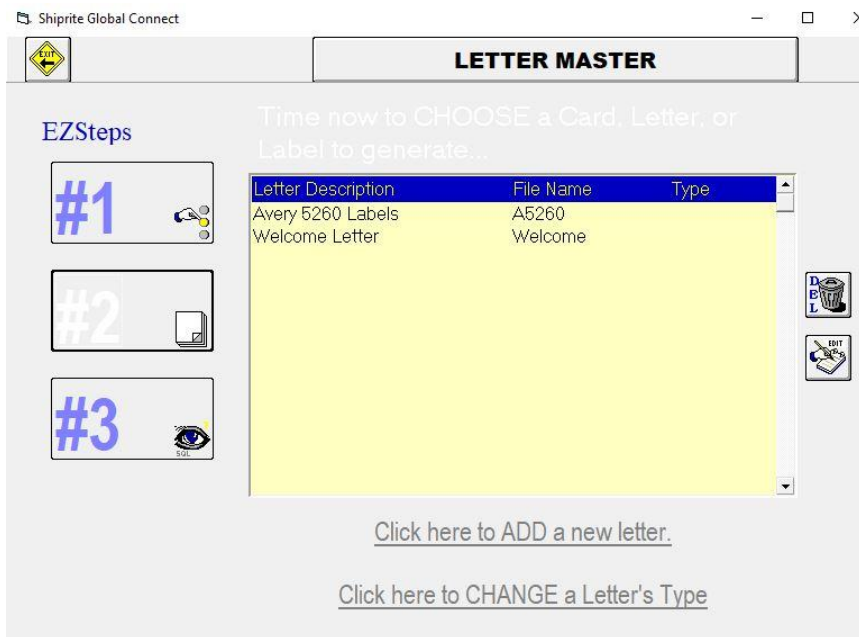
B. USE OF THE LETTERMASTER

This feature is used to print labels from your database, send letters to your customers, utilize your database to find out who your best customers are and help plan for the future. From the Main menu, go to the Actions pull down menu and select Letter Master.

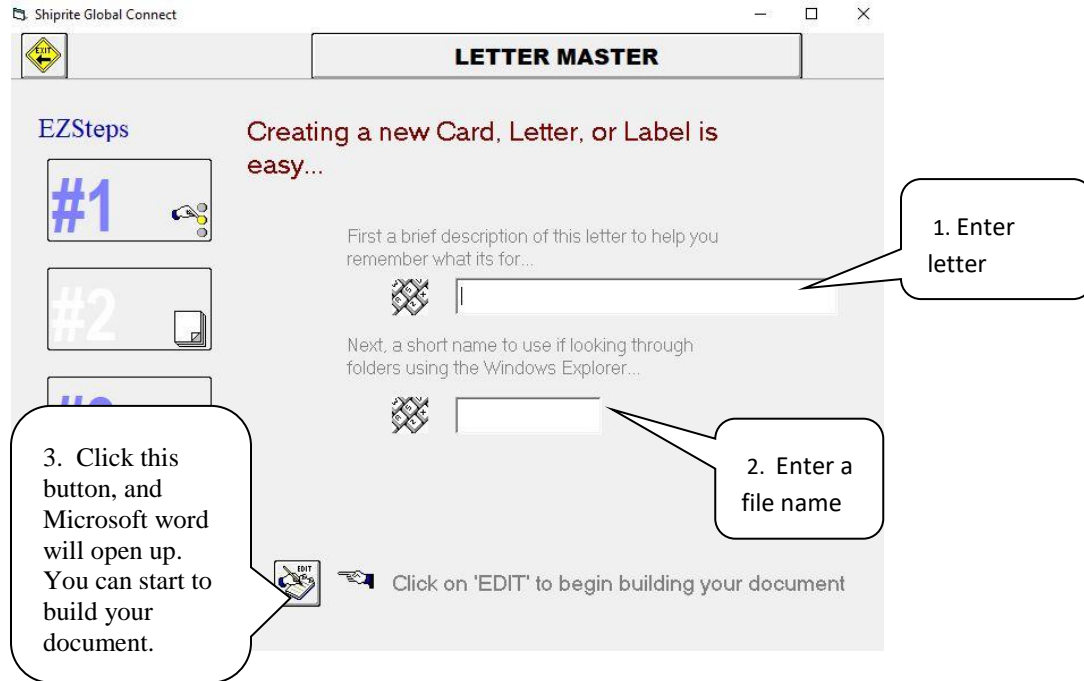
1. Choose the type of information category on the right side of Letter Master screen. For example, Contacts is being selected.



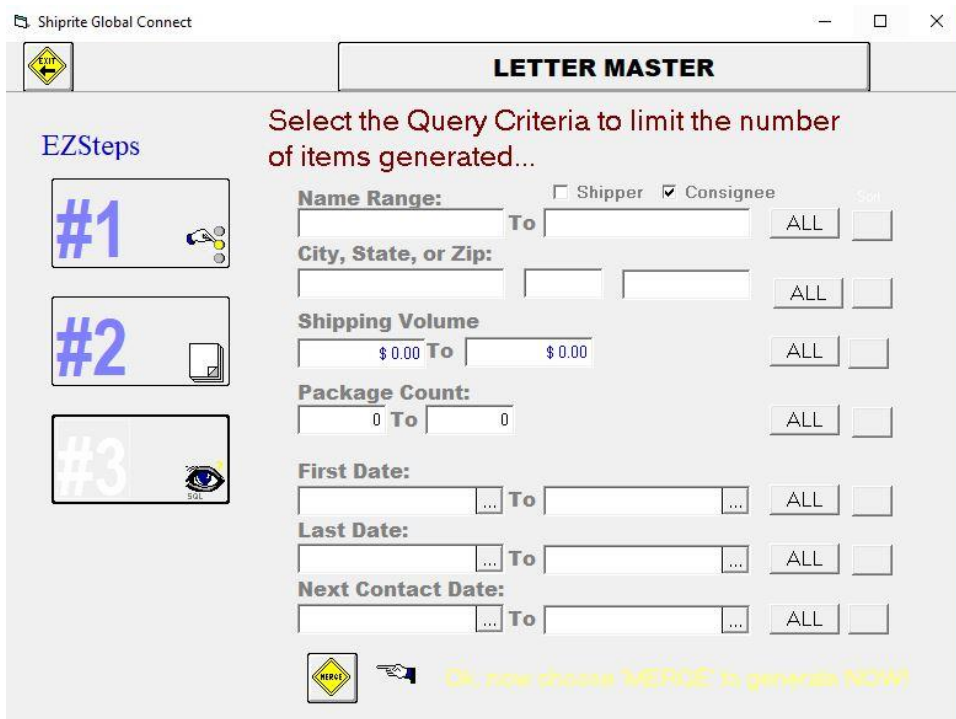
2. Click on #2 icon to open up a list of all files located in the letter master. Such as cards, letters and labels that you want to generate. For example, if you want to send out welcome letters to your new customers, you click on Welcome letter file. You can add new letters, change a letter's type, edit or delete a letter by click on the optional buttons in Letter Master view. These buttons are: Click here to ADD a new letter, Click here to CHANGE a Letter's Type, DEL and EDIT.



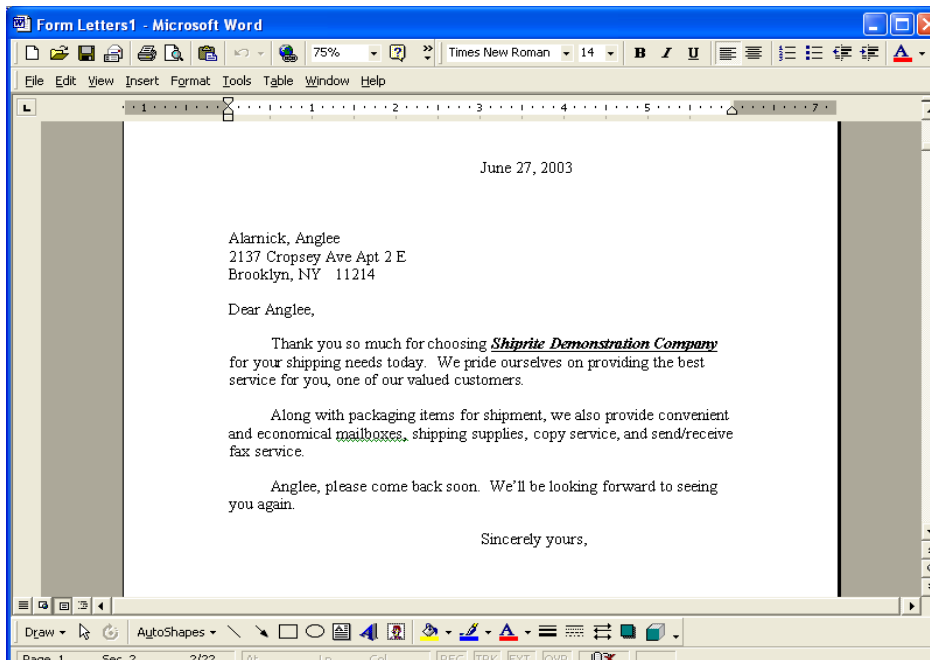
This is an example of adding a new letter to Letter Master: You can create a new letter to your liking by clearing the Letter Description and Letter Name text boxes, and then just type your own name and description in each field. As an example, you may wish to create a letter for customers who have over due payments. You may want to call it Collection Letter and give it a file name Deadbeat.doc, and click on MERGE icon to create the collection letter.



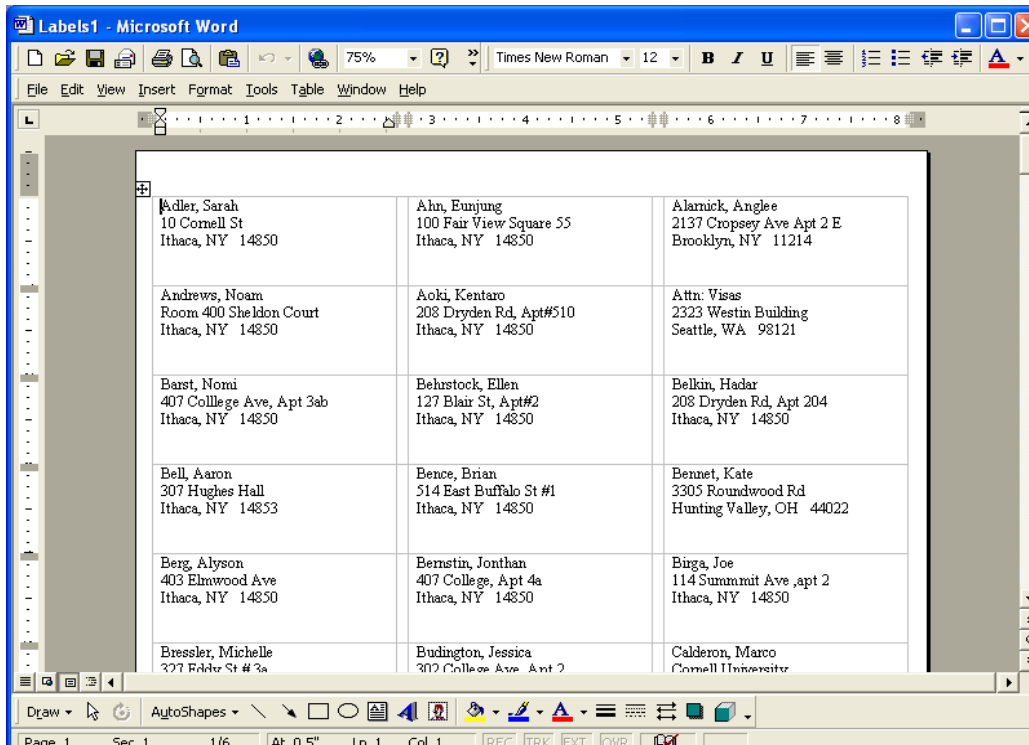
3. Check off and fill out contact category, ranges or dates that you would like to use. For example, you want to send out welcome letters to new shippers whose shipping volume is from \$20.00 to \$500.00. Check off the Shipper box and fill out the range \$20.00 to \$500.00 in the Shipping Volume box.



4. Click on the MERGE icon to launch Word and Merge the template with your database. You will see how the welcome letter is formatted.



This is an example of generating a set of AVERY Labels. You can use the Merge feature by selecting Avery Labels from the letter list box.

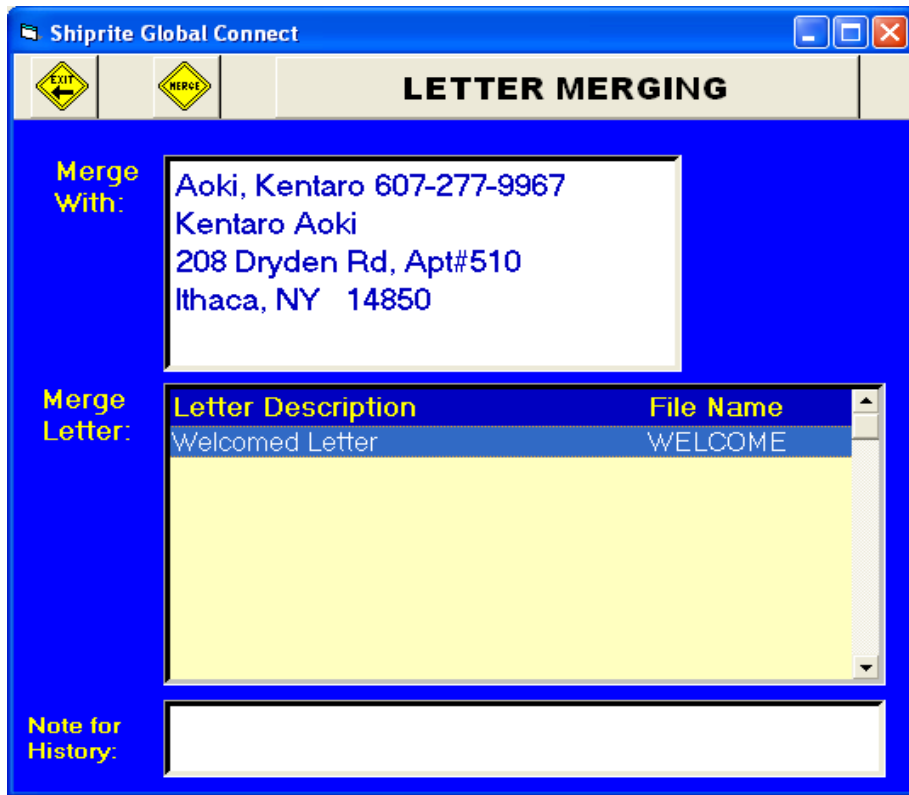


C. OTHER MERGE FUNCTIONS

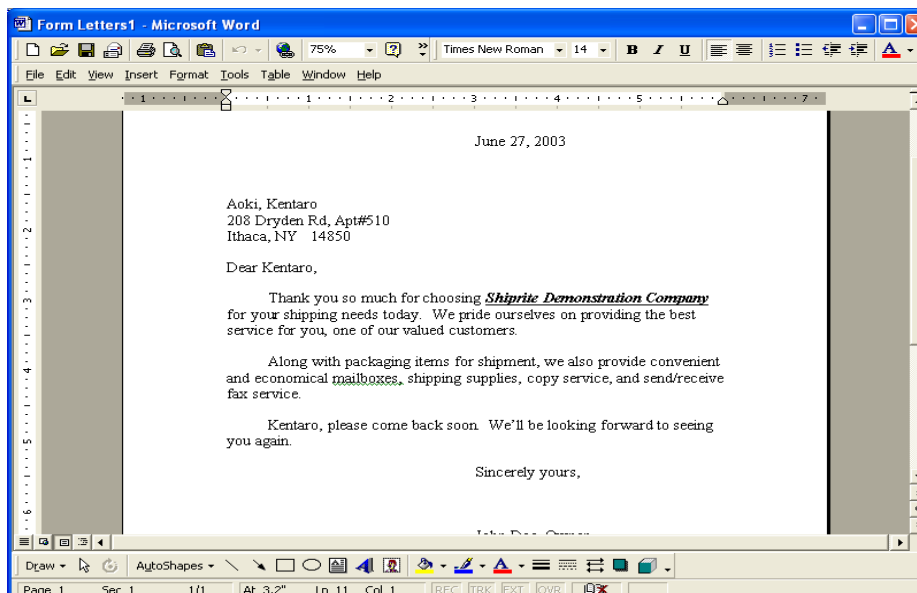
You can access the merge feature from loading a customer through the POS. From the POS screen, select Customer Look Up under Actions menu. That will take you to Name Search List; select a customer that you want to send a letter to. You will see her/his contact information in the bottom of POS screen. Right click on the contact information, and then select Cards, Letters and Labels, that will take you to Letter Master.



Select a letter file and then click on MERGE icon. For example, Welcome file is selected. Click on the MERGE icon:



You will see a welcome letter for a customer is launched with Word and Merge the template with your database.

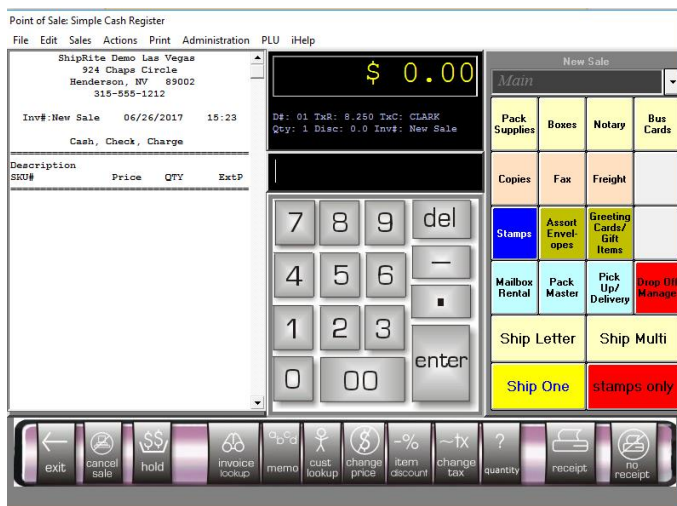


7. POINT OF SALE

A. SIMPLE POS SCREEN:

Below is your Simple POS screen when you first enter. If you get the Security Screen, you will need to input your user password. The default user passwords are “1” for Clerk with limited access and “222” for Admin with unlimited access.

You will now be in the Point Of Sale Screen. From this screen, you will do all of your selling, shipping and account management.



B. FUNCTION BUTTONS

There are ten functional buttons on the bottom of POS screen: (a)Exit, (b) Cancel Sale, (c) Transaction On Hold/Transaction Recovery , (d) Invoice Recall/Lookup (e) Save Memo Text to Receipt, (f) Customer Lookup, (g) Change Price, (h) Item Discounting, (i) Set Sale Tax Rate, (j) Set the Quantity Sold/Returned, (k) Receipt and (l) No receipt.

a. Exit: Exits the Point of Sale screen

b. Cancel Sale button: Click here to close out the current sale if you want to

abandon it or the customer backs out of the sale. The VOID/CANCEL security screen will open up by default.

c. Transaction On Hold: Put the current transaction on hold. You may recall any on hold transaction by clicking on this button when the POS is clear.

d. Invoice Recall/Lookup: This drops down a list of all your invoices sold in Date /time order, newest at the top. Just double click on any invoice you would like to recall.

e. Memo: In the SKU entry text box, you can put free text in the field and then click the Memo Button. It will appear on the receipt.

f. Customer Lookup: Click on this button, this will bring you to the Name search list. Enter the name in the Search List and press ENTER. Highlight the customer, and click the OK button.

g. Change Price: If you wish to override the price of a particular item, click here and enter the new price.

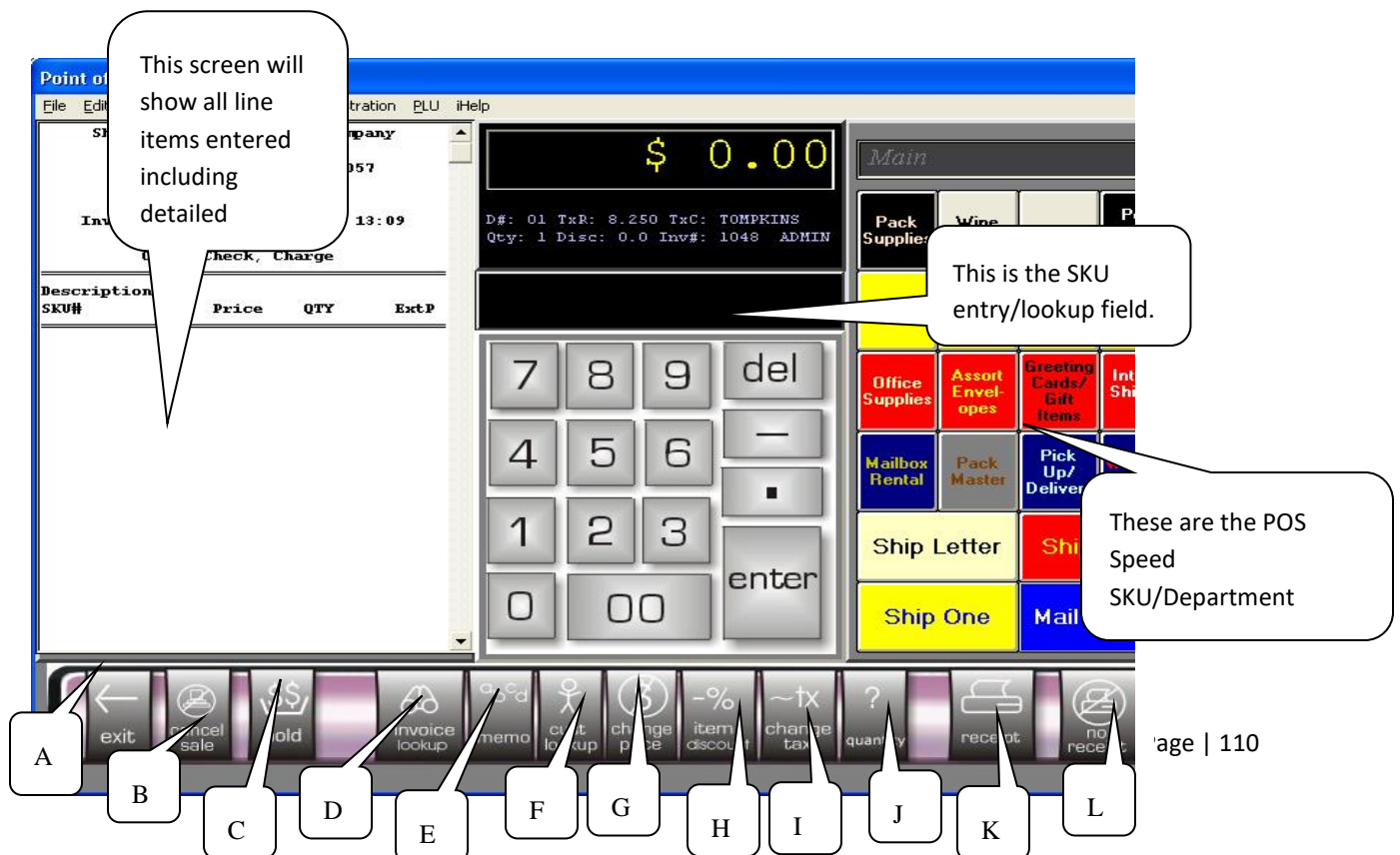
h. Item Discounting : Apply a discount on any SKU item. Enter the percentage of the discount for an item, click on % icon, and then enter an item's SKU number. You will see the price change.

i. Set Sales Tax Rate: Click here to override the sales tax rate paid by the customer. It is useful for Tax Exempts and those who pay partial tax.

j. Quantity : Enter the actual Quantity of items, then the QTY button, then the SKU or shortcut button of the item you are selling. For instance, to sell 33 copies: 33→click QTY button→click on COPY SELF SERV BUTTON. You will see the price of 33 copies pop up in POS screen.

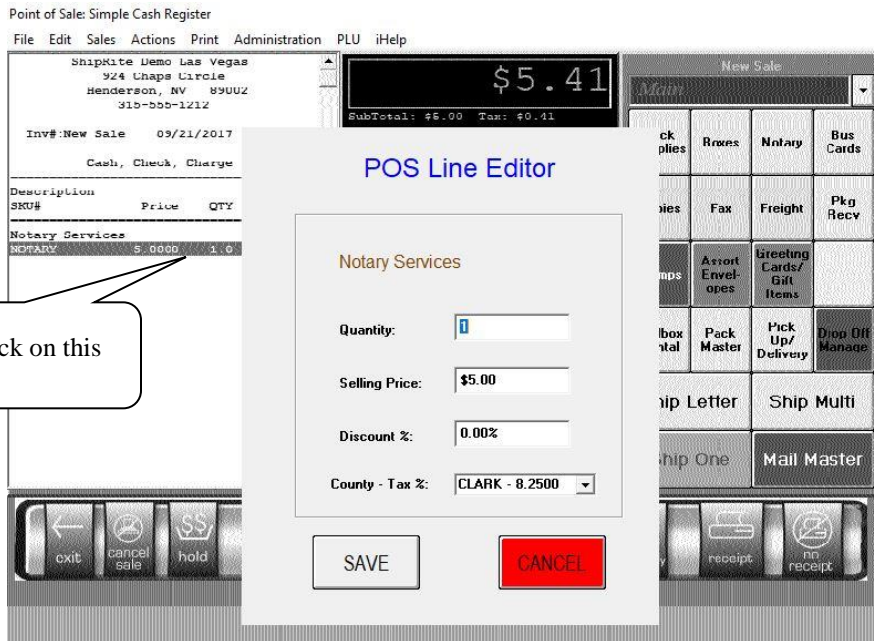
k. Receipt: Complete a sale with a receipt and puts you in the Payment Master to complete the sale.

l. No receipt: Complete a sale without a receipt will be printed.



C. POS LINE EDITOR

Any line item run up in the POS, whether it was by scanning the UPC code or by entering it with a Speed Button (see section D); that line can be edited with the POS Line Editor. Double clicking on the line item will bring up a new window where you can change the Quantity, the Selling Price, Apply a Discount, or change the Tax rate for that item only. Once the transaction is settled, the prices will revert back to their regular prices.



D. POS BUTTON MAKER (SPEED BUTTONS)

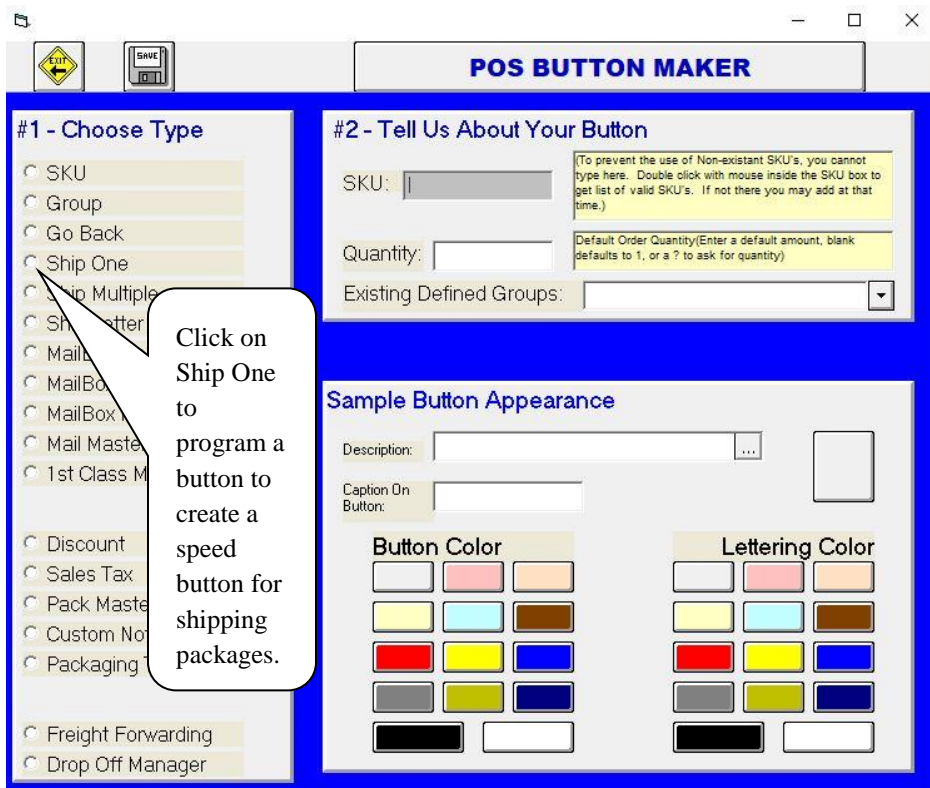
You will notice an array of buttons on the right side (4 across and 5 down). These are the programmable Speed SKU's. They will apply an inventory or non-inventory item with the single click of a mouse. From the figure below you will see that some buttons are pre-programmed. It is important to note that you can change, delete or edit these buttons according to personal preference. You should also note that these buttons are 3 Dimensional. That is, you can see the top panel of 20 buttons. This panel is called Main. What you cannot see is the unlimited stack of 20 button panels BEHIND the Main Panel. These are completely programmable by the user.

SKU: You can add a SKU item as long as it is already stored in inventory. To add an inventory SKU: Click on any empty button. After the screen opens up, press Enter in the SKU field. The drop down list of available SKU's will be displayed. Select your inventory item by double clicking. You can then complete as seen below. There is a lot of room in the POS Screen for more buttons to be programmed. Feel free to set the buttons up according to personal settings.

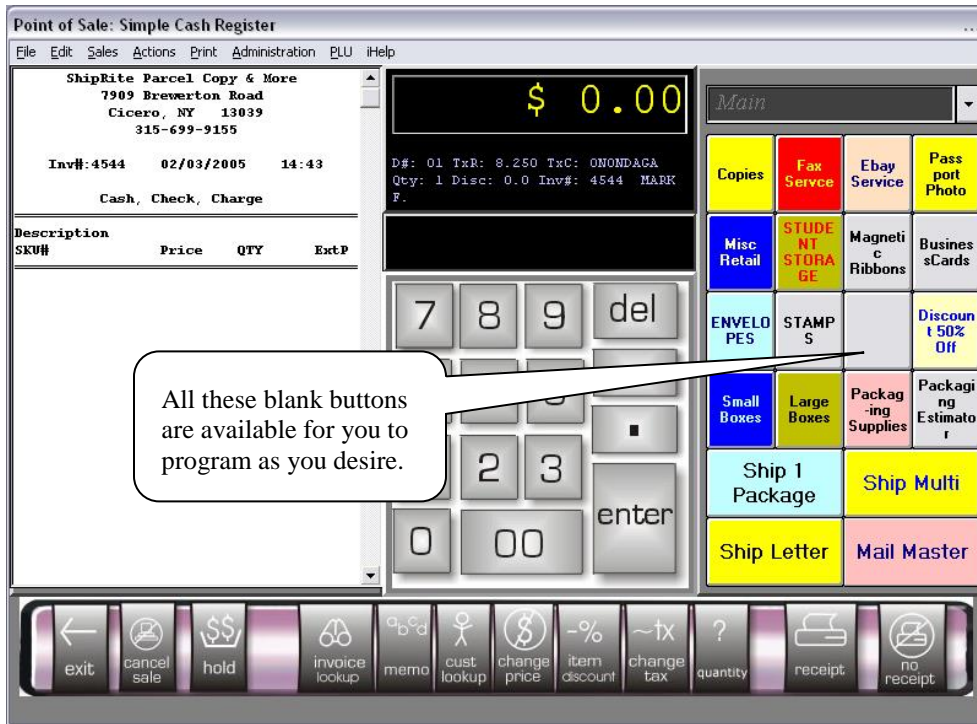
In this example below, a button is added that will result in the sale on one roll of tape with a cutter. Double click in the SKU field and a drop down list of the SKU will appear. If you know the SKU by heart,

you may just type the SKU in the text box and press ENTER. If there is no SKU for the item you wish, click the ADD button. The Inventory manager opens up. You may then add the item you need.

(TIP: You can create a 'Go Back' button on any panel to go back 1-level on the button panel. To do this, select 'Go Back' as your type for step #1 when in the button editor.)



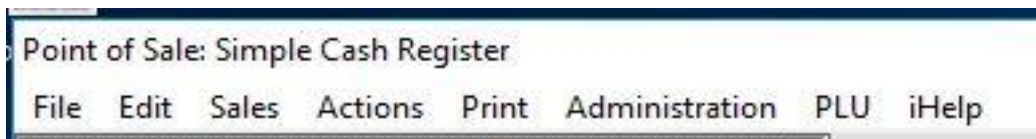
This Button Maker is three-dimensional. After you program a new group, an array of 20 buttons is created behind it. As a matter of convention, always leave the bottom right button as the GO BACK



button.

Try to keep the buttons grouped together generically, perhaps by department. We have included some of the buttons pre-programmed. It is important to note that you can add, delete or edit these default buttons to suit your needs.

E. POS PULL DOWN MENUS



1 FILE

CANCEL: This will exit out to the Main Menu

2 EDIT

Delete Row: Deletes the current row where the cursor is blinking.

3 SALES

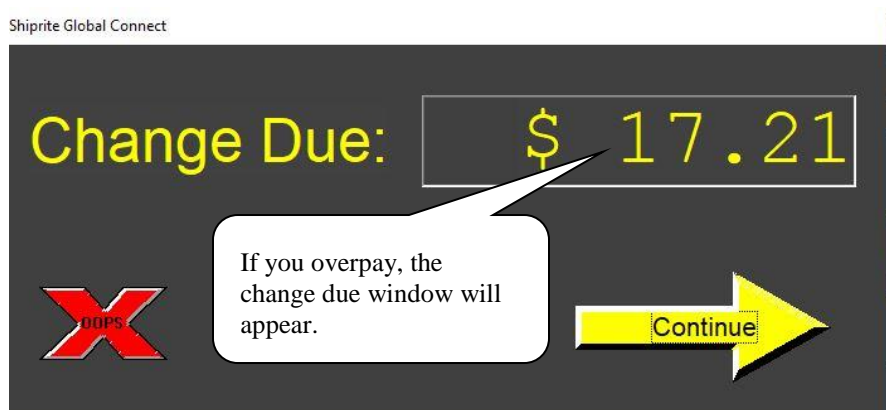
New Sale: Prepare for a new sale

Finish Sale with a Receipt (Payment Master): This will also REPRINT a receipt if a sale is RECALLED to the POS screen. When you select Sale With Receipt, the Payment Master form will open.

The screenshot shows the 'Payment Master' interface. On the left, a black box displays 'Total Sale: \$ 29.04'. Below this are input fields for 'Cash:', 'Check:', and 'Card:'. An 'Other' dropdown menu is also present. A 'Payments: \$ 0.00' field is shown with a red underline. Below that, 'Change: \$ 0.00' is displayed in red. At the bottom left, there is an 'Email Receipt:' field. In the center is a numeric keypad with buttons for digits 0-9, 'Del', and 'Enter'. To the right of the keypad is a grid of currency denomination buttons (1, 20, 50, 100) and 'Exact Cash' buttons. Below the keypad is a 'COMPLETE SALE or CHARGE to Acct' button. To the right of this are 'Debit Card' and 'Credit Card' buttons. At the bottom right, there are 'CANCEL SALE' and 'Apply Credit to Account' buttons. A 'Posting Date:' field shows '06/26/2017'.

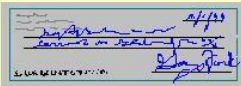
In the top left of this form, the total sale is displayed.

Below the Total on the left, are the amount-tendered spots. To pay by CASH, enter the amount tendered in the CASH text box. Then press the tab key or click the Complete Sale button. You may also click on the currency denomination on the right. If you overpay, the change due window will appear.



If the customer is a **charge account** and they overpay, you can apply the overpayment to their account. First click on the Apply Credit to Account button, then enter the amount tendered. You will not get the Change Due form. Apply Credit to Account is used only in conjunction with Customer Account Management, for charge accounts only.

Payment Master

Total Sale: \$ 27.06		<table border="1"> <tr><td>7</td><td>8</td><td>9</td></tr> <tr><td>4</td><td>5</td><td>6</td></tr> <tr><td>1</td><td>2</td><td>3</td></tr> <tr><td>0</td><td>00</td><td>.</td></tr> <tr><td>Del</td><td colspan="2">Enter</td></tr> </table>			7	8	9	4	5	6	1	2	3	0	00	.	Del	Enter		<table border="1"> <tr> <td>1 1</td><td>20 20</td> </tr> <tr> <td>2 2</td><td>50 50</td> </tr> <tr> <td>5 5</td><td>100 100</td> </tr> <tr> <td>10 10</td><td>Exact Cash</td> </tr> <tr> <td>10 10</td><td>Exact Cash</td> </tr> </table>		1 1	20 20	2 2	50 50	5 5	100 100	10 10	Exact Cash	10 10	Exact Cash
7	8	9																													
4	5	6																													
1	2	3																													
0	00	.																													
Del	Enter																														
1 1	20 20																														
2 2	50 50																														
5 5	100 100																														
10 10	Exact Cash																														
10 10	Exact Cash																														
Cash: <input type="text"/> Check: <input type="text" value="27.06"/> Card: <input type="text"/>		<div style="border: 1px solid gray; padding: 5px; text-align: center;">  <input type="button" value="Debit Card"/> <input type="button" value="Credit Card"/> </div>																													
Other: <input type="text"/>																															
Payments: <input type="text" value="\$ 0.00"/>		<input type="button" value="COMPLETE SALE or CHARGE to Acct"/>																													
Change: <input type="text" value="(\$ 27.06)"/>		<input type="button" value="CANCEL SALE"/>																													
Email Receipt: <input type="text"/>		Posting Date: <input type="text" value="08/28/2017"/>																													
		<input type="button" value="Apply Credit to Account"/>																													

To pay by check, either enter the amount of the check on the left in the Check Text Box or click on the Check Icon on the right. Fill out check number, bank name and state of bank in the available text boxes, and then save it. Filling in these forms helps with the reconciliation of the Z-Report and the CLOSE DRAWER procedure at the end of the day.

Shiprite Global Connect

  **CHECKS**

Name on Check:

Check Number:

Bank Name:

State of Bank:

*To pay by credit card when using a credit card processing company that is **not** integrated with ShipRite, enter the amount of the credit card sale in the Credit Card Text box on the left, or click on the Credit Card Icon on the right. Fill out Name on card, card number, and expiration date and authorization number in the available text boxes.*

  **Lynk NOT Enabled**

Name on Card:

Card Number:

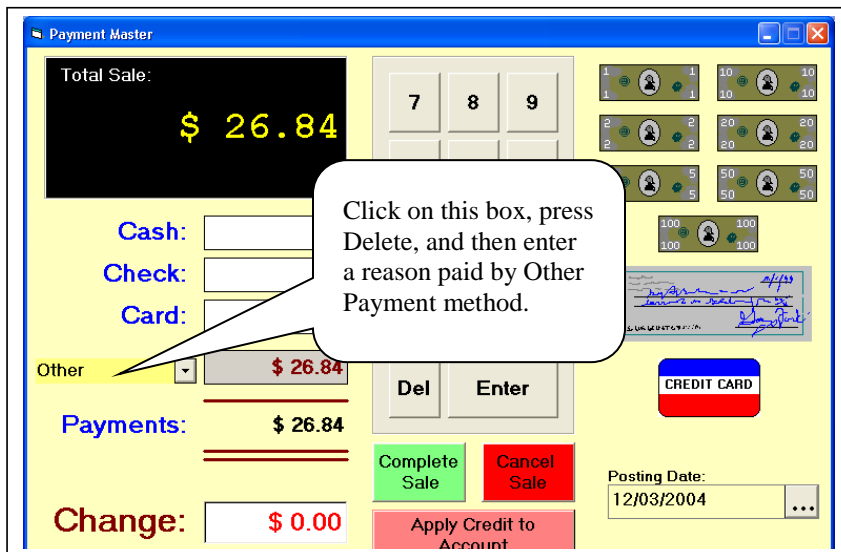
Expiration Date: **Charge Amount:** **\$ 27.06**

CVV2 Number: Required Ignore

To pay by credit card when using the Smart Swiper integration with ShipRite, enter the amount of the credit card sale in the Credit Card Text box on the left, or click on the Credit Card Icon on the right. This screen will come up and will prompt the customer to swipe or enter their chip enabled card:



Other Payments can be made. This is for barter, script, company business or whenever you do a sale and you do not collect any form of payment. You enter the amount tendered in the Other Text Box., press ENTER, and then type your REASON with as few characters as possible. Example, your store ships a computer back for repair. In the screen above, you enter 2684ENTER, then type COMPANY BIZ over the word Other.



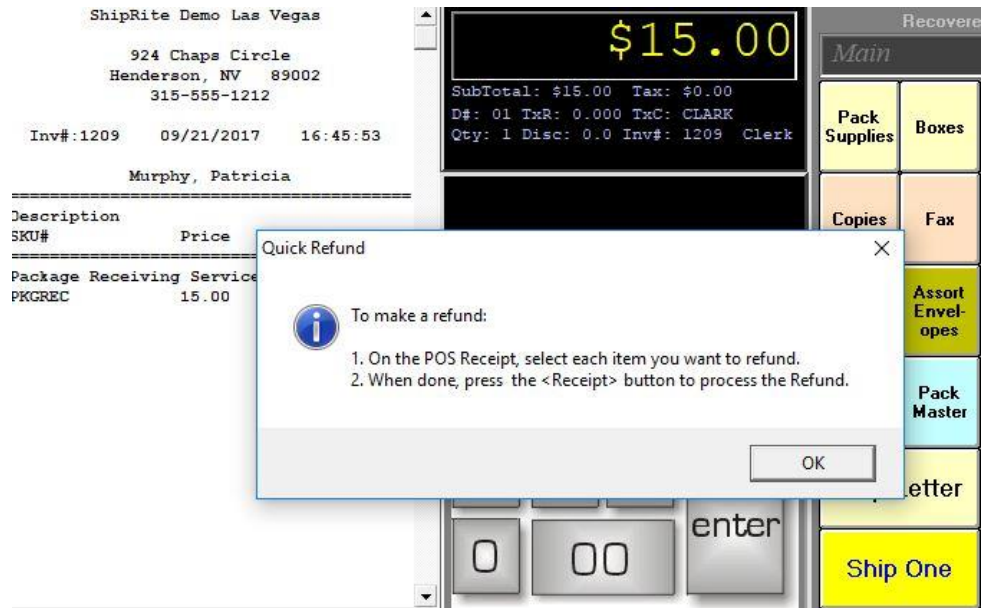
Function Buttons of Payment Master:

- **Apply credit to account:** used only in conjunction with Customer Account Management, for charge accounts only.
- **Green Complete Salar:** completes the payment

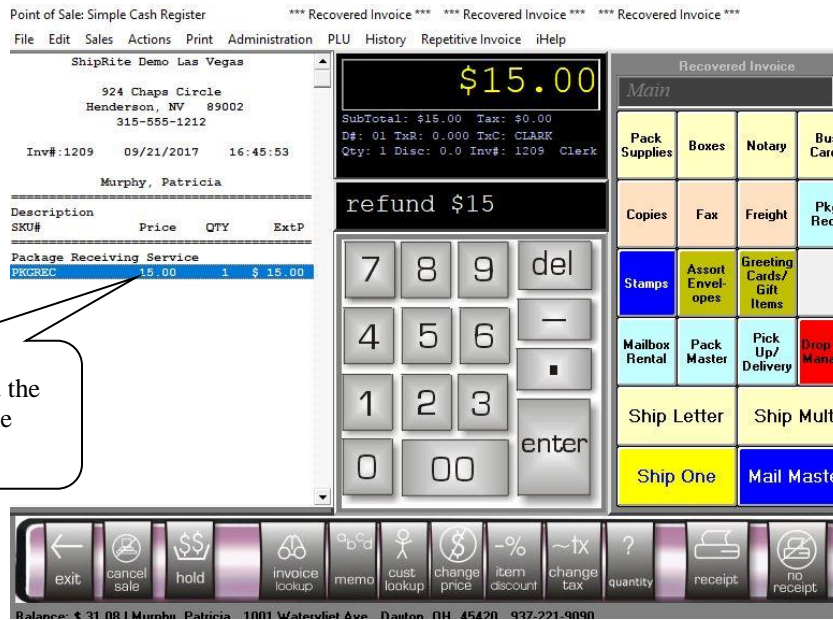
- **Red Cancel Sale:** Cancel Payment and go back to POS. Sale remains unpaid.

Finish Sale W/O Receipt: Complete a payment w/o a receipt. Be aware that this will print a small strip from your receipt printer for the purpose of kicking the cash drawer. You will get the same Payment Master seen above.

Quick Refund (Ctrl+D): Allows you to refund one or more line items. Pull up the Invoice, Click on Quick Refund from the Sales pulldown menu. The following instruction window will pop up.

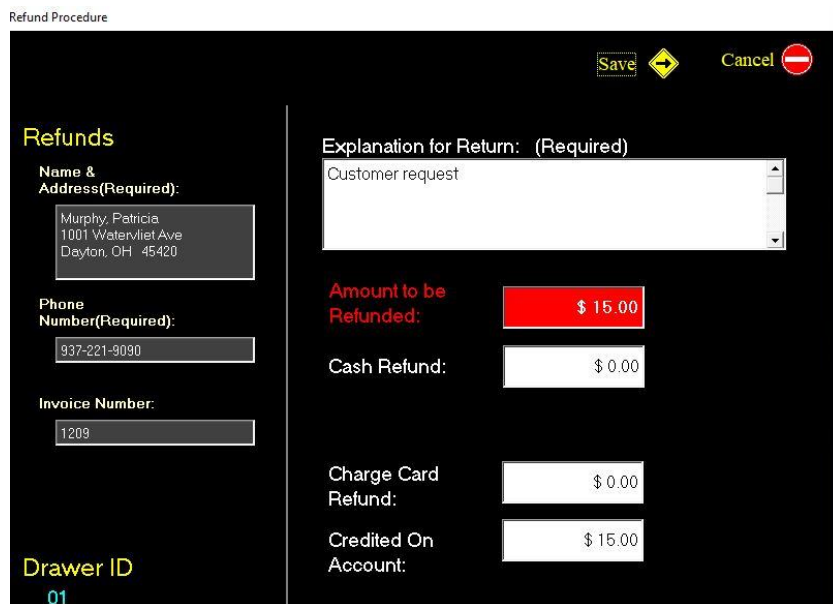


Click on the line item(s) you wish to Refund and the POS will show the amount of the refund in the black box:



Click on this line and the screen will display the amount of the refund

Click on Receipt and the following screen will be displayed. This is where you indicate how you want to refund. Enter an explanation as to why the refund was made. ShipRite will refund it back to the same payment method that was originally tendered. You can change it to another method if you prefer. Click SAVE to continue. REMEMBER: Use REFUND when payment was collected on the original invoice. The refund will deduct that amount from the cash drawer, or the customer's credit card, or customer's account.



Void Sale: This is used when you create an invoice by mistake and NO PAYMENT WAS TAKEN. It makes it so that the transaction never happened. Using the Void function

when payment was collected will result in the drawer being out of balance. Voiding requires Admin approval.

VOID/CANCEL TRANSACTIONS

Invoice #: 1211 Original Clerk: Clerk
Date of Sale: 09/21/2017 Voiding Clerk:
Today's Date: 09-21-2017 Approved By:
Total: \$ 10.83

Reason for this action:

- Training
- Customer Changed Mind
- Clerk Error
- Testing
- Other

No Sale: This is a utility to pop the cash drawer open. You may also press <CTL> N. If POS security is enabled, the No Sale will be credited to the clerk who was logged in at the time.

View Payment History on Invoice: This will show all the payments applied to a particular invoice. Go to Invoice Look up, then click on View Payment History on Invoice in the Sales dropdown menu . Beneficial when the payment was split between 2 different payment methods

INVOICE HISTORY #1153

DATE	MEMO	CHG/PMT	BALANCE
08/23/2017	Sales	\$ 177.01	\$ 177.01
08/23/2017	CC Pay#: wipe	-\$ 177.01	\$ 0.00

OK

4 ACTIONS

From Actions menu, it will take you to the following screens

Customer Lookup: It will open up the Name Search List that you can get into customers' accounts.

Invoice Lookup (F3): You can recall an invoice from here.

Repetitive Invoices: Gives you a list of all customers with Repetitive Invoices scheduled.

Ship One Package (F8): You can ship one package or letter in Ship Master screen.

Ship Letter (F9): Ship Master will open up that you can ship a letter from here.

Ship Multiple Packages (F11): Ship Master will open up; you can ship one or many packages.

5 PRINT (REPORTS)

You have several reports you may generate: Production Reports, Sales Reporting, A/R Aging Reports and Z-Reports. These are available from the drop down menu. They are all created in Crystal Reports

Production Reports (Inventory Reports): This shows a By Dept and Item listing of your inventory. Last page will show you your pricing Margin and total value of your inventory. You may print this report by Department, Customer Account or by Sales Clerk.

All reports printed in ShipRite will default to the current day. If you desire to change the dates, you may do as shown below. Select the Date by CLICKING once on the desired start date from the calendar, and then click into the Starting Date text box. Repeat for the Ending Date.

The screenshot shows a window titled "Report Dates". On the left, there are two text boxes: "Starting Date:" containing "08/28/2017" and "Ending Date:" containing "08/28/2017". Below these are two buttons: a pink "Print" button and a red "Cancel" button. On the right is a calendar for August 2017. The calendar has columns for Sun, Mon, Tue, Wed, Thu, Fri, and Sat. The 28th is highlighted in blue. The days 1 through 5 are in the first row, 6 through 12 in the second, 13 through 19 in the third, 20 through 26 in the fourth, and 27 through 31 in the fifth.

The report feature will always give you the option of Preview. If you answer yes, the screen below will appear. If NO, the report will immediately print to your page printer.

1 of 2 100% Total:45 100% 45 of 135

Production Report

by Sales Department

Ship with Demo

1

2

3

4

FAX

	QTY	Price	Ext Price	Avg Price	COGS
FXCON Fax Connection Charge	40.00	\$ 0.50	\$ 20.00	\$ 0.50	\$ 5.25
FXCON_INTL Fax Connection Charge INT	20.00	\$ 2.00	\$ 40.00	\$ 2.00	\$ 11.00
<i>Total for Department: FAX</i>			\$ 60.00		\$ 16.25

METER

	QTY	Price	Ext Price	Avg Price	COGS
CERT Certified Mail	8.00	\$ 3.50	\$ 28.00	\$ 3.50	\$ 11.20
COD50 COD up to \$50	1.00	\$ 6.00	\$ 6.00	\$ 6.00	\$ 4.00
EXPL Express Mail Letter Rate	2.00	\$ 18.00	\$ 36.00	\$ 18.00	\$ 24.50
M1 1st Class, 1oz	1.00	\$ 0.40	\$ 0.40	\$ 0.40	\$ 0.34
M2 1st Class, 2oz	3.00	\$ 0.85	\$ 2.55	\$ 0.85	\$ 1.71
M3 1st Class, 3oz	1.00	\$ 1.35	\$ 1.35	\$ 1.35	\$ 0.80
PR12 USPS PRIORITY 2 LBS	1.00	\$ 5.50	\$ 5.50	\$ 5.50	\$ 3.95
RTNRCT Return Receipt Requested	8.00	\$ 2.25	\$ 18.00	\$ 2.25	\$ 10.00
<i>Total for Department: METER</i>			\$ 97.80		\$ 56.50

RETAIL

	QTY	Price	Ext Price	Avg Price	COGS
1 Mailer, JiffyLite #1	21.00	\$ 0.89	\$ 18.69	\$ 0.89	\$ 0.29
BC BUSINESS CARDS	10.00	\$ 1.00	\$ 10.00	\$ 1.00	\$ 5.00
BURBREW BURBREW WRAPS	2.00	\$ 2.00	\$ 4.00	\$ 2.00	\$ 0.50

Production Report PREVIEW....

In the above report, you will get a by department and item listing of how you performed for a fixed period of time. It will show you how many sold, revenue, income and your simple margin.

1. Scroll Arrows: Pages you thru the report
2. Print: After viewing, you may print the report
3. Zoom Control: Zoom in and out on the report
4. X out: Closes out the current view.

SALE REPORTING: This is your Sales Report for a set period of time (default is the current day). This shows sales data, as well as gross margin and net income. You can print out the reports by Sales Journals, Sales Inquires, Sales Tax Report, Hourly Sale Ticket and Hourly Analysis for a Week.

- **Sales Journals:** You may view this report by Date Invoice, or by Customer Account as shown, or Sales Clerk.

Sales Journal Shiprite Demonstration
By Customer Account

1001 - Acer America Corp (rnr)

0133083	07/03/2003	10:17	Clerk	QTY	Unit Price	Disc	Ex
USPS-LPECON			Int Ltr Post Economy	1.00	\$ 13.97		
CERT			Certified Mail	1.00	\$ 3.50		
RTNRCT			Return Receipt Requested	1.00	\$ 2.25		
USPS-LPAIR			Int Ltr Post Air	1.00	\$ 1.68		
Sub-Total:							
Sales Tax:							
Invoice Total:							

Total for Account 1001

135 - Alarnick, Anglee

0133067	06/30/2003	10:37	Clerk	QTY	Unit Price	Disc	Ex
#10			#10 Business Envelopes	20.00	\$ 0.05		
BX121224			BOX 24X12X12	2.00	\$ 3.50		
BC			BUSINESS CARDS	20.00	\$ 1.00		
SHARPIE			SHARPIE MARKER PEN	5.00	\$ 0.99		
GDS			Airborne Ground Service	1.00	\$ 12.62		

- **Sales Inquires:**
- **Sales Tax Report:** This report simply shows Total Revenue for the period, Sales Tax Collected and net revenue.

- **Hourly Sales Ticket:** This is a printout on your receipt printer that gives a breakdown of the \$ amount and %percentage of business during the current day by hour.
- **Hourly Analysis For A Week:** This report is by DAY OF THE WEEK, and HOUR OF THE DAY. It will show how much business conducted during each hour and the percent of your total revenue for the week. It is useful for planning purposes.

ACCOUNT RECEIVABLES AGING: This is an accounts receivables aging report with a breakdown of 30,60,90 days, etc.

Z-REPORTS: This is your sales summary, collection summary and payment summary for a fixed period of time. The default time period is the current day. In the example below, the report is generated for one week. Below is part one, the Production Summary.

All your departments are summarized. In each department heading is a summary of EACH item sold in the report period. This report is very useful for you to scan down the Margin column on the right and see if you have any pricing problems. This report should be used at the end of the day to close.

Z - REPORT

***** For the Period: 06/01/2017 - 08/28/2017 *****

Z-Report

Ship Rite Demo Las Vegas 924 Chaps Circle Henderson, NV 89002

Print Date: 08/28/2017 Print Time: 20:40:46

Production Summary

Department	Sales	COGS	Income by SKU	Margin %
<i>Income Departments</i>				
COPIES	\$ 7.00	6.15	\$ 0.85	12.14
DHL	\$ 0.08	0.03	\$ 0.05	62.50
FEDEX	\$ 121.34	82.81	\$ 38.53	31.75
MAILBOX	\$ 625.54	309.85	\$ 315.69	50.47
RETAIL	\$ 89.00	0.00	\$ 89.00	100.00
USPS	\$ 8.04	3.48	\$ 4.56	56.72
	\$ 119.60	99.19	\$ 20.41	17.07
	\$ 970.60	502	\$ 469.09	

Z - REPORT

***** For the Period: 06/01/2017 - 08/28/2017 *****

Z-Report

ShipRite Demo Las Vegas: 924 Chap: Circle Henderson, NV 89002

Print Date: 08/28/2017 Print Time: 20:42:36

Production Results

<u>Total Sales</u>	<u>Cost of Goods</u>	<u>Sales Income</u>	<u>Margin</u>
\$971	\$502	\$469	48.33 %

Collections Summary

<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;">Sales:</td> <td style="width: 15%; text-align: right;">971</td> <td style="width: 15%;"></td> <td style="width: 15%;"></td> </tr> <tr> <td>(returns):</td> <td style="text-align: right;">-</td> <td style="border-top: 1px solid black;"></td> <td></td> </tr> <tr> <td>Net Sales:</td> <td style="text-align: right;">\$ 970.60</td> <td></td> <td></td> </tr> <tr> <td colspan="4"> </td> </tr> <tr> <td>+ Tax:</td> <td style="text-align: right;">1</td> <td style="border-top: 1px solid black;"></td> <td></td> </tr> <tr> <td colspan="4"> </td> </tr> <tr> <td>Total:</td> <td style="text-align: right;">\$ 971.27</td> <td style="border-top: 1px solid black; border-bottom: 3px double black;"></td> <td></td> </tr> </table>	Sales:	971			(returns):	-			Net Sales:	\$ 970.60							+ Tax:	1							Total:	\$ 971.27			<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;">Cash Count:</td> <td style="width: 15%; text-align: right;">\$ 619.20</td> <td style="width: 15%;"></td> <td style="width: 15%;"></td> </tr> <tr> <td>Over/Short:</td> <td style="text-align: right;">0</td> <td></td> <td></td> </tr> <tr> <td>(paid out):</td> <td style="text-align: right;">0</td> <td style="border-top: 1px solid black;"></td> <td></td> </tr> <tr> <td>Cash Expected:</td> <td style="text-align: right;">619</td> <td></td> <td></td> </tr> <tr> <td colspan="4"> </td> </tr> <tr> <td>Check:</td> <td style="text-align: right;">0.00</td> <td></td> <td></td> </tr> <tr> <td>Charge:</td> <td style="text-align: right;">242.89</td> <td></td> <td></td> </tr> <tr> <td>+ Other:</td> <td style="text-align: right;">21</td> <td style="border-top: 1px solid black;"></td> <td></td> </tr> <tr> <td>Sub-Total:</td> <td style="text-align: right;">\$ 883.23</td> <td style="border-top: 1px solid black; border-bottom: 1px solid black;"></td> <td></td> </tr> <tr> <td>+/- Changes in A/R:</td> <td style="text-align: right;">88</td> <td style="border-top: 1px solid black;"></td> <td></td> </tr> <tr> <td>Total:</td> <td style="text-align: right;">\$ 971.27</td> <td style="border-top: 1px solid black; border-bottom: 3px double black;"></td> <td></td> </tr> </table>	Cash Count:	\$ 619.20			Over/Short:	0			(paid out):	0			Cash Expected:	619							Check:	0.00			Charge:	242.89			+ Other:	21			Sub-Total:	\$ 883.23			+/- Changes in A/R:	88			Total:	\$ 971.27		
Sales:	971																																																																								
(returns):	-																																																																								
Net Sales:	\$ 970.60																																																																								
+ Tax:	1																																																																								
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Cash Count:	\$ 619.20																																																																								
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Check:	0.00																																																																								
Charge:	242.89																																																																								
+ Other:	21																																																																								
Sub-Total:	\$ 883.23																																																																								
+/- Changes in A/R:	88																																																																								
Total:	\$ 971.27																																																																								

This is the collection summary on the Z-Report.

VOID/CANCEL REPORTS: The purpose of this report is to show who has voided sales for the defined period of time. This report includes the name of the voiding clerk, and the reason for the void.

Void/Cancel Report

ShipRite Demo Las Vegas
 924 Chaps Circle
 Henderson, NV 89002

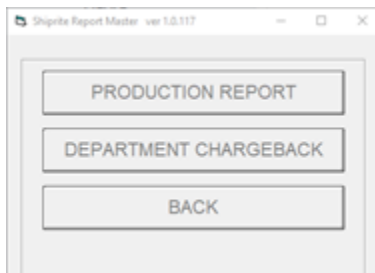
<u>InvNum</u>	<u>TotalSale</u>	<u>Date</u>	<u>OriginalDate</u>	<u>OriginalClerk</u>	<u>VoidingClerk</u>	<u>AuthorizingClerk</u>	<u>Reason</u>
1149	43	08/22/2017	08/22/2017	ADMIN	ADMIN	ADMIN	Training -
New Sale	3	08/22/2017	08/22/2017	THERESA	ADMIN	ADMIN	Training -
New Sale	53	08/22/2017	08/22/2017	THERESA	ADMIN	ADMIN	Training -

Statements: This is used to bill your monthly customers. There is a summary of the purchase statement’s period, statement date and due date.

UNIVERSITY CHARGEBACK REPORTS

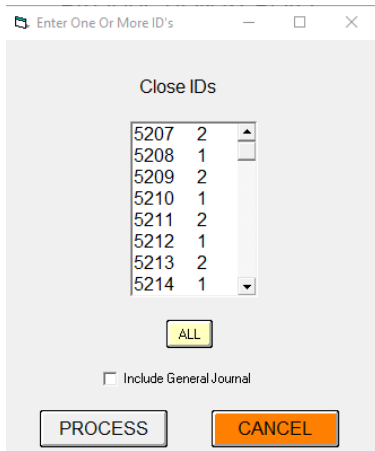
This is a special report created for colleges and universities that have a specific need for a chargeback report.

The chargeback report displays all sales transactions that are charged to an account in a single table that is exportable to excel. The report is broken down by individual sale and SKU.



To generate the report, please run the Reports.exe file that is located in your C:\shiprite folder. This will open the ShipRite Report Master. Click on the “Production” option, then select “Department Chargeback”.

In the next screen, select the desired date range.



Once the date range is selected, all available CloseID's will be listed. Each close ID represents a drawer closing.

At this point the report can be run for specific closings by either selecting the individual closeID's needed, or clicking the "All" button to select all of them.

The report can also be run without selecting any closeID's by simply pressing the "Process" button. This will generate the report using strictly the previously selected date range as selection criteria.

To Export Report to Excel

When asked to preview the report, select YES. In the preview screen press the export button on the top menu.

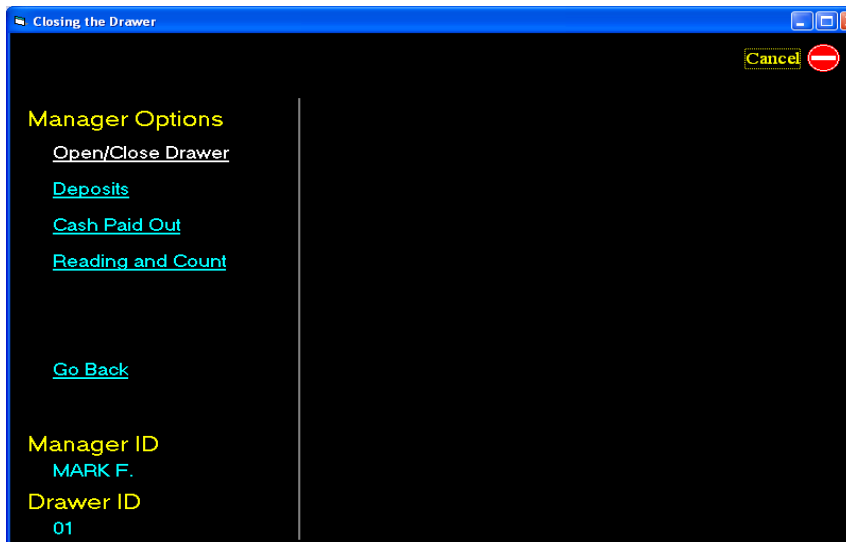


In the Export menu, select the "Excel 8.0 (XLS)" option and press OK.

A file folder selection dialog box will display. Select the location to save the report to and press "Save". The report will now be saved in excel format at the selected location.

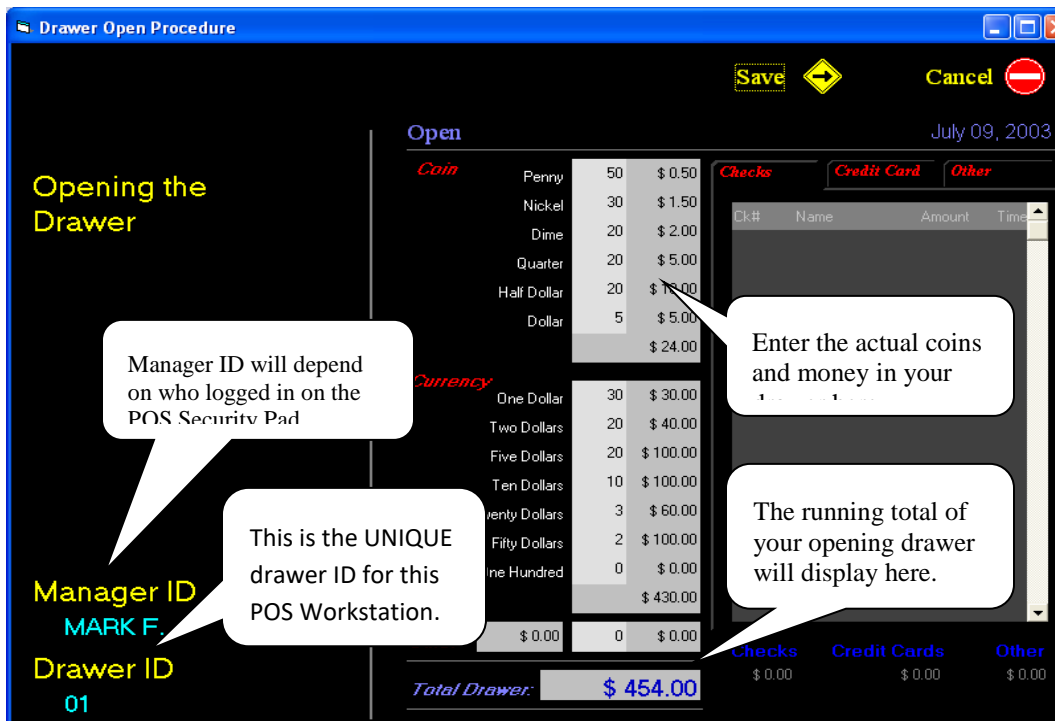
6 ADMINISTRATION: OPEN/ CLOSE DRAWER /DEPOSIT

POS Manager: Perform duties associated with the OPENING and CLOSING of the cash drawer for accounting purposes. In order to use this feature, you MUST have a drawer ID defined: Go to [POS SETUP \(Chapter 2\)](#)



A) Drawer Open:

When you first open POS, the Drawer Open Procedure will open:



Just click on the word to add the equivalent of a roll of coins, or a bundle of bills.

When you have ROLLS of coins, just click on the WORD "Penny" and 50 cents will be added to the Amount.

Example if you had 67 pennies and 2 rolls, you would put 67 in the Coin Spot, then click twice on the

Click once on the running total column to add ONE coin or ONE bill to the drawer

Penny	50	\$ 0.50	
Nickel	30	\$ 1.50	
One Dollar	20	\$ 2.00	
Quarter	20	\$ 5.00	
Half Dollar	20	\$ 10.00	
Dollar	5	\$ 5.00	
		\$ 24.00	
One Dollar	30	\$ 30.00	
Two Dollars	20	\$ 40.00	
Five Dollars	20	\$ 100.00	
Ten Dollars	10	\$ 100.00	
Twenty Dollars	3	\$ 60.00	
Fifty Dollars	2	\$ 100.00	
One Hundred	0	\$ 0.00	
		\$ 430.00	
	\$ 0.00	0	\$ 0.00
Drawer:		\$ 454.00	

When finished, save your work, and then the Cash Drawer OPEN slip will print out on your receipt printer or you may preview it to your screen, and then print it. Close the report window when done. You will then end up in POS.

Now you will just transact business like usual.

Shiprite Demonstration Company
 Opening Drawer
 by MARK F.

Wednesday, July 09, 2003 13:15

Coin

Pennies	0.50
Nickels	1.50
Dimes	2.00
Quarters	5.00
Half Dollars	10.00
Silver Dollars	5.00
<i>Total of Coins</i>	\$24.00

Currency

Dollars	30.00
Tw ins	40.00

Other \$0.00

**Total
 Drawer** \$454.00

*** OPEN***

*** OPEN***

*** OPEN***

Clerk Signature:

B) Drawer Close:

To Close the drawer at the end of the day, or the end of the employee's shift: Go to POS: ADMINISTRATION: POS Manager. Click on the Index Link Open/Close Drawer. Always count your cash and coins first. Enter the coins and cash in the appropriate spot. If the total is correct, the Expected Cash amount will highlight in yellow. The same true for Checks, Charge Cards and Other Payment. For Checks, Charge Credits and Other Payment methods, click on each Tab and select each item by clicking on it, a running total will add up. After you are done entering all the amount of cash in the drawer, and selecting the Checks, Charges and Other, you should get this message "Drawer is in BALANCE". If it is not, you will have to circle back to find out where the error is. After you click SAVE, select PREVIEW and the closing Z Report will print. If the drawer is in balance, the slip will inform you. Staple your opening report and your Closing Z Report together. DO NOT PRINT or USE the datewise Z Report. That is being phased out.

Closing the Drawer

Save Cancel

Closing the Drawer

Expected Cash \$536.10

Drawer is in BALANCE

July 10, 2003

Coin			Checks			Credit Card			Other		
	Count	Amount	Check #	Name	Amount	Time					
Penny	30	\$ 0.30	2136	Altera Corp/ C	165.60	13:33					
Nickel	22	\$ 1.10									
Dime	2	\$ 0.20									
Quarter	2	\$ 0.50									
Half Dollar	2	\$ 1.00									
Dollar	3	\$ 3.00									
		\$ 6.10									
Currency											
One Dollar	4	\$ 4.00									
Two Dollars	8	\$ 16.00									
Five Dollars	12	\$ 60.00									
Ten Dollars	3	\$ 30.00									
Twenty Dollars	1	\$ 20.00									
Fifty Dollars	4	\$ 200.00									
One Hundred	2	\$ 200.00									
		\$ 530.00									
Other	0	\$ 0.00									
Total Drawer:		\$ 776.82									
			Checks	Credit Cards	Other						
			\$ 165.60	\$ 55.01	\$ 20.11						

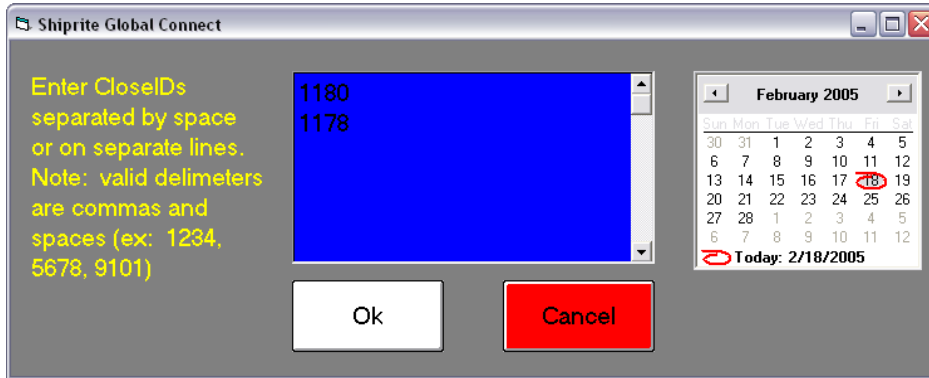
01

This is the total fund in your drawer, Cash, Checks and Credit cards. Remember, this includes the \$454 beginning balance of your drawer.

Running total as you click on each

FOR NETWORK USERS: If you are a network user AND each workstation has its own unique Drawer ID#, then follow this procedure AFTER closing each drawer...

On the server, go to POS. Then click on PRINT: CONSOLIDATED Z REPORT.

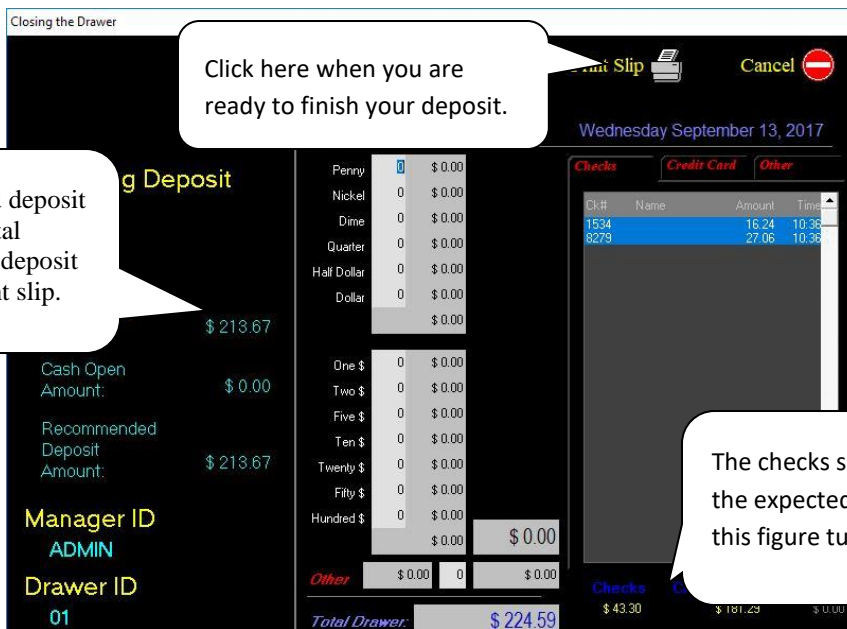


Click on the day you are closing, then select the DRAWER ID's that will comprise your close.

You will now get a composite Z Report that includes all the drawer closings for that drawer. Go ahead and print that. Staple the DRAWER closing Z Reports to the back of the CONSOLIDATED Z Reports.

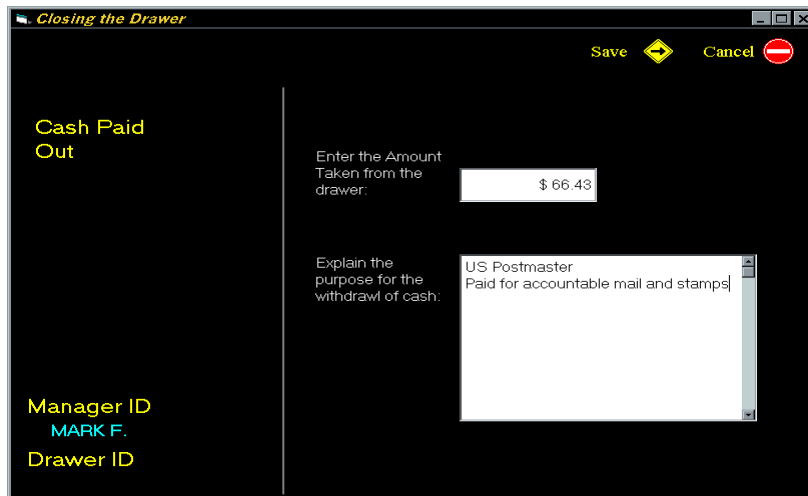
C) Deposit:

Some stores need to make deposits a couple of times per day. The purpose of this function is to prepare a deposit slip. From the POS click on Administration and POS Manager: First click on the checks to be included in the deposit. When the expected amount of checks is selected, the check amount will light up yellow. The purpose of the deposit slips is to allow you a document to prepare a deposit ticket for the bank.



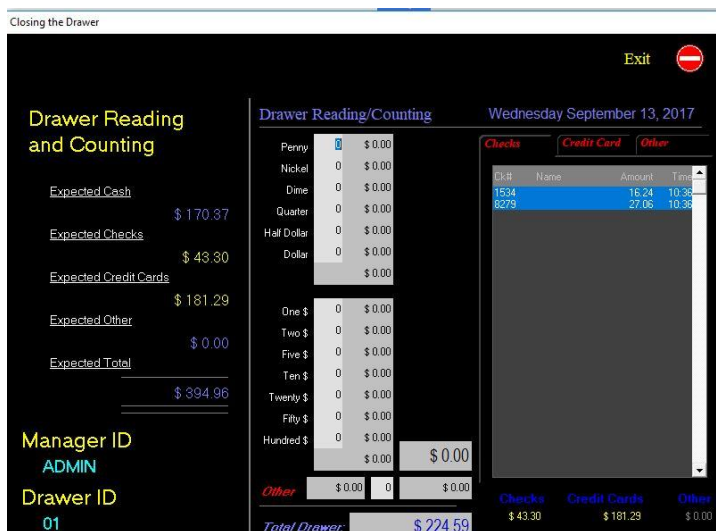
D) **Cash Paid Out:**

Occasionally you will have to pay a vendor with cash out of the drawer. Example: Window washers, Postage purchase, etc. Click on save when done. A Paid out cash slip will print. This goes into the drawer for the end of the day close out.



E) **Drawer Reading and Count:**

This is for those stores that perform readings during the business day. You may do as many readings as you deem necessary. Of course, this is not necessary for most stores.



- **Recovery Previous Packages:** This will recover the last shipment invoice

- **Change Account:** Use this to change the account in the Sold To Field. It will highlight the name of the party in the SOLD TO box. You may begin typing a new name in the SOLD TO box.
- **Customer Payment by Invoice** (Ctrl +F6): (doesn't work)
- **Drop Off Manager** (F5) – takes you to the screen to record drop off packages
- **Package Check in/Check out** (Ctrl + F5) – takes you to the screen to accept incoming packages for mailbox holders and package receiving customers.
- **Show Stock Warning Form when Qty drops below 5:** This is for producing a warning when the quantity on hand of an inventory item gets down to 5.

7. INVENTORY SETUP:

a. To setup the inventory enter the POS – click on the PLU (Price Look Up) pull down menu and select Inventory Setup. The below screen will be displayed:

The screenshot shows the 'Inventory Master' window with a menu bar (File, Print) and a toolbar with navigation icons. The main area contains a table with the following columns: SKU, Desc, Department, QTY, ReOrder, Cost, Sell, SVC Tax, Packing, and File. Below the table are 'View:' and 'Sort:' sections with input fields and radio buttons.

SKU	Desc	Department	QTY	ReOrder	Cost	Sell	SVC Tax	Packing	File
STMP1850	Stamper Size 1850	RETAIL	0.00	0	8.50	16.00			
STRG	STUDENT STORAGE	STORAGE	0.00	0	0.50	1.00			
STSETUP	SETUP CHARGE S	RETAIL	0.00	0	0.25	1.00			
TAPE2	TAPE, 2" LG	RETAIL	0.00	0	0.70	3.49			
TAPE3	Tape 3" Clear	PAK_SPL	23.00	5	0.85	3.99			
TEST	Test Item	PACK	0.00	0	0.00	500.00		<input checked="" type="checkbox"/>	File
TRACK_NO	Tracking No:		0.00	0	0.00	0.00			
TRCK	Trucking	TRUCK	0.00	0	0.50	1.00			
TRUCK	Trucking	MISC NON TAX	0.00	0	0.60	1.00			
TUBE	MEDIUM LARGE TU	OFFICE	3.00	1	1.50	4.99			
TUBE-LARGE	LARGE TUBE	OFFICE	3.00	1	1.70	5.99			
UPS	UPS MISC	UPS	22.52	0	0.50	1.00			
USPS	US POSTAL SVC	USPS	0.00	0	0.01	0.01			
USPSINTL	USPS INTERNATIO	METER	0.00	0	0.75	1.00			
USPSPC	Post Card	METER	0.00	0	0.20	0.30			
USPSPCI	Post Card Intl	METER	0.00	0	0.50	0.60			
WU	WESTERN UNION	MISC NON TAX	-704.00	0	0.00	0.00			

View: SKU: Desc: Dept: Class: Packaging Normal

Sort: Ascending Descending

This is the inventory master. You can do many editing functions here. What you cannot do from this form is ADD a new item, or DELETE an existing item. For those functions, go down to section b. below.

SKU: This is the alphanumeric used to track items in the software. This can be scanned in using a barcode scanner from items.

Desc: This is a description for the item. Shiprite recommends that the Item Description stay below 10 characters so it can be displayed on a Pole Display.

Department: This is department that the item belongs to.

QTY: This is the number of items listed in the inventory.

ReOrder: This is the number of items that the QTY need to be reduced to in order for the reorder recommendation to be displayed.

Cost: This is the cost to you.

Sell: This is the amount that you will charge.

SVC Tax: This indicates whether the item is subject to the Service Tax. If your region goes not charge a service tax please ignore this area

Packing: This will select if the items is to be used in the PackMaster. PackMaster information will be further discussed in the section on Tab 3.

Class: This is the class that the item belongs to. This field only relates to the PackMaster. The possible values for this field include "Wrap", "Boxes", "Filler" and "Difficulty".

Weight: This is the weight of the item. This value is only used by the PackMaster.

L,W,H: This is the length, width and height of the item. This value is only used by the PackMaster.

Default: This will list if the item is the default item in its class. This value is only used by the PackMaster.

Summary: This will show weather this item will display on customers receipts if the item is selected by the PackMaster. All inventory items selected by the POS will appear on the customers receipt. This value is only used by the PackMaster.

View: This are will allow you to search the inventory. Enter the value you want to search for in the appropriate field and press the refresh button. The inventory list will change to display only items that are included in your search.

Sort: This will control weather you want to display the inventory items in ascending or descending order. The Order is based on the items SKU.

Exit: This will exit the Inventory Master.

Add: Add a new entry to the inventory.

Edit: Edit the selected item in the inventory.

b. Pressing Add or Edit will open the inventory detail window. This will allow you to edit the inventory in greater detail or add an item or delete one.

PLU (Price Look UP)#: This is the item's SKU (Stock Keeping Unit). Enter (or SCAN) the SKU number into this field. If the item is found, the detail will pop into all the fields automatically. At this point, you may edit the item. Click SAVE when finished. If you enter a PLU and the item is not found, the SEARCH LIST will display. At this point, you can add a new item. Press the ESC key and you will return to the above INTENTORY DETAIL SCREEN. But now the PLU# will be displayed. Now continue to enter the rest of the info....

Description: This is the items description. This should be a common sense description of the item. This is the description that will print on the customer receipt. This is a REQUIRED field.

Department: This is the Department that the item will belong to. Press Enter to display a list of the current departments. Select the Department that best fits the item that you are currently setting up. This is a REQUIRED field. Remember that the department you select will depend on whether the item is TAXED or NOT.

Cost: This is the Cost of the item to you. Get this info from invoices from your vendors. This is a REQUIRED field.

Margin: This is your profit margin. Changing this will change the Sell value described next.

Sell: This is the price that the item will be sold for. Changing this value will alter the value in Margin above. This is a REQUIRED field.

Down the left side:

Zero Means Out of Stock – check this box if this is a tangible inventory item that you want to keep track of how many have been sold.

This is a Note – check this box if the item is not something you sell, but just a note or memo you want on the invoice. (the note function can also be done with the Button maker)

This is a Free Hand Ledger Note – this will display a note on the customer’s ledger when this item is sold

Active – check this box if this is a current item you are currently using. Uncheck it if you are not currently selling this item but may sell it again in the future. Unchecking will make this item not appear in the Inventory master.

No Franchising - used by franchises for item that they do not have to report sales on .. ie: water / snacks

No Discounting – used for very low margin items (like stamps). If someone gives a customer a discount, this item will not be discounted.

Do not include in net income – this would be for flow thru accounts like Western Union for example.

UPC/Barcode – this allows you to have a record (and to ring up) an item by the barcode when another name was used in the SKU field.

Ledger Message - this is not used in this version of the software.

Quantity on Hand – enter how many of these items you currently have.

Re-Order Threshold – enter the number in which you want to be reminded to reorder this item.

Note: Model Number / Brand Name / Category / Vendor Part number / Part for Model # are not used in this version.

Additionally, there is a panel of buttons on the RIGHT MARGIN of this window. They are:

Exit: Exit the package details. This will not Save changes made

Save: Save the changes made to the inventory. This will not exit the Inventory Details screen

Clear: This will clear the form. No changes will be saved.

Delete: This will delete the selected inventory item. The change will be saved to the Database. Deleted items cannot be restored.

Merge: This will open the merge utility allowing you to merge two inventory items together.

Sync: **Not used in this version**

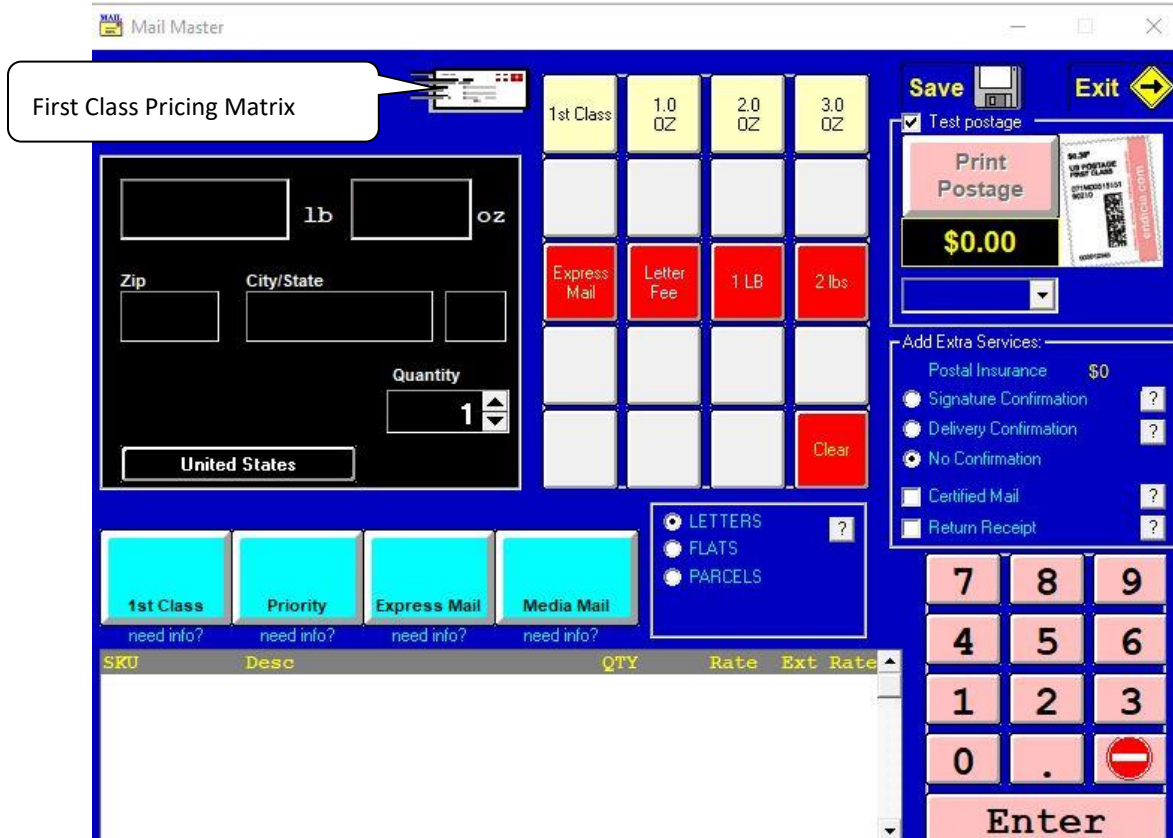
UP: Move to the next higher inventory item.

Down: Move to the next lower inventory item.

The Inventory is divided into Tabs. These tabs are “General”, “Level Pricing”, “Miscellaneous”, “Inventory Cards”, “Serial Numbers” and “Warranty”. These tabs are specific for different types of inventory. IF you are adding an item that is linked to the PACKMASTER (boxes, loose fill, bubble wrap, etc), You will need to click on MISCELLANEOUS and enter the details on those items.

8 MAILMASTER

The MailMaster is a program within your ShipRite Global Connect Point of Sale that allows you to handle all of your mail needs. The following section will break down all of the sections of the MailMaster, and give you a step by step guidance of how to maximize this powerful utility.



Entering MailMaster

Entering the MailMaster is a simple process. From your Point of Sale, simply press the MailMaster button located on your button panel. If you do not have a button, you can create one by using the Adding a Button procedure located previously in this manual.

Sections


A. Pricing Envelope

The envelope highlighted in the screenshot by the letter A is the access point to the MailMaster pricing scheme. By single left clicking on the envelope, you will be taken into the Pricing Matrix. From here, you will be able to change the costs and retail prices for First Class Mail, as well as your Postal Insurance.

Setup US Mail

First Class Mail

WEIGHT	COST-Letter	RETAIL-Lette	COST-Flat	RETAIL-Flat	COST-Pack	RETAIL-Pack
1.00	0.49	0.60	0.98	1.88	3.00	6.04
2.00	0.70	1.00	1.19	2.31	3.00	6.04
3.00	0.91	1.40	1.40	2.73	3.00	6.04
3.50	1.12	1.75	1.61	3.15	3.00	6.04
4.00	0.00	0.00	1.61	3.15	3.00	6.04
5.00	0.00	0.00	1.82	3.58	3.16	6.53
6.00	0.00	0.00	2.03	3.99	3.32	6.98
7.00	0.00	0.00	2.24	4.41	3.48	7.42
8.00	0.00	0.00	2.45	4.55	3.64	7.87
9.00	0.00	0.00	2.66	5.27	3.80	8.31
10.00	0.00	0.00	2.87	5.69	3.96	8.72
11.00	0.00	0.00	3.08	6.12	4.19	9.20
12.00	0.00	0.00	3.29	6.54	4.36	9.64

Exit 

1. Editing the Pricing Matrix

To change the pricing in the MailMaster is a simple process. Simply single left click in the field you wish to edit, and type in the new price in the field provided in your ShipRite program. Upon exiting, you will be prompted to restart your software. Please keep in mind that the new changes will not take effect until you exit your program, and restart it.

2. Editing Accessorial Charges

The accessorial charges are located underneath your pricing matrix in MailMaster. These cover such features as Delivery Confirmation, Postal Insurance, Certified, and Return Receipt. To change the prices for these features, simple single left click in the field you wish to edit, and type in the new value. As with the pricing matrix, changes will not take effect until you exit your program, and restart it.

B. Package Information Box

The package information box is the black box located on the left side of your MailMaster. This section is used to input packages over one pound. Please note that the ShipMaster can also be used to enter in package information, and will allow you to enter in dimensions. The MailMaster will assume that all of the dimensions are within the specifications as defined by the USPS Service Guide. This guide is available through either your local post office, or www.usps.com.

1. Weight Information Boxes

The first section of the package information box is the weight information boxes. This consists of both the pounds and the ounces. If your scale is setup properly, this section will be completed for you by the program. If you do not have a scale connected to your ShipRite program, you may enter the weight in these boxes manually. Simply type in the pounds, and then use the Tab key to move over to the ounces.

2. Location Information Boxes

The second row of boxes in the package information box is the location information boxes. This includes the zip code, city and state. These boxes are used for domestic shipments only. For international destinations, see the following subsection. To complete this information, you will need to enter the zip code. To do this, make sure the cursor is in the zip code section and type in your destination zip code. When the fifth number is entered, ShipRite and MailMaster will complete the city and state information for you. If the zip code entered has more than one location, MailMaster will show all of the available locations. To select the location, double left click on your choice, and the MailMaster will select this location, and fill in the appropriate information.

3. Country

This box displays the country of destination for your package. It is automatically defaulted to the United States.

4. Quantity

This box is used to set the total quantity of an item. For example, if you had seven 10oz first class letters, you can change this quantity to seven. To change the quantity, you can either use your mouse and single left click on either the up or down arrow to the right of the quantity, or left click on the box itself, and type in the desired quantity.

C. MailMaster Speed SKU Button Panel

The MailMaster Button Panel is a powerful tool designed to allow you to put all of the numerous features of the MailMaster within a single mouse click. Setting up this tool to match your specific needs is a simple procedure. This panel works similarly to the point of sale button panel.

1. Types of Buttons

Each button on the panel has one of three designations. It is either a **SKU** button, a **GROUP** button, or a **FUNCTION** button.

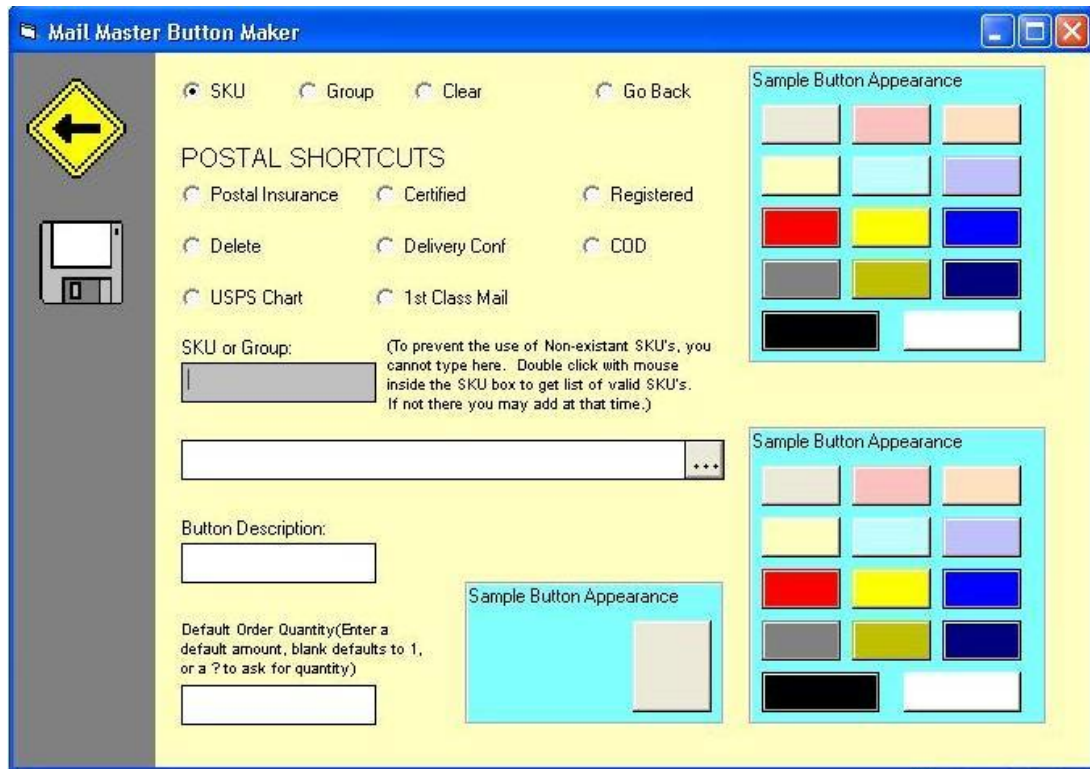
A SKU button is an individual sale item that when it is single left clicked, it will process a specific item. For example, in the default panel that MailMaster provides, if you click on the 1.0 oz button, this will send the SKU M1 to the Sale Listing, with the proper item information and price.

A GROUP button is a button that when it is single left clicked, it will take you to a sub-panel with more choices available. A good example of this is the First Class button in your default MailMaster setup. By single left clicking this button, the program will take you into a subsection, with options available such as four to thirteen ounce first class mail, or postal insurance.

A FUNCTION button is a button that is used by the program to do a task. A good example of this is the Go Back function. This function when clicked will return you to the main button panel.

2. Creating a button

To create a button, you will need to find an empty button on your panel. Single left click the blank button and you will be brought to the button creation screen. This screen looks like the following:



This screen functions exactly like the point of sale button maker. Select the type of button you wish to create in the top section of the screen. You can use the mouse button to single left click the radio buttons to select the type. If the type is a SKU or Group button, you must double left click in the grey text box to select the specific item. After this is selected, make sure to type in a button description, and select colors that will make the button easy to read, and functional.

3. Editing a button

To edit a button, single right click on the button you wish to change. This will bring up a menu giving you the option to edit or delete the button. Single left click on the Edit option and you will be brought into the MailMaster button maker screen. The procedure is the same as creating a button.

4. Deleting a button

To delete a button, single right click on the button you wish to change. This will bring up a menu giving you the option to edit or delete the button. Single left click on the Delete option and the button will be removed from the panel.

D. Service Bar

The service bar is located just under the Button Panel and the Weight Information Box. This bar is used to display the available USPS services you can offer to your customer for specific package information that is entered.

E. Sale Item Listing

This area is a listing of all the items you have selected in the MailMaster. This box will list the SKU, description, the cost, and the extended cost of the item. These items are what will be transferred to your point of sale upon saving and exiting

F. Number Pad

The number pad is for use with touch screen monitors and for people who prefer to use the mouse. It mimics your number pad on your keyboard and can be used at any time.

G. Save and Exit

The Save and Exit buttons will return you to your point of sale. Save will take any items in the Sale Item Listing, and place them into your point of sale. Exit will leave the MailMaster without transferring any data. The program will prompt you to double check this decision if there is mail in the listing box.

8. CUSTOMER ACCOUNT MANAGER

This chapter deals with setting up accounts. To add a customer as a charge account you can do it on the fly as they stand in front of you or they can be added later at your convenience. You can also set up a cash account customer and you will be able to track their spending in your store.

If you are using the POS you MUST create the account through the POS using any one of the methods that are discussed below. DO NOT use the Accounts Receivables option from the Main Menu under the Actions pull down menu to add accounts, they will not be linked properly to your address book.

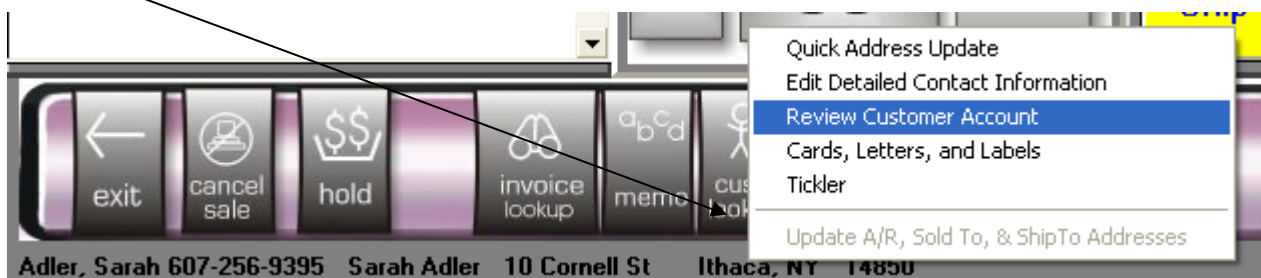
A. CASH ACCOUNT CUSTOMERS

This is a customer who you are entering their sales as if they were a charge account; however you are getting paid from them each time. To add a customer for the first time, from the Main Menu, go to the Point of Sale. Click on the Customer lookup button. Enter the customers' last name or company name in the search list. If it is not located in the search list, click the Add button. This will start the familiar ShipRite Contact Manager. Enter the first name, then TAB throughout the rest of the form and enter the requested data. When done click SAVE. You may now track all the sales to this one individual customer by loading their name through customer look up. You will see the name appear at the bottom of the POS screen, underneath the function buttons.

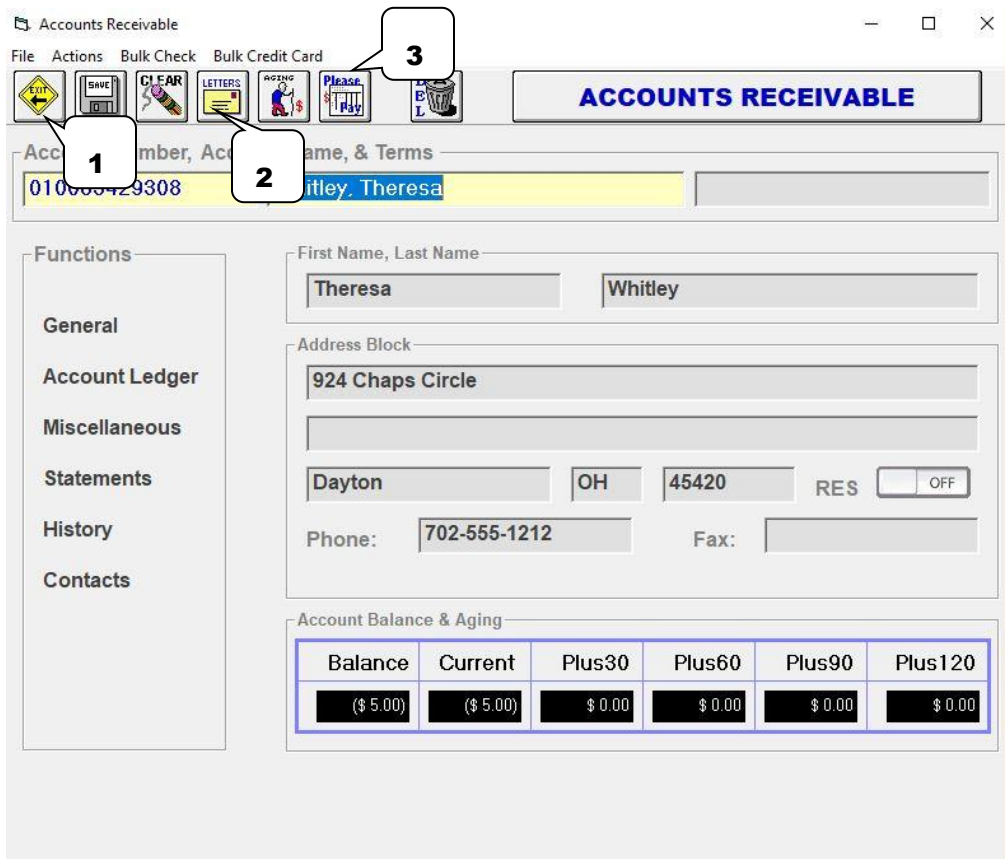
B. CHARGE ACCOUNT CUSTOMERS

These are customers that you have allowed to have payment terms in your store. You can add them on the fly, or at any time.

To enter a charge account customer, from the POS screen, click on Customer look up. After they are added to the Contact Manager and you return to the POS screen, their name and address will appear under the function buttons. Now RIGHT mouse click on the name and select Review Customer Accounts.



You will see the screen below: Notice all the customer data is pre-filled, including the account number. This is automatically defaulted to the phone number or you can set up your customers' accounts as you wish.



1 Save: Save changes made to current account

2 Letter: Send a letter to customer. This merging function described in Chapter 6.

3 Please Pay/Billing Statements: [Prints billing statements to mail](#) that will be explained in section C below.

1. GENERAL TAB

Account Number: You may enter any combination of letters and numbers. Many use the phone number or last name or any combination of letters and characters. If you were adding this customer on the fly while you were doing a sale, you will notice that the complete name and address came into the above form with the phone number defaulted as the account number. Continue to fill in the form and all tabs on the form.

2. LEDGER TAB

The screenshot shows the 'Accounts Receivable' window. At the top, there is a menu bar with 'File', 'Actions', 'Bulk Check', and 'Bulk Credit Card'. Below the menu bar is a toolbar with icons for 'EXIT', 'SAVE', 'CLEAR', 'LETTERS', 'AGING', 'PLEASE PAY', and 'DEL'. A large blue button labeled 'ACCOUNTS RECEIVABLE' is positioned to the right of the toolbar. Below this, a section titled 'Account Number, Account Name, & Terms' contains two input fields: the first contains '010083429308' and the second contains 'Whitley, Theresa'. On the left side, there is a vertical sidebar with the following menu items: 'Functions', 'General', 'Account Ledger', 'Miscellaneous', 'Statements', 'History', and 'Contacts'. The main area is titled 'Account Ledger' and contains a table with the following data:

Date	Description	Invoice #	Charge	Credits	Balance
08-23-2017	Sales	1154	\$ 84.00		\$ 84.00
08-23-2017	Cash Payment	1154		\$ 89.00	-\$ 5.00

At the bottom of the window, there is a section for 'Ledger by Invoice' with a toggle switch set to 'OFF', and a section for 'Adjustments' with a trash can icon and a printer icon.

Each Customer account will have its own ledger. The entries you see in the ledger are HOT. That means that you can double click on each item to see the detail of the sale or payment. This is basically the detail you will see when you do a monthly report.

3. MISCELLANEOUS TAB

Fill in or select those items that apply to this account. For Tax Exempt Customers, you must fill in their Exempt Number and choose Tax – Exempt as the county. You can also enter a discount amount; entering 10 in the discount field will apply a 10% discount for any transaction for this account holder.



ACCOUNTS RECEIVABLE

Account Number, Account Name, & Terms

010083429308

Whitley, Theresa

Functions

General

Account Ledger

Miscellaneous

Statements

History

Contacts

Miscellaneous

Tax County:

Tax Exempt:

 OFF

Exempt ID Number:

Account Price
Level:

Discount:

Account Limit:

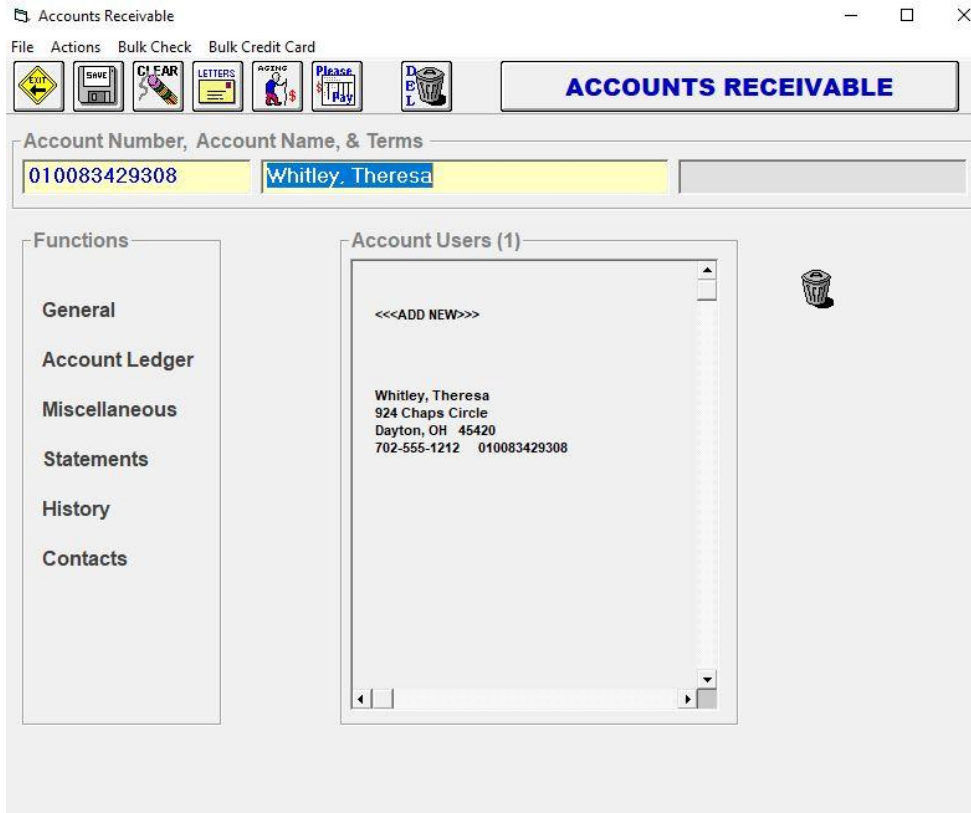
4. STATEMENTS TAB

5. HISTORY TAB

The History tab lists all of the sales transactions. If you want to reprint the receipt, double click on the row that contains the sale and it will bring up the invoice in the POS for you to review or reprint.

6. CONTACTS TAB

You can add additional users to an account, and you can delete unwanted users as well. Click on the “+” button. This will take you to the Name & Address Entry form, you can add a new user from here. If you need to delete a user, highlight the user and then click on the “-” button, that will remove her/his name.



B. BILLING STATEMENTS / AGING SUMMARY

At the end of the month, you may want to send a statement to your charge account customers. To print the statement, from the Accounts Receivable window click on the Please Pay icon on the top right. Go ahead and enter any Account number in the Accounts box or you can print all accounts' statements.

Statement Processing

Accounts:

083429308

0100834293

All Accts

Important Dates:

Statement Begin Date: 08-01-2017

Statement End Date: 08-31-2017

Statement Date: 08-31-2017

Due Date: 09-15-2017

Sun	Mon	Tue	Wed
		1	
6	7	8	
13	14	15	
20	21	22	
27	28	29	

Balances Over: \$0.00

Last Statement Date:

Format Report Options:

No details Charge details

Sale details All details

Email **Print** **Cancel**

This search will result in ONE statement being printed for the current account.

If you wish to print all accounts at the end of the month, click on the All Accts button and then click continue.

Click Continue to process the statement. This will produce a statement that you may fold and place in a windowed envelope to mail to the customer. It will have a tear off strip on the bottom for the customer to tear off and remit with payment. You may change the default dates to suit your needs. You also have the option to Email the statement to the customer

Statement

ShipRite Demo Las Vegas
 ShipRite Demo Las Vegas
 924 Chaps Circle
 Henderson, NV 89002
 315-555-1212

Report Date: 8/28/2017

Murphy, Mary
 6956 Number Nine Rd
 Brookville, OH 45309

STATEMENT DATE	ACCOUNT#
08/31/2017	010074270745

Page 1 of 1

DATE	INVOICE#	DESCRIPTION	CHARGES	PAYMENTS	BALANCE
		Previous Balance			\$112
		Closing Balance			\$171
08-21-2017	1143	Sale: Sales			\$112
		Sale: Stamps Roll 100 Ct			
		Total Sales:	\$59		\$171

AGING SUMMARY

Current	Plus30	Plus60	Plus90	Plus120	Balance
.59	0	0	112	0	171

Seriously past due. Remit today.

Please Pay: \$ 171

Above will create a report showing the aging of your receivables: Current, 30 days, 60, 90 and 120+.

A/R ALPHA LIST REPORT

The report will list all accounts that are currently setup in your POS. The difference between this report and the AR Aging summary is that it will include all accounts, including ones that do not have a balance. To print that report from the main menu, go to Actions > Accounts Receivable > File > Print > AR Alpha Listing.

D. CHARGE SALES

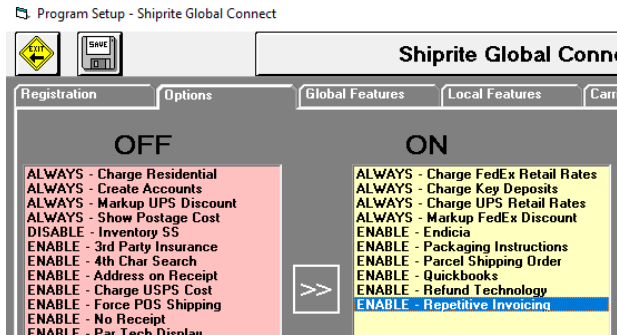
In the Point of Sale, you will need to specify which customer you are selling to. To recall a charge account customer while making a sale, click on the Customer lookup button and enter the customer last name or company name. If this is a new account holder, you will add the contact information in the Name & Address Entry Form in the [Contact Manager](#) first. Highlight the customer name and click ok. When ready, click the receipt button, this will bring you to the Payment Master screen. Click complete sale, do not enter any dollar amounts. This will charge the total sale to the customer's account.

E. REPETITIVE INVOICES FOR A/R ACCOUNTS

ShipRite can automatically generate repetitive invoices every month and automatically apply credit card payments to these invoices. This feature functions by selecting a completed invoice and setting up the

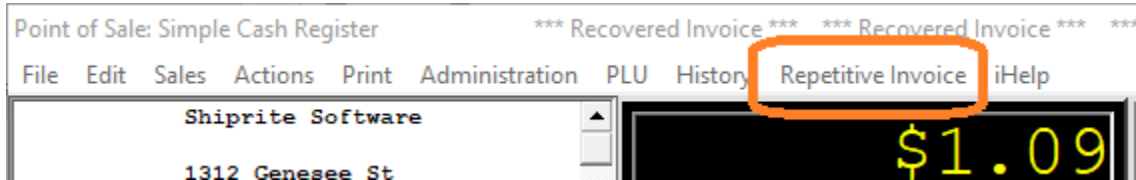
repetitive invoicing for the exact same invoice. This invoice will repeat each month as a set date over a certain period of time.

To turn on the Repetitive Invoicing, go to Setup > General Setup Options > Options > “ENABLE – Repetitive Invoicing”. Turn that option ON, then click Save and Exit



To setup this function, go to the POS, click on Customer Lookup and pull up the customer (the customer has to have an AR account). Now, create the invoice by ringing in the needed SKUs. Click Receipt to open the payment screen and click the “Complete Sale” button to charge the invoice to the account (do not take any payment at this time).

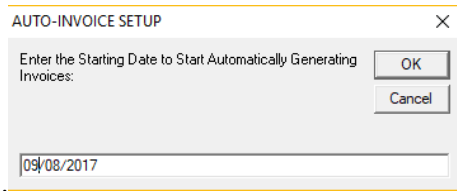
Once the sale is completed, click on the Invoice Lookup button and double click on the invoice you just created to view it in the POS. On the top menu, an option for “Repetitive Invoice” will appear.



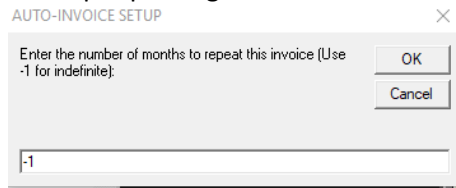
Once that option is clicked, a message will display informing you that a repetitive invoice is being set up. Click “YES” to proceed.

The next message will prompt you to enter the date to start automatically generating the selected invoice.

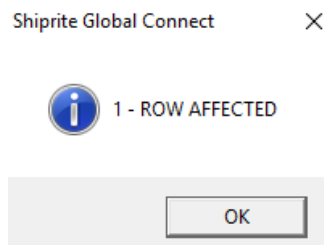
On the selected date, an exact copy of the currently selected invoice will get created. Click OK to proceed.



In the following message box, enter in the number of months to repeat the invoice. Enter in -1 to keep repeating the invoice indefinitely.



The final pop up message will confirm that the repetitive invoicing has been set up. Click OK. The Invoice will remain displayed in the POS. Do not close it out yet; check the instructions below to apply payment.

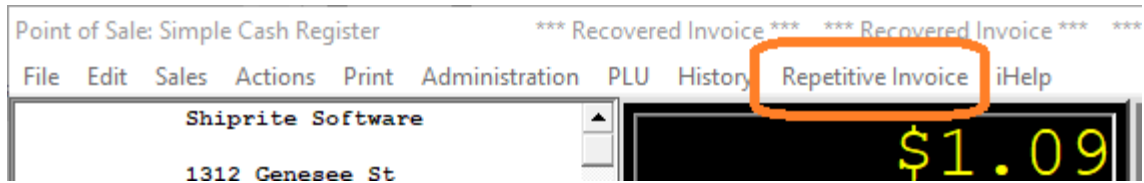


Setting up automatic credit card payment for the repetitive invoices:

The automatic credit card payment only works if you're using a Cayan Genius terminal to process a credit card.

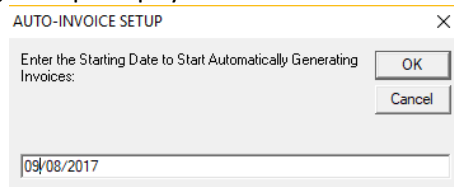
Pull up the invoice you want to repeat inside the POS or create the invoice by ringing up the needed SKUs. Click the Receipt button to open the payment screen (**This has to be a new/unpaid invoice; if it is an invoice that is already paid off then it will just reprint a receipt and not ask for payment**). Click on Credit Card and process the payment through the Cayan Genius terminal. At this point, a receipt will print out and a token will be created with the credit card information encrypted and stored on the Cayan server.

Once the sale is completed and now paid for, click on the Invoice Lookup button and double click on the paid invoice to view it in the POS. On the top menu, an option for "Repetitive Invoice" will appear:



Once that option is clicked, a message will display informing you that a repetitive invoice is being set up. Click “YES” to proceed.

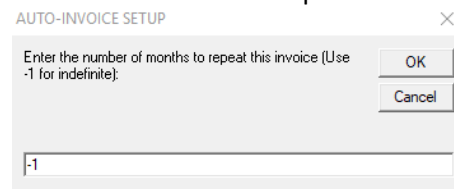
The next message will prompt you to enter the date to start automatically generating the



selected invoice.

On the selected date, an exact copy of the currently selected invoice will be created. Click OK to proceed.

In the following message box, enter in the number of months to repeat the invoice. Enter in -1



to keep repeating the invoice indefinitely.

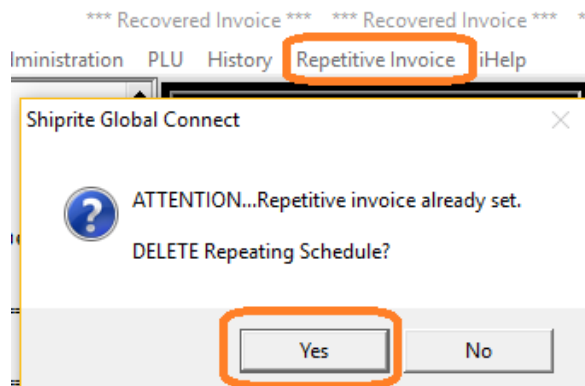
The final pop up message will confirm that the repetitive invoicing has been set up. Click OK. The Invoice will remain displayed in the POS.

For the upcoming repetitive invoices, ShipRite will use that token to automatically process a payment for the created invoice.

In case that any other form of payment is taken, or no payment is taken at all, no automatic payments will be applied to the repetitive invoices. They will simply be charged to the account each month and added to the running balance.

Stopping repetitive invoices:

In order to cancel and stop specific repetitive invoices from being created, pull up the customer tied to the invoice in the POS. Then, click “Actions” at the top > “Repetitive Invoices” and find the invoice number you wish to stop. Please note that invoice number, then exit that screen and go to “Invoice Lookup” on the bottom. Pull up that noted invoice number, then on the top menu click on “Repetitive Invoice”. A message will appear to confirm the deletion of the repetitive invoice schedule. Click YES. The scheduled repetitive invoice will then be cancelled.



If you wish to get a list of all your repetitive invoices, go into the POS without selecting a customer account > Hit “Actions” at the top > Select “Repetitive Invoices” at the top. This should then display all original repeating invoices for your customers.

F. RECEIVING PAYMENTS

After charging a sale to a customer, you will eventually need to record a payment. There are 4 ways to receive and record a payment.

1. TO RECORD A PARTICULAR INVOICE AS PAID

From the POS screen click on the invoice lookup button. Locate the invoice by typing in the number in the search field or scrolling through the list of invoices highlighting and choosing OK. This will recall the invoice on the POS screen. Click on the Receipt button and the familiar payment screen will appear. Enter the amount in the appropriate field i.e. Cash, Check or Charge and click Complete Sale.

2. USING FIND TO LOCATE A CUSTOMER

You may also record a payment for a particular invoice by going to Customer Account Management and press Enter. That will take you to Account Receivables list. Hit ENTER in the Account number field, this will bring up a list of all account holders. Select the account holder from the list. Then click on the LEDGER tab. Find the invoice down the list. Double click on the invoice number and the invoice will be recalled on the screen. Press CTRL F6 and the familiar Payment Processing screen will open. Enter the amount tendered and press enter to record the amount paid.

3. ACCESS ACCOUNT FROM THE POS

You may also record a payment for a particular invoice entering the account name in the POS screen. When the customers name and balance is displayed, right mouse click on the highlighted name, a menu will appear. Select Review Customer Accounts and this customer’s account open in the Accounts Receivables screen. Click on the LEDGER tab. Find the invoice on the list. Double click on the invoice

number and the invoice will be recalled on the screen. Press RECEIPT and the familiar Payment Processing screen will open. Enter the amount tendered and press enter to record the amount paid.

Accounts Receivable

File Actions Bulk Check Bulk Credit Card

ACCOUNTS RECEIVABLE

Account Number, Account Name, & Terms

010074270745 Murphy, Mary

Functions

- General
- Account Ledger
- Miscellaneous
- Statements
- History
- Contacts

Account Ledger

Date	Description	Invoice #	Charge	Credits	Balance
05-09-2017	Sales	1100	\$ 176.61		\$ 176.61
05-09-2017	Cash Payment	1100		\$ 181.61	-\$ 5.00
05-12-2017	Sales	1107	\$ 216.50		\$ 211.50
05-12-2017	Cash Payment on Account	1108		\$ 100.00	\$ 111.50
06-23-2017	Sales	1124	\$ 63.26		\$ 174.76
06-23-2017	Cash Payment	1124		\$ 63.26	\$ 111.50
08-21-2017	Sales	1143			
08-28-2017	Cash Payment	1143			

Ledger by Invoice OFF Adjustments

Just double click on any invoice number or sale to see the original invoice.

4. RECORD PAYMENT ON ACCOUNT

You may also receive payment on account without assigning the payment to a particular invoice. This is quite handy if you have a large number of invoices paid by a single check.

Select the customer lookup button, locate the account holder. Once the account holder is loaded through the POS – click the receipt button, enter the dollar amount you will be paying in the appropriate field and click the green Complete Sale button.

The screenshot displays the 'Payment Master' interface. On the left, a black box shows 'Total Sale: \$ 111.50'. Below it, 'Cash: \$ 50.00' is entered, 'Check:' and 'Card:' are empty, and 'Other:' is a dropdown menu. 'Payments: \$ 50.00' is shown with a red underline, and 'Change: (\$ 61.50)' is shown with a red underline. A central numeric keypad includes buttons for digits 0-9, 'Del', and 'Enter'. To the right, there are buttons for '1', '20', '50', '100', 'Exact', and 'Cash'. Below these are 'Debit Card' and 'Credit Card' buttons. A 'COMPLETE SALE or CHARGE to Acct' button is prominent. At the bottom right, there are 'CANCEL SALE' and 'Apply Credit to Account' buttons. The 'Email Receipt:' field contains 'theresa@shipritesoftware.com' and the 'Posting Date:' field contains '08/28/2017'.

In the above screen shot you will see there is a \$50 payment applied and in the Change field you will see the account balance after the payment.

G. ESTABLISHING CREDIT BALANCES

There are functionally 2 ways of establishing credit balances. One is where the customer overpays an invoice and opts to apply the change to future purchases, or you can apply the credit to the account. To set up a customer as a DEBIT account, make sure they are first set up as an account as detailed in page 2 of this chapter. Load the account holder through the POS. Once the account is loaded click on the receipt button, click the APPLY CREDIT TO ACCOUNT button.



You will see ***Credit***Credit**Credit***Credit** displayed on the Total Sale field. Click the Complete Sale button.

H. OVERPAYING AN INVOICE OR PREVIOUS BALANCE

Normally, when the customer gives you more for the invoice or the balance than there actually is, the "Change Due" form will appear. At that point you would hand the customer the change and their balance will be ZERO. If you want to apply the change to their account follow this procedure. A new button was added to the Payments form, "Apply Credit to Account". When you click SALE WITH RECEIPT (OR WITHOUT), the payment form opens up. **IMMEDIATELY** click the "APPLY CREDIT TO ACCOUNT" button. Now input the amount of the money or check tendered. Then click the Complete Sale button. The sale will be completed, and the customer will now have a DEBIT balance. You will NOT get the change due window.

I. ENTERING A PREVIOUS BALANCE AS A CREDIT

This is useful if you need to bring in a balance from another POS or Accounting System. This involves creating an Inventory Item, which is in fact a "non-production" credit code. Go to Inventory Setup, Use "PB" for the SKU and enter "Previous Balance" for the description. Then you will click on the "Non-Production" Note Code. Enter "Previous Balance" in the Ledger Message Box. This will replace the customary "Sales" description in the ledger with "Previous Balance".

Start an invoice; enter the customers name and address. Now enter "PB" and then ENTER in the SKU field. The cursor will move to the "Unit Price" box type in the amount. Hit enter. Close the sale with or without a receipt. In the payments screen, simply hit the Complete Sale button to post the amount to the accounts ledger. If the account did not exist, it will automatically enter the account receivables screen. Click Save to create the account.

J. TO ADD A CREDIT ACCOUNT

1. In the POS screen, go to customer lookup or add them in the Quick Name & Address Entry Form by hitting the Add button on the consignee search list.
2. Click on the Receipt or No Receipt button.
3. In the payment screen, before you enter any money, click on "Apply Credit to Account". What this does is prevents the automatic closing of the payment screen when more than invoiced is entered as a payment. It also puts "****CREDIT****CREDIT****" across the payment view window.
4. Enter the amounts of money, credit card, or checks paid.

5. Hit the "Complete Sale button" and you will have applied the credit.

K. DISCOUNT MANAGEMENT.

You may issue discounts a couple of different ways. If the customer has a charge account, you may give them a fixed discount off all invoices for them. Go to Customer Account [Management: Miscellaneous](#) tab. You can give any customer a discount at the time of the sale and shipping by enter the percentage of discount by hitting the discount button. Or you may give a discount off a particular line item in an invoice as enter the percentage of discount for each line in POS.

L. CUSTOMIZED SHIPPING MARKUPS

You may also give a customer a customized shipping markup different than all others that you set up in the Master Shipping Tables. This allows complete flexibility in handling those customers you wish to assign incentives to. To do this, from the POS click on the Customer Lookup button, locate the customer, click on Ship One. This will bring you to the Ship Master, right mouse click the customer name in the Ship From field and choose Customer discount. You can enter the discount as a percentage or a flat dollar amount. Just be aware that once you enter the discount it will apply to any shipment until you remove the discount.



The screenshot shows a software window titled "CUSTOMER PRICE MARKUPS". At the top left, there are "EXIT" and "SAVE" icons. Below the title bar, the word "Customer" is written in red. A text field contains the name "Murphy, Mary". Below this, there is a table with three rows labeled "Level 1", "Level 2", and "Level 3". Each row has two columns: "% Markup" and "\$ Markup". All three rows show "0.000%" in the first column and "\$0.00" in the second. To the right of the table is a yellow circular arrow icon with the word "UNDO" below it.

	% Markup	\$ Markup
Level 1	0.000%	\$0.00
Level 2	0.000%	\$0.00
Level 3	0.000%	\$0.00

M. BAD DEBT WRITE OFF

1. In POS screen, load the customer through Customer Look up.

- Balance should be showing. There may be many reasons you are writing off a balance. You may write off only part of a balance too.
- Without entering anything in the POS screen click on the receipt button.
- You will now be in the payment screen and the total due will show what is owed. Go down to OTHER, enter in the write off amount, go to the left and replace 'other' with the reason. Ex: "Bad Debt" or "Write-Off" or any other reason.

Payment Master

Total Sale:
\$ 111.50

Cash:

Check:

Card:

Other:

Payments: **\$ 0.00**

Change: **\$ 0.00**

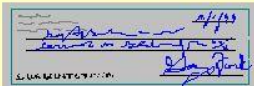
Receipt:

7	8	9
4	5	6
1	2	3
0	00	.
Del	Enter	

COMPLETE SALE
or CHARGE to Acct

Posting Date: 08/28/2017

1	1	20	20
1	1	20	20
2	2	50	50
2	2	50	50
5	5	100	100
5	5	100	100
10	10	Exact	Cash
10	10	Exact	Cash



Debit Card Credit Card

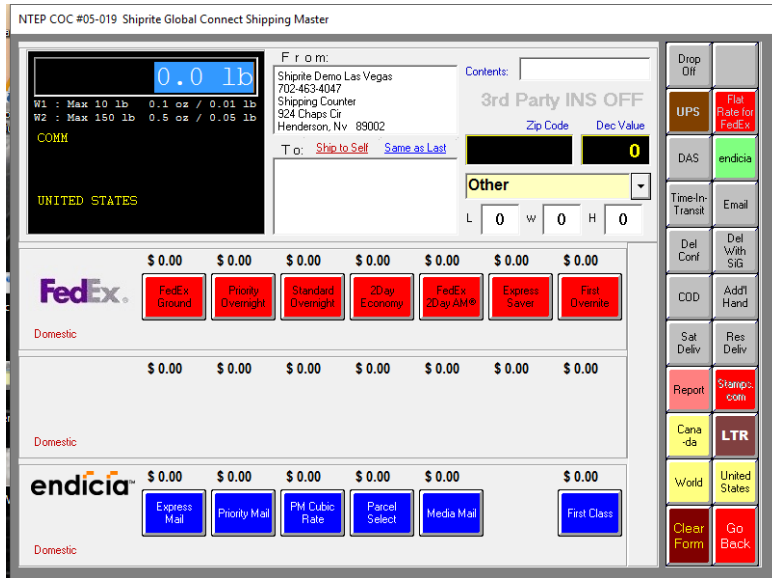
CANCEL SALE

Apply Credit to Account

Click on the word OTHER and backspace to clear it out and type whatever you want in here ie: Write off or Bad Debt, etc

Click on the "Complete Sale" button.

9. SHIPMASTER



This is the heart and soul of the shipping portion of the ShipRite V10 software. To move from field to field in the ShipMaster, you will need to press the TAB key on your keyboard, or use your mouse to move, clicking in fields. Pressing ENTER has a completely different effect on the fields. This is explained as each control is explained below. To get to the ShipMaster, first go to Point of Sale and click on Ship Package on the SKU Button Panel on the Right, or you can click on Ship button from main menu.

A. PACKAGE WEIGHT

When you first enter this screen, the FOCUS (blinking cursor) is in this field. ShipRite will detect most scales that are connected to the COM1 or COM2 ports of your computer that it can be set up your scale as described in Chapter 2. If your scale is not detected, input the weight manually and press TAB.

B. SHIP FROM

This field represents the customer who is standing in front of you shipping a package. If a customer's contact information is already in the database, enter either the last name or a company name in the Ship From entry box. You will then see her/his name and contact information pop up in the Ship From box. If a customer is new, pressing Enter in the Ship From box will take you to a Name Search list where you can add and save the contact information in the Quick Name & Address Entry Form as usual. When

a customer's name, address and phone number are displayed in the Ship From box, right click on it. There is a list drop down menu open up. You will have nine choices:



1. EDIT SHIPPER

This will take you to Name & Address Entry Form of [contact manager](#) that you can edit or delete this contact.

2. CUSTOMER DISCOUNT

This will allow you to set either a percentage or dollar value markup for a customer of different levels.

3. ADD NOTES

This will allow you to add notes to this customer's account

4. VIEW NOTES

This will allow you to view notes that were previously added

5. SHOW SHIPPER HISTORY/DETAIL

This will show the shipping history of this account.

History Search List

Date	Time	PackageID	Carrier	SERVICE	TRACKING#	ShippedTo	Charged
08-22-2017	11:51:10 AM	011096	UPS	CAN-STD		Canada Business	\$ 43.43
06-23-2017	3:21:11 PM	011081	AIRBORNE	DHL-INT	1	Canada Business	\$ 63.26

6. SET DEFAULT SHIP-FROM

This will set the highlighted contact to pop up each time you enter this Window.

7. CARDS, LETTERS, LABELS

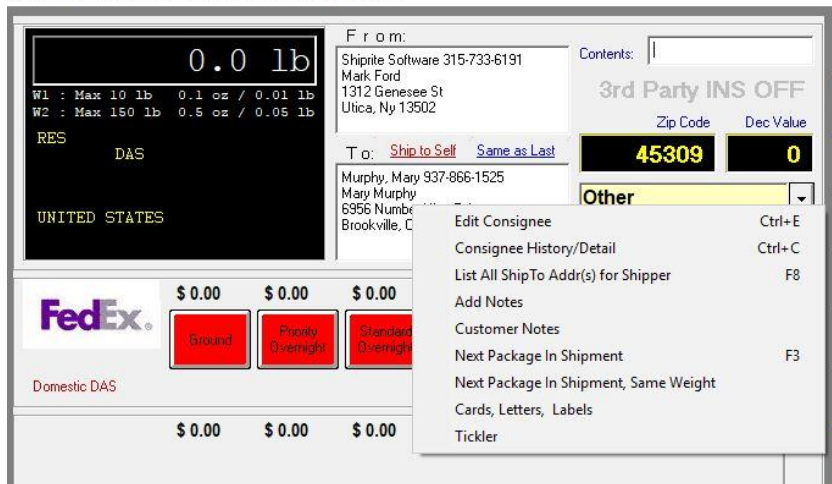
This is an exclusive feature of ShipRite that allows you to send letters to customers and is an abbreviated version of the [LetterMaster](#). It is used for Merge features on this customer only.

8. TICKLER

This is the shortcut to the [Memo Tickler](#). It defaults the name to the current customer.

C. SHIP TO

This Contact field is where the package is going. If a customer's contact information is already in the database, you can select it from Name Search List or you can add it in the Name & Address Entry Form. If you click into this field with the right button of the mouse, a drop down menu is revealed.



1. EDIT CONSIGNEE

If you already have a contact in this field, this will allow you to edit the Consignee utilizing the Contact Manager. It works as Edit Shipper.

2. CONSIGNEE HISTORY

Show the History of this consignee.

3. LIST ALL SHIP TO ADDRESSES FOR SHIPPER

This will give you a list of all the addresses this shipper has shipped to in the past. Double click on address to ship to it again.

4. ADD NOTES

This will add Notes to the customer's account

5. CUSTOMER NOTES

This is to view the notes that are in the customer's account

6. NEXT PACKAGE IN SHIPMENT

This is for shipping a multiple piece shipment. When you are shipping the second piece in the shipment and you are in the TO: field, take the right button of the mouse and click into this field while it is empty. When the drop down menu opens up, select this choice and the previous name and address will pop in.

7. NEXT PACKAGE IN SHIPMENT, SAME WEIGHT

Works the same as above, but it also puts in the weight from the previous package.

8. CARDS, LABELS, LETTERS

This works the same as in [the FROM](#) section above.

9. TICKLER

This works the same as the [FROM Section](#) above.

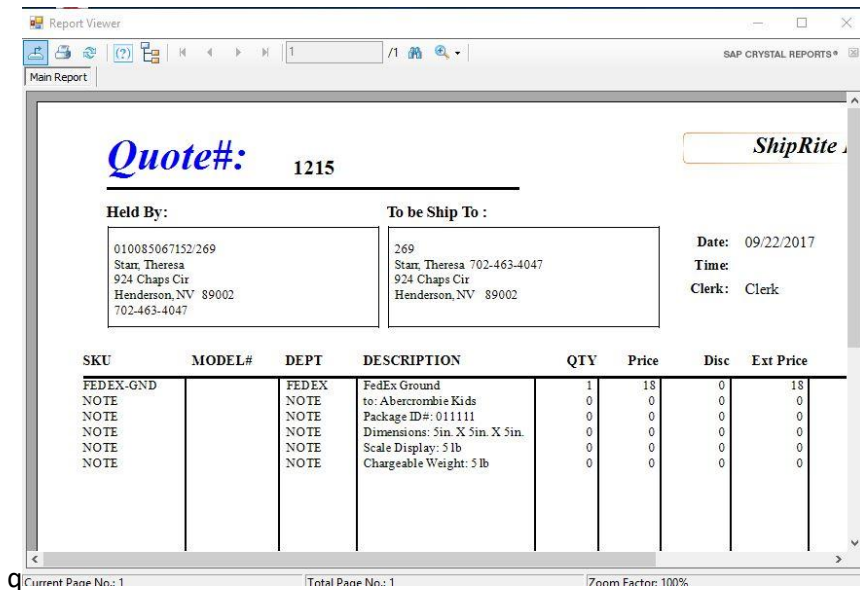
After you have the TO address entered, press the TAB key.

D. PREPARING A QUOTE

ShipRite enables you to prepare a written quote to give to a customer. Prepare a shipment as you normally would and when you get to the label page, click on Thermal Batch Label. This will bring you back to the POS screen. Put the transaction on HOLD. Click on HOLD again to bring the transaction back to the POS. Go up and click on the Actions drop down box:



This will display a written quote that you can either print or email to the customer. When the customer is ready to actually ship the package, pull up the transaction from Hold and process the transaction as usual to get a label.



E. CONTENTS & USE OF THE PACKMASTER

The ShipRite PackMaster is a powerful tool that allows for accurate, consistent, and detailed estimates for most pack jobs. All pricing and packing parameters can be initialized and customized by the store owner in order for the PackMaster to provide accurate quotes that are in line with the store pricing policy. Most importantly, the PackMaster takes the guess work out of the clerk's hands and provides clear packing quotes based on the difficulty of the job. The PackMaster removes the ambiguity of quoting a packing job and eliminates the problem of different quotes being given for the same job.

The advantages of using the PackMaster are:

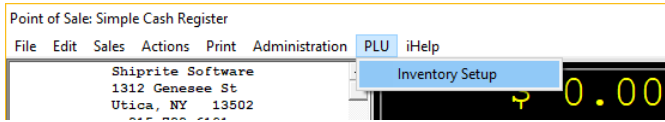
- Clear pricing options offered depending on the job difficulty
- Consistent pricing each time with the same parameters entered.
- Pack Jobs can be saved, to be retrieved and used multiple times
- Allows for specific pricing and margins to be set for labor and all packing materials individually.
- Flexibility to set specific packing parameters according to store policy
- Charge the customer for packing on the spot, and pack the item later.
- Customer receives tracking number right away, not after the item is packed.

PACKMASTER SETUP

Before the PackMaster can give accurate packing quotes, time needs to be spent on setting it up correctly. This is a crucial part of the process that requires all packing materials to be entered and priced correctly. An incomplete setup with inaccurate parameters will result in the PackMaster displaying wrong or illogical pricing and packing choices.

1. Inventory Setup

All packing materials and labor need to be entered in as inventory items. To access the inventory module, in the ShipRite POS go to the top menu and click on “PLU”, then select “Inventory Setup”.

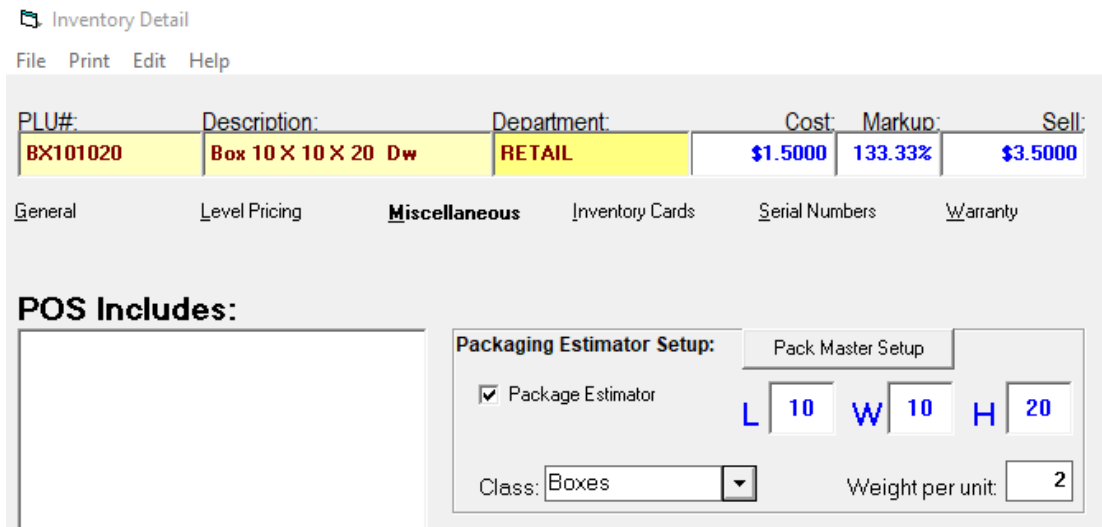


The Inventory Master screen will open, displaying your entire inventory. A lot of the packing items, such as boxes, are most likely already loaded in the inventory. If that is the case those inventory items do not have to be re-entered. Any missing boxes, wrapping, or filler will have to be added in as new inventory items. Please reference Chapter 7, Part 7 of the manual on how the inventory master works and how to enter in new inventory items.

Double click on an existing inventory item to get to the detail screen, then click on the Miscellaneous tab.

In the same way, if you are adding in a new inventory item, after entering in the SKU, Description, Department, Cost, and Sell pricing, click on the Miscellaneous tab to enter in the PackMaster parameter.

Here is an example of the parameters for a 10x10x20 box.



- Check the “Package Estimator” checkbox to indicate that the selected item is a packaging item to be used by the PackMaster.
- Class: select what type of item the SKU is. The options are Boxes, Filler, Wrap, or Difficulty.

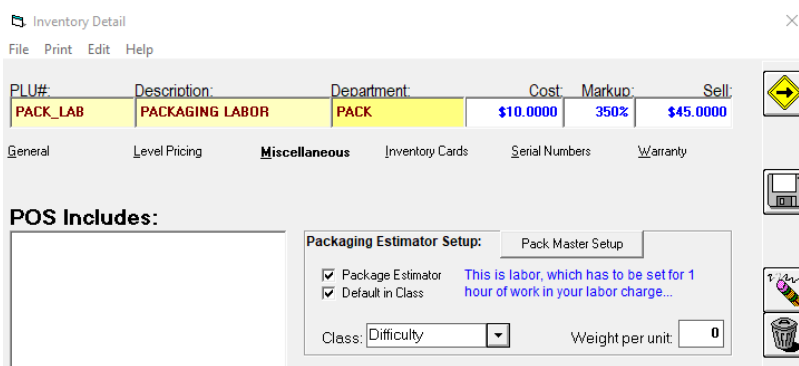
Use the **Boxes** option for all your shipping boxes. Enter in the length, width, and height of the current box. Also weigh the empty box on a scale and enter in the

weight of the box in the “Weight per unit” field.

Use the **Filler** option for materials that are used to fill the empty area in between the packed item and the box wall. This option is usually used for Peanuts and similar fill materials. The weight per unit and the Sell price of the item have to set for 1 cubic foot of fill material.

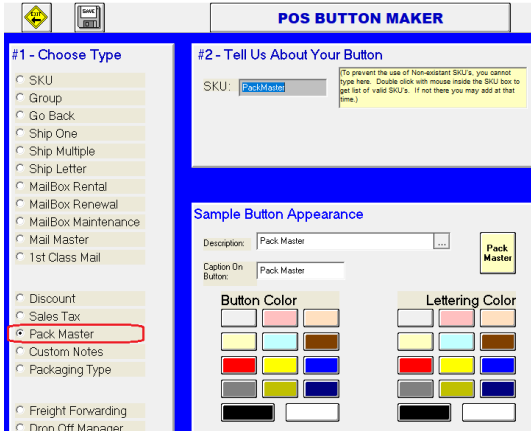
The **Wrap** option is meant for wrapping materials such as bubble wrap and foam wrap. In this case the sell price and weight per unit need to be set for 1 square foot of wrapping material.

The **Difficulty** option is used for the packing labor charge. You only need to have one SKU that has this setting. The price has to be set to your hourly labor rate. Here is an example:



In some cases, stores sell peanuts or bubble wrap as retail items for a set price. Usually there is a price difference when selling those items as a retail item and when using them for packing. If such a situation is present, then 2 separate SKU's need to be setup.

2. Packing Parameters Setup

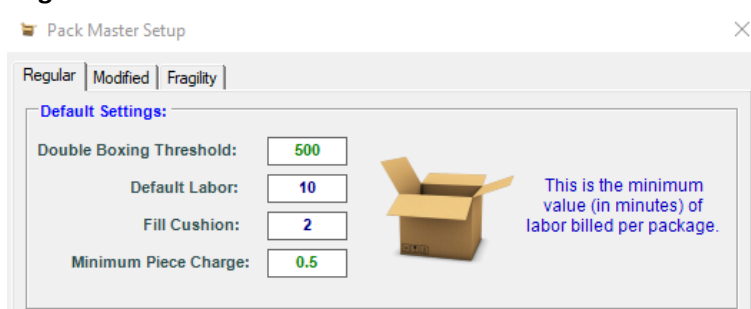


If there is no PackMaster button present in the POS button panel, then it can easily be created by clicking on an empty POS button. The POS Button Maker will display.

Select the “Pack Master” option in the bottom left hand side, pick a button color, and click the Save button in the top left. A new Pack Master button will now be available on the POS button panel.

Click on the newly created PackMaster button in the in the POS to open up PackMaster. Once in the PackMaster click the “Setup” button on the bottom. The PackMaster Setup has 3 tabs that need to be set up:

1. Regular:



Double Boxing Threshold – Any packing item that has a \$ declared value higher then this threshold will automatically be double boxed.

Default Labor – The minimum number of minutes that can be billed for a pack job. A user will not be able to adjust the labor below this amount during a packing quote.

Fill Cushion – The amount of space (in inches) left for fill between the wall of the box and the actual item. For example: a 2” fill cushion will leave 2 inches on each side of the packed item. If the item has the size 10x10x10, then with a 2-inch fill cushion the smallest box that the PackMaster will select is a 14x14x14.

Minimum Piece Charge – When packing a job with multiple items in it, a \$ piece charge can be set to be charged per item packed.

2. Modified:

The PackMaster has the ability to modify a box by either building it up, cutting it down, adding a top, or telescoping it. The modified tab in the PackMaster setup allows for additional labor minutes to be added for each of those functions.

3. Fragility

This is the most important setup tab. The ShipRite PackMaster will display 5 different packing choices for each entered pack job. The fragility levels are arbitrary levels that are broken down by how fragile an item is. Starting from Not Fragile and going up to Extremely Fragile. The user can use their own discretion when setting up the levels to match the store packing policies.

To setup the fragility levels, in each of the 5 fragility columns set the appropriate parameters and SKU's that should be used. Here is an example setup:

The screenshot shows the 'Pack Master Setup' window with the 'Fragility' tab selected. The window contains a table with the following data:

	NOT		FRAGILE		EXTREMELY
Fill Cushion (inch):		0.5	1	2	3
Fill SKU:		PACK_LF	PACK_LF	PACK_LF	PACK_LF
Wrap (times):		1	1	2	3
Wrap SKU:		PACK_FW	PACK_FW	BUBWP	BUBWP
Labor (min):	5	8	12	15	25
Labor SKU:	PACK_LAB	PACK_LAB	PACK_LAB	PACK_LAB	PACK_LAB

The first "NOT" fragile column in the example would not get any filler or wrap and 0 fill cushion. For example, this would apply to shipping a basketball where an exact size box would be used without any packing materials. Only labor would be charged in addition to the box.

As we move to the right through the columns, the levels get more fragile and more fill cushion, filler, wrapping, and labor is added on.

Using the PackMaster

Now that the Packmaster is setup, we are ready to start using it. Click on the Packmaster button in the POS. Start in the top left corner in the "Object" area by entering in the weight, dimensions, and declared value (if applicable) of the item being packed. Use the TAB key on your keyboard to move through the fields. Once the object information is entered, the Packmaster will display the 5 different packing options based on fragility.

Determine how fragile the item being packed is, and which one of the 5 options is the best choice for

the current job. Even if none of the selections are an exact fit, select the closest one. All the packing parameters can be edited after a selection is made.

Weight and Dimensions of item being packed

Total weight of item and packing materials combined.

Dimensions of the selected box.

5 packing options based on fragility. Click the radio button to preview a selection. Click on "Select" to make the selection and proceed.

Pack Master III

OBJECT # 1 VALUE \$ **0**

WEIGHT lb **3.0**

Length **6** Width **6** Height **6**

PACKAGING PRICE \$ **6.78**

WEIGHT lb **4.1**

Single Box: L x W x H **8 x 8 x 8**

Dim W **4** L + G **40** Double Box

Object in Box Preview

PREVIEW **NOT FRAGILE** **DBL BOX**

3.14 MATERIALS: 0.50
3.8 lbs (act) LABOR: 1.65
2 lbs (dim) BOX: 6 x 6 x 6 0.99

NOT TOO FRAGILE

5.55 MATERIALS: 1.32
4.2 lbs (act) LABOR: 2.64
4 lbs (dim) BOX: 8 x 8 x 8 1.59

FRAGILE

6.78 MATERIALS: 1.23
4.1 lbs (act) LABOR: 3.96
4 lbs (dim) BOX: 8 x 8 x 8 1.59

VERY FRAGILE

9.93 MATERIALS: 2.39
4.8 lbs (act) LABOR: 4.95
11 lbs (dim) BOX: 14 x 12 x 10 2.59

EXTREMELY FRAGILE

18.04 MATERIALS: 6.29
7.4 lbs (act) LABOR: 8.25
25 lbs (dim) BOX: 16 x 16 x 16 3.50

After clicking the “Select” button for the chosen fragility level, then Reviewer and Workshop options will display. This allows the user to review the details of the pack job and change any of the preselected parameters.

The screenshot shows the Pack Master III software interface. It is divided into several sections:

- OBJECT # 1**: Shows weight (3.0 lb), dimensions (6x6x6), and value (\$0).
- PACKAGING**: Shows weight (4.1 lb), dimensions (8x8x8), and price (\$6.78).
- REVIEWER**: A table showing selected items:

SKU/PLU	Description	Qty	Unit Price	Ext Price
BX888	BOX, 8 X 8 X 8	1.0	\$1.59	\$1.59
PACK_LF	LOOSE FILL PACKING	0.1	\$0.45	\$0.05
PACK_FW	FOAM WRAP PACKING	1.5	\$0.45	\$0.68
PACK_LAB	PACKAGING LABOR	12.0	\$0.33	\$3.96
- WORKSHOP**: A section for adjusting quantities and adding notes. It includes a table with columns for SKU, quantity, and unit price, and buttons for 'SaveAsNew', 'Save', and 'Delete'.

Callout boxes provide the following instructions:

- Uncheck the Receipt View option to view formulas and calculations
- The Reviewer displays the individual SKU's selected and the corresponding quantities and pricing as they will appear on the POS Receipt.
- Save the current pack job by typing in a keyword and clicking "Save As New". Pull up an existing pack job by clicking on the drop down menu.
- Add notes/details when saving a pack
- Uncheck option to combine and total the packing materials onto 1 line on the POS receipt.
- Change SKU's or quantities for any of the pre-selected packing materials
- Press Apply, to complete the pack job and close the PackMaster.

Modified tab

The modified tab allows for a box to be either built up, cut down, add a top, and telescope.

The screenshot shows the 'WORKSHOP' interface with the 'Modified' tab selected. It includes a 'Contents Keyword' field, a 'Regular' tab, and a 'Modified' tab. Under '1. Select Box:', 'BX664' is selected, with dimensions L: 6, W: 6, H: 4. Under '2. Modify Selected Box:', 'Selected Box:' is BX664. The 'Modification' section has 'Build up' checked, 'Cut down', 'Add a top', and 'Telescope' unchecked. 'How much Build up:' is 1 inches, 'Add extra Labor:' is 5 minutes, and 'New Box Height:' is 5 inches. A 'Suggest Select Box' checkbox is also checked. At the bottom are 'Setup', 'Apply', and 'Exit' buttons.

The currently selected box is displayed, but can be changed to a different box if desired.

Check the Modification check box. In the example on the left the “Build Up” option is checked. Enter in how many inches the box is built up and type in the amount of additional labor minutes it took to charge.

The other modification options work similarly. Multiple modification options can be checked off and applied to the same pack job.

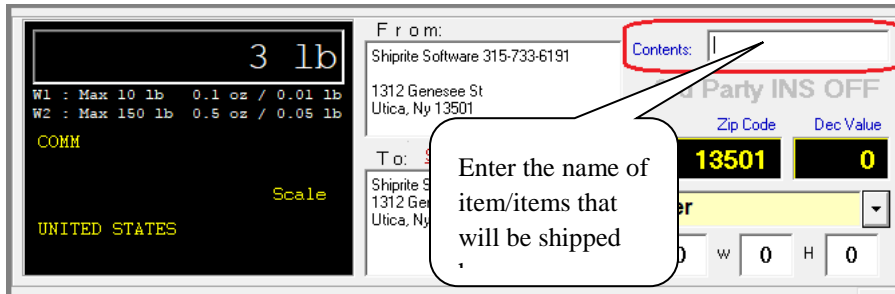
Once any changes to the predetermined pack parameters are completed, click the Apply button to close the Packmaster and have the packing charges transfer back to the current POS sale. If the “Print Details on Receipt” box is checked, all individual packing materials will be listed on the receipt. Uncheck that option to have all the packing supplies (box, filler, wrap) show as one line item. Labor will still show as a separate line item.

Combine Shipping and Packing

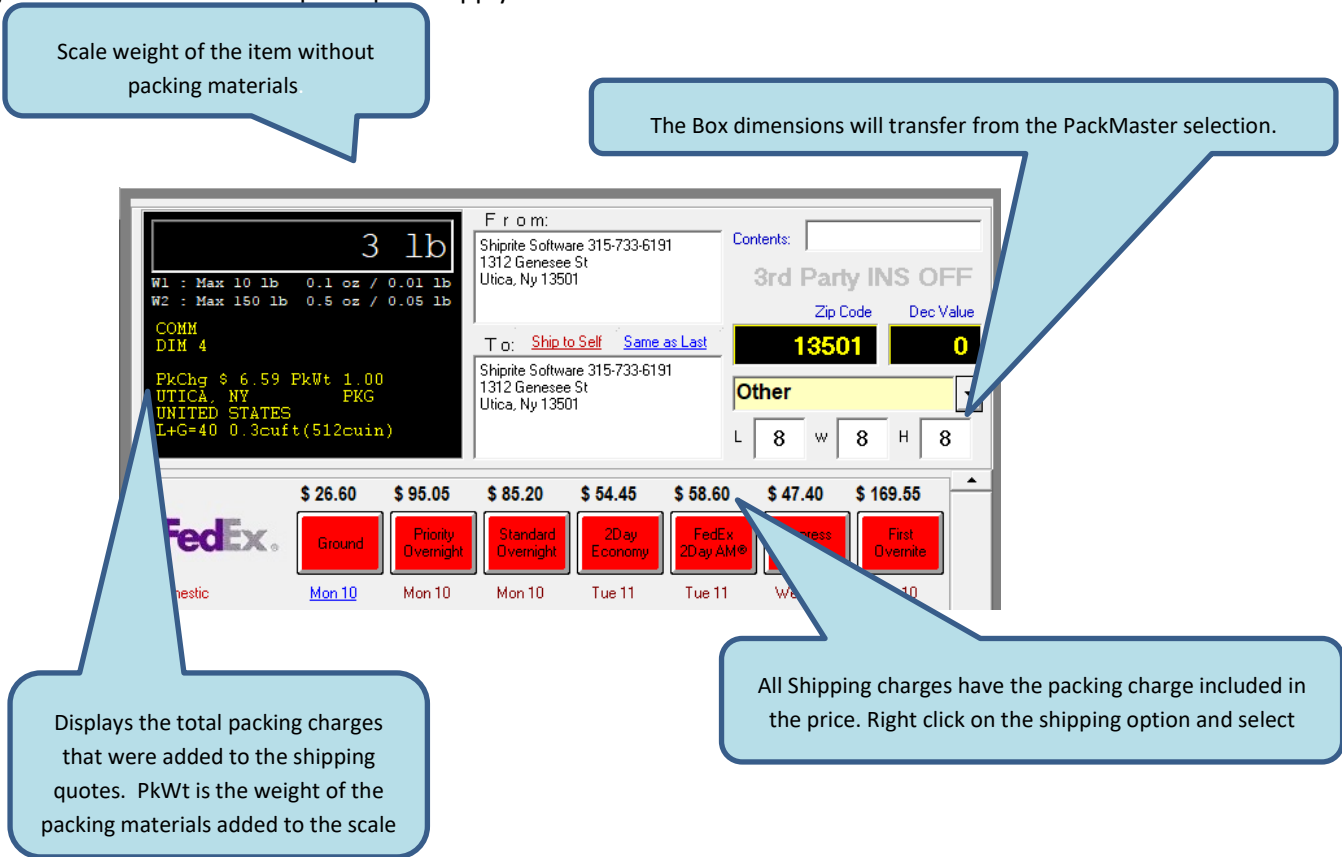
When accessing the PackMaster directly from the POS, the PackMaster charges for the packing materials and labor only. There is no shipment connected to it. Use this option to ring in a pack job that is not being shipped.

ShipRite has an option to access the PackMaster from the ShipOne screen in order to combine the shipping and packing charges. Once the ShipOne screen is opened, proceed to put the item that is being packed on the scale (if your scale is not connected to ShipRite, type in the weight of the item). Enter in the From and To addresses, then click in the Contents textbox in the top right corner.

The PackMaster is accessed through the contents textbox. If you have a saved pack job or want to save a new pack job, type in the name of it and press Enter. If it’s just a regular pack job that does not need to be saved, simply leave the contents field empty and press Enter.



Once Enter is pressed a Search list will appear listing all currently saved pack jobs. To pick one, simply select and press OK. To start a new pack job, click the ADD button on the top menu. The PackMaster screen will open. The current item weight will transfer over from the ShipOne screen. Type in the dimensions of the item being packed. Make a selection based on fragility. If necessary make adjustments in the workshop and press Apply.



In the above example, the item being packed weighs 3lb, however ShipRite will add the 1lb packing weight of all the pack materials and will price the shipping. The 8x8x8 dimensions are the dimensions of the box that was selected in the PackMaster.

The shipment can now be processed with the correct weight and dimensions without the physical packing of the item being done. ShipRite will produce the shipping label with tracking and after the POS sale is completed another 4x6 packing label will print with the packing materials and pack details. At this point, the item can be taken back of the store with the shipping and packing labels to be packed later on.

E. ZIP CODE

If you entered a TO contact, the zip code will already be here. If you want a price lookup without entering a FROM or TO contact, you can enter the destination zip code here and press TAB. Make sure you remember to check off RES for residential delivery and any other extras that apply (Declared Value, etc.).

F. DECLARED VALUE

It is not necessary to enter anything here if the value is \$100 or less. If the value is more than \$100, enter the value here in \$100 increments. For instance, if the value is \$175.00, then enter \$200. Press TAB.

G. DIM (DIMENSIONS)

Enter the length, width and height in inches. Remember to use the TAB key to move from field to field.

1. OVERSIZE

There are 2 levels of oversize. **OVS-1**. This is automatically detected if the parcel is LESS than 30 lbs and the length plus girth exceeds 84 inches. You may set this as oversize without putting in the dimensions by clicking on the oversize button on the right side. **OVS-2**. If the parcel is LESS than 70 lbs and combined Length plus Girth exceeding 108 inches, then the package will be billed at the 70 lb rate.

2. ADDITIONAL HANDLING

This is automatically detected if you enter any dimension in excess of 60 inches for Air and 48 inches for Ground. If you need to set an additional handling charge for a condition not related to the dimension, you can click on the ADDL HAND button on the right side.

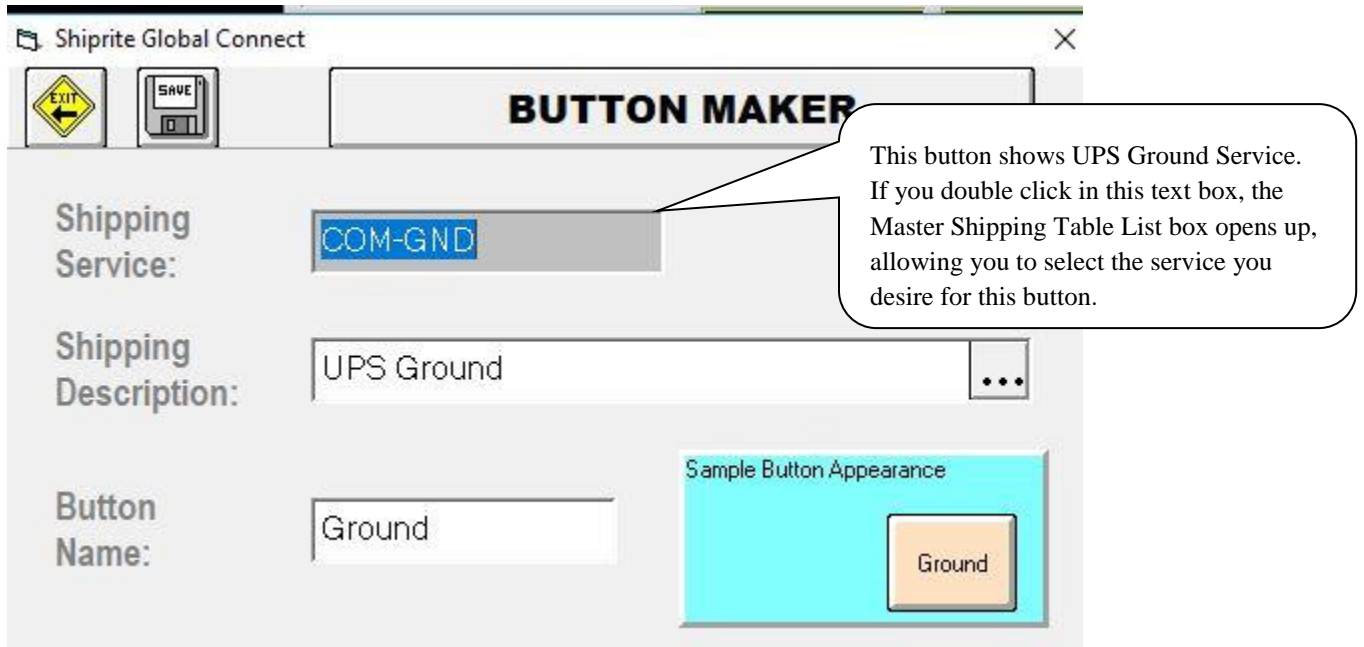
3. DIMENSIONAL WEIGHT

When the dimensions of the item are input, the ShipMaster will calculate whether the air shipments will be charged at a higher rate than rendered by just the weight. The actual weight is compared against the dimensional weight. The customer is charged the higher of the two. The formula for dimensional weight is length x width x height divided by 194 (or 166 for international).

H. GETTING READY TO SHIP

At this point all your buttons will have prices. Take the right button of the mouse and click on any button; lets say the UPS Ground button.

- ✓ Show Package Detail- This will show you a comparison of the cost vs. retail.
- ✓ Edit Button- ShipRite allows you to change the order in which the shipping buttons are displayed. Just enter the Button Maker and select the service you wish displayed here.



- ✓ Delete Button- This will remove this button from the ShipMaster form.
- ✓ Show /no Show Buttons- Each row has 7 buttons across. You may reveal the blank ones by clicking here. When you are done programming the buttons for your preferences, click on this again to hide the blank buttons.
- ✓ Edit Master Shipping Table-This is a short cut to the Master Shipping Table for editing on the fly. Please remember that you must restart ShipRite V10 to make the changes take effect.

I. SHIPPING OPTIONS

The pad on the right has 21 buttons with a combination of switches for optional services as well as some shortcuts.

1. DROP OFF

This is a shortcut button that takes you to the Drop Off Manager (you can also hit F5 and it will take you there) . Scan the package into the Tracking # Field and if “auto detect” is checked,

The screenshot shows the 'Drop Off Manager' window. It features several input fields and buttons. A callout points to the 'auto detect' checkbox, stating 'Auto detects the carrier.' Another callout points to the 'Print Receipt' and 'Email Receipt' checkboxes, stating 'Set up printer options here.'

Drop Off Manager

Enter Customer: Name:

Scan Label: Tracking#:

Clear Form Run Driver Manifest

UPS [web](#) USPS Other
DHL [web](#) FedEx auto detect **Next PKG**

Drop Off Package Options: Notes:

Packaging Fee: Set Compensation

Process & Save Options: Print Receipt Email Receipt

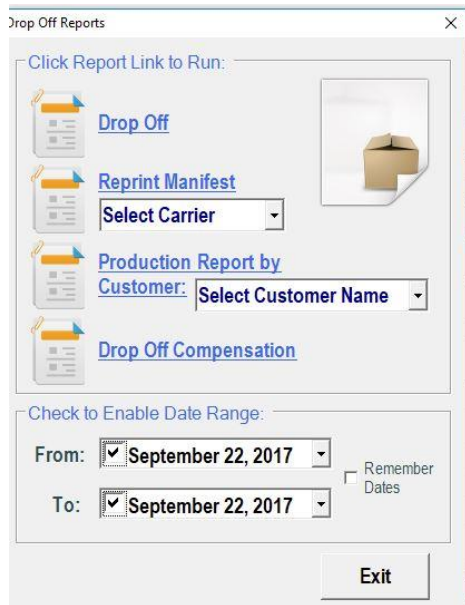
Process Status:

(Grd)	Carrier	Tracking#	Notes / Desc.	Fee
<input type="checkbox"/>	DHL	3971256952		0.00

Delete Selected Process & Save Reports Exit

The Drop Off Manager keeps track of all the drop off packages that come thru the store for all carriers. It allows for a disclaimer to be given to the customer either by printing or by email. It includes a web link to report UPS and DHL drop offs to the carrier. Scan the packages in the Tracking number field and if auto-detect is checked, the system will know which carrier. After all packages are entered, click Process & Save.

At the end of the day, you can print a manifest for the driver off all drop offs by carrier so that you have a record. You can also print reports



2. UPS

This is used to display the UPS logo next to UPS rates. Pressing this will make all other choices go away. Click it again to toggle back to all carriers and it will Hide the UPS logo but not the rates.

NTEP COC #05-019 Shiprite Global Connect Shipping Master



3. FLAT RATE FOR FEDEX

This button will display the Flat Rate prices for Fedex if the package meets the parameters for Flat Rate Pricing.

4. DAS

Click this button when instructed to do so by the carrier rep when shipping to remote areas. This will add the additional fees to the shipping total.

5. ENDICIA

This button must be on (green) in order for Endicia to apply postage to USPS shipments

6. TIME-IN-TRANSIT

Click this button to go to the carrier's website to get accurate date/time for the package to be delivered.

7. EMAIL

When this button is on (green), ShipRite will automatically email the tracking number to both the Shipper and the Consignee (if their email addresses were entered in their customer information).

8. DELIVERY CONFIRMATION

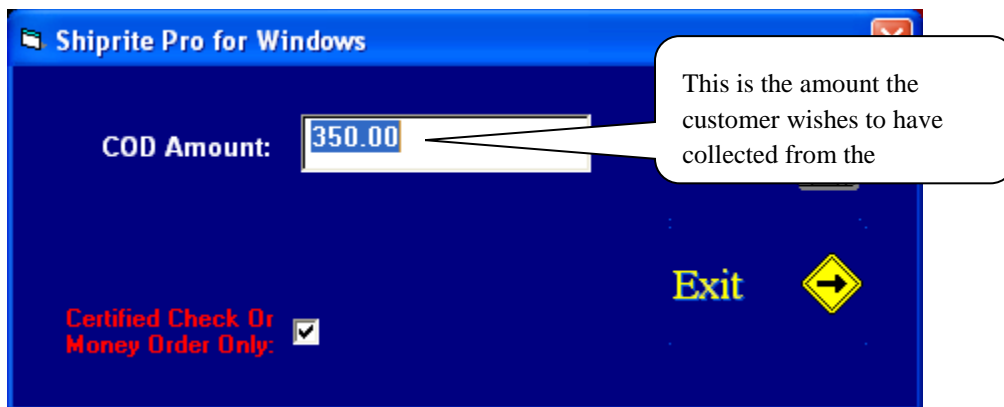
Click on this if the customer requests Delivery Confirmation. Delivery Confirmation tag must be filled in and stuck to the package.

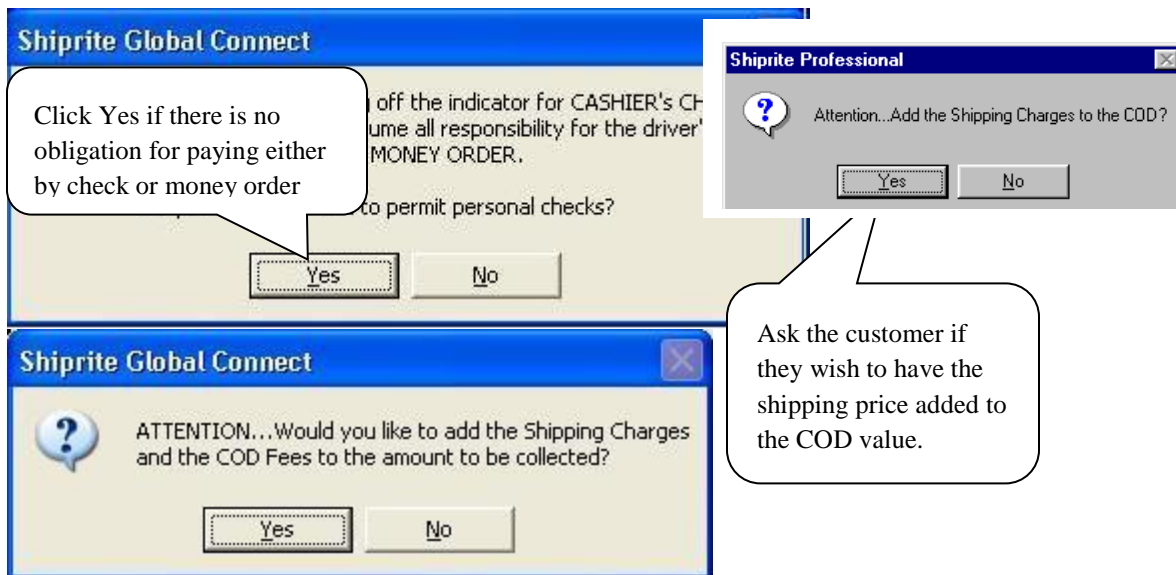
9. DELIVERY CONFIRMATION

Click on this if the customer requests an adult's signature to be obtained.

10. COD

This is for Collect on Delivery. Click on this option and the following window appears:





11. ADDITIONAL HANDLING

See [section above](#) dealing with dimensions.

This is a toggle switch. Click on it to set the shipment as a Residential Delivery. Click again to turn it off. When you do a price quote, the price will be defaulted to Residential.

12. RESIDENTIAL DELIVERY

This is a toggle switch. Click on it to set the shipment as a Residential Delivery. Click again to turn it off. When you do a price quote, the price will be defaulted to Residential.

13. SATURDAY DELIVERY

This is a toggle switch that click on it to set the shipment as a Saturday Delivery. Click again to turn it off. In order for the system to assess this charge, you should have previously set this service as having Sat Delivery available.

14. REPORTS

Click here to enter the shipping report generator. There are four different reports you can print or view. Select a single day, or a range of days. You may also directly select the pickup number for which you want a report.

Shipping Reporting

Shipping Reports

Starting Date:
09/01/2017

Ending Date:
09/13/2017

Pickup Number:

Carrier:
Federal Express

2017

September

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

Invoice Order

Zone Order

by Carrier Original

by Carrier Advanced

Insurance

- ✓ INVOICE ORDER: This prints the old UPS invoice order report.
- ✓ ZONE ORDER: This prints out all packages for the selected time period or pickup number.
- ✓ By CARRIER: This will give a listing of shipments by carrier.
- ✓ INSURANCE: This will list those items that had a value declared listed by carrier.

1 of 1+ 75% Total:23 100% 23 of 23

Invoice Order Report

ShipRate Demonstration Company
601 S. Main Street
N. Syracuse, NY 13212

Generated: April 17, 2000

PrintID	Tracking #	Date	ZIP	Zone	Lbs	Charge	DeclVal	DeclAmt	LT	RES	OVS	DIM	A/B	DA5
818179	1ZXXXXXXXXX0370000217	04/12/2000	04001	ZONE3	12.00	\$ 3.32								
818180	1ZXXXXXXXXX0170000220	04/12/2000	45001	ZONE106	1.00	\$ 14.25				X				
818181	1ZXXXXXXXXX0370000235	04/12/2000	10012	ZONE7	23.00	\$ 13.24				X				
818182	1ZXXXXXXXXX0370000244	04/12/2000	90210	ZONE6	12.00	\$ 23.13	300.00				X			
818183	1ZXXXXXXXXX0370000253	04/12/2000	12901	ZONE3	11.00	\$ 7.75								
818184	1ZXXXXXXXXX0370000262	04/12/2000	90601	ZONE6	12.00	\$ 7.17				X				
818185	1ZXXXXXXXXX0370000271	04/12/2000	90211	ZONE6	12.00	\$ 6.17								
818186	1ZXXXXXXXXX0370000280	04/12/2000	90211	ZONE6	12.00	\$ 7.17				X				
818187	1ZXXXXXXXXX0370000299	04/12/2000	90211	ZONE6	12.00	\$ 7.17				X				
818188	1ZXXXXXXXXX0370000306	04/12/2000	90211	ZONE6	14.00	\$ 24.13				X	X			
818189	1ZXXXXXXXXX0370000315	04/12/2000	04001	ZONE3	12.00	\$ 3.32								
818191	1ZXXXXXXXXX0370000333	04/12/2000	30301	ZONE5	12.00	\$ 13.58	150.00				X			
818192	1ZXXXXXXXXX0370000342	04/12/2000	33041	ZONE6	12.00	\$ 13.91	1,500.00			X	X			
818193	1ZXXXXXXXXX0370000351	04/12/2000	30301	ZONE5	23.00	\$ 9.96	150.00				X			
818194	1ZXXXXXXXXX0370000360	04/12/2000	19001	ZONE7	22.00	\$ 11.77								
818195	1ZXXXXXXXXX0370000379	04/11/2000	77001	ZONE3	3.00	\$ 3.43								
818196	1ZXXXXXXXXX0170000382	04/11/2000	10012	ZONE107	1.00	\$ 14.50	300.00			X				

✓

This button will become active if Stamps.com is enabled in the Set up under Options

16. CANADA

Clicking this button sets the carriers to Canada pricing. This feature is automatic if a Canadian address is entered in the Ship To box

17. LTR

This is a toggle switch. Click on it to set the shipment as an Air Letter. Click again to turn it off. This serves the same function as selecting Letter from the drop down box.

18. WORLD

When shipping international packages, enter the weight, and the shipped From address if desired. Tab to the TO field and click on World Button, this displays the list of all the countries, select the country name that the package is being shipped to. Enter last name or a company's name in the TO field, if this contact information is already in the database, it will pop up automatically. If it is not, Press Enter in the TO field that you can add new contact information for a shipper from Contact Manager but leave State and Zip code fields blank. In the Contact Manager Window, go to the drop down list at the top right and find the country name where the shipment is going.

19. UNITED STATES

This toggles back to United states as default if World was previously selected. Shiprite defaults to United States

20. CLEAR FORM

Clears all the data off the ShipMaster Screen to start again.

21. GO BACK

Returns you to the previous screen. This can be the POS screen or the Main Menu..

OPTIONAL SERVICES FOR HOME DELIVERY FOR FEDEX GROUND SERVICE

There are four options for FedEx Ground Service for Residential Address: Signature Home Delivery, Date Certain Home Delivery, Evening Home Delivery and Appointment Home Delivery. After all of details of a package being shipped in the Ship Master screen are filled in, click on the FedEx Ground Service button, and the FedEx Home Delivery Premium Services screen opens up. There are four additional options for home delivery along with the fees that are charged. You can select one or more of these options as it has been arranged between you and your customers. Click on the Continue button to complete the shipping procedure as usual.

Shiprite Global Connect Package Processing

FedEx Home Delivery Premium Services

Customer Charge: \$24.84

- Signature Home Delivery** \$ 4.00
Use this option when you want us to leave the package only when a signature can be obtained from someone at the delivery address.
- Date Certain Home Delivery** \$ 6.00
Use this option if your recipient wants to specify a certain date of delivery. This can be Tuesday through Saturday, excluding holidays. This date cannot be before the standard transit time, and must be no later than two weeks after the standard transit time.
- Evening Home Delivery** \$ 14.00
This is a great option if delivery must be done in person and your recipient is gone during the day. Use this option if your recipient wants to specify delivery between 5 pm and 8 pm on the scheduled day of delivery.
- Appointment Home Delivery** \$ 30.00
If your recipient needs to arrange for a specific date and time for delivery, this is the perfect option. We will contact the recipient by phone in advance of delivery to schedule a delivery time.

[Continue](#) 

[Cancel](#) 

After signature options are selected (if nothing is selected, it will default to No Signature). Click Continue to print the label. Click on the Green Go Online now button to print the label. Shiprite will go out to the carrier's website and pull in the tracking number. The tracking number will be on the label and the customer's receipt.

SmartSwiper Package Processing

F1 - Handle With Care F2 - Fragile Glass F3 - Heavy Package F4 - Expedite Please Rush F5 - Custom Label

Print labels for the package by using the appropriate Function key, if desired.

<p>From: 315-555-1212 Mark Ford Shiprite Software 924 Chaps Circle Henderson, NV 89002</p>		<p>Shipment: 13SEP17 ActWgt: 5.0 LB CAD: 1243566/WSX12150 Account#: S***** Dims: 5x5x5 IN</p>	<p>Go Online Now</p> <p>Thermal Batch Label</p> <p>Manual Label</p> <p>Go Back</p>
<p>SHIP TO: BILL 315-733-6191 Mark Ford Shiprite Software 1312 Genesee St Utica, NY 13502</p>	<p>Delivery Address Bar Code</p> 	<p>Ref # PID: 011101 Invoice # PO # Dept #</p>	
 <p>No Signature Required</p>	<p>TRK# 0201</p> <p>GROUND</p> <p><input type="checkbox"/> Non-Standard Container</p> <p><input type="checkbox"/> Dry Ice: 0 KG</p> <p><input type="checkbox"/> Hold At FedEx Location</p> <p>Address</p>		

Function keys at the top of the screen will allow you to print labels to go on the package.

10. MAILBOX MASTER

The screenshot displays the Mailbox Master software interface. At the top, there are navigation buttons: GO BACK, CLEAR, RENT, and PRINT. A printer icon is also present. The current mailbox is identified as 'Small Boxes 120-140' with the number '124' displayed prominently. The total cost is '\$ 53.00' and the key deposit is '\$ 5.00'. Below this, there are tabs for Contract, Home, Forwarding, Officers, and History. The main content area is divided into several sections: 'Mailbox Customer' with contact information for Jones, Mary; 'Additional Names' (currently empty); 'Contract' section with 'Rates' (1 month to 12 month) and 'Options' (Free months, Start Date, End Date, Key Deposit, Late Fee, Admin Fee, Pro-rate To Next Month). On the right, a 'Mailboxes' list shows a hierarchy of boxes (Large, Medium, Small) and individual mailbox numbers (121-137) with associated names and dates.

ShipRite's Mailbox Master module has several unique features:

- Unlimited amount of Mailboxes and Sizes
- Unlimited amount of Rental fees
- Each box can have a separate fee schedule for Residential or Commercial.
- Unlimited Additional Names for each mailbox.
- One customer can have multiple mailboxes rented.
- Alpha listing includes Primary name, company name and all additional names
- Prorate rentals to the end of the month.
- Automatically print rent Renewal, Expiration and Cancellation Notices
- Totally integrated with ShipRite POS.
- Allows for discounts or Free Months.

- Charge 3 different deposits: Key, Forwarding or Other
- Allows for DEBIT accounts.

ShipRite Global Connect v10 uses our unique Mailbox Master to manage rentals in your store. Before beginning to rent mailboxes, you must setup and load the boxes into the system.

IT IS HIGHLY RECOMMENDED THAT YOU LIST OUT YOUR MAILBOXES ON A PIECE OF PAPER TO MAP HOW YOU WILL ENTER THEM IN THE SYSTEM. NEXT DECIDE HOW YOU WANT THEM TO BE LISTED. CHOOSE CAREFULLY WHEN YOU ENTER YOUR MAILBOXES. IT IS DIFFICULT TO UNDO THE MAILBOXES ONCE THEY ARE ENTERED. YOU MUST ALSO GO INTO DEPARTMENT SETUP (Chapt 2 p.10) and verify there is a department labeled MAILBOX set as non-taxable if there is not you will need to create a department called MAILBOX (not MAILBOXES, or YOU GOT MAILBOXES or any other naming convention). Your entire mailbox related sales should have MAILBOX for dept.

A. SETUP

To start the setup procedure, from the Main Menu, go to Actions: Table Management: MAILBOX SETUP. There are 3 tab controls: General, Agreement and Re-Initialize.

1. **GENERAL.** You should get a list of your mailboxes and the rental fees you wish to charge. You should enter them in the top panel of this form.

Description	Starting Number	Ending Number	1 Month	3 Month	6 Month	12 Month
Large Boxes 100-104	100	104	\$29.00	\$28.00	\$27.00	\$26.00
Medium Boxes 105-119	105	120	\$24.00	\$22.00	\$20.00	\$18.00
Small Boxes 120-140	120	140	\$18.00	\$16.00	\$15.00	\$14.00

Tab off to the right to input pricing for Business mailbox rentals, B1, B3 etc →

Key Deposit SKU: DEP_KEY (Always Charge Key Deposit) Days to Print Renewal: -14 Renewal Message: Time to renew your mailbox rental. Please come to the counter and settle.

Other Deposit SKU: DEP_OT Days to Print Expiration: 0 Expiration Message: Your mailbox rental has expired. Please come to the front counter in order to avoid a service interruption.

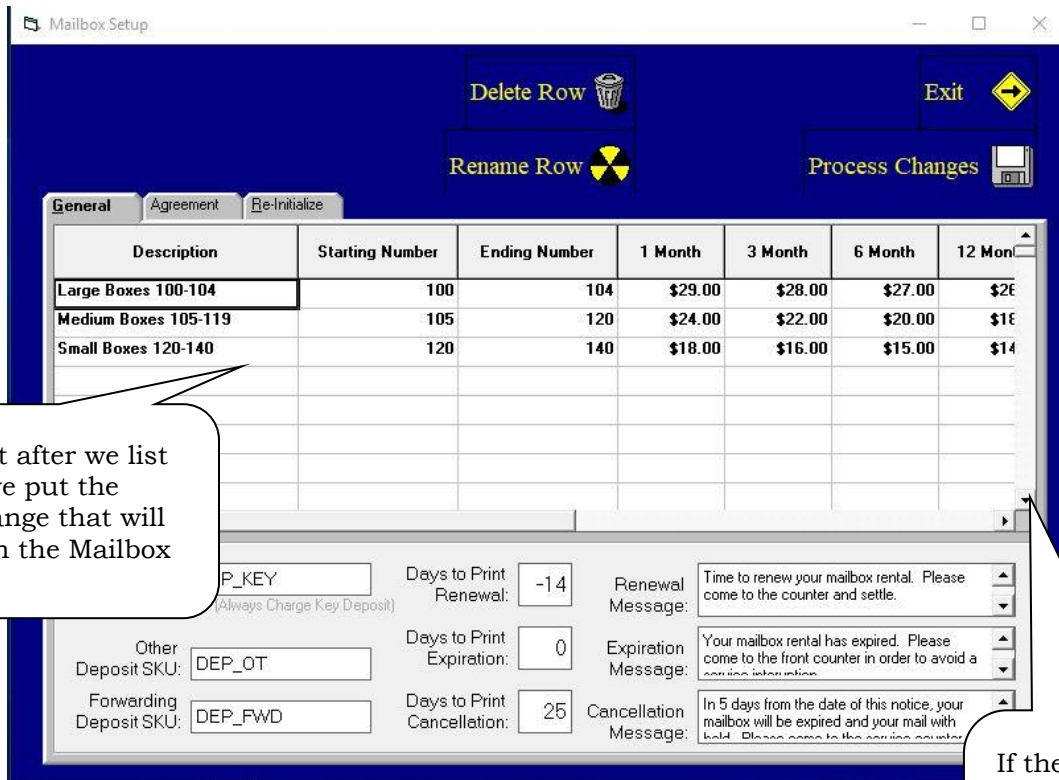
Forwarding Deposit SKU: DEP_FWD Days to Print Cancellation: 25 Cancellation Message: In 5 days from the date of this notice, your mailbox will be expired and your mail will hold. Please come to the service counter.

WARNING. Once you have setup your Mailbox Descriptions and click PROCESS CHANGES, don't change them. Make sure you get it right the first time.

In the example above, we have loaded 2 different mailbox sizes. You may call them anything you want. We have named them Personal and Corporate for demonstration purposes. You have 2 sets of pricing for each mailbox: Residential (1mth, 3mth, etc..) and Commercial (B1mth, B3mth, etc...) The prices shown above are PER month. For example, if you are going to charge \$120.00 for a 12mth rental – you would divide \$120.00 by 12 = \$10.00. This is the dollar amount you will enter in the 12 month field. There is NO limit on the number of mailbox descriptions.

a). Mailbox Number Setup

You should choose how you list your mailboxes carefully. You will have to live with it once you decide. This example shows how to set up a simple list of mailboxes where all the corporate in a single range (201-225), same for the Personal. Our examples don't show Drawer size or other, but the concept is the same.



B). DEPOSIT SETUP

You may have 3 different types of deposits. You will see the pre-determined SKU's located in the Deposit fields. Verify through the INVENTORY MASTER the following SKU's exist:

DEP_KEY – Key deposit SKU

DEP_OT – Other deposit SKU

DEP_FWD – Forwarding Deposit SKU

If these SKU's do not exist you will have to add them to the Inventory setup as described in Chapter 2. They must be added EXACTLY as seen in the list above and placed under the MAILBOX Department

C). NOTICE SETUP

You may set the days to print the 3 notices. Day 0 is the day the mailbox actually expires.

- **Days to Print Renewal:** The purpose of the Renewal Notice is to alert your box holder that their mailbox WILL expire on a certain day. This is usually a negative number. In the example above, -

14 means the notices will be due to print 14 days before the rent expires. Put the printed notice in the customers' box when printed.

- **Days to Print Expiration:** This is usually zero. Notice prints on the day the box expires.
- **Days to Print Cancellation:** This is a positive number. This represents the last warning message the expired customer will get.

At that bottom of each Notice printed you are allowed to put your own customized message. Some like putting relatively friendly notices for the first notice, and getting firmer with the later notices. The message will depend on what notice is being generated.

2. RENTAL AGREEMENT.

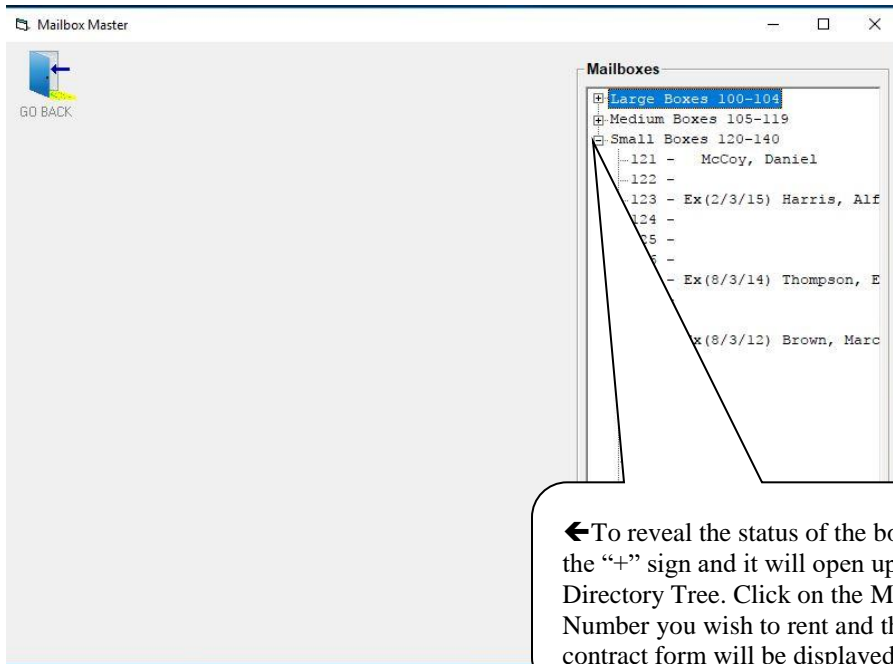
Click on the RENTAL AGREEMENT tab. You may edit this agreement freely. If need be, copy the entire agreement and PASTE into Windows NOTEPAD and then edit the text there. Then PASTE back into this area. Click PROCESS CHANGES when done.

3. **Re-Initialize.** Only use this feature if you are directed to by SHIPRITE SUPPORT.

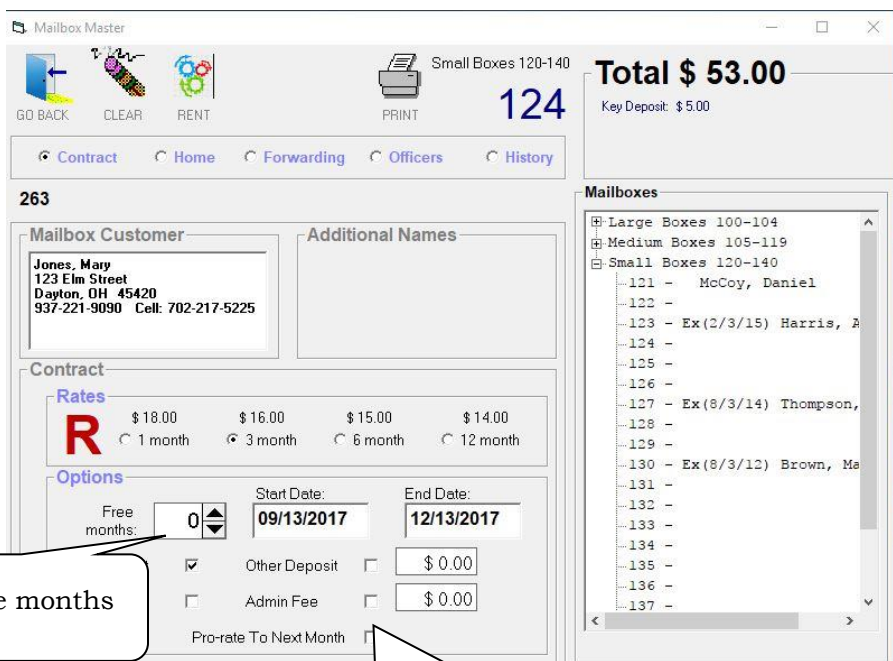
B. RENTING MAILBOXES (DURING SETUP)

When you first start using the Mailbox Master, you will most likely be moving customers into the system from another, unless you are opening a new store. If you are going to use the POS and Shipping portion of this software you MUST rent mailboxes through the POS system. Enter the POS, go to Customer lookup, locate the customer or add as new if needed. Once the customer has been loaded through the POS, right mouse click the customer name and choose review customer account. ShipRite will automatically add the Mailbox holder as an Account Customer so Forwarding Deposits and other deposit information may

be tracked. Once you selected the customer, click on the Mailbox Rental button and Mailbox Rental. This will bring you into the Mailbox rental module. If you have setup your mailboxes as described in Section A thru D above, you will see a tree of Mailboxes listed by description or size. To open the bank of mailboxes, you just click on the '+' signs. A listing of the mailboxes with the names of the primary mailbox holder will be listed beside the corresponding mailbox. If the box is not rented, there will be no name associated with the box. Select the desired mailbox from the directory tree. When you click on the desired mailbox number, the data entry form will appear on the right with the customer detail pre-filled.



We are going to select Box #124



1. PRO-RATING TO

Prorate to the next month will make the End Date 12/31/2017

Some storeowners want all their boxes renewing at the end of the month. You can click on the Pro-rate to Next Month and the Customers' bill will be adjusted to the end of the current month and the expiration date will be set to the last day of the month at the end of the rental period.

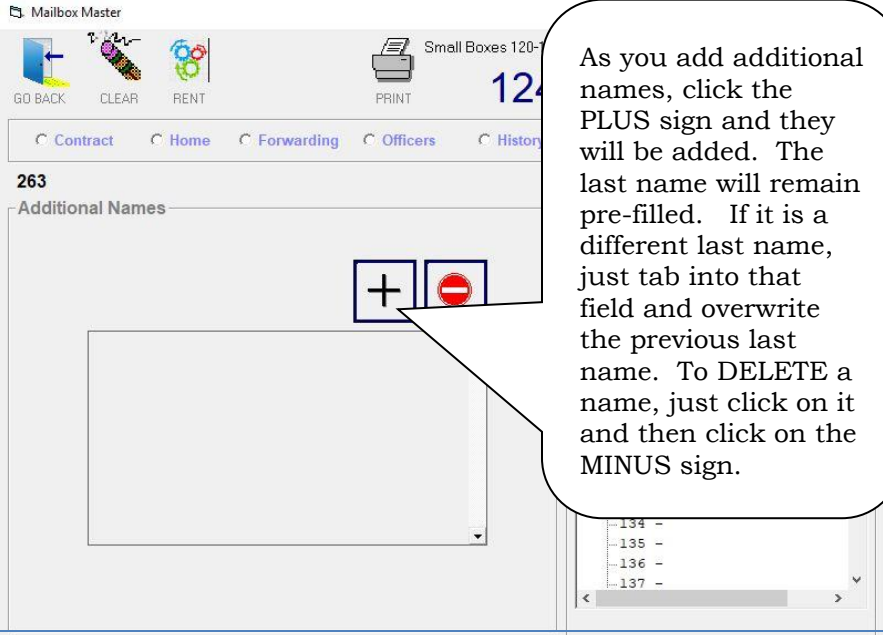
2. FREE MONTHS

The Start Date is defaulted to today's date. You may change it in the proper spot. The format for the date MUST be mm/dd/year.

To give a premium such as a free month, using the up and down arrows, select a number of free months in the box next to the Start Date. Then select your rental term, i.e. 3 months, 6 months, 12 months. The END DATE will automatically be updated.

3. ADDITIONAL NAMES

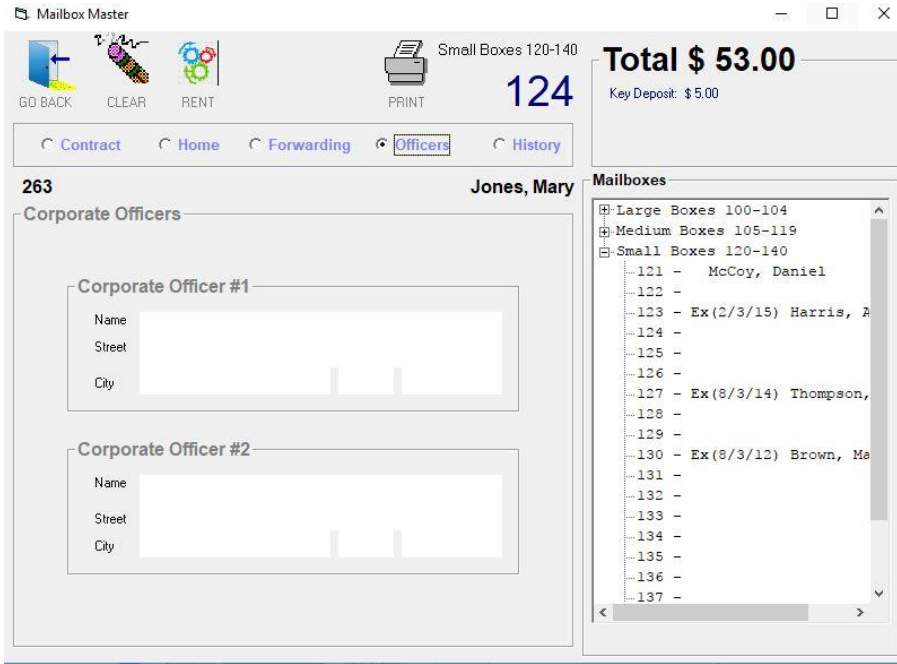
Once you input the above data, you can finish the rental, or enter additional data if needed:



As you add additional names, click the PLUS sign and they will be added. The last name will remain pre-filled. If it is a different last name, just tab into that field and overwrite the previous last name. To DELETE a name, just click on it and then click on the MINUS sign.

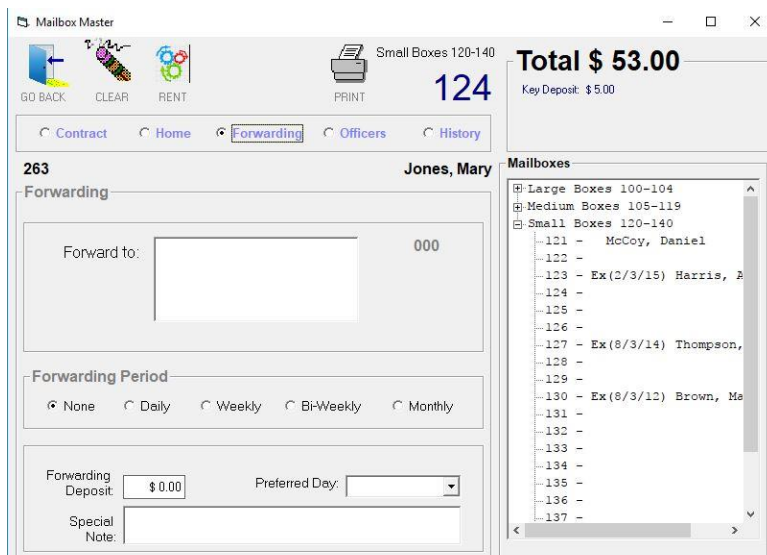
4. CORPORATE OFFICERS:

This is an optional form to capture the names of officers of the company. The USPS requires 2 officers to be entered into the 1583.



There is no SAVE button since the database is updated as you enter your data.

5. FORWARDING ACCOUNTS:



If the customer requires the mail to be sent to another address, you will have to fill in the address to forward to. You will also need to select the frequency. The Forwarding Deposit amount that you previously input will pop in as soon as you select a frequency. You may change this amount if desired.

6. FORMS OF ID AND PRINTING PS1583 AND RENTAL CONTRACT



Click on the RENT icon and the Printing Form will open. All data entered while renting the mailbox will be merged to the USPS 1583 form as well as the Mailbox Rental Agreement.

The screenshot shows a window titled "Printing" with the following elements:

- Two checked checkboxes: **USPS 1583 Form** and **Rental Agreement**.
- Three buttons: **CONTINUE** (with a yellow arrow icon), **NO PRINT**, and **CANCEL**.
- A yellow highlighted section titled "Required Information for Printing 1583" containing:
 - A label "Type of Business:" followed by a text input field.
 - A label "2 Forms of ID:" followed by two numbered text input fields (1) and 2).

Two callout boxes provide instructions:

- The first callout points to the "CONTINUE" button and contains the text: "Enter the Type of business. If personal, enter PERSONAL. If commercial, enter the type of business: eg. SOFTWARE".
- The second callout points to the "2 Forms of ID" input fields and contains the text: "Enter 2 forms of ID as required by the US Postal Service."

After you have filled in this form, click CONTINUE. At this point you will be asked to PREVIEW or PRINT the 2 reports. Don't worry, if you select PREVIEW, you will still be able to print from the PREVIEW window. If you preview, and it looks like you just returned to the program, but could briefly see the reports, look on your Windows Task Bar (usually on the lower edge of the screen). You will see the Crystal Report icon twice. Just click on each to maximize them as seen below:

7. MAILBOX AGREEMENT

Mailbox Rental Agreement 124

September 13, 2017 at 03:14 PM by and between Mary Jones, hereinafter and ShipRite Demo Las Vegas, hereinafter referred to as "Mail Service", giving terms to which each party agrees for the period beginning on 11-13-2018, upon termination of this agreement.

Name: Mary Jones
PMB#: 124
Physical Address: 123 Elm Street Dayton, OH 45420
Phone: 937-221-9090
Cell Phone: 702-217-5225
Email Address: theresa@shipritesoftware.com

Articles of the Agreement

U.S. PMB RENTAL AGREEMENT
The Applicant and Mail Service may collectively be referred to as the "Parties" throughout this Agreement. The Parties hereby agree to the following:

TERMS AND CONDITIONS

1) Mail Service/Applicant Relationship: Applicant understands that the relationship of the Parties hereto is one of bailment and not landlord tenant. By signing this Agreement and completing USPS Form 1583, a copy of which will be made available by Mail Service to the United States Postal Service (USPS), Applicant appoints Mail Service as an agent for the receipt of mail during the term identified above. Applicant is expected to pick up mail at least once each month or make other suitable arrangements in advance with Mail Service. Applicant shall be provided with 1 (one) key

Report Viewer toolbar: You can click this arrow to view the 2nd page before printing.

Printer icon: You can print this after the preview by clicking on the printer icon

Current Page No.: 1 | Total Page No.: 3 | Zoom Factor: 100%

9. USPS FORM 1583

Report Viewer

SAP CRYSTAL REPORTS®

Main Report

United States Postal Service

Application for Delivery of Mail Through Agent

See Privacy Act Statement on Reverse

1. DATE **09/13/2017**

In consideration of delivery of my or our (firm) mail to the agent named below, the addressee and agent agree: (1) the addressee or the agent must not file a change of address order with the Postal Service upon termination of the agency relationship; (2) the transfer of mail to another address is the responsibility of the addressee and the agent; (3) all mail delivered to the agency under this authorization must be prepaid with new postage when redeposited in the mails; (4) upon request the agent must provide to the Postal Service all addresses to which the agency transfers mail; and (5) when any information required on this form changes or becomes obsolete, the addressee(s) must file a revised application with the Commercial Mail Receiving Agency (CMRA).

NOTE: The applicant must execute this form in duplicate in the presence of the agent, his or her authorized employee, or notary public. The agent provides the original completed signed Form 1583 to the Postal Service and retains a duplicate completed signed copy at the CMRA business location. The CMRA copy of PS Form 1583 must at all times be available for examination by the postmaster (or designee) and the Postal Inspection Service. The addressee and the agent agree to comply with all applicable postal rules and regulations relative to delivery of mail through an agent. Failure to comply will subject the agency to withholding of mail from delivery until corrective action is taken.

This application may be subject to verification procedures by the Postal Service to confirm that the applicant resides or conducts business at the home or business listed in boxes 7 or 10, and that the identification listed in box 8 is valid.

2. Name in Which Applicant's Mail Will Be Received for Delivery to Agent. <i>(Complete a separate Form 1583 for EACH applicant. Spouses may complete and sign one Form 1583. Two items of valid identification apply to each spouse. Include dissimilar information for either spouse in appropriate box.)</i>	3a. Address to Be Used for Delivery Including ZIP+4 Jones, Mary 924 Chaps Circle PMB 124		
Jones, Mary	3b. City Henderson	3c. State NV	3d. ZIP + 4 89002
4. Applicant Authorizes Delivery to and in care of a. Name ShipRite Demo Las Vegas	5. This Authorization Is Extended to Include Restricted Delivery Mail for the Undersigned(s)		

Current Page No.: 1 Total Page No.: 1+ Zoom Factor: 100%

This is the second report that is generated. It is your properly filled in USPS form 1583. You can print the form by clicking on the Print icon on the Report control bar. You can print as many copies as you need. You need one copy for each name on the mailbox. Close these reports by clicking the X on the top right of the Window.

After you have finished your rental, you will be returned to the ShipRite POS. Finish your transaction and complete the sale as you normally would. The receipt will reflect the mailbox number, the term of the rental, any free months and the expiration date

Point of Sale: Simple Cash Register

File Edit Sales Actions Print Administration PL

ShipRite Demo Las Vegas
924 Chaps Circle
Henderson, NV 89002
315-555-1212

Inv#:New Sale 09/13/2017 15:03

Cash, Check, Charge
Jones, Mary

Description

SKU#	Price	QTY	ExtP
3 month Box #: 124			
MBX	48.00	1	\$ 48.00
Mailbox Key Deposit			
DEP_KEY	5.00	1	\$ 5.00
1 Free Month(s)			
Expire Date: 01/13/2018			

C. RENTING FROM THE MAILBOX MANAGER:

If you have not purchased the POS and Shipping portion of the software, OR if you are entering Mailbox customers that have already paid, you will enter the Mailbox Manager from the main Shiprite Menu, under Actions. Select Mailbox Manager. Select the mailbox on the right that you wish to rent, enter the mailbox holder's information. Please refer to [section B](#) to complete your mailbox rental.

D. RENEWALS:

Mailbox Master

GO BACK RENT PRINT Medium **Total \$ 216.00**

Contract Home Forwarding Officers History

12270

Mailbox Customer	Additional Names
Johnson, Marty 123 Elm Street Omaha, NE 68135 402-222-1212	Johnson, Susi

Mailbox Renewal

Contract

Rates

R	\$ 22.00	\$ 22.00	\$ 20.00	\$ 18.00
<input type="radio"/> 1 month	<input type="radio"/> 3 month	<input type="radio"/> 6 month	<input checked="" type="radio"/> 12 month	

Options

Free months:

Start Date: End Date:

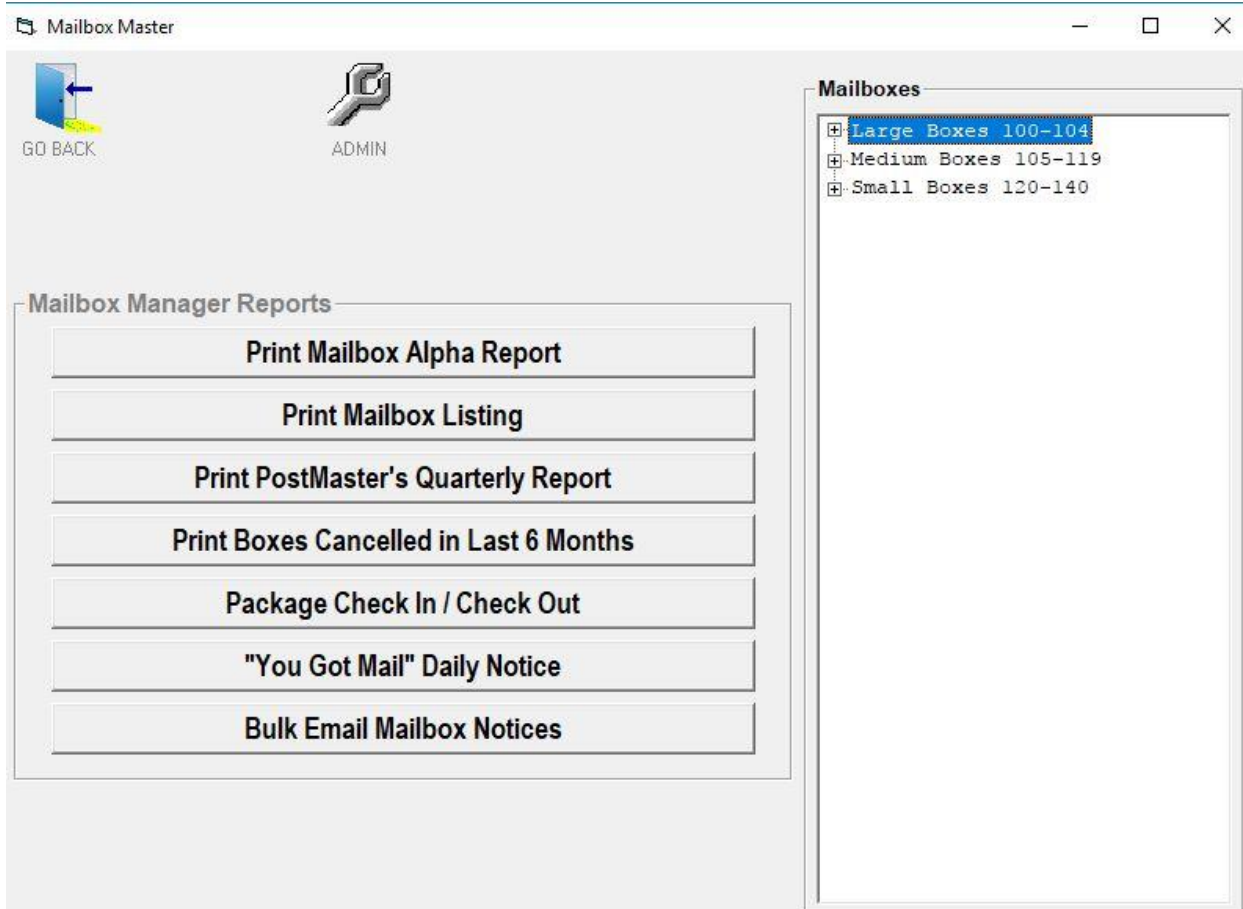
To renew a customer that wishes to extend their contract, enter the name in the POS as normal. Then click on the Mailbox Rental button, click on Mailbox Renewal. You will then enter the familiar contract screen with all the old data entered. To renew the box, select the number of months desired. Since this is a renewal, you will probably not need a key deposit. You will be able to enter any other data that has changed. When you have entered all the data and are ready to finish, click RENT and you will get the Printing Window with the Type of Rental and 2 forms of ID. Click NO Print when these are all set and you are ready to finish.

E. MAILBOX MAINTENANCE

Sometimes you will need to go into the Mailbox Program to fix a problem or make an adjustment. You may need to change a start date of the rental, or the end date, change the number of months selected, or print reports. To perform a maintenance change, go to ShipRite Main screen, Actions, choose Mailbox Maintenance.

F. PRINTING LISTS

When you first enter MailBox Manager from the main Shiprite menu under Actions, you will have the opportunity to print several different reports.



1. ALPHA LISTING:

1 of 1+ 100% Total:18 100% 18 of 18

ShipRite Softwa
6780 Northern Blvd. Ste 3
E. Syracuse, NY 13C

Mailbox Alpha Listing

B

Name	MBX#	Address	City, State, and Zip	Phone	Start	End	Cancel
Beers, Bill	131	399 Sheep Blvd	San Diego, CA 92111	619-993-2828	03/10/2001	09/10/2001	
Boyd, Jimmy	131				03/10/2001	09/10/2001	

C

Name	MBX#	Address	City, State, and Zip	Phone	Start	End	Cancel
Capone, Alphonse	109				03/10/2001	10/01/2001	
Crygg, Bill	100	939 Phil St	West Palm Beach, FL 33401	561-938-2833	03/10/2001	09/10/2001	

J

Name	MBX#	Address	City, State, and Zip	Phone	Start	End	Cancel
Jones, Jenny	104	8884 Anywhere St	Eustis, FL 32727	352-452-5665	03/10/2001	09/03/2001	
Jones, John Paul	104				03/10/2001	09/03/2001	
Jones, Quincy	104				03/10/2001	09/03/2001	

N

Name	MBX#	Address	City, State, and Zip	Phone	Start	End	Cancel
Nelson Litho	100	939 Phil St	West Palm Beach, FL 33401	561-938-2833	03/10/2001	09/10/2001	

O

Name	MBX#	Address	City, State, and Zip	Phone	Start	End	Cancel
------	------	---------	----------------------	-------	-------	-----	--------

This is a listing of all the customers AND their additional names in alphabetical order crossed reference by mailbox number. This is the same report that is printed for the PostMaster 4 times a year. That report will also have the renters who expired during the last 6 months.

2. MAILBOX LISTING:

This report shows each box you have and the STATUS of the box:

Report Viewer

SAP CRYSTAL REPOF

Mailbox Listing

ShipRite Demo Las Vegas
924 Chaps Circle
Henderson, NV 89002

MBX#	Rented	Rented by	Start Date	Expire Date	Business	Type of Business
100	Yes	Murphy, Mary	05-09-2017	11/09/2017	No	
101	No				No	
102	Yes	Whitley, Theresa	08-23-2017	11/23/2017	No	
103	No				No	
104	No				No	
105	No				No	
106	Yes	Starr, Theresa	09-11-2017	12/11/2017	No	
107	No				No	
108	No				No	
109	Yes	Williams, John	02-03-2012	08/03/2012	No	
110	No				No	
111	No				No	
112	No				No	
113	No				No	
114	No				No	
115	No				No	
116	No				No	
117	No				No	
118	No				No	
119	No				No	
120	No				No	
121	Yes	McCoy, Daniel	08-22-2017	11/22/2017	No	
122	No				No	
123	Yes	Hamis, Alfred	02-03-2012	02/03/2015	No	
124	Yes	Jones, Mary	09-13-2017	01/13/2018	No	
125	No				No	

3. POST OFFICE QUARTERLY:

This report is run every quarter to give to the postmaster. The mailboxes are broken down alphabetically.

Shiprite

Post Office Quarterly

D

Name	MBX#	Address	City, State, and Zip	Phone	Start
Durdington, Jessica	134	302 College Ave, Apt 2	Ithaca, NY 14850	607-272-6947	

F

Name	MBX#	Address	City, State, and Zip	Phone	Start
Ford, J. Mark	202	333 West St	Utica, NY 13501	315-335-2424	02/22
Ford, J. Mark	202				02/22

This report is required by the post office to be submitted with the Post Office Quarterly Report. Enter the dates you want for this report (last 6 months) and click Print

Report Dates

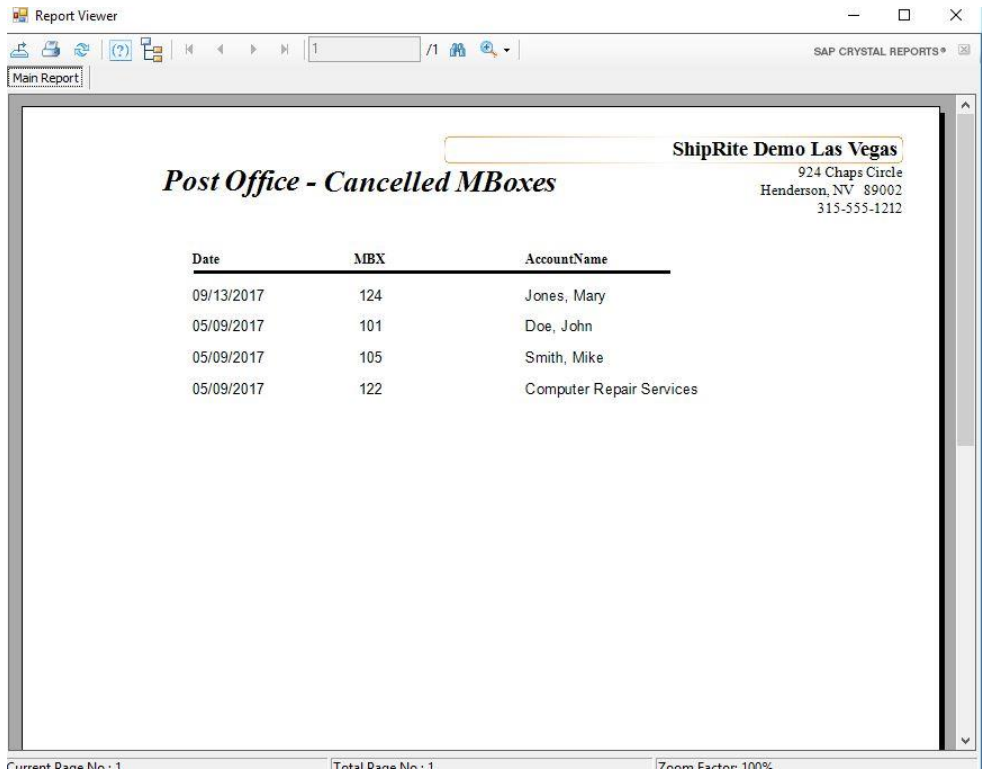
Starting Date: 03/01/2017

Ending Date: 09/13/2017

Print

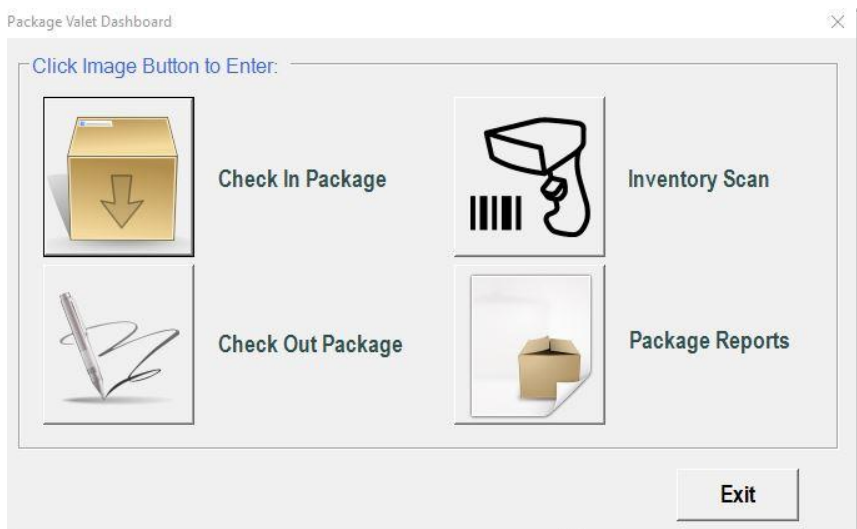
Cancel

2017						
March						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	



4 PACKAGE CHECK IN – CHECK OUT (PACKAGE VALET):

This option is for you to notify your mailbox holders if they receive any packages and to keep a record of the packages as they are checked out (or picked up). This feature can also be used for Non-Mailbox customers that you receive packages for, or for the Fedex HAL (Hold at Location) or the UPS Access Point programs.



A - PACKAGE CHECK IN :

Enter the mailbox number (or customer's name if not a mailbox customer).

Scan the tracking number. If you have 'auto detect' selected, ShipRite will automatically detect which carrier it is for.

You have the option to Print a Notice to put in their Mailbox, Print a Label to put on the box to identify who it is for, enter Notes as to the condition or other information about the package, Enter a location as to where the package is located so other clerks will know.

You can either print a Signature Sheet, Send a Text (SMS), or send an Email to the customer

Check In Package

Enter Mailbox: Number: 124 Clear Name: Jones, Mary Exp Date: 1/13/2018

Scan Label: Tracking#: 12131313132
 UPS USPS Other
 DHL FedEx auto detect Next PKG

Check In Package Options:
 Print Notice Notes: package dented on arrival
 Print Label Location: on top shelf

Process & Save Options:
 Signature Sheet
 Send SMS
 Send Email

Process Status:

Mbox	Carrier	Tracking#	Notes / Desc.	Location
124	DHL	12131313132	package dented o...	on top shelf


Delete Selected Process & Save Reports Exit

B – CHECK OUT PACKAGE

When the customer comes to pick up the package, click on Check out Package. Enter the customer's name or mailbox number and then List PKGs.

Check Out Package

Mailbox:
 Number:
 Name:
 Exp Date: 1/13/2018

Scan Label:
 Tracking#:
 Carrier: 
 Received:

Ready for Pickup (1):


<input checked="" type="checkbox"/>	Carrier	Tracking#	Date Received	Location	Notes / Desc.
<input checked="" type="checkbox"/>	UPS	1Z1140380199314444	9/13/2017		
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					

Signed By:
 Name: Notes:

Click on Pickup Checked Packages. If you have an electronic signature pad, the customer's signature will be displayed electronically as a permanent record that it was picked up.

Check Out Package

Mailbox:
 Number:
 Name:
 Exp Date:

Scan Label:
 Tracking#:
 Carrier: 
 Received:

Ready for Pickup (0)

<input type="checkbox"/>	Carrier	Tracki	es / Desc.
<input type="checkbox"/>			
<input type="checkbox"/>			

Signed By:
 Name: Notes:

Saved!

Saved!

Pickup was saved successfully!

C - INVENTORY SCAN:

This allows you to scan all the packages you have in inventory to keep an accurate record of what you have on hand and to see if you have packages that were not scanned into the system, or if you have packages on the list that you do not physically have, which could mean a clerk handed out a package without checking it out.

Package Inventory Scan

Choose Package Class and Scan Label:

Tracking#:

Non-Mailbox Packages UPS AP All Packages

Mailbox Packages FedEx HAL

show missing only show present only show both

Inventory:

[In]	Carrier	Tracking#	Date Received	Location	Notes / Desc.

D - PACKAGE REPORTS

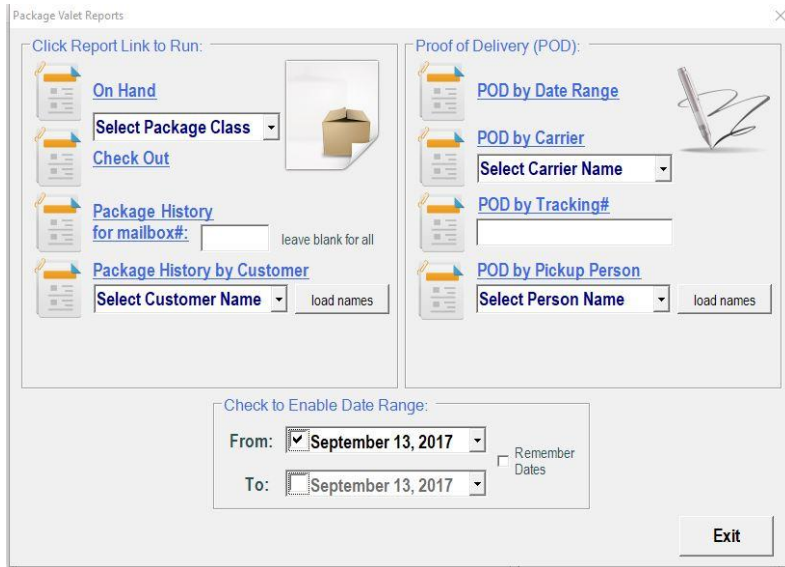
You can run several different reports as needed.

Packages On Hand

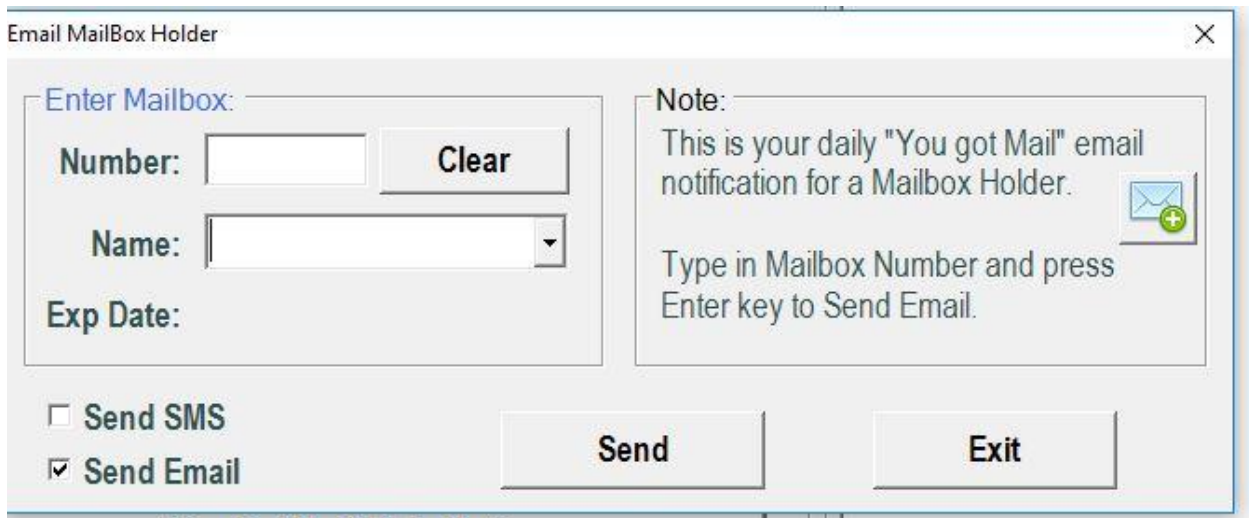
Package History by Mailbox #

Package History by Customer

Proof of Delivery Reports by Date, Carrier, Tracking or by Person Picked up.



5 “ YOU GOT MAIL” DAILY NOTICE

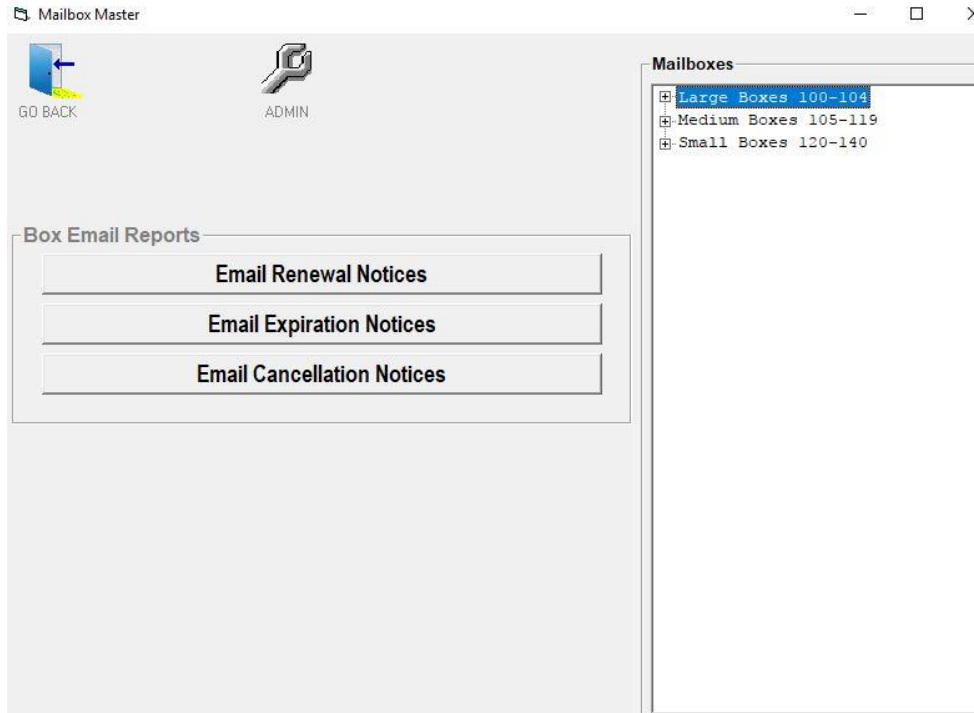


Open this screen to notify your mailbox holders if they have mail. You can either send a Text (SMS) or an email. Type in the mailbox number and hit Enter.

If you have a wireless barcode scanner, and you have barcoded numbers on your mailboxes, you can open this window and then scan each box as you put mail in it. The scanner has a built in “enter” when the number is scanned, so you can send the notices as you scan them.

6 BULK EMAIL MAILBOX NOTICES

Click on Bulk Email Mailbox Notices and the following screen will come up:



You can Email renewals, Expiration Notices, and Cancellation notices. Note: Email has to be set up before these functions will work.

The system will give you a pop up message for any notice that did not go through so that you can go into their Account information and enter the correct email.

G. RENEWAL, EXPIRATION AND CANCELLATION NOTICES

The ShipRite MailBox Master has 3 different notices that are printed out automatically. In the setup section, you can say set when you will be notified and what the reminder will read. When you start ShipRite each day, the Memo Tickler will open.

Things To Do Today


Today is Wednesday, September 13, 2017


The List...


Due Date	Type	Contact	Applies To	Status	Priority
09/10/2017	MailBox Reports		Manager	Open	Urgent
06/13/2017	Action Item	Whitley, Theresa 702-463-4047 924 Chaps Cir Henderson, NV 89002	All Employees	Open	Routine


The Details...


0 - Renewal Notices
0 - Expiration Notices
1 - Cancellation Notices

Continue 

Print 

Delete 

Mailbox Notices 

Email Mailbox Notices 

If you have notice that there are mailbox reports due to print, double click on the report tickler OR you can click once on the item and then click the PRINT icon on the RIGHT.

You can also Email notices

Only those items that are due will print. If there are no reports to print, the Mailbox Reports memo will NOT be there.

When you click Print from the above tickler screen, you will get your notices that need to print....

ShipRite Demo Las Vegas

924 Chaps Circle
Henderson, NV 89002
315-555-1212

MAILBOX

Cancellation Notice

MAILBOX NUMBER	DATEDUE
170	07/31/2017

(CHOOSE ONE)

Personal Box Rates in Effect

() 1 month	\$12.00
() 3 months	\$36.00
() 6 months	\$72.00
() 12 months	\$144.00
() Other \$ _____ * ___ Month = _____	

In 5 days from the date of this notice, your mailbox will be expired and your mail with held.

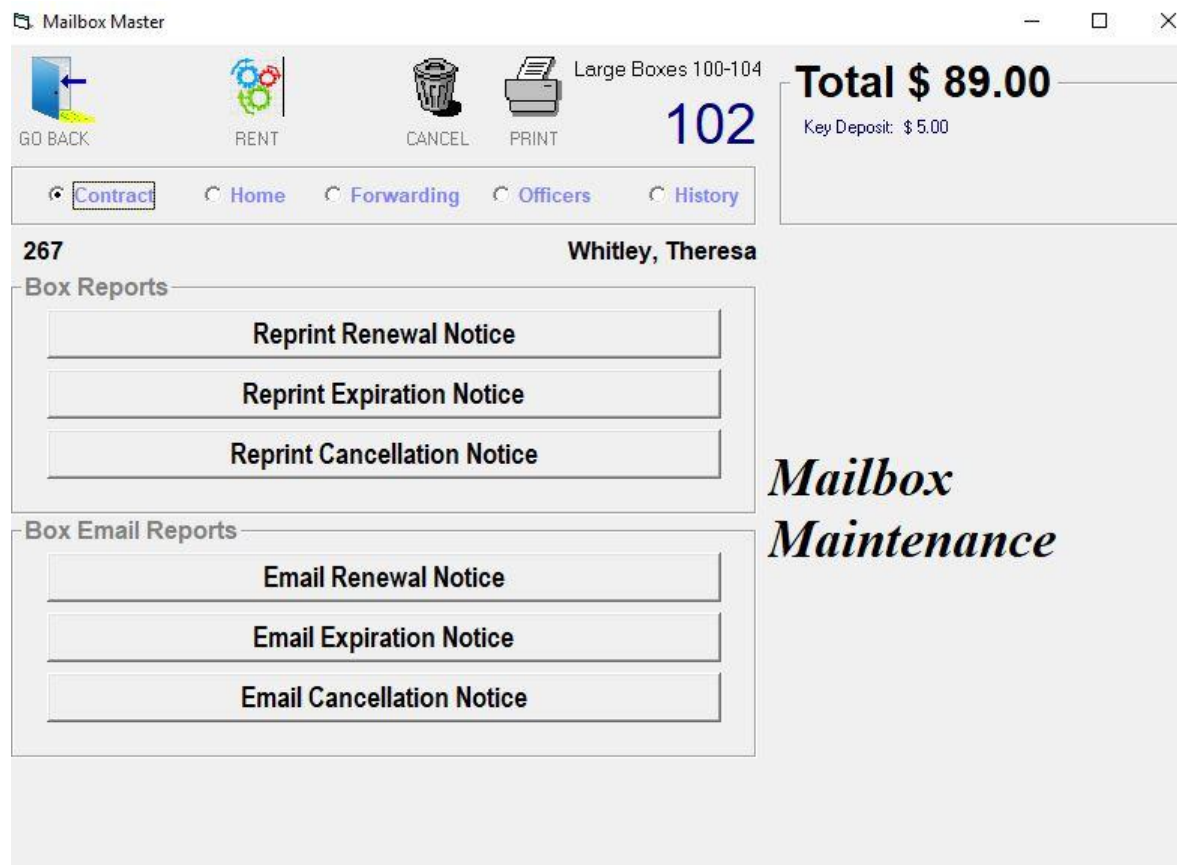
← The 3 different notices will be printed if they are due. They will all be in the format shown to the left.

The intention of these notices is to put them in the customers' boxes. They will print out according to the timing schedule you defined in the Mailbox Setup.

H. REPRINTING RENEWAL, EXPIRATION AND CANCELLATION NOTICES:

If you are using the POS as well as the Mailbox rental module, follow these steps to reprint the notices:

From the POS screen, load your mailbox holder through Customer Lookup. Click on the Mailbox Rental button, choose Mailbox Maintenance. The General information screen will open. Click on the Print button at the top of the screen and the following screen will be displayed. You can reprint or email any mailbox notice.



If you are not using the POS, from the Main Shiprite menu, select Actions, Mailbox Manager, select your mailbox holder, click on the Print button and choose the notice you would like to print.

I. REPRINTING MAILBOX AGREEMENT/PS1583:

If for any reason you need to reprint the Mailbox Agreement or the PS1583 form, this is done very easily. From the Main Shiprite menu, go to Actions – Mailbox Manager. Select the Mailbox holder; this will bring up the customer information to the left. Click on the RENT button at the top of the window. This will bring up the Printing form for you to select the type of rental and two forms of ID. All of the mailbox holders' information will be pre-filled. Choose Continue and “yes” to preview the reports.

The screenshot displays the Mailbox Master software interface. At the top, there are navigation buttons: GO BACK, CLEAR, RENT, CANCEL, and PRINT. The main area shows 'Medium Boxes' with a count of 106 and a 'Total \$ 71.00' with a 'Key Deposit: \$ 5.00'. Below this, there are tabs for Contract, Home, Forwarding, Officers, and History. The left sidebar shows customer information for '269 Mailbox Customer' with details for 'Starr, Theresa' and contract information. A 'Printing' dialog box is open in the center, allowing selection of 'USPS 1583 Form' and 'Rental Agreement'. It includes a 'Required Information for Printing 1583' section with a 'Type of Business' dropdown set to 'PERSONAL' and two 'Forms of ID' fields containing 'NV D/L #1222222' and 'REGISTRATION'. Action buttons for 'CONTINUE', 'NO PRINT', and 'CANCEL' are visible on the right side of the dialog.

On the preview screen, click the printer icon and specify the number of copies you would like to print.

