



SHIPPING SOLUTIONS[®]

export documentation software

GETTING STARTED GUIDE



Table of Contents

[About Shipping Solutions®](#)

[Software Overview](#)

[Getting Started with Shipping Solutions](#)

[Main Menu](#)

[Populating the Databases](#)

[Creating a Shipment](#)

Shipping Solutions Professional



About Shipping Solutions®

Congratulations on your decision to use Shipping Solutions, America's #1 selling export documentation and compliance software. Shipping Solutions is used by thousands of exporters who save time and money every time they prepare a new export shipment.

We are proud to offer three versions of Shipping Solutions: Classic, Professional and Enterprise. Shipping Solutions Classic is a great tool for small companies to begin preparing their export documents faster, easier and cheaper than they ever thought possible.

In addition to providing all the same features as the Classic version, Shipping Solutions Professional gives you more—more forms, more ways to share data and forms, and more ways to ensure that your exports comply with export regulations.

Shipping Solutions Enterprise includes all the features and functionality of the Professional version along with the ability to install the client software on an unlimited number of user's computers.

This User Guide explains the installation and use of the Shipping Solutions Classic, Shipping Solutions Professional, and Shipping Solutions Enterprise software.

The features described in this User Guide that are only found in the Shipping Solutions Professional and Shipping Solutions Enterprise versions are clearly marked as Shipping Solutions Professional version only. All screenshots are taken from Shipping Solutions Professional.

Software Overview

Whether you are an experienced exporter, an experienced computer user, or inexperienced at both, Shipping Solutions is the easy way to enter your export orders and complete your standard export documents.

By utilizing the program's extensive databases and the EZ Start screens, you can reduce the time it takes to enter your export information by up to or more than 80 percent. And because the software allows you to print standard export forms on plain paper from your inkjet or laser printer, it eliminates the need to purchase and stock expensive pre-printed forms.

With Shipping Solutions, you simply enter your export information on the EZ Start screens, select the documents you need to print, and in a matter of just a few minutes your paperwork is done and your products are ready to ship.

To make the program even easier to use, Shipping Solutions allows you to key in or import your product information, customer information, and all the intermediate consignees, forwarding agents and other miscellaneous contacts you ever use into separate databases. For even more efficient use, you can import orders into Shipping Solutions Professional from almost any accounting, order entry, or ERP system.

Current subscribers to the Shipping Solutions Professional Annual Maintenance Program (AMP) can also check to see what documents they need to produce for exporting to specific countries, check the parties in their transaction against the various government and United Nations restricted party lists, and check their products against U.S. Export Regulations to determine if they need to apply for an export license.

Please Note: After completing your export documents, you must carefully review the printed form(s) before use. Because Shipping Solutions does not restrict or limit the way you enter information into each field, InterMart, Inc. cannot and does not in any way guarantee the accuracy of the completed forms. InterMart strongly recommends that everyone involved in export documentation get thorough and complete training from government or private training companies.

Getting Started with Shipping Solutions

The **Getting Started** section of the Shipping Solutions User Guide is intended to provide you with a brief overview of the most-used features found in the software. By reviewing this section of the User Guide, you will learn the basics of using Shipping Solutions to reduce the time it takes to create and print out your export documents. As you get familiar with the software, you should review the remaining sections of the User Guide to learn more about the additional features and functionality of the program that has made it the #1 selling export software.

Shipping Solutions Professional Main Menu



Main Menu

When you start the Shipping Solutions software you will see the **Main Menu**, which is the starting point for the software. From this screen, you will find the version number for your software in the box below the Shipping Solutions logo; links to the Help Desk, Training Videos, and Annual Maintenance Program (AMP) login screen; and a **News Flashes** box that includes helpful links and news of interest to Shipping Solutions users.

If you have the multi-user version of Shipping Solutions, there will be a **Login** button in the lower right corner of the screen. Use the username and password provided by your administrator to login. To exit the program, click the red X in the upper right corner of the software.

The **Main Menu** also includes a series of tabs that will take you to various parts of the Shipping Solutions software:

EZ Start

The **EZ Start** tab is the most frequently used part of Shipping Solutions. This is where you will enter the information you need to build a shipment; where you can preview, print and email your export documents; where you can file your export information through the Automated Export System (AES); and where Shipping Solutions

Professional users can run the Export Compliance Module to ensure that your shipment complies with current U.S. export regulations.

Databases

The **Databases** tab allows you to store information about your company, your customers and your products, so you don't have to manually enter all that information every time you create a new shipment.

Utilities

The **Utilities** tab includes a Conversion Calculator so you can quickly and easily convert measurements between Imperial and metric. In addition, the tab allows you to generate reports from your shipment history, print basic shipping labels, and, in the Shipping Solutions Professional version, generate raw data files.

Tools

The **Tools** tab includes utilities for importing data from an existing spreadsheet or database into the various Shipping Solutions databases found on the **Databases** tab; export the data from the Shipping Solutions databases into a text-delimited format; backup your existing shipment and database information; delete selected shipments; and customize certain aspects of the export documents. In addition, the **Tools** tab allows Shipping Solutions Professional users to run the Data Exchange Manager to import shipment data from your company's accounting, order-entry or ERP system, and lock or unlock shipment records.

Admin

The **Admin** tab provides a variety of functions depending on whether you are using the Shipping Solutions Classic or Shipping Solutions Professional version and depending on whether you have the single-user version or the multi-user version of the software. This tab includes setting up the database connection with your SQL server; setting up the Data Exchange Manager for importing orders from your accounting, order-entry or ERP system; storing signatures and logos that will print on your export forms; setting up a profile for each user; setting up User Groups and User Accounts that will allow you to control which users have access to certain features; and registering your software with InterMart.

Populating the Databases

To get the maximum benefit from Shipping Solutions, the first time you use the program you should spend some time entering information into its various databases. By doing so, you will eliminate the need to retype common data every time you prepare a new shipment as well as reduce the likelihood of errors that can delay shipments or require expensive changes.

To access any of the Shipping Solutions databases, click on the **Databases** tab at the top of the screen.

You can manually enter your contacts and products or import your contacts and products from a text file. More detail on importing your contacts and products from a text file can be found in the full Shipping Solutions User Guide.

Contacts Database Screen

Contacts Database

0 of 0 | Add New Contact | Delete Contact | Save | Close

Select Contacts Type: Exporters

Company: Contact First Name:

Address 1: Contact Last Name:

Address 2: Contact Title:

City: Phone Number:

State: Postal Code: Fax Number:

Country: Email Address:

Tax ID Number: Tax ID Type: Contact Note:

Account Number:

Search Contacts

Match: Starts With Search For Company: Clear Filter

Company	Address 1	Address 2	City	State	Postal Code	Country	Contact First Name
---------	-----------	-----------	------	-------	-------------	---------	--------------------

Follow the steps below to manually add items to the **Contacts Database**:

1. Click the **Databases** tab and then click **Contacts**.
2. From the **Select Contacts Type** drop-down list, choose the type of contact you want to enter; for example, **Exporters**.
3. Click the **Add New Contact** button and fill in the boxes with your contact's information.
4. After you have entered that contact's information, click **Save**. The contact will appear in the grid at the bottom of the screen. If you have more contacts to enter, click **Add New Contact** and add the next contact. You can change the contact type to enter a different type of contact.

Please Note: You can search for a contact in the **Search Contacts** box. Choose **Starts With** or **Contains** in the **Match** drop-down list. Start typing the company name in the **Search for Company** box. The grid will display any companies matching your search criteria.

5. To delete a contact, click on that contact in the grid and click **Delete**.
6. Closing the **Contacts** screen will return you to the **Databases** menu.

Products Database Screen

Product ID	Product Description	Schedule B/HTS Code	Unit Price	ECCN	License Type
SSCLA-S	Shipping Solutions Classic export documentation software	8523.49.2010	1199.00	EAR99	C33
SSCLA-N	Shipping Solutions Classic export documentation software - Additional Netw...	8523.49.2010	600.00	EAR99	C33
SSPRO-S	Shipping Solutions Professional export documentation and compliance softw...	8523.49.2010	2999.00	EAR99	C33
SSPRO-N	Shipping Solutions Professional export documentation and compliance softw...	8523.49.2010	1500.00	EAR99	C33
SSCLA-ANL	Shipping Solutions Classic - Annual Maintenance Program subscription rene...	8523.49.2010	300.00	EAR99	C33

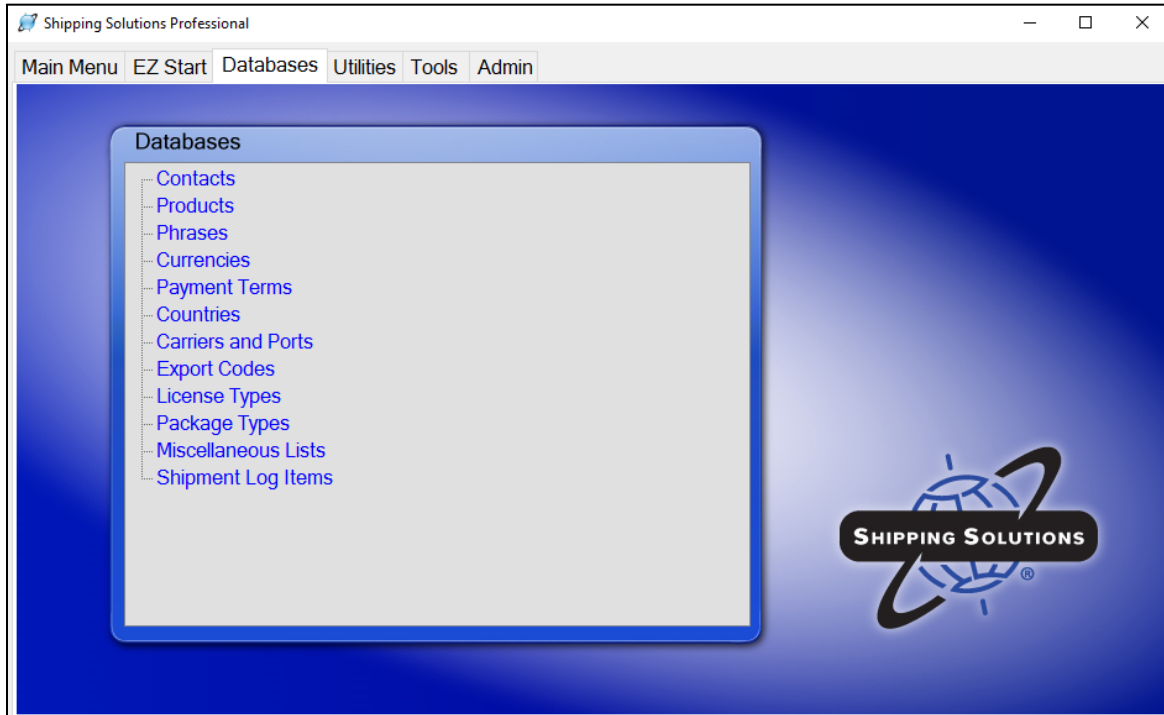
Follow the steps below to manually add items to the **Products Database**:

1. Make sure you are on the **Databases** tab and then click **Products**.
2. Click the **Add New Product** button and fill in the boxes with your product information. Note that there is a second tab for the AES DDTC information, which is only required if a product ships under a DDTC State Department license. There is also a third tab for dangerous goods information.
3. After you have entered the information for that product, click **Save**. The product will appear in the grid at the bottom of the screen. If you have more products to enter, click **Add New Product** and add the next product. You can also click on **Copy Product** to copy all the information of an existing product to a new product record. The new product will show the same **Product ID** with “- Copy” appended to it. You can then assign a new product ID if you wish and edit any of the other product information.

Please Note: You can search for a product in the **Search Products** box. Choose whether you want to search on **Product ID** or **Description**. Then choose **Starts With** or **Contains** in the **Match** drop-down list. Start typing the product ID or description in the **Search for** box. The grid will display any products matching your search criteria.

4. To delete a product, click on that product in the grid and click **Delete**.
5. You must always click **Save** before closing the screen to save your changes.
6. Closing the **Products** screen will return you to the **Databases** menu.

List of Databases Available on the Database Tab



You can now proceed down the list of databases on the **Databases** tab entering any information you have:

- Click **Phrases** to enter any phrases you use often on your documents. Several common phrases are pre-loaded. Click the **Phrase Title** in the grid to see the **Phrase Text** and modify it to meet your company's needs. Click **Add** to enter a new phrase. Enter a title for the phrase in the **Phrase Title** box and enter the actual phrase in the **Phrase Text** box. Click **Save**.
- Click **Currencies** to enter currency exchange rates. These will be used if you choose an **Invoice Currency** or an **Alternate Currency** other than U.S. dollars on the **Invoices-Proforma/Commercial** screen available on the **EZ Start** tab. You can always, however, overwrite these exchange rates on the **EZ Start** screen.
- Click **Payment Terms** to enter any additional payment terms used by your company. To add another term, click **Add**, enter your new payment term, then click **Save** and **Close**.
- The **Countries**, **Export Codes** and **License Types** are preloaded databases, but you can add or modify them if needed. To add an entry, click on the database, click **Add**, enter the new entry, then click **Save** and **Close**.
- The **Carriers and Ports** database also comes preloaded with the four lists of carrier and port names and codes provided by the U.S. Census Bureau for use with the Automated Export System (AES). This list of codes does occasionally change, and you update one or more of the lists by clicking on the database name and then clicking on the **Update AES Codes** button. On the **Download AES Code Files** window that opens, choose which lists you want to update and then click **Run Selected Updates**. Like the other preloaded databases in Shipping Solutions, you can also manually add or modify a specific list by clicking on the list name, clicking on **Add**, typing in the new entry, and then clicking on **Save** and **Close**.
- The **Package Types** database allows you to store commonly used box sizes for use on the Packing List.
- The **Miscellaneous Lists** database allows you to add additional items to certain drop-down menus on various screens in Shipping Solutions such as the types of packing items on the Inland Bill of Lading form.

- The **Shipment Log Items** screen allows you to add the individual tasks that are part of your export process, often referred to as an Export Management System (EMS) plan, so you can document that they are being followed on every shipment. To ensure compliance with export regulations, the Bureau of Industry and Security (BIS) strongly recommends that companies create a written EMS that clearly outlines what steps your company needs to follow prior to every export shipment to ensure that you haven't violated current export regulations. To add or change a task click **Add** and type the task on the highlighted line. Click **Save** and **Close**.

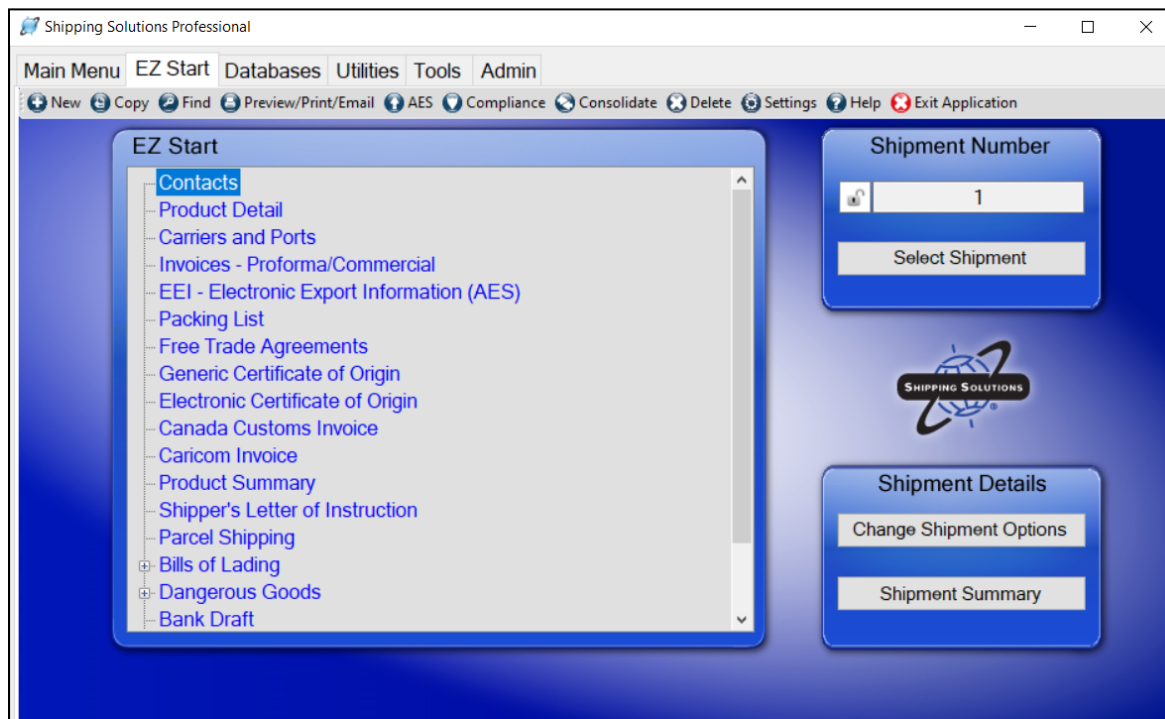
Creating a Shipment

Whether you are an experienced exporter or just getting started with exporting, Shipping Solutions makes filling out your export documents fast and easy. Just enter your shipment information into the software, and Shipping Solutions automatically completes the shipping documents, which you can then print out on plain paper.

Shipping Solutions provides two ways to enter your shipment information into the software: (1) manually enter the information into the program's various **EZ Start** screens, or (2) use the program's **Data Exchange Manager** to import the information from your company's accounting, order-entry or ERP system.

This **Getting Started** section of the User Guide will focus on option number one: entering your data into the **EZ Start** screens. You'll find more information about setting up and using the **Data Exchange Manager** in the full Shipping Solutions User Guide.

The EZ Start Tab in Shipping Solutions



To make the program easy to use, **EZ Start** is divided into several different screens each focusing on either certain types of information (e.g. contacts and product detail) or on specific documents (e.g. commercial invoice, NAFTA and packing list). By working your way down the list—skipping those screens or fields you don't need for a particular shipment—you have completed a set of export documents.

As a general rule, Shipping Solutions recommends that new users pay close attention to the first five screens: **Contacts, Product Detail, Carriers and Ports, Invoices-Proforma/Commercial and EEI-Electronic Export Information (AES)**. These screens include information that is required on most of the forms. However, none of the fields are required by Shipping Solutions.

As you enter the appropriate information on each of the **EZ Start** screens, Shipping Solutions automatically enters the information in the proper fields on the appropriate documents. So, for example, while your exporter information appears on most of the export forms, you only need to enter the information once.

Please note: Shipping Solutions does not guarantee the accuracy of your export documents. You must review each form carefully to ensure that it has been completed fully and accurately.

Follow these steps to create a basic shipment in **EZ Start**:

1. Click the **EZ Start** tab.
2. Click the **New** button to add a new shipment. A message should pop saying, “New Shipment has been Created.”

The Contacts Screen in EZ Start

3. Click **Contacts**.

- A. The first screen you see is the **Exporter** window. Type the exporter information in the boxes on the screen or add a contact from the database by clicking **Add Contact From Database**, which is the most efficient way to do it. The **Contacts Database** will open, and you can select an exporter from the grid or search for a contact by choosing between **Starts With** or **Contains** in the **Match** drop-down box and then typing in the **Search For Company** box. Exporters that match your search criteria will appear in the grid. Click on the exporter in the grid and click **Add Contact**. You will be taken back to the **EZ Start Contacts** screen where your exporter information has been filled in.
- B. Click **Ultimate Consignee** in the box on the left side of the screen. Add your **Ultimate Consignee** the same way you entered your **Exporter**. Continue down the list for any contact that you want to fill in.
- C. Click the **Save** button and then the **Close** button.

The Product Detail Screen in EZ Start

4. Click **Product Detail**.

- A. To type your product information directly on this screen, click **Add New Product** and then start typing. To choose a product from your product database, which is the most efficient way to do it, click **Add Products from Database**.
- B. If you click **Add Products from Database**, the **Products Database** will open where you can select a product from the grid or search for a product. To search choose **ProductID** or **Description** in the **Column** drop-down box and either **Start With** or **Contains** in the **Match** drop-down box. Then type what you are looking for in the **Search For** box. **Products** that match your search criteria will appear in the grid.
- C. Click on the product or products in the grid and click **Add Selected Products to Shipment**. You will be taken back to the **EZ Start Product Detail** screen where your products have been filled in. The counter in the upper left corner shows how many products are in your shipment. You can navigate between the products by using the arrow keys in the upper-left corner of the **Product Detail** window. Click the **Add Products from Database** as many times as needed to add all the products in your shipment.

Please Note: To select more than one product at a time from the Product Database, hold down the **Ctrl** button on your keyboard as you click on each item in the product grid.

- D. Once you have all the products added, fill in quantities and any other missing information. Note that there are separate tabs for vehicle information, DDTC information, and dangerous goods information. Fill in only what is necessary for your paperwork. For example, if you don't need a Certificate of Origin, you do not need to fill in the Certificate of Origin section of the screen.
- E. Click the **Save** button and then the **Close** button.

The Carriers and Ports Screen in EZ Start

5. Click **Carriers and Ports**.

- A. Enter the fields on this screen depending on which documents you need. If you plan to file through AES, you will need to fill in all the fields. If you are not filing through AES, enter the data you know.
- B. Click **Save and Close**.

6. Now you can work your way down the list entering information only on the screens for the forms you are going to use. For example, if you need a Commercial Invoice, go to the **Invoices—Proforma/Commercial** screen next and fill in the information, but if you do not need a packing list you can skip that screen.

The Preview/Print/Email Menu in EZ Start

7. Once you have entered your shipment information into the various **EZ Start** screens, you view or print your documents by clicking on the **Preview/Print/Email** button located on the toolbar.

- A. To preview a document, click on the name of the document and then click **Preview**. You can only preview one document at a time.
- B. To print documents, click on the name of the document and click **Print**. To choose more than one document, hold down the **Ctrl** key as you choose the documents. You can also specify multiple copies of the documents.
- C. To create a PDF version of your documents, click the document and click **Print to PDF**. Use the **Ctrl** key to choose multiple documents. If you want the documents combined into a single PDF file, click the **Combine** check box. Otherwise the documents will be saved individually in the PDF format. You will be prompted to designate where you want the PDF versions saved and you can change the name of the file or files.
- D. To email documents select an email address from the dropdown list or type an email in the **Send email to** box. You can enter multiple email addresses, but they must be separated by a semi-colon. You can also choose multiple documents to email by holding down the **Ctrl** key when choosing the documents. They will be attached to your email as separate documents. Click **Email PDF** and an email will open where you can edit the subject line and body of the email and then send it as you would any email.

8. At this point you can also file your shipment with the U.S. Census Bureau through the Automated Export System (AES), check to see if your shipment complies with U.S. export regulations (with the Shipping Solutions Professional version only), or do several other things with your export shipment explained more fully in the **EZ Start** section of the User Guide below.

The following sections provide more detail on all the Shipping Solutions screens.

Version 06.24.22

© 2022, InterMart, Inc., 1400 Corporate Center Curve, Suite 130, Eagan, MN 55121.
InterMart and Shipping Solutions are registered trademarks of InterMart, Inc. All Rights Reserved.