

ShipWorks[®]

User Guide

Shipping Rules

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Preface

About This Guide

Whether you're a shipper looking to expand your shipping and fulfillment capabilities, or a third party platform delivering innovative solutions for e-commerce customers and beyond, ShipWorks can help. With our APIs, you can rapidly integrate with ShipWorks and begin leveraging the power and sophistication of its core functionality. This guide contains the requirements and instructions for developing an integration point for your data source and ShipWorks.

About ShipWorks

For over 10 years, ShipWorks has helped thousands of companies scale their e-commerce businesses. ShipWorks is a Windows-based software used by e-commerce and shipping professionals to download and process orders. With ShipWorks you can print shipping labels, generate packing lists and invoices, manage customer information, upload tracking information, and more. A user can connect to any number of stores or data sources and leverage all of our certified shipping carriers.

ShipWorks System Requirements

Small businesses that have 1-2 online marketplaces, 1-2 shipping providers, approximately 50K orders in a database (if importing previous orders) will need:

- **CPU Type:** Intel Core Duo, AMD Phenom
- **CPU Speed:** 2.5 GHz
- **RAM:** 2GB
- **HDD Space:** 10GB
- **Internet Connection:** High speed, 2MB
- **Network Connectivity:** N/A
- **OS:** Windows Vista

Medium and larger scale businesses can refer to the full list of system requirements [here](#).

Introduction to Shipping Rules

With Shipping Rules, you can configure ShipWorks to automate shipments based on your business logic. ShipWorks can be set to filter for specific orders and then automatically apply carrier-specific service options using shipping profiles for those filtered orders. Shipping rules save you time by automating the entry of shipment details when shipping orders.

Anatomy of a Shipping Rule

When you create a shipping rule, you basically tell ShipWorks: “When an order is of <this> type, then apply <these> default shipping settings.”

Shipping rules are made of two basic parts:

1. The **FILTER** finds the orders that meet your user-defined conditions. You don’t have to have the filters preconfigured – you can set them up on the fly as you create your shipping rules!
2. The **PROFILE** defines the specific default shipping details that will be loaded onto the **Ship Orders** screen for the orders in the specified filter.

The settings of every profile where the order is in the selected filter will be applied to the shipment.



Planning Considerations

- Shipping Rules are specific to each Shipping provider.
- Shipping Profiles define the default shipping settings for particular types of orders. These settings may include: From Account (if you have multiple accounts with this provider); Origin address; Address Validation; Shipping Service; Confirmation Requirements; Billing information; Packaging information; Stealth mode; Memos; Label Format; Insurance options; Customs Content; Signature Waivers, and even Return Shipments. The specific options available are different for each shipping provider. It is helpful to take a look at the options available for each of your shipping providers. Go to **Manage > Shipping Settings**, select each shipping provider, and click the “[Defaults-providename](#)” link on the Settings tab.
- You can create multiple Shipping Rules for each shipping provider. If a Shipping provider has more than one Shipping Rule, ShipWorks applies ALL of the rules in order. First, the defaults are applied

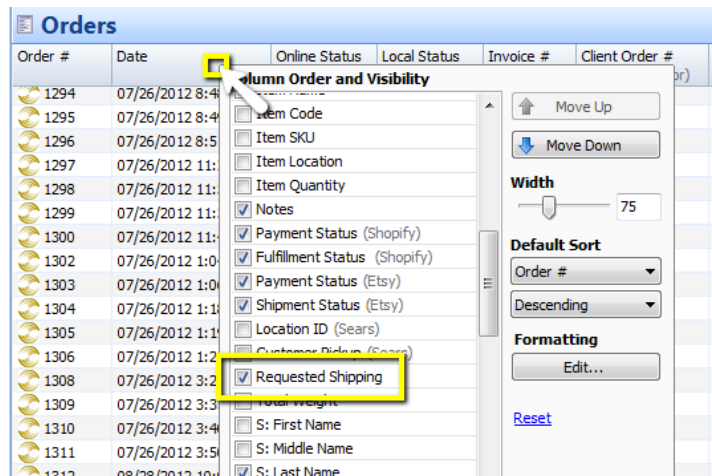
and then ShipWorks continues through the list of Shipping Rules and applies each rule. Each time a rule is read and applied, it overwrites already applied rules.

- Shipping Rules can include multiple filters with complex details. You can filter orders for item information, weight, quantities of items on the orders, shipping addresses, and much more. You can also include ALL and ANY logic when configuring filters to make them as flexible as possible. You can find more information and help on filters at www.shipworks.com/support

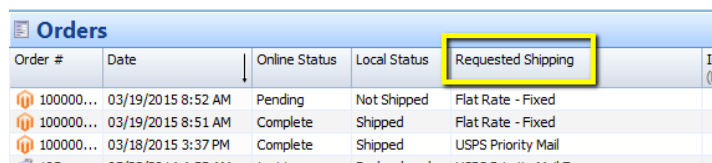
Editing the Orders Grid

You might want to see the filter criteria displayed on the **Orders** grid when you open ShipWorks. Did you know this grid display is customizable? Right-click any column header and you can see all of the columns that are available for display in the grid.

- On the main **Orders** grid, right click on any column header and you'll see a popup box with display options. Just check the boxes for the columns you want to be visible. The columns available here are determined by what stores you have activated in ShipWorks.



- Click anywhere outside the **Column Order and Visibility** pop-up and it will close.
- In our example, we checked the “Requested Shipping” column so we can see what the customer requested. Note that you can left-click and hold a column header to drag it to another position.



Creating a Shipping Rule

There are three main steps to creating a shipping rule:

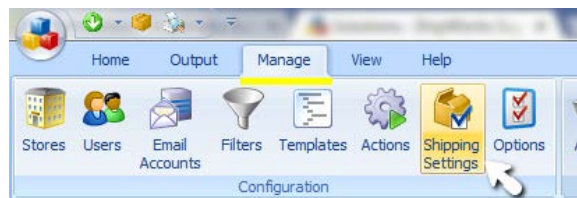
- 1) Navigate to Shipping Settings and select the provider to begin the “Add Rule” dialog.
- 2) Create a filter to capture the desired types of orders
- 3) Create and select a shipping profile to apply to those orders.

You can follow along below as we complete each step to create an example shipping rule. You should be able to apply this method to configure many variations of filters and profiles to fit your unique business needs. If you need any assistance with creating some more complex rules, please feel free to [contact our support staff](#). We are always happy to help!

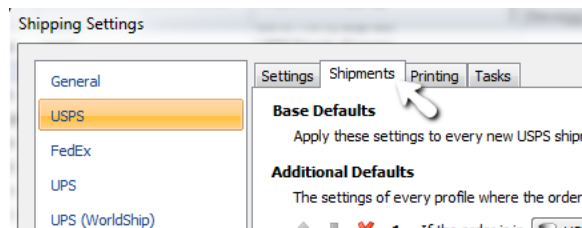
In this example, we will create a common shipping rule for USPS, to automatically apply a shipping service based upon the requested shipping method and to automatically hide postage for these shipments, too.

Step 1: Add a Rule for the Provider, in Shipping Settings

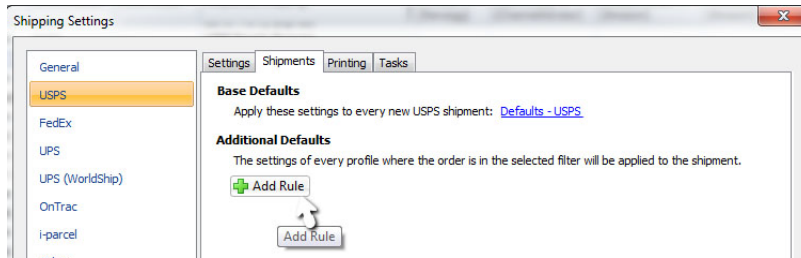
1. In ShipWorks, click the **Manage** tab and then click **Shipping Settings**.



2. Select the shipping provider related to this shipping rule, and select the **Shipments** tab.



3. Click **+Add Rule** under the Additional Defaults section of the tab.



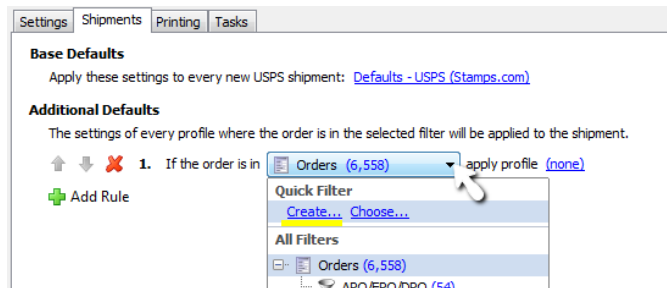
Note the format of the rules: “If the order is in [name the filter] apply profile [name profile].”

Default Rule: The settings of every profile where the order is in the selected filter will be applied to the shipment.
 ↑ ↓ ✖ 1. If the order is in Orders (6,558) apply profile [\(none\)](#)

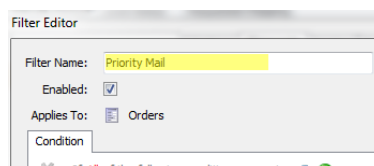
Example Rule: The settings of every profile where the order is in the selected filter will be applied to the shipment.
 ↑ ↓ ✖ 1. If the order is in USPS-Priority (23) apply profile [PriorityMail](#)


Step 2: Create a Filter

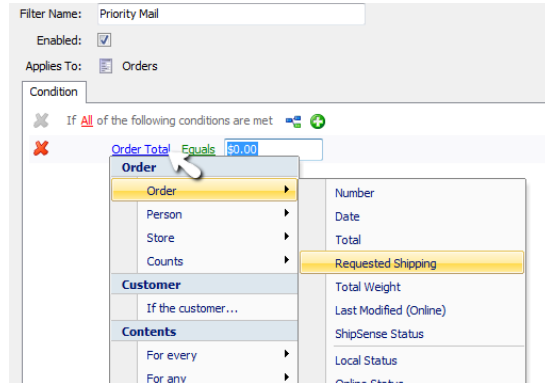
1. Click the drop-down menu for the filter name to select an existing filter or create a “Quick Filter” now. In our example, we will create a “Quick Filter” that captures all orders with a Requested Shipping method of USPS Priority Mail.



2. Click in the *Filter Name:* field and type a name. We’ll use Priority Mail.



- Next, click the **Add** Condition icon . By default, the condition is: *“Order Total Equals \$0.00.”* Let’s change that to: *“Requested Shipping Equals USPS Priority Mail.”*
- Click the blue text *Order Total* and, from the drop-down menu, select Order > Requested Shipping to change the criteria for the filter.

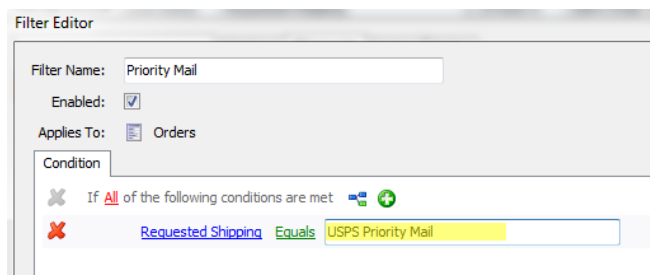


---Note that the filter condition options change depending on what you choose in the dropdown. If you had chosen ‘Order Date’ as your initial filter criteria instead of ‘Requested Shipping,’ you would have other options, such as ‘Is Between’ or ‘Is Within the last’ ... so you can be very specific about date ranges.

- Leave ‘Equals’ as is for our example.

---Note also that the ‘Equals’ can be changed to other options, such as ‘Contains’ or ‘Begins With.’ You might choose ‘Contains’ to search for orders with a Requested Shipping method containing “USPS.” This would include orders with USPS Priority, USPS Priority Express, and USPS First Class, and so on.

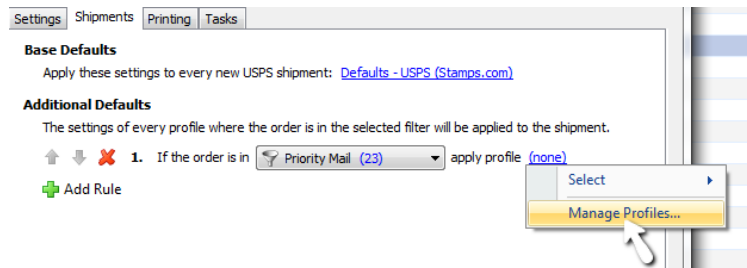
- Enter the condition for the filter. For our example, enter “USPS Priority Mail.”



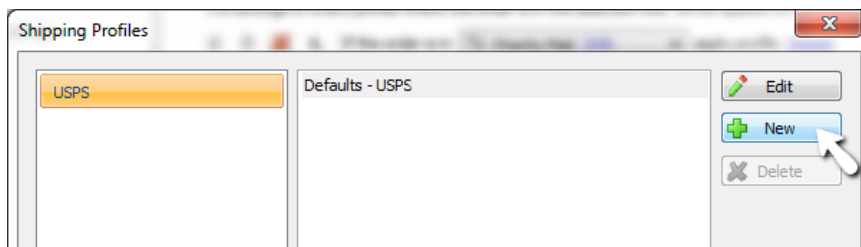
It isn’t necessary to add a condition in the filter to find orders that have not been shipped. We just need all orders that have a specific shipping method to be put into one place so that if a new shipment is created for any of these orders, the correct shipping profile is applied.

Step 3: Create (or Select) a Profile to Apply to the Rule

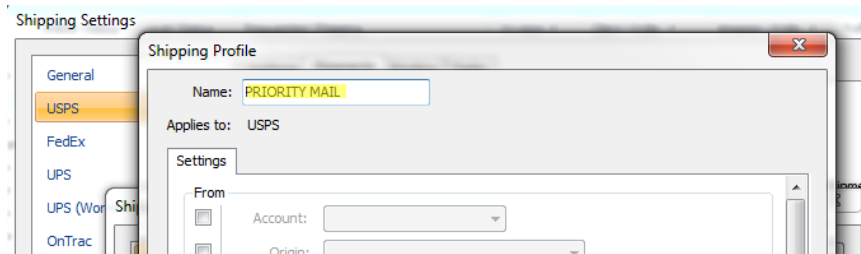
1. Click the word (none) in the default shipping rule and choose “Manage Profiles...”



2. Click the **+New** button.



3. Click in the **Name:** field and type in a name for the profile. For our example, name the profile **PRIORITY MAIL**.



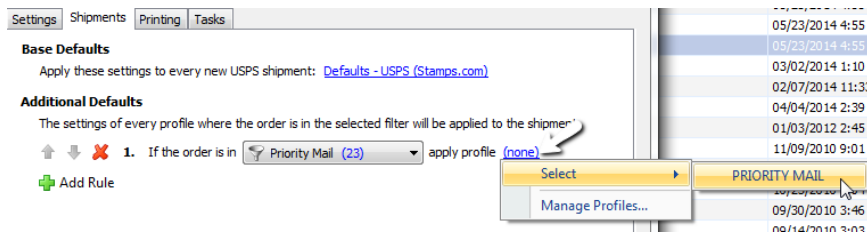
4. Next, select the default settings for the profile, just by checking or unchecking boxes and using the drop-down menus provided. These options will then be prepopulated in the *Ship Orders* screen for all orders that meet the filter criteria. For our example, let's select an origin address, the service, and hide postage. After you've selected the desired settings, click the **OK** button.

The screenshot shows a 'Shipping Profile' dialog box. At the top, the 'Name' is 'PRIORITY MAIL' and it 'Applies to: USPS'. The 'Settings' section is divided into three parts: 'From', 'To', and 'Shipment'. In the 'From' section, the 'Origin' is set to 'Store Address'. In the 'To' section, 'Validation' is set to 'Require full USPS address validation'. In the 'Shipment' section, 'Service' is 'Priority', 'Stealth' is checked, and 'Hide Postage' is checked. The 'OK' button at the bottom right is highlighted with a mouse cursor.

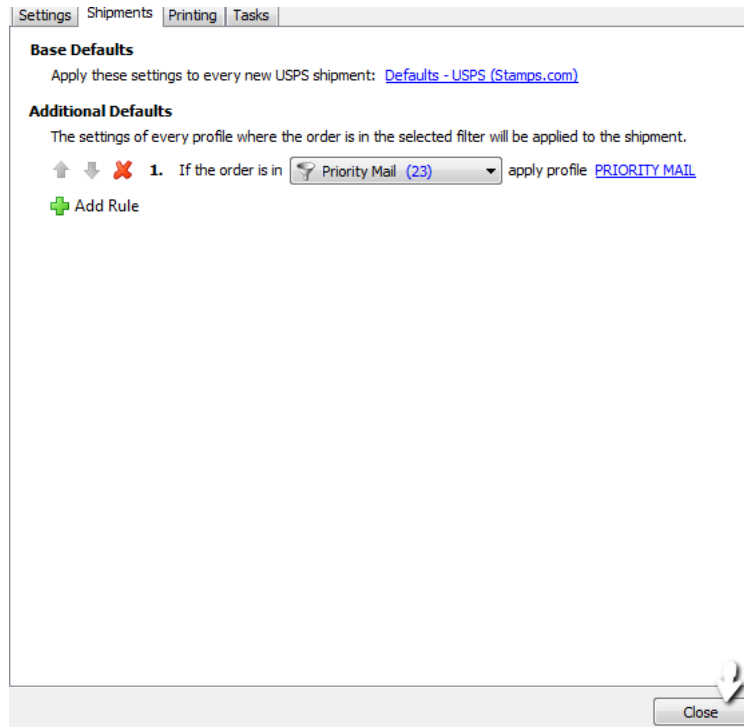
5. Click the **Close** button.

The screenshot shows a 'Shipping Profiles' dialog box. On the left, a list contains 'USPS'. On the right, the 'Defaults - USPS' section is expanded to show 'PRIORITY MAIL'. On the far right, there are buttons for 'Edit', 'New', and 'Delete'. At the bottom right, the 'Close' button is highlighted with a mouse cursor.

- Now select the word '(none)' from the default shipping rule to select the new profile you just created.



- Click the **Close** button.

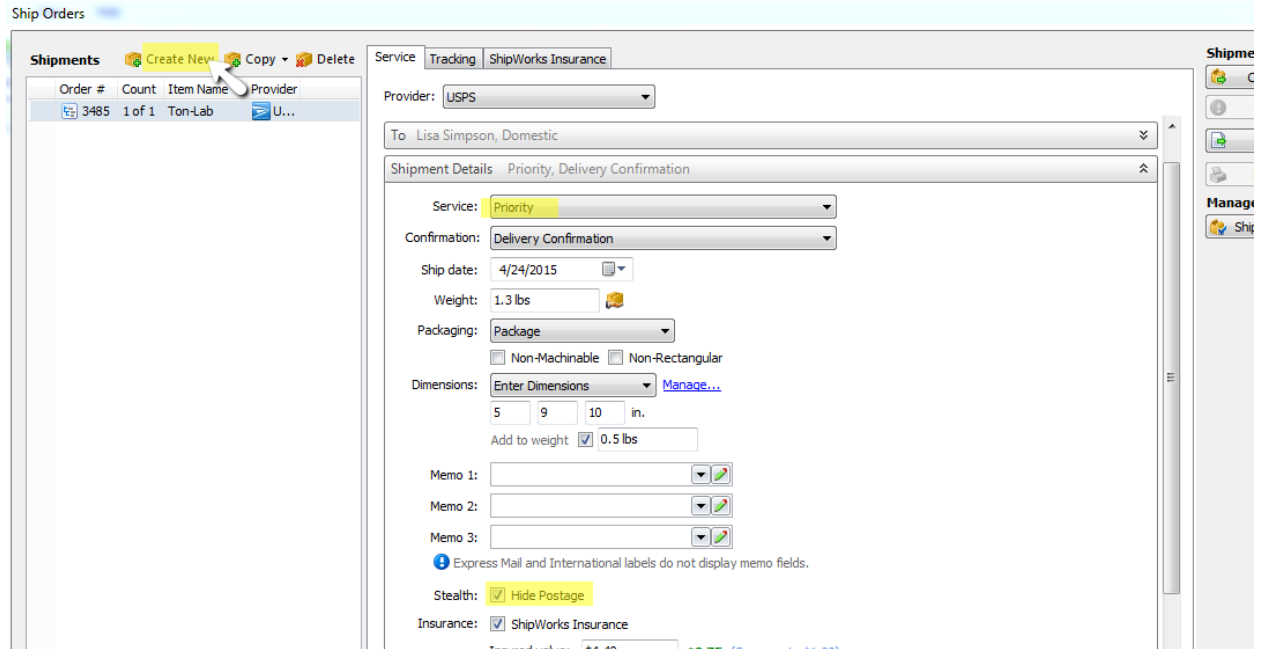


Shipping Rules in Action

Now any time an order has a Requested Shipping method equal to USPS Priority Mail, and a new shipment is generated for that order, ShipWorks will apply the PRIORITY MAIL profile.

Order #	Date	Local Status	Requested Shipping	Total Weight	Total
100000...	03/19/2015 8:52 AM	Not Shipped	USPS First Class	1.0 lbs	\$304.99
100000...	03/19/2015 8:51 AM	Shipped	UPS Ground	1.0 lbs	\$304.99
100000...	03/18/2015 3:37 PM	Shipped	USPS Priority Mail	1.0 lbs	\$304.99
105	05/23/2014 4:55 AM	Backordered	USPS Priority Express	24.0 lbs	\$40.86
99	05/23/2014 4:55 AM	In Process	USPS Priority Express	21.0 lbs	\$112.79
103	05/23/2014 4:55 AM	Not Shipped	USPS Priority Express	45.0 lbs	\$118.16
98	05/23/2014 4:55 AM	Not Shipped	USPS Priority Express	15.0 lbs	\$77.00
102	05/23/2014 4:55 AM	Shipped	USPS Priority Express	38.0 lbs	\$48.42
101	05/23/2014 4:55 AM	Shipped	USPS Priority Mail	58.0 lbs	\$151.16

If you'd like to see your new Shipping Rules in action, open an order, and then click "Create New" so you can see all of your new defaults.



ShipWorks Help

If you still need help, please let us know! This guide is meant to provide information about common usage of ShipWorks, but is by no means the only way we can offer assistance.

For more information about this or any other aspect of ShipWorks, please visit www.shipworks.com/support and read through our forum posts and help articles.

Please feel free to reach out to us directly via e-mail or phone. We'll be happy to help!

E-mail: support@shipworks.com

Phone: **800-952-7784**

Hours: **Monday - Friday, 8a.m. – 5p.m. (Central Time)**