SHIPPING SOLUTIONS®

export documentation software

USER GUIDE



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Incoterms® 2020

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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.

System Requirements

Recommended Minimum Hardware

- **Processor**: 1.4 GHz or faster x64 processor (recommend 2.0 GHz or faster)
- **RAM**: 4 GB
- **Disk Space**: 6 GB

Supported Operating Systems

- 64 bit version of Windows 10 or higher

Internet Security

Depending on your internet security settings and features you are using in the software, you may need to whitelist these URLs:

- https://wizards.amberroad.com – Export Compliance Module (Professional/Enterprise version only)
- https://ace.cbp.dhs.gov and https://ace.cbp.gov – ACE/AESDirect
- http://www.fedex.com – FedEx (Professional/Enterprise version only)
- http://www.apps.ups.com – UPS (Professional/Enterprise version only)
- https://ssam.shippingsolutionssoftware.com – Export Compliance Module (Professional/Enterprise version only), software registration, News Flashes screen
- https://api.chambercertification.com – Electronic Certificate of Origin

Cloud Hosting Requirements

For Enterprise customers and Cloud Hosted database customers, we use Microsoft's Azure Database hosting. Azure SQL Databases communicate over port 1433. If you're trying to connect from within a corporate network, outbound traffic over port 1433 might not be allowed by your network's firewall. If so, you won't be able to connect to your server unless your IT department opens port 1433.

Installation

Single-User Installation

The single-user version of Shipping Solutions includes a license to install the software on one computer. Microsoft SQL Express is installed along with the Shipping Solutions program. When doing the installation, it is best to be logged into the computer as the user who will be using the Shipping Solutions software. Otherwise, the user may have trouble accessing the SQL Server database.

We will provide you with a link to download the software. The Professional single user download is called **sspro_9Xs_setup.exe**, and the Classic single user version download is called **sspro_8Xs_setup.exe**, where X stands for the version number. Once the file is downloaded, double-click to install. Once the installation is complete, you will see a Shipping Solutions icon on your desktop.

Multi-User Installation

Shipping Solutions licenses are seat licenses. You need to purchase a license for each workstation that you are installing Shipping Solutions on.

The exception is the Enterprise version of Shipping Solutions that allows for unlimited installation of the client software with a database hosted on a Microsoft Azure cloud server managed by Shipping Solutions. Enterprise customers will receive a personalized link to download the Shipping Solutions software.

Most companies, however, purchase the number of Shipping Solutions licenses that they need. Additional licenses can be purchased at any time by calling us at **888-890-7447** or emailing **help@shippingsolutionssoftware.com**.

The multi-user version of Shipping Solutions requires Microsoft SQL or SQL Express to run the database file, which will store all your company's export shipment data created in the software. The database must be run somewhere where all users can access it. There are three options:

- Shipping Solutions can host the SQL database for you on a Microsoft Azure SQL Server in a cloud environment. There is an additional fee for this hosting service except for Enterprise customers. Contact us at **888-890-7447** to set up the cloud hosting of your database.

- If your company has an existing Microsoft SQL Server running version 2008 R2 or higher, you can run the Shipping Solutions database on that server.

- You can install Microsoft SQL Server Express 2012 on a shared computer that all users can access.

Running the Database on Your Company's Existing SQL Server

A link will be provided so you can download the database (ssdata_sql_01.mdf) and log (ssdata_sql_01_log.ldf) files.

Copy the **ssdata_sql_01.mdf** and **ssdata_sql_01_log.ldf** files to the desired location on your server. Using SQL Server Management Studio, attach the database to your SQL Server (2012 or higher) and configure logins and users for the newly attached database.

MS SQL Server offers two ways of implementing security. The first method uses Windows Integrated Security, which allows users in an already existing domain-controlled network to use the SQL Server without a separate login. The users' accounts or user groups can be simply assigned rights to the databases.

The second method uses SQL Server's built in security that will require a separate login from the network or other workstation login.

Creating SQL Server Logins

While we at Shipping Solutions do not provide support for implementing security on your company's existing SQL Server, the following instructions for creating SQL Server logins are provided as a courtesy for our users:

1. Open SQL Server Management Studio. Expand the **Security** tree.
2. Right click on **Logins** and choose **New Login**.
3. In the **Login name** box enter the username you want to create.
4. Click the **SQL Server** authentication button. Enter the password, and confirm the password.
5. Decide if you want to enforce the password policy by unchecking the boxes or leaving them checked.
6. In the **Default database** dropdown choose ssdata_sql_01. Click **OK**.
7. Expand the **Databases** tree. Expand the **ssdata_sql_01** tree. Expand the **Security** tree.

8. Right click on **Users** and choose **New User**.
9. Enter a user name. You may want to use the same username you created in step 3.
10. Next to the **Login Name** box click the browse button and choose the user name created in step 3.
11. In both the **Owned Schemas** and **Role Members** boxes, click the check box next to **db_accessadmin**, **db_datareader**, **db_datawriter**, and **db_owner**. Click **OK**.

Running the Database Using SQL Express on a Shared Network Computer

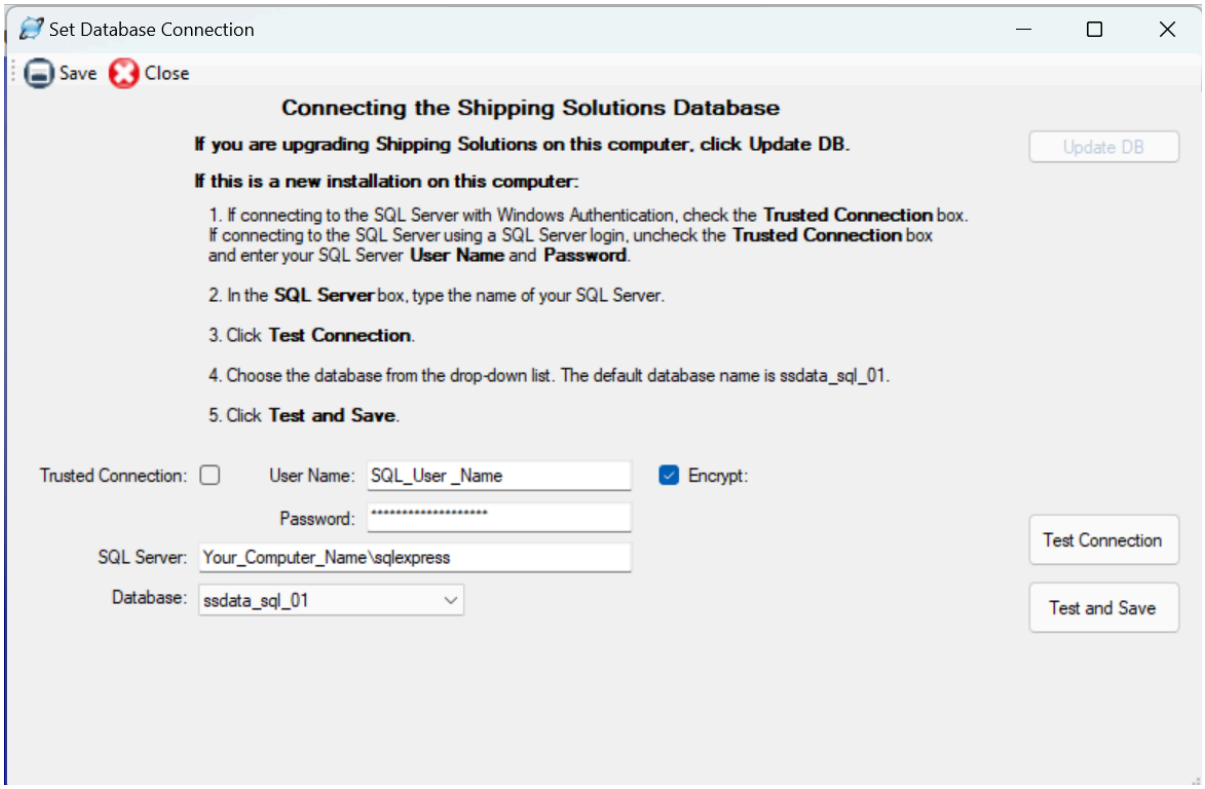
Click the Server link provided, which downloads a file called **SS_Server_Install.exe**. Double click on the downloaded file to install.

SQL Server Management Studio is installed with SQL Express. It can be opened by the user that installed the SQL Express, but if needed, the SA Password is set to ShippingSolutions01.

Install Shipping Solutions Client Software and Connect to the SQL Server

Use the link provided to download the client software on each individual workstation. The file for Shipping Solutions Professional is called **sspro_9Xm_setup.exe**, and the file for Shipping Solutions Classic is called **sspro_8Xm_setup.exe** where X stands for the version number. Double-click and install the software.

Setting the Database Connection on the Shipping Solutions Multi-User Version



Open Shipping Solutions by double-clicking on the icon on your desktop. A message will pop up telling you that you do not have a valid database connection. Click **OK** or **Admin** until the server connection box pops up. Set the server connection string on each client:

1. In the server box, type the name of the SQL Server. If you installed SQL Express from the link we provided, the name of the SQL Server will be the name of the computer where it was installed and then **\SQLEXPRESS**.
2. If you are using SQL Server's built in security (if you are using a Trusted Connection, skip this step):
    a. Uncheck the **Trusted Connection** box.
    b. Type in the User Name and password you created as described here. You can also use the default username, sa, and the password, ShippingSolutions01.
    c. If you want the User Name and Password encrypted in the connections.config file, check the **Encrypt** box.
3. Click **Test Connection**.
4. In the database box, choose **ssdata_sql_01**.
5. Click **Test and Save**.

The software will close. When you reopen the software, it should ask you to login. The default User Name is "Admin," and the default Password is "password." This logs you into the software and is completely separate from the SQL Server login.

The registration screen will pop up. You can register the software using the code provided, or you can click **Register Later**. You have 30 days to register.

Configuring the Windows Firewall to Allow Connections to the SQL Database

If you are having trouble connecting to the Shipping Solutions database, it could be that your user does not have rights to the database, or it could be that the user cannot connect to the server.

If the error message says that the user does not have access to the database, grant the user the following rights in SQL Server Management Studio: db_accessadmin, db_datareader, db_datawriter and db_owner.

If the error message says that the server cannot be found, it may help to configure the Windows Firewall to allow for connections using Ports 1433 and 1434. The following steps outline how to open those ports on computers running Windows 7 and higher.

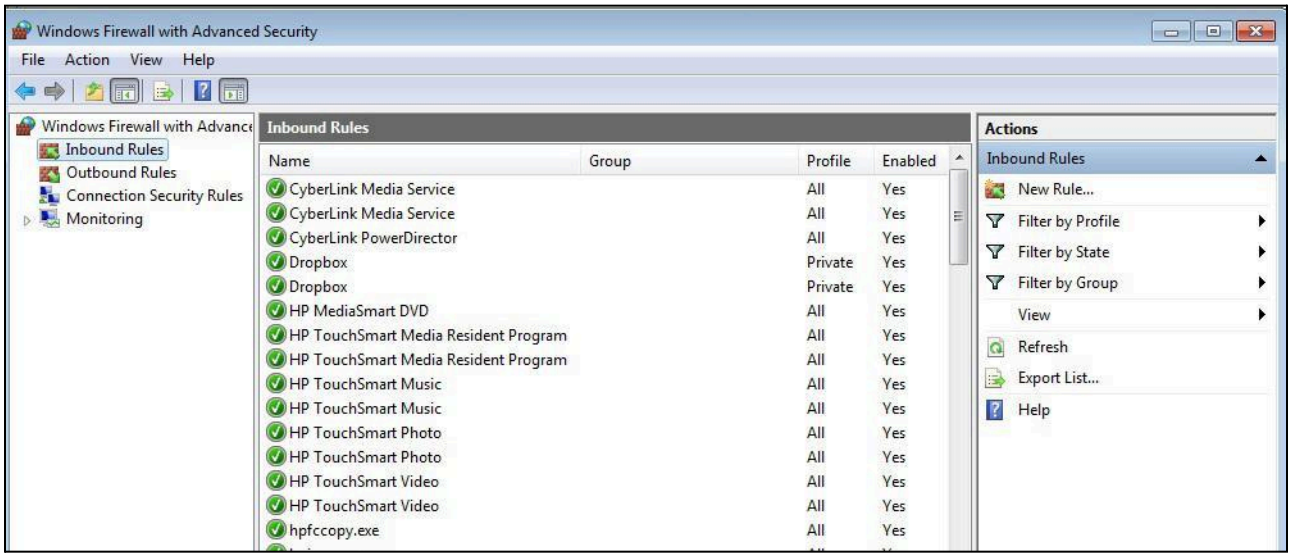
Opening Ports

Rules that govern access to the computer's resources need to be created. There are rules that control both incoming and outgoing data, so you must create rules for both directions on the ports and programs where access is needed. You will need to create both inbound and outbound rules for:

- The SQL Server;
- The SQL Browser;
- Port 1433; and
- Port 1434

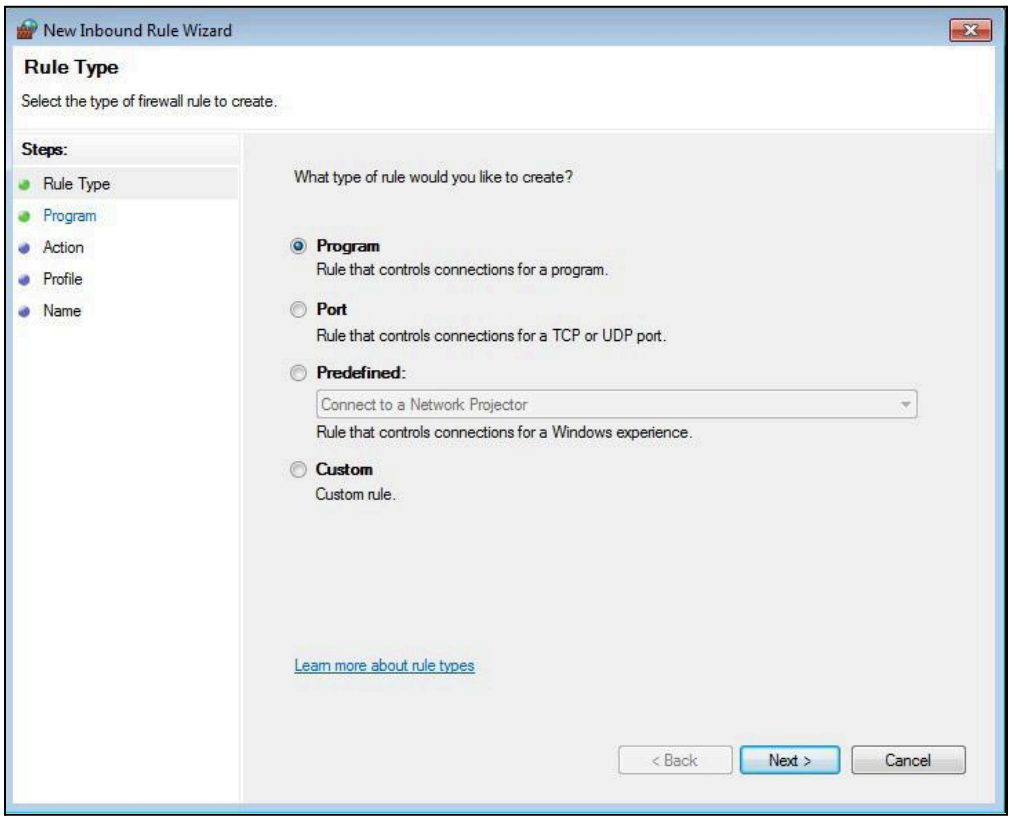
Begin by setting the inbound and outbound rules for the SQL Server. Navigate to the Start->Control Panel ->Administrative Tools. Double click on **Windows Firewall with Advanced Security**. The window is shown below.

Windows Firewall with Advanced Security Window



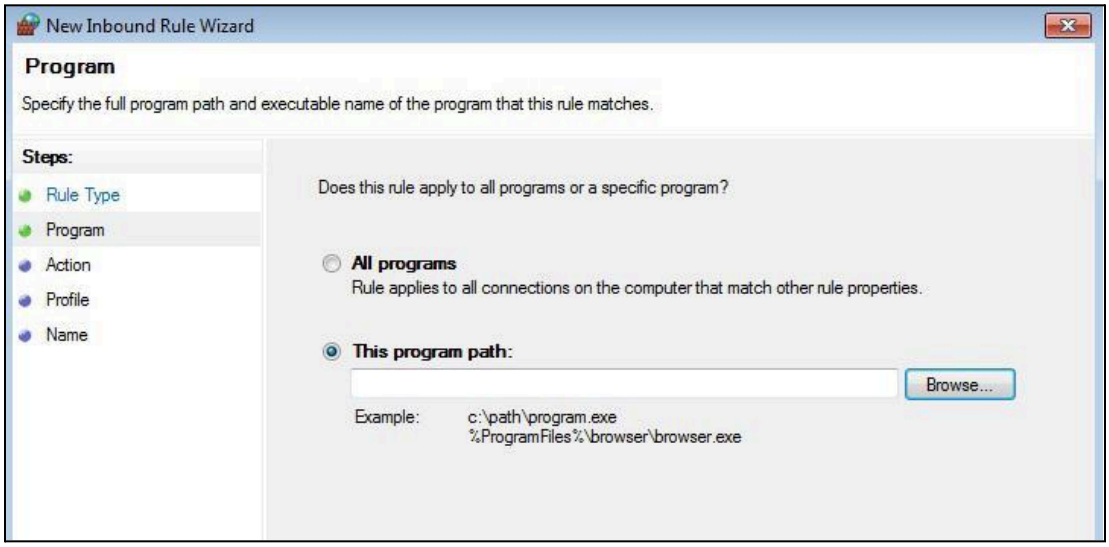
Begin by selecting **Inbound Rules** from the left column and clicking on **New Rule** from the right column. This will open a New Inbound Rule Wizard window.

New Inbound Rule Wizard Window 1



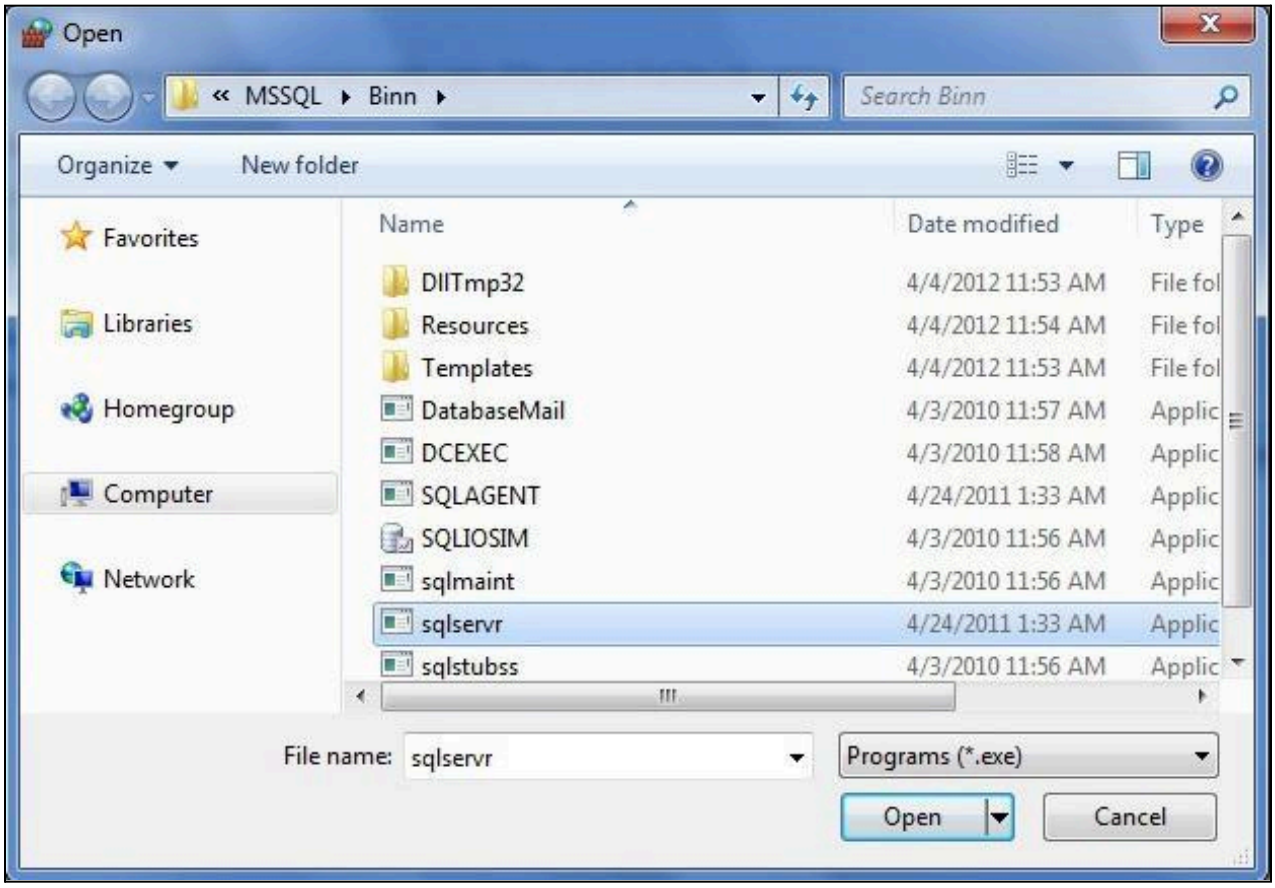
Select **Program** and then click **Next**. This will open the next window in the Wizard.

New Inbound Rule Wizard Window 2



Select **This program path** and click the **Browse** button. This will open the navigation window pictured below.

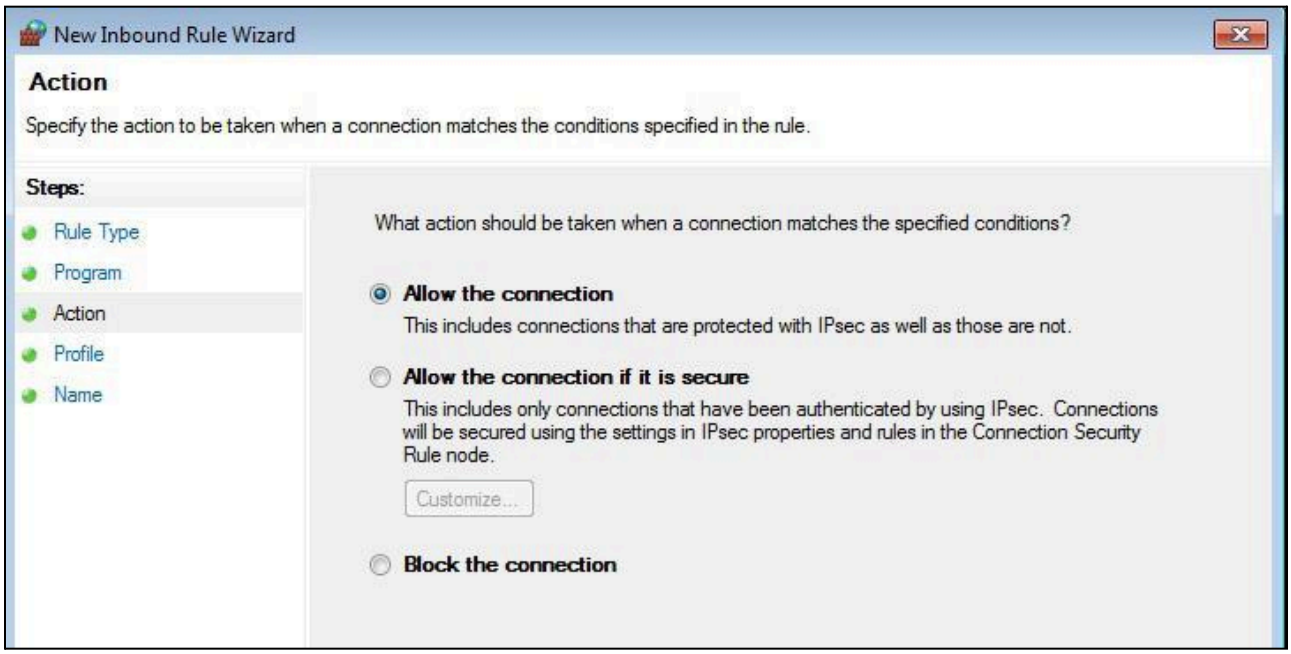
New Inbound Rule Wizard Window 3



In the **Open** window, navigate to the following:
C:\Program Files\Microsoft Sql Server\MSSQL10_50.SQLEXPRESS\MSSQL\Binn\. (If you have a Windows 7 64-bit computer your path may begin with C:\ProgramFiles (x86)\ instead of C:\Program Files\.)

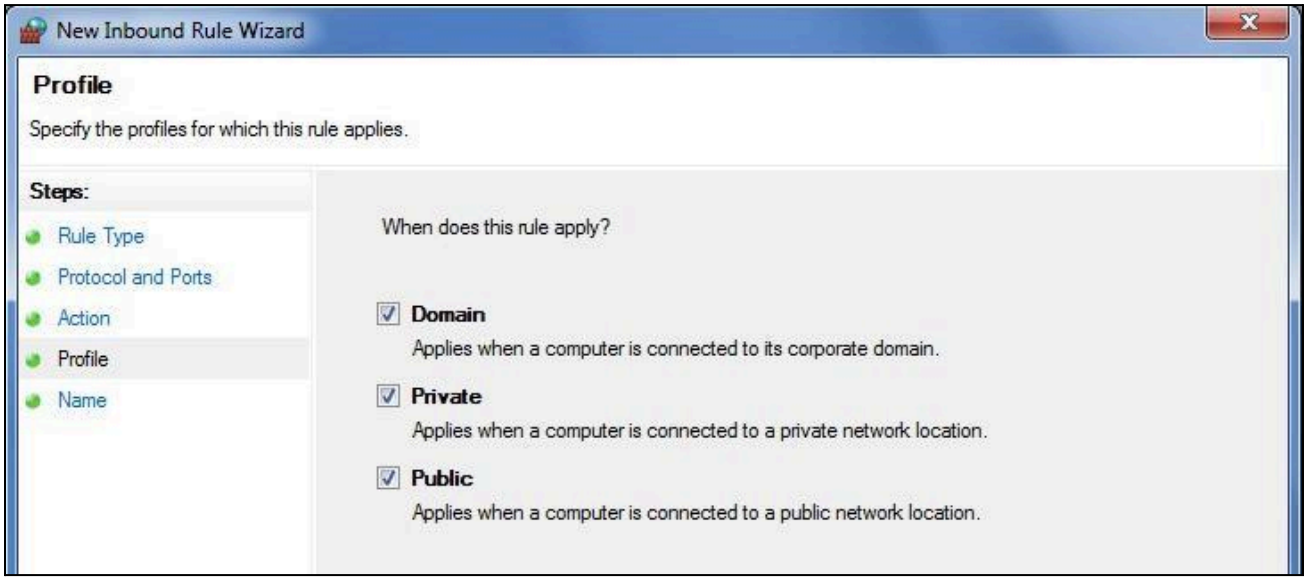
Click on **sqlsrver** (or **sqlsevr.exe**) and click **Open**. The navigation window will close, and you will return to the **New Inbound Rule Wizard Window 2** pictured above. Click on **Next**.

New Inbound Rule Wizard Window 4



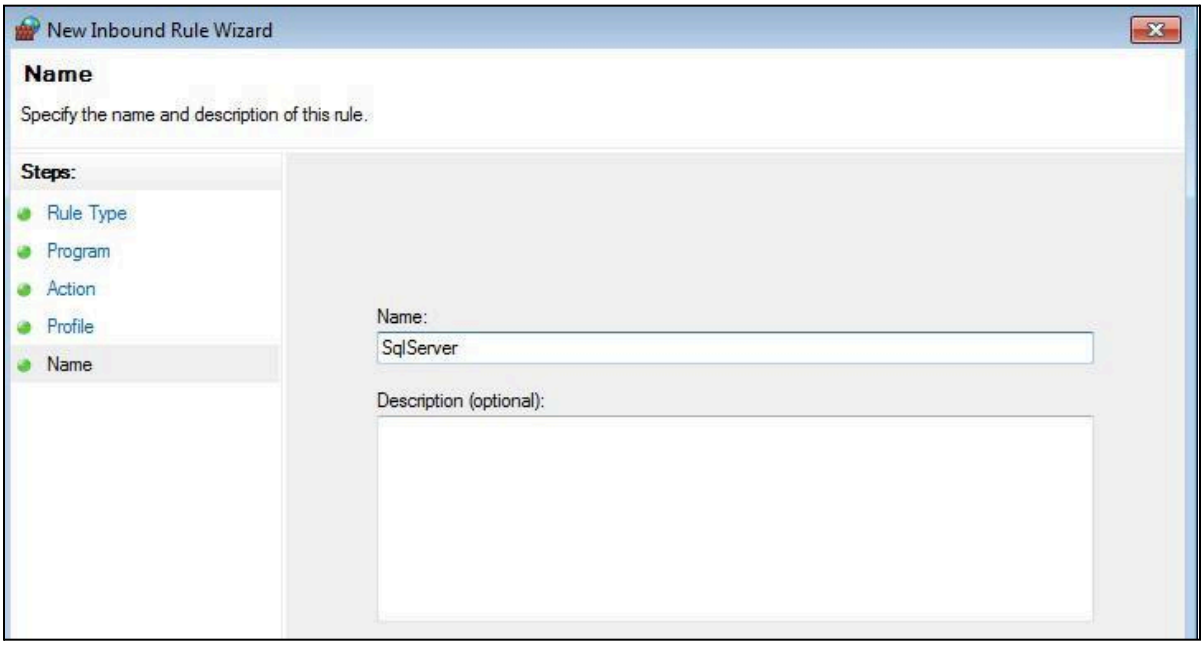
Make sure **Allow the connection** is selected and click **Next**.

New Inbound Rule Wizard Window 5



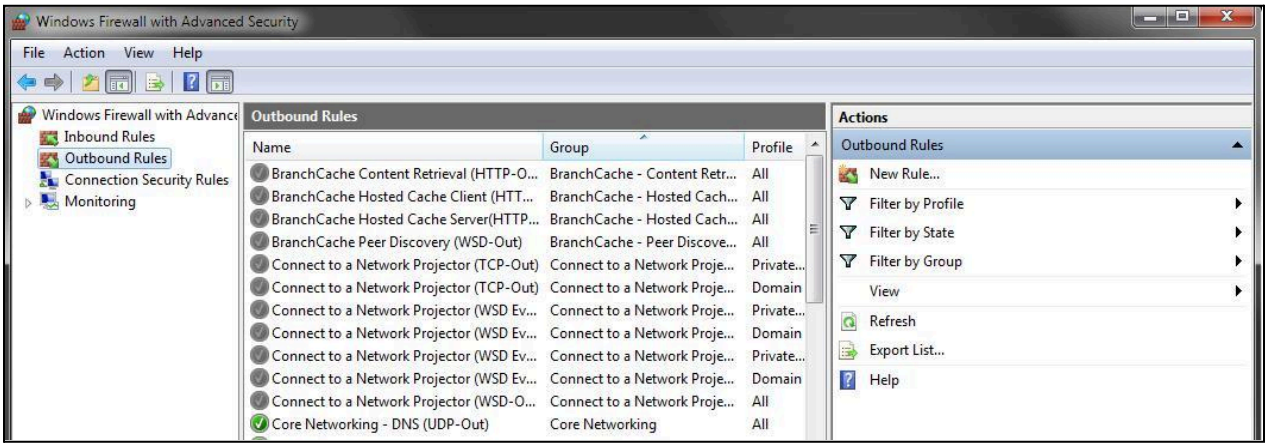
Leave all the boxes checked and click **Next**.

New Inbound Rule Wizard Window 6



Enter **SqlServer** as the name. You may also enter an optional description. Click **Finish,** which will return you to the **Windows Firewall with Advanced Security** window where your entry will appear at the top of the main window.

New Outbound Rules Wizard

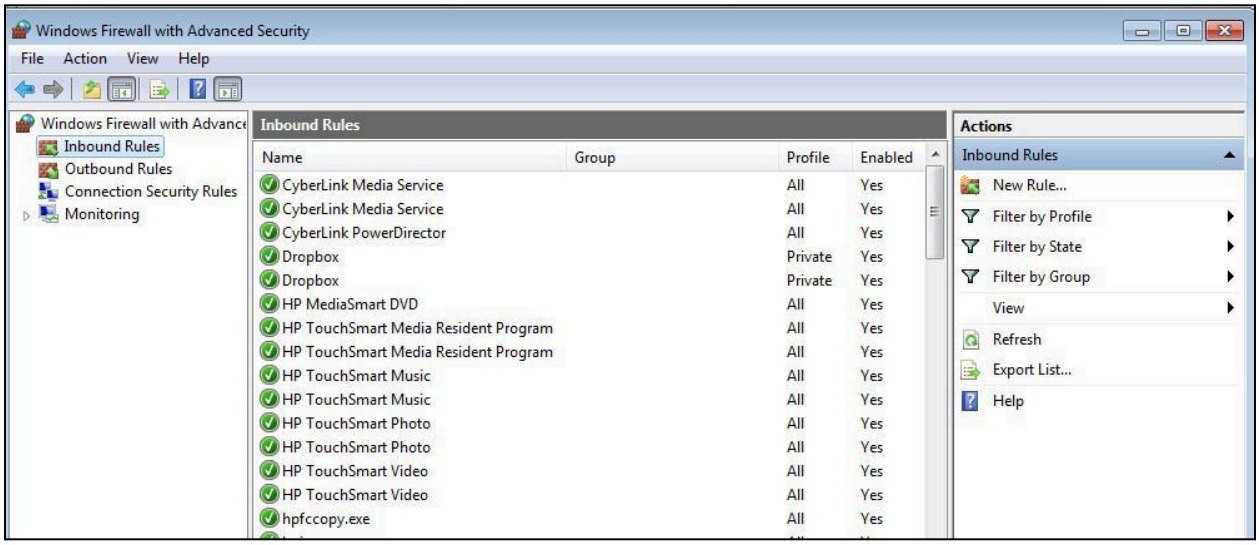


Now that you've created the inbound rule for the SQL Server, you need to create the outbound rule. From the **Windows Firewall with Advanced Security** window, click **Outbound Rules** from the left and **New Rule** from the right and repeat the steps you followed when creating the inbound rules:

1. On the **Rule Type** screen, select **Program** then click **Next**.
2. On the **Program** screen, select **This program path** and click the **Browse** button, which will open a search window.
3. From the search window, navigate to the following: C:\Program Files\Microsoft Sql Server\MSSQL10_50.SQLEXPRESS\MSSQL\Binn\. (If you have a Windows 7 64-bit computer your path may begin with C:\ProgramFiles (x86)\ instead of C:\Program Files\.)

4. Click on **sqlsrver** (or **sqlsevr.exe**) and click **Open**. The navigation window will close. Click on **Next**.
5. On the **Action** screen, make sure **Allow the connection** is selected and click **Next**.
6. On the **Profile** screen, leave all the boxes checked and click **Next**.
7. On the **Name** screen, enter **SqlServer** as the name. You may also enter an optional description. Click **Finish**. This will return to the **Windows Firewall with Advanced Security** window where your entry will appear at the top of the main screen.

Creating Inbound and Outbound Rules for the SQL Browser



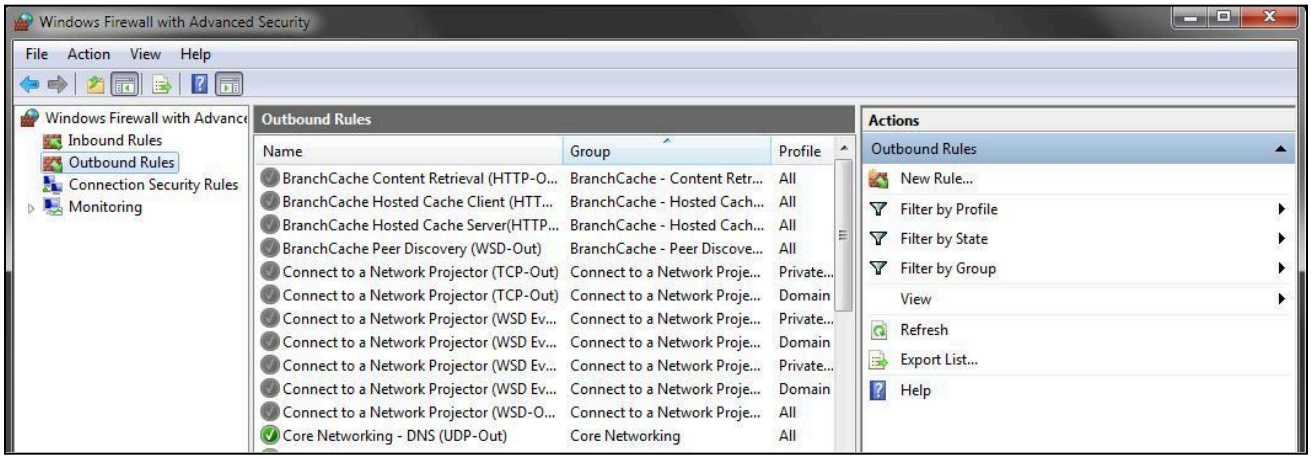
Next, create inbound and outbound rules for the SQL Browser.

Click **Inbound Rules** from the left and **New Rule** from the right and repeat the process:

1. On the **Rule Type** screen, select **Program** then click **Next**.
2. On the **Program** screen, select **This program path** and click the **Browse** button, which will open a search window.
3. From the search window, navigate to the following: C:\Program Files\Microsoft Sql Server\90\Shared\. (If you have a Windows 7 64-bit computer your path may begin with C:\ProgramFiles (x86)\ instead of C:\Program Files\.)
4. Click on **sqlbrowser** (or **sqlbrowser.exe**) and click **Open**. The navigation window will close. Click on **Next**.
5. On the **Action** screen, make sure **Allow the connection** is selected and click **Next**.
6. On the **Profile** screen, leave all the boxes checked and click **Next**.
7. On the **Name** screen, enter **SqlBrowser** as the name. You may also enter an optional description. Click **Finish**. Return to the Windows Firewall with Advanced Security screen where your entry will appear at the top of the main screen.

Now click **Outbound Rules** from the left and **New Rule** from the right and repeat steps 1-7 listed above.

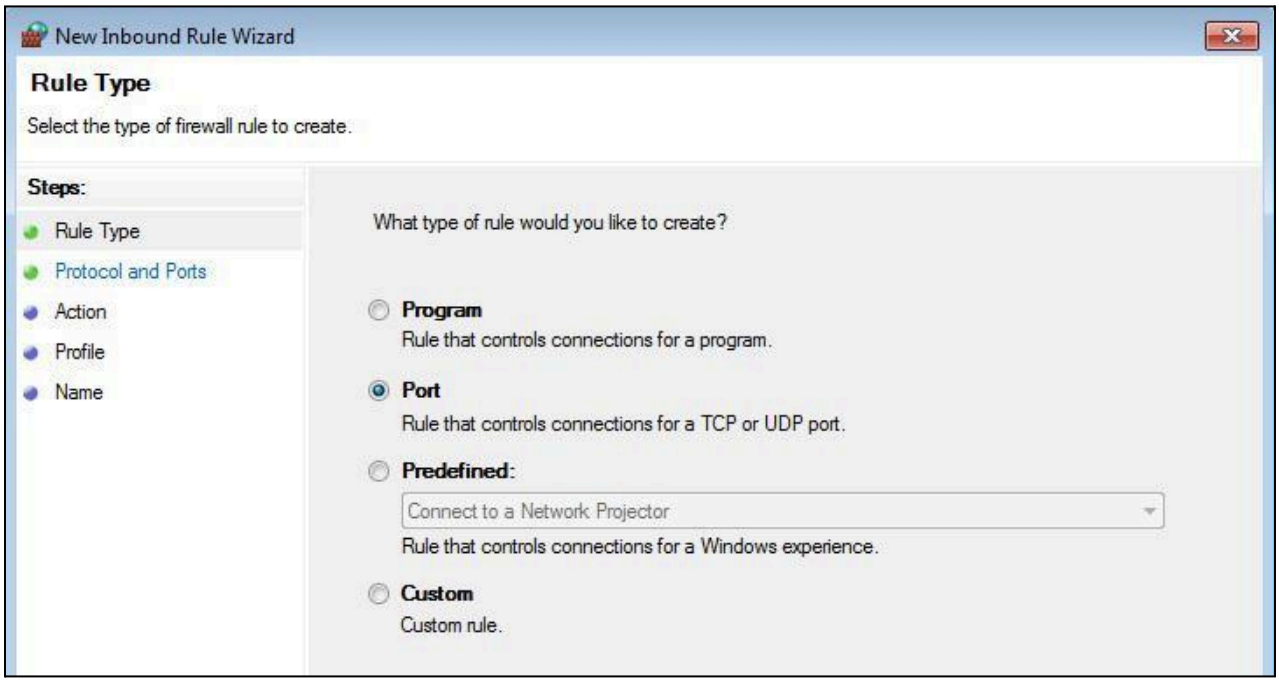
Creating Inbound and Outbound Rules for Port 1433



Next, create inbound and outbound rules for the ports of these programs.

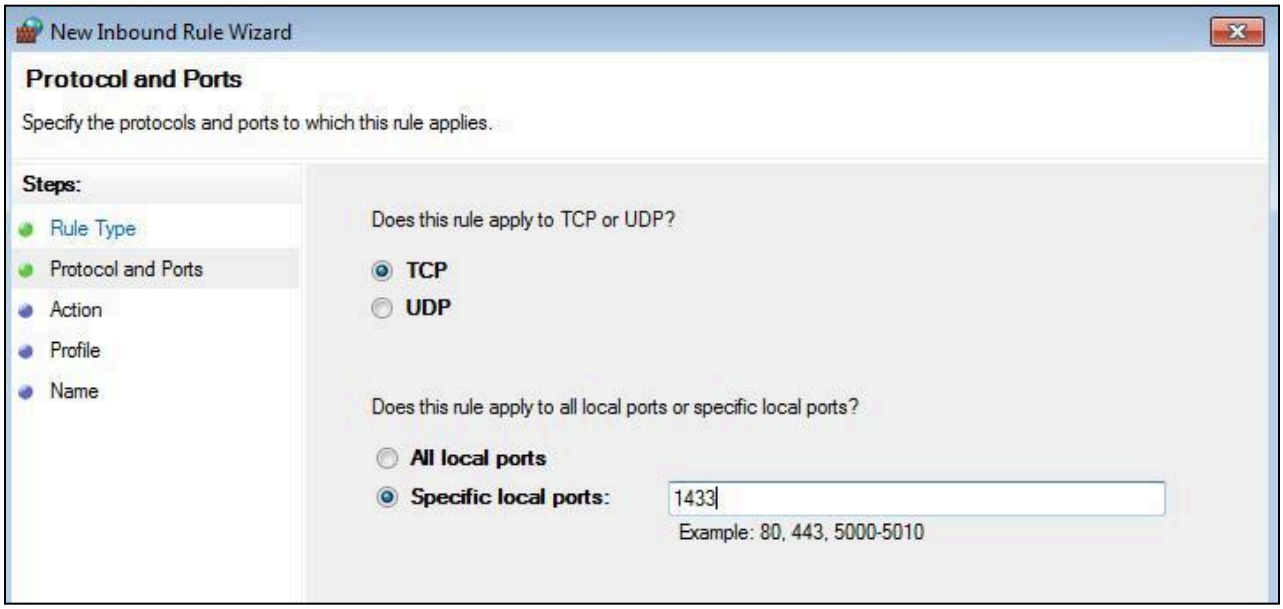
Select **Inbound Rules** from the left column, then **New Rule** from the right column. The **Rule Type** window will open.

New Inbound Port Wizard Window 1



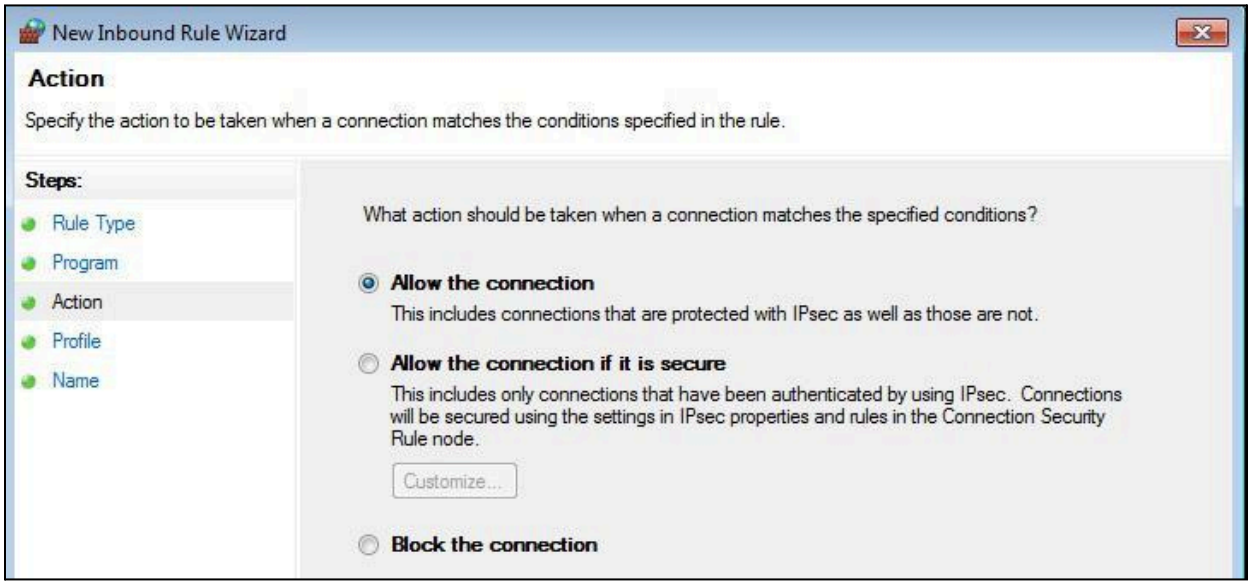
Select **Port** and then click **Next**. This will open the next **Protocol and Ports** window in the Wizard.

New Inbound Port Wizard Window 2



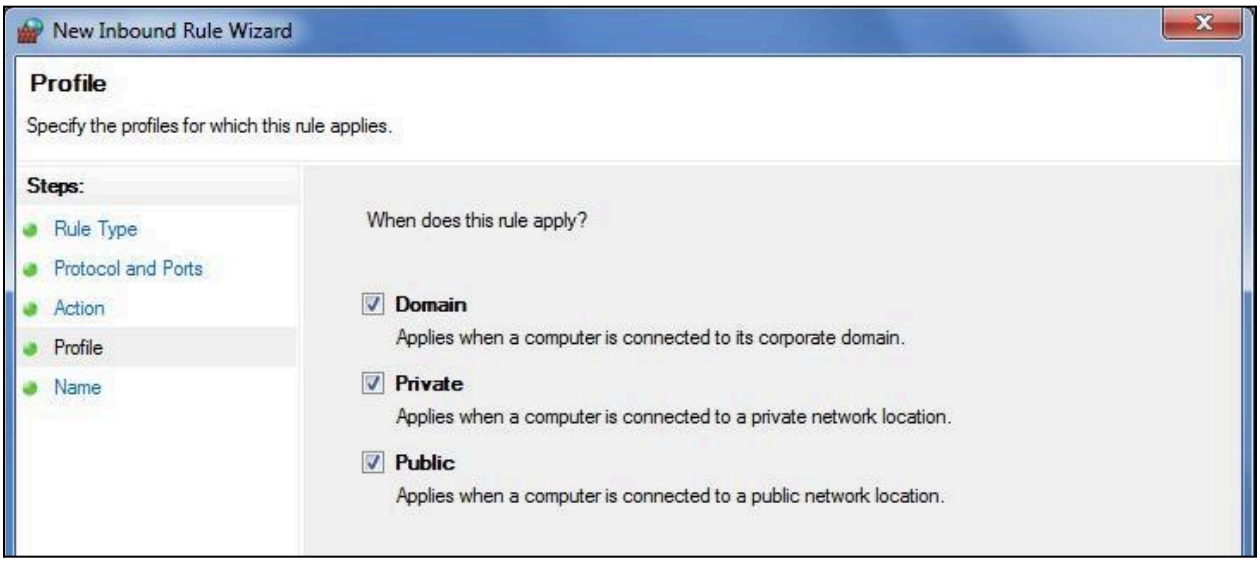
Choose **TCP**. Enter **1433** in the **Specific local ports** field and then click **Next**. This will open the **Action** window.

New Inbound Port Wizard Window 3



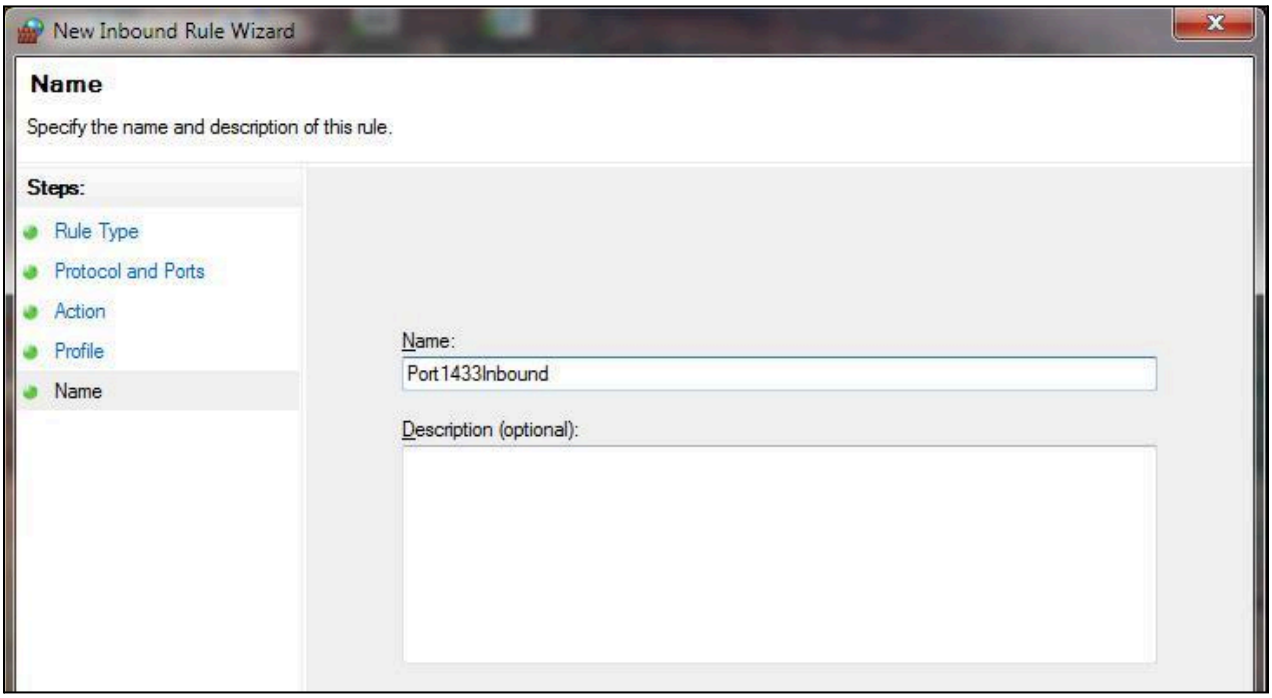
Make sure the **Allow the connection** option is chosen and then click **Next**.

New Inbound Port Wizard Window 4



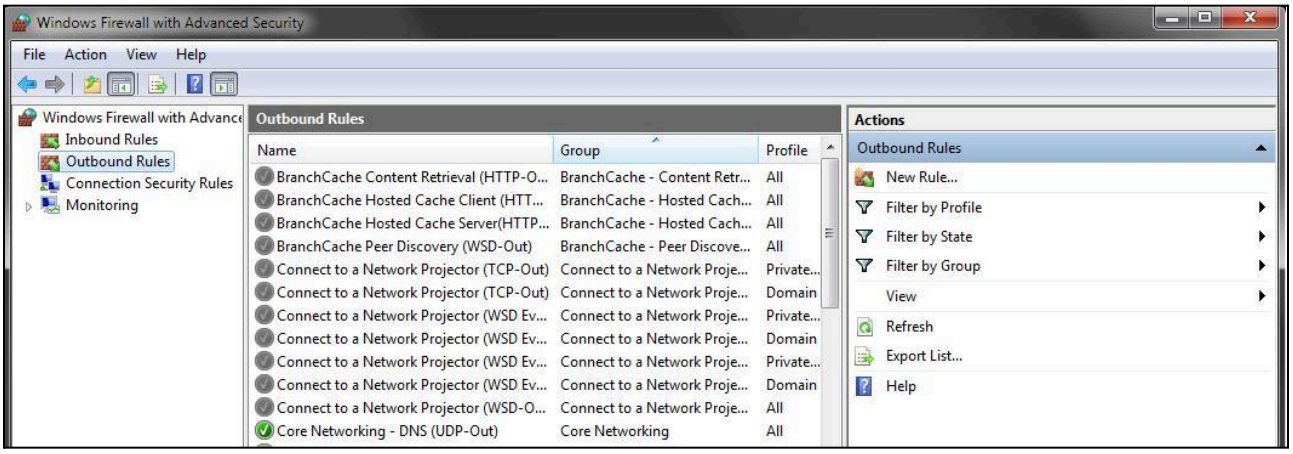
Leave all the boxes checked and click **Next**.

New Inbound Port Wizard Window 5



Enter the name as **Port1433Inbound**, an optional description, and click **Finish**. Return to the **Windows Firewall with Advanced Security** window where your entry will appear at the top of the main screen.

New Outbound Port Wizard



Now that you've created the inbound rule for Port 1433, you need to create the outbound rule. From the **Windows Firewall with Advanced Security** window, click **Outbound Rules** from the left and **New Rule** from the right and repeat the steps you followed when creating the inbound rules:

1. On the **Rule Type** screen, select **Port** then click **Next**.
2. On the **Protocol and Ports** screen, choose **TCP**. Enter **1433** in the **Specific local ports** box, then click **Next**.
3. On the **Action** screen, make sure **Allow the connection** is selected and click **Next**.
4. On the **Profile** screen, leave all the boxes checked and click **Next**.
5. On the **Name** screen, enter the name as **Port1433Outbound**, an optional description, and click **Finish**. This will return to the **Windows Firewall with Advanced Security** window where your entry will appear at the top of the main screen.

The last set of inbound and outbound rules you'll need to create are for Port 1434.

Click **Inbound Rules** from the left and **New Rule** from the right and repeat the process:

1. On the **Rule Type** screen, select **Port** then click **Next**.
2. On the **Protocol and Ports** screen, choose **UDP**. Enter **1434** in the **Specific local ports** box, then click **Next**.
3. On the **Action** screen, make sure **Allow the connection** is selected and click **Next**.
4. On the **Profile** screen, leave all the boxes checked and click **Next**.
5. On the **Name** screen, enter the name as **Port1434Inbound**, an optional description, and click **Finish**. Return to the **Windows Firewall with Advanced Security** window where your entry will appear at the top of the main screen.

Finally, click **Outbound Rules** from the left and **New Rule** from the right and repeat the process:

1. On the **Rule Type** screen, select **Port** then click **Next**.
2. On the **Protocol and Ports** screen, choose **UDP**. Enter **1434** in the **Specific local ports** box, then click **Next**.
3. On the **Action** screen, make sure **Allow the connection** is selected and click **Next**.
4. On the **Profile** screen, leave all the boxes checked and click **Next**.
5. On the **Name** screen, enter the name as **Port1434Outbound**, an optional description, and click **Finish**.

To ensure that all eight inbound and outbound rules were created properly, go to the **Windows Firewall with Advanced Security** window. Click on **Inbound Rules**. You should see the following rules listed:

A. Sqlserver
B. Sqlbrowser
C. Port1433Inbound
D. Port1434Inbound

Click on **Outbound Rules** and look for the corresponding outbound rules. If any of the rules are missing, go back to the earlier procedures and add them. You may now close **Windows Firewall with Advanced Security.**

Shipping Solutions Professional Main Menu



Configuring Shipping Solutions

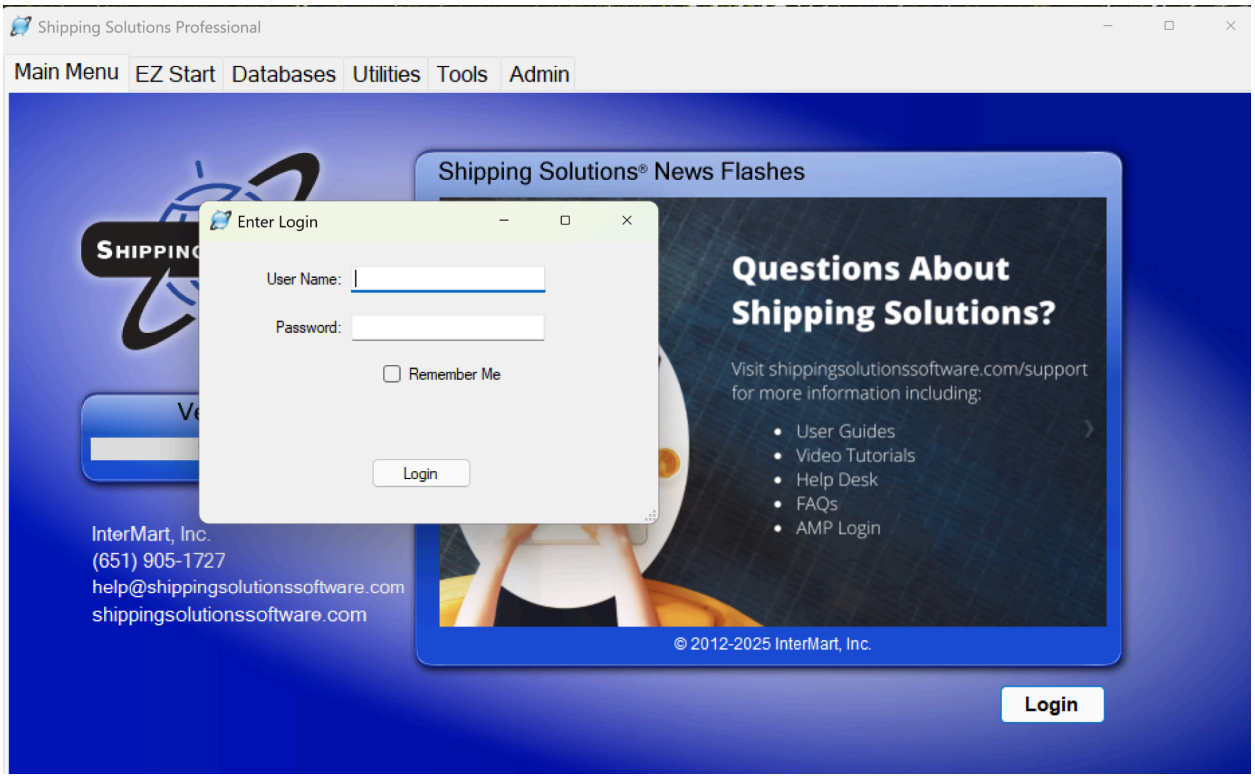
When you start up the Shipping Solutions software, you will see the **Main Menu** tab with the version number of the software and our customer service contact information. The tabs across the top of the screen take you to the **EZ Start** tab, where you can create your shipments; the **Databases** tab, where you can store your contact and product information; and the **Utilities**, **Tools** and **Admin** tabs.

The first time you click on one of these tabs, you will be asked to register the Shipping Solutions software. Enter the registration code provided as well as your contact information. If you don't know your code, send an email to help@shippingsolutionssoftware.com. You have 30 days to complete the registration process.

If you installed the multi-user version, you may want to set up user accounts. Shipping Solutions Professional allows you to assign different access rights to different users of the software. So, for example, you can have some users who can enter and change data for each shipment record while other users can only print out the forms. You can proceed to the next section of this User Guide for instructions on logging in and setting up user accounts.

If you have installed the single-user version of Shipping Solutions, the software automatically assigns full administrative rights to the program so the user can access all the functions available in Shipping Solutions. You can skip the next couple sections of the User Guide and go directly to **Adding Signatures and Logos** here.

Shipping Solutions Professional Multi-User Version Login Screen



Shipping Solutions Multi-User Version: Setting Up Logins and User Accounts

When you start up the multi-user version of Shipping Solutions for the first time, a login screen for Shipping Solutions may appear. If not, click on **Login** at the bottom of the main screen. Start by logging in with the default user name of **Admin** and the password of **password**. Click the **Admin** tab and then **User Accounts**. You may want to change the password for the Admin user name.

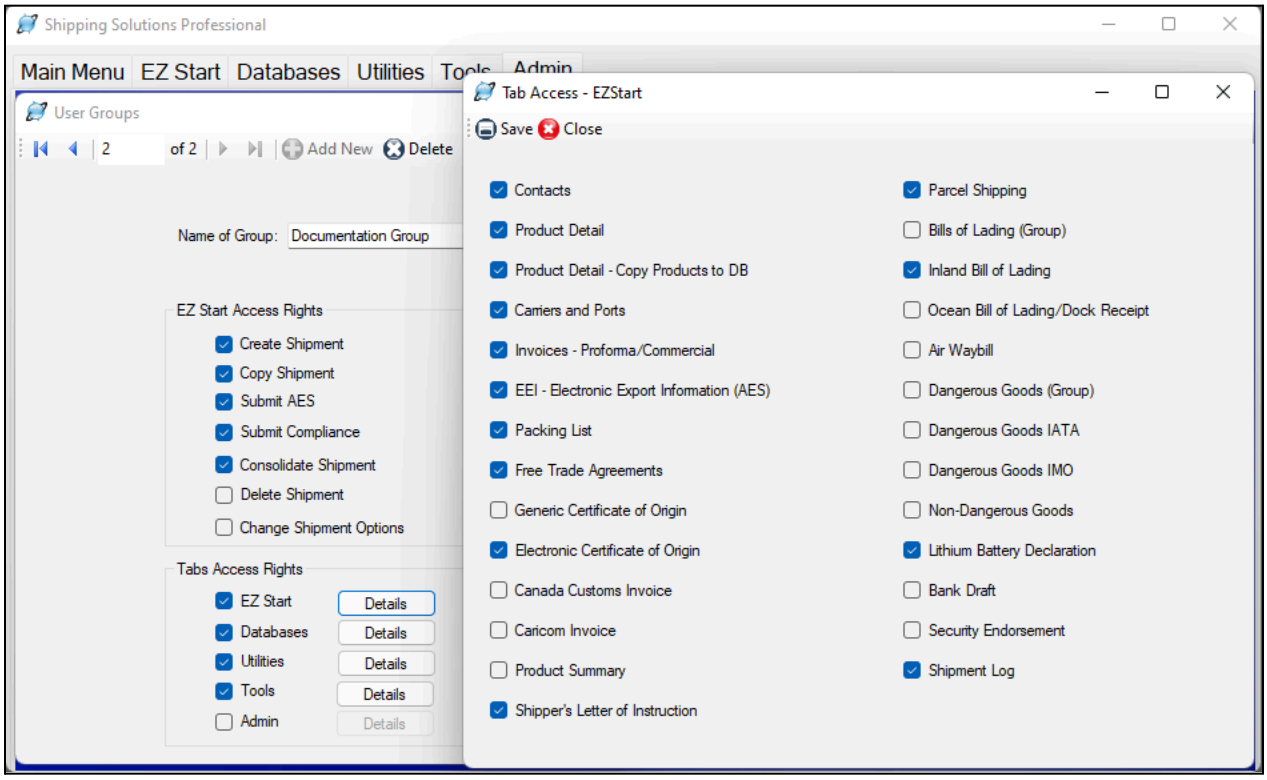
You may now create user accounts for each of your users. By assigning different user accounts you can grant different access rights to each user, and each user can have a different profile where their signature and compliance login can be stored.

On the User Accounts screen, click **Add New**. Enter a user name, first name, last name, and password. Choose the default profile and Admin group. You can come back later to make changes to the Group and Profile, which are discussed in more detail in the next few sections of the User Guide. Click **Save**. Repeat the process for each user.

If, however, you want all users to have the same access rights, use the same signatures and logos, use the same compliance login, and use the same email for AES System responses, then all users can share the Admin user account. If all users are using the Admin login you can skip the section on User Groups because the Admin user is part of the Admin group, and this cannot be changed. Instead you can proceed to the **Add Signatures and Logos** section here.

You can modify these settings and create new user accounts at any time.

Set Up Access Rights for User Groups on the Admin Tab



Setting Up User Groups (Multi-User, Professional Only)

If you want to limit rights for certain users, you can set-up different user groups. Click the **Admin** tab and then **User Groups**. The Admin group is already set-up with full access rights. You cannot change the Admin group. If you want all users to have full access to Shipping Solutions, you do not need to create any additional groups.

If you want different user groups, however, click **Add New**. Enter a group name and check the boxes to allow access to different parts of the software broken out into **EZ Start Access Rights**, which are primarily the various functions available on the EZ Start Toolbar, and **Tabs Access Rights**, which allows access to various screens that are part of each tab.

EZ Start Access Rights:

Create Shipments
This allows the user to create a new shipment on the **EZ Start** tab.

Copy Shipment
This allows the user to copy a previous shipment record on the **EZ Start** tab.

Submit AES
This gives the user access to the **AES** button at the top of the **EZ Start** tab. It allows you to file your shipment information with the U.S. Census Bureau via AESDirect located on the Automated Commercial Environment (ACE) Portal.

Submit Compliance
This gives the user the ability to run compliance screenings from the **EZ Start** tab if that user has registered for the Export Compliance Module and has received a user name and password and your company has an active Annual Maintenance Program (AMP) subscription. The Export Compliance Module includes Document Determination, Export License Determination, and Restricted Party Screening.

Consolidate Shipments
This gives the user the ability to combine multiple shipment records in Shipping Solutions into a single set of export forms that can be previewed, printed and emailed as well as submitting the data from this consolidated shipment to AES and to run compliance screenings for this shipment.

Delete Shipment
This allows the user to delete a shipment from the **EZ Start** tab.

Change Shipment Options
This allows the user to click on the **Change Shipment Options** button on the **EZ Start** tab and change the **Shipment Number**, **Profile** or **Search Tag**.

Tab Access Rights:

A **Details** button is next to the name of each Shipping Solutions tab. When you grant access to a specific tab by clicking on the check box for that tab you can further refine access rights by clicking on the **Details** button and granting or denying access to each individual screen within that tab. Those tabs include:

EZ Start
This gives the user access to the various screens located in the **EZ Start** tab, which are used to add, modify or delete data for each individual shipment record.

Databases
This gives the user access to the **Databases** tab where they can add, change or delete contact and product information.

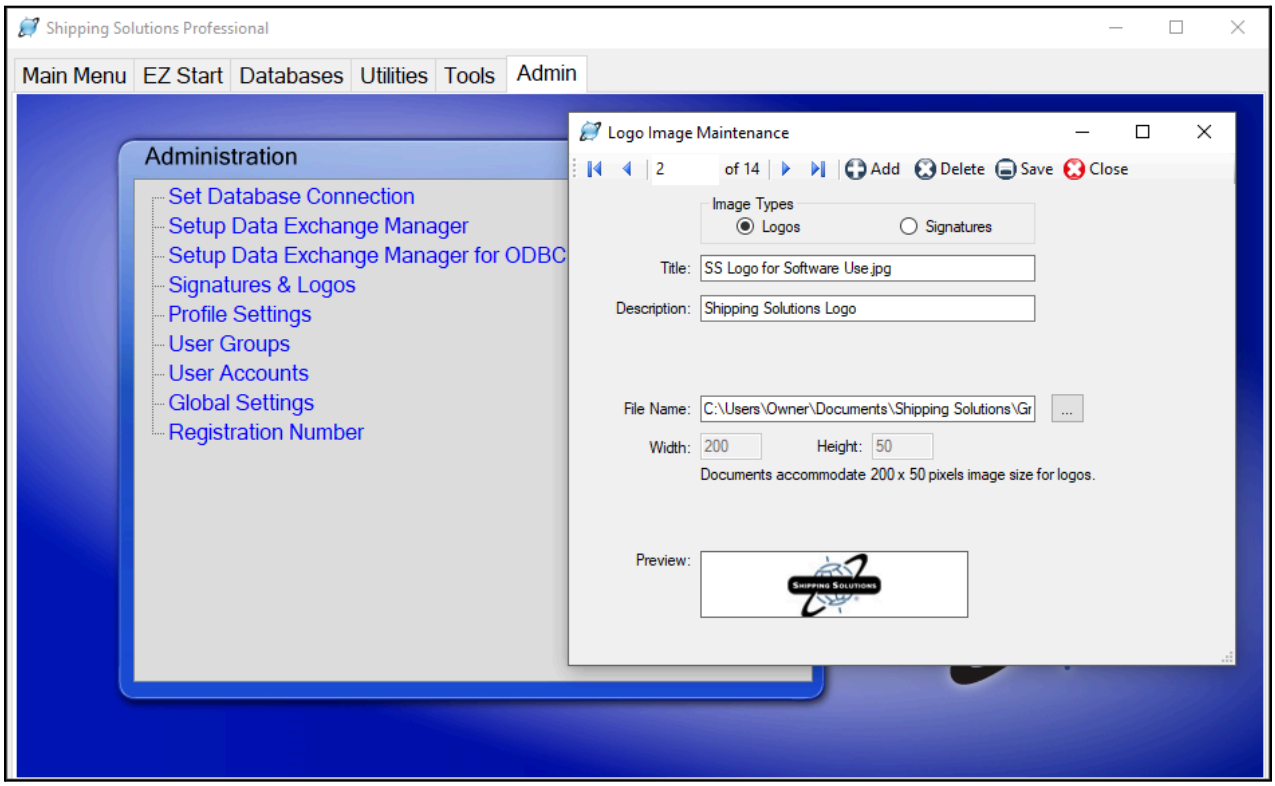
Utilities
This gives the user access to the **Utilities** tab where they can use the **Conversion Calculator**, generate reports, print shipping labels, and generate XML data files for Canadian Customs.

Tools
This gives the user access to the **Tools** tab where they can run the **Data Exchange Manager**, import and export contact and product databases, backup the database, delete blocks of shipments, lock and unlock shipments, and customize the documents.

Admin
This gives the user access to the **Admin** tab where they can set the SQL database connection, set up the **Data Exchange Manager**, add signatures and logos, and create profiles, user groups and user accounts.

Click **Save**. Repeat the process for as many user groups as you need. Then close the **User Groups** screen and click on **User Accounts**. For each user account, choose the proper group from the **Assign to Group** dropdown list.

Anyone who has been granted user rights to the Admin tab will be able to create new user groups or modify existing user group settings at any time.



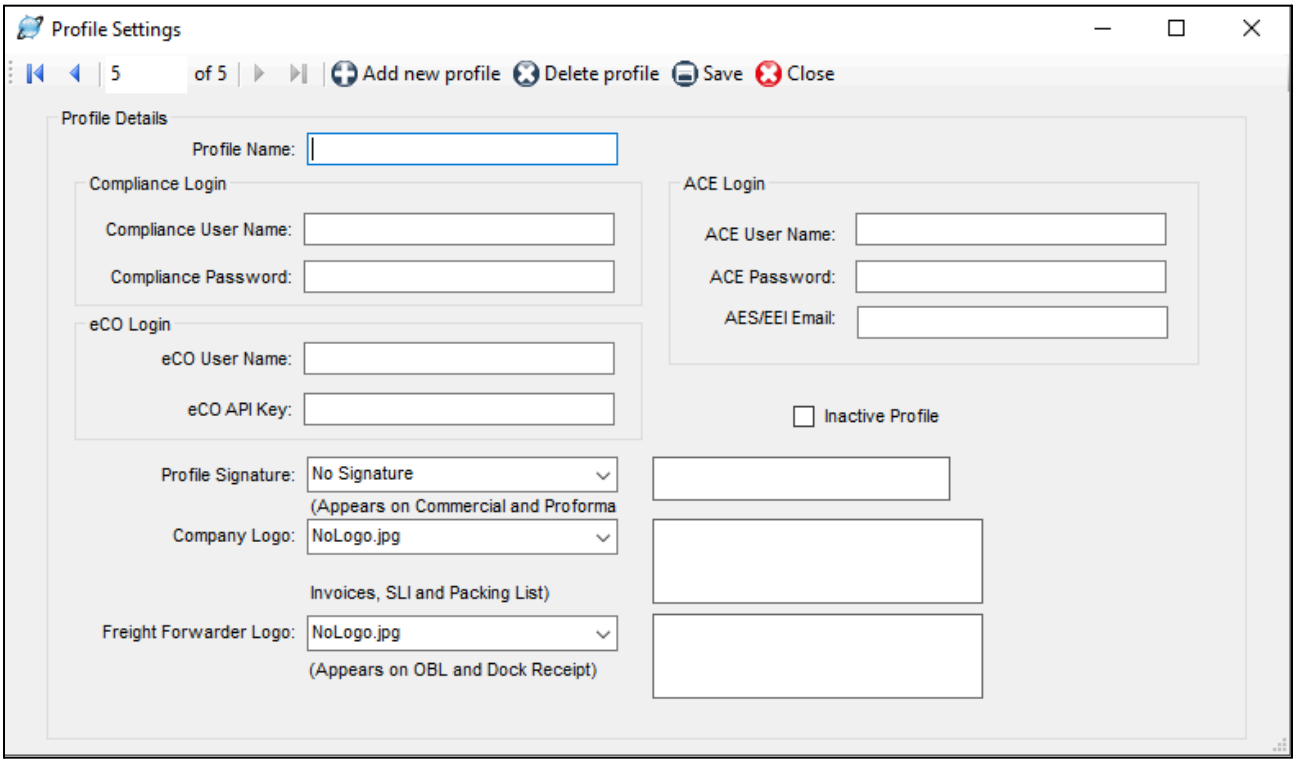
Adding Signatures and Logos

Shipping Solutions gives you the option of adding a company logo and an individual's signature to multiple export documents (see the chart below), but first they must be loaded into the software. To load a signature or logo into Shipping Solutions, click the **Admin** tab and then **Signatures & Logos**. Choose the appropriate image type (Logo or Signature) and click **Add**. Enter a title for the image, an optional description, and then click on the button next to **File Name** to locate your image. The image can be a .bmp, .jpg, or .png file. The size for the logo file is 200x50 pixels, and the size for the signature file is 180x25 pixels.

Documents with Signatures and Logos Available				
Document	Signature	Name	Title	Logo
Air Waybill (regular & data only)	YES	NO	NO	NO
Australia FTA Certificate of Origin	YES	NO	NO	NO
CAFTA-DR FTA Certificate of Origin	YES	NO	NO	NO
CARICOM Invoice	YES	NO	NO	NO
Certificate of Origin (Generic)	YES	YES	YES	Exporter Logo
Chile TPA Certificate of Origin	YES	NO	NO	NO
Colombia FTA Certificate of Origin	YES	NO	NO	NO
Commercial Invoice (all versions)	YES	NO	YES	Exporter Logo
Dock Receipt (with Product Summary or Product Detail)	NO	NO	NO	Freight Forwarder Logo
Inland Bill of Lading (with Product Summary or Product Detail)	YES	NO	NO	NO
Japan FTA Certificate of Origin	YES	YES	YES	NO
Korea FTA Certificate of Origin	YES	NO	NO	NO
Ocean Bill of Lading (with Product Summary or Product Detail)	NO	NO	NO	Freight Forwarder Logo
Packing List	YES	NO	NO	Exporter Logo
Panama TPA Certificate of Origin	YES	YES	YES	NO
Peru TPA Certificate of Origin	YES	YES	YES	NO
Proforma Invoice (all versions)	YES	NO	YES	Exporter Logo
Shipper's Letter of Instruction (in NCBFAA and SED formats)	YES	YES	YES	NO
Shipper's Letter of Instruction (with Product Summary or Detail)	YES	NO	YES	Exporter Logo
Singapore FTA Certificate of Origin	YES	YES	YES	NO
USMCA (all versions)	YES	YES	YES	Exporter Logo

Please Note: The signatures that will appear on your export paperwork are scanned facsimiles of your signature. They do not have the same legal standing as a real signature and should not be used as such. Shipping Solutions provides this option for the convenience of our users. We strongly recommend that you consult an attorney before deciding to use electronic versions of actual signatures.

Creating User Profiles



Setting Up Profiles and Assigning Them to Users

Profiles allow you to set logos, signatures and more for each user account that you create in Shipping Solutions. The **Default Profile** is already set-up. If you want all users to use the same profile you can simply modify the data fields described below for the **Default Profile**. However, if you want to assign different profiles to different user accounts, click the **Add new profile** button, assign a **Profile Name,** and modify the following fields:

Compliance Login (Not available in Shipping Solutions Classic)

This is the username and password that allows you to run the Export Compliance Module through the Shipping Solutions software (more information here). You must have an active Annual Maintenance Program to use the Export Compliance Module. You run the Export Compliance Module by clicking on the **Compliance** button on the **EZ Start** screen. You can enter your user name and password directly on that screen, but if you enter it here it will be saved and you won't need to re-enter it again.

ACE Login

Enter your user name and password for the ACE portal, so you won't need to type it every time you file through AESDirect. Since ACE requires you to change your password every 90 days, you will need to update it here after changing it.

AES/EEI Email

This is the email address to which the ACE Portal will send email confirmation of a successful AES filing along with the shipment's ITN number. If you want the email sent to multiple email addresses, you can enter them here separated by a comma.

eCO Login

When you register for the electronic Certificate of Origin (eCO) service, the American World Trade Chamber of Commerce (AWTCC) will send you an email with a link to reset your portal password. Enter your email address and portal password here. For more information on the eCO process, see here.

Profile signature

Choose the signature you want to use with this profile from the drop-down list. The signatures you added earlier using the **Signatures & Logos** screen will appear in the drop-down list. The signature will appear on the documents as shown in the chart on the previous page.

Company Logo

Choose a logo from the drop-down list that you entered earlier using the **Signatures & Logos** screen. This is the logo that will appear on the commercial and proforma invoices, the packing list and the shipper's letter of instruction.

Freight Forwarder Logo

Choose a logo from the drop-down list that you entered earlier using the **Signatures & Logos** screen. This is the logo that will appear on the ocean bill of lading and dock receipt.

For the profiles to be used, you must go to the **User Accounts** screen and assign each user account the appropriate profile. Each time that user creates a new shipment on the **EZ Start** tab, the profile assigned to that user will be assigned to that shipment.

You can create new profiles any time you have a change; for example, a new company logo. Creating a new profile rather than changing an existing profile will keep older shipments intact with their original profiles. If a profile is no longer needed you can check the **Inactive Profile** box. This is preferable to deleting the profile as it will then remain in effect on any shipments that used the now inactive profile.

Any shipment created by a user account will be given the profile assigned to that user. You can also change the profile assigned to an individual shipment by going to the **EZ Start** screen, finding the shipment, and clicking on **Change Shipment Options**.

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 plus our contact information.

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 section 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; setting defaults that will apply to all users, such as automatically calculating the total weight of your items on the packing list; and registering your software with InterMart.

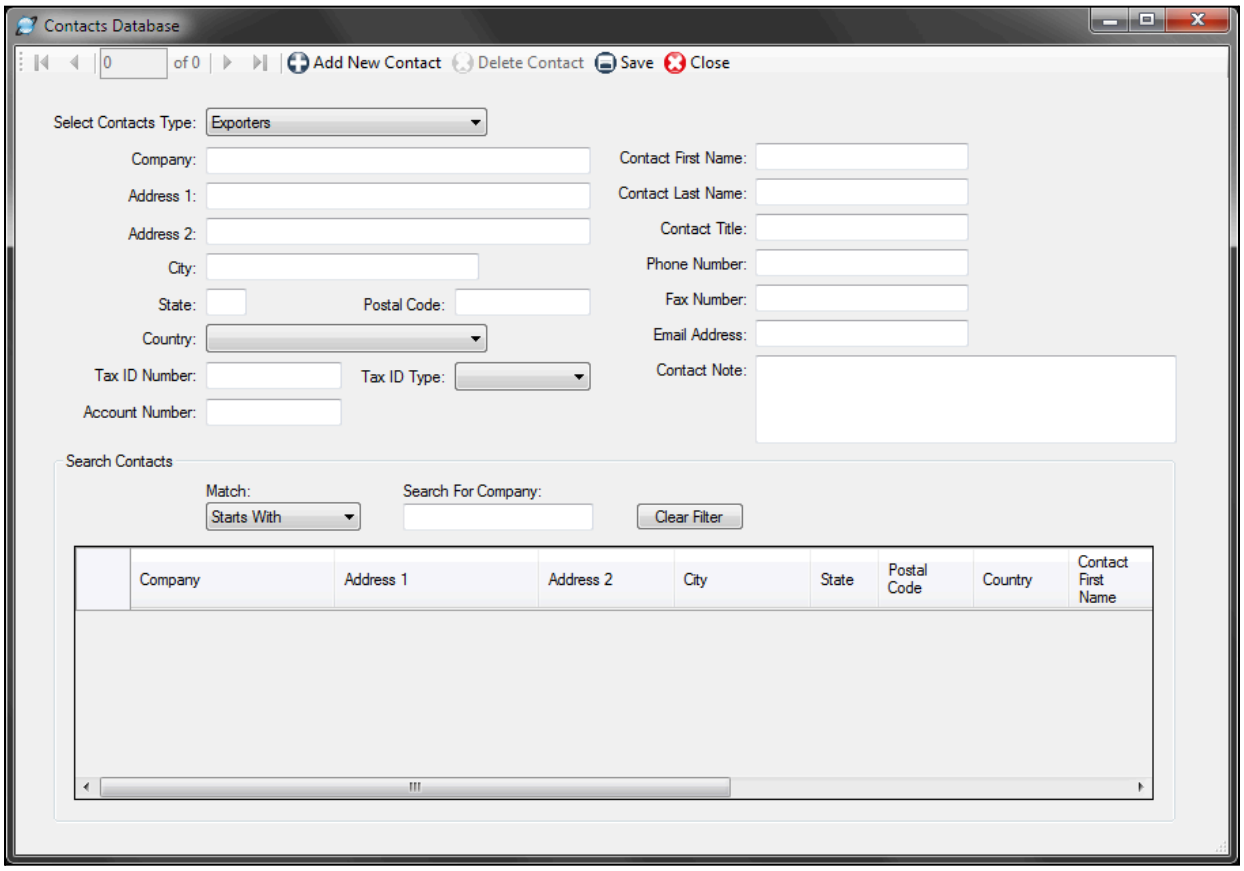
Populating the Databases

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 here.

Contacts Database Screen

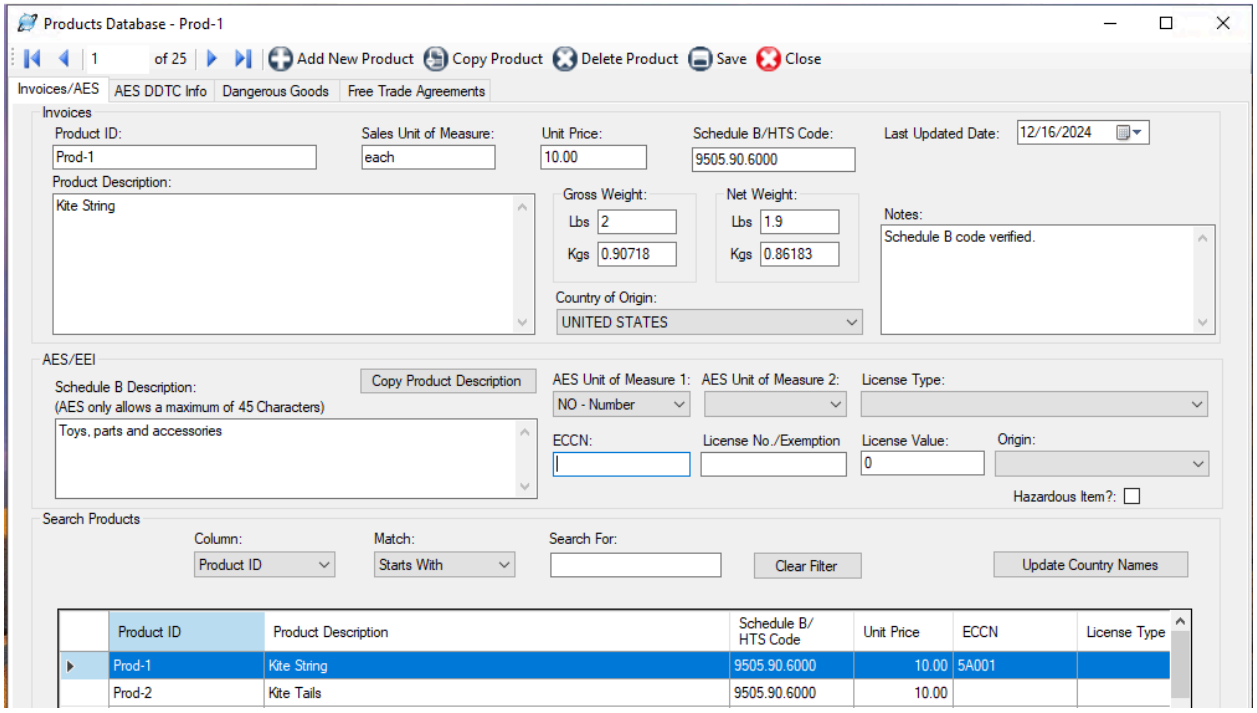


Follow the steps below to manually add items to the **Contacts Database**:

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

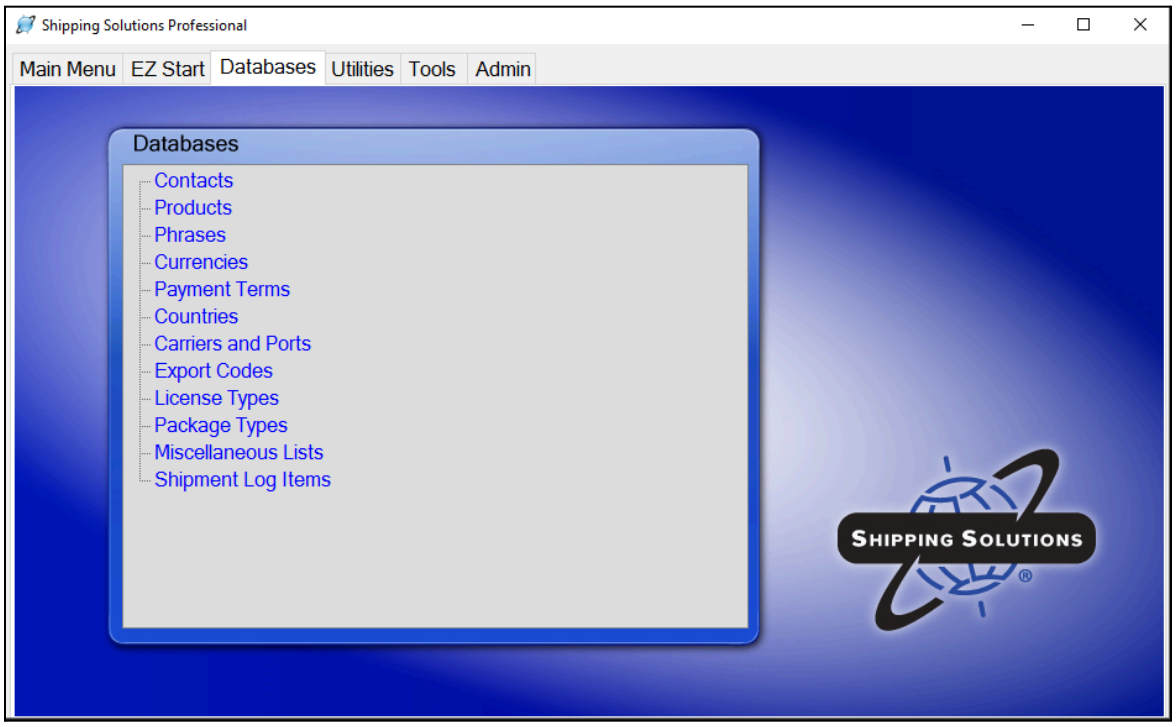


Follow the steps below to manually add items to the **Products Database**:

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 a third tab for dangerous goods information and a fourth tab for Free Trade Agreement 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 or 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. (See more information about the **Shipment Log** screen on the **EZ Start** tab here.) 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**.

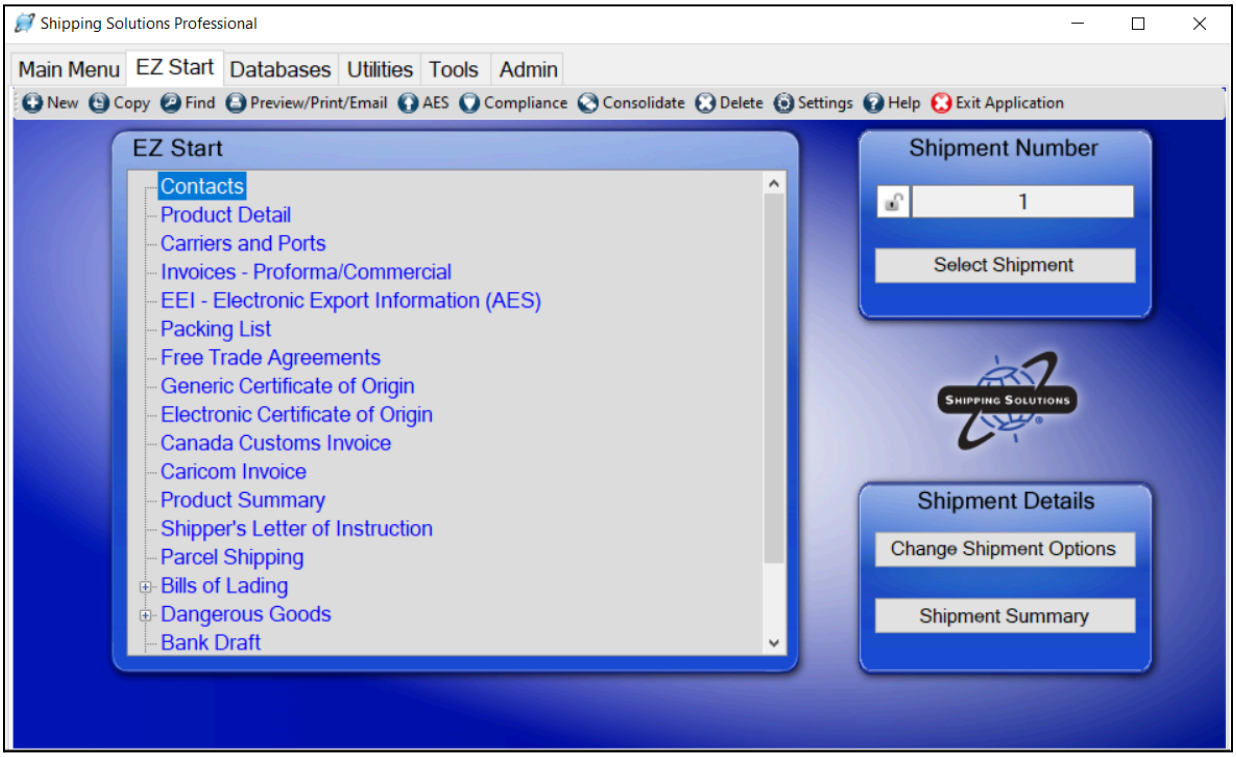
Creating a Shipment

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** beginning here.

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, free trade agreements 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.

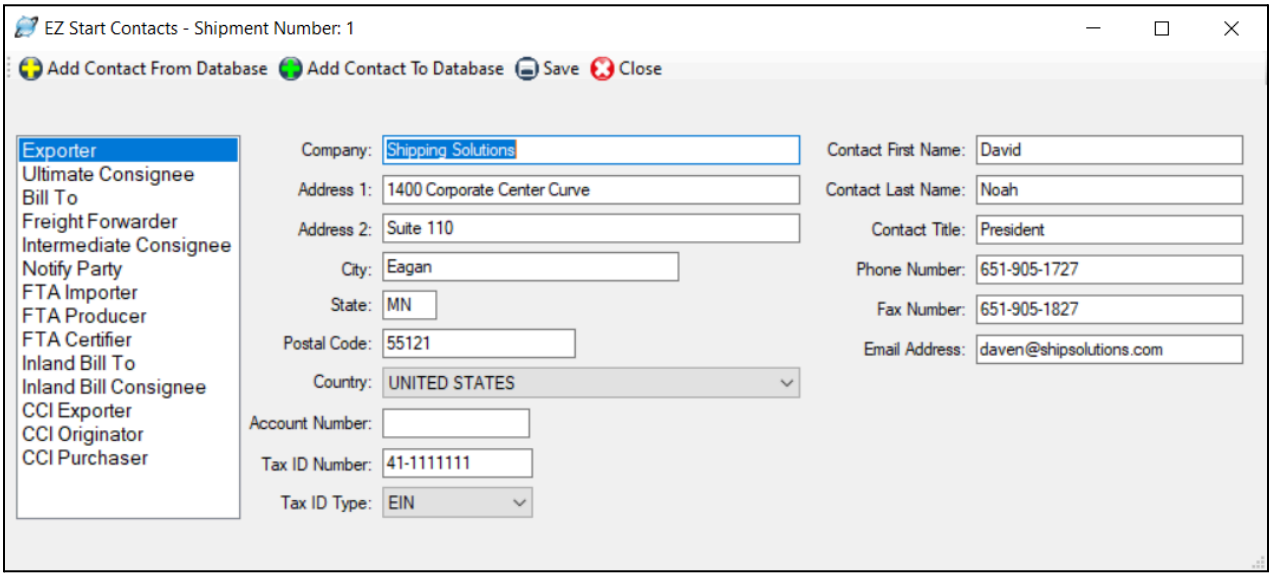
Please note: Shipping Solutions does not guarantee the accuracy of your export documents. You must review each form carefully to ensure that it has been completed fully and accurately.

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



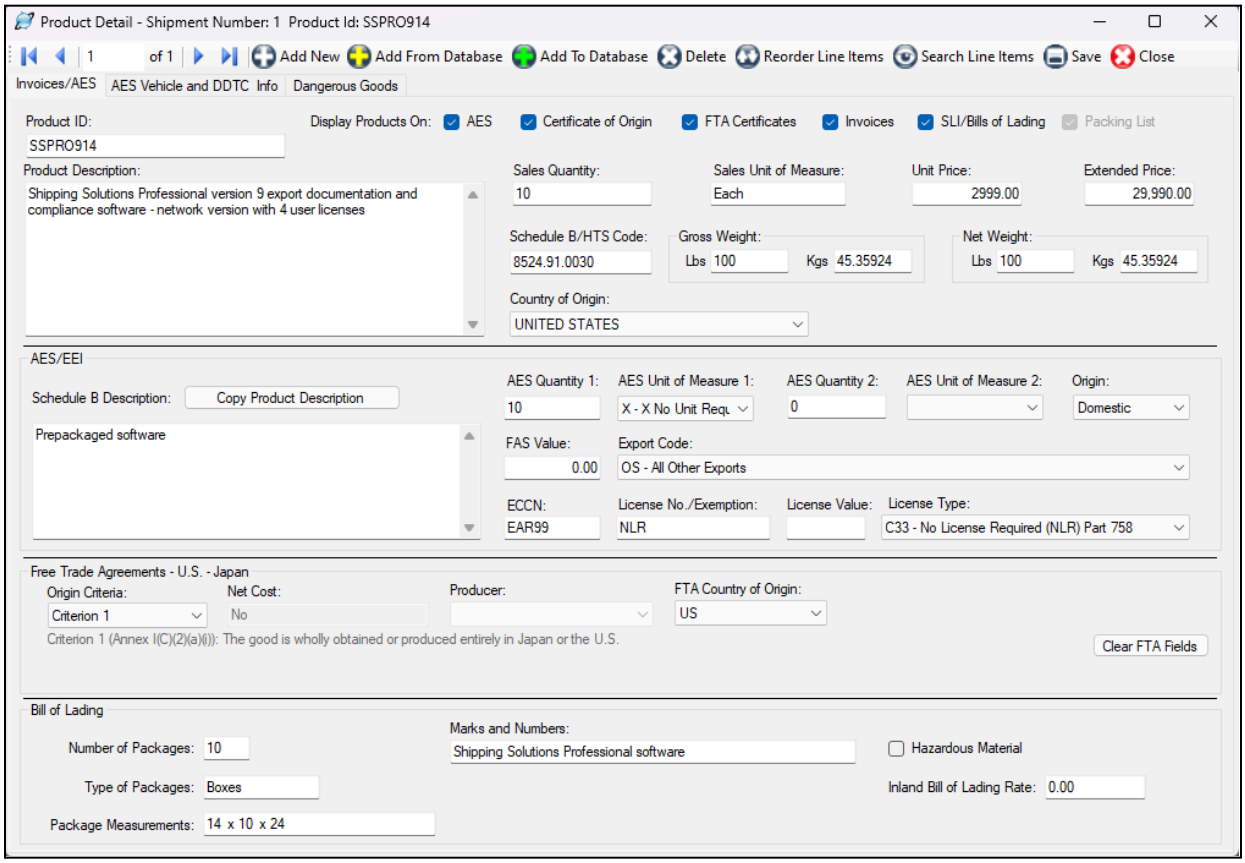
3. Click **Contacts**.

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.

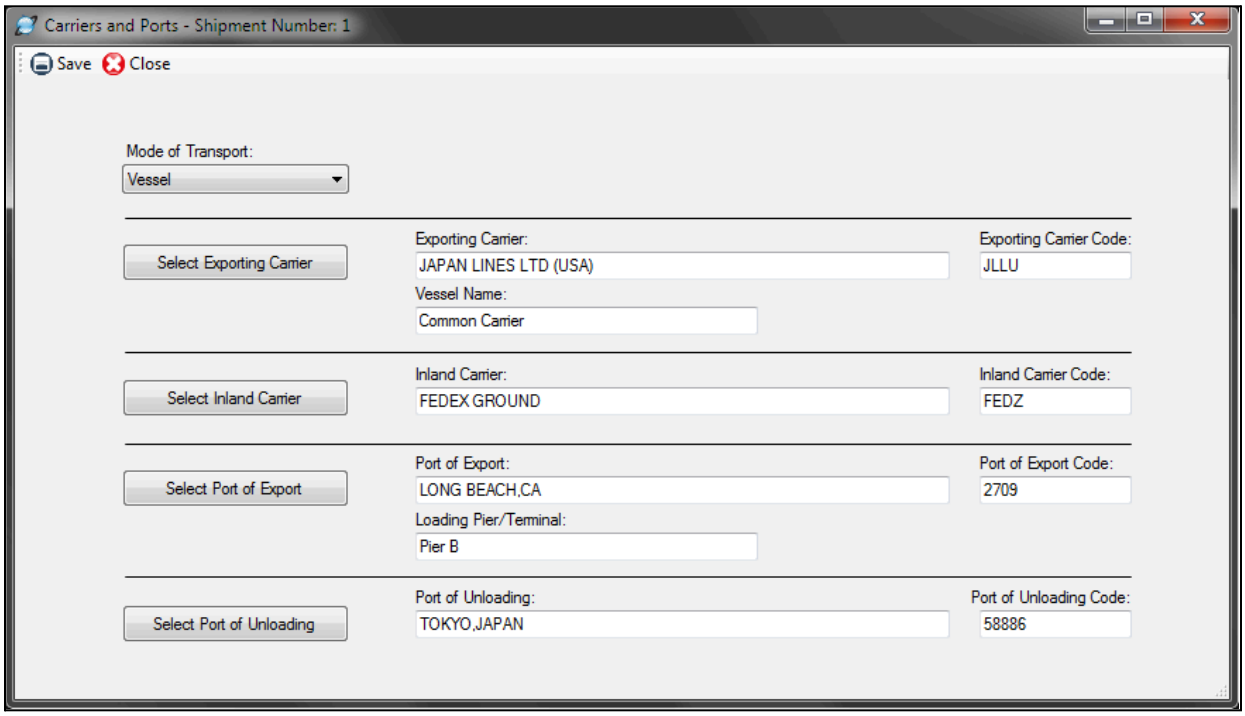
Please note: To select more than one product at a time from the Product Database, hold down the **Ctrl** button on your keyboard as you click on each item in the product grid.

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, dangerous goods information, and free trade agreement information. Fill in only what is necessary for your paperwork.

E. If you have entered the Free Trade Agreement (FTA) information in the Products Database, it will fill in based on the Ultimate Consignee Country you have filled in on your EZ Start Contacts screen. If you change the Ultimate Consignee Country after you have entered your products, you will have to manually adjust the FTA information. Click the **Clear FTA Fields** button to remove the old data.

F. Click the **Save** button and then the **Close** button.

The Carriers and Ports Screen in EZ Start



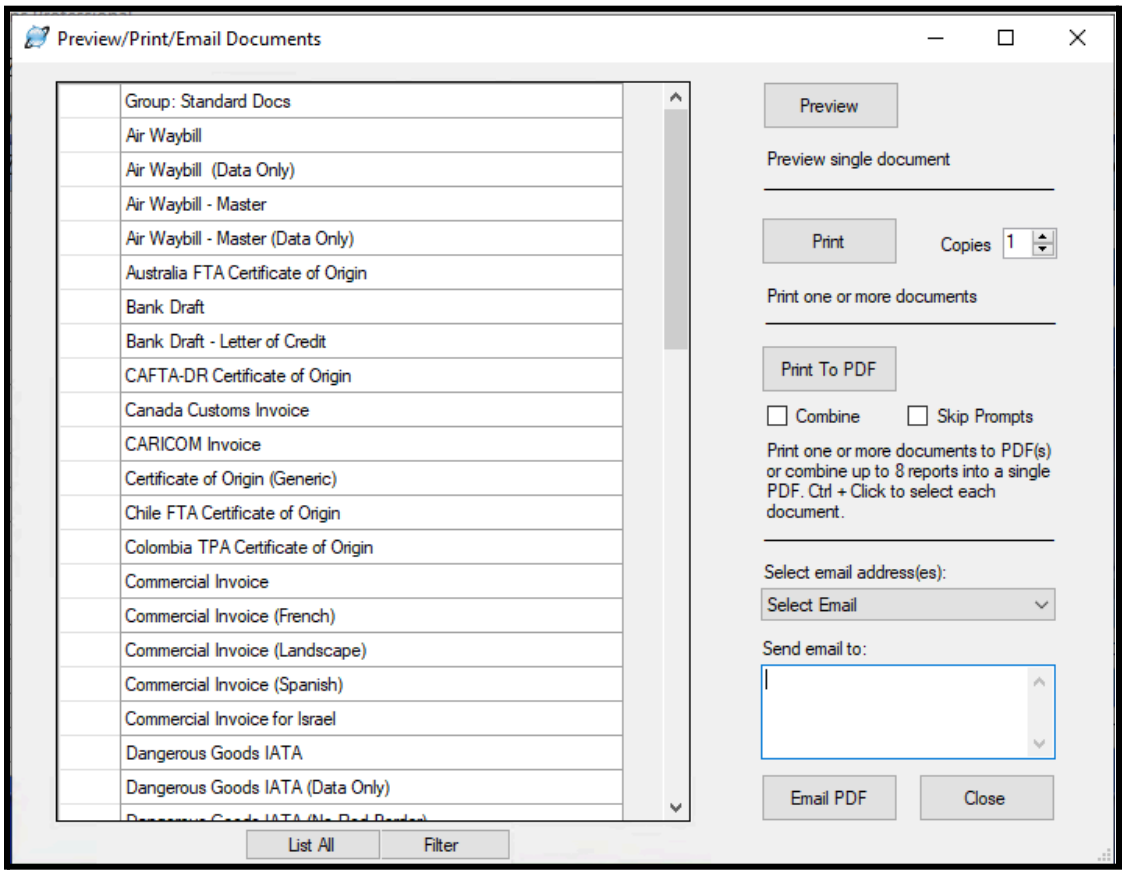
5. Click **Carriers and Ports**.

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. More detail on each screen is provided in the **EZ Start** section beginning here.

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** checkbox. 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 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.

Shipping Solutions Software in Detail

EZ Start Tab

Whether you are an experienced exporter or just getting started, Shipping Solutions makes filling out your export documents fast and easy. From the **Main Menu**, click on the **EZ Start** tab, enter the information about your shipment, and Shipping Solutions automatically completes the shipping documents.

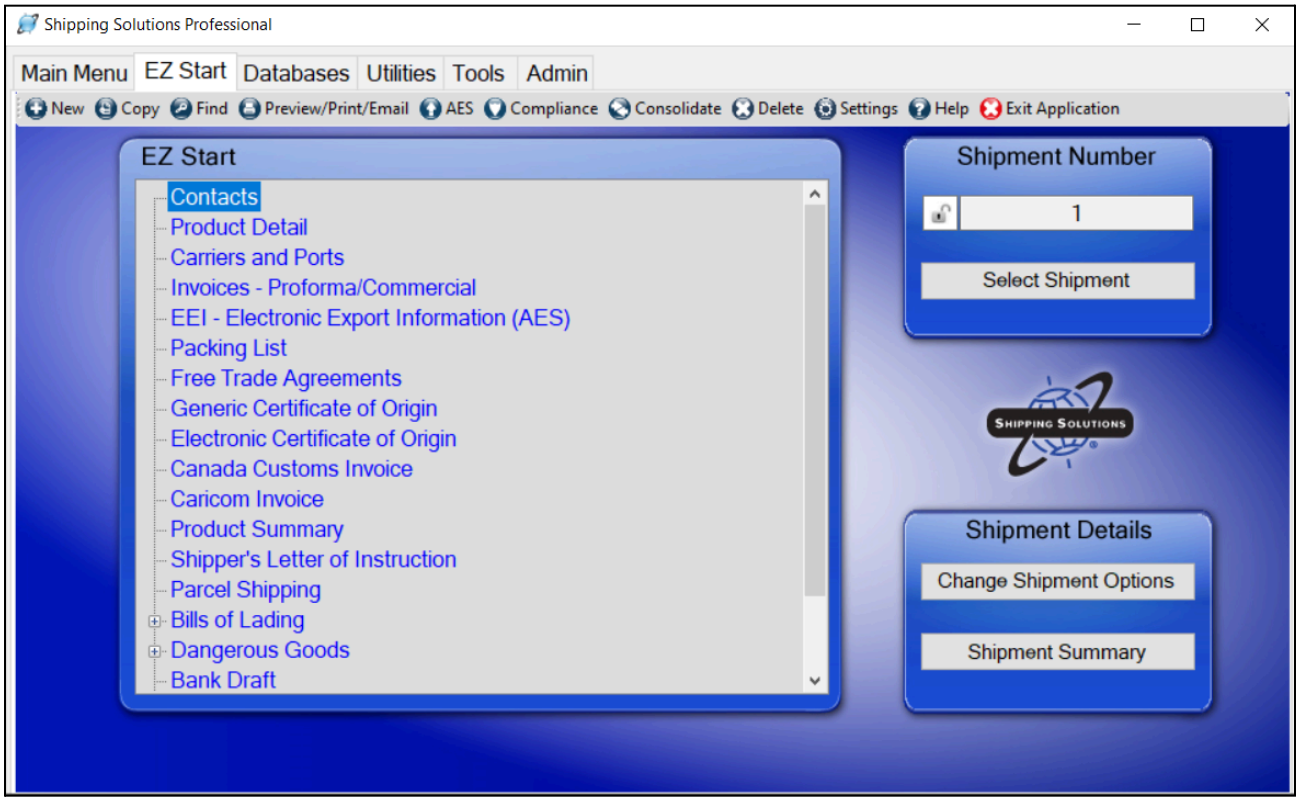
To make the program easy to use, **EZ Start** is divided into several different screens each focusing on either certain types of information (e.g. contacts and product detail) or on specific documents (e.g. commercial invoice, FTAs and packing list). By working your way down the list—skipping those screens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

Generally, Shipping Solutions recommends that all users complete 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.

The EZ Start Screen in Shipping Solutions Professional



The EZ Start Toolbar

Across the top of the **EZ Start** tab, are several toolbar buttons that automate various tasks within Shipping Solutions:

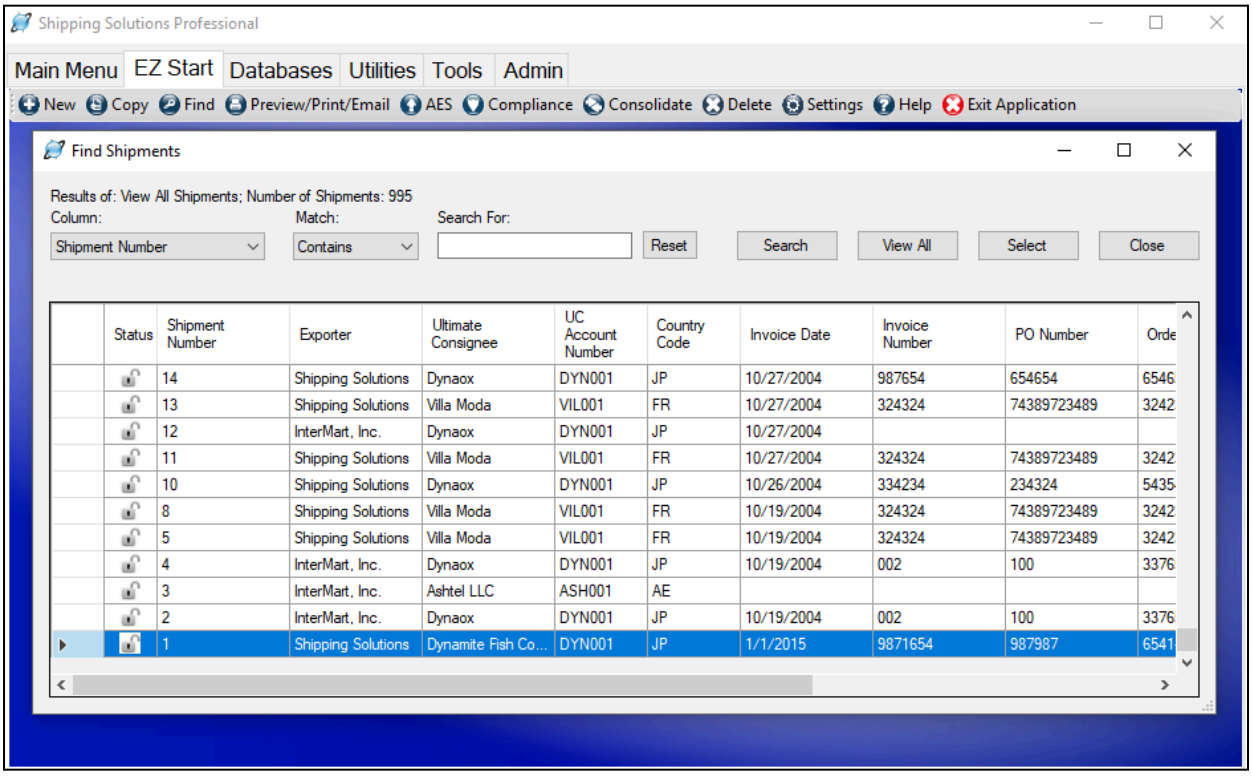
New

Click on this button to create a new shipment. Once you've clicked on this button a new **Shipment Number** will appear and all the **EZ Start** screens will be empty, so you can enter new data.

Copy

This button is one of the best time-saving features for companies that make similar shipments to the same consignees. To duplicate all the shipping information from a previous shipment, go to that previous shipment by selecting it using the **Find** button. (See description below.) Click on the **Copy** button and then click **Copy Shipment**. Uncheck the **Copy Product Detail** box if you only want to copy the shipment header information. It is not a good business practice to simply change a previous shipment rather than copying it because it is important to maintain an electronic copy of your previous shipping information.

The Find Previous Shipment Button in EZ Start



Find

This button allows you to search through all your previous shipments to find one specific shipment. When you first click **Find**, the screen will display your 20 most recent shipments. Click **View All** to see all your previous shipments from newest to oldest.

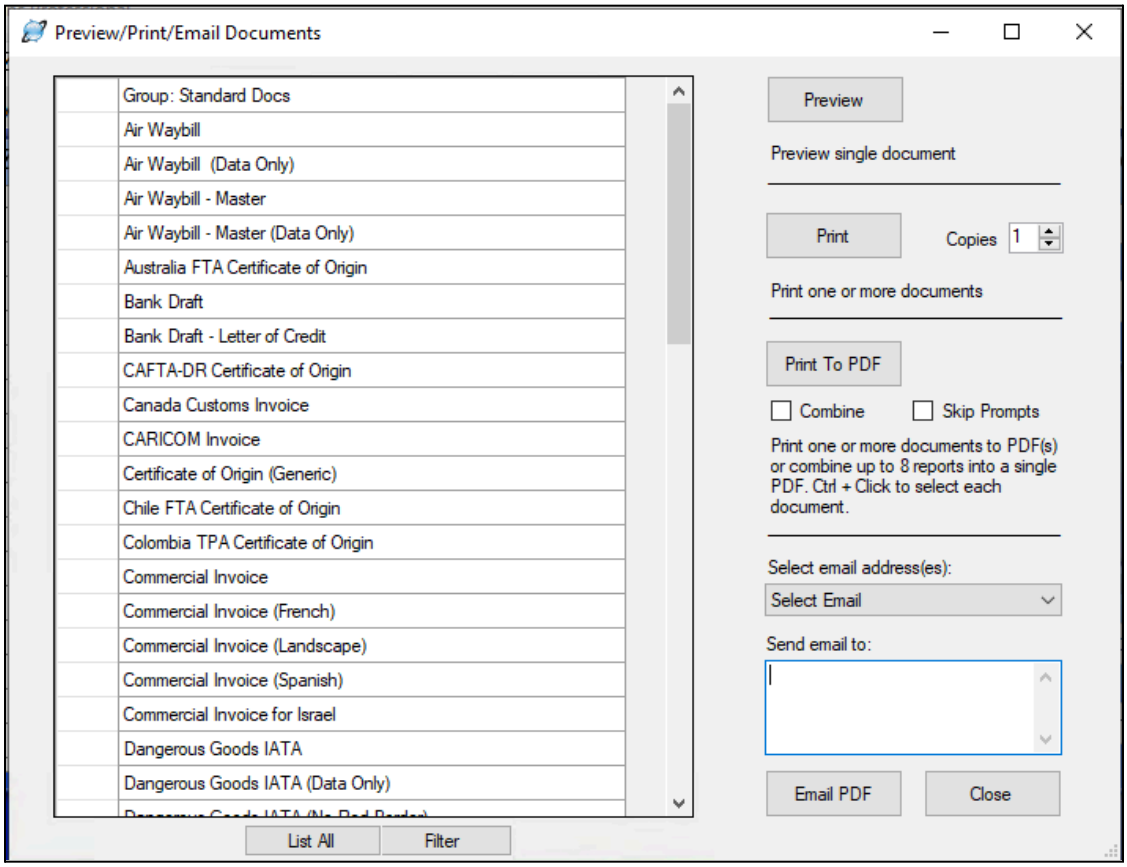
To narrow your search, select from the **Column** drop-down list the field you want to search, such as the **Invoice Number** or **Invoice Date**. Next, choose whether you want to find a shipment that contains, is equal to, or starts with what you are searching for. Third, enter what you are searching for. Finally, click on the **Search** button, and Shipping Solutions will display the results in the window. Click on the shipment you wish to open, and then click on the **Select** button. The **Shipment Number** you selected will now appear on the **EZ Start** screen.

Alternatively, you can click on any of the column headers in the grid to reorder your shipments in alphanumeric order. Click once to reorder the information in the column in ascending order; click a second time to reorder in descending order.

Your search results will remain in the **Find Shipments** window until you click **Reset** or close Shipping Solutions.

Shipping Solutions Professional and Enterprise users also have the option to display two additional columns in the Find table. The first one shows the results of their restricted party screenings they have run for each shipment and the second column displays whether a shipment is approved or not. The Global Settings screen on the Admin tab has a check box for turning on this feature. See detailed instructions here.

The Preview/Print/Email Menu Button in EZ Start



Preview/Print/Email

Click on this button to display all the documents available in Shipping Solutions. (You'll find a complete list of the documents available in Shipping Solutions and an explanation of their purpose in the Appendix found here.) You have the option to preview, print, print to PDF, or email the documents.

Preview

Select a document and then click **Preview** to see a preview of the document. The first time you preview a document after opening Shipping Solutions it will take a little longer to open than expected, but the subsequent documents will open quickly. The icons at the top of the **Preview Report** screen allow you to search, zoom or print the document right from the preview screen.

Print

Select a document and the number of copies you want to print. Click **Print**. The default printer will be filled in on the **Print** screen, but you have the option to change it to a different printer. To print multiple documents at one time, hold down the **Ctrl** key while selecting multiple documents. The documents will print to the default printer or to the printer specified on the **Tools-Customize Documents** screen. You cannot specify the printer for multiple reports on this screen.

Print to PDF

This option allows you to print documents to PDF in three different ways:

1. To print a single document to PDF, select the document and click **Print to PDF**. A **Save As** window will open allowing you to select the location where your PDF document will be saved. By default, the PDF file will be saved as [shipment number]_[document name], or 1_AirwayBill.pdf if you are trying to create a

PDF file of the air waybill on the first shipment. You do have the option of changing the name of the saved document in the **Save As** window.

2. To save multiple documents as individual PDF files, hold the **Ctrl** key down while selecting multiple documents and click **Print to PDF**. A **Save As** window will open allowing you to select the location where your PDF documents will be saved. Each document you selected will be saved as [shipment number]_[document name], but you can change the name in the **Save As** window as each document is created. If you click the **Skip Prompts** check box, you will only be asked for a location to save the last file selected in the document list, and you can only change the name of that file. The rest of the documents will be saved with their default names to the same location.

3. To print multiple documents to a single PDF file, hold the **Ctrl** key down while selecting documents and click the **Combine** checkbox. Click **Print to PDF**. The default name will be [shipment number]_Reports.pdf, but you have the option to change the name. By default, Shipping Solutions limits the number of documents you can combine in a single PDF document to five. This is done so the average user won't run out of computer memory. However, you can change the number of documents combined into a single PDF on the **Admin** tab, **Global Settings** screen if you wish and your computer allows.

Email

To email a document, click on a document, enter an email address in the **Send email to** box and click **Email PDF**. An email window will pop up where you can add a message before clicking **Send**. To send the same document to multiple email addresses, separate the addresses with semicolons. You can also choose email addresses from the drop-down box. All email addresses listed for this shipment's contacts will be in the drop-down list. To email multiple documents at one time, hold the **Ctrl** key down while selecting the documents.

Documents with Product Detail or Summary
Some of the documents are available in more than one format, such as in Spanish or French; as data only so that you can print on pre-printed forms; or with or without their colored borders. If a document name says "(with Product Detail)" it means that the product section of the document will be pulled from the **EZ Start Product Detail** screen. If a document name says "(with Product Summary)" it means that the product section of the document will be pulled from the **EZ Start Product Summary** screen.

Filtering

If you only ever use certain export forms, you can click the **Filter** button located at the bottom of the window. This will open a **Document Filter** window where you can uncheck any forms you never use, and then click the **Save** and **Close** buttons. You will now only see the forms you selected in the **Preview/Print/Email** window. Keep in mind that you can always click the **List All** button to override the filter and see a list of all the export forms available in the software.

Document Groups

Users can set up groups of documents to be used in specific situations such as exports to certain countries or customers or for specific types of products. These default documents are assigned to a print group so that users can just choose a group rather than having to remember to select each individual document to print.

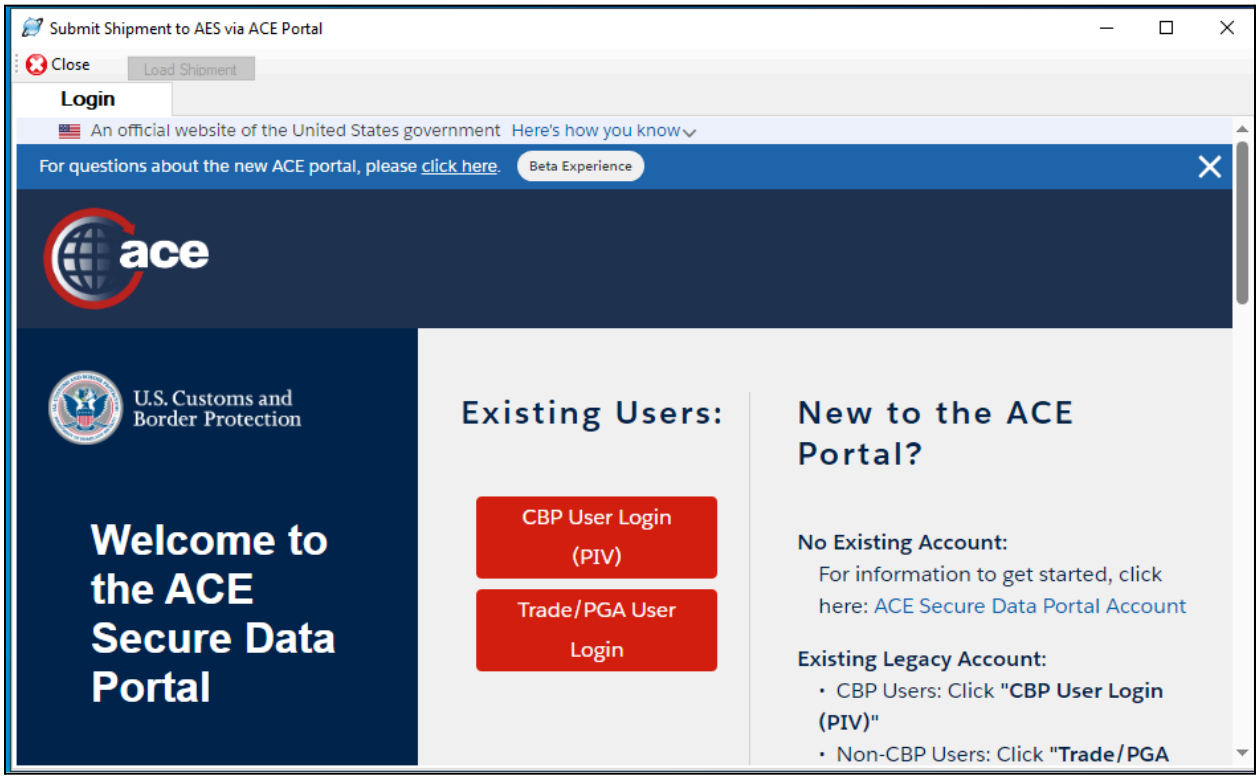
To create a document group from the Preview/Print/Email screen, select the documents you want to include by holding down the **Ctrl** key and selecting the documents. Then, right click on one of the documents and choose **Create Document Group**. Enter a name for the group and click **OK**. You will need to close and reopen the Preview/Print/Email screen to see your new document group.

A **Standard Docs** group has been created for you, but you can edit or delete it and any other document groups by going to the **Admin** tab, **Global Settings** screen and clicking the **Manage Document Groups** button.

Customizing Documents

Each document has certain features that can be customized. Right click on a document and select **Customize**. The customize screen will open. You can then make changes, save and close the screen. You can also access the Customize screen by going to the **Tools** tab, opening the **Customize Documents** tree and selecting the document you want to customize.

The AES Button in EZ Start



AES

The AES button allows you to transmit your Electronic Export Information (EEI) to the Automated Export System (AES). Generally, U.S. companies and individuals who export one or more items valued at $2,500 or more to countries other than Canada or include products that require an export license or export used vehicles are required by law to file.

Before you can file your EEI, you must get an Automated Commercial Environment (ACE) account. The ACE account application is on the U.S. Customs and Border Protection (CBP) website. If you already have an ACE account, make sure your account has the Export Account Type. To check this, talk to your company's Trade Account Owner and, if needed, get the Exporter role added to your account.

Instructions for Filing your EEI through Shipping Solutions

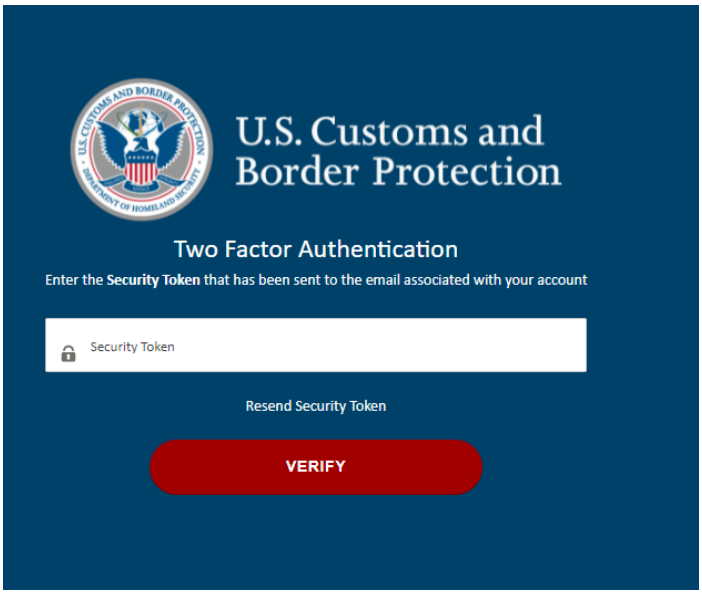
In Shipping Solutions, prepare your shipment as you normally do, and then click the **AES** button on the toolbar of the **EZ Start** screen. Click the red button that says **Trade/PGA User Login**.

The ACE Portal Login Screen



Login with your ACE login, which is your email address and password.

Two-Factor Authentication on the ACE Portal



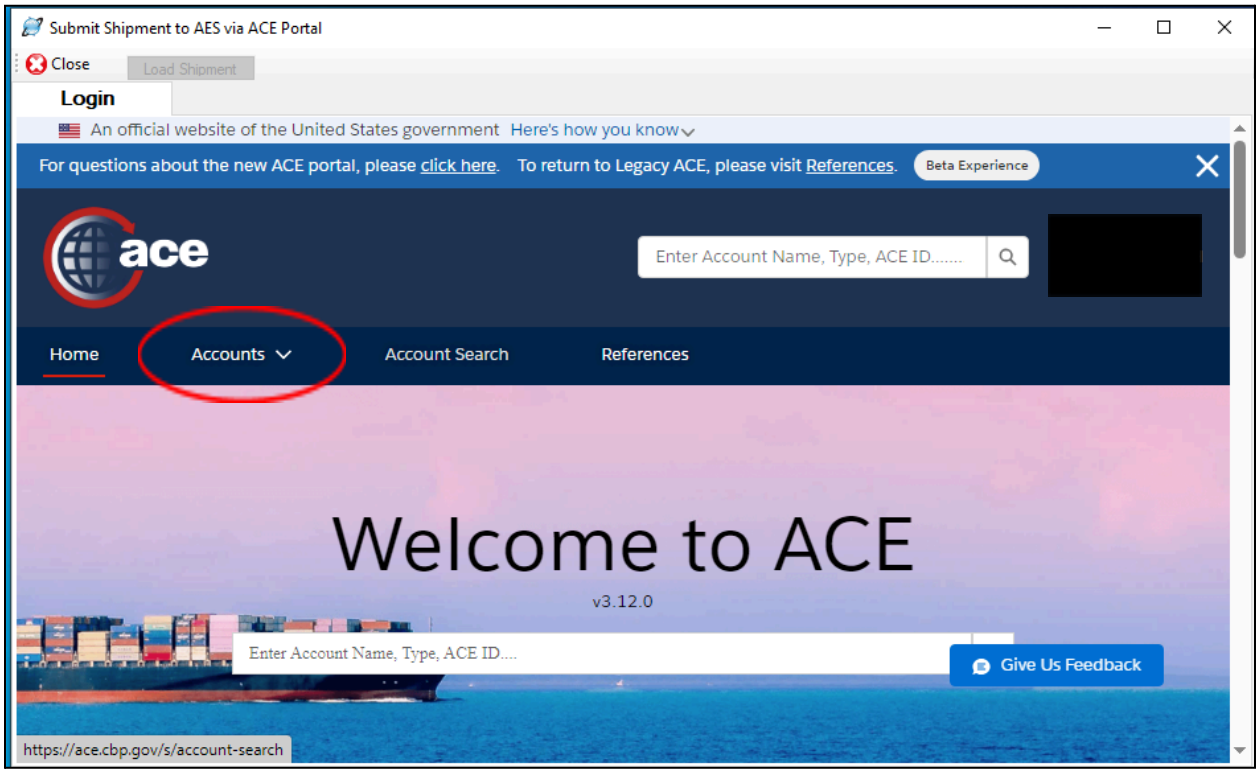
Receive the security token via your regular email and enter it on the screen.

ACE Portal Terms of Service



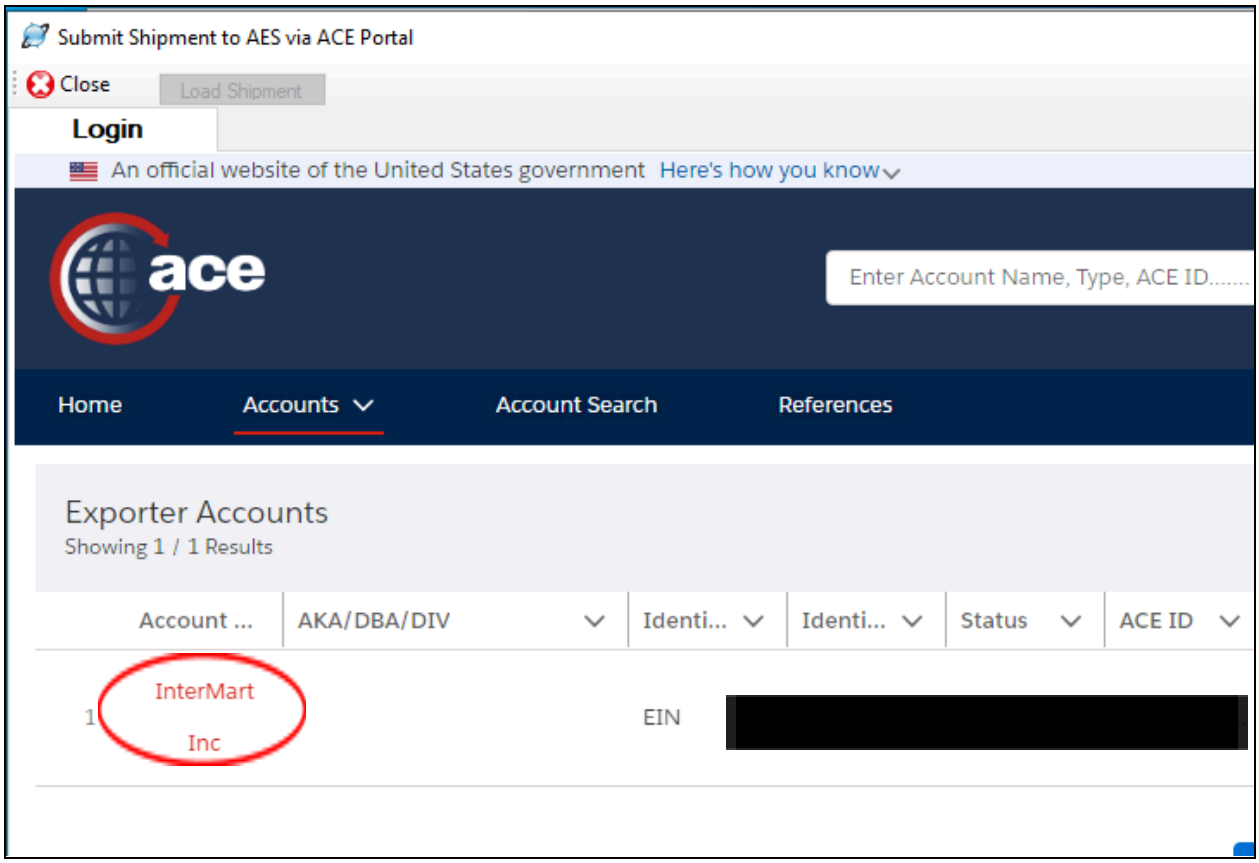
Accept CBP's terms.

The Modernized ACE Portal



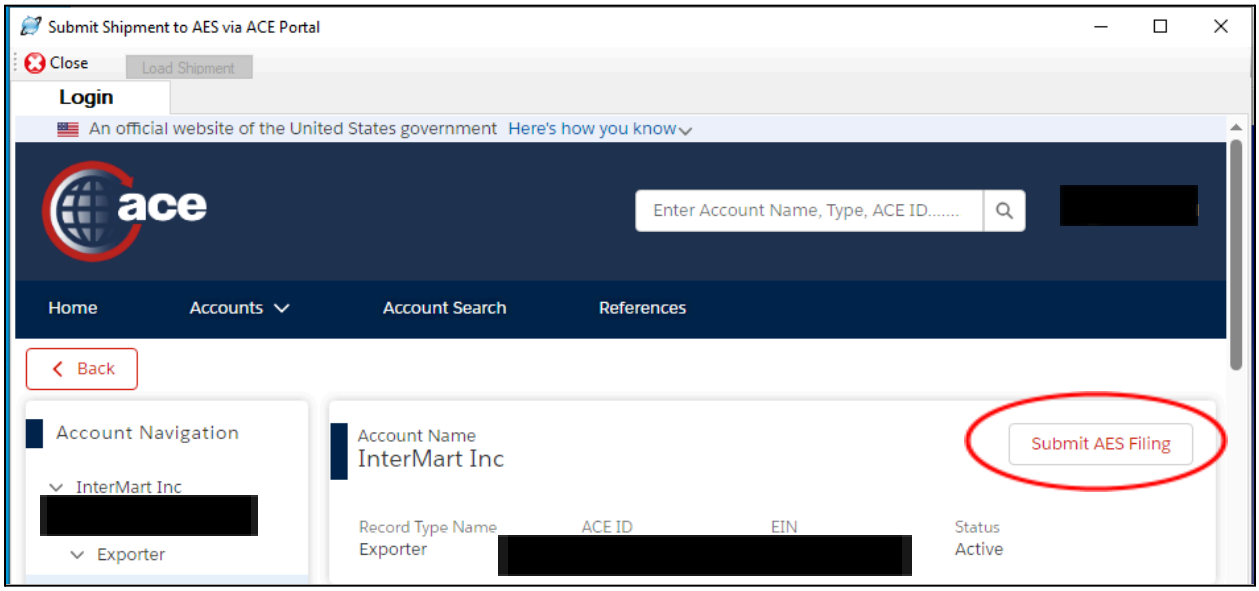
Choose **Exporter** in the Accounts drop-down list.

The Modernized ACE Portal



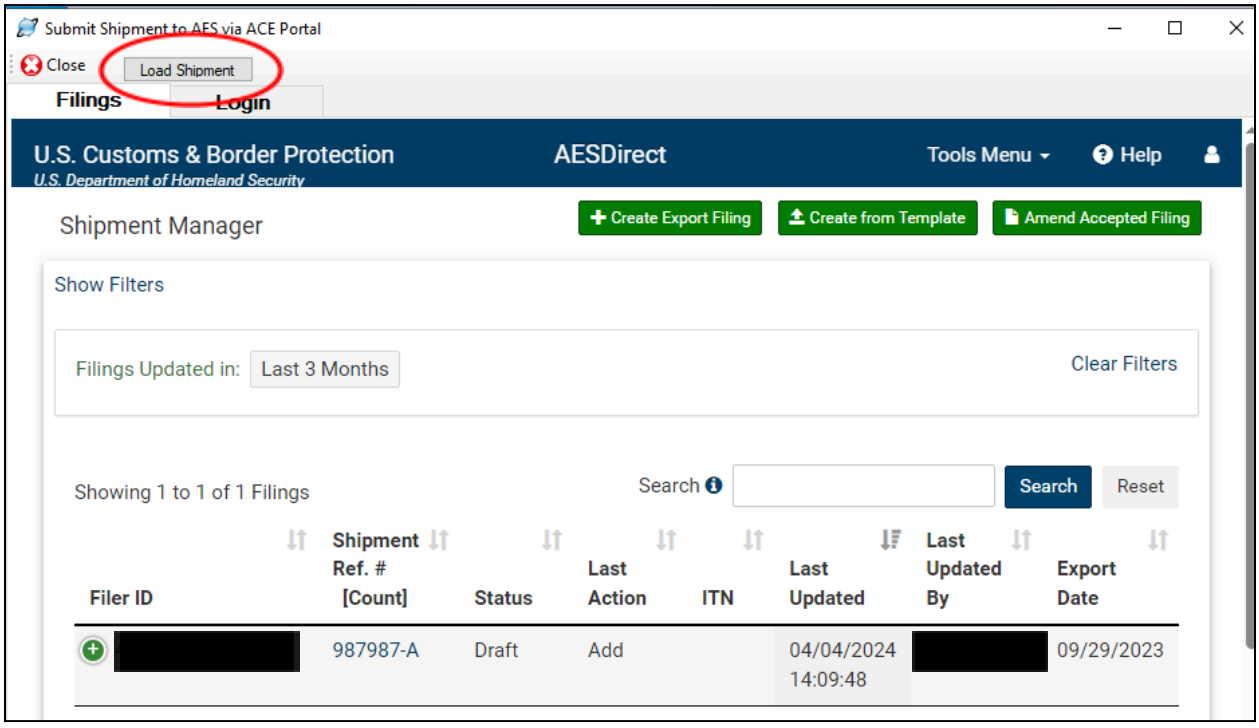
In the Exporter Accounts list choose your company name.

The Modernized ACE Portal



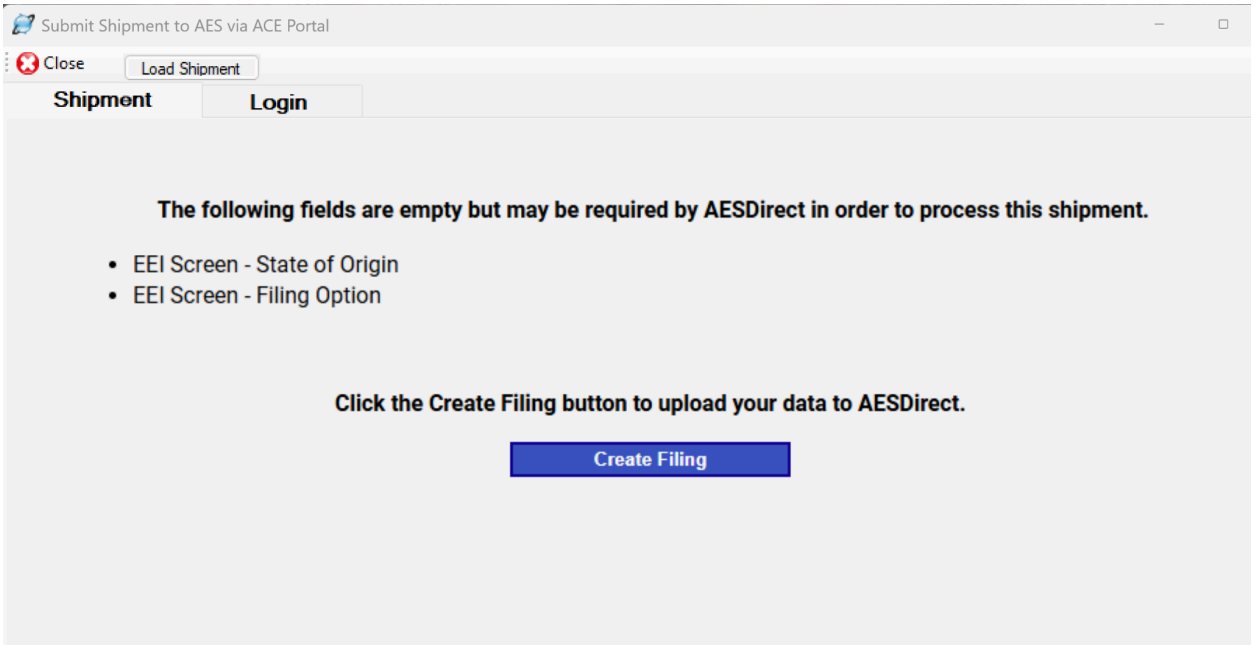
Click the **Submit AES Filings** button on the right side of the screen.

The Shipment Manager screen in the ACE Portal



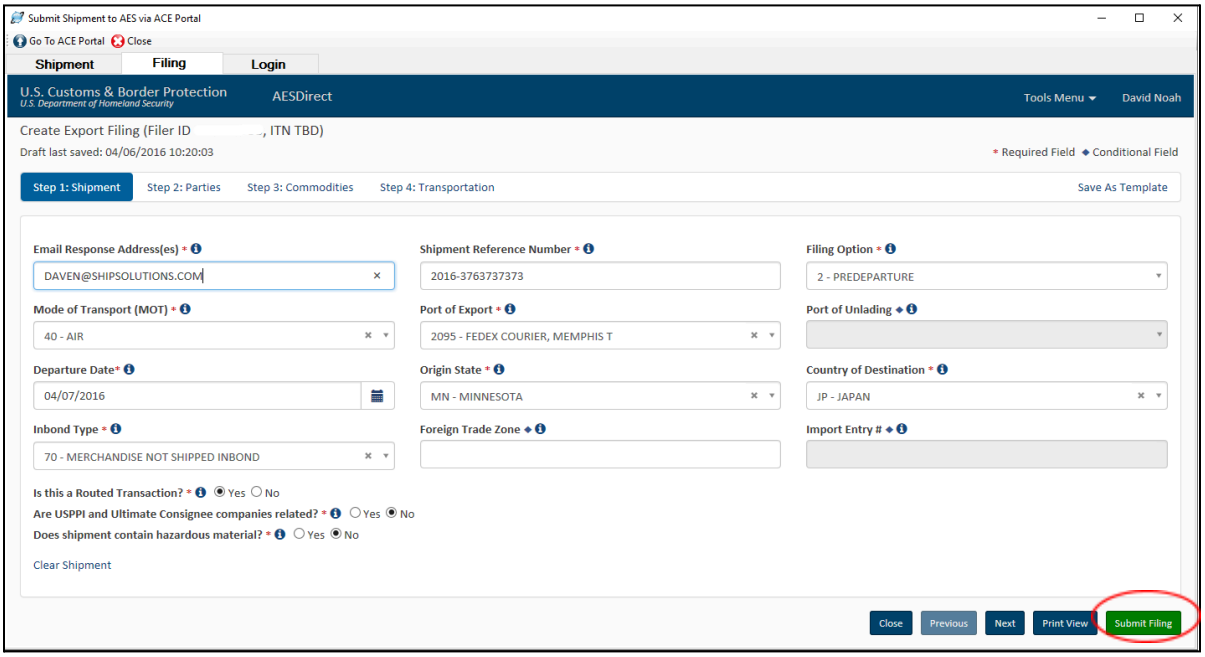
At the top of the screen click the Load Shipment button.

The Load Shipment Screen



Shipping Solutions will review the data for your shipment and notify you if any of the required data are missing along with the EZ Start screens where you can enter it into the software. You can close the AES screen to enter the missing items or enter them into the ACE portal after uploading your shipment. If you close the AES screen, you may need to login again. Click **Create Filing** to upload your shipment to the ACE Portal.

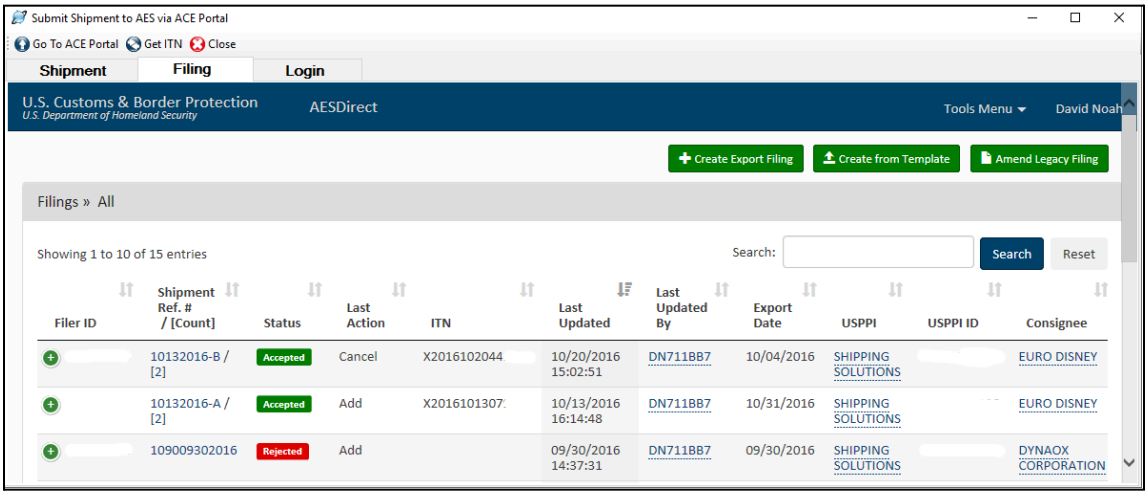
The 4-Step Export Filing Screen on the ACE Portal



Review the data on the **4-step Export Filing** screen. Then click the green **Submit Filing** button. If there is any data that does not meet AESDirect standards, you will get a **Filing Contains Errors** screen. Small red boxes will appear

next to each step in the filing identifying the errors. Read the messages in red identifying what is wrong with the data, fix the data, and click the **Submit Filing** button again. Continue fixing errors until your shipment is accepted.

The AESDirect Filing Summary Screen on the ACE Portal



Copy the ITN Number into the box labeled **AES ITN Code or Exemption Statement** on the **EZ Start-EEI-Electronic Export Information (AES)** screen so that it will appear in the appropriate spots on the appropriate forms. You will also need this number to access your record if you need to make any changes to it later. The ITN number will be sent to the email address used when registering with ACE. You can also enter a second email address on the **EZ Start-EEI** screen. If you want this email address to always receive the ITN emails, you can store it on the **Profile Settings** screen on the **Admin** tab.

The AESDirect Shipment Manager

If you click **Close** on the **4-Step Export Filing** screen you will find yourself on the **AESDirect Shipment Manager**. There you will see a list of your filings from newest to oldest. The Shipment Manager displays a green **Accepted** button if your filing was accepted and a red **Rejected** button if your filing was rejected. If your filing was accepted, you will also see the ITN number. You can copy and paste the ITN number from here to the Shipping Solutions **EZ Start-EEI** screen if you didn't do it earlier.

Any shipments that have not been accepted or rejected yet will be saved as **Drafts**. To continue working on the shipment, click **Edit** under **Shipment Actions**. If you can't see the **Shipment Actions**, click the plus sign next to the **Shipment Ref. #**. The **4-step Export Filing** screen will open and you can enter any missing data and click the **Submit Filing** button. You can also click directly on the **Shipment Ref. #** to open the **4-step Export Filing** screen. However, the green **Submit Filing** button is not available in this view.

If you are using Shipping Solutions to file your shipments, you will want to ignore the **Create Export Filing** and **Create from Template** buttons. However, you may want to use the **Amend AES Filing** button to locate a shipment that was already filed but needs to be amended. You can also find shipments that were filed via the old AESDirect Legacy system using the **Amend AES Filing** button.

AES Resources

For questions about your ACE account, call the ACE Account Service Desk at (866) 530-4172, option 1. General questions about EEI filings can be directed to the U.S. Census Bureau's Data Collection Branch at (800) 549-0595, option 1.

Shipping Solutions Professional's Export Compliance Module



Compliance

(Not available in Shipping Solutions Classic.) Shipping Solutions Professional and Enterprise allows Annual Maintenance Program (AMP) subscribers to ensure that their shipments comply with current export regulations. Before taking advantage of these screening and compliance features, you must request a username and password by emailing help@shippingsolutionssoftware.com.

You will receive an email back with your username and password. All Shipping Solutions users at your company can use the same username and password.

After you have registered for the service, select the shipment you want to screen, click the **Compliance** button and select one of the three screening options:

1. Document Determination

All international shipments must include the appropriate documentation to ensure customs clearance at the port of export and the port of entry. Shipping Solutions Professional determines which documents are needed for your shipment to help you ensure that you are complying with export and import regulations. Including appropriate documentation will help ensure your goods aren't delayed at customs, your customers aren't paying higher duty rates than necessary, and your company is paid fully and in a timely manner. For this feature to produce accurate results, make sure you have entered a country code for both the exporter and ultimate consignee on the **Contacts** screen, a **Product ID** for each product entered on the **Product Detail** screen, the **Date of Export** on the **EEI – Electronic Export Information** screen, and the **Mode of Transport** on the **Carriers and Ports** screen.

2. Export License Determination

The U.S. government restricts or bans the export of certain goods to specific countries or entities to protect natural resources, control the proliferation of arms and nuclear weapons, and to ensure national security and regional stability. Shipping Solutions Professional allows you to screen your products based on their Export Control Classification Number (ECCN) or U.S. Munitions List (USML) category and country of ultimate destination to help you determine if any licenses or license exceptions are needed to ship your goods. Screening your exports against the Export Administration Regulations (EAR) and International Traffic in Arms Regulations (ITAR) can protect

your company from fines, fees and even restrictions on exporting. For this feature to produce accurate results, you must enter a **Product ID** and an **ECCN** (or USML) code (if appropriate) for each of your products on the **Product Detail** screen, a country code for both the exporter and ultimate consignee on the **Contacts** screen, and the **Date of Export** on the **EEI – Electronic Export Information** screen.

3. Restricted Party Screening

Various government agencies maintain "bad guy" lists of people and organizations to which it is illegal to export for one or more reasons. Shipping Solutions Professional allows you to screen all the parties in your export transactions against these lists and notifies you of any potential matches. Screening your exports against these lists can protect your company from fines, fees and even restrictions on exporting. Shipping Solutions Professional will check all the names and addresses entered on the **Contacts** screen for the selected shipment by accessing a secure server and matching the appropriate fields in your current shipment against a consolidated list. In a matter of seconds, you will see a display of all potential matches including the name and address of the potential match, the *Federal Register* notice (if applicable) that added this contact to one of the restricted party lists, the effective date and (if applicable) the expiration date for this listing, and the list on which this match was found.

In Shipping Solutions Professional you can screen up to 10 companies or individuals that are parties to your export shipment. Shipping Solutions screens the Exporter, Ultimate Consignee, Bill To, Intermediate Consignee, and Freight Forwarder by default. You can also choose to screen the Exporting Carrier and up to four different contacts of your choice, such as Freight Forwarder, Notify Party, Bank, Manufacturer or End User.

To change which parties are screened, click the **Admin** tab, then the **Global Settings** screen, and then the **Compliance Settings** button. Use the check boxes and drop-down lists to indicate which parties to screen. You can also choose not to screen a contact. For example, if you don't want to screen yourself as the Exporter, you can uncheck that box. You should consult with your company's legal and/or compliance team to determine whether this is advisable. The results will indicate that the contact was not screened.

Like all features on the Global Settings screen, the Compliance Settings apply to all users connected to the same database.

After you have chosen your screening option, click **Run Compliance.** A box will pop up where you enter your user name and password. If you store your user name and password on the **Profile Settings** screen on the **Admin** tab, they will fill in automatically and the box will not pop up.

The first time you run a screening, a user agreement will pop up. Click the **Accept** button in the upper-left corner to accept the agreement and proceed. You only need to do this one time, and it will cover all compliance users at your company.

The results will appear on the screen. In the toolbar you will see the **Results** icon. A green triangle will display if the screening resulted in no potential matches. A yellow triangle will display if potential matches are returned. Next to the **Results** icon a gray circle and the status of **Open** will display for all results.

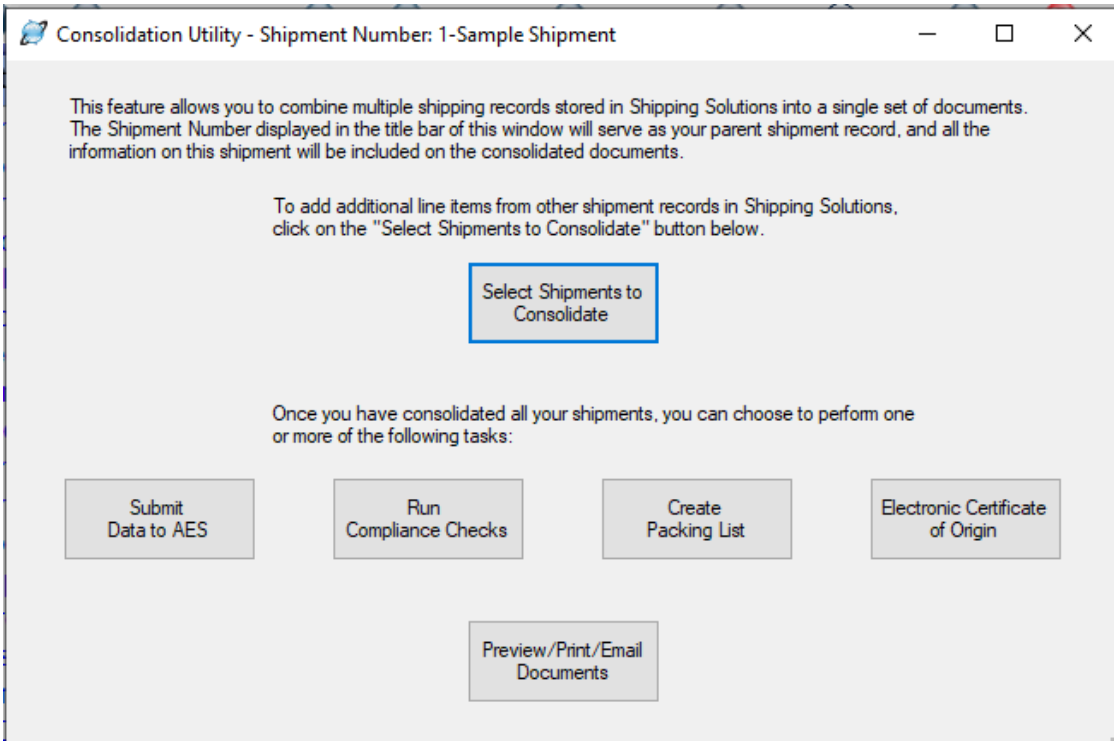
Use the drop-down list to change the status once the results have been reviewed. The options are Open, In Review, Approved or Denied. Your choice will be automatically saved. If you'd like to see the Results and Review columns when you click Find or Select Shipment, the Global Settings screen on the Admin tab has a check box for displaying those columns. See detailed instructions here.

Clicking **Audit Trail** will open a box showing all the screenings run for this shipment. The user account that ran the screening is displayed. You can view or print the results.

Some companies choose to run a pre-screening against the Restricted Party Screening lists when they first get an inquiry or order from a customer. Shipping Solutions' online Restricted Party Screening Wizard allows you to run Restricted Party Screenings from your web browser and outside of the Shipping Solutions software. These companies usually run a final Restricted Party Screening within Shipping Solutions before they ship their products to ensure that the lists, which could potentially be updated every day, haven't changed. Contact Shipping Solutions at (888) 890-7447 or help@shippingsolutionssoftware.com for more details about the online Restricted Party Screening Wizard.

The information for all three screening modules is monitored and updated within 24 hours of a change, so you always have access to timely information.

Shipping Solutions Professional's Consolidation Utility



Consolidate

(Not available in Shipping Solutions Classic.) This feature allows you to combine multiple shipping records stored in Shipping Solutions Professional into a single set of documents. To start the consolidation process, you must first select the shipment record that you want to act as the parent record and view it on EZ Start. Shipping Solutions Professional will use the contact, invoice, EEI and other information from this parent record for the new consolidated shipment. You can select a parent record by using the Find button described above.

Once you have selected the parent record, click the **Consolidate** button, which will open the **Consolidation Utility** window. To add additional product line items from other shipment records in Shipping Solutions Professional to the parent shipment, click **Select Shipments to Consolidate**, which will open a new window that will display the 10 most recent shipments created in Shipping Solutions Professional. Click **View All** to see all your shipments from newest to oldest (use the scroll bar to move through the list). To narrow your search, select from the **Field to Search** drop-down list the field you want to search, such as the **Invoice Number** or **Invoice Date**. Next, choose whether you want to find a shipment that contains or is equal to what you are searching for. Third, enter what you are searching for and click the **Search** button. Shipping Solutions Professional will display the results in the window.

Click on the shipments you want to consolidate. To choose multiple shipments hold down the **Ctrl** key while selecting the shipments. Click **Add**. The shipments will be moved to the lower grid. If you want to remove a shipment from the consolidation, click **Remove** or, to start over, click **Remove All.** Click **Close**.

Once you have consolidated your shipments, you can choose to perform one or more of the following tasks:

- **Preview/Print/Email Documents**—Click here to preview, print or email documents in the same way you would for a single shipment. See detailed instructions here.

- **Submit Data to AES**—Click here to file the consolidated shipment in the same way you would file a single shipment through AES*Direct*. See detailed instructions here.

- **Run Compliance Checks**—Click here to run a Restricted Party Screening, Document Determination or Export License Determination screening on the consolidated shipment in the same way you would a single shipment. See detailed instructions here

- **Create Packing List**—Click here to load your packages and create a packing list in the same way you would for a single shipment. See detailed instructions here.

Delete

This button deletes your current shipment from the program database. When you delete a shipment, the entire shipment record will disappear as well as the **Shipment Number**. You will not be able to use that **Shipment Number** again.

Settings

This button allows you to control several features on a user by user basis. Changes made here will only affect the user that is making the change.

The **Append Phrase** check box determines whether phrases selected from the Phrases Database replace each other or combine multiple phrases together. By default, the software appends one phrase to another, but you can change the setting to replace one phrase with another by unchecking the **Append Phrase** box. All fields that allow you to select a phrase from the Phrases Database are affected by this setting.

The **Product Search Match Default** determines what the default **Match** is on the **Databases** tab, **Products** screen. Choose between **Starts With** or **Contains**.

Help

This button takes you to the Shipping Solutions website where you can view the latest version of the User Guide, search through the Help Desk, or watch a video tutorial.

Exit Application

This button will close the Shipping Solutions software.

Shipment Number & Shipment Details

On the right side of the EZ Start Screen, are boxes showing specific information about your shipment:

Shipment Number



- The **Shipment Number** box shows the shipment number along with a lock/unlock icon. If the shipment is locked, the icon will be gold and appear closed, and you will not be able to add or change any information connected with this shipment record. If the shipment is unlocked the icon will be gray and appear open. To lock or unlock a shipment, go to the **Tools** tab and click **Lock/Unlock Shipments** (see here).

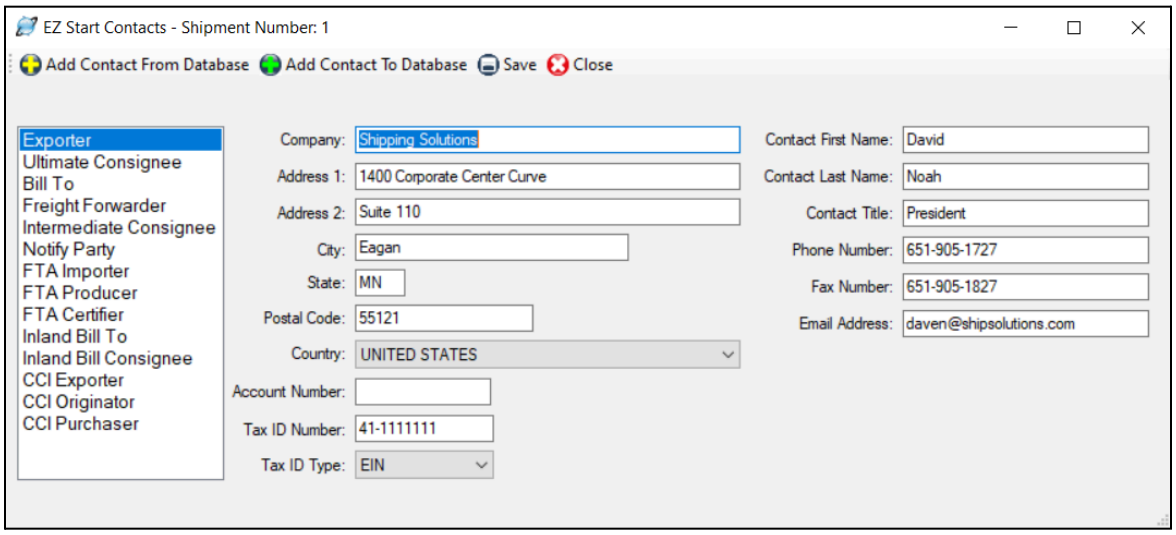
- The **Select Shipment** button allows you to search through your shipments and select one. It has the same functionality as the **Find** button, described above.

Shipment Details

- The **Change Shipment Options** button allows you to change the shipment number from the number automatically assigned by the software whenever you create a new shipment to any number you would like. You can also include letters in your shipment number. Use the **Search Tag** field to enter a word or number that will help you find this shipment when using the **Find** or **Select Shipment** buttons. You can also change the **Profile** for this shipment. (For more information on profiles, see here.) Click **Update Shipment** to save your changes or **Cancel** to delete the changes.

- Clicking on the **Shipment Summary** button will display the details about this shipment without having to move through the various EZ Start screens. The summary information includes: Shipment Number, Exporter, Ultimate Consignee, Invoice Number, Invoice Date, Order Number, Status (locked or unlocked), Profile, AES ITN/Exemption Statement, UPS Tracking Number, FedEx Tracking Number, and Shipment Creator. The Shipment Creator is the User Account of whoever was logged into Shipping Solutions when the shipment was created.

The Contacts Screen in EZ Start



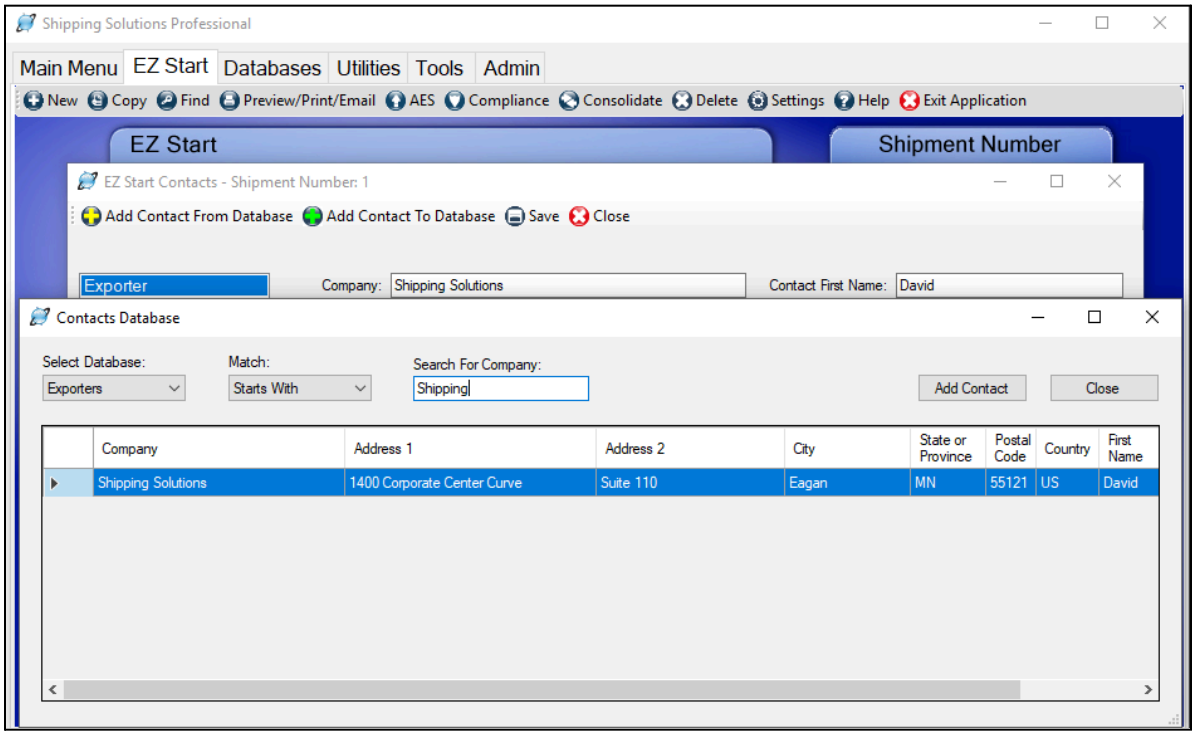
Contacts Screen

Once you have clicked on the **New** or **Copy** button to create a shipment, you can proceed to the list of **EZ Start** screens. The first screen is the **Contacts** screen, which is where you enter the names and addresses of all the parties involved in your export shipment. You can enter the names and addresses of the parties into the various fields on this screen, or you can select the contacts from the various Shipping Solutions databases you have previously populated with your company and customer information (see here for more details).

The most commonly used types of contacts are always listed in the box on the left side of the screen. Other contacts may be added from other EZ Start screens. For example, the consignee that appears on the Inland Bill of Lading form is entered on the **Bills of Lading—Inland Bill of Lading** screen. However, you can also choose to add other contacts from this screen by placing your cursor in the left-hand box of contacts and clicking on the right mouse button. This will open a menu where you can click **Add Contact** and then choose the type of contact you wish to add. You can also choose **Delete Contact** to delete any of these additional contacts (but none of the first six contact types listed in the box).

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** (preferred method). The **Contacts Database** will open where 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 the company you are looking for in the **Search For** box. You can also search by account number, tax ID number, city, state or zip. Exporters that match your search criteria will appear in the grid.

Adding Contacts to a Shipment from the Contacts Database



You can also sort the contacts by clicking on the column header in the grid. Clicking on the column header once will sort all the contacts in ascending alpha/numeric order; clicking the column header a second time will sort the contacts in descending order. You can sort the contact records by clicking on any of the column headers. For example, clicking on the **Postal Code** column header will arrange all your contacts from the smallest number value to the highest number value. Use the scroll bar on the right side of the grid if you have more records than are visible in the grid.

Once you have found the correct exporter in the grid, simply double-click on the exporter in the grid or highlight the correct exporter and then click **Add Contact**. You will be taken back to the **EZ Start Contacts** screen where your exporter information has been filled in.

Click **Ultimate Consignee** in the box on the left side of the screen and add your **Ultimate Consignee** the same way you entered your **Exporter**. Continue down the list for any contact that you want to fill in.

If you manually enter a new contact on this screen or make a change to an existing contact that you want saved in the Contacts database, click **Add Contact to Database**. If the contact doesn't currently exist in the database, the software will ask you if you are sure you want to add it to the database. Click **Yes**.

If the contact already exists in the Contacts database, a grid will pop up with any matching contacts based on company name. To add the contact again, click **Add New Contact**. To update an existing contact, choose the contact to update in the grid, and click **Update Selected Contact**.

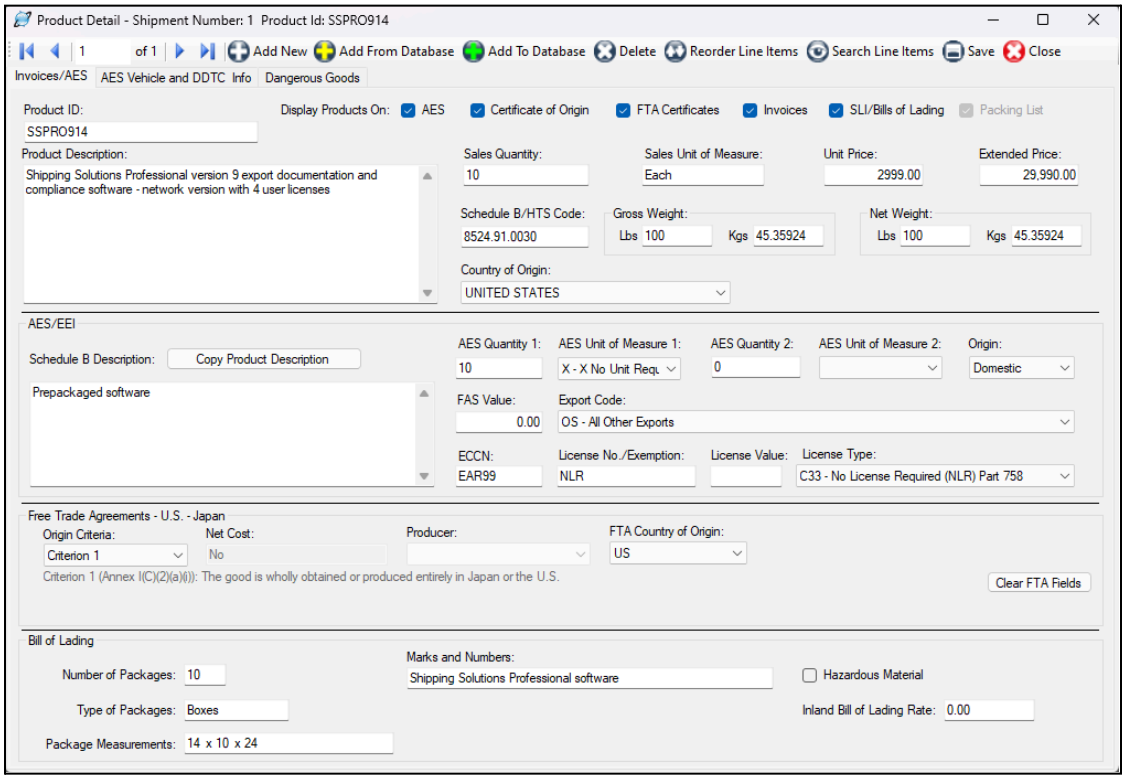
Once you are done adding contacts to your shipment, click the **Save** button and then the **Close** button.

Ultimate Consignee Additional Information

AES requires one additional piece of data for the Ultimate Consignee, which is not required for any other contact: Ultimate Consignee Type. This mandatory AES field requires that you select from the drop-down menu of choices: **Direct Consumer**, **Government Entity**, **Other/Unknown**, or **Reseller**.

Shipments to Europe will require an EORI number, and shipments to China will require an USCI number. The **Tax ID Number** field on the Ultimate Consignee screen is big enough to accommodate those numbers.

The Product Detail Screen in EZ Start



Product Detail Screen

This screen allows you to enter your product information for each line item you are shipping. You can either enter your information on this screen, or you can select products from the **Product Database**.

Add New or Add From Database

Click on one of these two buttons to add the first product to your shipment.

Use the **Add New** button if you want to type your product information directly on the **EZ Start** screen. After you've entered your first product, click this button again to enter a second product. Repeat this process until all your items have been entered.

If you have already entered your products into the Product Database, click on the **Add From Database** button. Clicking this button will open the **Products** database where you can select a product from the grid or search for a product. To search for a product to add to this shipment record, choose **ProductID** or **Description** in the **Column** drop-down box and either **Starts 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. You can change the default for the **Match** drop-down box by going to the **EZ Start** tab, **Settings** button.

You can also sort the products by clicking on the column header in the grid. Clicking on the column header once will sort all the products in ascending alphanumeric order; clicking the column header a second time will sort the products in descending order. You can sort all the product records by clicking on any of the column headers. For example, clicking on the **Schedule B/HTS Code** column header will arrange all your products from the smallest number value to the highest number value. Use the scroll bar on the right side of the grid if you have more records than are visible in the grid.

Once you have found the correct product in the grid, simply double-click on the product in the grid or highlight the correct product and then 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 blue arrow keys. Click **Add From Database** as many times as needed to add all the products in your shipment. To select more than one product at a time from the **Products** database, hold down the **Ctrl** button on your keyboard as you click on each item in the product grid.

Add To Database

Click this button if you have manually entered a product or modified an existing product on the EZ Start screen and now want to save that new or modified product to the Product Database. First, it will ask if you want to save your changes, and you will need to click **Yes** to proceed with adding the product to the database. If the product doesn't exist yet in the Product Database, the software will ask you if you are sure you want to add it to the database. Click **Yes**. If the product already exists in the Product Database, a grid will pop up with any matching products based on the Product ID. To add the product as is, click **Add New Product**. To update an existing product, choose the product to update in the grid and click **Update Selected Product**.

Delete

Click this button to delete the currently displayed line item for your shipment.

Reorder Line Items

By default, Shipping Solutions will print the line items in your shipment in the same order in which they were entered into the **Product Detail** screen with some exceptions for items that get combined together. This button allows you to rearrange the order in which the line items will print on your invoices by clicking the item and entering a new line number for the item. This feature will not rearrange the items on the non-invoice forms.

Search Line Items

Click this button to display all the product line items you've entered for this shipment in a grid box. Select one of the lines to display all its information on the screen. While the blue arrow keys will also allow you to move through the line items in your shipment, this button will make it easier if you have many line items.

Save

You must click **Save** for the data you have entered to be saved. If you enter data into a field but do not move off that field before saving, the data will not be saved.

Close

Click **Close** to exit the **Product Detail** screen. You must click **Save** before closing to save the data.

Display Products On

Because you may not want all the product line items for this shipment to appear on all the documents, Shipping Solutions provides check boxes for some of the documents. Check the box if you want this product to appear on the following document and uncheck the box if you don't: **Certificate of Origin**, **FTA Certificates**, **Invoices**, **SLI/Bills of Lading**, and **Packing List**.

If the **Packing List** check box is grayed out, it means this item has already been packed. Go to the Packing List screen and unpack the item (see here). You will then be able to uncheck this box. The **AES** check box determines if

this product is included in the electronic filing to AES*Direct*. By default, all the boxes are checked whenever you add a new line item.

If the **FTA Certificates** button is grayed out, it means that the **FTA-Automatically include items with Criterion** box is checked on the **Admin-Global Settings** screen. This button overrides the box on the Product Detail screen and displays the line item if data is entered in the Free Trade Agreements section. Uncheck the box if you want to control whether items are displayed on the FTA documents using the Product Detail screen.

Product ID
Enter your company's product number for this product.

Product Description
Enter your company's description of the product. You have the option to append the Country of Origin and/or the ECCN classification to the Product Description entered here. By default, the Country of Origin will appear; the ECCN won't. Go to the **Tools** tab, **Customize Documents** screen to change these settings.

Sales Quantity
Enter the number of pieces or units of the product you are shipping with this order.

Sales Unit of Measure
Enter the unit of measure for this product as it is calculated for invoicing purposes. This unit of measure will appear on the commercial and proforma invoices.

Unit Price
Enter the per piece or per unit price of the product. Shipping Solutions allows you to enter a unit value with up to five decimal places.

Extended Price
This is the total value for the line item, usually Quantity * Unit Price. Shipping Solutions will automatically calculate this value for you, although you can overwrite the calculated value with another value if you need to.

Schedule B/HTS Code
Enter the Schedule B Commodity Classification Code or Harmonized Tariff System (HTS) Code for the product. The first six digits of the code will appear on any document used internationally; all 10 digits appear on domestic documents and on your AES filing. Shipping Solutions allows you to adjust the number of digits that appear on many of the forms by going to the **Tools** tab and clicking on **Customize Documents**. That screen also gives you the option not to display the Schedule B number on the invoices if you prefer.

Gross Weight
Enter the total weight for this line item including packaging. Enter this weight in pounds or kilograms, and the program will automatically convert it and fill in the other box.

Net Weight
Enter the weight of the product without any immediate wrappings; e.g., the weight of the contents of a tin can without the weight of the can. You can enter this weight in pounds or in kilograms, and Shipping Solutions will automatically convert it and fill in the other box.

Country of Origin
Shipping Solutions gives you the option of listing a product's country of origin on your invoices appended to the end of your **Product Description**. If you wish to take advantage of this option, enter the country of origin for this product in this field. (You can turn this option on by going to the **Tools** tab and clicking on the **Customize Documents** screen. Click on the **Commercial Invoice**, **Proforma Invoice**, **Canada Customs Invoice**, or **CAFTA-DR** form, and then make sure the **Add Country of Origin to Product Description** box is checked.)

AES/EEI Section

The following fields are required when filing your Electronic Export Information (EEI) electronically through the Automated Export System (AES) or if you are creating a Shipper's Letter of Instruction in either the NCBFAA format or the SED format so a third party (typically a freight forwarder) can file on your behalf.

Schedule B Description

Certain products may require that you use a different description on the EEI/AES filing than on your invoices. This field gives you the opportunity to enter a second product description that will appear only on the Shipper's Letter of Instruction (in SED or NCBFAA format) and be transmitted to AES. If you wish to use the same description for AES as you do on the invoices, simply click on the **Copy Product Description** button, and Shipping Solutions will copy the first description into this field.

AES Quantity 1

Shipping Solutions will automatically copy the quantity that you entered into the **Sales Quantity** field above into the **AES Quantity 1** field. However, the correct unit of measure for the Shipper's Letter of Instruction (in SED or NCBFAA format) and AES is determined by the Schedule B or Harmonized Tariff System code for your product. It may very well be different from the unit of measure that you use on your invoices. Shipping Solutions allows you to overwrite the quantity that it automatically copied into this field with a different quantity, if necessary to match a different unit of measure.

AES Unit of Measure 1

The correct unit of measure for the Shipper's Letter of Instruction (in SED or NCBFAA format) and AES is determined by the Schedule B or Harmonized Tariff System code for your product. It may very well be different from the unit of measure that you use on your invoices. Click on the drop-down menu to select one of the units of measure that is allowed by the U.S. Census Bureau to appear on the Shipper's Letter of Instruction (in SED or NCBFAA format) and transmitted to AES.

AES Quantity 2

The U.S. Census Bureau requires exporters of certain, limited products to report two quantities and two units of measure when filing their EEI electronically through AES. This depends on the Schedule B or HTS code of the product. If this product requires two units of measure, enter your second quantity here. Otherwise, leave this field blank.

AES Unit of Measure 2

The U.S. Census Bureau requires exporters of certain, limited products to report two quantities and two units of measure when filing their EEI electronically through AES. This depends on the Schedule B or HTS code of the product. If this product requires two units of measure, select the second unit of measure from the drop-down list. Otherwise, leave this field blank.

Origin

Indicate the type of export:

- **Domestic**—merchandise that is grown, produced or manufactured in the United States (including imported merchandise that has been enhanced in value or changed from the form in which it was imported by further manufacturing or processing in the United States).
- **Foreign**—merchandise that has entered the United States and is being re-exported in the same condition as when imported.

FAS Value

U.S. export regulations require that the value of the products that you report on the Shipper's Letter of Instruction (in SED or NCBFAA format) or transmit to AES include not just their Ex Works value (the value of the goods sitting in your warehouse), but also all additional expenses that are incurred to transport your product to the port of export (such as freight and insurance). Use this field to enter those additional costs for each line item. These additional expenses will be added to the line item totals for AES purposes but not the totals on any of the invoices.

Export Code
An export code is required when filing your EEI electronically through AES. Select the proper code from the drop-down list. If you are not using AES, you can leave this field blank. The most common code is "OS – All Other Exports." You'll find a complete description of all the export codes in the Appendix (see here).

ECCN
Enter the Export Control Classification Number (ECCN), if necessary, for your product. Please Note: EAR99 is not an ECCN number. Entering that code in this field may cause problems if you try to file this shipment through AES*Direct*. If your product is EAR99, you can leave this field blank. To have the ECCN append to the Product Description on the Proforma and Commercial invoices, go to the **Tools** tab, **Customize Documents** screen.

License No./Exemption
When you enter a license type, the license exemption will fill in here if there is one. Otherwise, fill in your license number. You'll find a complete list of export license types and codes in the Appendix (see here).

License Value
For shipments requiring an export license, report the value designated on the export license that corresponds to the commodity being exported.

License Type
Select the license type from the drop-down menu. The most common selection is "C33 – No License Required." You'll find a complete list of export license types and codes in the Appendix (see here).

Free Trade Agreements Section

Based on your Ultimate Consignee's Country (entered on the EZ Start-Contacts screen), the appropriate free trade agreement information will be filled in if you have entered that information on the **Databases-Products-Free Trade Agreements** screen. You should make sure you understand how to qualify your goods under each of the appropriate free trade agreements before you ever provide an FTA Certificate of Origin to an importer.

You may skip the fields in this section if your shipment does not qualify—or you are not sure it qualifies—for preferred tariff treatment under a U.S. free trade agreement.

See the FTA Code Chart for a summary of the Preference/Origin Criteria definitions. For a detailed explanation of each of the agreement's rules of origin and what the abbreviations and citations represent, visit the U.S. Trade Information's website, www.export.gov/FTA/index.asp.

Bill of Lading Section

Shipping Solutions gives you two options for printing a Shipper's Letter of Instructions, Inland Bill of Lading, Ocean Bill of Lading and Dock Receipt. If you want the same product detail to appear on these export forms as you do on the invoices, you'll need to enter the data shown below. If you want a summary of your products to appear on these export forms rather than a detailed listing of the products, you can leave the fields in the **Bill of Lading** section blank. Instead, you will enter that information on the **Product Summary** screen (see here).

The only exception is if you need a Canada Customs invoice or CARICOM invoice; in that case, you will always need to enter the number and type of packages here.

Number of Packages
Enter the number of packages in which this line item is packed. The information will appear on the Canada Customs Invoice, CARICOM Invoice, and Inland Bill of Lading.

Type of Packages
Enter the type of package (e.g. box or pallet). The information will appear on the CARICOM Invoice.

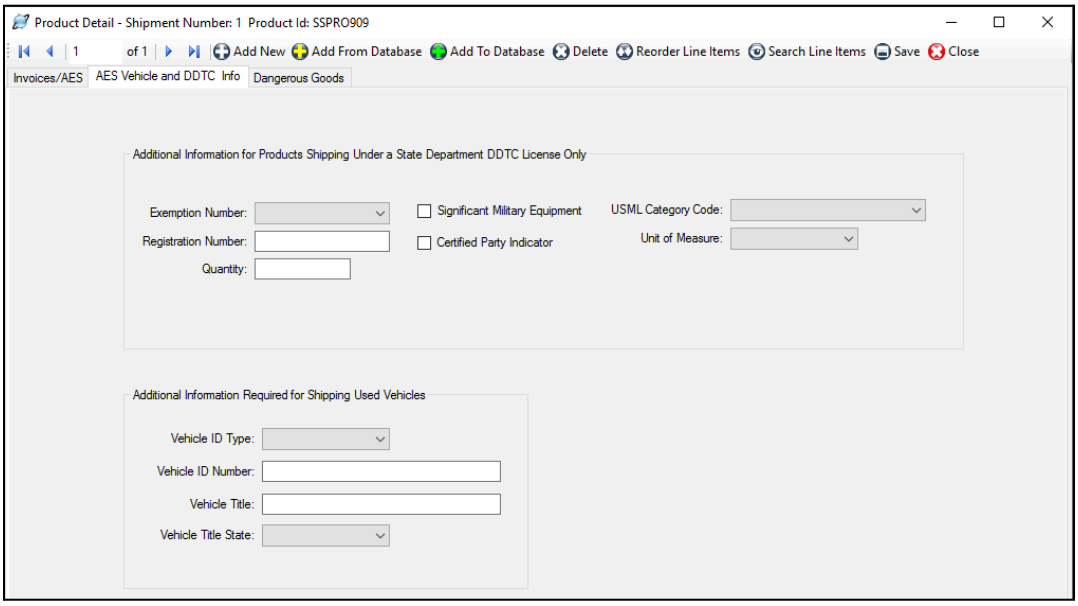
Package Measurements
Enter the dimensions of the package(s) for this line item.

Marks and Numbers
Enter any distinguishing information for your packages for this line item such as a container and seal number.

Hazardous Material
Check this box if this item qualifies as hazardous under Department of Transportation regulations.

Inland Bill of Lading Rate
Enter the rate that should appear on the Inland Bill of Lading for this line item.

The AES Vehicle and DDTC Info Tab on the Product Detail Screen



AES Vehicle and DDTC Info Tab

Certain products shipping under a State Department license are required to include additional DDTC information that can be found on the **AES Vehicle and DDTC Info** tab on the **Product Detail** screen. This requirement doesn't affect most exporters, who should simply skip this section. If it does apply to your company, enter information into the following fields:

Exemption Number
If required by the license type, select the exemption number from the drop-down menu that is the specific citation from the International Traffic in Arms Regulations (ITAR) (22 CFR 120-130) that exempts the shipment from the requirements for a license or other written authorization from DDTC.

Significant Military Equipment
Check this box if this line item appears on the United States Munitions List (USML) for which special export controls are warranted because of their capacity for substantial military utility or capability. See Section 120.7 of the ITAR (22 CFR, 120-130) for a definition of SME and Section 121.1 for items designated as SME articles.

USML Category Code
If required by the License Type, select from the drop-down menu the USML category of the article being exported (22 CFR 121).

Registration Number
If required by the license type, enter the number assigned by DDTC to persons who are required to register per Part

122 of the ITAR (22 CFR, 120-130), that has an authorization from DDTC (license or exemption) to export the article.

Certified Party Indicator
Check this box if the U.S. exporter can certify that the exporter is an eligible party to participate in defense trade. See ITAR (22 CFR 120.1(c)). This certification is required only when an exemption is claimed.

Unit of Measure
If required by the license type, select the unit of measure for this line item from the drop-down menu.

Quantity
If required by the license type, enter the quantity for the line item being shipped. The quantity is the total number of units that corresponds to the Unit of Measure field (see above).

Also, on the **AES Vehicle and DDTC Info** tab on the **Product Detail** screen is the information required if you are shipping a used vehicle anywhere except to Puerto Rico:

Vehicle ID Type
Select either VIN (Vehicle Identification Number) or Product ID from the pull-down menu.

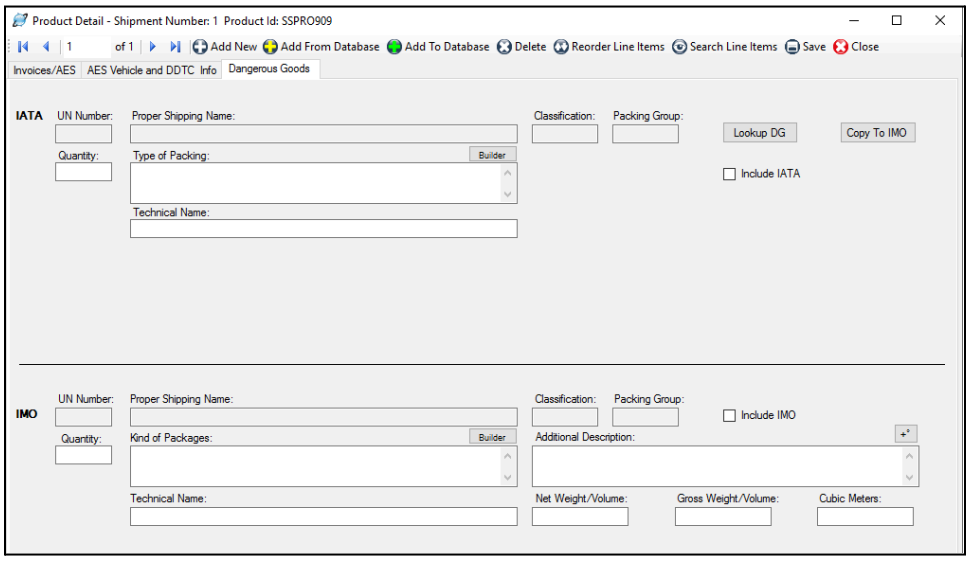
Vehicle ID Number
Enter the VIN or ID number for the vehicle.

Vehicle Title
Enter the unique title number issued by the state in which the vehicle title was issued.

Vehicle Title State
Enter the two-digit state code for the state in which the vehicle title was issued.

Once you have filled in all the **Product Detail** fields, click the **Save** button and then the **Close** button.

The Dangerous Goods Tab on the Product Detail Screen



Dangerous Goods Tab

If your item is considered a dangerous good (DG) by either the International Air Transport Association (IATA) or the International Maritime Organization (IMO), you will want to complete the appropriate fields on this screen so that you can prepare the proper documentation for your shipment. The screen is divided into **IATA** and **IMO** sections.

If you have already stored your DG information in the **Products** database, it will automatically populate on this screen when you add the product to your shipment. If not, click **Lookup DG** to search for your item in the IATA Database of Dangerous Goods. You can search the database by UN Number or Proper Shipping Name. When you've located your item, highlight the row and click the **Select** button. The IATA Database will provide the **UN Number**, **Proper Shipping Name**, **Classification** and **Packing Group**.

Since your shipment is either an air or ocean shipment, but not both, you do not need to complete both the IATA and IMO sections of this screen. However, if this is an ocean shipment you can click **Copy to IMO** to get this information into the IMO section. The **UN Number**, **Proper Shipping Name**, **Classification** and **Packing Group** are not always the same for IATA and IMO, so you may need to edit the IMO information. Continue working in either the IATA or IMO section, whichever pertains to your shipment.

DISCLAIMER

Proper training is required under federal and/or state regulations to handle dangerous goods and/or hazardous materials. All persons and entities must comply with all federal regulations, including but not limited to the specific training requirements of 49 C.F.R. (172.000– 172.704).

InterMart provides this form and instructions to assist properly trained shippers. The materials provided by Shipping Solutions in no way alter, satisfy or influence any federal or state requirements. The information provided does not meet the training requirements as required in DOT 49 CFR.

The study and/or use of Shipping Solutions software does not qualify an individual to prepare, package, transport or otherwise handle dangerous goods or hazardous materials.

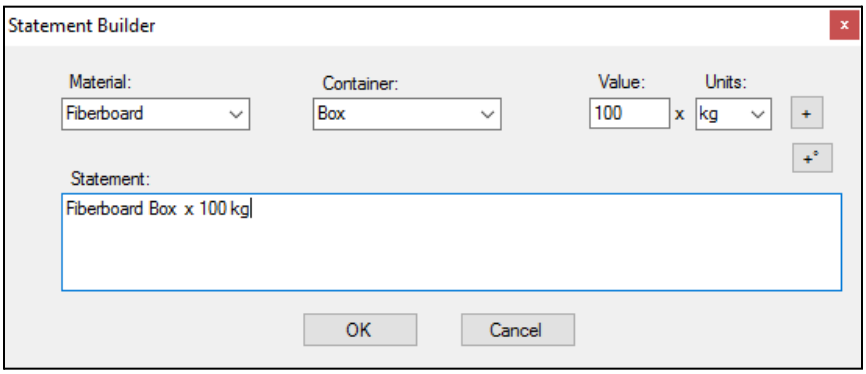
The information contained in this document is subject to change or update due to changing government regulations. The user of this document assumes responsibility for complying with all applicable laws and regulations regarding the shipment of dangerous goods.

InterMart shall not be held responsible for any loss, injury and/or damage caused by errors, omissions, misprints or misrepresentations of the contents of this software, forms or documentation or for any unauthorized or inappropriate use.

IATA Section

Enter the **Quantity**. Since this could be different from the commercial invoice quantity, it is not copied from the Invoices tab.

The Statement Builder Screen for Dangerous Goods



If you did not enter your packing information in the Product Database, you can type it directly in the **Type of Packing** box, or you can click the **Builder** button. On the **Statement Builder** screen, choose your **Material** and **Container** from the drop-down lists. Enter the amount in the containers in the **Value** box and either **L** for liters or **kg** for kilograms from the **Units** drop-down list. Click the plus button to add the **Value** and **Units** to your type of material and container in the **Statement** box. Use the degree button to add that symbol to a flashpoint, if needed. You can also use this box, if needed, to describe an overpack. Click **OK** to return to the DG tab.

If your DG item requires a technical name following the **Proper Shipping Name**, enter it in the **Technical Name** box. Do not include the required parenthesis because Shipping Solutions will automatically add them.

The **Include on IATA** check box will default to checked. If for some reason you do not want to include this item on your Dangerous Goods IATA document, uncheck the box.

IMO Section

Enter the **Quantity**. Since this could be different from the commercial invoice quantity, it is not copied from the Invoices tab. If weights were pulled in from the Product Database, they will be multiplied by the Quantity to get a total weight.

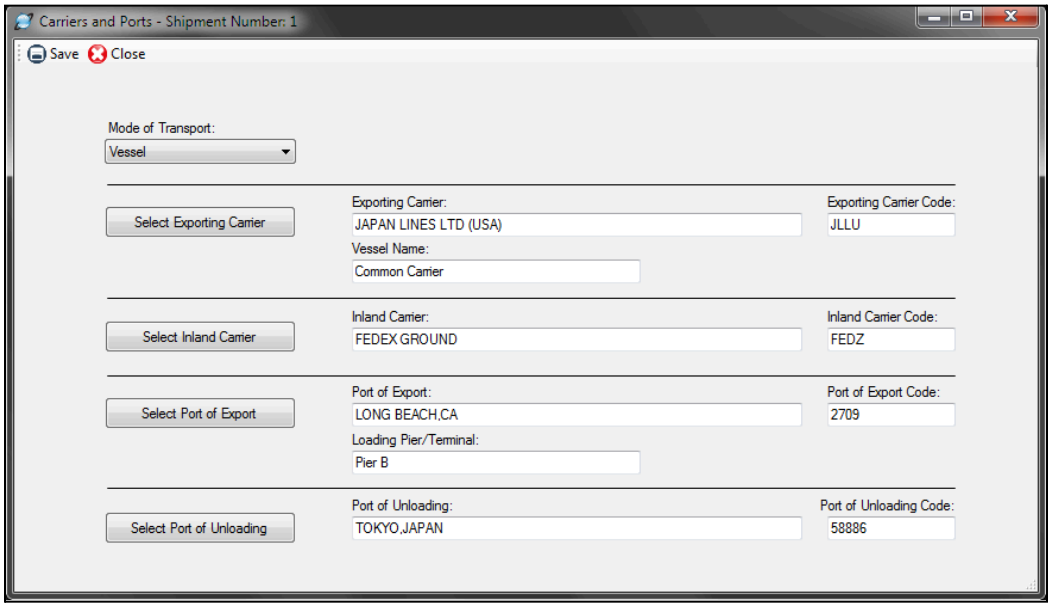
Type directly in the **Kind of Packages** box or click the **Builder** button as described in the IATA section. Use the **Additional Description** box to enter any information that you want to follow the **UN Number**, **Proper Shipping Name**, **Classification** and **Packing Group**. This information could include a flashpoint, so a degree button is provided to add that symbol.

The **Include on IMO** checkbox will default to checked. If for some reason you do not want to include this item on your Dangerous Goods IMO document, uncheck the box.

If your DG item requires a **Technical Name**, enter it in the box. Enter the name without parenthesis, which will be added automatically to the document.

The Dangerous Goods IMO document shows **Gross Weight/Volume** and either **Net Weight/Volume** or **Cubic Meters**, and you can enter the values here. Choose which values to display on the **Tools** tab, **Customize Documents**, **Dangerous Goods IMO** screen. You can also change the **Field Labels** on that screen to indicate whether you are showing weight or volume.

The Carriers and Ports Screen in EZ Start



Carriers and Ports Screen

This screen allows you to specify your shipment's method of transportation and the carriers and ports that will be used to transport your goods. This information is used on various forms and for filing your EEI with AES.

Mode of Transport

Choose the method of transportation for your shipment from the drop-down list of choices supplied by U.S. Customs and Border Protection. For transshipments to Canada, the mode of transport should be that of the border-crossing carrier, not that of the carrier that transports the goods to the country of ultimate destination.

Select Exporting Carrier

Depending on the method of transportation you chose above, either the air (IATA) or ocean and land (SCAC) carriers will become available when you click the **Select Exporting Carrier** button. To search for your carrier, choose either **Code** or **Name** in the **Column** drop-down list, choose **Starts With** or **Contains** in the **Match** drop-down list, and type the corresponding information for your carrier in the **Search For** box. Click on the correct carrier and then click **Select**. The carrier name and code will be filled in on the **Carriers and Ports** screen. For transshipments to Canada, the carrier code should be that of the border-crossing carrier, not that of the carrier that transports the goods to the country of ultimate destination.

Vessel Name

Enter the vessel name for ocean shipments or the carrier name for air, truck and rail shipments. For air shipments, the **Vessel Name** should match the **Exporting Carrier**. If you have selected Air as the **Mode of Transport** before selecting the **Exporting Carrier**, the exporting carrier's name will automatically be entered into the **Vessel Name** field. Enter Unknown for Auto; Pedestrian; Road, Other; Mail; Passenger, Hand Carried or Fixed Transport.

Select Inland Carrier

Click the button and select the carrier that will move your shipment to the port of export. You can search for your carrier as described under **Select Exporting Carrier**.

Select Port of Export

Click the button and select the port of export. For transshipments to Canada, the port of export is the port where your shipment crosses the U.S./Canadian border, not the port from which the goods are shipped to the country of ultimate destination.

Loading Pier/Terminal

Enter the name of the pier or terminal on which your goods are loaded on the export carrier's vessel.

Select Port of Unloading

Click the button and select the port in which your shipment will be unloaded from the exporting carrier. This field is not required for AES filings when you are shipping by air.

If you cannot locate a specific port, it may be because that port has a different name than you expect. The U.S. Census Bureau has combined certain foreign ports into larger groupings called "All Other Ports…." For example, "All Other Guyana Ports, Guyana." You can search for a port name in the **Carriers and Ports** database or you can ask your freight forwarder or carrier for the official port name and code.

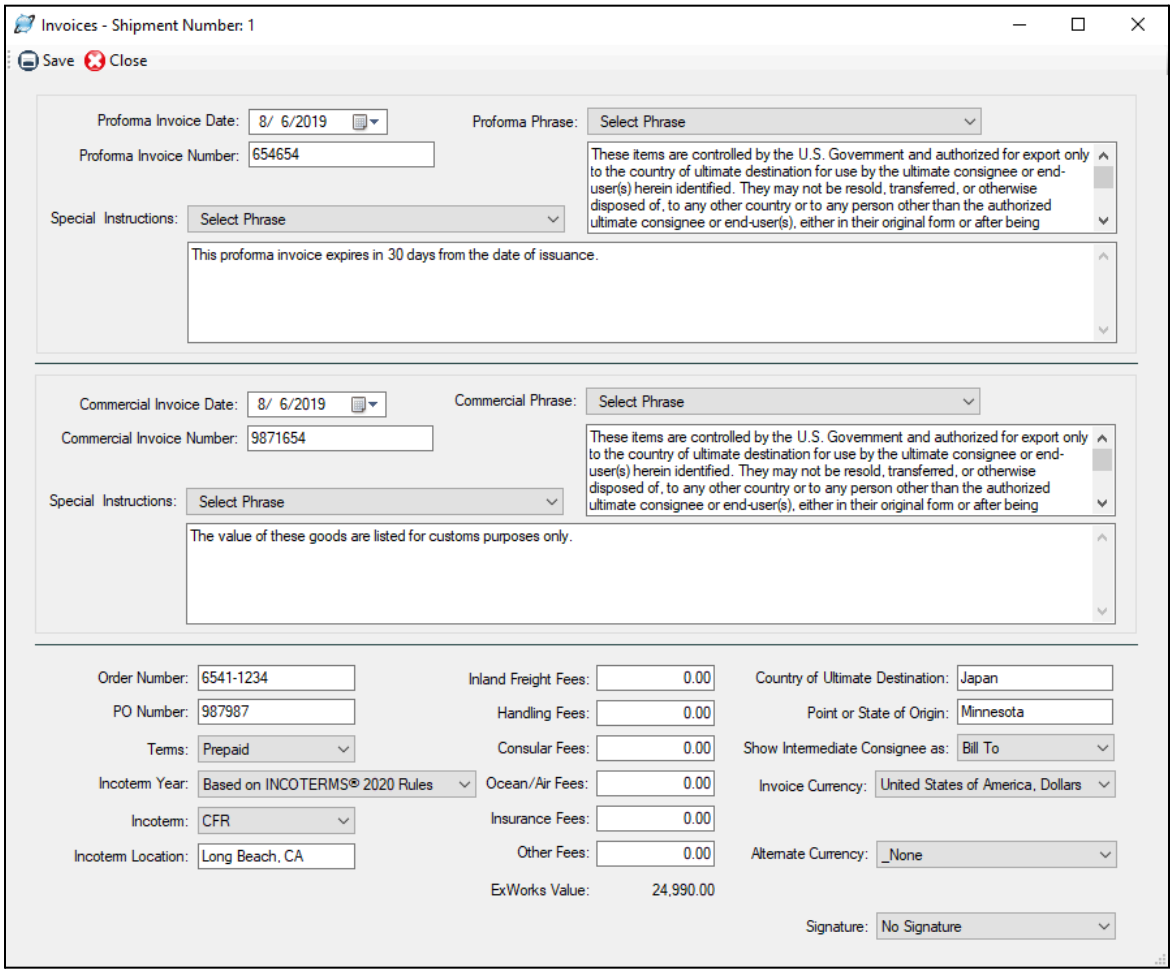
If you cannot find a specific carrier, ask your forwarder or carrier for the correct code and then add it by going to the **Databases** tab, clicking on **Carriers and Ports**, the type of code you want to add and then **Add New**.

The following list shows which export forms use what data from the **Carriers and Ports** screen:

- **Canada Customs Invoice**—Mode of Transport, Exporting Carrier, Loading Pier/Terminal
- **CARICOM Invoice**—Port of Export
- **Commercial Invoice**—Exporting Carrier, Loading Pier/Terminal
- **Dock Receipt** (all versions)—Vessel Name, Port of Export, Loading Pier/Terminal, Port of Unloading
- **Ocean Bill of Lading** (all versions)—Vessel Name, Port of Export, Loading Pier/Terminal, Port of Unloading
- **Packing List**—Exporting Carrier
- **Proforma Invoice**—Exporting Carrier, Loading Pier/Terminal
- **Shipper's Letter of Instruction** (in SED format)—Mode of Transport, Exporting Carrier, Port of Export, Loading Pier/Terminal, Port of Unloading
- **Shipper's Letter of Instruction** (with Product Detail & Summary)—Mode of Transport
- **EEI filing through AES**—All fields on the Carriers and Ports screen including the codes.

Once you have filled in the necessary information on the **Carriers and Ports** screen, click the **Save** button and then the **Close** button.

The Invoices Screen in EZ Start



Invoices—Proforma/Commercial Screen

This screen allows you to enter information about your shipment that will appear on the proforma and commercial invoices.

Proforma Invoice Date

Enter the date you want to appear on the proforma invoice.

Proforma Invoice Number

Enter the number you want to assign to your proforma invoice for this shipment.

Proforma Phrase

Select the phrases you want to appear on your proforma invoice, most commonly the anti-diversion clause. Shipping Solutions includes a database for storing commonly used instructions and phrases that your company uses, so you don't have to retype these instructions on every shipment. Click on the drop-down menu to see a list of phrases that have already been entered into the database. You can add additional phrases by going to the **Databases** tab and clicking on **Phrases**. This field allows you to display up to approximately 600 characters.

Special Instructions

Enter any special instructions you want to appear on the Proforma Invoice. Shipping Solutions includes a database

for storing commonly used instructions and phrases that your company uses, so you don't have to retype these instructions on every shipment. Click on the drop-down menu to see a list of phrases that have already been entered into the database. You can add additional phrases by going to the **Databases** tab and clicking on **Phrases**. This field allows you to enter and display up to 25,000 characters.

Commercial Invoice Date

Enter the date you want to appear on the commercial invoice. This date is also used on the Canada Customs Invoice, the CARICOM invoice, and the various versions of the Shipper's Letter of Instruction. If you have already entered an invoice date on the Canada Customs Invoice screen, the CARICOM Invoice screen or the Shipper's Letter of Instruction screen in EZ, the date will automatically appear on this screen too.

Commercial Invoice Number

Enter the number you wish to assign to your commercial invoice for this shipment.

Commercial Phrase

Select the phrase you want to appear on your commercial invoice, most commonly the anti-diversion clause. Shipping Solutions includes a database for storing commonly used instructions and phrases that your company uses, so you don't have to retype these instructions on every shipment. Click on the drop-down menu to see a list of phrases that have already been entered into the database. You can add additional phrases by going to the **Databases** tab and clicking on **Phrases**. This field allows you to display up to approximately 600 characters.

Special Instructions

Enter any special instructions you wish to appear on the commercial invoice and most of your other documents. Shipping Solutions includes a database for storing commonly used instructions and phrases that your company uses, so you don't have to retype these instructions on every shipment. Click on the drop-down menu to see a list of phrases that have already been entered into the database. You can add additional phrases by going to the **Databases** tab and clicking on **Phrases**. The information you enter on this screen will not only appear on the Commercial Invoice, it will also print on the Canada Customs Invoice, CAFTA-DR Certificate of Origin, Certificate of Origin (Generic), Dock Receipt, Ocean Bill of Lading, Packing List and Shipper's Letter of Instruction (with Product Detail and Product Summary). This field allows you to enter up to 25,000 characters.

Order Number

Enter the customer's order number or numbers for this shipment.

PO Number

Enter the customer's purchase order number.

Terms

Click on the drop-down menu to choose one of the payment options. To add additional payment terms, go to the **Databases** tab and click on **Payment Terms**.

Incoterm Year

Choose a statement clarifying whether you are using the Incoterms revised in 2020 or an earlier set of terms.

Incoterm

Maintained by the International Chamber of Commerce (ICC), this codification of terms is used in foreign trade contracts to define which parties incur the costs and at what specific point the costs are incurred. Select the correct term from the drop-down menu. The drop-down menu in this field includes the abbreviations for Incoterms® 2010 and Incoterms® 2020 rules. (For a complete listing of Incoterms 2020, see the Appendix here.)

Incoterm Location

Enter the geographic location at which the Incoterms rule takes place.

Fees

The following six fields are intended to allow you to add any additional charges to the invoices: **Inland Freight Fees**, **Handling Fees**, **Consular Fees**, **Ocean/Air Fees**, **Insurance Fees**, and **Other Fees**. You can customize your commercial and proforma invoices, so they only display the additional charges fields that you need. To change these options, go to the **Tools** tab, click **Customize Documents** and choose either the Commercial Invoice or Proforma

Invoice. Make sure the boxes are checked next to only those values and fees fields you wish to display on that specific invoice.

Country of Ultimate Destination
Enter the name of the country in which the merchandise will ultimately reside.

Point or State of Origin
Enter the state in which the merchandise starts its journey to the port of export, or the state of the commodity of the greatest value, or the state of consolidation.

Show Intermediate Consignee as
Choose from the drop-down list what you want to display in the Intermediate Consignee box on the proforma and commercial invoices: the intermediate consignee or the bill to.

Invoice Currency
(This feature is not available in Shipping Solutions Classic.) If you want your invoices in U.S. dollars, do nothing with this field. If you would like your invoices to print in a different currency, choose the currency here. The converted amounts, using the **Currency Exchange Rate**, will appear on the proforma and commercial invoices. If the currency has a symbol, the currency symbol will appear in the total price field for each line item, in the fee fields, and in the invoice total price field. The associated three-character ISO currency code (e.g. USD for U.S. dollars) will appear below the total price of the invoice. Currencies designated as favorites on the Databases tab, Currencies screen will appear at the top of the list.

Currency Exchange Rate
(This feature is not available in Shipping Solutions Classic.) Once you have chosen a different **Invoice Currency** and tabbed off the field, the **Currency Exchange Rate** field will appear. If you have an exchange rate stored in the currency database for this currency, then it will automatically fill in. Otherwise, you can enter the exchange rate directly on this screen. Shipping Solutions will multiply the exchange rate against the prices entered on the **Product Detail** screen, which should be in U.S. dollars, to get the prices in the new currency. The converted prices will appear on the proforma and commercial invoices. If the amounts on the **Product Detail** screens are in U.S. dollars, however, Shipping Solutions will file your EEI information with AES in U.S. dollars as is required by the U.S. Census Bureau.

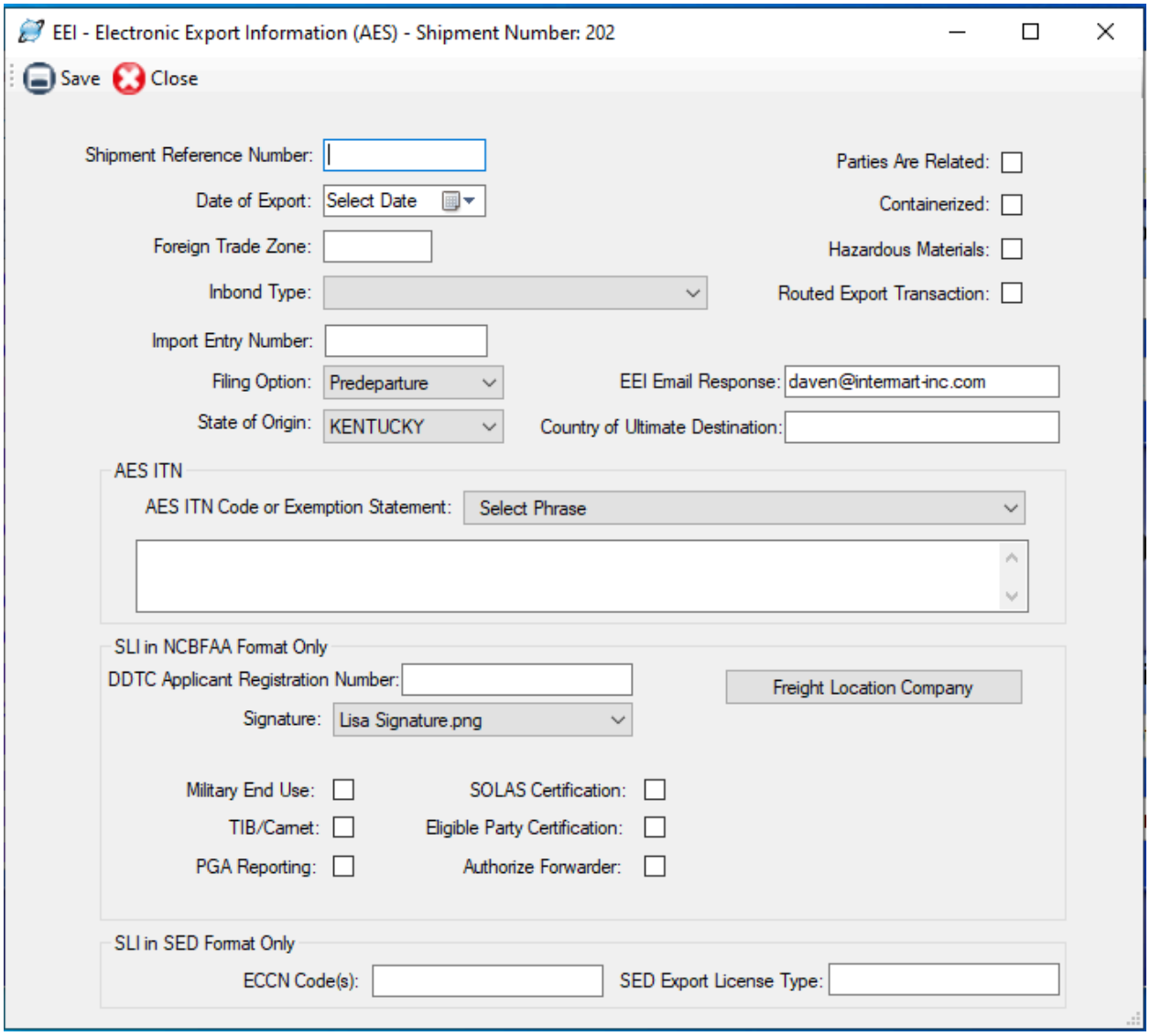
Alternate Currency
(This feature is not available in Shipping Solutions Classic.) Use this field only if you want to display a second currency on your invoice as a total only. Select the currency you wish to use from the drop-down menu. The converted total, using the **Alternate Currency Exchange Rate**, will be shown at the bottom of the invoice below the primary currency total. If the currency has a symbol, it will appear with the total. The associated three-character ISO currency code (e.g. USD for U.S. dollars) will also appear. Currencies designated as favorites on the Databases tab, Currencies screen will appear at the top of the list.

Alternate Currency Exchange Rate
(This feature is not available in Shipping Solutions Classic.) Once you have chosen an **Alternate Currency** and tabbed off the field, the **Alternate Currency Exchange Rate** field will appear. If you have an exchange rate stored in the currency database for this currency, then it will automatically fill in. If not, you can enter the exchange rate directly on this screen. Shipping Solutions will multiply the exchange rate against the total invoice value and show this amount at the bottom of the commercial and proforma invoices. If the amounts on the **Product Detail** screens are in U.S. dollars, however, Shipping Solutions will file your EEI information with AES in U.S. dollars as is required by the U.S. Census Department.

Signature
If you have assigned a signature to the profile used for this shipment, the signature file will be filled in here. However, you can choose a different signature from the drop-down list or choose **No Signature** for your commercial and proforma invoices.

Once you have filled in the invoice information, click **Save** and then **Close**. On the **Preview/Print/Email** screen you can print both the commercial invoice and the proforma invoice in either English or Spanish.

The EEI – Electronic Export Information for AES Screen in EZ Start



EEI – Electronic Export Information (AES) Screen

The information on this screen is used to complete a Shipper's Letter of Instruction (in NCBFAA format or in SED format) or to file your EEI information electronically through the Automated Export System (AES).

Shipment Reference Number

Enter a unique reference number up to 17 characters for identification purposes. This shipment reference number must be unique to your company and cannot be re-used for future shipments.

Date of Export
Enter the date the merchandise is scheduled to leave the U.S. for all methods of transportation. If the actual date is not known, report the best estimate of departure. When you know the actual date, log on to AES*Direct* and correct it. The date format should be MM/DD/YYYY.

Foreign Trade Zone
Foreign Trade Zones are specially licensed commercial and industrial areas near ports of entry where foreign and domestic goods may be brought in without being subject to payment of Customs duties. Enter the one- to five-digit alphanumeric code assigned by the Foreign Trade Zone Board.

Inbond Type
This field is used for re-export of imported goods stored in a bonded warehouse. Inbond shipments that involve a warehouse or foreign trade zone may be filed with AES for informational purposes only.

Import Entry Number
Enter the **Import Entry Number** when the export transaction is used as proof of export for import transactions, such as In-Bond, Temporary Import Bond or Drawbacks. If an **Inbond Type** is specified, you must have an entry here.

Filing Option
Select whether this AES filing is being done prior to export (**Predeparture**) or after the export (**Postdeparture**). Because most exporters must file through AES prior to their export, Shipping Solutions defaults to the **Predeparture** option.

State of Origin
Select the state in which the merchandise starts its journey to the port of export. If the shipment is composed of merchandise from more than one warehouse located in different states, provide the state with the commodity of the greatest value or the state where merchandise is consolidated.

Parties Are Related
Check this box if the parties in this shipment are related. A related-party transaction is a transaction between a USPPI and a foreign consignee (e.g., parent company or sister company) where there is at least 10% ownership of each by the same U.S. or foreign person or business enterprise.

Containerized
(For vessel shipments only.) Check this box for cargo originally booked as containerized cargo and for cargo that has been placed in containers at the vessel operator's option.

Hazardous Materials
Check this box if this shipment is hazardous as defined by the Department of Transportation.

Routed Export Transaction
Check this box if this is a routed export transaction. A routed export transaction is one in which the foreign principal party in interest authorizes a U.S. forwarding or other agent to export the merchandise out of the United States on its behalf.

EEI Email Response
AES will send you an email with your ITN number confirming that your EEI information was accepted by the Census Bureau. By default, this email will be sent to the Systems Administrator that established your company's ACE account when you registered. If you want the confirmation email to be sent to someone in addition to the Systems Administrator, enter that email address here. You can also store the email address in Shipping Solutions, so you don't have to enter it here for every shipment. To store an EEI Email Response address, go to the **Admin** tab and click on **Profile Settings**. You can enter multiple email addresses by separating each address with a comma.

Country of Ultimate Destination
Enter the name of the country in which the merchandise will ultimately reside. If you have already entered this information on the Invoices screen, this field will be filled in automatically.

AES ITN Code or Exemption Statement
If you are filing your EEI information through the Automated Export System (AES), you must be able to prove that you filed the information through AES or that your shipment was exempt from the filing requirement. To do that, you must enter the correct filing citation or exemption statement in this field.

This field will automatically print on the Shipper's Letter of Instruction, Air Waybill and Ocean Bill of Lading. If you will not be providing one or more of these forms to your freight forwarder or to the carrier, you should add this statement to the **Special Instructions** field on the **Commercial Invoice** screen. Even if you will be presenting the SLI or one of the waybills, you might want to include it on the commercial invoice anyway.

After you have filed your EEI information through AES, you'll receive an email with your Internal Transaction Number (also known as ITN number) as proof that your AES filing was accepted by the Census Bureau. The ITN number is a 15-digit code starting with the letter "X" plus the date the EEI was filed and a six-digit number generated by Census.

You must enter the ITN number into this field after the citation **AES**. For example, a citation will look like this: **AES X20121014000001**.

There are various exceptions that do not require filing your EEI information with AES. For example, if the value of the goods is less than $2,500 and the goods don't require an export license, you should enter: NO EEI 30.37(a). Shipping Solutions has populated the most common exception statements in the **Phrases** database, and they appear in the drop-down list for this field. If the one you use regularly is missing, you can add it by going to the **Databases** tab, clicking on **Phrases** and then the **Add** button. For a complete list of exceptions see part 30 of the Foreign Trade Regulations found at www.census.gov.

SLI in NCBFAA Format Only Section

If you are using the Shipper's Letter of Instruction in the format recommended by the National Customs Broker and Freight Forwarder Association of America (NCBFAA) to provide your forwarder with the EEI information for AES filing, fill in the following fields:

DDTC Applicant Registration Number
For Department of State, DDTC licensed transactions, enter your Directorate of Defense Trade Controls (DDTC) Registration Number (also referred to as the Registration Code). DDTC Registration Numbers should always be exactly six characters.

Freight Location Company
If different from the USPPI name, which is typically the exporter, enter the company name where the cargo begins its journey to the port of export.

Signature
If you have assigned a signature to the profile used for this shipment, the signature file will be filled in here. However, you can choose a different signature from the drop-down list or choose **No Signature** for your Shipper's Letter of Instruction (in NCBFAA format).

Military End Use
Check this box if any of the goods are intended for "Military End Use" or a "Military End User" in the countries listed in 15 CFR 744.21(a). Refer to 15 CFR 744.21(f) and (g) for definitions of "Military End Use" and "Military End User."

TIB/Carnet
Check this box if an item that was previously imported using a Temporary Importation Under Bond (TIB) is being

exported in the same condition or if an item is being exported using an ATA Carnet and will be returned to the U.S. in less than one year from the date of export, except those items that require an export license.

PGA Reporting
Check this box if any items require additional Partner Government Agency (PGA) reporting as in Appendix Q and X of the ACE AESTIR. This additional information should be entered in the Special Instructions of the SLI.

SOLAS Certification
Check this box to certify that the full shipment weight shown as the Gross Weight is the Certified Gross Weight which may be added to the container tare weight and used as the Verified Gross Mass (VGM) under the Method 2 of the SOLAS VGM regulation dated July 1, 2016. The weight that will be shown in the Gross Weight box is the total of the Gross Weights in Kgs on the EZ Start-Product Detail screen.

Eligible Party Certification
If you are moving cargo against an ITAR exemption, you must select Yes or No to certify that the exporter is an eligible party to participate in defense trade.

Authorize Forwarder
Check this box if you are authorizing the named freight forwarder to file the EEI through AES on your behalf.

SLI in SED Format Only Section

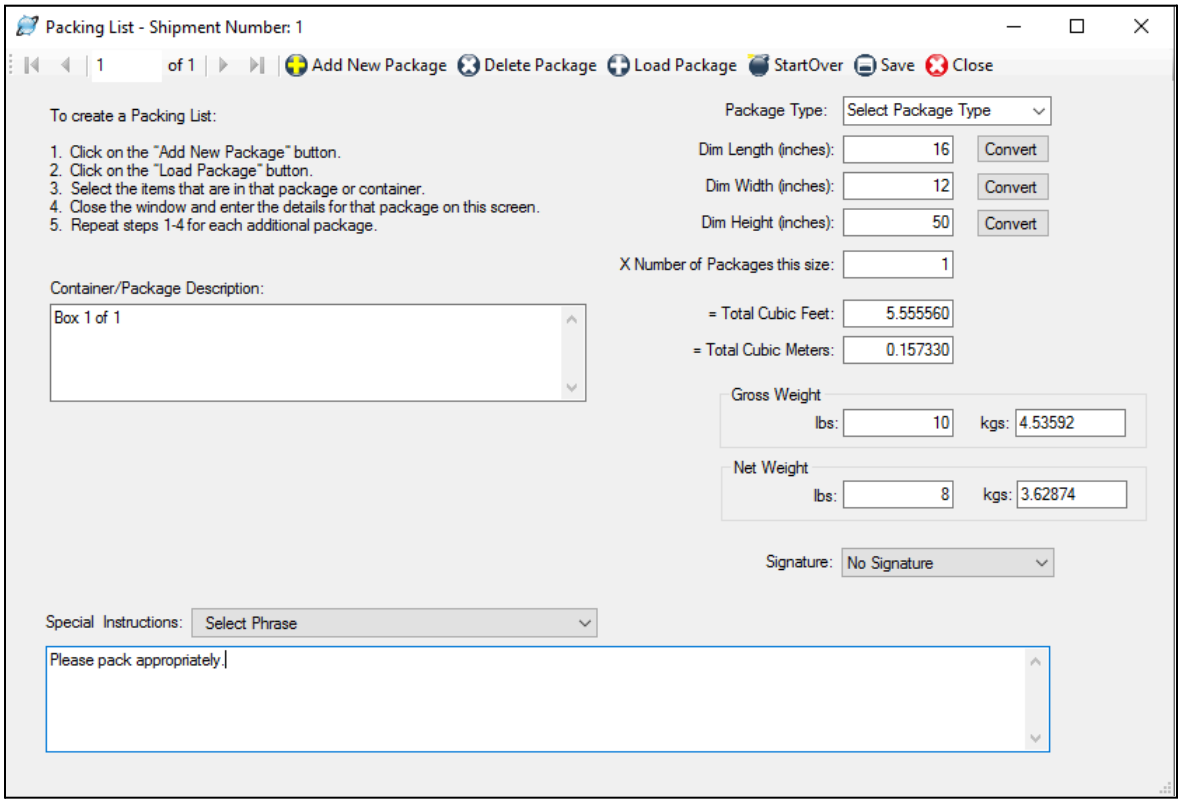
Shipping Solutions includes a version of the Shipper's Letter of Instruction based on the paper version of the old Shipper's Export Declaration. This is no longer the format preferred by freight forwarders. (See the SLI in NCBFAA format above.) However, if you wish to continue using the Shipper's Letter of Instruction (in SED format) to provide your forwarder with the information for AES filing, fill in the following fields:

ECCN Code(s)
Re-enter your ECCN number, if applicable, in this field to fit into the limited space allowed on the Shipper's Letter of Instruction (in SED format).

SED Export License Type
Re-enter a license type, if applicable, in this field to fit into the limited space allowed on the Shipper's Letter of Instruction (in SED format).

When you have entered all the necessary EEI information, click **Save** and then **Close**.

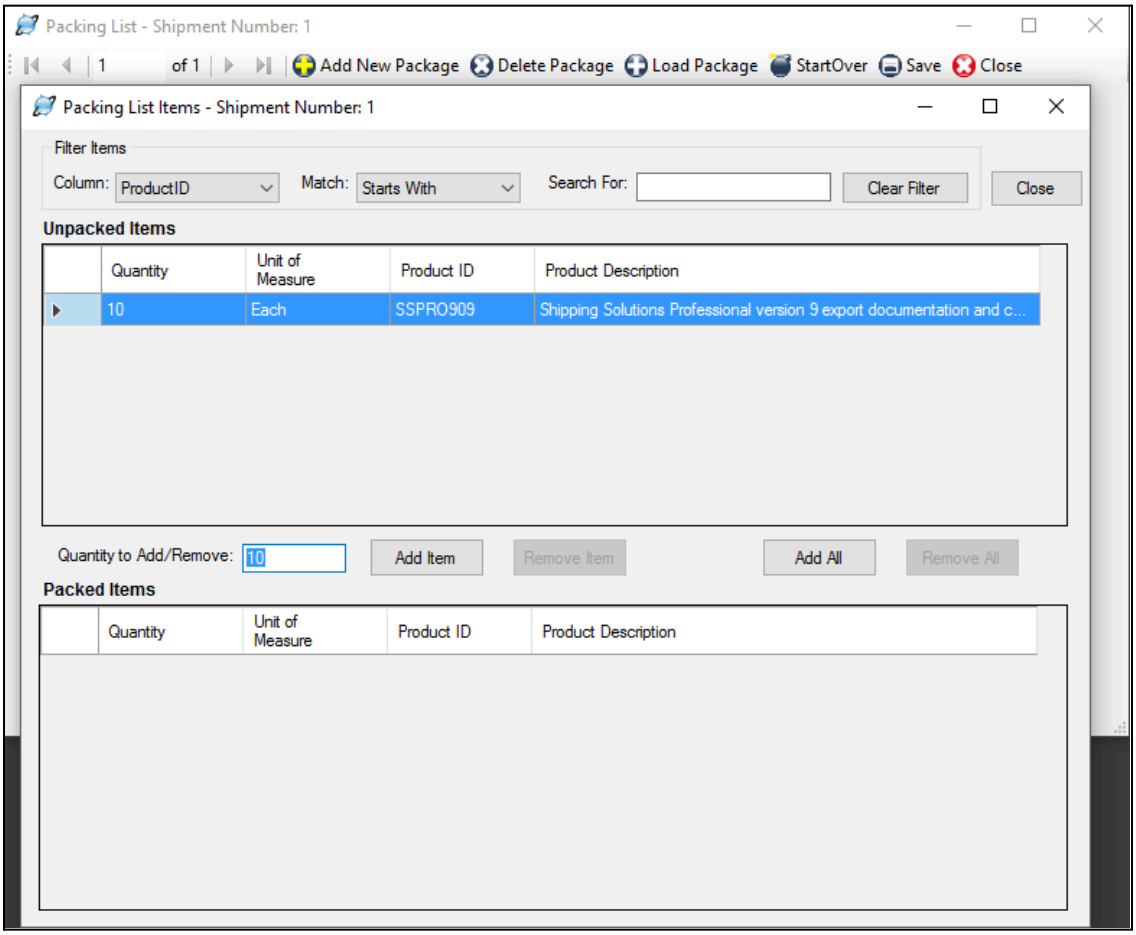
The Packing List Screen in EZ Start



Packing List Screen

The Shipping Solutions Packing List screen makes it easy to create a packing list based on each container or other packaging unit. To create a packing list, click on the **Add New Package** button. Then, click the **Load Package** button, and the **Packing List Items** screen will appear.

Loading a Container on the Packing List Screen



The **Unpacked Items** table shows a list of all the products in your shipment displaying the **Quantity**, **Unit of Measure**, **Product ID** and **Product Description**. The first time you click **Load Package** all the products you entered into the **Product Detail** screen will be listed in the **Unpacked Items** list (unless you excluded specific products from the packing list on the Product Detail screen – see "Display Products On" here). If you have a very long list of products, you can search for specific products using the **Filter Items** box.

There are several ways to load the packages:

- Click **Add All** to pack all your line items in one package.
- Click on a line item in the **Unpacked Items** list. Click **Add Item** to add the entire amount of that item to this package.
- Click on a line item in the **Unpacked Items** list. Change the **Quantity to Add/Remove** to add a subset of this line item to the current package and then click **Add Item**. For example, although you may have entered a total of 10 widgets on the **Product Detail** screen, you may want only six widgets in the current package. Adding six widgets to this current package will reduce the total number of remaining widgets from 10 to four in the **Unpacked Items** window. You will enter those remaining four items in a different package.

You will see your items move from the **Unpacked Items** list to the **Packed Items** list. If you need to make a change to the packed items, use **Remove All** to move all the items for this package back to the **Unpacked Items** list. Use **Remove Item** along with the **Quantity to Add/Remove** to move a subset of items from packed to unpacked. Click **Close**.

If you did not load all your line items in the first package, click **Add New Package** again to create a second package. Click **Load Package**. You will see the remaining items to pack in the **Unpacked Items** list. You will not see the items you packed in the first container. Load the second package using the same process you used with the first package. Continue adding packages until all your line items appear in the **Packed Items** list for one of the packages.

When you have finished selecting the products you wish to load in each package of your shipment, there shouldn't be any more products in the **Unpacked Items** window. If you leave any products in your **Unpacked Items** list, you will have a discrepancy between your invoices and the packing list.

Please note: Because the process of loading your packing list packages uses the items you previously entered on the **Product Detail** screen, any change in the quantity of items that you entered on that screen could make your packing list inaccurate. If you increase the quantity of one or more of your items on the **Product Detail** screen, you will need to return to the **Packing List=>Load Package** screen to add the additional products to the packing list form.

If you try to lower the quantity of one or more of your items on the **Product Detail** screen, Shipping Solutions will prevent you from doing so. You will first need to return to the **Packing List=>Load Package** screen and unpack the item or items you wish to change from the packing list. Once you have made your change(s) on the **Product Detail** screen, you'll then repack the item on the Packing List screen.

Enter the dimensions and weights for each package. Move between the different packages using the blue arrows in the upper left corner of the **Packing List** screen. The fields are defined below:

Package Type
You can store commonly used package types in the **Package Types** database (see here) and select them from the drop-down list.

Dimensions
Enter the length, width and height of an individual package in inches. If you don't have this information available in inches, you may enter the dimensions in whatever measurement you have and then click on the **Convert** button next to each of the dimension fields. The number you entered will be displayed in the **Value to Convert** box and inches will be selected in the **To** box. Choose the measurement of the number you entered (e.g. centimeters) and click **Convert**. The amount you entered converted to inches will be displayed in the dimensions box.

X Number of Packages this size
Enter the number of packages that are of the dimension listed above.

Total Cubic Feet and Meters
Shipping Solutions will automatically calculate the total cubic feet and meters based on the dimensions and quantities entered above. You can display up to five decimal places on the packing list. (You can control this option on the **Tools=>Customize Documents=>Packing List** screen.)

Gross and Net Weight
Enter the gross and net weights of this package in pounds or kilograms, and Shipping Solutions will automatically fill in the other box. You can display up to five decimal places on the packing list. (You can control this option on the **Tools=>Customize Documents=> Packing List** screen.) If you want the gross and net weight to be automatically calculated based on your entries on the EZ Start=>Product Detail screen, go to the **Admin=>Global Settings** screen and check the box labeled **Calculate Packing List Weight**.

Once you have loaded all your packages and entered the dimensions and weight of each, you have the option of adding a signature and special instructions to your packing list:

Signature
If you have assigned a signature to the profile used for this shipment, the signature file will be filled in here. However, you can choose a different signature from the drop-down list or choose **No Signature** for your packing list.

Special Instructions
Choose any special instructions from the drop-down list or enter them directly in the box. You also have the option

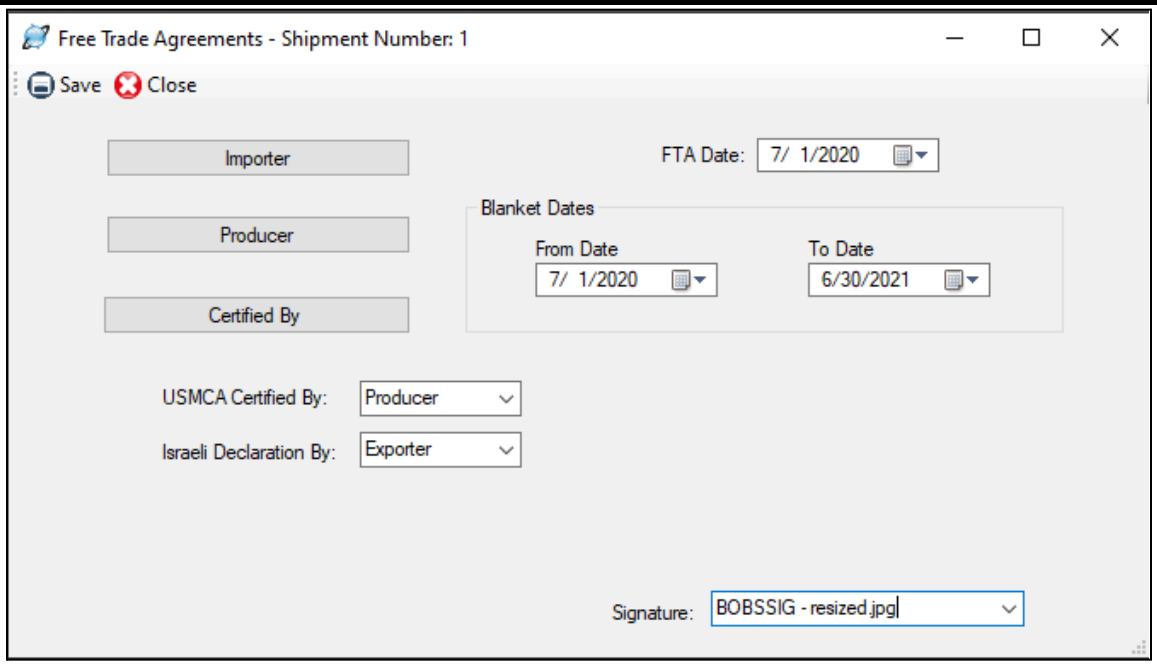
to display the Special Instructions that you entered in the **Commercial Invoice** section of the **Invoices – Proforma/Commercial** screen. (You can control this option on the **Tools=>Customize Documents=>Packing List** screen.) If you turn this option on, the Packing List Special Instructions will appear on the Packing List form below the Commercial Invoice Special Instructions.

Use the **Delete Package** button on the toolbar to delete a package from your shipment. Any items that were loaded in that package will be returned to the **Unpacked Items** list.

If you need to make significant changes to your packing list, it may be easier to click the **StartOver** button on the toolbar, which will unpack all your items and delete all your packages for this shipment record. You can then begin the process of creating a new packing list from scratch.

When you have loaded all your packages and entered all the weight and dimension information click **Save** and then **Close**. You can print the packing list on the **Preview/Print/Email** screen.

The Free Trade Agreements Screen in EZ Start



Free Trade Agreements Screen

Fill in the information on this screen if you need to complete an FTA Certificate of Origin.

Importer

State the full legal name and address (including country) of the importer. If the importer is not known, state "Unknown." If multiple importers, state "Various." To add importer, click the **Importer** button. You can type the name and address here or click **Add Contact from Database**. The **Select Database** field defaults to the **Miscellaneous** database, but you can choose a contact from any database by choosing the database from the **Select Database** drop-down list. To search for a particular contact, choose **Starts With** or **Contains** from the **Match** drop-down list and start typing the contact's company name in the **Search for Company** box. Click on the contact you want and click **Add Contact**. Click **Save** and **Close**.

Producer

State the full legal name and address (including country) of the producer. If more than one producer's goods are included on the certificate, manually attach a list of the additional producers including the legal name, address and legal tax identification number, cross-referenced to the products you are shipping. If you wish this information to be confidential, you may state "Available to Customs Upon Request." If the producer and the exporter are the same, enter "Same." If the producer is unknown, it is acceptable to enter "Unknown." To add a producer, click the **Producer** button. You can type the name and address here or click **Add Contact from Database** and follow the process described under **Importer**.

Certified By

Enter the contact information for the company that is completing and signing the USMCA Certification of Origin or other free trade agreement certificate for this shipment or for these products. This form can be produced and signed by either the producer or the exporter of the goods, if they are different companies. To add click the **Certified By** button. You can type the name and address here or click **Add Contact from Database** and follow the process described under **Importer**.

FTA Date

Enter the date that should appear on the Certificate of Origin.

Blanket Dates

Complete these fields if the Certificate of Origin covers multiple shipments of identical goods exported for a specified period of up to one year. **From Date** is the date upon which the Certificate becomes applicable to the goods covered by the blanket certificate (it may be prior to the date of signing this Certificate). **To Date** is the date upon which the blanket period expires. The importation of a good for which preferential treatment is claimed based on this Certificate must occur between these dates. On the USMCA certificate, the invoice number will not appear on the form if a blanket date is entered.

USMCA Certified By

Choose **Importer**, **Exporter** or **Producer** depending on which party is certifying the goods. This information will appear on all versions of the USMCA Certificate of Origin.

Israeli Declaration By

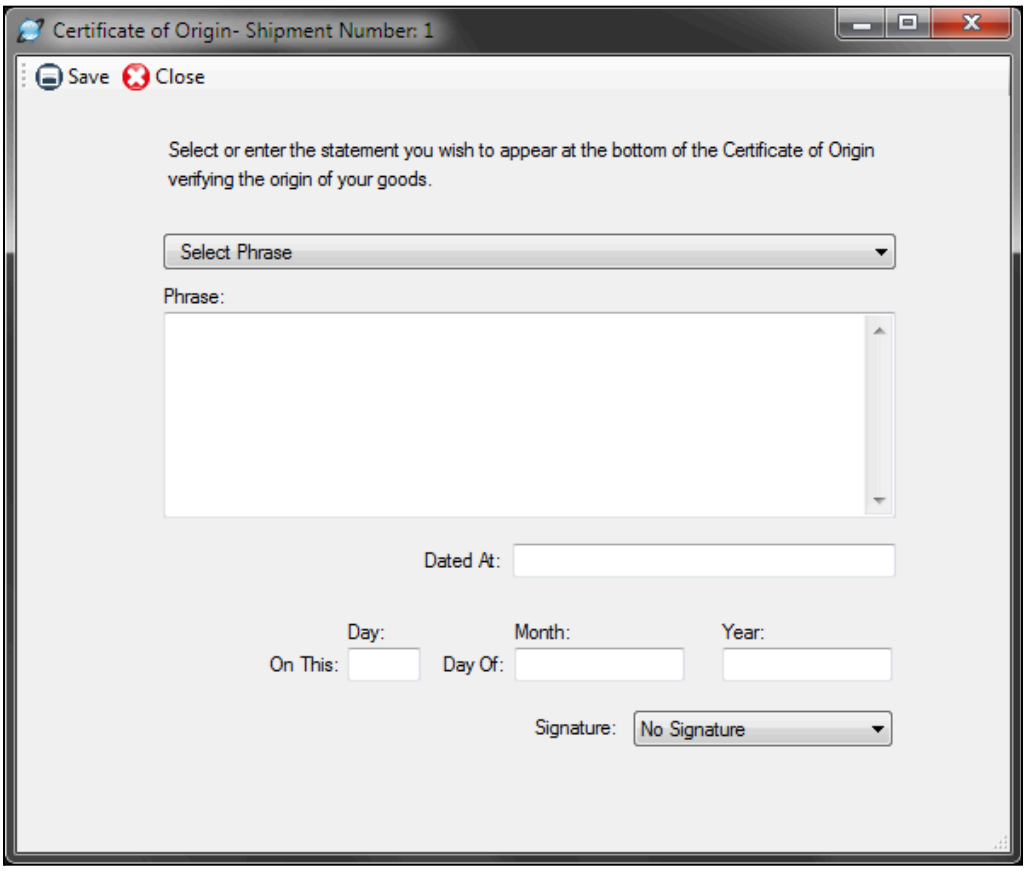
Choose **Exporter** or **Producer** depending on which party is certifying the goods. This information will appear on the **Commercial Invoice for Israel**.

Signature

If you have assigned a signature to the profile used for this shipment, the signature file will be filled in here. However, you can choose a different signature from the drop-down list or choose **No Signature** for your FTA forms.

When you have filled in the information for your FTA certificate of origin, click **Save** and then **Close**.

The Certificate of Origin Screen in EZ Start



Generic Certificate of Origin

Fill in this screen if you need to prepare a generic Certificate of Origin. Because most of the information that appears on this certificate of origin was entered on previous screens, you don't need to enter much on this screen.

Phrases

You can select a verifying phrase (if necessary) from the **Phrases Database** drop-down menu. A typical phrase reads: "The Chamber of Commerce of _____, a recognized Chamber of Commerce under the laws of the State of _____, has examined the manufacturer's invoice or shipper's affidavit concerning the origin of the merchandise and, according to the best of its knowledge and belief, finds that the products named originated in the United States of North America." To modify the phrase for your company, go to the **Databases** tab and click **Phrases**.

Dated At

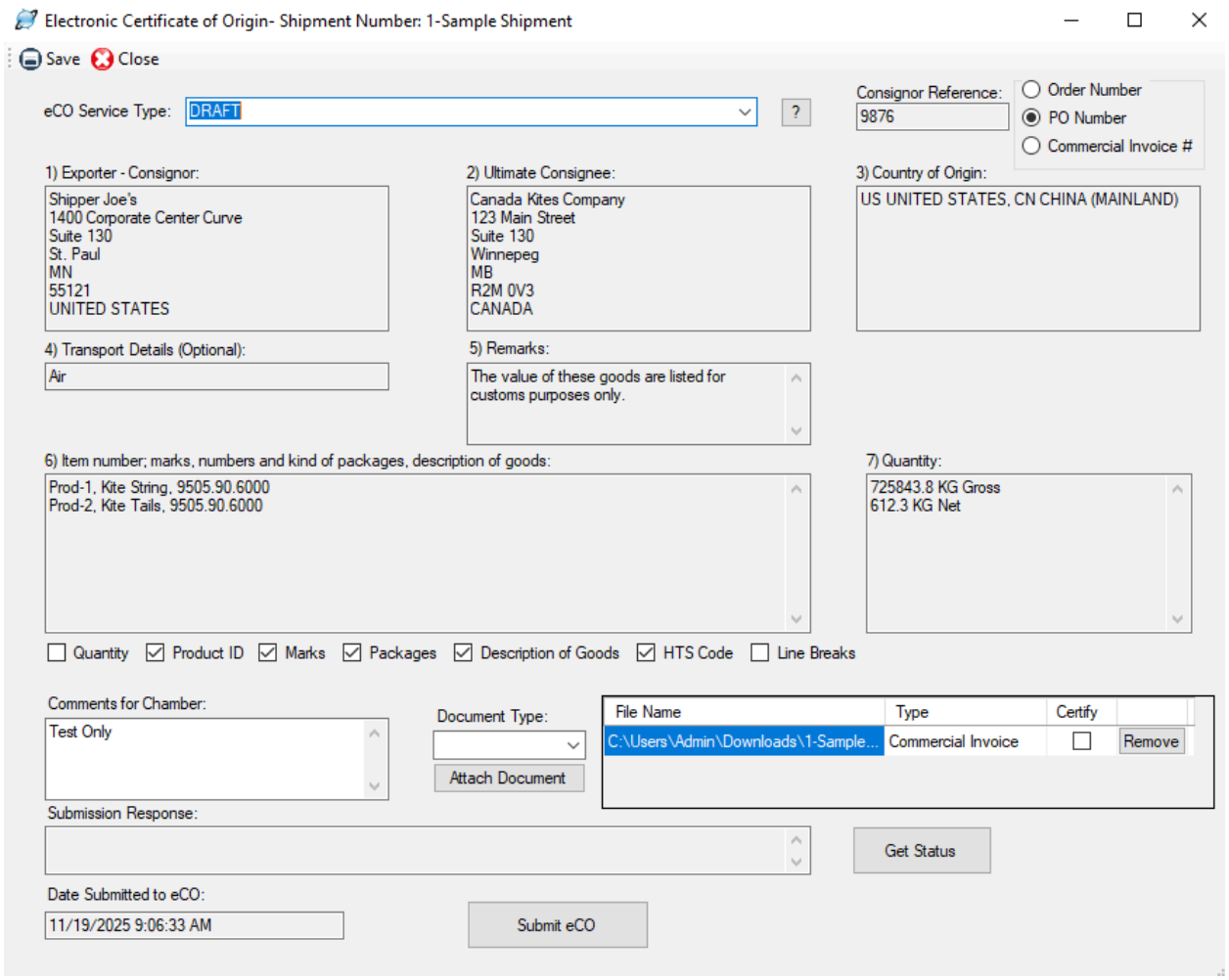
Enter the location where the company official will sign the certificate of origin.

Day/Month/Year

Enter the date on which the company official will sign the certificate of origin.

When you have filled in all the generic certificate of origin fields, click **Save** and then **Close**. You can print the generic certificate of origin on the **Preview/Print/Email** screen.

The Electronic Certificate of Origin Screen in EZ Start



Electronic Certificate of Origin

Shipping Solutions offers a fast and easy way for exporters to get a Certificate of Origin certified by the American World Trade Chamber of Commerce (AWTCC), whose seal is registered with customs authorities worldwide. Rather than creating a paper certificate and taking it to a chamber to be certified, Shipping Solutions allows you to use the information you already have entered in the software, upload it to the chamber, and have a chamberized certificate delivered to you either electronically or by courier.

The first step is to register with AWTCC. To register go to www.shippingsolutionssoftware.com/certificate-of-origin. Fill in the required information. After your registration has been processed, you will receive an email from the AWTCC with instructions for setting up your password. Your email address along with this password allows you to login into the AWTCC's portal at www.shippingsolutionssoftware.com/electronic-certificate-of-origin-login.

However, in order to avoid retyping your shipment information into the portal, you can use Shipping Solutions to upload the information. In order to perform the upload, enter your **Email Address** and **Password** on the **Admin** tab, **Profile Settings** screen in the **eCO Login** box.

Create your shipment as you normally would and then click on the Electronic Certificate of Origin screen. In the **eCO Service Type** box, choose **Draft** to submit the application to the portal in a draft state. Later you will log into the AWTCC portal to finalize and submit your application.

Most of the other information on the Electronic Certificate of Origin screen is pulled from other EZ Start screens and cannot be modified on the Electronic Certificate of Origin screen. The boxes are filled as follows:

Consignor Reference
You have the option of using either the **Order Number**, **PO Number** or **Commercial Invoice Number** as a reference number for your Certificate of Origin. All of those numbers are entered on the **EZ Start=>Invoices** screen.

Exporter-Consignor
On the **EZ Start=>Contacts** screen, select **Exporter** in the white box and fill in your company's name and address.

Ultimate Consignee
On the **EZ Start=>Contacts** screen, select **Ultimate Consignee** in the white box and fill in your customer's name and address.

Country of Origin
On the **EZ Start=>Product Detail** screen, select the **Country of Origin** for each of your line items. The countries of origin for all your line items will be combined into this box.

Transport Details
On the **EZ Start=>Carriers and Ports** screen, select the **Mode of Transport**. This box is optional.

Remarks
On the **EZ Start=>Invoices** screen, fill in the **Commercial Invoice Special Instructions**. This box is optional.

Items
This box includes items from the **EZ Start=>Product Detail** screen. You can control what information is included by using the check boxes below the box. If you want your line items separated by line breaks, check the **Line Breaks** box.

Quantity
This box adds up the **Gross Weight** and **Net Weight** of all your line items. The weights are entered on the **EZ Start=>Product Detail** screen.

Comments for Chamber
Enter any information you want to communicate to AWTCC. This box is not pulled from any other screen.

You must attach a PDF version of your Commercial Invoice that shows the countries of origin for each line item. You can create the PDF on the **EZ Start=>Preview/Print/Email** screen. Then choose **Commercial Invoice** in the **Document Type** box and click **Attach Document**. Navigate to where you saved the PDF of your Commercial Invoice and click **Open**.

If you also want the chamber to certify your Commercial Invoice, check the certify box next to the document once it is loaded. In addition, you can attach other documents for AWTCC to certify. Just choose the **Document Type** and click **Attach Document**.

When everything is completed to your liking, click **Submit eCO**. A box will pop up indicating whether your draft application was successfully submitted.

Then login to the AWTCC portal (www.shippingsolutionssoftware.com/electronic-certificate-of-origin-login), and you will be on the **Active Applications** screen. The draft application you submitted should be at the top of the list (or click the **Last Activity** heading to get the newest applications to the top). Click to review your application.

In the Application Details section choose your processing method.

Electronically Return Certified PDF

Click this option if you want to print the certificate yourself on a color printer. The certificate will include a digitally imaged Chamber seal and signature printed on your certificate over a security background.

Chamber Print, Wet Stamp/Sign and Ship

Click this option if you want to have AWTCC print your certificate, hand stamp and sign it, and return it to you by overnight courier. Courier fees will be added to the certification fee.

Legalize/Apostille and Ship

If you choose this option, courier fees will be added to the certification fee. You can enter any instructions for the chamber in the box below.

Click the appropriate option and then click **Submit Application**. You will be asked to enter your credit card information. You can request that the credit card be saved for future submissions. Your credit card will only be charged when your eCO is approved.

Once the eCO application is submitted, you will return to the **Active Applications** screen. The status of the eCO changes from **Draft** to **At Chamber**.

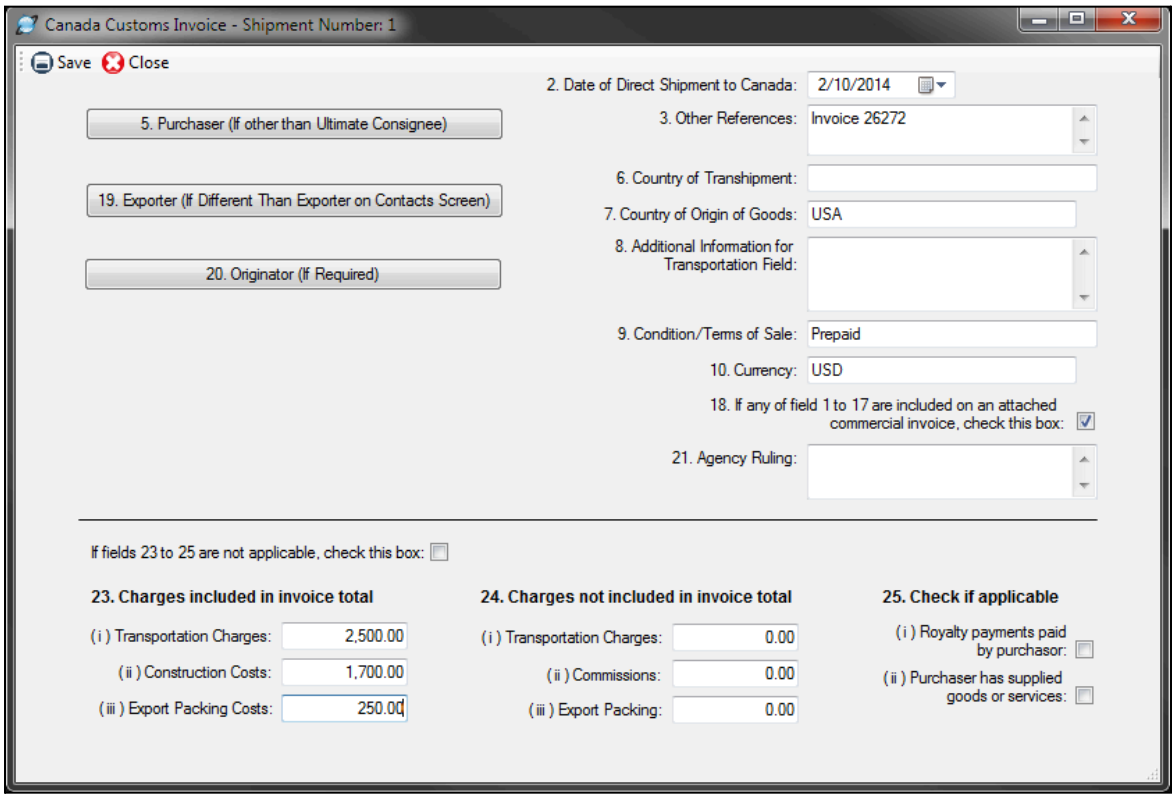
After the chamber has reviewed your application, you will receive an email saying your eCO application has been approved or rejected. If your application is rejected, the email will include details of what changes are needed. Log back into the eCO portal to make changes and resubmit your application.

If your application was approved, log back into the eCO portal to print your certificate. Find your approved application on the dashboard and click **Issue**. A window will pop up with your approved eCO.

Once the eCO has been printed, it is no longer listed on the Active Applications screen. Click the **History** button to see your eCO. The status of approved certificates is **Issued**.

For help with your application or using the portal, contact Shipping Solutions (888-890-7447 or help@shippingsolutionssoftware.com). For questions about a specific eCO application, contact AWTCC (212-655-5458 or support@awtcc.org).

The Canada Customs Invoice Screen in EZ Start



Canada Customs Invoice Screen

Fill in this screen if you need to prepare a Canada Customs Invoice.

Purchaser (if other than Ultimate Consignee)

Enter the name and address of the purchaser of your goods if it is different from the ultimate consignee. To add, click the **Purchaser** button. You can type the name and address here or click **Add Contact from Database**. The **Select Database** field defaults to the **Miscellaneous** database, but you can choose a contact from any database by choosing it from the **Select Database** drop-down list. To search for a particular contact, choose **Starts With** or **Contains** from the **Match** drop-down list and start typing the contact's company name in the **Search for Company** box. Click on the contact you want and click **Add Contact**. Click **Save** and **Close**.

Exporter (if different than exporter on Contacts screen)

Enter the exporter's name and address if it is different from the exporter listed on the **Contacts** screen. To add, click the **Exporter** button. You can type the name and address here or click **Add Contact from Database** and follow the process described under **Purchaser**.

Originator (if required)

When the invoice is completed on behalf of a company, the company's name and address must be indicated. The name of the person completing the invoice may also be indicated. To add click the **Originator** button. You can type the name and address here or click **Add Contact from Database** and follow the process described under **Purchaser**.

Date of Direct Shipment to Canada

Enter the date you want to appear on the Canada Customs Invoice. This date is also used on the Commercial Invoice, Caricom Invoice, and the various versions of the Shipper's Letter of Instruction. If you have already entered

an invoice date on the Invoices screen, Caricom Invoice screen, or Shipper's Letter of Instruction screen in EZ, the date will automatically appear on this screen too.

Other References
Enter any additional information that refers to this order (such as your commercial invoice number or your customer's PO number).

Country of Transshipment
Enter the country through which the goods were shipped in transit to Canada under customs control.

Country of Origin of Goods
Enter the country of origin where the goods are grown, produced or manufactured. Each manufactured article on the invoice must have been significantly transformed in the country specified as the country of origin to its present form ready for export to Canada. Certain operations such as packaging, splitting and sorting may not be considered sufficient operations to confer origin.

Additional Information for Transportation Field
Enter the place from which the goods began their uninterrupted journey to Canada. If you entered a **Mode of Transport** and **Exporting Carrier** on the **Carriers and Ports** screen, that information will also appear in this box on the form.

Condition/Terms of Sale
State whether the goods are shipped on a sale basis, consignment shipment, lease, etc. If on sale basis, specify the terms of sale, such as Net 30 Days. Indicate whether the prices shown are FOB, CIF, etc. and details of discounts or any other special arrangements.

Currency
Indicate the currency in which the vendor's demand for payment is made.

If any of field 1 to 17 are included…check this box
If any of the information in fields 1-17 on the Canada Customs Invoice is included on an attached commercial invoice, check this box.

Agency Ruling
If your products have received a special valuation ruling, enter it here. These rulings generally reduce the Value For Duty rate applied.

If fields 23 to 25 are not applicable, check this box
If you do not need to report additional charges for transporting the goods to Canada, assembling the goods within Canada or for packing the goods, check this box.

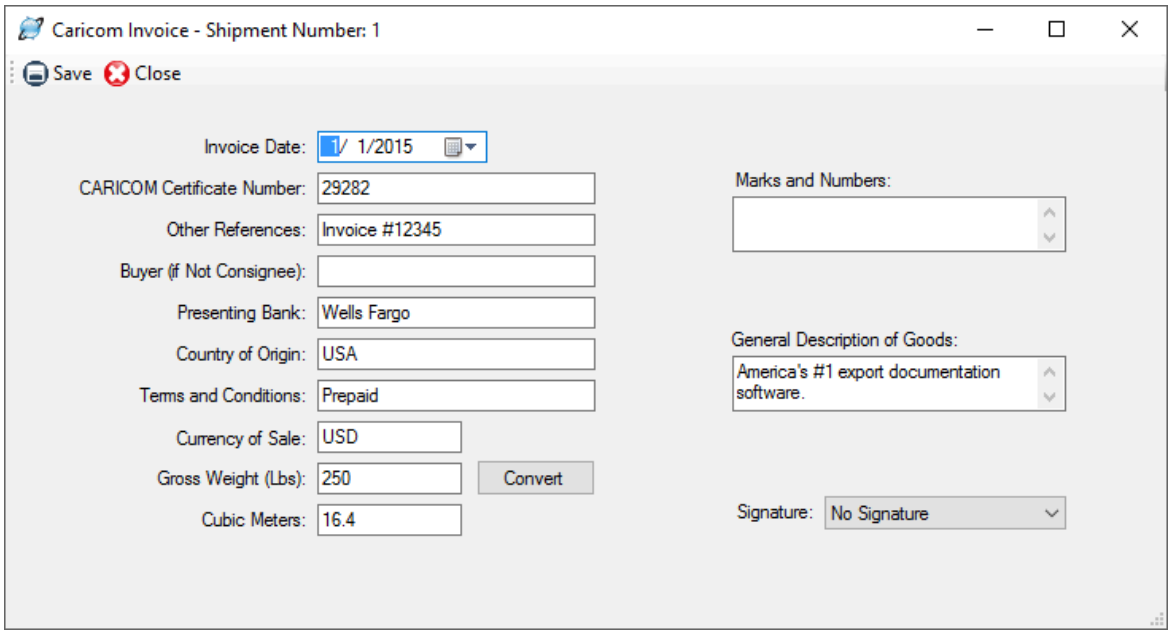
23. Charges included
If you need to report any additional charges for transporting the goods to Canada, assembling the goods within Canada, or for packing the goods, enter the information in these fields if they are already factored into the price of each line item.

24. Charges not included
If you need to report any additional charges for transporting the goods to Canada, assembling the goods within Canada, or for packing the goods, enter the information in these fields if they are not factored into the price of each line item.

25. Check if applicable
Check either box if it applies.

When you have filled in all the Canada customs invoice fields, click **Save** and then **Close**. You can print the Canada Customs Invoice on the **Preview/Print/Email** screen.

The Caricom Invoice Screen in EZ Start



Caricom Invoice Screen

The Caribbean Community and Common Market (CARICOM) was created to promote a single market and economy within its member states. A CARICOM invoice must be completed when exporting to a member country.

Invoice Date
Enter the date you want to appear on the Caricom Invoice. This date is also used on the Commercial Invoice, Canada Customs Invoice, and the various versions of the Shipper's Letter of Instruction. If you have already entered an invoice date on the Invoices screen, Canada Customs Invoice screen, or Shipper's Letter of Instruction screen in EZ, the date will automatically appear on this screen too.

CARICOM Certificate Number
Enter the invoice number.

Other References
Enter references to other documents such as the proforma invoice number and the confirmation of the order.

Buyer
Enter the name of the Ultimate Consignee of the goods.

Presenting Bank
Enter the name of the bank handling the transaction.

Country of Origin
Enter the last country in which significant production or manufacture of the goods took place. Minimal work on goods such as repacking, sorting or grading does not change the country of origin.

Terms and Conditions
Enter the terms of payment and delivery.

Currency of Sale
Enter the currency used to display the value of the goods.

Gross Weight (Lbs)
Enter the gross weight of the goods in pounds. Shipping Solutions will automatically convert it to kilograms. If you don't have the gross weight available in pounds, you may enter the weight in whatever measurement you have and then click on the **Convert** button. The number you entered will be displayed in the **Value to Convert** box and pounds will be selected in the **To** box. Choose the measurement of the number you entered (e.g. kilograms) and click **Convert**. The amount you entered converted to pounds will be displayed in the gross weight box.

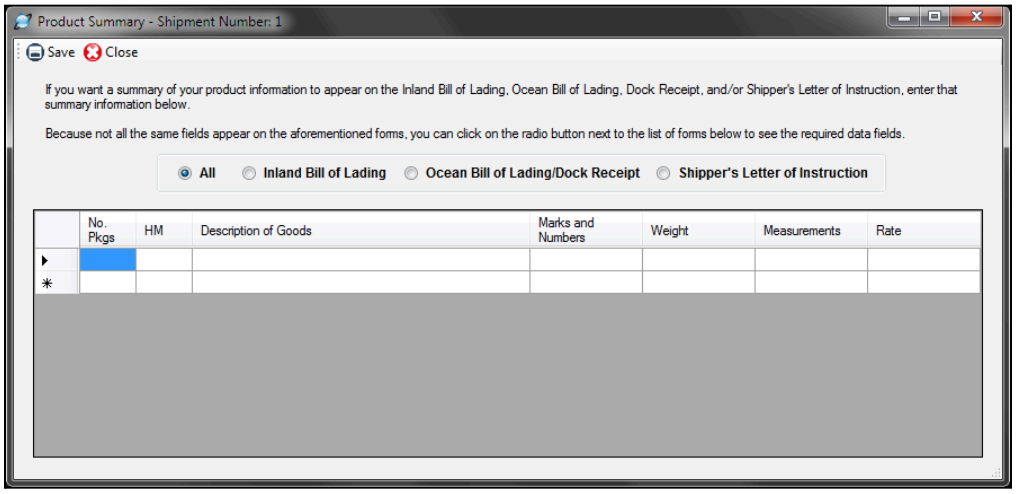
Cubic Meters
Enter the cubic measurement of the outer packages.

Marks and Numbers
Enter the markings and numbers used on the packages.

General Description of Goods
Enter a general description of the contents of the packages.

Signature
If you have assigned a signature to the profile used for this shipment, the signature file will be filled in here. However, you can choose a different signature from the drop-down list or choose **No Signature** for your Caricom invoice.

When you have filled in all the Caricom invoice fields, click **Save** and then **Close**. You can print the Caricom Invoice on the **Preview/Print/Email** screen.



Product Summary Screen

Because freight forwarders and carriers don't need to know the line-item-by-line-item details of the products you are shipping, this screen gives you the opportunity to enter a summary of your products. The summary information you enter on this screen will appear in the product sections of the Shipper's Letter of Instruction, Inland Bill of Lading, Ocean Bill of Lading, and Dock Receipt if you choose the option in the **Preview/Print/Email** screen that says "(with Product Summary)." If you want to print the line item details of your products on your documents, you do not need to complete this screen.

If you only want summary information on some of the forms, you can click the radio button to see which fields are required for the form that you want, so you only fill in the information that's needed.

No. Pkgs
Enter the total number of packages in this shipment. This field is used on all four forms.

HM
Mark with an "X" if this shipment includes Hazardous Materials. This field appears on the inland bill of lading, the ocean bill of lading and the dock receipt.

Description of Goods
Enter a general description of the products for each container/package. This field appears on all four forms.

Marks and Numbers
Enter any distinguishing information for your packages such as a container and seal number. This field appears on all four forms.

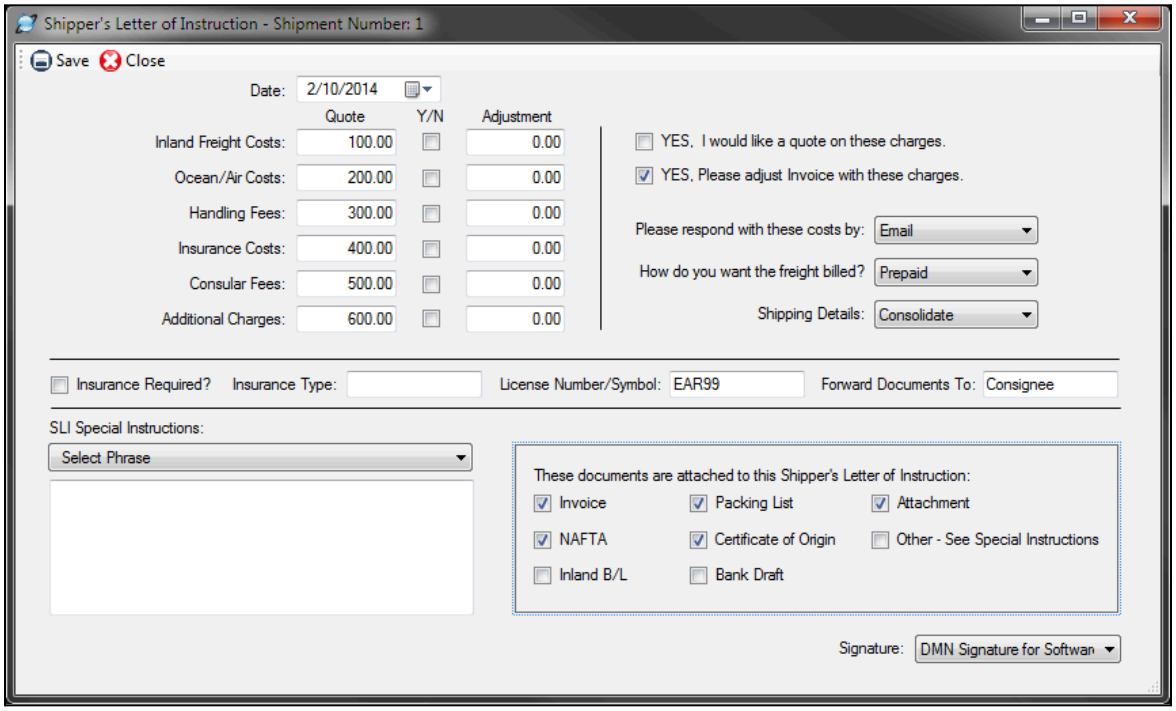
Weight
Enter the weight for each container/package. This field appears on all four forms.

Measurements
Enter the dimensions of each container/package. This field appears on the ocean bill of lading, dock receipt, and the shipper's letter of instruction.

Rate
Enter the rate that should appear on the inland bill of lading. The field appears only on the inland bill of lading.

When you have filled in all the **Product Summary** fields, click **Save** and then **Close**.

The Shipper's Letter of Instruction (SLI) Screen in EZ Start



Shipper's Letter of Instruction Screen

Fill out the data on this screen to complete the Shipper's Letter of Instruction (with Product Detail and Product Summary) to present to your freight forwarder along with your other export documents. Please review the instructions at the bottom of this section if you wish to produce a Shipper's Letter of Instruction (in SED format).

Date

Enter the date you want to appear on the Shipper's Letter of Instruction. This date is also used on the Commercial Invoice, Canada Customs Invoice, and Caricom Invoice. If you have already entered an invoice date on the Invoices screen, Canada Customs Invoice screen, or the Caricom Invoice screen in EZ Start, the date will automatically appear on this screen too.

Quote, Y/N and Adjustment fields for costs and fees

Enter any additional transportation fees that your freight forwarder quoted you and if you wish to add these fees to the invoice.

YES…check boxes

Check the first box if you want your freight forwarder to provide you with a quotation for the costs of a variety of different services. If you would like your freight forwarder to add these costs to the invoice, check the second box.

Please respond with these costs by

Choose how you want your freight forwarder to quote you with these additional charges: phone, fax or email.

How Do You Want the Freight Billed

Select either prepaid or collect.

Shipping Details
Choose if you wish to have the freight forwarder consolidate your shipment with other shipments to reduce freight costs or ship them directly to speed up the process.

Insurance
Check the **Insurance Required?** box if you would like the forwarder to insure your shipment and enter the type of insurance in the **Insurance Type** field.

License Number/Symbol
If you are shipping a product that requires a special export license, enter that information here. If not, enter NLR (No Licensed Required).

Forward Documents To
Enter the parties to receive a set of your shipping documents.

SLI Special Instructions
Enter any special instructions you would like to appear on the Shipper's Letter of Instruction (SLI). Shipping Solutions includes a database for storing commonly used instructions and phrases that your company uses, so you don't have to retype these instructions on every shipment. Click on the drop-down menu to see a list of phrases you've already entered into the database. You can add additional phrases by going to the **Databases** tab and clicking on **Phrases**. This field will display up to approximately 750 characters.

These documents are attached…check boxes
Click on the box next to the export forms you are providing your freight forwarder along with the SLI.

Signature
If you have assigned a signature to the profile used for this shipment, the signature file will be filled in here. However, you can choose a different signature from the drop-down list or choose **No Signature** for your SLI.

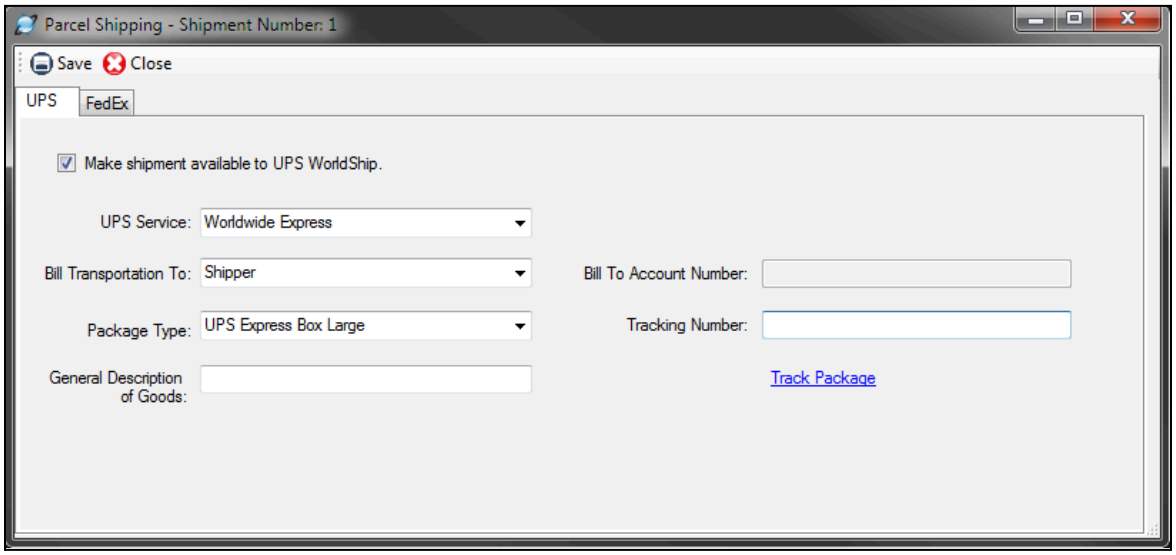
When you have filled in all the SLI fields, click **Save** and then **Close**. You can print the SLI with product summary or product detail from the **Preview/Print/Email** screen.

Parcel Shipping Screen (Professional Only)

Shipping Solutions Professional allows you to transfer your shipment data to either the UPS WorldShip software and/or the FedEx Ship Manager software so you can create shipping labels without having to retype the information. Once you've submitted the data to UPS or FedEx, you can also track your shipments from within the Shipping Solutions Professional software.

To use this feature, you first need to set up the connection between Shipping Solutions and the UPS WorldShip and/or FedEx Ship Manager depending on which parcel shipping options you use. The Parcel Shipping screen includes two tabs—one for UPS and one for FedEx. Click on the tab you wish to use for this shipment.

The UPS Tab on the Parcel Shipping Screen in EZ Start



Setting Up the UPS Connection

Begin by copying the data map files included with the Shipping Solutions Professional software to the appropriate folder located on the computer on which you are running UPS WorldShip. If you have installed Shipping Solutions in the default installation location, navigate to **C:\ProgramData\InterMart\SSProfessional_9\miscdata\ship\UPS** on the computer running Shipping Solutions. Copy all four of the files located in this folder.

Now navigate to the UPS WorldShip folder **C:\ProgramData\UPS\WSTD\ImpExp\Shipment** on the computer running the WorldShip software. Paste the four files you copied into this folder. If UPS WorldShip was installed on a server, even if you are accessing the program from your desktop computer, the WorldShip folder will reside on that server.

Next, you must establish an ODBC connection between the Shipping Solutions database and UPS WorldShip. On the computer hosting UPS WorldShip, open the **Control Panel**. Depending on which version of Windows you are using, you may be able to click on **Administrative Tools**; if not search for **ODBC** in the search box located in the upper-right corner of this screen.

From here you'll find an option called **Data Sources (ODBC)** or **Set up Data Sources (ODBC).** Double-click on this option. If you are given a choice between a 32-bit and 64-bit version, choose the 32-bit version. This will open an **ODBC Data Source Administrator** window. Click the **System DNS** tab, click **Add**, choose **SQL Server** and click **Finish**. In the **Name** box type **ShippingSolutionsRemote**. You must use this name for the connection to work. The Description is optional. You may want to use it to describe this as the UPS connection. Type your SQL Server name in the **Server** box or choose it from the drop-down list.

If you don't know the name of your SQL Server, you can find it in Shipping Solutions on the **Admin** tab=> **Set Database Connection** screen. Now click **Next**. Choose either Windows authentication or SQL Server authentication. Using SQL Server authentication will require a user name and password. On the **Admin** tab=>**Set Database Connection** screen in Shipping Solutions, if you have the trusted connection box checked you can probably use Windows authentication for this as well. Click **Next**. Change the default database, if needed. The default Shipping Solutions database is **ssdata_sql_01**. Click **Next** and **Finish**. Then click **Test Data Source**. When the test completes successfully click **OK** until you have exited all the setup screens.

Open **UPS WorldShip**. Click the **Import-Export** tab. Click **Automatic Export** and then **Export After Shipment Processing**. Choose **Multiple Maps**. Click the check box next to the two Shipping Solutions maps (**SSPro Header Only Export** and **SSPro Header and Shipment Export**) and then click the **Export** button. This will allow UPS WorldShip to send the tracking number back to Shipping Solutions when you process a shipment. The maps will not be visible until the ODBC connection is properly configured.

Sending Shipment Data to UPS WorldShip

You are now ready to start using the Parcel Shipping feature in Shipping Solutions, and you will not need to complete the steps above again. The steps below need to be completed for each UPS shipment.

Prepare your shipment in Shipping Solutions as you normally would. To make it available to UPS WorldShip, click on the **EZ Start** tab and click **Parcel Shipping**. Click the **UPS** tab. Click the check box that says **Make shipment available to UPS WorldShip**. Select the **UPS Service** and **Package Type**. Choose who to bill the transportation cost to. If it is someone other than the shipper, enter the UPS account number. Enter a general **Description of Goods**. **Save** and **Close** the screen.

Open UPS WorldShip. Click the **Import-Export** tab and then **Batch Import**. Choose the proper profile. If you have created a Packing List for this shipment in Shipping Solutions, choose the **SSPro Header and Shipment Import** map. Otherwise, choose the **SSPro Header Only Import** map. UPS will then tell you how many shipments are ready to import. Click **Next** and **Save**.

To see your imported shipments, click **Home** and then **History**. Expand the **Imported Shipments** and shipper number trees. Click on the shipment you want to work on and click **Edit/Reconcile**. Fill in any missing information. When you click **Process Shipment**, the tracking number will be sent back to the Parcel Shipping screen in Shipping Solutions.

Please Note: If you are sending a multi-package shipment, WorldShip will only send the first tracking number back to Shipping Solutions. You will need to manually copy and paste any additional tracking numbers you want to keep in Shipping Solutions.

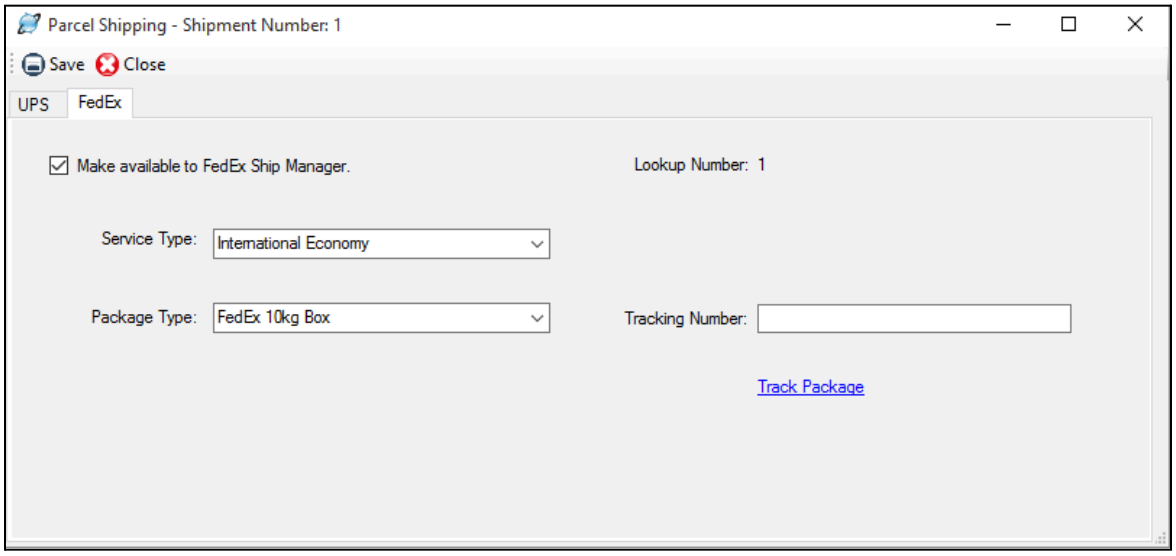
If UPS WorldShip says there are no records to import, go back to Shipping Solutions and make sure the **Make shipment available to UPS WorldShip** box is checked. Also, make sure there is no tracking number shown on the Parcel Shipping screen. Shipments with tracking numbers in Shipping Solutions will not be visible to UPS WorldShip to avoid duplicate shipments.

Another reason UPS WorldShip may not be able to find your shipment is if you have chosen the wrong map. If you have clicked the **Add New Package** button on the EZ Start-Packing List screen, you must use the **SSPro Header and Shipment Import** map. If not, you must use the **SSPro Header Only Import** map.

ODBC Connection to Cloud Database

If you are using a cloud database hosted by Shipping Solutions, contact us for instructions for setting up the ODBC connection.

The FedEx Tab on the Parcel Shipping Screen in EZ Start



Setting Up the FedEx Connection

Begin by copying the data profile files included with the Shipping Solutions Professional software to the appropriate folder located on the computer on which you are running FedEx Ship Manager. If you have installed Shipping Solutions in the default installation location, navigate to **C:\ProgramData\InterMart\SSProfessional_9\miscdata\ship\FedEx** on the computer running Shipping Solutions. Copy both files located in this folder.

Now navigate to the **C:\ProgramData\FedEx\Integration\Profiles** folder on the computer running the Ship Manager software. Paste the two files you copied into this folder.

Next, you must establish an ODBC connection between the Shipping Solutions database and FedEx Ship Manager. On the computer hosting Ship Manager open the **Control Panel**. Depending on which version of Windows you are using, you may be able to click on **Administrative Tools**; if not search for **ODBC** in the search box located in the upper-right corner of this screen.

From here you'll find an option called **Data Sources (ODBC)** or **Set up Data Sources (ODBC).** Double-click on this option. If you are given a choice between a 32-bit and 64-bit version, click on the 32-bit version. This will open an **ODBC Data Source Administrator** window. Click the **System DNS** tab, click **Add**, choose **SQL Server** and click **Finish**. In the **Name** box type **SSExportRemote**. You must use this name for the connection to work. The Description is optional. You may want to use it to describe this as the FedEx connection. Type your SQL Server name in the **Server** box or choose it from the drop-down list.

If you don't know the name of your SQL Server, you can find it in Shipping Solutions on the **Admin** tab=> **Set Database Connection** screen. Now click **Next**. Choose either Windows authentication or SQL Server authentication. Using SQL Server authentication will require a user name and password. On the **Admin** tab =>**Set Database Connection** screen in Shipping Solutions, if you have the trusted connection box checked you can probably use Windows authentication for this as well. Click **Next**. Change the default database, if needed. The default Shipping Solutions database is **ssdata_sql_01**. Click **Next** and **Finish**. Then click **Test Data Source**. When the test completes successfully click **OK** until you have exited all the setup screens.

Sending Shipment Data to FedEx Ship Manager

You are now ready to start using the Parcel Shipping feature in Shipping Solutions, and you will not need to complete the steps above again. The steps below need to be completed for each FedEx shipment.

Prepare your shipment in Shipping Solutions as you normally would. To make it available to FedEx Ship Manager, click on the **EZ Start** tab and click **Parcel Shipping**. Click the **FedEx** tab. Click the check box that says **Make shipment available to FedEx Ship Manager**. Select the **Service Type** and **Package Type**. These fields are optional. Make note of the **Lookup Number**. You will need to know this to pull the correct shipment into FedEx Ship Manager. **Save** and **Close** the screen.

Open FedEx Ship Manager. Click **Integration**. Choose the proper profile. If you have created a Packing List for this shipment in Shipping Solutions, choose **SSProHeaderPackageImportExport**. Otherwise, choose **SSProHeaderOnlyImportExport**. The program will now prompt you for the **Lookup Value**. (If the Lookup Value box does not pop up, click **Integration**, choose **None**, and then click **Integration** again and select the proper profile). Enter the number from the Parcel Shipping screen in Shipping Solutions. The appropriate data will be pulled from Shipping Solutions into FedEx Ship Manager. Review your shipment and complete any missing information. When you click **Ship**, the tracking number will be sent back to Shipping Solutions and stored on the Parcel Shipping screen.

Please Note: If you are sending a multi-package shipment, Ship Manager will only send the first tracking number back to Shipping Solutions. You will need to manually copy and paste any additional tracking numbers you want to keep in Shipping Solutions.

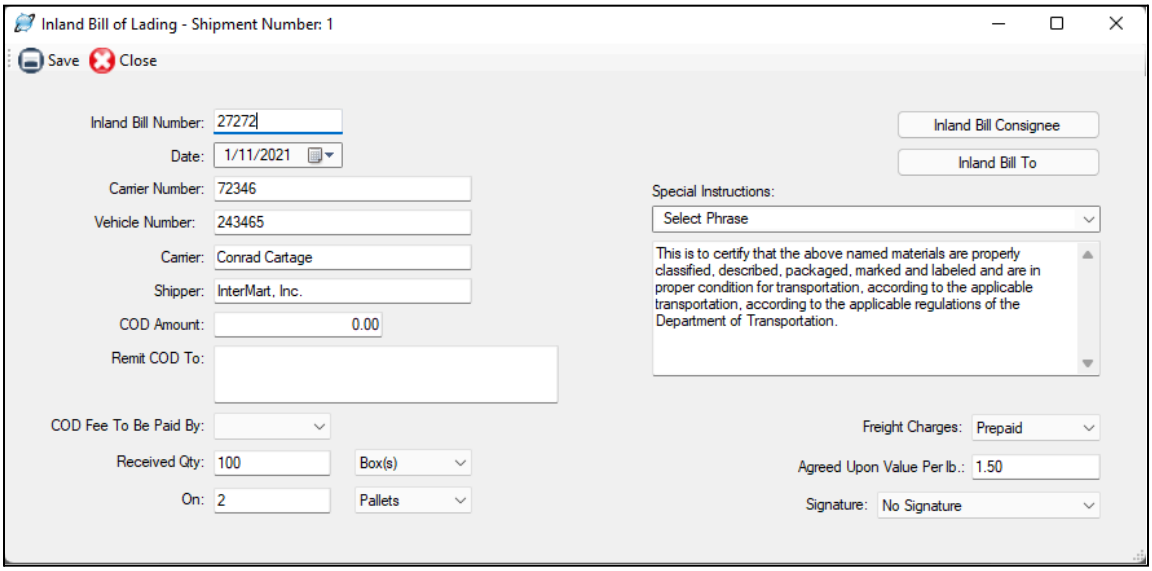
If FedEx Ship Manager says it cannot find your lookup number, go back to Shipping Solutions and make sure the **Make shipment available to FedEx Ship Manager** box is checked. Also, make sure there is no tracking number shown on the Parcel Shipping screen. Shipments with tracking numbers in Shipping Solutions will not be visible to FedEx Ship Manager to avoid duplicate shipments.

Another reason FedEx Ship Manager may not be able to find your shipment is if you have chosen the wrong profile. If you have clicked the **Add New Package** button on the EZ Start-Packing List screen, you must use the **SSProHeaderPackageImportExport** profile. If not, you must use the **SSProHeaderOnlyImportExport** profile.

ODBC Connection to Cloud Database

If you are using a cloud database hosted by Shipping Solutions, contact us for instructions for setting up the ODBC connection.

The Inland Bill of Lading Screen in EZ Start



Inland Bill of Lading Screen

Enter the information on this screen to complete an inland bill of lading for transporting your goods to a port of export. Before you use this bill of lading format (or any bill of lading format), we recommend that you negotiate a transportation contract with your motor carriers.

Inland Bill Number
Enter your inland bill of lading number.

Date
Enter the date the goods leave your facility.

Carrier Number
Enter the license number of the carrier.

Vehicle Number
Enter the number of the vehicle used to transport your goods to the port of export.

Carrier
Enter the name of the firm transporting the goods to their port of export.

Shipper
Enter your company name.

COD Amount
If the carrier is to collect money from the consignee before the goods are to be transferred to the consignee, enter the amount that needs to be collected here.

Remit COD To
Enter the name and address of the company that should receive the COD amount collected.

COD Fee To Be Paid By
Select who, if anyone, should be paying the COD amount.

Received Qty and On
Enter the number and types of packages that will be picked up by the carrier and how they are prepared for shipment. For example, you may have 50 boxes on 2 pallets. Choose the types of packaging from the drop-down menu. You can add additional types of packaging in the **Miscellaneous Lists Database** described here.

Inland Bill Consignee
Select the Consignee for the first leg of your shipment. Since most companies use Shipping Solutions to complete their export documents, the consignee of an inland bill of lading is usually the first delivery point where the international carrier receives the merchandise to transport internationally. Enter the name and address of that company here. To add, click the **Inland Bill Consignee** button. You can type the name and address here or click **Add Contact from Database**. The **Select Database** field defaults to the **Miscellaneous** database, but you can choose a contact from any database by choosing the database from the **Select Database** drop-down list. To search for a particular contact, choose **Starts With** or **Contains** from the **Match** drop-down list and start typing the contact's company name in the **Search for Company** box. Click on the contact you want and click **Add Contact**. Click **Save** and **Close**.

Inland Bill To
Enter the billing address here if it is different from the shipping address. To add click the **Inland Bill To** button. You can type the name and address here or click **Add Contact from Database** and follow the process described under **Inland Bill Consignee**.

Special Instructions
Enter any special instructions that need to appear on the inland bill of lading. Shipping Solutions includes a database for storing commonly used instructions and phrases that your company uses, so you don't have to retype these instructions on every shipment. Click on the drop-down menu to see a list of phrases you've already entered into the database. You can add additional phrases by going to the **Databases** tab and clicking on **Phrases**. This field allows you to display up to approximately 750 characters.

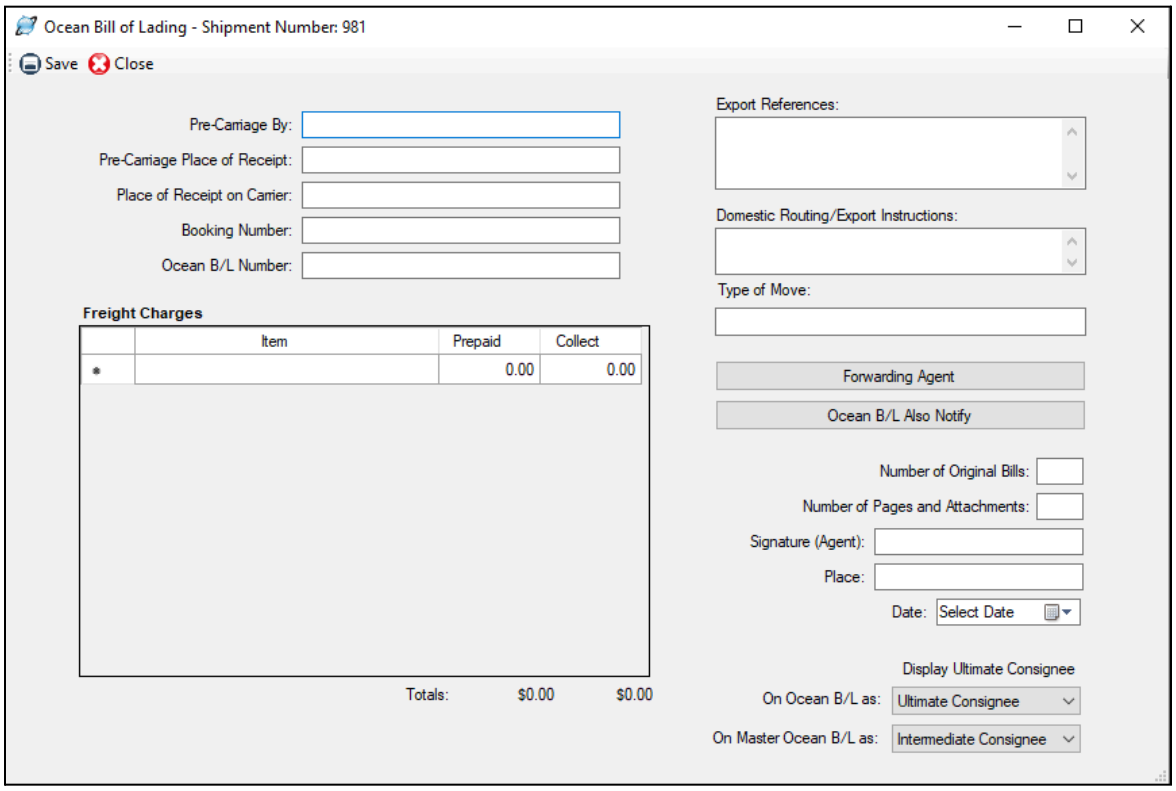
Freight Charges
Indicate the party responsible for the inland freight charges by selecting from the drop-down list.

Agreed Upon Value Per lb.
Enter the maximum value per pound of your merchandise as negotiated with your carrier.

Signature
If you have assigned a signature to the profile used for this shipment, the signature file will be filled in here. However, you can choose a different signature from the drop-down list or choose **No Signature** for your inland bill of lading.

When you have filled in all the inland bill of lading fields, click **Save** and then **Close**. You have two options for printing the Inland Bill of Lading on the **Preview/Print/Email** screen. The first option, Inland Bill of Lading (with Product Detail), pulls the product information from the **EZ Start Product Detail** screen with line item-by-line item detail. The second printing option, Inland Bill of Lading (with Product Summary), pulls the product information from the **EZ Start Product Summary** screen, which provides a summary of your products.

The Ocean Bill of Lading/Dock Receipt Screen in EZ Start



Ocean Bill of Lading/Dock Receipt Screen

Complete the information on this screen to complete an ocean bill of lading and/or dock receipt.

Pre-Carriage By
Enter the name of the carrier who transported the goods to the port of export.

Pre-Carriage Place of Receipt
Enter the place where the pre-carrier received the goods.

Place of Receipt on Carrier
Enter the location where a consignment (shipment) is delivered to the consignee; the place where the carrier's liability ends for the transport venture.

Booking Number
Enter the booking number assigned to your shipment.

Ocean B/L Number
Enter the ocean bill of lading number for your shipment.

Freight Charges
Enter any additional charges for this shipment that have either been prepaid or must be collected.

Export References
Enter any reference numbers assigned to this shipment.

Domestic Routing/Export Instructions
Enter a description of how a shipment will be moved between consignor and consignee or between place of acceptance by the carrier and place of delivery to the consignee.

Type of Move
Enter the method of transportation by which the merchandise is exported.

Forwarding Agent
Enter the contact information for the forwarding agent for this shipment. To add, click the **Forwarding Agent** button. You can type the name and address here or click **Add Contact from Database**. The **Select Database** field defaults to the **Miscellaneous** database, but you can choose a contact from any database by choosing the database from the **Select Database** drop-down list. To search for a particular contact, choose **Starts With** or **Contains** from the **Match** drop-down list and start typing the contact's company name in the **Search for Company** box. Click on the contact you want and click **Add Contact**. Click **Save** and **Close**.

Ocean B/L Also Notify
Enter the contact information of any additional parties that should be notified when the goods reach the port of destination. To add, click the **Ocean B/L Also Notify** button. You can type the name and address here or click **Add Contact from Database**. The **Select Database** field defaults to the **Miscellaneous** database, but you can choose a contact from any database by choosing the database from the **Select Database** drop-down list. To search for a particular contact, choose **Starts With** or **Contains** from the **Match** drop-down list and start typing the contact's company name in the **Search for Company** box. Click on the contact you want and click **Add Contact**. Click **Save** and **Close**.

Number of Original Bills
Indicate the number of original bills of lading you will be presenting with the shipment.

Number of Pages and Attachments
Enter the number of pages that accompany the completed ocean bill of lading. You may need to preview the form to see the total number of pages.

Signature (Agent)
If you are not going to sign the paper form, you can type in the name of the signatory here.

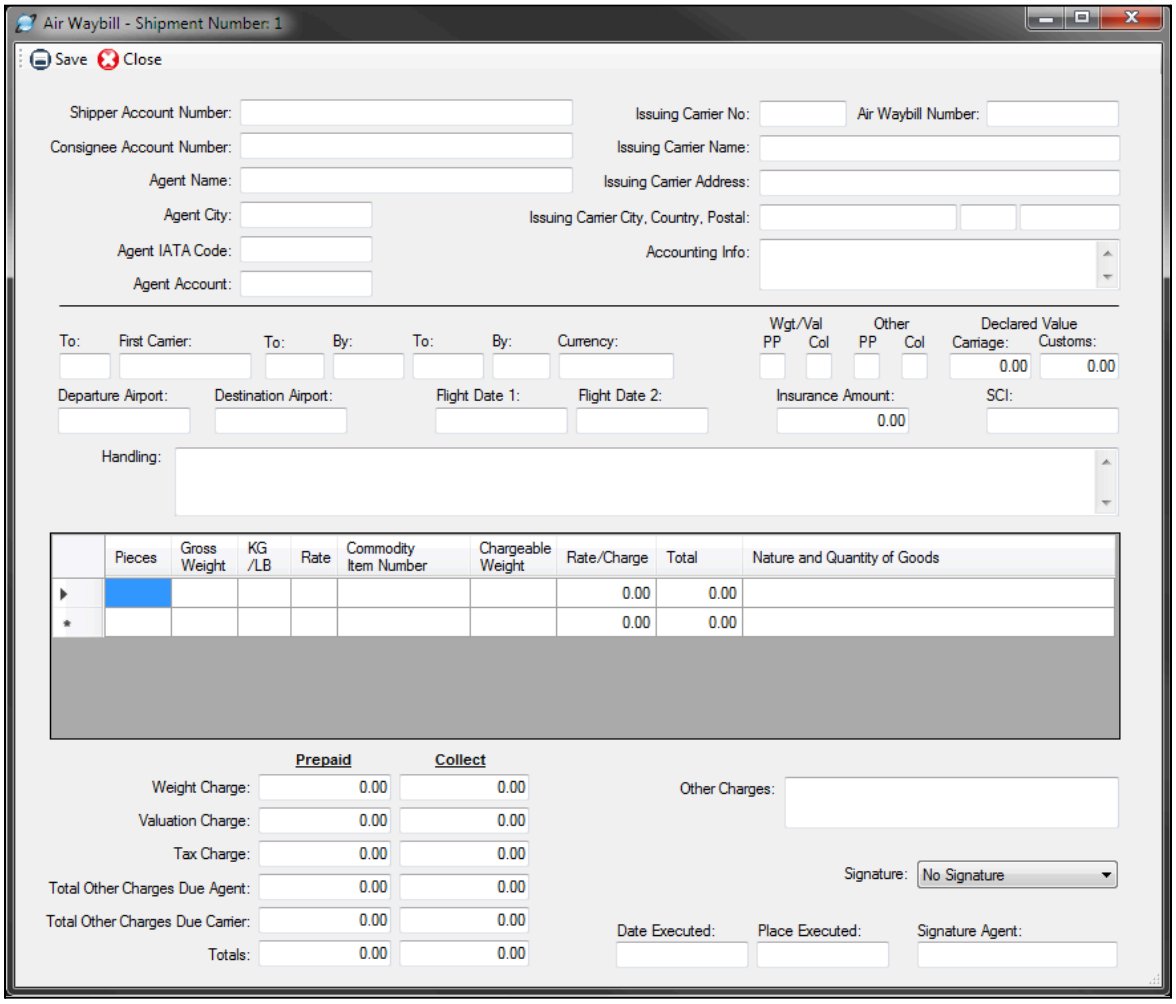
Place
Enter the location where the ocean bill of lading is signed.

Date
Enter the date when the ocean bill of lading is signed.

Display Ultimate Consignee
This option lets you choose who appears as the ultimate consignee on the Ocean Bill of Lading and the Master Ocean Bill of Lading. You can choose either the Ultimate Consignee or the Intermediate Consignee that you entered on the Contacts screen (see here). By default, Shipping Solutions will use the Ultimate Consignee on the Ocean Bill of Lading and the Intermediate Consignee on the Master Ocean Bill of Lading. The difference between the two versions reflects the differences between how a standard and master ocean bill of lading are typically used.

When you have filled in all the ocean bill of lading fields, click **Save** and then **Close**. There are several options for printing the Ocean Bill of Lading and the Dock Receipt on the **Preview/Print/Email** screen. For a description of all the export forms, you'll find the **Summary of Export Documents** in the Appendix beginning here.

The Air Waybill Screen in EZ Start



Air Waybill Screen

Enter information on this screen to complete an air waybill.

Shipper Account Number
Enter your company's account number only if required by the carrier.

Consignee Account Number
Enter the consignee's (receiver's) Precise Account Locator (PAL) Number, if applicable.

Agent Information
Enter the name, city, IATA code and account number for the carrier's agent.

Account Number (3 digit)
Enter the carrier's three-digit account number.

Issuing Carrier Information
Enter the number, name, and address of the air carrier.

Air Waybill Number
Enter the waybill number for this shipment that was provided by the carrier. This field is shared with the Dangerous Goods—Lithium Battery Declaration screen. If you enter an Air Waybill Number on that screen, it will automatically appear on this screen, and vice versa.

Accounting Info
Enter the accounting information required by your carrier, if any.

To (by First Carrier)
Enter the IATA three-letter code of the airport of destination or the first transfer point of the goods.

First Carrier
Enter either the full name or the IATA two-character code of the first carrier.

To (by Second Carrier)
Enter the IATA three-letter code of the airport of destination or the second transfer point.

By (Second Carrier)
Enter the IATA two-character code of the second airline.

To (by Third Carrier)
Enter the IATA three-letter code of the airport of destination or the third transfer point.

By (Third Carrier)
Enter the IATA two-character code of the third airline.

Currency
Enter the ISO three-letter currency code of the currency applicable in the country of departure (e.g. USD).

Wgt/Val PP and Col
Enter an “X” in the “PP” box if the Weight/Valuation charges are wholly prepaid; enter an “X” in the “Col” box if the charges are wholly collect.

Other PP and Col
Enter an “X” in the “PP” box if the other charges (see below) are wholly prepaid; enter an “X” in the “Col” box if the other charges are wholly collect.

Declared Value for Carriage
Enter in the declared value for carriage. When no value is declared, enter “NVD”.

Declared Value for Customs
Enter the value of the shipment for customs purposes, which may be “NCV,” or leave the box blank.

Departure Airport
Enter the three-digit code for the airport of departure for the first carrier of the goods.

Destination Airport
Enter the airport of destination for the last carrier of the goods.

Flight Date 1 and 2
Enter the requested date(s) of departure.

Insurance Amount
If the issuing carrier offers insurance, enter the amount to be insured. If the shipper doesn't request any insurance, enter "XXX".

SCI
When a consignment is loaded or reloaded at an airport in a European Union country that is to be unloaded or reloaded in an airport in another European Union country, enter the Customs Origin Code.

Handling
Enter only clear and concise information as required by the carrier.

Pieces
Enter the number of pieces for the applicable rating entry.

Gross Weight
Enter the gross weight of the pieces for the applicable rating entry.

KG/LB
Enter "K" or "L" for the unit of weight used.

Rate
Enter one of the following codes for the Rate Class:

M—minimum charge
N—normal rate
Q—quantity rate
B—basic charge (optional use)
K—rate per kilogram (optional use)
C—specific commodity rate
R—class rate reduction
S—class rate surcharge
U—unit load device basic charge or rate
E—unit load device additional rate
X—unit load device additional information
Y—unit load device discount
W—weight increase

Commodity Item Number
Enter the appropriate IATA item description number.

Chargeable Weight
Enter the chargeable weight calculated according to the applicable rating rules.

Rate/Charge
Enter the total charge or discount for each line entry.

Total
Enter the total charge or discount for each line entry.

Nature and Quantity of Goods
Enter the description of the goods.

Prepaid and Collect Charges
Enter the prepaid and collect charges due the identified parties, if any.

Other Charges
Enter any other charges incurred at origin as either wholly prepaid or wholly collect.

Signature
This is the signature of the shipper or its agent. If you have assigned a signature to the profile used for this shipment, the signature file will be filled in here. However, you can choose a different signature from the drop-down list or choose **No Signature** for your air waybill.

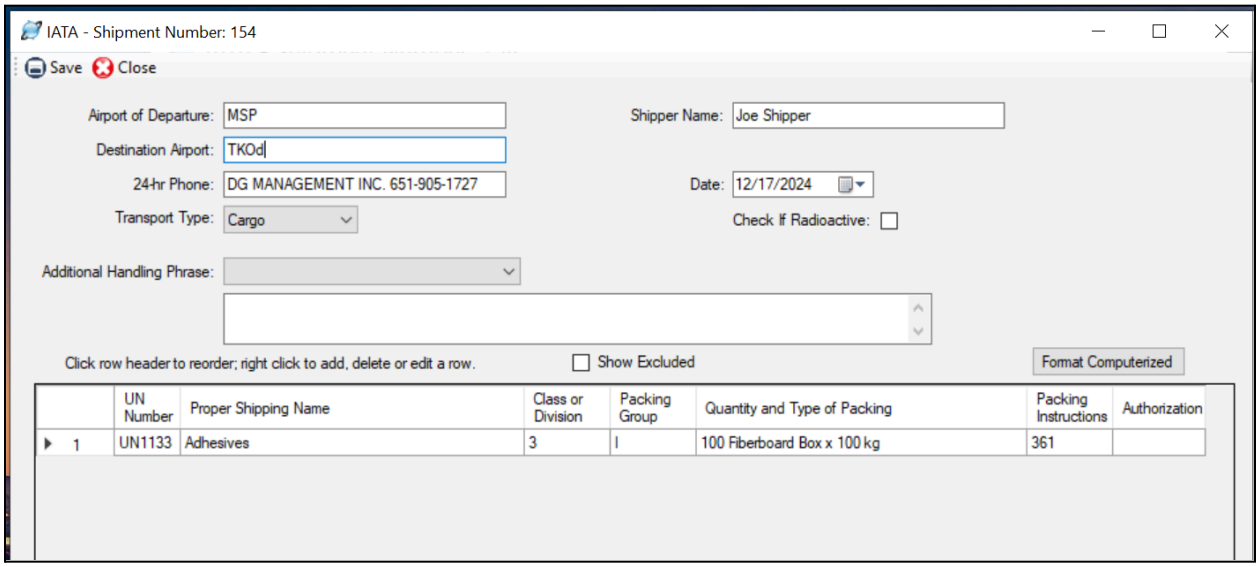
Date Executed
Enter the date the air waybill was executed in the sequence of day, month and year. Please Note: The month should be expressed alphabetically, either abbreviated or in full.

Place Executed
Enter the name of the place (airport or city) where the air waybill was executed.

Signature Agent
If the issuing carrier or its agent is not going to sign the air waybill, you can type the name here.

When you have filled in all the air waybill fields, click **Save** and then **Close**. You have several options for printing the Air Waybill on the **Preview/Print/Email** screen. For a description of all the export forms, you'll find the **Summary of Export Documents** in the Appendix beginning here.

The IATA Dangerous Goods Screen in EZ Start



Dangerous Goods IATA Screen (Professional Only)

Complete the fields on this screen to enter information on the IATA Dangerous Goods form.

Airport of Departure
Enter the full name of the airport or city of departure (if known). This field is optional.

Destination Airport
Enter the full name of the airport or city of destination (if known). This field is optional.

24-Hour Phone
For shipments to, from or within the U.S., enter a phone number (including area code and international access codes for numbers outside the U.S.) that is monitored at all times while hazardous material is in transport, including storage incident to transport.

Transport Type
Select whether your shipment will comply with limitations for Passenger and Cargo Aircraft or the Limitations for Cargo Aircraft Only.

Shipper Name
Enter the name of the person signing the declaration.

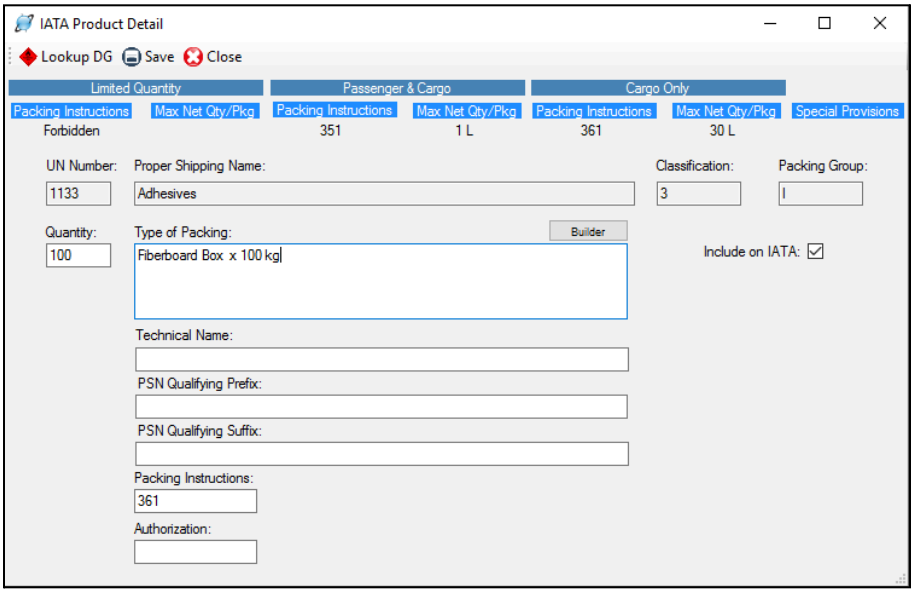
Date
Enter the date of signing the declaration.

Check if Radioactive
Check this box if the shipment contains radioactive material. Radioactive material must not be included on the same declaration form with other dangerous goods except dry ice when used as a refrigerant.

Additional Handling
Enter additional specific handling information or statements that may be required. You can choose saved phrases from the drop-down list or type handling instructions directly into the box.

Your dangerous goods items will be listed in the grid in the lower section of the screen and will include products from the **EZ Start-Product Detail** screen along with any sub-products. Re-order the items by clicking in the first column. Right click to edit or add an item, which will take you to the **IATA Product Detail** screen.

The IATA Product Detail Screen for Adding or Editing Products

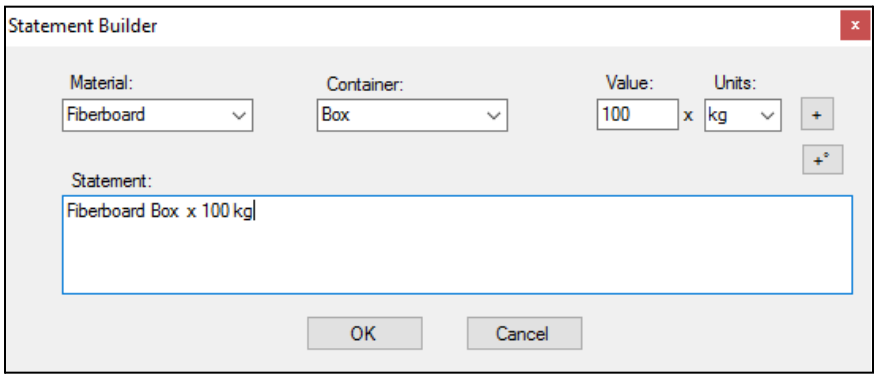


The **IATA Product Detail** screen first shows you information from the IATA Database of Dangerous Goods including the packing instructions and maximum net quantity per package for limited quantities, passenger and cargo planes, and cargo planes only. Special provisions from the IATA Database of Dangerous Goods are also displayed.

If you have already stored your DG information in the **Products** database (see here), it will automatically populate on this screen when you add the product to your shipment. If you are adding a new item, click **Lookup DG** to search for your item in the IATA Database of Dangerous Goods. You can search the database by UN Number or Proper Shipping Name. The IATA Database will provide the **UN Number**, **Proper Shipping Name**, **Classification**, and **Packing Group**.

Enter the **Quantity**. Since this could be different from the commercial invoice quantity, it is not copied from the Invoices tab.

The IATA Statement Builder Screen



Type directly in the **Type of Packing** box or click the **Builder** button for help in entering your packing information. On the **Statement Builder** screen, choose your **Material** and **Container** from the drop-down lists. Enter the amount in the containers in the **Value** box and either L for liters or kg for kilograms from the **Units** drop-down list. Click the plus button to add the **Value** and **Units** to your type of material and container in the **Statement** box. Use the degree button to add that symbol to a flashpoint, if needed. You can also use this box, if needed, to describe an overpack. Click **OK** to return to the DG tab.

If your DG item requires a technical name following the **Proper Shipping Name**, enter it in the **Technical Name** box. Do not include the required parenthesis because Shipping Solutions will automatically add them.

The **Include on IATA** check box will default to checked. If for some reason you do not want to include this item on your Dangerous Goods IATA document, uncheck the box.

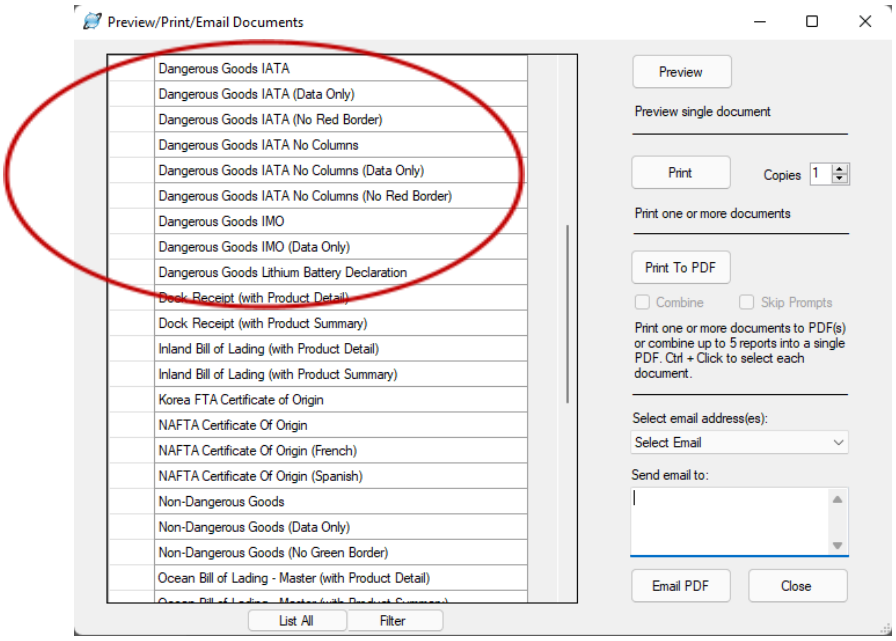
Some items require words in front of or following the **Proper Shipping Name** (PSN). For example, WASTE must precede your PSN if the DG item is being transported for disposal, and "stabilized" must follow the PSN if the DG item must be stabilized for transport. There are many other possible prefixes and suffixes (See the IATA Dangerous Goods regulations 8.1.3 for more details). Any words that you want to precede or follow your PSN can be entered in the **PSN Qualifying Prefix** and **PSN Qualifying Suffix** box.

Packing Instructions can be taken from the information shown at the top of the screen. The **Authorization** box should include any Special Provisions shown at the top of the screen and any other needed information.

Click **Save** and **Close** to return to the IATA screen. There are two ways to display your items on the IATA documents. The first is in columns as shown in the grid on the IATA screen. The second is with double slashes between the fields with no columns shown. To get an idea of how your items will look in the non-columnar format, click the **Format Computerized** button. To return to the column view, click **Format Manual**.

If you have unchecked the **Include on IATA** box for some of your items, you can display all items by checking the **Show Excluded** box. This may be helpful in locating items that have been entered but seem to be missing.

The IATA Dangerous Goods Form Options



There are multiple Dangerous Goods IATA forms listed on the **EZ Start** screen, **Preview/Print/Email** button. The different versions display the data differently and vary what is printed. The product data on the forms will print in columns unless you choose one of the IATA options that include "No Columns" in the name. In that case, the product information will print with double slashes between the fields.

If you are printing the IATA form on a color printer, you can choose to print either the **Dangerous Goods IATA** or **Dangerous Goods IATA No Columns**, and the entire document will print including the required red border on the left- and right-side of the page. If you don't have a color printer, you can print either the columnar or non-columnar version of the form on paper that already has the red border (in which case choose one of the options marked **(No Red Border)**, or print the data on a pre-printed IATA form, in which case choose one of the options marked **(Data Only)**.

DISCLAIMER
Proper training is required under federal and/or state regulations to handle dangerous goods and/or hazardous materials. All persons and entities must comply with all federal regulations, including but not limited to the specific training requirements of 49 C.F.R. (172.000– 172.704).

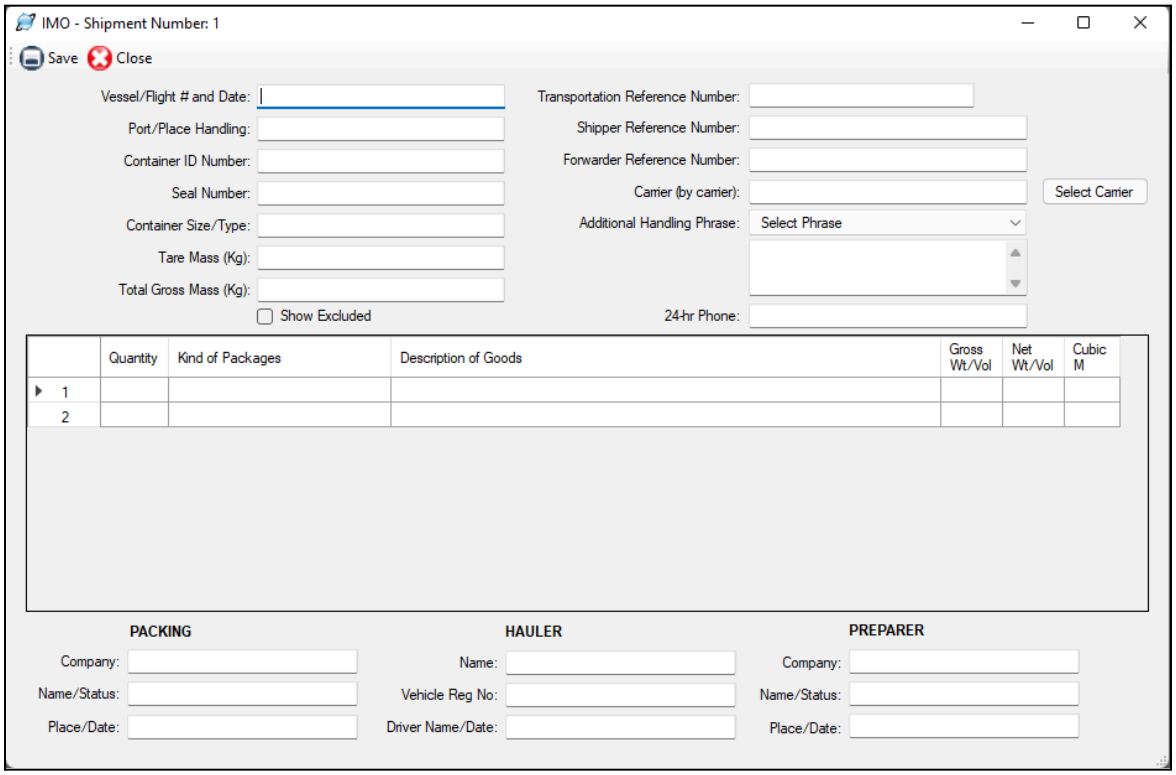
InterMart provides this form and instructions to assist properly trained shippers. The materials provided by Shipping Solutions in no way alter, satisfy or influence any federal or state requirements. The information provided does not meet the training requirements as required in DOT 49 CFR.

The study and/or use of Shipping Solutions software does not qualify an individual to prepare, package, transport or otherwise handle dangerous goods or hazardous materials.

The information contained in this document is subject to change or update due to changing government regulations. The user of this document assumes responsibility for complying with all applicable laws and regulations regarding the shipment of dangerous goods.

InterMart shall not be held responsible for any loss, injury and/or damage caused by errors, omissions, misprints or misrepresentations of the contents of this software, forms or documentation or for any unauthorized or inappropriate use.

The IMO Dangerous Goods Screen in EZ Start



Dangerous Goods IMO Screen (Professional Only)

Complete this screen to enter information on the IMO Dangerous Goods form.

Vessel/Flight# and Date
Enter the name of the vessel on which your shipment is loaded and the date of departure.

Port/Place of Handling
Enter the port in which your shipment was loaded on the vessel.

Container ID Number
Enter the ID number for your container(s).

Seal Number
Enter the seal number for your container(s).

Container Size/Type
Enter the size and type of container(s).

Tare Mass (Kg)
Enter the mass (or weight) of your empty container(s) including all fittings and appliances used in the container.

Total Gross Mass (Kg)
Enter the mass (or weight) of your container(s) packed with all your products.

Transportation Reference Number
Enter the waybill number for the shipment.

Shipper Reference Number
Enter the shipper's reference number.

Forwarder Reference Number
Enter the freight forwarder's reference number, if assigned.

Carrier (by carrier)
Enter the carrier of the goods or check the **Select Carrier** button to choose the carrier from the list of preloaded SCAC codes.

Additional Handling
Enter any additional handling instructions for your shipment. You can choose phrases from the Phrases Database by clicking on the drop-down list or type directly into the box.

24-hr Phone
For shipments to, from or within the U.S., enter a phone number (including area code and international access codes for numbers outside the U.S.) that is always monitored while hazardous material is in transport, including storage incident to transport.

PACKING
Enter the name of the company, person, status, place and date where your products were packed.

HAULER
Enter the name of the company, vehicle registration number, date and driver who hauled the goods to the airport of departure.

PREPARER
Enter the company, person and their status, place, and date where the IMO Dangerous Goods form was prepared.

Your dangerous goods items will be listed in the grid in the middle section of the screen and will include products from the **EZ Start-Product Detail** screen along with any sub-products. Reorder the items by clicking in the first column. Right click to edit or add an item, which will take you to the **IMO Product Detail** screen.

If you have already stored your DG information in the **Products** database (see here), it will automatically populate on the **IMO Product Detail** screen when you add the product to your shipment. If not, click **Lookup DG** to search for your item in the IATA Database of Dangerous Goods. You can search the database by **UN Number** or **Proper Shipping Name**. The IATA Database will provide the **UN Number**, **Proper Shipping Name**, **Classification** and **Packing Group**. The list of dangerous goods is slightly different for IMO than it is for IATA, so you may need to edit these for IMO shipments.

Enter the **Quantity**. Since this could be different from the commercial invoice quantity, it is not copied from the Invoices tab.

Type directly in the **Kind of Packages** box or click the **Builder** button for help in entering your packing information. On the **Statement Builder** screen, choose your **Material** and **Container** from the drop-down lists. Enter the amount in the containers in the **Value** box and either L for liters or kg for kilograms from the **Units** drop-down list. Click the plus button to add the **Value** and **Units** to your type of material and container in the **Statement** box. Use the degree button to add that symbol to a flashpoint, if needed.

Use the **Additional Description** box to enter any information that you want to follow the **UN Number**, **Proper Shipping Name**, **Classification** and **Packing Group**. This information could include a flashpoint, so a degree button is provided to add that symbol.

If your DG item requires a technical name following the **Proper Shipping Name**, enter it in the **Technical Name** box. Do not include the required parenthesis because Shipping Solutions will automatically add them.

The **Include on IMO** checkbox will default to checked. If for some reason you do not want to include this item on your Dangerous Goods IMO document, uncheck the box.

The Dangerous Goods IMO document shows **Gross Weight/Volume** and either **Net Weight/Volume** or **Cubic Meters**, and you can enter the values here. Click **Save** and **Close** to return to the IMO screen.

If you have unchecked the **Include on IMO** box for some of your items, you can display all items by checking the **Show Excluded** box. This may be helpful in locating items that have been entered but seem to be missing.

There are multiple Dangerous Goods IMO documents listed on the **EZ Start** screen, **Preview/Print/Email** button. You can print the whole document (no designation) or you can print just the data on a preprinted form (designated as **Data Only**).

DISCLAIMER

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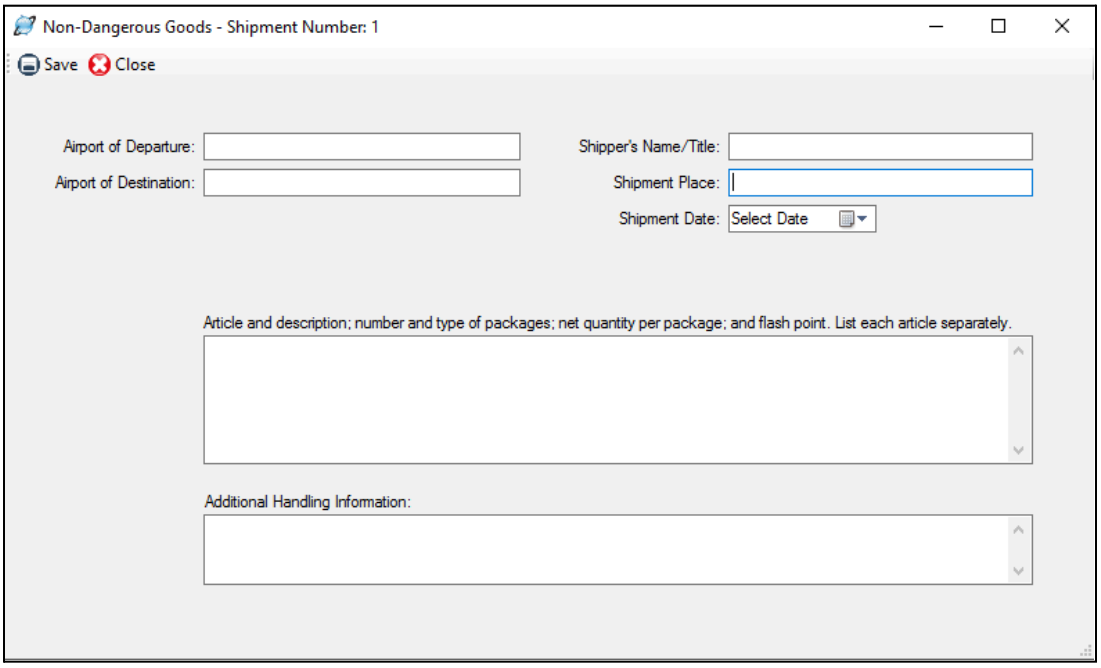
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The information contained in this document is subject to change or update due to changing government regulations. The user of this document assumes responsibility for complying with all applicable laws and regulations regarding the shipment of dangerous goods.

InterMart shall not be held responsible for any loss, injury and/or damage caused by errors, omissions, misprints or misrepresentations of the contents of this software, forms or documentation or for any unauthorized or inappropriate use.

The Non-Dangerous Goods Screen in EZ Start



Non-Dangerous Goods Screen (Professional Only)

Complete this screen to enter information on the Shipper's Declaration of Goods Not Restricted.

Airport of Departure
Enter the full name of the airport or city of departure (if known). This field is optional.

Airport of Destination
Enter the full name of the airport or city of destination (if known). This field is optional.

Shipper's Name/Title
Enter the name and title of the person signing the declaration.

Shipment Place
Enter the place where signing the declaration.

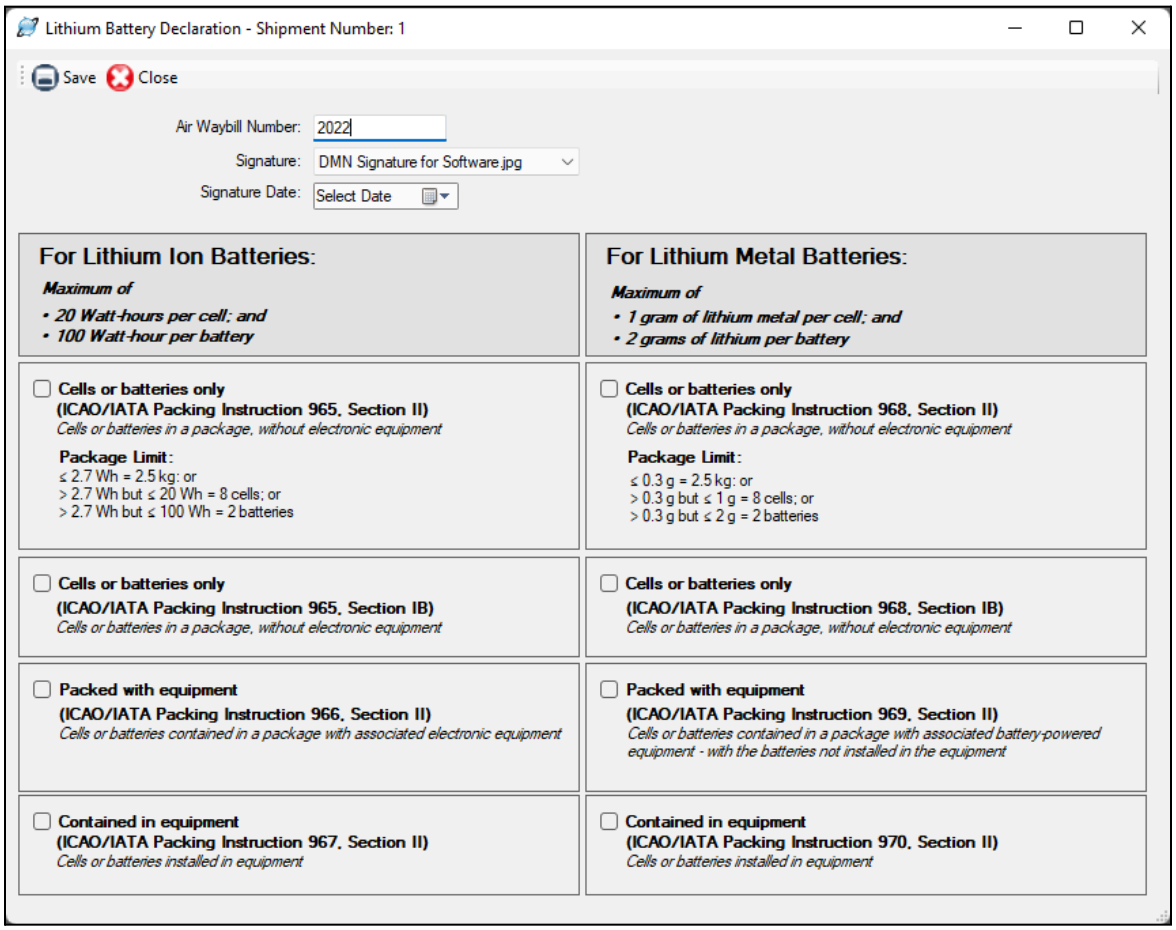
Shipment Date
Enter the date when signing the declaration.

Article and Description
List each non-dangerous product included in this shipment and all the related information.

Additional Handling Information
Enter additional specific handling information or statement that may be required.

When you have filled in all the **Non-Dangerous Goods** fields, click **Save** and then **Close**. You have three options for printing the document on the **Preview/Print/Email** screen. You can print the entire form, print data only on a preprinted form you have purchased, or you can print the form excluding only the green borders on paper you have purchased pre-printed with the green borders.

The Lithium Battery Declaration Screen in EZ Start



Lithium Battery Declaration Screen (Professional Only)

If you ship lithium batteries, you may want to use the lithium battery declaration form.

Air Waybill Number

Enter the waybill number for this shipment that was provided by the carrier. This field is shared with the Bills of Lading-Air Waybill screen, so if you enter it there, it will automatically populate here and vice versa.

Signature

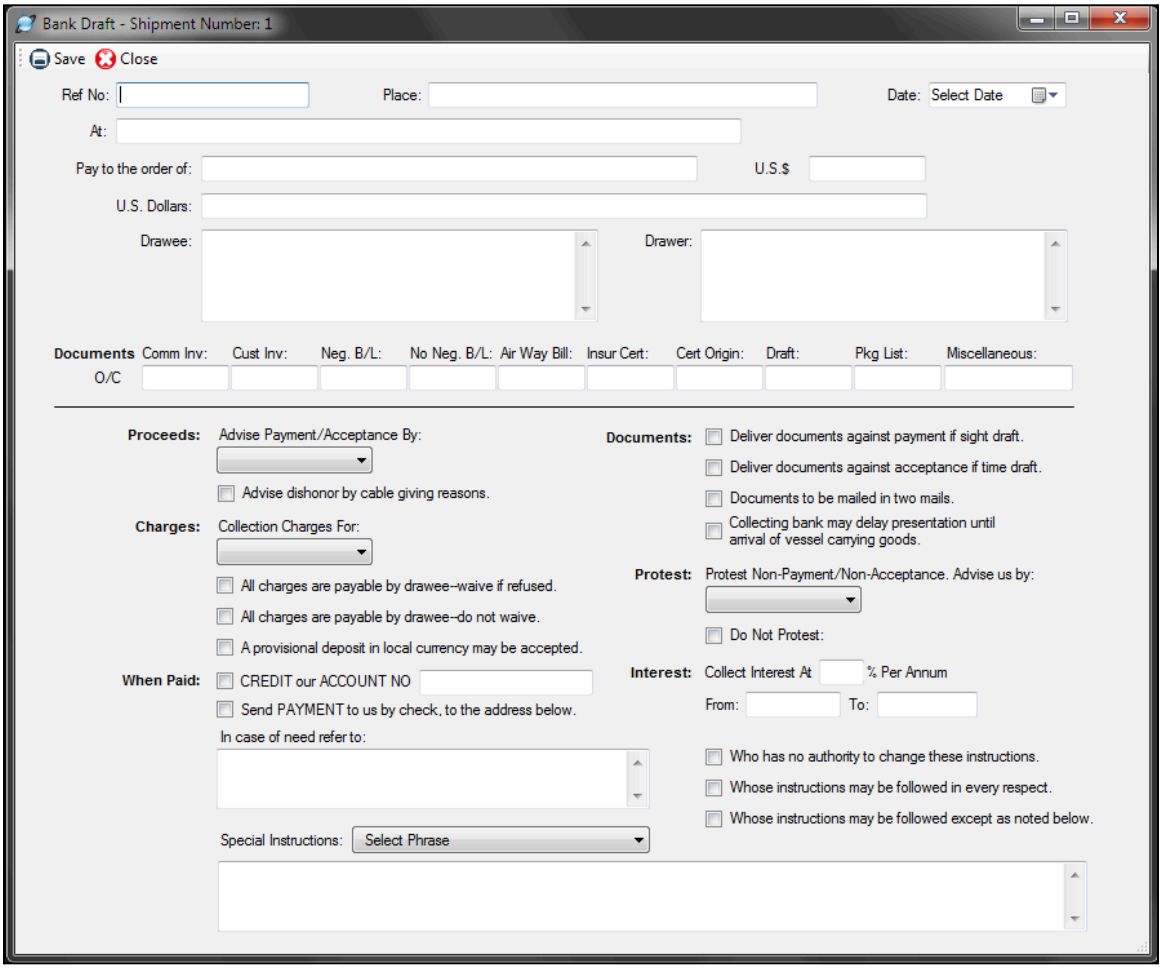
If you have assigned a signature to the profile used for this shipment, the signature file will be filled in here. However, you can choose a different signature from the drop-down list to be used on this document.

Signature Date

Select the date you want to appear at the bottom of the document next to the signature.

Check the boxes that apply to the type of lithium batteries you are shipping.

The Bank Draft Screen in EZ Start



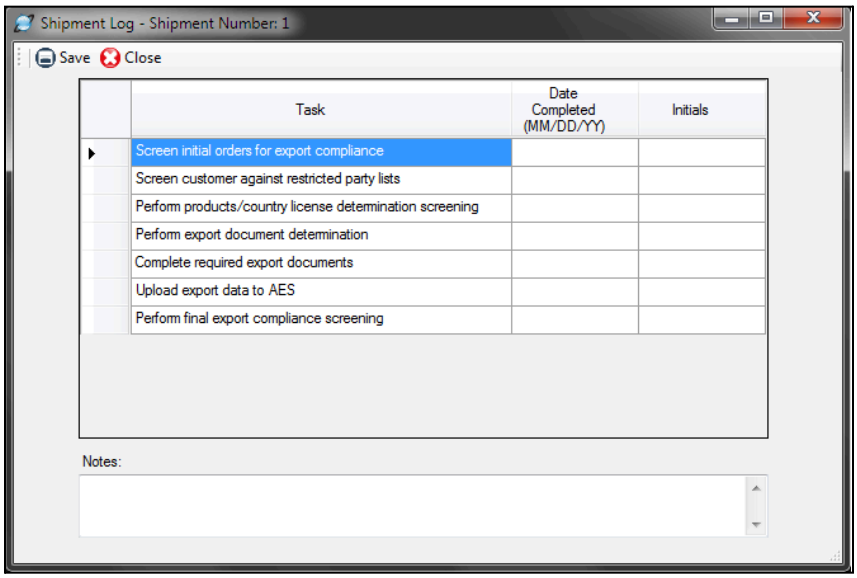
Bank Draft Screen

Fill in this information to produce a bank draft with or without a transmittal letter.

Security Endorsement Screen

If you don't regularly ship with certain airlines, they may request an FAA Security Endorsement form that lists two forms of picture ID and includes a statement that the shipment does not contain unauthorized explosives, destructive devices, or hazardous materials.

The Shipment Log Screen in EZ Start



Shipment Log Screen (Professional Only)

To ensure compliance with export regulations, the Bureau of Industry and Security (BIS) strongly recommends that companies create a written Export Compliance Program (ECP) 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. While an ECP isn't mandatory, BIS officials say that creating and following such a plan can be an important mitigating factor that could reduce or eliminate penalties if BIS finds that your company accidentally violated export rules and laws.

Penalties can run as high as $250,000 per civil export violation or twice the value of a transaction, whichever is greater. (Criminal violations can result in a fine of up to $1 million, imprisonment for up to 20 years, or both.) This makes creating and following an ECP a good investment.

The **Shipment Log** screen allows you to document that each step of your ECP is being followed. The information entered into this screen does not appear on any of the export forms, but it will automatically be saved in the software and you can print out the shipment log for any shipment from the **Preview/Print/Email** screen.

Task

This is the list of tasks that your company has determined should be followed for every export shipment. This list is preloaded with seven tasks outlined in the sample ECP provided by BIS. You can delete, modify or add new tasks to this list in the **Shipment Log Items** database. Go to the **Databases** tab, click **Shipment Log Items**, then **Add**.

Date Completed

As each task is completed, enter the date.

Initial

Enter the initials of the person or persons completing each task.

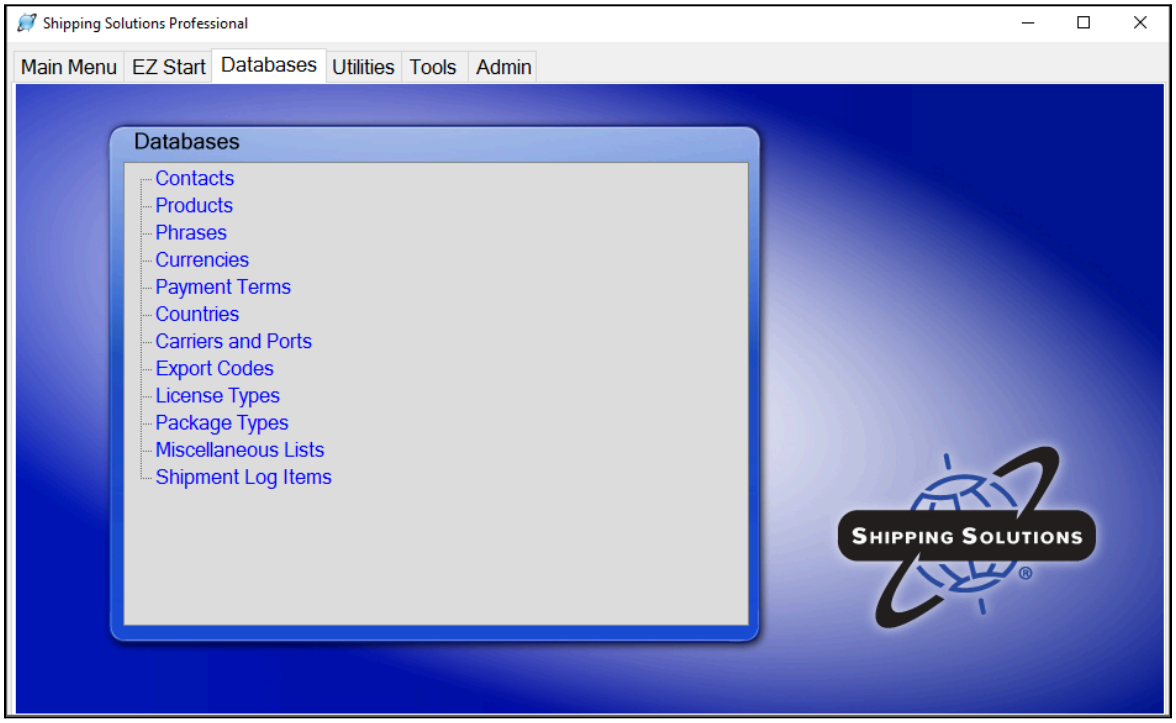
Notes

Enter any free-form notes you wish to save with this shipment record.

When you have filled in all the **Shipment Log** fields, click **Save** and then **Close**.

Shipping Solutions Databases

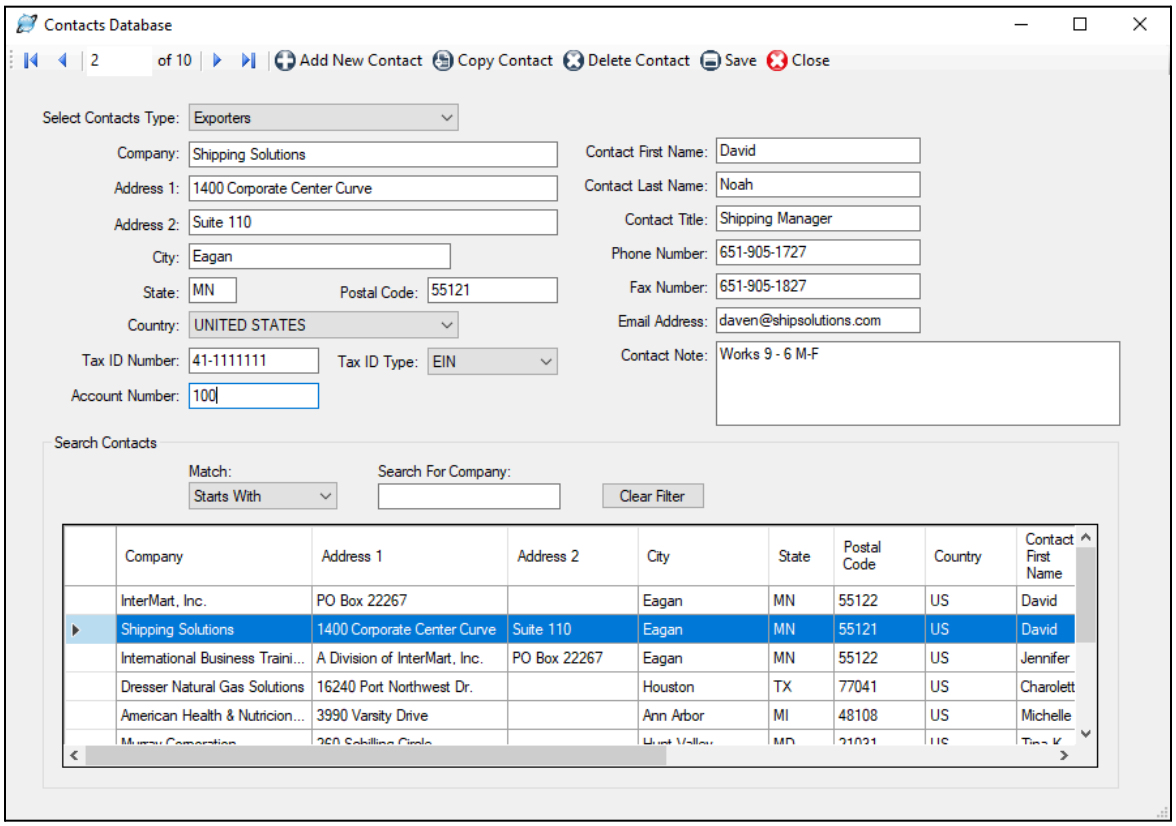
The Databases Tab in Shipping Solutions



To get the maximum benefit from Shipping Solutions, the first time you start 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.

You can either enter information into the various databases one record at a time from within the various database screens as described on the following pages, or you can import a group of records from an existing spreadsheet or database by using the **Import Contact and Product Databases** features on the **Tools** tab (see here).

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



Contacts Database

To view or enter information into the various contact databases, click on **Contacts** from the list of the Shipping Solutions databases. This will open a new window labeled **Contacts Database**. When you first open the **Contacts Database**, the **Exporter** database will appear on screen. From here you can enter your company information in the various fields. If you have more than one company location and/or multiple divisions within your company, you can enter them all as separate records.

To select a different Contacts database, click on the drop-down menu next to the **Select Contacts Type** label. From this drop-down menu, you can view and/or enter contact information into the **Ultimate Consignee**, **Intermediate Consignee**, **Freight Forwarders**, **Bill To**, and **Miscellaneous Contacts** databases in addition to the **Exporters** database.

When you begin preparing a new shipping record on the **EZ Start** tab, every contact record you enter into the Contacts databases will be available from drop-down menus, so you don't have to manually type this information into the shipment record. Select the appropriate contacts for your shipments and Shipping Solutions will automatically enter all the related information.

Add a New Contact

To manually enter a new contact into one of the Contacts databases, first make sure you select the correct Contacts database from the **Select Contacts Type** drop-down menu. This will bring up the list of existing contacts, if any, that are already in that database. Next, click on the **Add New Contact** button on the toolbar at the top of the window. This will clear out all the data fields on the screen. You can then add information into the fields listed below.

If you wish to copy an existing contact to a different contact type—for example, add an existing Ultimate Consignee contact to the Bill To contact database—click on the **Copy Contact** button on the toolbar. You can also use this button to duplicate a contact in the same database they already reside and then change some of the information for that contact. For instance, you can copy a contact from a specific company and then change that new contact record by changing the first and last names.

The following fields are part of each of the different Contacts databases:

Company
Enter the company name.

Address Fields
Enter the company's address information.

Tax ID Number
Enter the company's identification number, usually the tax ID number. Shipments to Europe will require an EORI number, and shipments to China will require an USCI number. The **Tax ID Number** field is big enough to accommodate those numbers.

ID Type
Select the type of ID Number that you used: **D-U-N-S** for a number assigned by Dun & Bradstreet, **EIN** for a U.S. tax identification number, or **Foreign** for a foreign country's identification number.

Account Number
Enter the company's account number if you have assigned it one.

Contact First Name
Enter the first name of the contact for this company.

Contact Last Name
Enter the last name of the contact for this company.

Contact Title
Enter the title of the contact person entered above.

Phone Number
Enter the company's or the contact's telephone number.

Fax Number
Enter the company's or the contact's fax number.

Email Address
Enter the contact's email address.

Contact Note
This field is provided strictly as a convenience. The information you enter in this field will not appear on any forms.

The Foreign Trade Regulations also required one additional data field for the Ultimate Consignee for all shipments filed through AES. The Ultimate Consignee Database also includes:

Ultimate Consignee Type
Choose the type of consignee that best describes its business: Direct Consumer, Government Entity, Other/Unknown, or Reseller.

Once you have entered all the information you wish to include for this new contact record, click on the **Save** button on the toolbar. This will save all the information you entered, and it will add this new record to the grid of existing contacts that appears at the bottom of the window.

Click on the **Close** button on the toolbar to exit the Contacts database.

Please Note: If you are adding multiple contacts into the Contacts database, you can import a list of contacts from an existing spreadsheet or database using Shipping Solutions' **Import Contact and Product Databases** feature located on the **Tools** tab. (See here for more detail.)

Search for a Contact

The **Search Contacts** section of the **Contacts Database** screen displays a grid of all the contacts already entered into the database. You can search for an individual record in one of two ways:

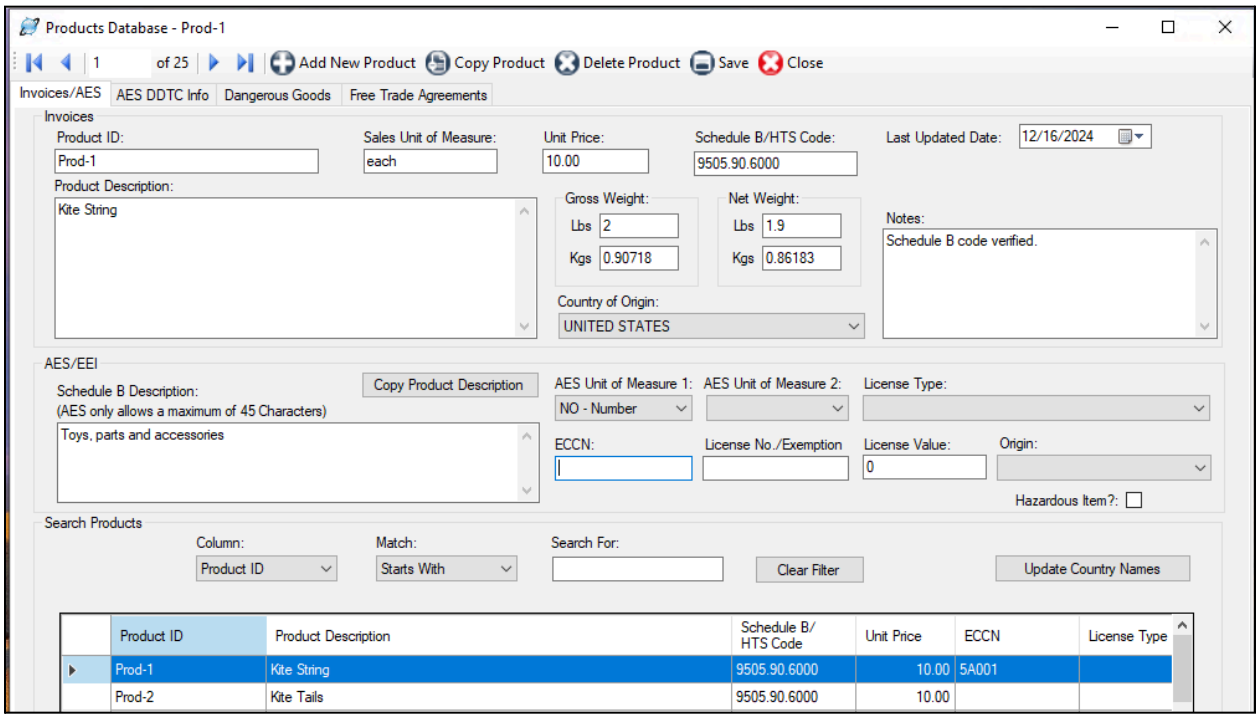
1. You can type in the name of the company you are searching for by entering the company name into the **Search For Company** field. By default, this search option will find all company names that **Starts With** the information you entered. If you want to find the company name within the **Company** field, click on the drop-down menu in the **Match** field and choose the **Contains** option. Click on the appropriate company in the contacts grid to have the contact information appear in the individual fields located in the top portion of the window. To clear a previous search, click on the **Clear Filter** button.
2. You can sort the contacts already entered into the database by clicking on the column header in the grid at the bottom of the page. Clicking on the column header once will sort all the contacts in ascending alpha/numeric order; clicking the column header a second time will sort the contacts in descending order. You can sort all the contact records by clicking on any of the column headers. For example, clicking on the **Postal Code** column header will arrange all your contacts in this database from the smallest number value to the highest number value. Use the scroll bar on the right side of the grid if you have more records than are visible in the grid.

Delete a Contact

To remove one or more contacts from a database, find the record you wish to delete by following the search instructions listed above. Once you have found the correct contact, highlight that contact record by clicking on it in the grid located at the bottom of the window. Once you click on a record it should be highlighted in blue. You can select more than one contact record by holding down the **Ctrl** button on your keyboard and clicking on every contact record you wish to delete.

Once you have highlighted one or more contacts, click on the **Delete Contact** button on the toolbar at the top of the window, which will delete the highlighted contact record(s). The deletion will not be permanent until you click on the **Save** button on the toolbar.

Click on the **Close** button on the toolbar to exit the Contacts database.



Products Database

Whether your company exports a dozen different products or 12,000 different products, the **Products Database** will save you an extraordinary amount of time rekeying the information on every shipment. Once you have entered your product information in the **Products Database**, it will be available from a pull-down menu on the **EZ Start** tab every time you prepare a new shipment.

The **Products Database** allows you to edit the information once it has been entered on the **EZ Start** tab. Let's say, for example, that you enter a standard price for a product in the **Products Database**. When you prepare a new shipment, you select that product from the pull-down menu on the **EZ Start** tab and all the product information—including the price—automatically fills in on the screen. However, for this shipment, the customer has negotiated a special lower price for this product. With Shipping Solutions, you can simply edit the price on the **EZ Start** screen *without affecting the price saved in the **Products Database***.

To view or enter information into the **Products Database**, click on **Products** from the list of the Shipping Solutions databases. This will open a new window labeled **Products Database**. From here you can enter your product information in the various fields. You can store each of your products as a separate record in the database.

Add or Copy a New Product

To manually enter a new product into the **Products Database**, click on the **Add New Product** button on the toolbar at the top of the window. You can then add information into the fields listed below. To copy an existing product, find that product in the database and click **Copy Product**. The product will be copied into a new record with the Product ID appended with "-copy1". You can then change the Product ID and any other information to reflect the new product.

The **Product Database** is divided into different sections related to the different export forms you can produce in Shipping Solutions: **Invoices**, **AES/EEI**, and **Free Trade Agreements**, although the data entered in one section will usually print on other export documents as well.

In addition, the top of the **Products Database** window includes four tabs: **Invoices/AES**, **AES DDTC Info**, **Dangerous Goods** and **Free Trade Agreements**. All users will need to enter information on the first tab, **Invoices/AES**. If one or more of your products falls under the jurisdiction of the State Department's Directorate of Defense Trade Controls, which is primarily military items and weapons, you will need to click on and enter the information on the **AES DDTC Info** tab. If you are shipping dangerous goods, you will need the **Dangerous Goods** tab. If your products qualify for reduced tariffs under one or more of the United States' FTAs, you can save the appropriate information on the **Free Trade Agreements** tab.

The following fields are in the **Invoices** section of the **Products Database**:

Product ID
Enter the part number, SKU number or other type of product number that your company has assigned to this product, if any.

Product Description
Enter your company's description of the product as you wish it to appear on the invoices.

Sales Unit of Measure
Enter the unit of measure for this product as it is calculated for invoicing purposes.

Unit Price
Enter the price per piece or per unit for the product. Shipping Solutions allows you to enter a unit value with up to five decimal places.

Schedule B/HTS Code
Enter the Schedule B Commodity Classification or Harmonized Tariff System (HTS) Code for your product. The first six digits of the code are the Harmonized System (HS) code and will appear on any document used internationally; all 10 digits appear on domestic documents such as the Shipper's Letter of Instruction (in SED or NCBFAA format) as well for filings through the Automated Export System (AES). All the codes should be checked and updated at least annually.

Please Note: Do not enter any periods with your Schedule B/HTS product codes; Shipping Solutions will insert those automatically.

Gross Weight
The total weight for this product including packaging. You can enter this weight in pounds or kilograms, and Shipping Solutions will automatically convert it and fill in the other box.

Net Weight
Enter the weight of the product without any immediate wrappings; i.e., the weight of the contents of a tin can without the weight of the can. You can enter this weight in pounds or kilograms, and Shipping Solutions will automatically convert it and fill in the other box.

Country of Origin
Select the country of origin from the drop-down menu for your product if you wish it to appear on your commercial and proforma invoices as well as on the generic certificate of origin. Otherwise, you can leave this field blank.

Last Updated Date and Notes
Use these fields to note the last time the product was reviewed and data verified such as Schedule B Code.

The following fields are in the **AES/EEI** section of the **Products Database**. This information is required for creating an SLI in SED or NCBFAA format and for filing your Electronic Export Information through the Automated Export System (AES).

Typically, the export information for any shipment to a country other than Canada must be filed through AES if the value of any line item (or group of line items with the same Schedule B or Harmonized Tariff Code number) is more than $2,500, or if any item requires an export license. You may skip these fields if your company isn't required to file through AES:

Schedule B Description

Enter the description for the product as it appears in the HTS or Schedule B Commodity Classification Code published by the U.S. Department of Census. This description is what will be submitted to Census if you file electronically through AES or if you print an SLI in SED or NCBFAA format.

Please Note: AES allows a description with a maximum of 45 characters. If you wish to use the same description as it appears in the **Product Description** field in the invoices section of this window, simply click on the **Copy Product Description** button.

AES Unit of Measure 1

The unit of measure that is submitted to AES must match the unit of measure that appears in the Schedule B or HTS codes and may be different from the unit of measure your company uses for invoice purposes. Shipping Solutions provides a drop-down menu with the complete list of acceptable codes.

Please Note: If you do not select the appropriate unit of measure as indicated in the Schedule B or Harmonized Tariff codes, you will receive an error message when you try to file through AES.

AES Unit of Measure 2

The U.S. Census Bureau requires exporters of certain, limited products to report two quantities and two units of measure when filing through AES. If this product is one of those products, enter your second unit of measure here. Otherwise, leave this field blank.

License Type

Select the license type from the drop-down menu or type it directly into this field. If no license is required, select **C33 - No Licensed Required (NLR)**.

ECCN

Enter the export control classification number, if necessary, for your product. You will find a listing of all the ECCN numbers in the Commerce Control List in the Export Administration Regulations (EAR). You will find the EAR online at the Bureau of Industry and Security's website: www.bis.doc.gov.

License No/Exemption

When you select a License Type in the field above, the appropriate license exemption will automatically fill in here if there is one. Otherwise, fill in your license number. See the Appendix here for a list of license types and their required codes.

License Value

For shipments requiring an export license, report the value designated on the export license that corresponds to the commodity being exported.

Origin

Indicate the type of export:

> **(D) Domestic**—Merchandise that is grown, produced, or manufactured in the United States (including imported merchandise that has been enhanced in value or changed from the form in which it was imported by further manufacture or processing in the United States).
>
> **(F) Foreign**—Merchandise that has entered the United States and is being re-exported in the same condition as when imported.

Hazardous Item
Check this box if this item qualifies as hazardous under Department of Transportation regulations.

Search Products Section

The **Search Products** section of the **Products Database** screen displays a grid of all the products already entered into the database. You can search for an individual record in one of two ways:

1. First choose whether you wish to search for a product by its **Product ID** or **Description** in the drop-down menu labeled **Column**. Next click on the **Match** drop-down menu to indicate whether you wish to search for an item that **Starts With** or **Contains** the information you will be entering into the **Search For** field. Finally, enter what you are looking for in the **Search For** field. As you type in more information, the product grid below will start narrowing down the list of matching products. Click on the appropriate item in the product grid to have the product information appear in the individual fields located in the top portion of the window. To clear a previous search, click on the **Clear Filter** button.
2. You can sort the products already entered into the database by clicking on the column header in the grid at the bottom of the page. Clicking on the column header once will sort all the products in ascending alpha/numeric order; clicking the column header a second time will sort the products in descending order. You can sort all the product records by clicking on any of the column headers. For example, clicking on the **Schedule B/HTS Code** column header will arrange all your products from the smallest number value to the highest number value. Use the scroll bar on the right side of the grid if you have more records than are visible in the grid. Click on the appropriate item in the product grid to have the product information appear in the individual fields located in the top portion of the window.

Update Country Names

If you had previously used Shipping Solutions Classic 6 or Shipping Solutions Professional 7 and converted your old Product Database to Classic 8 or Professional 9, you may experience a problem getting a product's country of origin to appear on the Commercial Invoice, Proforma Invoice or Certificate of Origin. This is because the Country of Origin might not have included both the full country name and the two-character country code.

If you are experiencing this problem, you can update all the products in your Product Database by clicking on the **Update Country Names** button on this screen. This is something you will only need to do once.

Delete a Product

To remove one or more products from the **Products Database**, find the record you wish to delete by following the **Search** instructions listed above. Once you have found the correct product, highlight that product record by clicking on it in the grid located at the bottom of the window. Once you click on a record it should be highlighted in blue. You can select more than one product record by holding down the **Ctrl** button on your keyboard and clicking on every contact record you wish to delete.

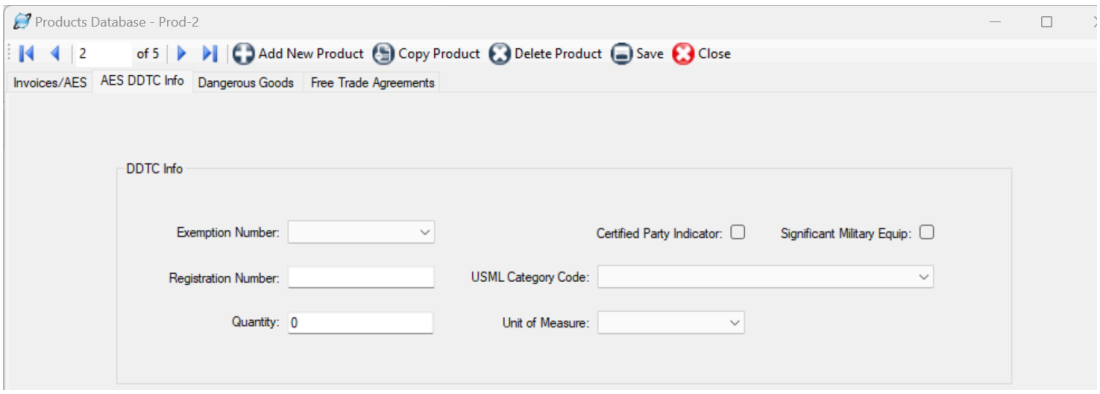
Once you have highlighted one or more products, click on the **Delete Product** button on the toolbar at the top of the window, which will delete the highlighted contact record(s). The deletion will not be permanent until you click on the **Save** button on the toolbar.

Click on the **Close** button on the toolbar to exit the **Products Database**.

Importing Products

If you are adding multiple products into the Products database, you can import a list of products from an existing spreadsheet or database using Shipping Solutions' **Import Contact and Product Databases** feature located on the **Tools** tab. (See here for more detail.)

The AES DDTC Info Tab on the Products Database Screen



AES DDTC Info Tab

The following fields located in the DDTC Info section of the **AES DDTC Info** tab are only required if your product requires a specific DDTC State Department license for export. This section doesn't affect most exporters, who should simply skip these fields:

Exemption Number
If required by the license type, select the exemption number from the drop-down menu that is the specific citation from the International Traffic in Arms Regulations (ITAR) (22 CFR 120-130) that exempts the shipment from the requirements for a license or other written authorization from DDTC.

Registration Number
If required by the license type, the number assigned by DDTC to persons who are required to register per Part 122 of the ITAR (22 CFR, 120-130), that has an authorization from DDTC (license or exemption) to export the article.

Quantity
If required by the license type, enter the quantity for the line item being shipped. The quantity is the total number of units that corresponds to the **Unit of Measure** field (see above).

Certified Party Indicator
Check this box if the U.S. exporter can certify that the exporter is an eligible party to participate in defense trade. See ITAR (22 CFR 120.1(c)). This certification is required only when an exemption is claimed.

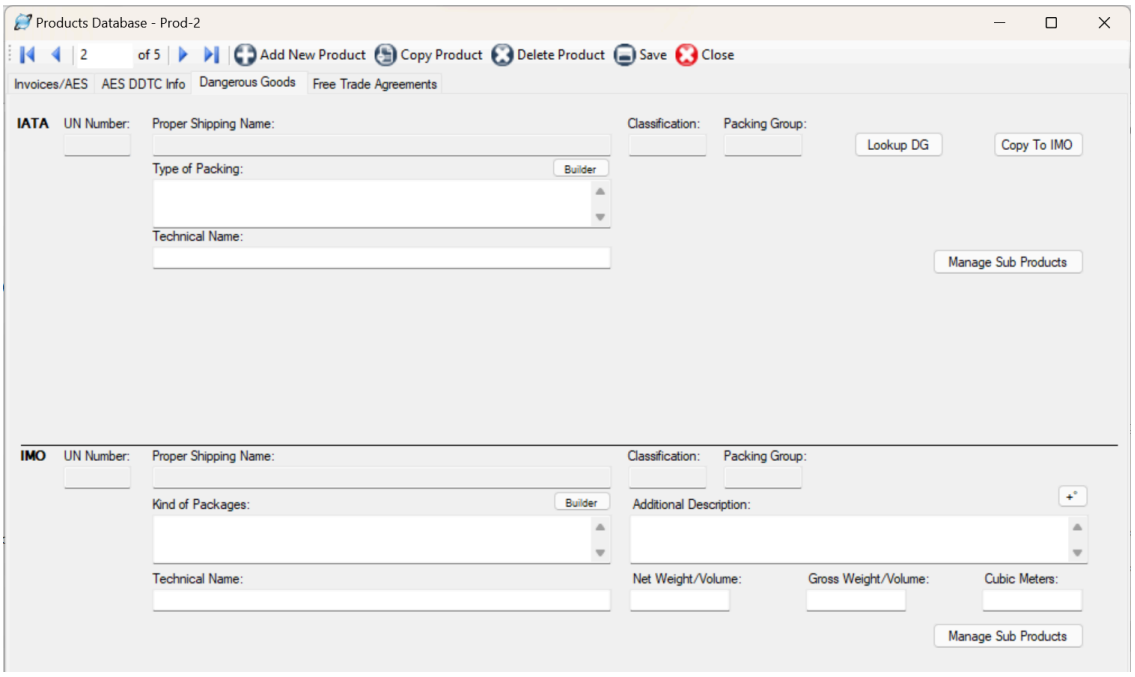
Significant Military Equip.
Check this box if this line item appears on the United States Munitions List (USML) for which special export controls are warranted because of their capacity for substantial military utility or capability. See Section 120.7 of the ITAR (22 CFR, 120-130) for a definition of SME and Section 121.1 for items designated as SME articles.

USML Category Code
If required by the License Type, select from the drop-down menu the USML category of the article being exported (22 CFR 121).

Unit of Measure
If required by the license type, select the unit of measure for this line item from the drop-down menu.

Once you have entered all the information you wish to include for this new product record, click on the **Save** button on the toolbar. This will save all the information you entered into the appropriate database and it will add this new record to the grid of existing contacts that appears at the bottom of the window.

The Dangerous Goods Tab on the Product Database Screen



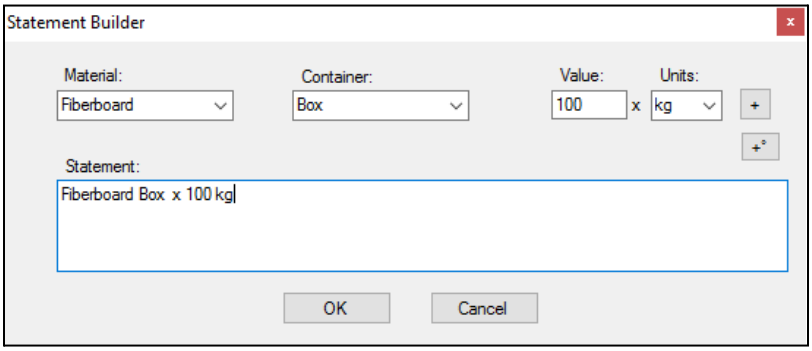
Dangerous Goods Tab

If your item is considered a dangerous good (DG) by either the International Air Transport Association (IATA) or the International Maritime Organization (IMO), you will want to complete these fields so that you can prepare the proper documentation for your shipment. The screen is divided into **IATA** and **IMO** sections.

IATA Section

Click the **Lookup DG** button to open the IATA Database of Dangerous Goods. You can search by UN Number or Proper Shipping Name. Find the proper entry for your item and click **Select**. The **UN Number**, **Proper Shipping Name**, **Classification** and **Packing Group** will fill in on the DG tab.

The Statement Builder Screen



Type directly in the **Type of Packing** box or click the **Builder** button for help in entering your packing information. On the **Statement Builder** screen, choose your **Material** and **Container** from the drop-down lists. Enter the amount

in the containers in the **Value** box and either L for liters or kg for kilograms from the **Units** drop-down list. Click the plus button to add the **Value** and **Units** to your type of material and container in the **Statement** box. Use the degree button to add that symbol to a flashpoint, if needed. You can also use this box, if needed, to describe an overpack. Click **OK** to return to the DG tab.

If your DG item requires a technical name following the **Proper Shipping Name**, enter it in the **Technical Name** box. Do not include the required parenthesis because Shipping Solutions will automatically add them.

IMO Section

Although the list of Dangerous Goods for IMO is slightly different than IATA, a **Copy to IMO** button is provided. You may need to edit the **UN Number**, **Proper Shipping Name**, **Classification**, and **Packing Group** if it is different for IMO than for IATA.

Type directly in the **Kind of Packages** box or click the **Builder** button as described in the IATA section. Use the **Additional Description** box to enter any information that you want to follow the **UN Number**, **Proper Shipping Name**, **Classification**, and **Packing Group**. This information could include a flashpoint, so a degree button is provided to add that symbol.

If your DG item requires a technical name following the **Proper Shipping Name**, enter it in the **Technical Name** box. Do not include the required parenthesis because Shipping Solutions will automatically add them.

If you know the values, enter the **Gross Weight/Volume**, **Net Weight/Volume**, and **Cubic Meters**. You will be able to display either **Net Weight/Volume** or **Cubic Meters** along with **Gross Weight/Volume** on the DG documents.

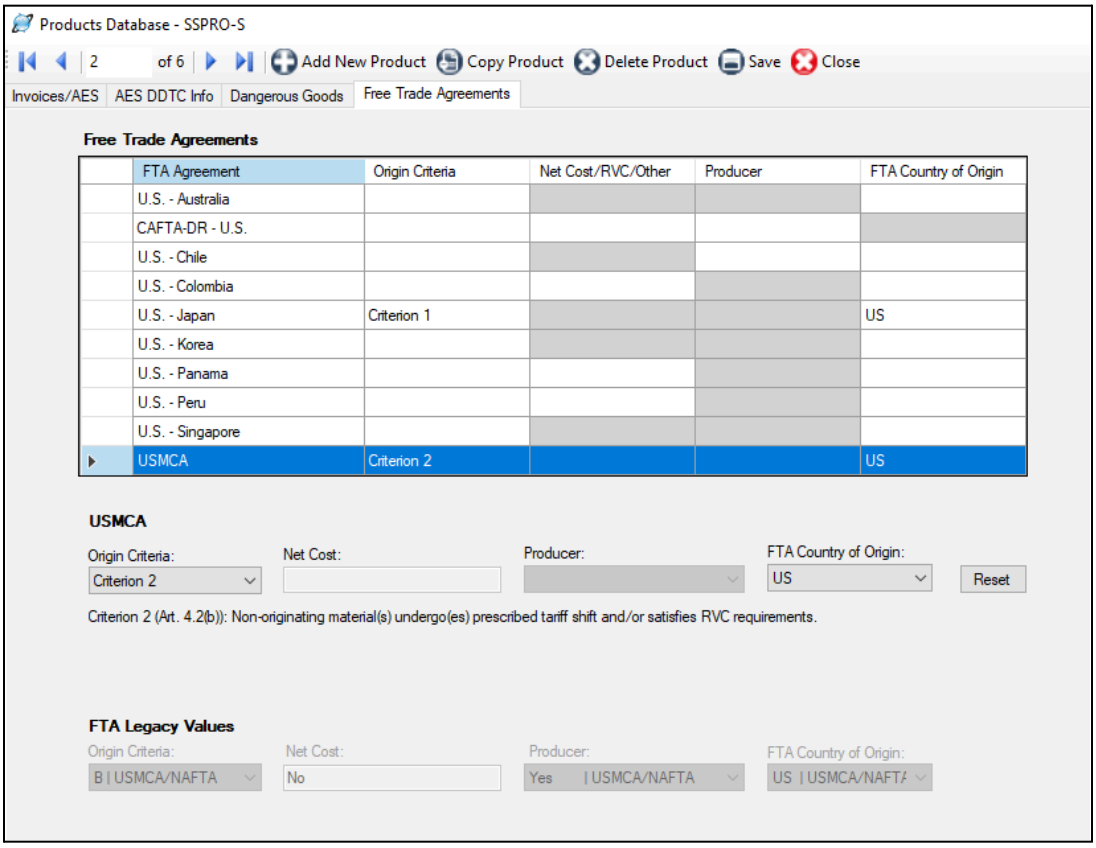
Sub Products

If you have products that include DG items that are not listed separately on your commercial invoice, you can list them as sub products. For example, a machine that includes a lithium battery will probably be listed by the machine name on the Commercial Invoice, but the battery needs to be listed on the dangerous goods document. To add a sub product to an item, first enter the sub product as a product on the **Databases** tab, **Products** screen. Be sure to include a **Product ID** and the fields on the **Dangerous Goods** tab.

Then locate the main product in the **Products** database. On the **Dangerous Goods** tab, click the **Manage Sub Products** button. A screen will come up that will allow you to search the **Products** database for the sub product. Click **Add** and the item will be copied to the lower grid showing that it is a sub product to this product. Repeat the process for as many sub products as needed. Click **Close**.

The **Sub Products** will appear in a grid at the bottom of the IATA and IMO sections. You must enter the sub products separately for IATA and IMO.

The Free Trade Agreements Tab on the Product Database Screen



Free Trade Agreements Tab

Shipping Solutions provides a grid to store the data elements needed to complete the certificates of origin for most of the free trade agreements (FTAs) that the United States has entered into with other countries: the Australia FTA, the CAFTA-DR FTA, the Chile FTA, the Colombia Trade Promotion Agreement (TPA), the Japan FTA, the Korea FTA, the Panama TPA, the Peru TPA, the Singapore FTA, and the USMCA (Canada and Mexico).

Each of the free trade agreements that the United States has entered with other countries include different data elements to prove that your goods qualify under the rules of origin for that agreement. When you click on a FTA Agreement in the grid, the data elements required will be activated. If a field is grayed out, it means that the field is not used for that FTA.

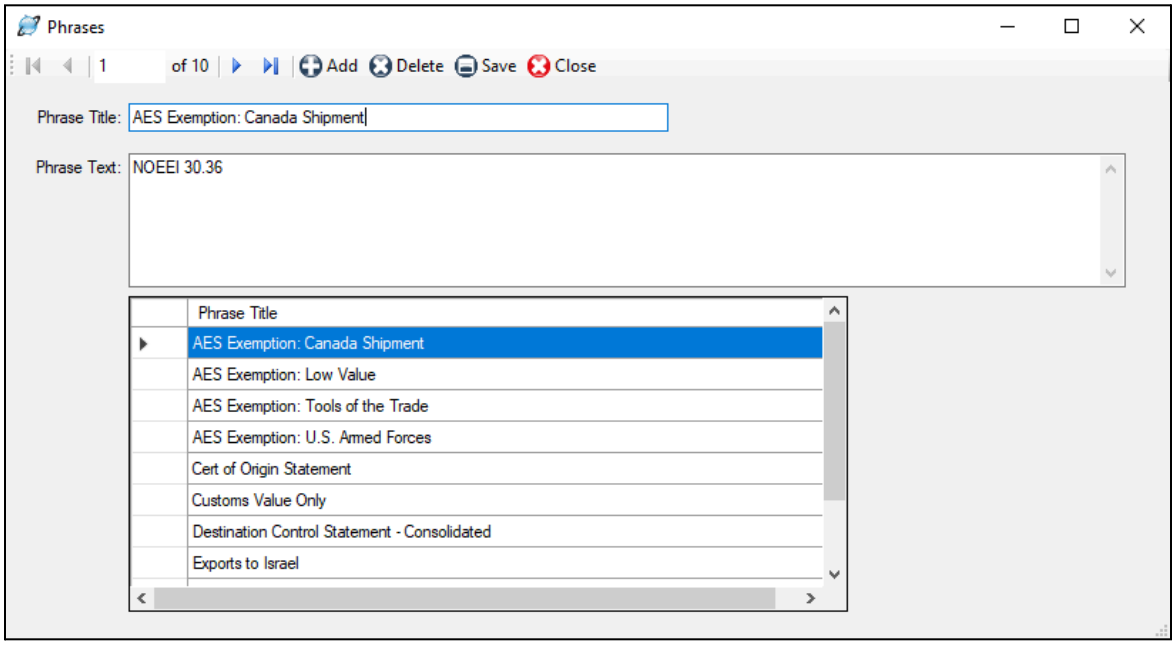
When you select an **Origin Criteria** from the drop-down list, the definition of that criterion will be displayed. You can also refer to the FTA Code Chart for all the Origin Criteria and definitions of the other fields. Use the **Reset** button if you want to clear the FTA data for the highlighted FTA for this product.

You should make sure you understand how to qualify your goods under each of the appropriate free trade agreements before you ever provide a Certificate of Origin to an importer. You may skip the fields in this section if your shipment does not qualify—or you are not sure if it qualifies—for preferred tariff treatment under a U.S. free trade agreement.

See the FTA Code Chart for a summary of the Preference/Origin Criteria definitions. For a detailed explanation of each of the agreement's rules of origin and what the abbreviations and citations represent, visit the U.S. Trade Information's website, www.export.gov/FTA/index.asp.

If you have been using Shipping Solutions prior to version 9.18/8.18 and had data already stored in the FTA fields, that data will be copied to the appropriate line in the grid and displayed as **FTA Legacy Values**. This is for informational purposes only in case you need to see what information you had entered prior to Version 9.18/8.18.

The Shipping Solutions Phrases Database



Phrases Database

Certain export forms require that certain phrases appear on the documents. For example, under the Export Administration Regulations and the International Traffic in Arms Regulations, the Destination Control Statement should appear on the commercial invoices for most export shipments. In other cases, companies may have their own standard statements and phrases that must be added to their export forms.

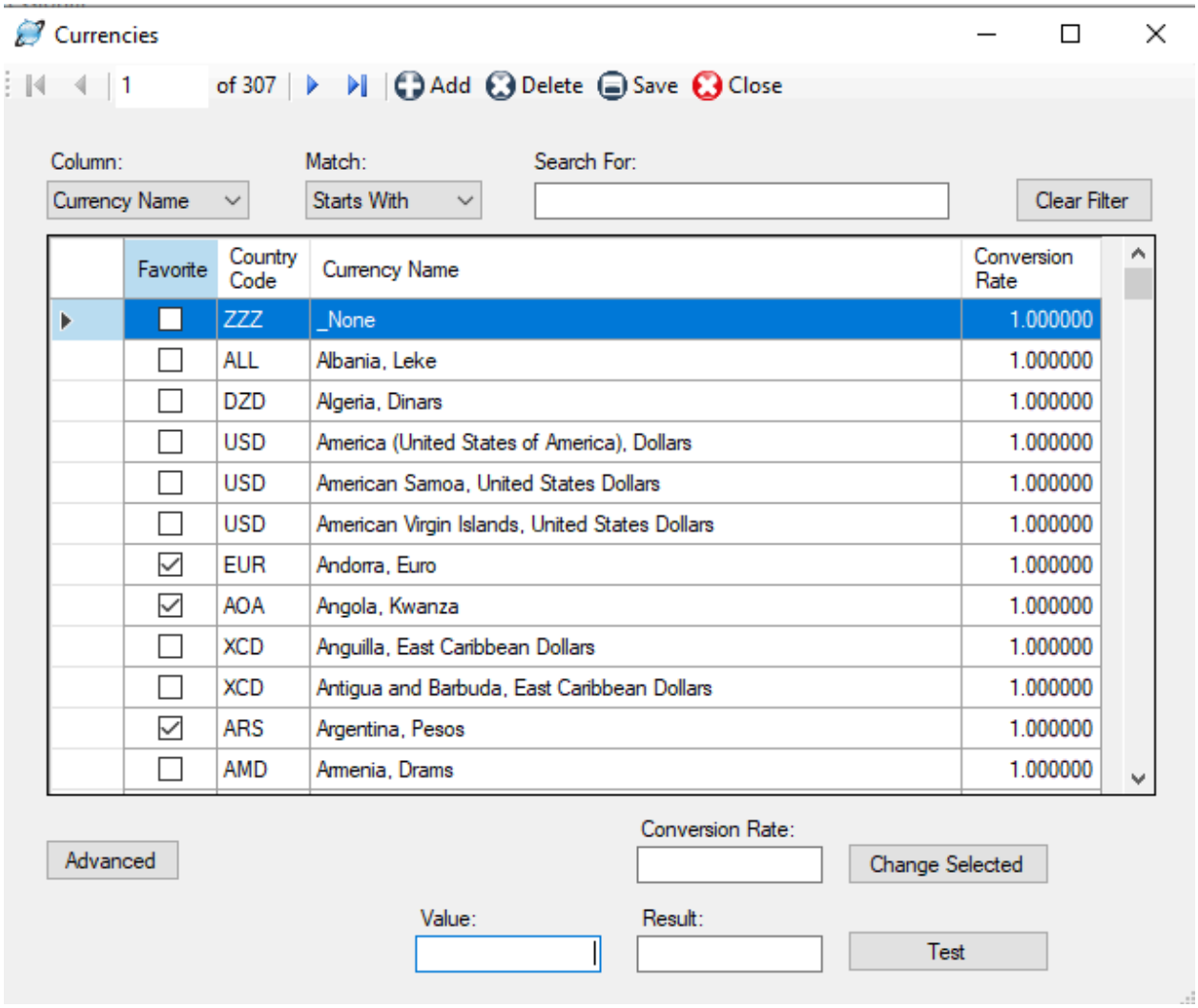
Shipping Solutions' **Phrases Database** allows you to store your common statements and phrases so that you can access them from a drop-down menu on the **EZ Start** screens rather than retyping them on every form every time you prepare a new set of export documents. Shipping Solutions preloads the Consolidated Destination Control Statement and a standard Chamber of Commerce statement used on a Certificate of Origin to verify the origin of a company's goods. In addition, Shipping Solutions preloads the four most commonly used exemption statements indicating why a company is not required to file through AES for an export shipment.

To add a new phrase to the **Phrases Database**, click on the **Add** button on the toolbar. Enter a **Phrase Title** in the appropriate field. This is the title that will appear in the drop-down menu in the various **EZ Start** screens, so you should make sure to give your new entry a recognizable title. Then enter the entire phrase in the **Phrase Text** box. Click **Save** to save the new entry.

To remove any of the statements from the **Phrases Database**, highlight the one you want to remove and then click on the **Delete** button on the toolbar.

Click on the **Close** button on the toolbar to exit the **Phrases Database**.

The Shipping Solutions Currencies Database



Currencies Database (Professional Only)

Shipping Solutions Professional gives you the flexibility to create commercial and proforma invoices using a currency other than U.S. dollars and/or calculating the total value of both those invoices in two different currencies. In either case, you can use currencies other than U.S. dollars on the two invoices while still filing your Electronic Export Information (EEI) through the Automated Export System (AES) in U.S. dollars, which is what is required by export regulations.

The **Currencies Database** includes a list of most currencies of the world along with the three-character ISO code for each currency and a field for entering an exchange or conversion rate from U.S. dollars to that alternate currency. The exchange rate could be set in a sales contract or may be tied to a specific third-party rate. In any case it is up to you to update the exchange rate as necessary to stay accurate.

A currency can be marked as a "Favorite" by checking the box next to it. Favorites will appear at the top of the currency list on the **Invoices—Proforma/Commercial** screen in **EZ Start.**

See the instructions for the **Invoices—Proforma/Commercial** screen in **EZ Start** beginning here for more information about adding alternate or multiple currencies to those two export forms.

Modifying a Currency Exchange Rate

You can enter and save exchange rates here so they are available to use on the invoices.

1. Select the alternate currency you wish to use:

A. You can search for a currency by using the search tools included in the database. In the drop-down menu labeled **Column**, choose whether you wish to search for a product by its **Currency Name** or **Country Code**. Next click on the **Match** drop-down menu to indicate whether you wish to search for an item that **Starts With** or **Contains** the information you will be entering into the **Search For** field. Finally, enter what you are looking for in the **Search For** field. As you type in more information, the product grid below will start narrowing down the list of matching products. When you see the currency you wish to use, click on it so it is highlighted. To clear a previous search, click on the **Clear Filter** button.

B. You can sort through the entire list of currencies in the database by clicking on a column header in the grid. Clicking on the column header once will sort all the currencies in ascending alpha/numeric order; clicking the column header a second time will sort the currencies in descending order. Use the scroll bar on the right side of the grid to work your way up and down the list. When you see the currency you wish to use, click on it.

2. Once you have selected a currency by highlighting it, enter the appropriate exchange rate in the **Conversion Rate** field, and then click the **Change Selected** button. You will see the change reflected in the currency grid.

3. If you wish to change the formatting used by the alternate currency, click on the **Advanced** button. This will display a new column in the **Currencies Database** labeled **Culture Code** and add a new field at the bottom of the window also labeled **Culture Code**. If you wish to change the formatting of this alternate currency, you can enter the correct culture code in this field and then click on the **Change Selected** button again. If nothing appears in the culture code field, this currency will print on the invoice without a currency symbol such as the dollar sign (“$”) and with two decimal places.

4. To test how the currency will appear on the commercial and proforma invoices, enter a numeric value in the **Value** field and click on the **Test** button. You will see the converted amount with the correct currency formatting and currency symbol in the **Result** field.

5. Make sure to click on the **Save** button on the toolbar to save your changes before exiting this screen.

If the alternate currency you wish to use does not already appear in the **Currencies Database**, click on the **Add** button in the toolbar and enter the correct information in the highlighted fields at the bottom of the grid. Remember to click on the **Save** button on the toolbar before exiting this screen or your new currency information will be lost.

Click on the **Close** button on the toolbar to exit the **Currencies Database**.

Payment Terms Database

The **Invoices—Proforma/Commercial** screen in **EZ Start** allows you to select the correct payment term for a shipment from the **Payment Terms Database**. Shipping Solutions preloads three common payment terms in the database.

Add
Click this button to add a new payment term to the database.

Delete
To remove an existing payment term from the database, highlight the term you wish to remove in the grid and then click on the **Delete** button.

Save
Click this button to save any changes you made to the database.

Close
Click this button to exit the Payment Terms Database.

Countries Database

This database provides a list of countries and their two- and three-character codes to several different country drop-down menus throughout the Shipping Solutions software. The two-digit codes are the official codes provided by the U.S. Census Bureau for use with the Automated Export System (AES) and a variety of export forms.

For the Commercial Invoice, Proforma Invoice, and Packing List, you can choose to display the two-digit, three-digit, or full name of the country. To choose what you want to display on each of these forms, go to the **Tools** tab, **Customize Documents** screen. Click on the form name to open the **Customized Properties** screen. Choose the option you wish to use from the **Display Country As** drop-down menu.

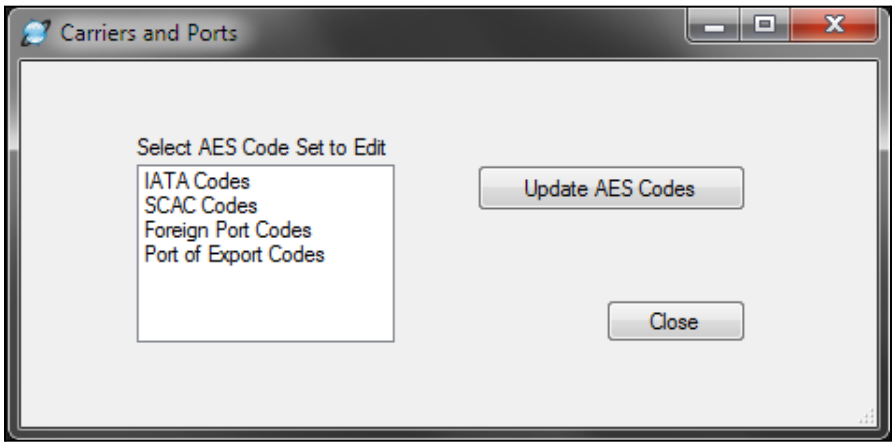
The database allows you to change any of the records by highlighting the name and/or code you wish to change and then typing in the new information. In addition, the toolbar allows you to make other modifications to the database if necessary:

Add
Click this button to add a new country name and code to the database.

Delete
To remove an existing country name from the database, highlight the country you wish to remove in the grid and then click on the **Delete** button.

Save
Click this button to save any changes you made to the database.

Close
Click this button to exit the **Countries Database**.



Carriers and Ports Database

This database comes preloaded with the latest set of carrier and port codes provided by the U.S. Census Bureau for use with the Automated Export System (AES). These lists of carriers and ports and their respective codes may be updated occasionally by the Census Bureau. You will be notified by the Bureau of any changes by email if you have registered as an Account Administrator at your company for AES.

According to the Census Bureau:

> *We make every attempt to keep our SCAC/IATA code table current. However, you may be unable to locate SCAC/IATA codes from time to time. If this should happen, please follow the procedures listed below. Try to obtain the SCAC/IATA code from the carrier… If the carrier cannot provide a SCAC/IATA code, you may use the following as a last resort.*
>
> ***99M**—Unknown Mexican Trucker*
> ***99F**—Unknown Foreign Air Carrier*
> ***99U**—Unknown U.S. Air Carrier*
> ***99C**—Unknown Canadian Air Carrier*
> ***UNKN**—Unknown Carrier: Ocean, Rail and Truck Modes of Transport Only*
> ***99O**—Aircraft Moving Under Its Own Power ("Flyaway Aircraft")*

Changes to this database can be made manually or by running an update script that will retrieve the latest list of carriers and ports and update them in your copy of the Shipping Solutions software.

Editing the Carriers and Ports Lists

To manually edit the list of carriers and ports and their respective names, click on the set of codes you wish to modify. This will open a new window that includes all the names and codes for the list you selected. You can change any of the records by highlighting the name and/or code you wish to change and then typing in the new information. In addition, the toolbar allows you to make other modifications to the database if necessary:

Add New

Click this button to add a new carrier or port name and code to the database.

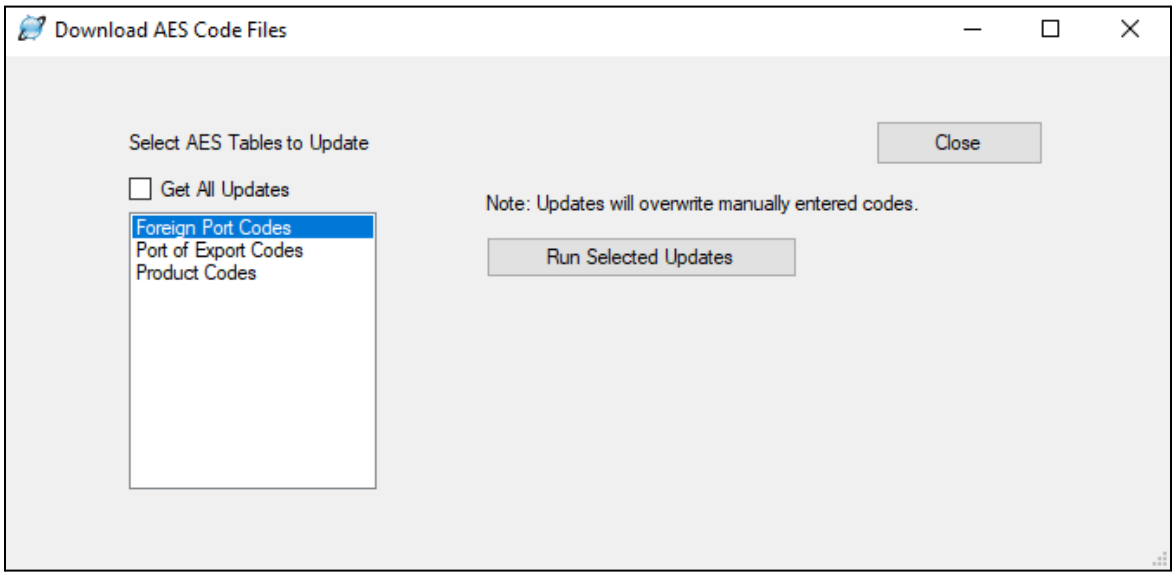
Delete

To remove an existing carrier or port name from the database, highlight the name you wish to remove in the grid and then click on the **Delete** button.

Save
Click this button to save any changes you made to the database.

Close
Click this button to exit any of the **Carriers and Ports Databases**.

Updating AES Codes on the Carriers and Ports Screen on the Databases Tab



Updating the Carriers and Ports Lists

To download and update the latest set of port names and codes provided by the Census Bureau, click on the **Update AES Codes** button, which will open a new window called **Download AES Code Files**. To update all three sets of names and codes, click the **Get All Updates** box. Because the IATA and SCAC codes are no longer provided by the Census Bureau, you can no longer download updates to these codes. You should get any new codes you need from your freight forwarder or directly from the carrier.

To download and update a specific list or lists, click on the lists you wish to update in the **Select AES Tables to Update** grid. The first two sets of codes are part of the **Carriers and Ports Database**; the **Product Codes** selection updates the **Export Codes Database** and the **License Types Database**, as well as the drop-down list of **Units of Measure** and **DDTC Exemption Numbers** that are part of the Product Database.

Click on the **Run Selected Updates** button to download and update the selected lists. A pop-up window will appear when the update is complete. You can then click **Close** to exit out of the updates screens.

Export Codes Database

This database comes preloaded with the latest set of export codes provided by the U.S. Census Bureau for use with the Automated Export System (AES). These export codes may be updated occasionally by the Census Bureau. You will be notified by the Bureau of any changes by email if you have registered as an Account Administrator at your company for AES.

Add
Click this button to add a new export code to the database.

Delete
To remove an existing export code from the database, highlight the name you wish to remove in the grid and then click on the **Delete** button.

Save
Click this button to save any changes you made to the database.

Close
Click this button to exit the **Export Codes Database**.

You'll find a complete list of all the export codes in the Appendix here.

License Types Database

This database comes preloaded with the latest set of export license codes provided by the U.S. Census Bureau for use with the Automated Export System (AES). These export license codes may be updated occasionally by the Census Bureau. You will be notified by the Bureau of any changes by email if you have registered as an Account Administrator at your company for AES.

Add
Click this button to add a new license type name and code to the database.

Delete
To remove an existing license type from the database, highlight the name you wish to remove in the grid and then click on the **Delete** button.

Save
Click this button to save any changes you made to the database.

Close
Click this button to exit the **License Types Database**.

You'll find a complete list of export license types in the Appendix here.

Package Types Database

This database stores your commonly used package types so you can use them on the Packing List screen without retyping the dimensions each time. Click **Add** and enter the **Description** you want to use for this package type. Enter the **Length**, **Width** and **Height** in inches. Click **Save**.

Miscellaneous Lists Database

This database stores user definable drop-down menus used on miscellaneous screens in EZ Start. These databases come preloaded with generic choices that the user may modify, delete or expand as necessary to match their company's export needs. The current set of lists include:

Inland Bill Received On
Provides options for the types of shipping container the goods are packed on or in and is used on the Inland Bill of Lading (both versions).

Inland Bill Received Quantity
Provides options for how the goods included in a shipment are accounted for and is used on the Inland Bill of Lading (both versions).

Shipment Log Items Database (Professional Only)

In order to ensure compliance with export regulations, the Bureau of Industry and Security (BIS) strongly recommends that companies create a written Export Compliance Program (ECP) that clearly outlines what steps your company needs to follow prior to every export shipment. The **Shipment Log** screen in **EZ Start** (see here) allows you to document that each step of your ECP plan is being followed.

The **Shipment Log Items Database** comes preloaded with seven tasks outlined in the sample ECP provided by BIS. You can add, modify or delete tasks stored in the **Shipment Log Items** database:

Add
Click this button to add a new task to the database.

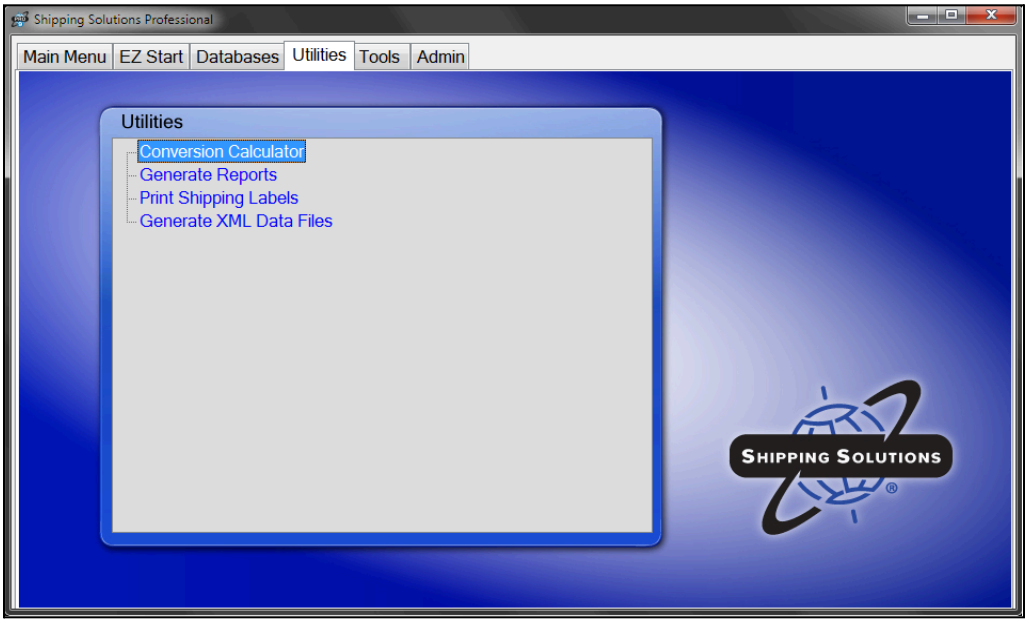
Delete
To remove an existing task from the database, highlight the task you wish to remove in the grid and then click on the **Delete** button.

Save
Click this button to save any changes you made to the database.

Close
Click this button to exit the **Shipment Log Items Database**.

Utilities Tab

The Utilities Tab in Shipping Solutions



Conversion Calculator

While many of the measurements used in the United States utilize imperial units, most of the rest of the world relies on the metric system. The Conversion Calculator allows you to convert a variety of measurements back and forth between the imperial and metric systems.

Select Unit of Measure
Click on the drop-down list to select the type of measurement you want to convert.

Decimal Places
Click on the drop-down list to choose how many decimal places to display in the results. The calculator will round up to whatever decimal place you choose.

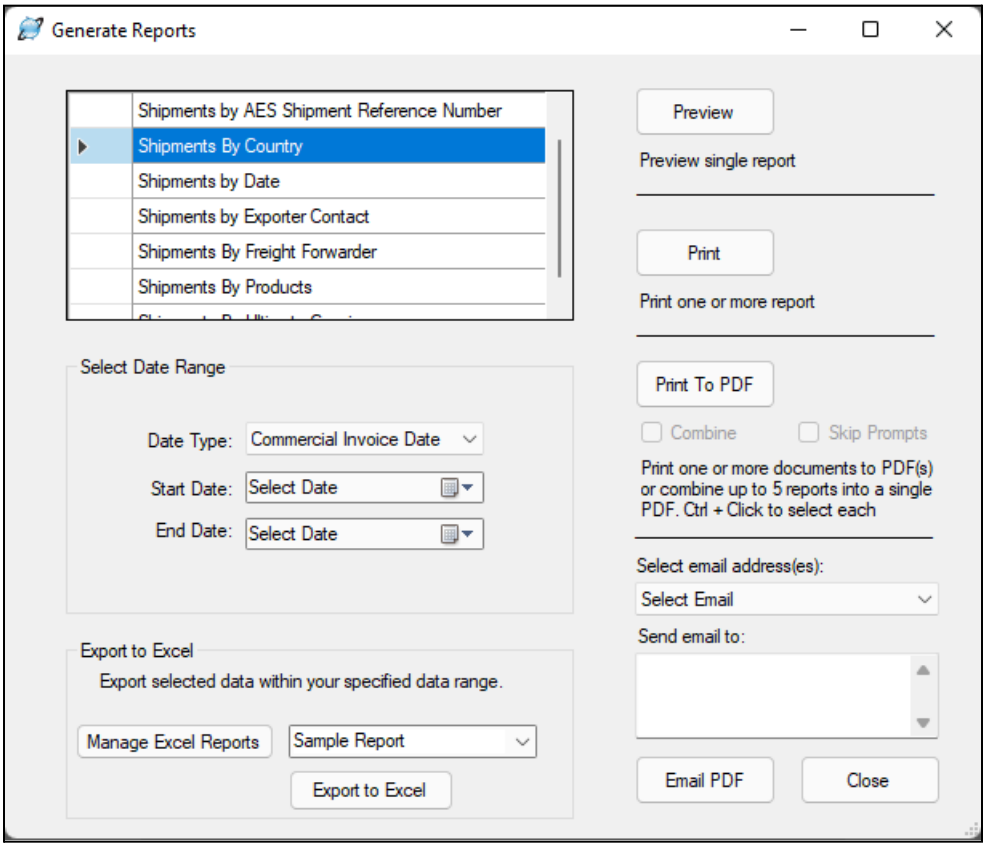
Highlight your choices in the list
Select the type of measure for which you know the value under **From** and the type of measure for which you want to convert under **To**.

Value to Convert
Enter the value you wish to convert.

Convert
Click this button to calculate the conversion for the value you entered.

Converted Value
The calculator will display the results of the conversion here.

Close
Click this button to close the calculator.



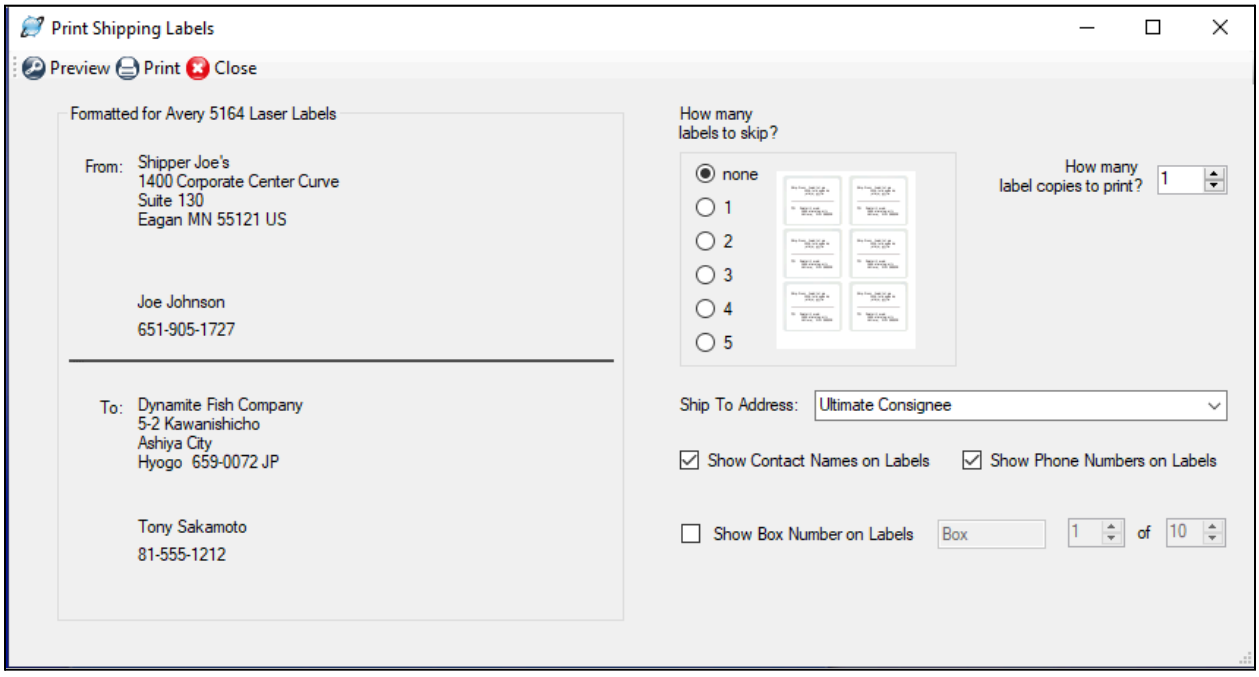
Generate Reports

This utility allows you to run reports showing shipments by AES shipment reference number, country, date, exporter contact, freight forwarder, products or ultimate consignee for a selected date range based on either the Commercial Invoice, EEI or Proforma Invoice date. You can also run a report showing the screenings run in the Export Compliance Module for a selected date range. Choose the report you want and enter the start and end date. The **Preview**, **Print**, **Print To PDF** and **Email PDF** buttons work the same way as they do in the **Preview/Print/Email** screen on **EZ Start**. (See here for more detail.)

The **Export to Excel** section of the screen will output all relevant shipment information for the date range selected to an Excel spreadsheet. It is not dependent on which report is chosen.

To start, click **Manage Excel Reports**. The initial report is named **Default**. Click the check boxes in the **Include** column to include a particular field in your report. To create additional reports, click **Add** and give the new report a name in the **Excel Report Name** box. Click on the name in the **Custom Field** name to rename the field in your report. You can drag and drop rows to change the order in which they will appear in your report. Click **Save** and **Close**.

To run the report, click the **Export to Excel** button. You will then be prompted to select a location on your computer for the report.



Print Shipping Labels

With Shipping Solutions, you can print standard shipping labels on Avery 5164 labels to place on your shipping packages. The **From** and **To** information on the labels automatically pulls from the **Exporter** and **Ultimate Consignee** information entered on the **EZ Start-Contacts** screen. However, you can use the **Ship To Address** drop-down list to change the **To** address to the **Intermediate Consignee** or **Bill To** record from the **EZ Start-Contacts** screen.

Rather than wasting labels whenever you need to print less than a full sheet, click the radio button indicating how many labels to skip. For example, if you want to print on a sheet of labels from which you've already used the top two labels, click the number 2 button, and printing will start with label number 3. You can also indicate how many labels to print.

The **Contact First Name**, **Last Name**, and **Phone Number** entered on the **EZ Start-Contacts** screen will print on the labels unless you uncheck the appropriate boxes. You can also show box numbers on the labels by checking the appropriate box and indicating the starting box number (generally 1) and ending box number.

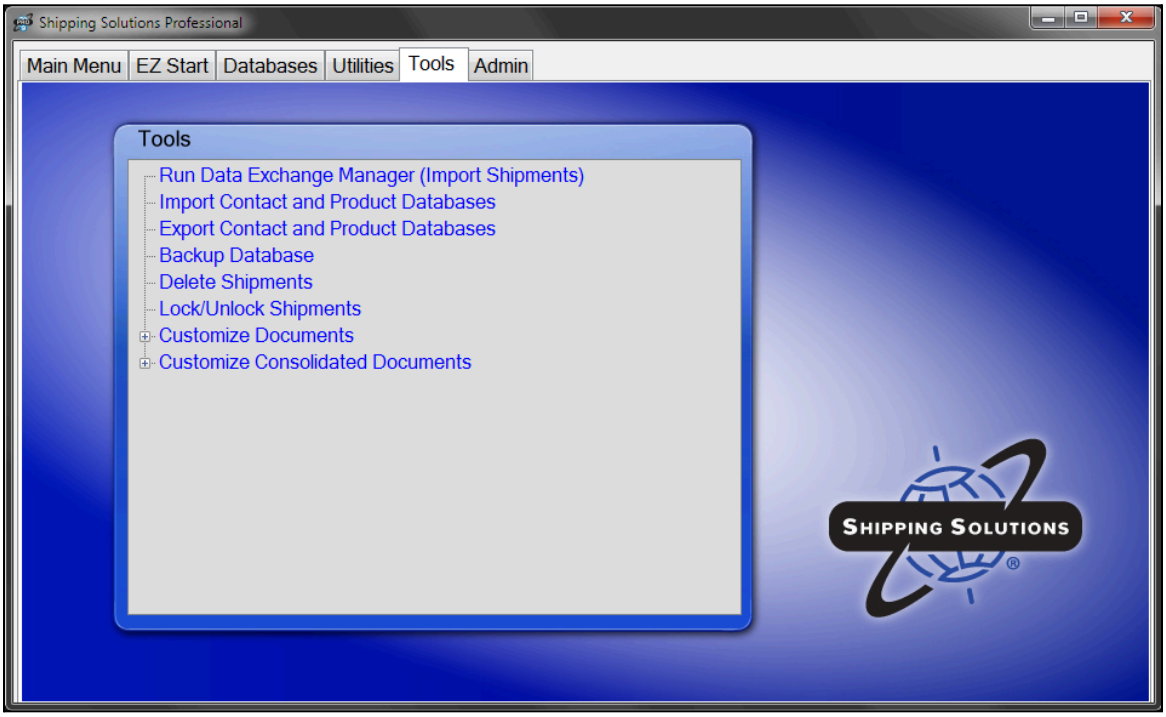
You can **Preview** and **Print** the labels from this screen.

Generate XML Data Files (Professional Only)

Here you can create an eDoc for filing a Canada Customs Invoice. Click **Generate eDoc File** and a **Save As** screen will open so you can indicate where to save the eDoc file.

Tools Tab

The Tools Tab in Shipping Solutions

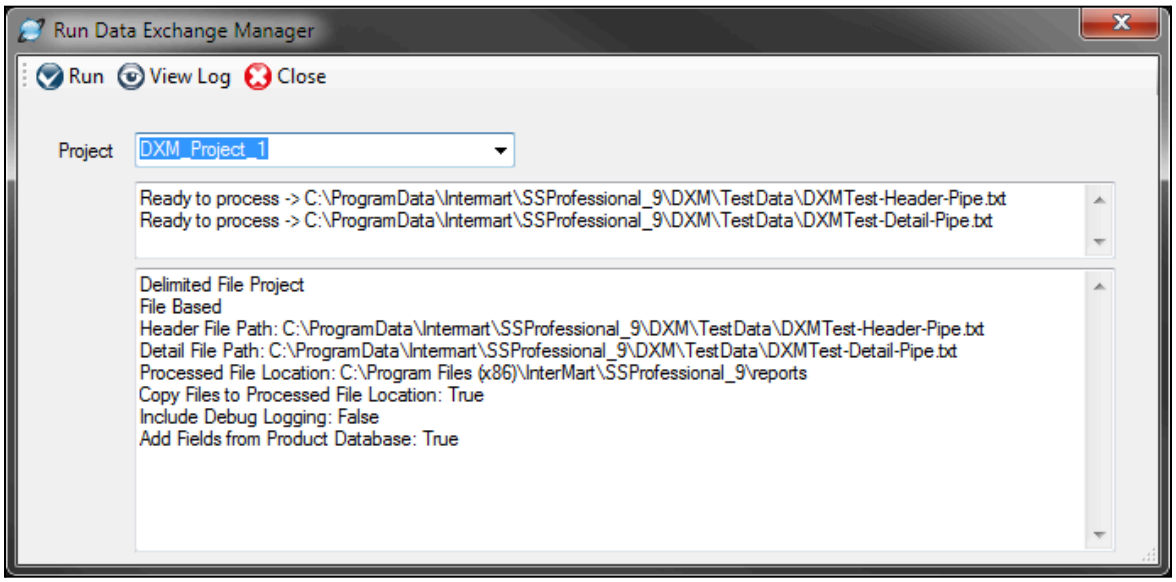


Run Data Exchange Manager (Import Shipments) (Professional Only)

Shipping Solutions Professional includes a **Data Exchange Manager** that allows you to import an entire order or a set of orders from your accounting system into Shipping Solutions to be able to produce your documents, file electronically through the Automated Export System (AES), and fulfill your export compliance responsibilities.

Before you can run the Data Exchange Manager (DXM), you must first set it up on the **Admin Tab** (see here). Once you have set up the DXM, you have three different ways you can run it: (1) manually; (2) from a script that calls the dxmRun.exe file, which will initiate the import process; or (3) as a Windows Service that runs on a schedule and imports files whenever they exist in a pre-determined folder and use the proper naming convention.

This screen on the **Tools** tab allows you to manually run the DXM to import an order into Shipping Solutions Professional. For more information about options #2 and #3, see the instructions here.



Selecting a Project to Import

When you click on the **Run Data Exchange Manager (Import Shipments)** screen on the **Tools** tab, a **Project** window opens, which allows you to select which project you wish to run. A project will be created when you configure the DXM following the instructions beginning here. While most companies will only create one project, some companies may create multiple projects if they wish to import orders from more than one accounting, order-entry or ERP system.

When you select your project from the **Project** drop-down list, the Run Data Exchange Manager window will tell you if there are either XML or delimited text files ready to process, or, if you select an ODBC project, a **Lookup ID** box will appear. Any other configuration settings you've chosen will also display. If you have selected a folder-based project, a **Process All Files** check box will appear. Check the box to process all the files without stopping.

If one or more files exist, click the **Run** button in the toolbar to import the order or orders. For ODBC projects, enter the **Lookup ID** and click **Run**. The value you enter here is defined in the setup wizard found on the **Admin** tab, **Setup Data Exchange Manager for ODBC** screen.

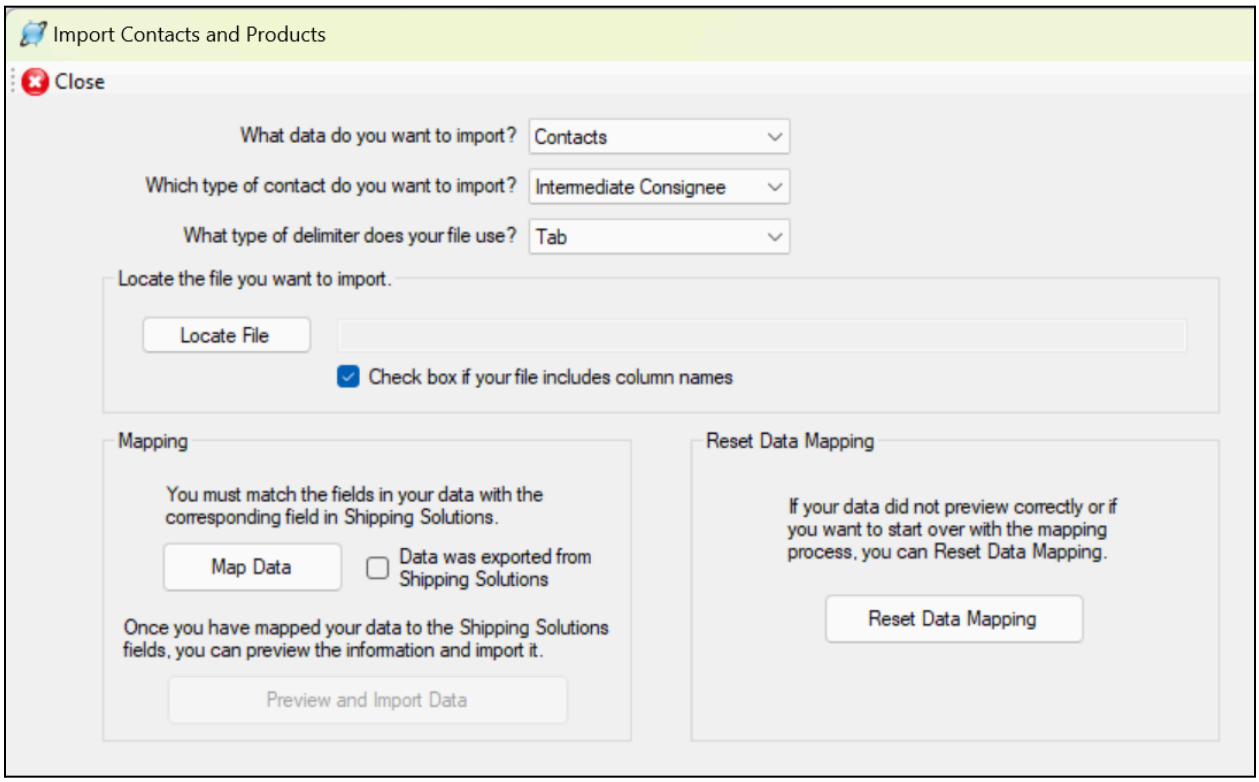
As the project runs, the bottom window will display the results of the import process and should end with "Shipment ID's Inserted [x]" where "x" is the Shipment Number inserted into your Shipping Solutions database. To see more details of this particular import as well as previous imports you've run, click on the **View Log** button on the toolbar.

To see your imported shipments, go to the **EZ Start** tab and click **Select Shipment**. The most recently imported shipments will be listed at the top.

If there are no files to import into Shipping Solutions, the top window will indicate that your designated folder is missing files to process.

Click **Close** to exit this window.

Import Contacts and Products Database Located on the Tools Tab



Import Contacts and Products Databases

A major benefit of using Shipping Solutions is to be able to store your customer and product information in the software's databases, so you don't have to type the addresses and product details over and over again. If you have the information in another source, such as an ERP system or Excel spreadsheet, you can import the information using this utility rather than typing the addresses and product details by hand.

You will need to get your data into a text file that is delimited by tabs, commas or pipes. Do not use a comma as your delimiter if your data also includes commas. This can be a problem when importing addresses or product descriptions. After you have prepared your data, follow the steps on the screen to import it into the Shipping Solutions database.

What data do you want to import?

Choose either **Contacts**, **Products,** or **Products Free Trade**.

Which type of contact do you want to import?

This drop-down menu only appears if you chose **Contacts** above. Choose which type of contact you want to import: exporter, ultimate consignee, intermediate consignee, freight forwarder, bill to or miscellaneous.

What type of delimiter does your file use?

You can choose pipe, comma or tab.

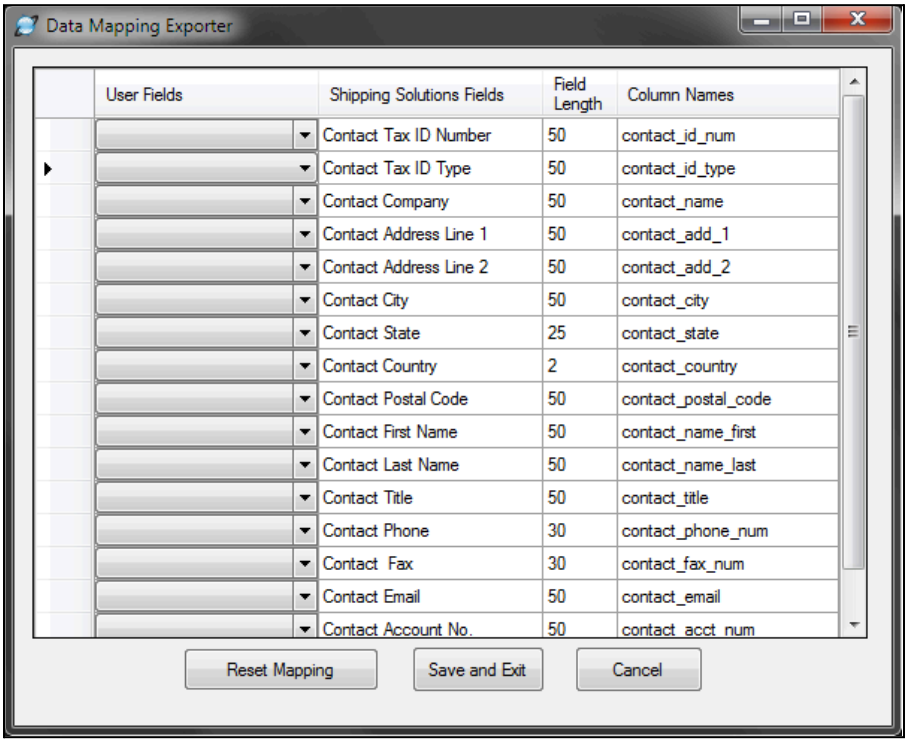
Locate the file you want to import

Click **Locate File** and navigate to the location of your pipe, comma or tab-delimited file.

Check box…column names

Check this box if the first column in your text file includes column names.

Mapping Data for Import into Shipping Solutions Databases



Map Data

Clicking this button will open a window that displays all of the Shipping Solutions field names, their lengths, and their system field names. In the **User Fields** column, use the drop-down arrow to see the fields in your file and select which fields correspond to the **Shipping Solutions Fields**. You do not have to map to all of the Shipping Solutions fields. Just map the fields that you have in your text files.

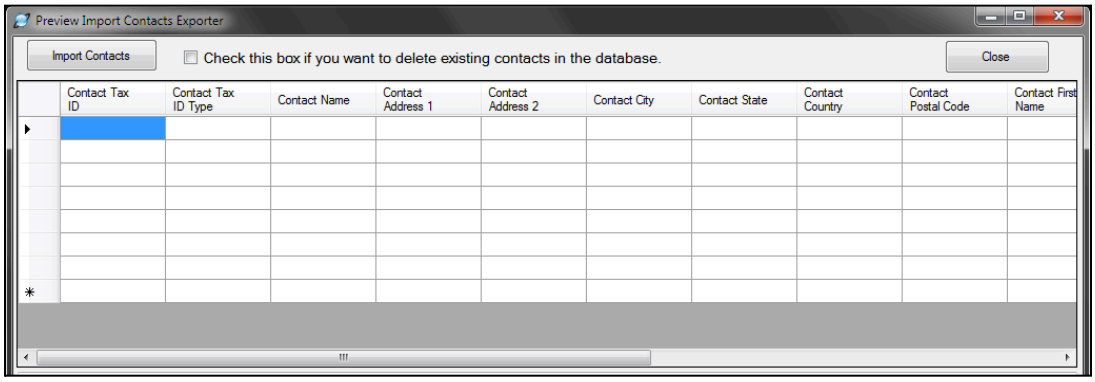
For a detailed list of all the data fields available in each of the databases, see the charts in the Appendix beginning here.

When you have finished mapping your data fields to the Shipping Solutions fields, click **Save and Exit**. To restart the mapping process, click the **Reset Mapping** button. To cancel the mapping process altogether, click the **Cancel** button.

Data was exported from Shipping Solutions

If you used the **Export Contact and Product Databases** feature to export your data (see here), and you didn't change the column names, you can check this box and skip the **Map Data** task. Be sure your file is saved as tab or pipe delimited if you have commas in your data fields.

Previewing Data Before Import into Shipping Solutions Databases



Preview and Import Data

Once you have mapped at least one field, this button will appear. Click on the button to view a grid with the data you are about to import. There is a check box to indicate whether you want to delete the existing items in the database. For **Contacts** and **Products**, leaving the box unchecked means the data will be appended to whatever is already in the database. For **Free Trade Products**, leaving the box unchecked means the existing rows for a product and agreement will be updated and new rows will be inserted. In all cases, checking the box will delete the existing data and replace it with the new data in the grid. Click **Import Contacts**.

Reset Data Mapping

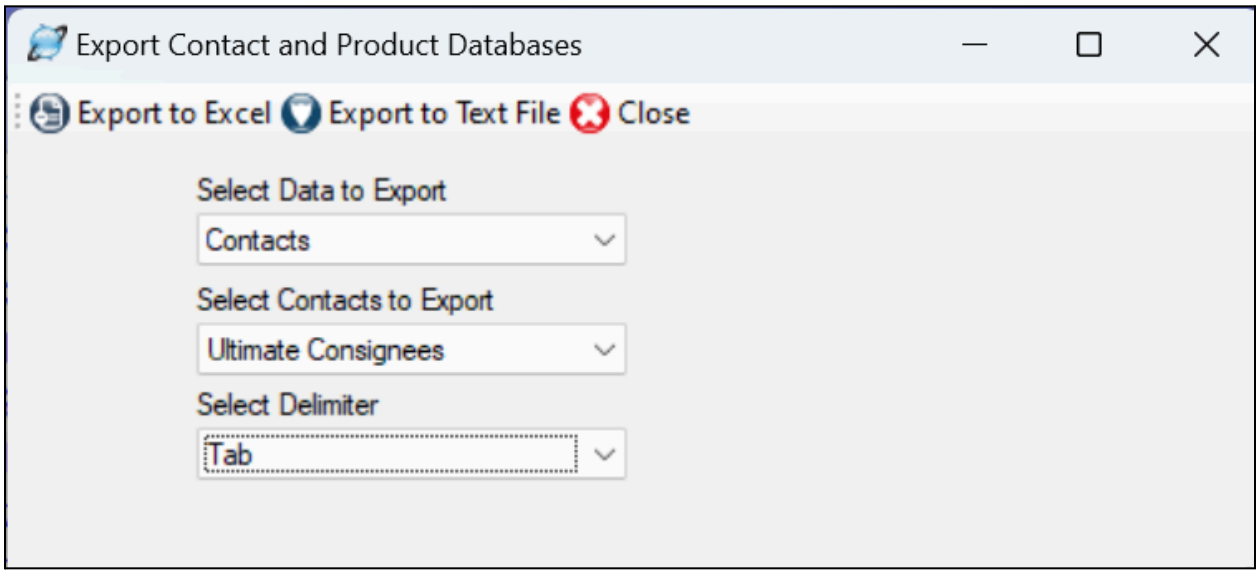
If you need to start over and want to clear all of your mapping, click this button.

Validate

Before you begin the setup process so you can import your contacts or products into the Shipping Solutions databases, you can validate that the files you wish to import don't include any formatting issues that will prevent them from importing correctly. Clicking this button opens a **Validate Text File** window where you can select the file you wish to scan.

Close

Click here to exit the **Import Contacts and Products Databases** window.



Export Contacts and Products Databases

To export the information you have entered into the various Shipping Solutions contacts and product databases into a comma, tab or pipe-delimited text file, click the **Export Contact and Product Databases** option on the **Tools** tab and follow these procedures:

Select Data to Export
Choose either **Contacts**, **Products** or **Products Free Trade**.

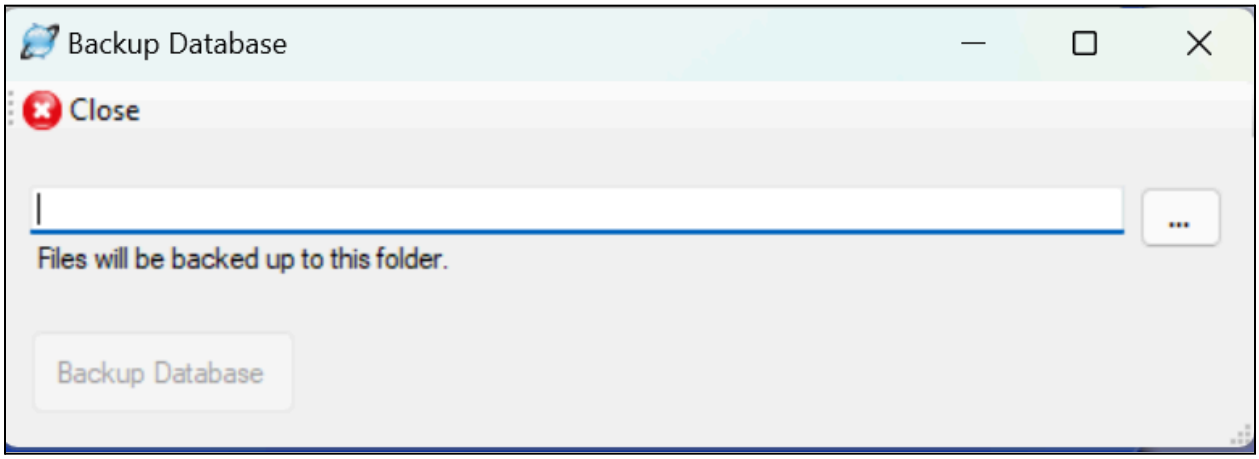
Select Contacts to Export
This drop-down menu only appears if you choose **Contacts** above. Choose which type of contact you want to export.

Select Delimiter
You can choose pipe, comma or tab. You don't need to select a delimiter when exporting to Excel. We recommend that you choose a pipe or tab delimiter since the comma delimiter won't work if you have commas in your data fields.

Export to Excel
Click this button and a **Save As** window will open where you can indicate where you want the data to be saved. The name defaults to the type of data being exported, but you can change it here.

Export to Text File
Click this button and a **Save As** window will open where you can indicate where you want the data to be saved. The name defaults to the type of data being exported, but you can change it here.

Close
Click this button to exit the **Export Contact and Product Databases** window.



Backup Database

Single-User Version

To create a backup of your Shipping Solutions database that is running on your computer, click **Select the Backup Location** and navigate to where you want the backup to be saved. Click **Backup Database** to create the backup. To restore a backup, follow the procedures below:

1. Navigate to C:\ProgramFiles(x86)\Intermart\SSProfessional_9\Applications\DBMaintenance and double on **DbRestore.exe**.
2. The **Database Restore Wizard** will open.
3. Enter the name of your computer (or simply a period (“.”)) and then **\SQLEXPRESS** in the SQL Server box. The period represents the name of your computer, and you can use a dot instead of typing in a name.
4. Click **Next**.
5. Click the box to navigate to the location of your backup file and click **Open**. In most cases you can click **Next**. In some cases, you will have to click the button next to SQL Server Authentication and enter a user name and password.
6. To restore over an existing database, click the **Existing Database** radio button, and choose the database you want to overwrite from the drop-down list. Proceed to step #8.
7. To restore with a new name, choose **New Database** and type in a new name for the database. Click the box to navigate to the location where you want the database restored.
8. Click **Next**.
9. In Shipping Solutions, go to the **Admin** tab and click **Set Database Connection**. Choose the restored database from the drop-down list and click **Test and Save**. You are now connected to the restored database.

Multi-User Version

If you have the multi-user version of Shipping Solutions, you will need to discuss back-up procedures with your database administrator. If the Shipping Solutions database (ssdata_sql_01) is housed on a company SQL Server, backup procedures are probably already in place.

If the database is on a shared computer running the SQL Express that we provided to you, you can use SQL Server Management Studio to back-up your database. On the computer running the database, click the **Start** button in the lower left corner of the computer, choose **All Programs** or **All Apps**, **Microsoft SQL Server 2008 R2**, and **SQL Server Management Studio**. Click the plus sign next to Databases, right click ssdata_sql_01, and choose **Tasks** and then **Backup**.

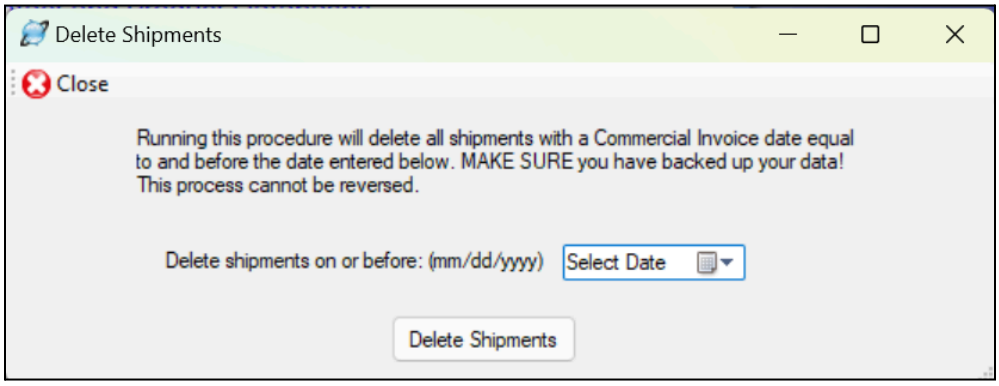
If you need to restore a backup, the process is the same except after choosing **Tasks**, choose **Restore** instead of **Backup**.

Delete Shipments

Shipping Solutions indefinitely stores all the shipment records you create in the software until you decide you want to delete them. For example, you may wish to delete a group of shipments once you are no longer required to keep them by the Export Administration Regulations, the International Traffic in Arms Regulations, and the Foreign Trade Regulations. Or perhaps you accidentally imported one or more orders from your company's ERP software, and you wish to delete them.

The software gives you two options for deleting those records.

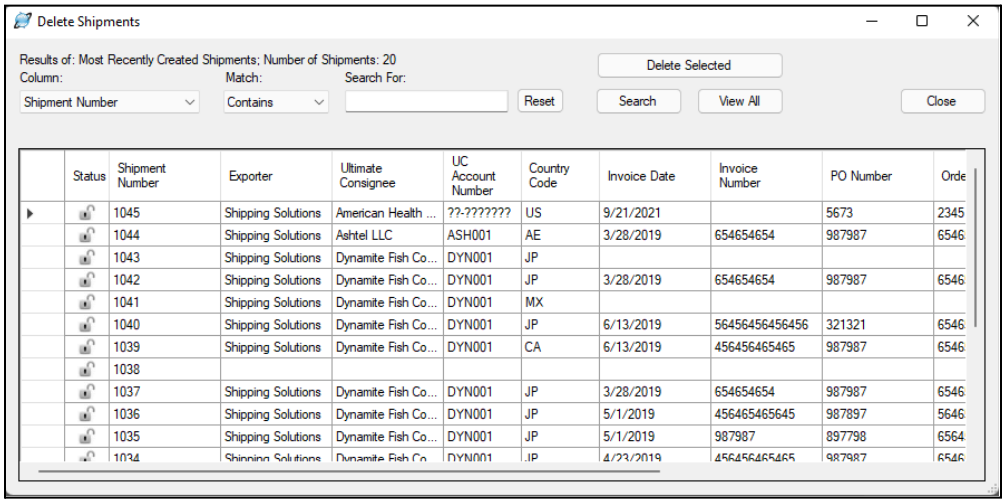
Delete Shipments by Commercial Invoice Date



By Commercial Invoice Date

Running this procedure will delete all shipments with a commercial invoice date equal to and before the date selected. Make sure to back up your data prior to running this procedure. To run choose the date and click **Delete Shipments**. This process cannot be reversed.

Selecting Specific Shipments to Delete

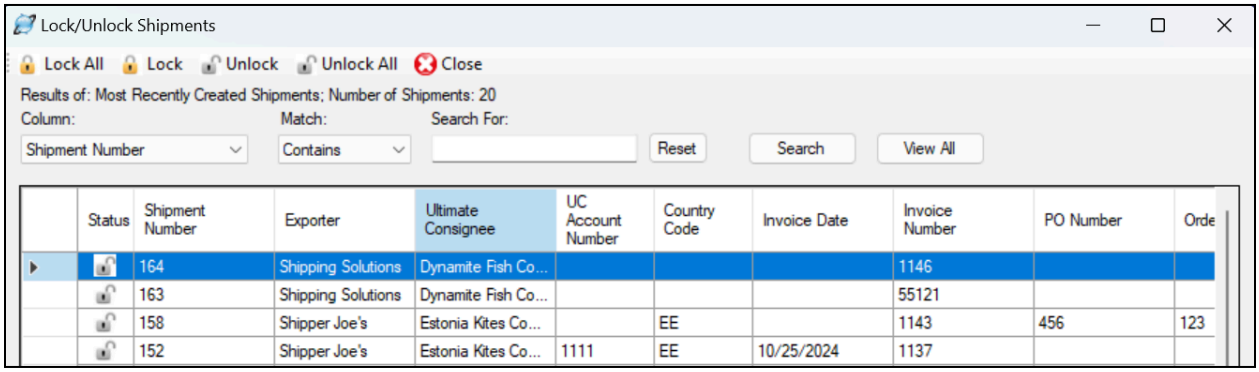


	Status	Shipment Number	Exporter	Ultimate Consignee	UC Account Number	Country Code	Invoice Date	Invoice Number	PO Number	Orde
▶		1045	Shipping Solutions	American Health ...	??-???????	US	9/21/2021		5673	2345
		1044	Shipping Solutions	Ashtel LLC	ASH001	AE	3/28/2019	654654654	987987	6546
		1043	Shipping Solutions	Dynamite Fish Co...	DYN001	JP				
		1042	Shipping Solutions	Dynamite Fish Co...	DYN001	JP	3/28/2019	654654654	987987	6546
		1041	Shipping Solutions	Dynamite Fish Co...	DYN001	MX				
		1040	Shipping Solutions	Dynamite Fish Co...	DYN001	JP	6/13/2019	56456456456456	321321	6546
		1039	Shipping Solutions	Dynamite Fish Co...	DYN001	CA	6/13/2019	456456465465	987987	6546
		1038								
		1037	Shipping Solutions	Dynamite Fish Co...	DYN001	JP	3/28/2019	654654654	987987	6546
		1036	Shipping Solutions	Dynamite Fish Co...	DYN001	JP	5/1/2019	456465465645	987897	5646
		1035	Shipping Solutions	Dynamite Fish Co...	DYN001	JP	5/1/2019	987987	897798	6564
		1034	Shipping Solutions	Dynamite Fish Co...	DYN001	JP	4/23/2019	456456465465	987987	6546

By Shipment Selection

This screen will delete selected shipments. You can search for shipments based on any number of columns. Hold the Control Key on your keyboard to select more than one individual shipment record or hold the Shift Key to select a group of shipments. Click **Delete Selected** to delete the highlighted shipments. This process cannot be reversed.

Lock or Unlock Shipments

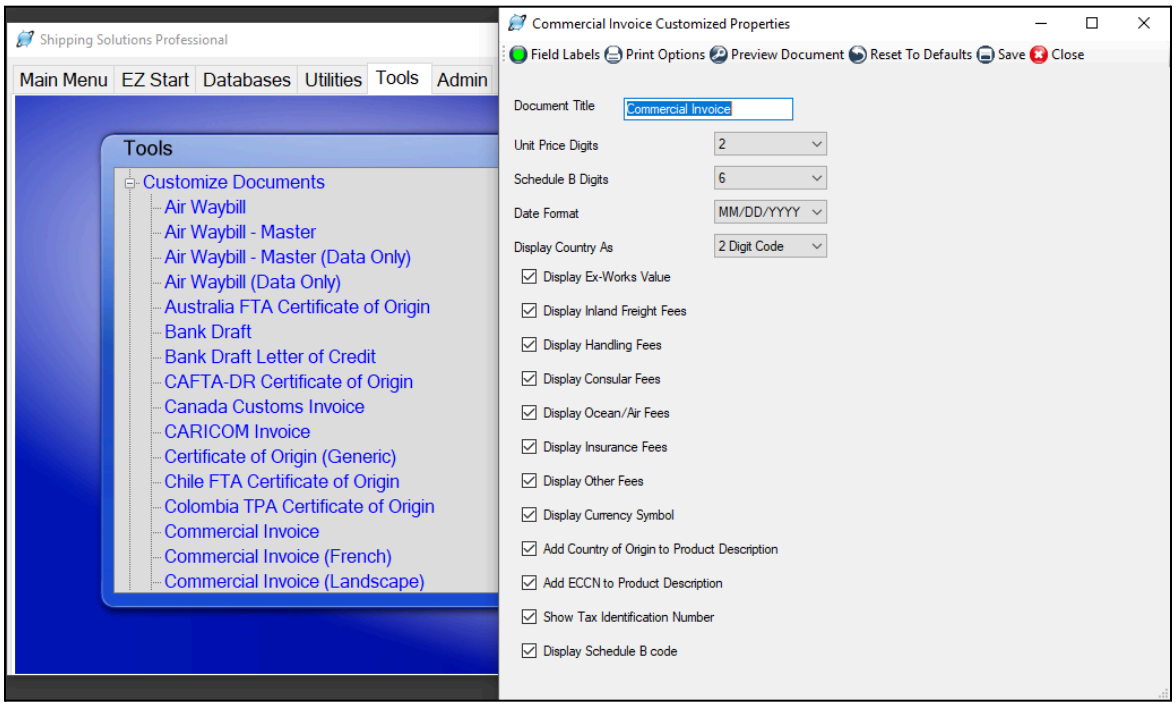


Lock/Unlock Shipments (Professional Only)

This screen allows you to lock or unlock a shipment. If a shipment is locked, users will only be able to preview/print/email documents or copy the shipment. A gold padlock icon will appear next to the shipment number to indicate that it is locked.

When you first open this screen, the last 20 shipments will be shown. Click **View All** to see all your shipments in the grid. To search for certain shipments, choose the field you want to search on in the **Column** drop-down list. Choose **Contains**, **Equals** or **Starts With** in the **Match** drop-down list and type what you are searching for in the **Search For** box. Then click **Search**. Clicking **Lock All** will lock all the shipments in the grid. Clicking **Lock** will lock only the highlighted shipment. **Unlock** and **Unlock All** work the same way.

The Customize Documents Screens



Customize Documents

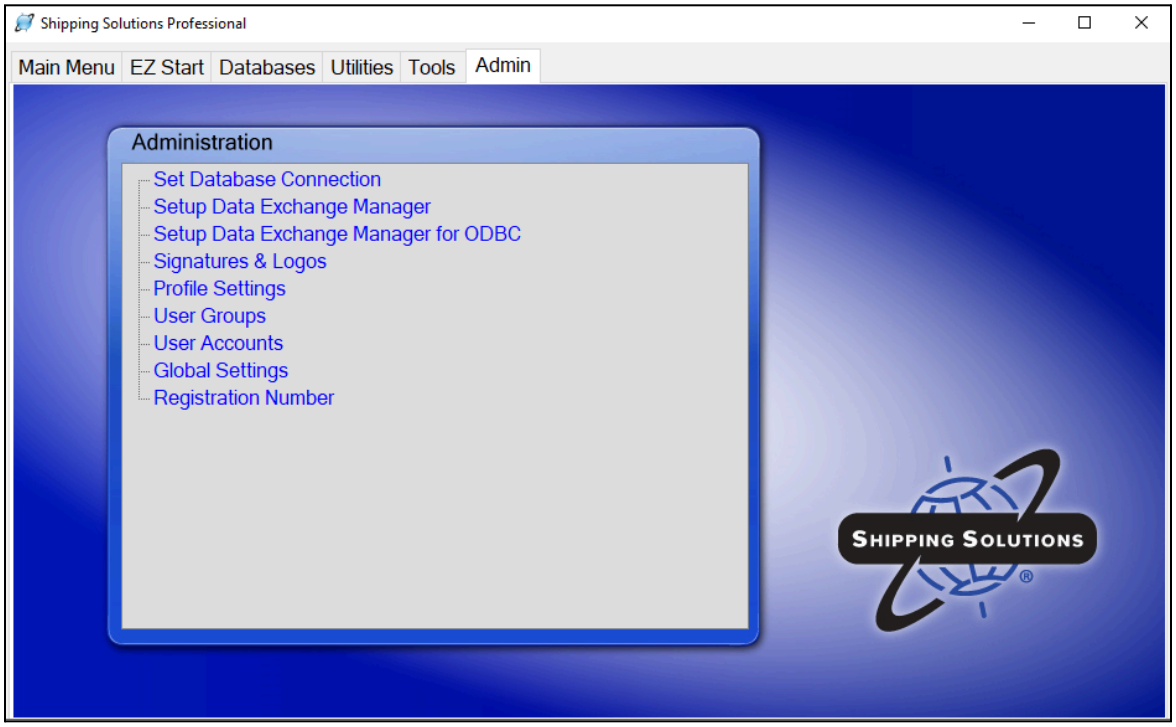
Click a particular form to see what is available to customize. On each form you can change the default printer and margins by clicking the **Print Options** button. On some forms you can change the field titles by clicking the **Field Labels** button. Some of the forms give you the option to change the document title, the number of Schedule B digits, the date format, the number of unit price digits and more. Click **Preview Document** to see your changes right away. You can also print documents for the current shipment from the preview screen, but these customizations will also be in effect when printing from the **Preview/Print/Email** button on **EZ Start**. The **Reset to Defaults** button will restore the form to its original settings. To save your changes to any form, click **Save** and then **Close**.

Customize Consolidated Documents (Professional Only)

This works the same way as **Customize Documents** except you are customizing the consolidated versions of the forms. These versions are printed via the **Consolidate** button on **EZ Start** (see here).

Admin Tab

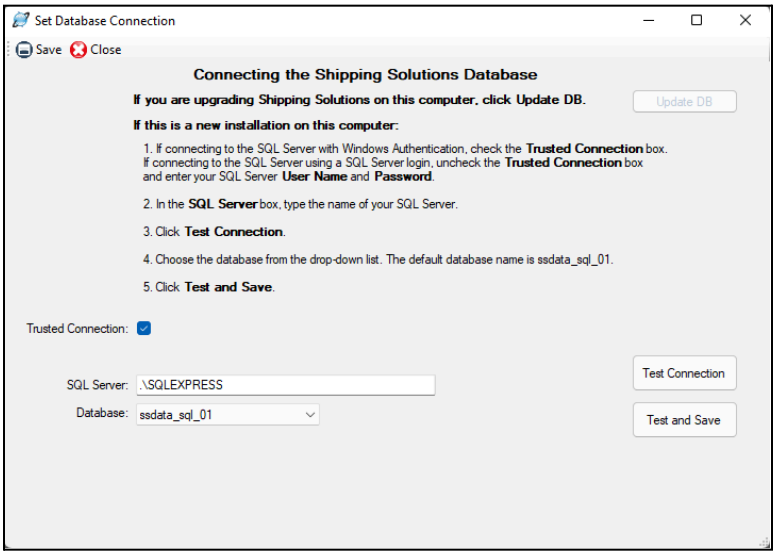
The Admin Tab in Shipping Solutions



Set Database Connection

Here is where the connection is made to your Shipping Solutions database. Shipping Solutions requires a SQL Express database to store your shipment information. Follow the instructions on the screen to connect to or upgrade your database.

The Set Database Connection Screen



If you have the single user version of Shipping Solutions, the installation will create and fill in your **SQL Server** name, which is **Your Computer Name\SQLEXPRESS**. It will also connect you to and fill in the **Database** name, which is **ssdata_sql_01**. The **Trusted Connection** box will be checked.

If you have the multi-user version of Shipping Solutions and your company has its own SQL server, you can copy the database, **ssdata_sql_01**, to your SQL server and connect to it there. The process is explained here.

If you have the multi-user version of Shipping Solutions and you do not have or don't want to use your company's existing SQL server, you can install SQLEXPRESS on a shared computer and then connect each user to the database. The entire installation process is explained starting on here. Once the multi-user version is correctly installed, the **SQL Server** name will be **Name of Server Computer\SQLEXPRESS,** and the **Database** name will be **ssdata_sql_01.** If you are using Windows Integrated Security, the **Trusted Connection** box will be checked. If you are using SQL Server security, the **Trusted Connection** box will not be checked, and the **User Name** and **Password** that you created during the installation process will be filled in. If you want the User Name and Password encrypted in the connections.config file, check the **Encrypt** box.

Shipping Solutions can host the SQL database for you on a Microsoft Azure SQL Server in a cloud environment. There is an additional fee for this hosting service except for Enterprise customers. Contact us at **888-890-7447** to set up the cloud hosting of your database. If you choose cloud hosting, we will provide you with the name of the SQL server and database.

Setup Data Exchange Manager (Professional Only)

Shipping Solutions Professional includes a Data Exchange Manager (DXM) that allows you to import orders from your company's accounting, order-entry or ERP system into Shipping Solutions Professional and produce your export documents, file your export information electronically through the Automated Export System (AES), and fulfill your export compliance requirements.

There are three primary advantages of using the DXM:

1. Dramatically reduce the time it takes to complete your export documents. By importing one or more orders into Shipping Solutions Professional, a company may import almost all of the data required to complete the various export forms.
2. Eliminate redundant databases. Because you are importing an entire order or orders into Shipping Solutions Professional, you are typically importing all the contact and product information from your company's system. This eliminates the need to import, store and update your contact and product information in the Shipping Solutions databases. Since most accounting, order-entry and ERP systems don't allow you to store intermediate consignee and freight forwarder information, you may still find it advantageous to use those databases in Shipping Solutions Professional.
3. Reduce data-entry errors. Because you are importing data from your company's system, you don't need to retype important information. No retyping means no chance of new typos.

There are three primary ways the DXM can be used:

1. File-based processing requires that you configure your accounting, order-entry or ERP system to generate a single XML file with a specific file name or matching header and detail delimited text files with specific file names. This file or matching files will include one or more orders and can be saved in a specific location that you specify. Whenever you then run the DXM either manually or automatically, it will grab the order information and automatically insert it as a new shipment record or shipment records in Shipping Solutions Professional. At this point you can review the imported data, enter any missing data or change any data that needs to be changed, and then create your export documents, file through AES, and run your export compliance screenings.

2. Folder-based processing allows you to identify a specific folder that the DXM will monitor and, when the DXM is triggered, it will check the folder and import the order information from the single XML file or the matching delimited text files. When you manually or automatically run the DXM, it will grab the order information and insert it as a new shipment record or shipments records in Shipping Solutions Professional.

3. A SQL Server ODBC connection allows Shipping Solutions to directly communicate with your business application such as your accounting, order-entry, or ERP system. This method is discussed in detail starting here.

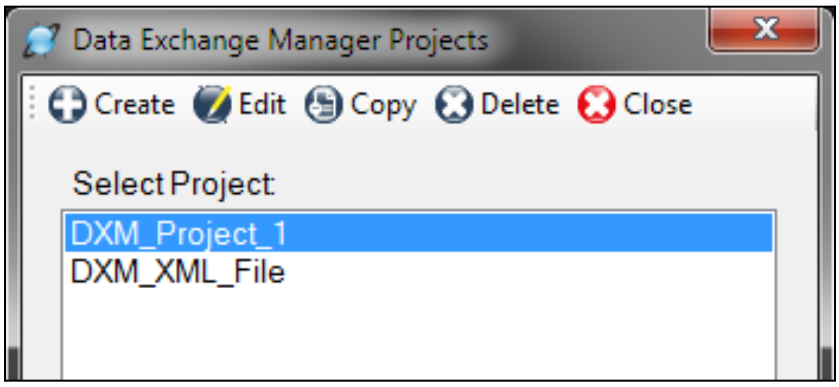
Finally, there are three different ways you can run the DXM:

1. You can run the DXM by going to the Shipping Solutions Professional **Tools** tab and clicking on the **Run Data Exchange Manager (Import Shipments)** screen. See the instructions for running the DXM here. This is the only method you can use with an ODBC connection.

2. You can run the DXM from a script that calls the **dxmRun.exe** file, which will initiate the import process. This script could be used to generate the XML file or delimited text files from your accounting or ERP system and then call dxmRun.exe at the end of that process, or it could be part of some other process your company uses.

3. You can create a Windows Service that runs on a schedule and checks the folder you specified in the folder-based processing described above so that whenever a file or files exist in the folder with the proper naming convention, they will be imported into Shipping Solutions Professional.

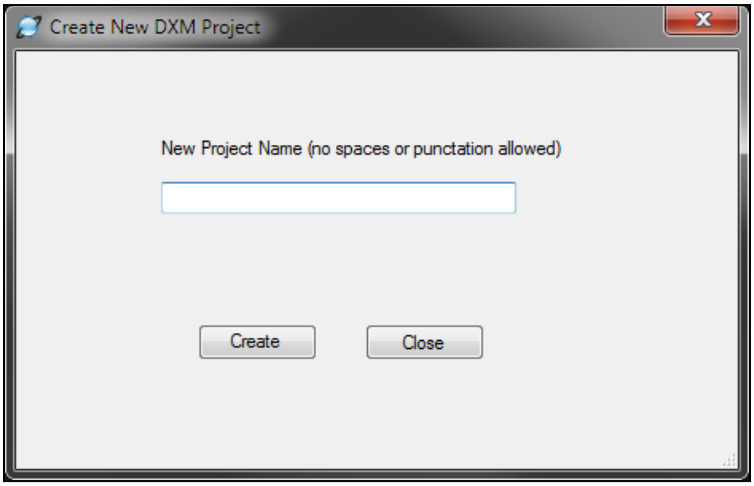
Setting Up the DXM Starts by Creating or Editing a Project



Configuring the Data Exchange Manager

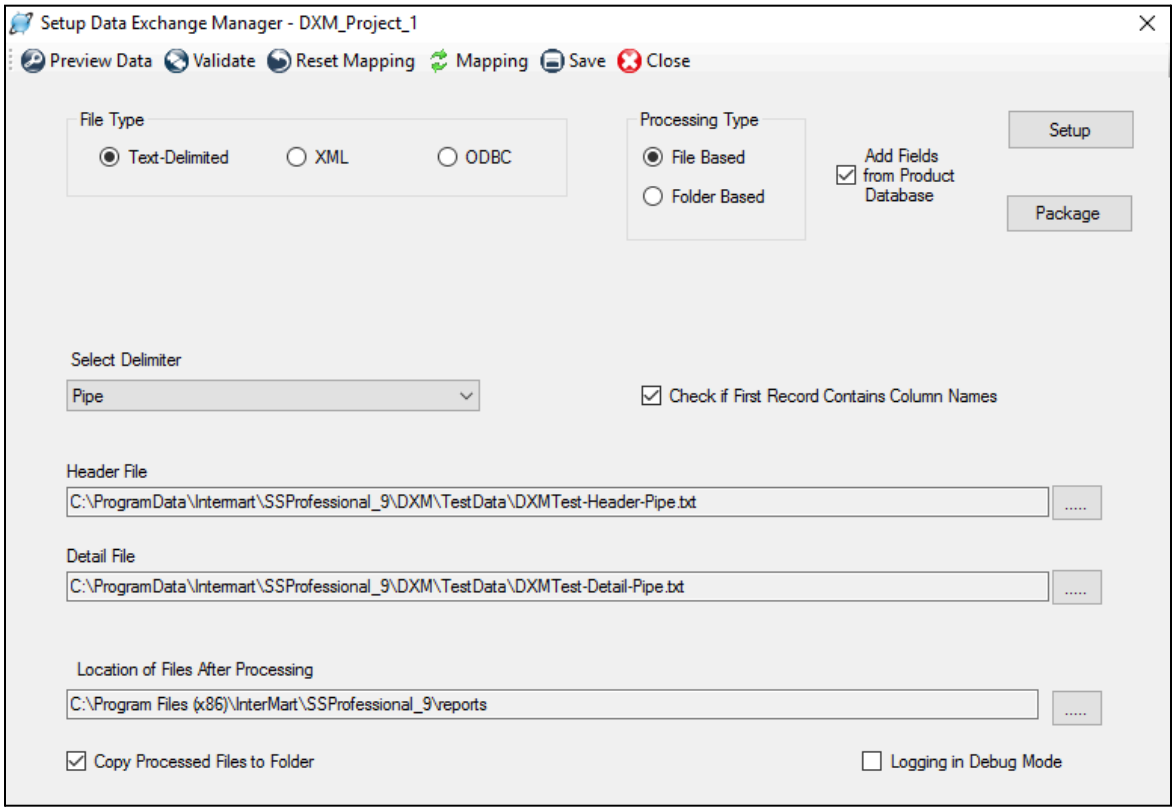
Before you can utilize the DXM, you must first configure it to work with your accounting, order-entry or ERP system. Begin by going to the **Admin** tab in Shipping Solutions Professional and clicking on **Setup Data Exchange Manager**. From here you can choose to create a new project by clicking on **Create** on the program's toolbar, or you can choose an existing project from the **Select Project** list. You can create as many different projects as you need, so you can import data from multiple sources if you wish.

Create New Project Screen



If you choose to create a new project, the **Create New DXM Project** window will open. Enter a name for this project without any spaces or punctuation, and click the **Create** button.

Regardless of whether you have decided to create a new project or use an existing project, select that project from the **Select Project** list and click on the **Edit** button. This will open the **Setup Data Exchange Manager** window for this project.



As mentioned above, you can choose to import data from your accounting or ERP system into the Shipping Solutions Professional software using comma-, tab- or pipe-delimited text files, using an XML file, or using a SQL Server ODBC connection. In the **File Type** box, choose **Text-Delimited, XML**, or **ODBC**.

Next choose your **Processing Type**. Choose either File Based or Folder Based. When using a SQL Server ODBC connection, the only option is File Based. The File Based processing type requires that you generate an XML file with a specific name or two delimited text files (a header and a detail file) with specific names. The DXM allows you to process one file at a time (or one header/detail pair if you're working with text-delimited files) or all the files in one folder. To process one file, choose **File Based**. To process all files in a folder, choose **Folder Based**.

Continue following the setup instructions below depending on which file type you have chosen. Skip ahead to the section titled **Use XML Files** if you are using that option. Skip ahead to the section titled **Use an ODBC Connection** if you are using that option.

Use Text-Delimited Files

In order to import your orders into Shipping Solutions Professional using text delimited files, you need to create two files from your accounting or ERP system: the header file and the detail file. The header file contains all the information that applies to your entire shipment including exporter, consignee and shipping information. The detail file includes information related to each separate line item of your order. Every order can have multiple line items.

Both the header and detail files must have a linking field that ensures that the line items for an order will always stay tied to that order. The linking field must be the first column in both the header and detail file. If you have field titles, the title of the linking field must be the same in both the header and detail file. Possible options for the linking field include the invoice number or the shipment number. The field used as the linking field can also be used for another field. For example, if you use the invoice number as the linking field, you can still also map it to the invoice number field in the header file.

The Appendix shows the fields available to import and whether they are in the header or detail text file. It also shows the acceptable format for each field.

There are hundreds of fields available to import, but at a minimum, you will want to include the following fields from your ERP system in your header text file:

Linking field
Use a number that identifies this shipment and can be used to link the header record to the line items in the line item detail file. Companies often use Commercial Invoice Number, Order Number or PO Number. This should be the first column in the header file. This field can also be mapped to its appropriate field. Mapping is discussed later in this section.

Exporter Company Name, Address1, Address2, City, State, Zip and Country
If you are the exporter, this would be your company name and address. States and countries must be two-character codes. For example, if your company is located in Minnesota, you would need to show the state as MN and the country as US. If your company name and address are not available in your ERP system, you can type the Exporter name and address as default values on the Mapping screen when you get to that part of the setup.

Ultimate Consignee Company Name, Address1, Address2, City, Postal Code, and Country
This is the customer that is the ultimate destination for your goods. Just like with the exporter record, the country code must be two characters.

Date
Include a date for this shipment such as Proforma Invoice Date, Commercial Invoice Date or Date of Export. Date fields must use the MM/DD/YYYY, YYYY/MM/DD or YYYY-MM-DD format.

At a minimum, you will want to include the following fields from your ERP system in your line item detail text file:

Linking field
Use a number that identifies the shipment that the line item belongs to. This should be the first column in the line item detail file and will link the line items to the header record in the header file. Companies often use Commercial Invoice Number, Order Number or PO Number as the identifying field. Since a shipment can have many line items, each line item must have this field as the first column of the record.

Product ID
Some companies do not have Product IDs for their items, so it is not a required field. However, if you have one, it should be included to identify the product as well as to make use of the Product Supplement, which is described here.

Product Description
This is the name of your item. It can be mapped to both the Product Description and Schedule B description, although Schedule B descriptions are generally more generic than Product Descriptions.

Quantity
This is the number of a particular item included on this shipment. Map the quantity to both the Quantity for Invoice and Quantity for Packing List fields.

Sales Unit of Measure
This is the unit of measure that you use to sell your item such as piece, box, etc.

Unit Price
This is the price per item.

Extended Price
This is the Quantity multiplied by the Unit Price. If you don't map the Extended Price, then the user will have to tab through the quantity and price in Shipping Solutions to get the extended price to calculate. If your shipments have many line items, this is a time-consuming task.

If you are using folder-based processing, it's very important you pay close attention to how the files are named. Either the prefix or the suffix of the name must designate whether it is a header or detail file. The rest of the file name must be identical for both file types; for example, **NewOrder_Header.txt** and **NewOrder_Detail.txt**.

Once you have created the header and detail text files from your accounting or ERP system, you can test the files to ensure they will work with the DXM by using the testing tools included with the software. See the section titled **DXM Testing Tools** for instructions on running the **Text File Validator**.

Once you have created your two text files and confirmed they will work with the DXM, complete the Setup screen as described below:

File Type
Since this is a text-delimited project, click the **Text Delimited** button.

Processing Type
The DXM allows you to process one set of header and detail files or all the sets of files in a certain folder. If you will only have one header and detail file to process at a time, choose **File Based**. If you want all the properly named files in a specified folder to be processed, choose **Folder Based**.

Add Fields from Product Database
If you want to supplement the data you are importing from your accounting or ERP system, check this box. Click **Setup** to designate the fields you wish to supplement. See **Supplement Data from the Product Database** for more information.

Package
If you want to zip up the DXM files to be run on a different computer, click **Package** and identify the location where you wish to save the zip file. This should be done after the setup is complete and fully tested.

Select Delimiter
Select the type of delimiter that divides your data fields: comma, tab or pipe. Tab or pipe delimiters are recommended especially if your data has commas, which will cause the DXM to misread your data.

Check if First Record Contains Column Names
Check this box if you have column names in your header and detail files. Column names are recommended to make the data mapping process easier.

Header File (File Based only)
Click on the ellipsis button to display a search window that will allow you to navigate through your computer to locate the header file of your shipment. Once you have located it, click on the file and then click **Open** to select it.

Detail File (File Based only)
Click the ellipsis button to display a search window that will allow you to navigate through your computer to locate the detail file of your shipment. Once you have located it, click on the file and then click **Open** to select it.

Source Folder (Folder Based only)
Click the ellipsis button and locate the folder containing the text files to be processed.

File Part (Folder Based only)
In order for the DXM to know which files contain header information and which files contain detail information, you need to specify the file naming convention you are using. Click either **Prefix** or **Suffix** depending on which part of the file name is used and enter the prefix or suffix in the **Header File Part** box and **Detail File Part** box. For example, if all header files begin "Header" enter "Header" in the Header File Part box.

Location of Files After Processing

Click the ellipsis button to display a search window that will allow you to navigate through your computer to identify where you would like your text files to be moved after the DXM runs. When moved the processed files will be renamed with the file format YYYYMMDD_HHMMSSXX<filename> where XX is either AM or PM.

Copy Processed Files to Folder

When you are first setting up a DXM project, you may need to run the import of the delimited text files more than once to ensure the mapping and other configurations are correct. To make this process easier, you should leave this box unchecked so the files you are using to test the import stay in the designated folder. Once your testing is complete, and you are ready to move to the production phase, check this box so the processed files automatically get moved to the folder identified in Step 11, listed above. For folder-based projects, the box is always checked.

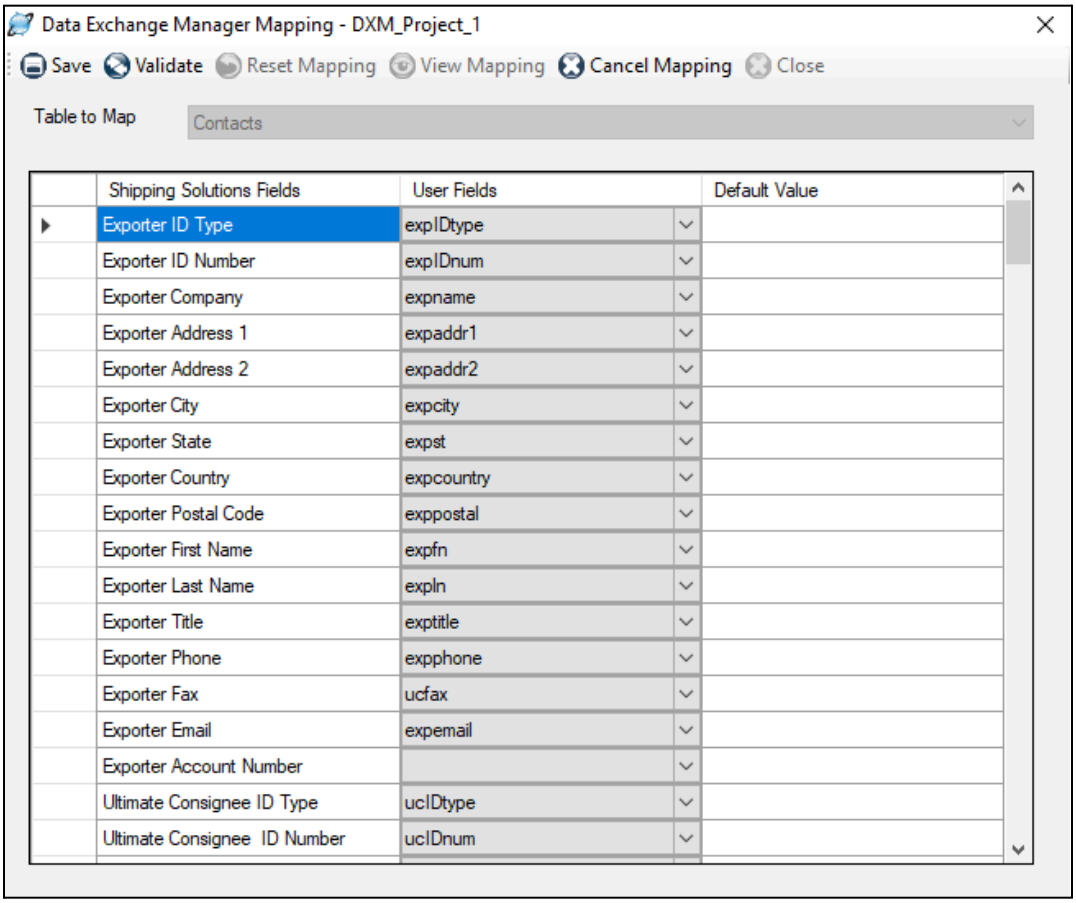
Logging in Debug Mode

Check this box if you are testing the import process and you want the DXM to write a more detailed log for the file import. The more detailed log may make it easier to diagnose any problems you encounter during the setup process.

You must now map the fields in your text files to the fields in Shipping Solutions Professional. For a detailed list of all the fields available for mapping, go to the **Data Exchange Manager File Structure** pages located in the Appendix.

If you already have mapping in place and have changed the text files significantly or just want to start over with your mapping, click **Reset Mapping**. This will wipe out all the mapping, so only click this button if you are sure you want to start over. To begin or continue the mapping process click **Mapping**.

Mapping Data Fields Using the Data Exchange Manager



The Shipping Solutions fields are divided into six tables. Begin by highlighting **Contacts** in the **Table to Map** drop-down list. The Shipping Solutions fields are listed in the left column.

Click on the drop-down list in the middle column. You should see your column headings from your header file. If you do not have column headings, the fields will appear as A0, A1, A2, etc. For each Shipping Solutions field choose the corresponding field in your text file from the drop-down list. You do not need to map every field; only map the fields for which you have data.

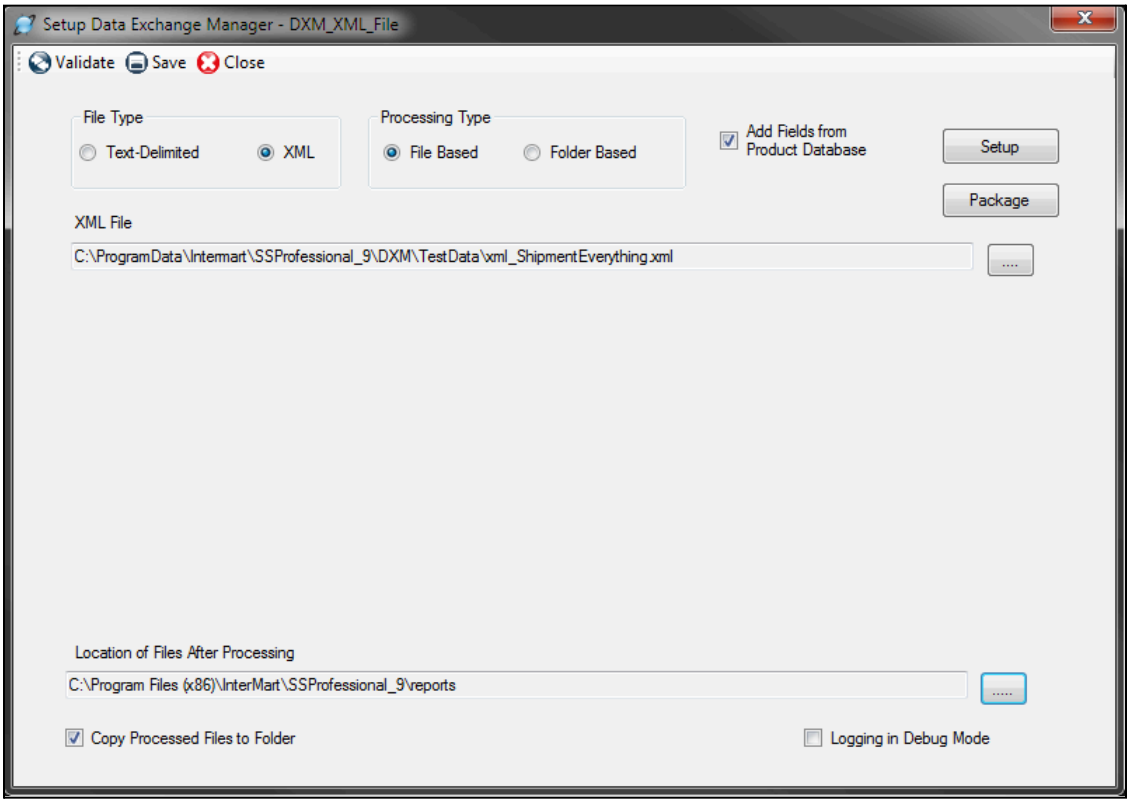
The right column can be used to enter a Default Value for a field. That default value will be used for every shipment pulled in using this DXM project.

Once you have finished selecting the correct User Fields and entering any Default Values you want to use, click **Save**. You must move off a mapped field before saving in order for that field to be saved. If you want to exit the data mapping screen without saving your changes, click **Cancel Mapping**.

Next select the **Header-Invoice** table and repeat the process. Continue down the list of tables mapping all the information you have in your header and detail text files and entering any default values. You do not have to map all of the tables. Click **View Mapping** to view or print a list of the fields you have mapped. Click **View All Fields** to see all fields available for mapping, and then click **View Mapped Fields** to see just what you've mapped.

Click **Close** to close the Data Mapping screen.

Because you are using text-delimited files with the DXM, you can skip the next section and proceed to Supplement Data from the Product Database section.



Use XML Files

Working with the XML data format in the Data Exchange Manager greatly simplifies the process of moving data from your accounting or ERP system into Shipping Solutions Professional. However, it does require that the files conform to the schema provided with the software.

The schema can be found in the **c:\Program Data\InterMart\SSProfessional_9\DXM\schemas** folder. The **ssdataDXMschema_09.xsd** schema provides XML structure validation and validation of elements to correspond to the database's expected data types, and in some cases, the fields' allowed values. You can also see the list of available fields and other information in the Data Exchange Manager file structure here.

If you look at the schema, you will see that the following tables are required: tbl_doc_header, tbl_document_contacts, and tbl_item_details. The other tables are optional. The tables must be in the order that they appear in the schema, but the elements within the tables can be in any order. None of the elements are required.

There are hundreds of fields available to import, but at a minimum you will want to include the following fields from your ERP system in your XML file:

Exporter Company Name, Address1, Address2, City, State, Zip and Country

If you are the exporter, this would be your company name and address. These fields would be identified as contact_type "EX" in the XML file. States (contact_state) and countries (contact_country) must be two-character codes. For example, if your company is located in Minnesota, you would need to show the state as MN and the country as US. If your company name and address are not available in your ERP system, you can programmatically add those as default values in your XML file.

Ultimate Consignee Company Name, Address1, Address2, City, Postal Code, and Country
This is the customer that is the ultimate destination for your goods. These fields would be identified as contact_type "UC" in the XML file. Just like with the exporter record, the country (contact_country) must be two characters.

Date
Include a date for this shipment such as Proforma Invoice Date (proforma_inv_date), Commercial Invoice Date (comm_inv_date) or Date of Export (date_of_export). Date fields must use the YYYY-MM-DD format.

Product ID (prod_id)
Some companies do not have Product IDs for their items, so it is not a required field. However, if you have one, it should be included to identify the product as well as to make use of the Product Supplement, which is described here.

Product Description (prod_desc)
This is the name of your item. It can be mapped to both the Product Description and Schedule B description, although Schedule B descriptions are generally more generic than Product Descriptions.

Quantity for Invoice (quantity)
This is the number of a particular item included on this shipment.

Sales Unit of Measure (sales_unit_of_measure)
This is the unit of measure that you use to sell your item such as piece, box, etc.

Unit Price (unit_price)
This is the price per item.

Extended Price (ext_price)
This is the Quantity multiplied by the Unit Price. If you don't map the Extended Price, then the Shipping Solutions user will have to tab through the quantity and price to get the extended price to calculate. If your shipments have many line items, this is a time-consuming task.

The docsets element must define the schema location and namespace as shown below.

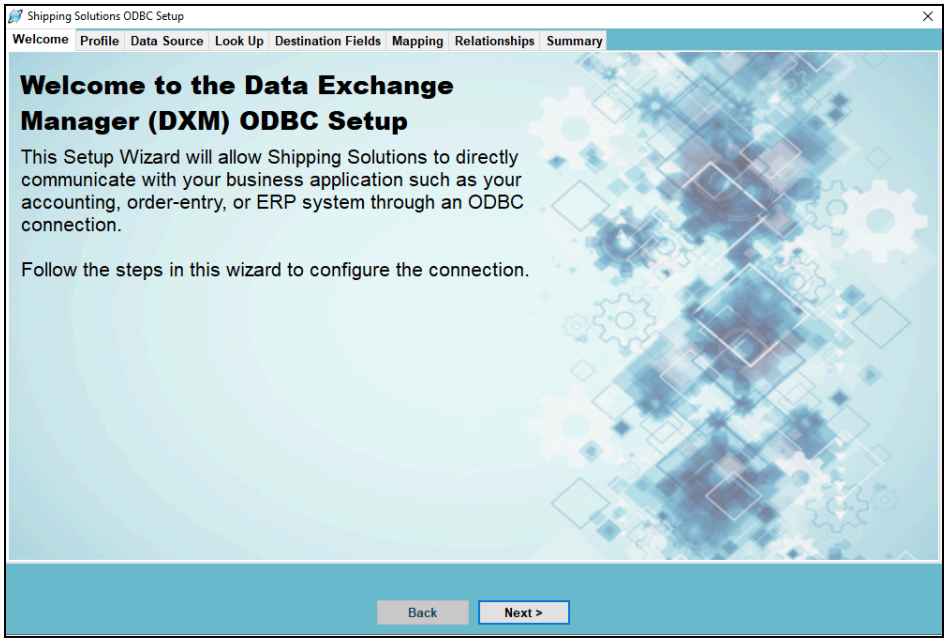
XML Header Info
```
<?xml version="1.0" encoding="utf-8"?>
<docsets xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
                xmlns="urn:SsproNamespace"
                xsi:schemaLocation="urn:SsproNamespace ssdataDXMschema_09.xsd">
<docset>
        Your Document XML as defined by the schema.
<docset>
</docsets>
```

Once you have created your XML file from your accounting or ERP System, you can test the file using the XML File Validator by clicking the **Validate** button (see here). Follow the steps below to complete the setup screen:

1. **File Type**—Since this is an XML project, click **XML**.
2. **Processing Types**—The DXM allows you to process one XML file with a consistent name or all files in a folder. If you want to process one file at a time, choose **File Based**. If you want to process all files in a folder, choose **Folder Based**.

3. **Add Fields from Product Database**— If you want to supplement the data you are importing from your accounting or ERP system, check this box. Click **Setup** to designate the fields you wish to supplement. See **Supplement Data from the Product Database** below for more information.
4. **Package**—If you want to zip up the DXM files to be run on a different computer, click **Package** and identify the location where you wish to save the zip file. This should be done after the setup is complete and fully tested.
5. **XML File (file-based only)**—Click the ellipses button and navigate to the location of your XML file.
6. **Source Folder (folder-based only)**—Click the ellipses button and navigate to the location of the folder containing your XML files.
7. **Location of Files After Processing**—Click the ellipsis button to display a search window that will allow you to navigate through your computer to identify where you would like your text files to be moved after the DXM runs. When moved the processed files will be renamed with the file format YYYYMMDD_HHMMSSXX<filename> where XX is either AM or PM.
8. **Copy Processed Files to Folder**—When you are first setting up a DXM project, you may need to run the import of the delimited text files more than once to ensure the mapping and other configurations are correct. To make this process easier, you should leave this box unchecked so the files you are using to test the import stay in the designated folder. Once your testing is complete, and you are ready to move to the production phase, check this box so the processed files automatically get moved to the folder identified in Step 7, listed above. For folder-based projects, the box is always checked.
9. **Logging in Debug Mode**—Check this box if you are testing the import process and you want the DXM to write a more detailed log entry for the file import. The more detailed log entry may make it easier to diagnose any problems you encounter during the setup process.

Setting Up the DXM Using a SQL Server ODBC Connection



Use a SQL Server ODBC Connection

Shipping Solutions Data Exchange Manager (DXM) includes a 64-bit SQL Server ODBC (Open Database Connectivity) connection option, which allows Shipping Solutions to directly communicate with your business application such as your ERP, accounting, or order-entry system.

We recommend that you create two indexed views in your ERP database containing information on your export orders. The first view should contain header information, meaning all the information that applies to an entire shipment including exporter, consignee and shipping information. The second view should contain the information related to each line item in your orders. The Appendix shows the fields available to import for both the header and detail file. There are hundreds of fields available to import, but at a minimum, you will want to include the following fields from your ERP system in your header view:

Linking Field
Use a field that identifies this shipment and can be used to build the relationship with the line item detail view. This field should be defined as an integer and can be up to 10 digits long. It must be the same data type as the Linking Field in the line item detail view.

Look Up Field
Include a field that the Shipping Solutions user can use to pull the correct order from the database. This can be a field that is also mapped to a Shipping Solutions field or a field that is only used for the lookup process.

Exporter Company Name, Address1, Address2, City, State, Zip and Country
If you are the exporter, this would be your company name and address. States and countries must be two-character codes. For example, if your company is located in Minnesota, you would need to show the state as MN and the country as US. If your company name and address are not available in your ERP system, you can type the Exporter name and address as default values on the Mapping screen when you get to that part of the setup.

Ultimate Consignee Company Name, Address1, Address2, City, Postal Code, and Country
This is the customer that is the ultimate destination for your goods. Just like with the exporter record, the country code must be two characters.

Date
Include a date for this shipment such as Proforma Invoice Date, Commercial Invoice Date or Date of Export. Date fields must be a date or datetime datatype.

At a minimum, you will want to include the following fields from your ERP system in your line item detail view:

Linking Field
Use a field that identifies this shipment and can be used to build the relationship with the header view. This field should be defined as an integer and can be up to 10 digits long. It must be the same data type as the Linking Field in the header view.

Product ID
Some companies do not have Product IDs for their items, so it is not a required field. However, if you have one, it should be included to identify the product as well as to make use of the Product Supplement, which is described here.

Product Description
This is the name of your item. It can be mapped to both the Product Description and Schedule B description, although Schedule B descriptions are generally more generic than Product Descriptions.

Quantity for Invoice
This is the number of a particular item included on this shipment.

Sales Unit of Measure
This is the unit of measure that you use to sell your item such as piece, box, etc.

Unit Price
This is the price per item.

Extended Price
This is the Quantity multiplied by the Unit Price. If you don't map the Extended Price, then the Shipping Solutions user will have to tab through the quantity and price to get the extended price to calculate. If your shipments have many line items, this is a time-consuming task.

Setup a SQL Server ODBC Connection with your ERP System

You should consult with your IT department before proceeding with setting up the ODBC connection. In general, the steps to setup the ODBC connection are:

1. On the computer running the Shipping Solutions client, open the **ODBC Data Source Administrator** window.

    A. Click the **Start** button in the lower-left corner of your computer and start typing **ODBC**.
    B. Choose the 64-bit version.

2. On the **ODBC Data Source Administrator** window click the **System DNS** tab.

3. Click **Add** and choose the correct driver for your data source. You may have to download the correct driver from your ERP system vendor. Click **Finish**.

4. Give your data source a name (a DSN), a description and choose the SQL Server to connect to. We recommend you connect with a SQL login rather than Windows authentication.

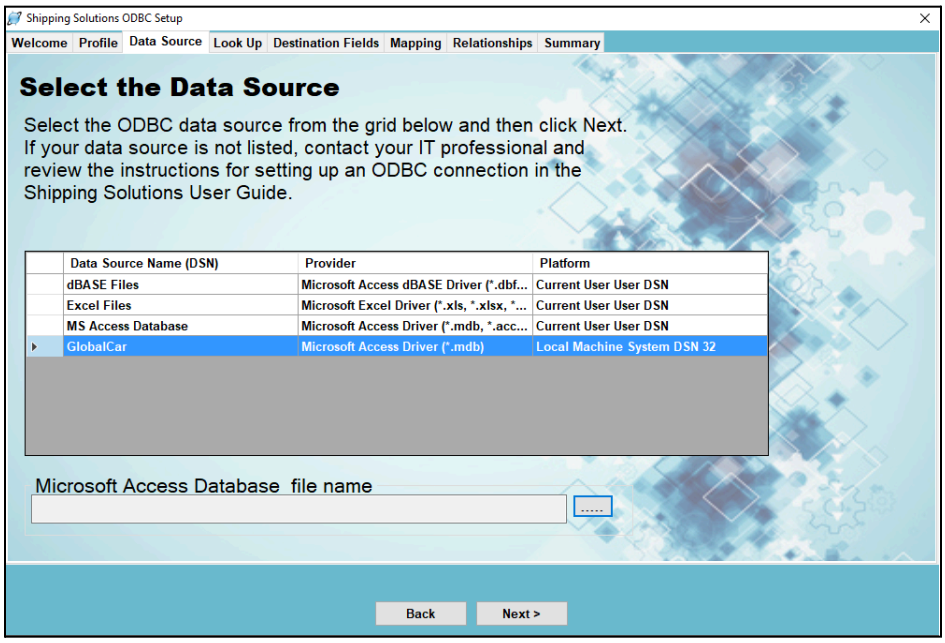
5. Use the ODBC data source wizard to complete the connection.

Once you have created the SQL Server ODBC connection with your accounting or ERP system, go to the **Admin** tab, **Setup Data Exchange Manager for ODBC** screen. Review the **Welcome** screen and click **Next**. Complete the steps on each of the tabs outlined below to configure the setup with Shipping Solutions Professional.

Profile Tab

Create a new profile or edit an existing profile. If you choose **Edit an existing profile**, a grid will pop up showing your existing profiles. You can delete existing profiles or select one to edit and click **Next**. If you choose to **Create a new profile**, a box will pop up where you can enter the name of your new profile.

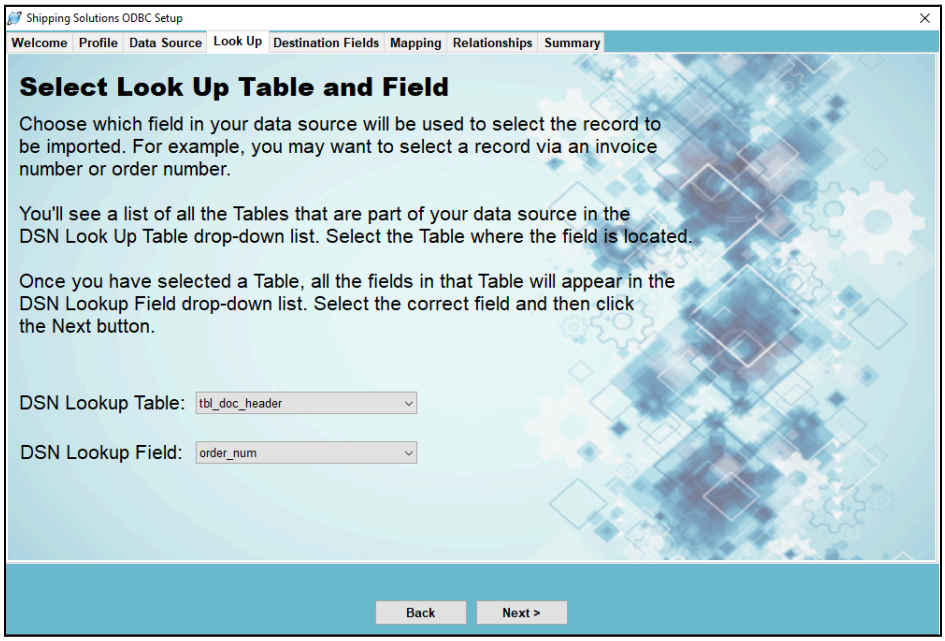
The Data Source Tab in the Shipping Solutions ODBC Setup Screen



Data Source Tab

On this tab you identify the source of your shipment information. The databases that you can connect to via ODBC are listed in the box. Select the data source name and click **Next**. If your data source is not listed, it is probably not compatible. Contact your IT professional and review the general instructions above to confirm.

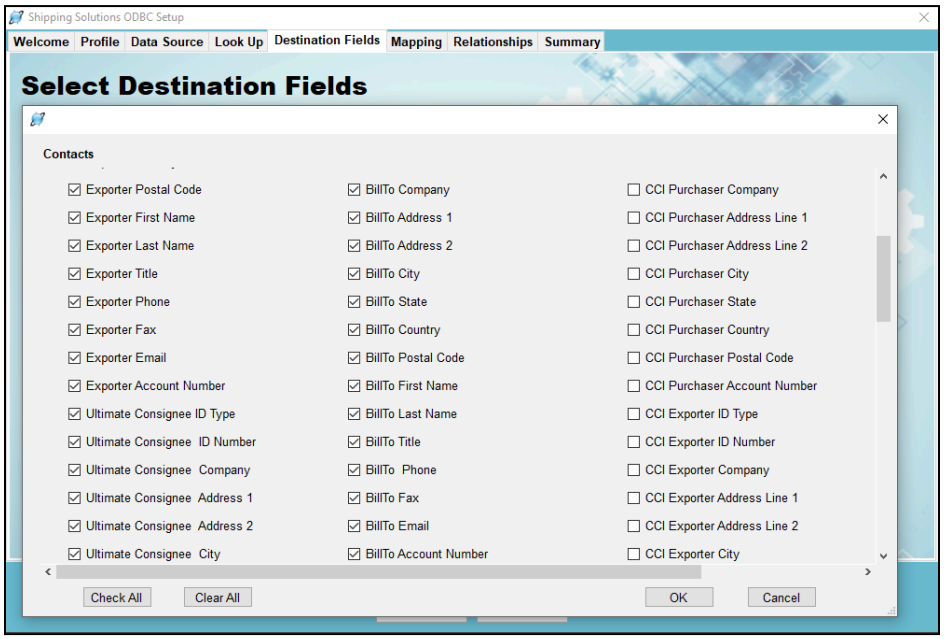
The Look Up Tab in the Shipping Solutions ODBC Setup Screen



Look Up Tab

On this screen you identify the field you want to look up in order to import the correct shipment information. For example, you may want to pull in shipment records via an invoice number or order number. All of the tables and views in your data source are listed in the **DSN Look Up Table** drop-down list. Select the table or view where the field is located. Once you have chosen the table, the possible fields will appear in the **DSN Look Up Field** drop-down list. Select the correct field. Click **Next**.

Selecting Contact Fields in the ODBC Destination Tab



Destination Fields Tab

Now you need to identify which fields in Shipping Solutions you will be populating with information from your data source. The fields available in Shipping Solutions are divided into six groups. Click each group and check the boxes next to the fields you want to populate with information from your data source. You can also select fields that you want to populate with a default value.

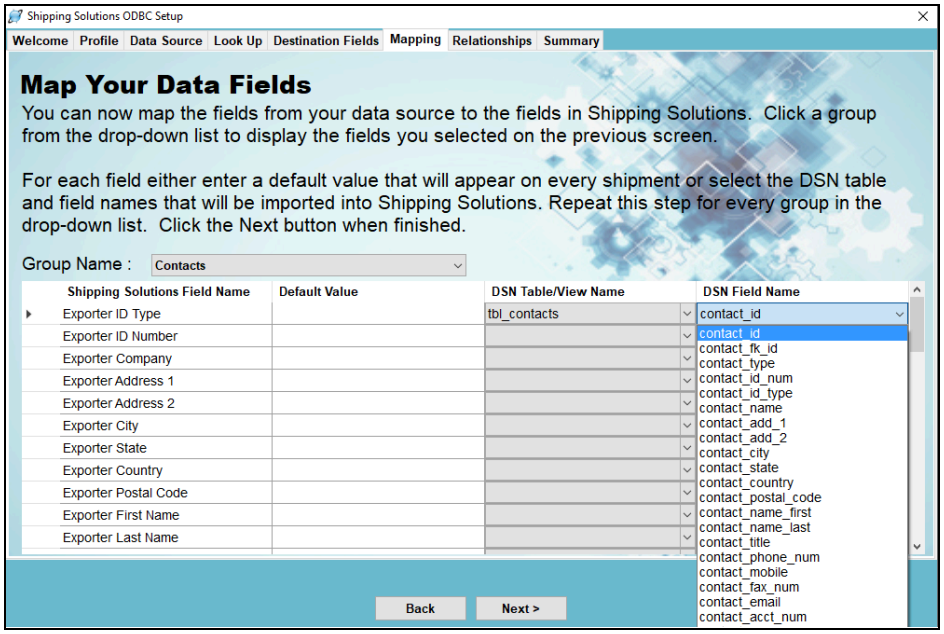
The **Contacts** group includes names and addresses for all the parties in your shipment from your exporter information to the name and address of the ultimate consignee to the FTA producer plus many more. The **Header-Invoice** group includes much of the information needed for your commercial or proforma invoice and your AESDirect filing such as the commercial invoice date, commercial invoice number, and the exporting carrier. The **Product Info** group includes all the information about your line items such as product description, unit price and weight. You must choose at least one field in each of these three groups (Contacts, Header-Invoice, and Product Info.)

The last three groups are used less frequently than the first three because your ERP system may not include fields that are specific to exporting. The **Free Trade/Canada Customs/CARICOM** group includes fields that appear on those documents, such as FTA blanket dates, the Condition of Sale that appears on the Canada Customs Invoice and the Presenting Bank shown on the CARICOM invoice. The **Ocean BL/IATA/IMO/Inland BL** group includes fields specific to the ocean and air waybill and the dangerous goods documents. Finally, the **Shipper's Letter of Instruction** group includes fields for that document, such as various fees.

There is a **Check All** box on each group's screen. However, please note that you will need to map every field that is checked and each group contains many fields, so there is probably no circumstance where you would want to use the **Check All** box.

When you have finished selecting the fields, click **Next**.

The Mapping Tab in the Shipping Solutions ODBC Setup Screen



Mapping Tab

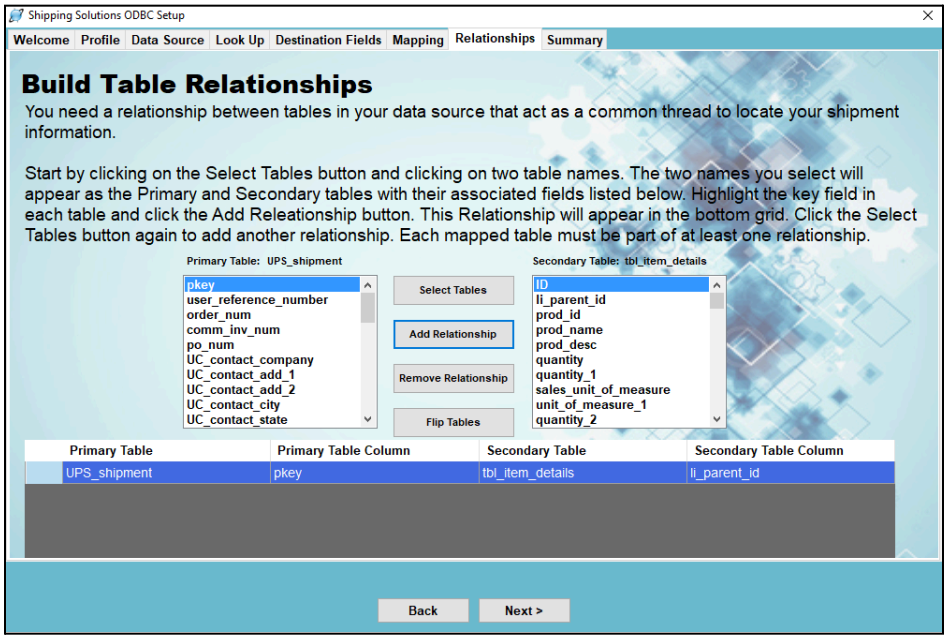
Now you need to identify which field in your data source maps to each field you checked on the Destination Fields tab. The groups you used on the Destination Fields tab will appear in the drop-down list. Select a group. The fields you checked on the Destination Fields tab will appear in the first column.

The second column can be used to enter a default value for this field. For example, you may want to enter a default value for your company name and address. The default value will remain the same for every shipment.

However, most fields will use the third and fourth column only. All the tables and views in your data source will appear in the drop-down list of the **DSN Table/View Name** column. Select the correct table or view for the first field. Field names from the table or view you selected will appear in the **DSN Field Name** column. Select the correct field that corresponds to the **Shipping Solutions Field Name**.

Map each group that appears in the drop-down list. Then click **Next**.

The Mapping Tab in the Shipping Solutions ODBC Setup Screen



Relationships Tab

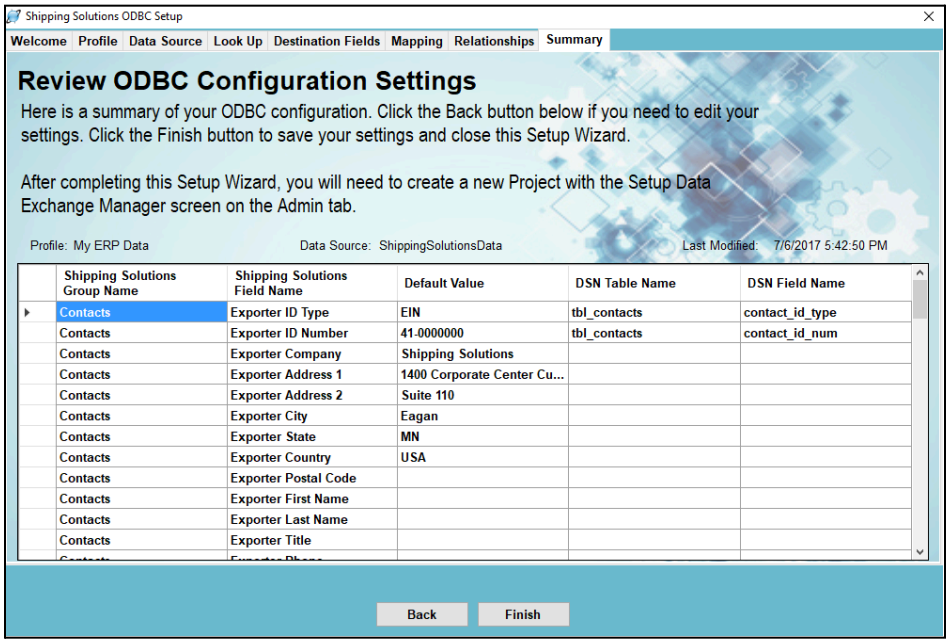
This tab is more complicated than the other tabs and requires a thorough knowledge of your data source, meaning your accounting, order-entry or ERP system.

This screen builds the relationships between the tables. A relationship is built between two matching fields where one field is in each table. For example, the matching field might be the order number, invoice number or another field that is not even part of the shipment data. You will need a relationship between each table in the data source that will act as a common thread to locate the information about a specific shipment throughout the various tables. As discussed earlier, this process is easier if you have created two views with all relevant shipment information.

To add a relationship, click the **Select Tables** button. Each of the tables you used on the **Mapping** tab will appear in the list. If you need to build a relationship with a table that you did not use on the **Mapping** tab, click the **All** button to see all tables in your data source. Select two tables. One table will appear as the **Primary Table** and the other table will appear as the **Secondary Table**.

If you want to switch the two tables you can use the **Flip Tables** button. Flipping the tables may be necessary if you need to build a bridge between two tables that includes a third table not used in the mapping. The fields in each table will appear in the boxes below the table names. Highlight a field in each box and click **Add Relationship**. The relationship will show up in the grid below. Click **Select Tables** again to add another relationship. You can use a table in more than one relationship, but you must have at least one relationship for each table. Continue building relationships until all tables have been used. Then click **Next**.

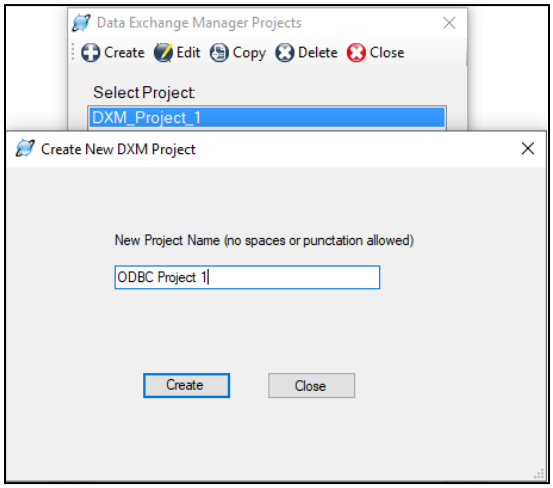
The Mapping Tab in the Shipping Solutions ODBC Setup Screen



Summary Tab

This tab shows a summary of your ODBC configuration. Click the **Back** button to edit any settings. Click the **Finish** button to save your settings and close the **Setup Wizard**.

Creating a New DXM Project Window



Create Your DXM Project

Once you have set up your SQL Server ODBC connection and set up the ODBC configuration, you must create a Data Exchange Manager (DXM) project. Go to the **Admin** tab, **Setup Data Exchange Manager** screen. Click **Create** to create a new project, **Edit** to edit an existing project or **Copy** to copy an existing project.

In the **File Type** box choose ODBC. In the **Profile** box type the name of the profile you just set up. You can also use the **Add Fields from Product Database** check box to supplement the data from your accounting or ERP system with data stored in the Shipping Solutions Product Database. Continue to the next section for more information.

While you are testing the DXM project, check the **Logging in Debug Mode** box. This will provide more detailed logging in case of errors. **Save** and **Close** your project.

Supplement Data from the Shipping Solutions Products Database

Many accounting and ERP systems that companies use are biased towards domestic orders and therefore may not include all the product information that may be required on your export forms. For example, the Schedule B or Harmonized Tariff System (HTS) code may not be stored with the rest of your product information.

If that is the case, Shipping Solutions Professional software users will need to manually add the missing data for each product on every export shipment imported from your accounting system. Alternately, you can automate the process of supplementing the missing data in one of two ways:

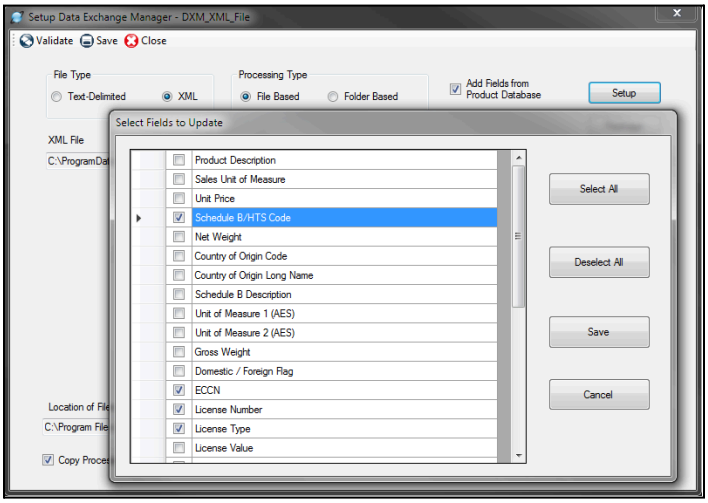
1. You can store the missing data in a table on your server and then reference that table of additional data in the script your company writes to create either the delimited text files or the XML file required for importing your orders into Shipping Solutions Professional using the DXM.
2. You can turn on the feature in the DXM that pulls missing data from the Shipping Solutions Professional's Products Database.

If you choose the second option for adding the missing data, you can import the product data into the Products Database. Refer here for instructions on importing data into the Shipping Solutions database.

For this tool to work and add the selected data fields to any orders you import from your accounting system, the DXM utilizes the Product ID field for each line item imported. The products you reference during the import process must include a Product ID, and that Product ID must be unique for each item.

Once you are sure you have data in the Shipping Solutions Professional Products Database, click the **Add Fields from Product Database** check box, and then click on the **Setup** button in the upper-right corner of the **Setup Data Exchange Manager** window. It will open the **Select Fields to Update** window.

Select Data to Add to an Export Order Imported through the DXM



From this window, check on the box next to the data fields you want to be added from the Products Database to your orders after importing from your accounting system. Once you have selected one or more fields, click on the **Save** button to close the window and return to the main **Setup** window.

If you are selecting FTA Preference Criteria, FTA Producer, or FTA Country of Origin, be sure to also check the matching ID field. For example, in addition to choosing "FTA Preference Criteria," you also need to select "FTA Preference Criteria ID" or this information won't correctly appear on the EZ Start screen or the appropriate export forms.

Running the DXM

Once you have the Data Exchange Manager configured to be able to import your order information from your accounting, order-entry or ERP system, you have three choices for running the DXM: (1) from within Shipping Solutions, (2) from a script, and (3) as a Windows Service. For ODBC projects, you only have the option to run the DXM from within Shipping Solutions.

Run From Shipping Solutions

A user can run the DXM at any time by going to the Shipping Solutions **Tools** tab and clicking on **Run Data Exchange Manager (Import Shipments)**—(see here). From this window, select a **Project** from the drop-down list. Once you select a project, the top window will indicate if there are any files that match the parameters set up in this project and are ready to process or if anything is missing. The bottom box will show you the project parameters. If you have selected a folder-based project, a **Process All Files** check box will appear. Check this box to process all the files without stopping.

For ODBC projects, a **Lookup ID** box will appear. Enter the value for the shipment you want to import. The value is defined on the **Admin** tab's **Setup Data Exchange Manager for ODBC** screen.

To process, click the **Run** button on the toolbar. The bottom box will then display the file as it is being processed and should end with "Shipment ID's Inserted [x]" where "x" is the Shipment Number inserted into your Shipping Solutions database. If there are errors, you can click the **View Log** button on the toolbar to see all the processing messages.

Run Using a Script

Another way to run the DXM is to call the dxmRun.exe file from a batch file or a script. This allows you to import orders from your accounting system without any user intervention. For example, you can call the dxmRun.exe file every time you generate a single XML file or a header and detail delimited text file in your accounting or ERP system so there is no lag between the time the files are created and they appear in Shipping Solutions Professional as a new shipment record.

To run the DXM, run the **dxmRun.exe** executable file either from a script or at the DOS command prompt. When running the program, you will need to specify certain parameters depending on what kind of project you are running:

- Text File-Based Project: Project name, User Name
- XML File-Based Project: Project name, User Name
- Text Folder-Based Project: Project name, Full path of header file, full path of detail file, User Name
- XML Folder-Based Project: Project name, Full path of XML file, User Name

The **User Name** parameter is used to specify what Shipping Solutions User is assigned to the imported shipments. The user name parameter is optional, and the Admin User Name will be used if not specified. The parameter must be specified as UserName=user. Use double quotes if the user name contains spaces, for example, "UserName=user one".

For folder-based projects the full path to the file to be processed needs to be passed in as parameters. If the path contains spaces, it must be enclosed in double quotes so it is seen as a single parameter.

As an example, if you do not move any files from their default locations and you are running a project called Project1, the DOS command would be as follows:

- File-based project:
  C:\> C:\Program Files\InterMart\SSProfessional_9\Applications\DXM\dxmrun\dxmRun.exe Project1

- File-based project with user specified:
  C:\> C:\Program Files\InterMart\SSProfessional_9\Applications\DXM\dxmrun\dxmRun.exe Project1 UserName=user
- Folder-based text-file project:
  C:\> C:\Program Files\InterMart\SSProfessional_9\Applications\DXM\dxmrun\dxmRun.exe Project2 c:/DXMFiles/header.txt c:/DXMFiles/detail.txt
- Folder-based XML project with user specified:
  C:\> C:\Program Files\InterMart\SSProfessional_9\Applications\DXM\dxmrun\dxmRun.exe Project3 C:/DXM_XML_Files/shipment_1987.xml UserName=myuser

This command will read the setup files, locate the data files, and insert the shipment records into your Shipping Solutions Professional database. It will also move the data files to the processed file location and write to the sspro_dxm_logfile.txt log file in your project directory.

You may also add a line to a script file where you specify the DXM to run after your input has been created in your accounting or ERP system.

Run with the DXM Windows Service

Another way to run the DXM is by installing a Windows Service. The service will run continuously on your computer checking a specified folder at specified time intervals for any files that are ready for processing. Only folder-based projects can be run using the Windows Service.

To setup the Windows Service, use Windows Explorer to navigate to the following folder on your computer: **C:\ProgramFiles(x86)\InterMart\SSProfessional_9\Applications\DXMRunService**. Double click on the **setup.exe** file, which will open the **DXMRunService Setup Wizard**. Click **Next**. On the **Start Parameters window**, enter your **Project Name**. This must exactly match the project name you have set up on the Setup Data Exchange Manager screen located on the Shipping Solutions Admin tab. Now enter the **Time Interval in Minutes** and the **User Name**.

The User Name should match one of the User Accounts created on the Shipping Solutions Admin tab. Shipping Solutions will use all the details associated with the Profile associated with that User Name such as the appropriate logo and signatures to place on the export forms for any incoming shipments. If you are using the single-user version of Shipping Solutions Professional, which does not allow you to set up multiple Users, enter “Admin” in this field or leave it blank. Click **Next** until the installation completes. Click **Close**.

The service is now running and will process any files in the specified folder. It will read the setup files, locate the data files, and insert the shipment records into your Shipping Solutions Professional database. Once the import is finished, the Service will move the data files to the processed file location you already identified and write to the **sspro_dxm_logfile.txt** log file in your project directory.

To confirm that the Service is running on your computer, open the **Control Panel** and search for **Services**. It is under **Administrative Tools**. Click **View Local Services** and look for the **DXM Run Service (Shipping Solutions)**.

If you want to change the parameters of the Service, return to the Setup program. Uninstall the Service and then reinstall with the new parameters.

You can review the Service log files in the C:\ProgramFiles\InterMart\DXMRunService\Logs folder. Your folder may be called ProgramFiles(X86). The newest log file is DXMRunService.log. The older logs are numbered .1, .2, etc., with .1 being the next newest file.

Moving Your DXM Project Files

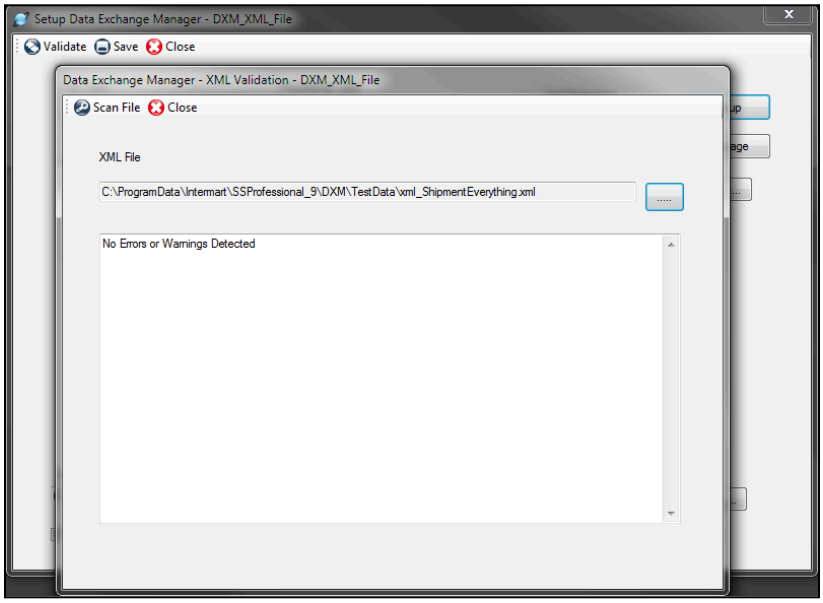
Once you have your DXM project set up on one computer, you can easily move it to your other users’ computers by copying the project folder. Go to C:\ProgramData\InterMart\SSProfessional_9\DXM\Projects. Copy the Projects folder from the working computer to the same location on your other users’ computers. If you have an ODBC project, then you also need to copy the C:\ProgramData\InterMart\SSProfessional_9\DXM\ODBC folder. You will also need to set up a SQL Server ODBC connection between the source system and the second computer.

If you want to run the DXM either from a script or as a Service on another machine that doesn't have Shipping Solutions installed, you can package up your DXM project and move it. This will only work for Text or XML projects. On the **Admin** tab, **Setup Data Exchange Manager** screen, choose the **Project** you wish to move and then click the **Edit** button on the toolbar. From the **Setup Data Exchange Manager** window, click on the **Package** button. This will create a zip file of all the necessary DXM files in the location you specify. Copy and paste the zip file to the new location and then extract the files. The text or XML files identified in the project must have an equivalent path on the computer you are moving it to. To modify your project, you do not need to go back to a computer running Shipping Solutions. You can simply open the **dxmmapping.exe** file located in the **C:\ProgramFiles(x86)\InterMart\SSProfessional_9\Applications\DXM** folder that was included with the zip file.

DXM Testing Tools

The Data Exchange Manager includes tools that will review and validate whether or not the files you are generating from your accounting or ERP system are set up correctly to work with the DXM. We have included sample pipe-delimited files as well as an XML file that can be used for testing. You'll find those sample files in the **c:\ProgramData\InterMart\SSProfessional_9\DXM\TestData** folder.

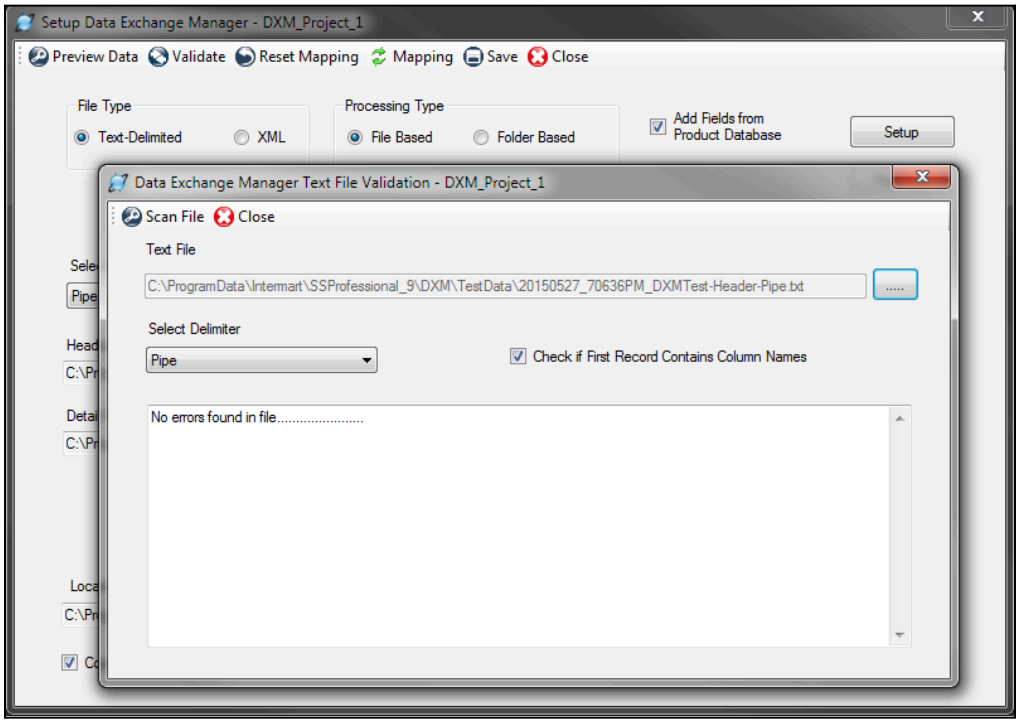
Validating XML Files



XML File Validator

To validate your XML file, open the **Setup Data Exchange Manager** screen on the Shipping Solutions **Admin** tab, click on the **Project** you are working on, and click the **Edit** button on the toolbar. Now click on the **Validate** button on the toolbar. Now click the **Scan File** button. The Validator will run your file against the schema and list any errors it encounters in processing the file.

The XML Validator tends to be a bit pickier than the DXM, so it would be good practice to try running the DXM before reviewing the exceptions generated by the XML File Validator. If you have more than one file you wish to validate, you can click on the ellipsis next to the **XML File** field to search for and choose another file.



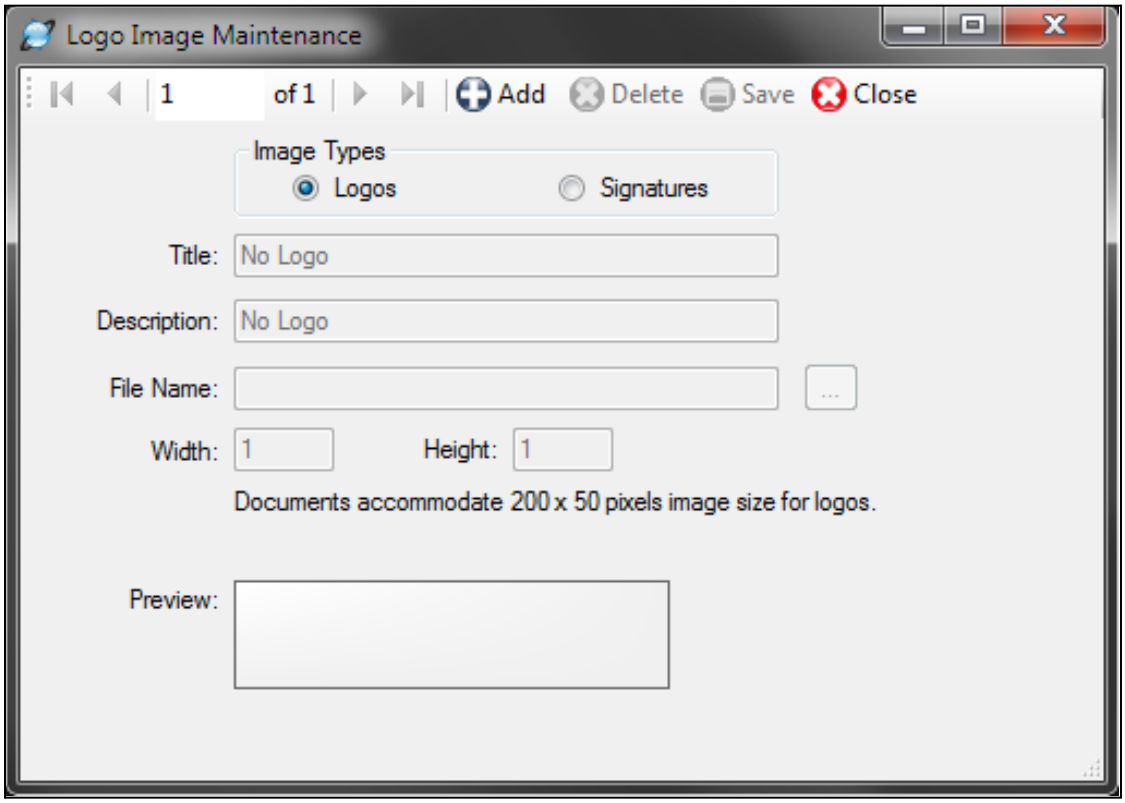
Delimited Text File Validator

The Text File Validator will check your comma-, tab- or pipe-delimited text files generated from your accounting or ERP system to determine if there are any illegal characters or extra line feeds that will cause problems during the process of inserting the data in the Shipping Solutions Professional database.

To validate your delimited text files, open the **Setup Data Exchange Manager** screen on the Shipping Solutions **Admin** tab, click on the **Project** you are working on, and click the **Edit** button on the toolbar. Now click on the **Validate** button on the toolbar. Now click the **Scan File** button. The Validator will run your file against the schema and list any errors it encounters in processing the file.

If you have more than one file you wish to validate, you can click on the ellipsis next to the **Text File** field to search for and choose another file.

There is also a Validate button on the Mapping screen. This will scan the text-delimited files after they have been converted to XML.



Signatures & Logos

Shipping Solutions allows you to print your export forms with your company logo and/or an electronic version of a signature included on the document. Before you can configure Shipping Solutions to do so, you must store electronic versions of the signatures and logos in this database. For the signature, you can also include a **Contact Title** and **Contact Name** that will appear on certain export forms. If you don't enter a Contact Title or Name with your signature, they will be filled in from the **Contacts-Exporter** record.

Once you've added signatures and logos to the database, you can associate them with **Profile Settings** (see here), so that they will automatically appear on the export documents of your choosing. In addition, you will have the ability on many of the **EZ Start** screens to add a signature to a document from a drop-down list, which is pulled from the signatures added here.

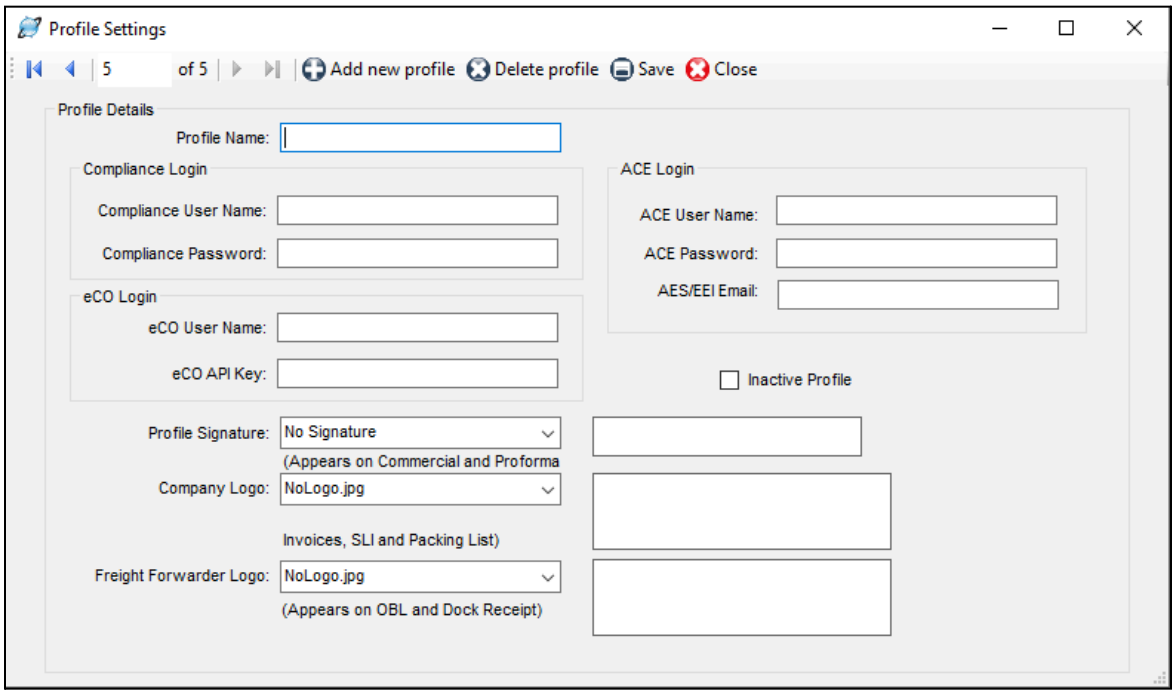
Please Note: The signatures that will appear on your export paperwork are scanned facsimiles of your signature. They do not have the same legal standing as a real signature and should not be used as such. Shipping Solutions provides this option for the convenience of our users. We strongly recommend that you consult an attorney before deciding to use electronic versions of actual signatures.

To add a signature or logo, click the radio button for either **Logos** or **Signatures**. Click **Add** and navigate to your file. Documents accommodate 200x50 pixels for logos and 180x25 pixels for signatures. The accepted file formats are *.bmp,*. jpg and *.png. The file name is filled in the **Title** box, but you can change it and add a description. If the **Width** and **Height** of your image exceed the pixels allowed, you will need to edit your image outside of Shipping Solutions Professional and then reload it here, or your image will appear distorted in the **Preview** box and on the documents.

For instructions on how to improve the look of your signature, contact our office at (651) 905-1727.

Signatures, Contact Title, Contact Name, and logos appear on the documents as shown below:

Document	Signature	Name	Title	Logo
Air Waybill (regular & data only)	YES	NO	NO	NO
Australia FTA Certificate of Origin	YES	NO	NO	NO
CAFTA-DR FTA Certificate of Origin	YES	NO	NO	NO
CARICOM Invoice	YES	NO	NO	NO
Certificate of Origin (Generic)	YES	YES	YES	Exporter Logo
Chile TPA Certificate of Origin	YES	NO	NO	NO
Colombia FTA Certificate of Origin	YES	NO	NO	NO
Commercial Invoice (all versions)	YES	NO	YES	Exporter Logo
Dock Receipt (with Product Summary or Product Detail)	NO	NO	NO	Freight Forwarder Logo
Inland Bill of Lading (with Product Summary or Product Detail)	YES	NO	NO	NO
Japan FTA Certificate of Origin	YES	YES	YES	NO
Korea FTA Certificate of Origin	YES	NO	NO	NO
Ocean Bill of Lading (with Product Summary or Product Detail)	NO	NO	NO	Freight Forwarder Logo
Packing List	YES	NO	NO	Exporter Logo
Panama TPA Certificate of Origin	YES	YES	YES	NO
Peru TPA Certificate of Origin	YES	YES	YES	NO
Proforma Invoice (all versions)	YES	NO	YES	Exporter Logo
Shipper’s Letter of Instruction (in NCBFAA and SED formats)	YES	YES	YES	NO
Shipper’s Letter of Instruction (with Product Summary or Detail)	YES	NO	YES	Exporter Logo
Singapore FTA Certificate of Origin	YES	YES	YES	NO
USMCA (all versions)	YES	YES	YES	Exporter Logo



Profile Settings

Profiles allow you to set logos, signatures and more for each user account that you create in Shipping Solutions. The **Default Profile** is already set-up. If you want all users to use the same profile you can simply modify the data fields described below for the **Default Profile**. However, if you want to assign different profiles to different user accounts, click the **Add new profile** button, assign a **Profile Name,** and modify the following fields:

Compliance Login (Not available in Shipping Solutions Classic)

This is the user name and password that allows you to run the Export Compliance Module through the Shipping Solutions software (see here). You must have an active Annual Maintenance Program to use the Export Compliance Module. To receive a user name and password, send an email to help@shippingsolutionssoftware.com. You run the Export Compliance Module by clicking on the **Compliance** button on the **EZ Start** screen. You can enter your user name and password directly on that screen, but if you enter it here it will be saved and you won't need to re-enter it again.

ACE Login

You can save your ACE login information here, but with the change to the ACE Modernized Portal, they will not automatically fill in.

AES/EEI Email

This is the email address to which the AES server will send email confirmation of a successful AES filing along with the shipment's ITN number. If you want the email sent to multiple email addresses, you can enter them here separated by a comma.

eCO Login

When you register for the electronic Certificate of Origin (eCO) service, the American World Trade Chamber of Commerce (AWTCC) will send you an email with a link to reset your portal password. Enter your email address and portal password here. For more information on the eCO process, see here.

Profile Signature

Choose the signature you want to use with this profile from the drop-down list. The signatures you added earlier using the **Signatures & Logos** screen will appear in the drop-down list. The signature will appear on the documents as shown in the chart on the previous page.

Company Logo

Choose a logo from the drop-down list that you entered earlier using the **Signatures & Logos** screen. This is the logo that will appear on the commercial and proforma invoices, the packing list and the shipper's letter of instruction.

Freight Forwarder Logo

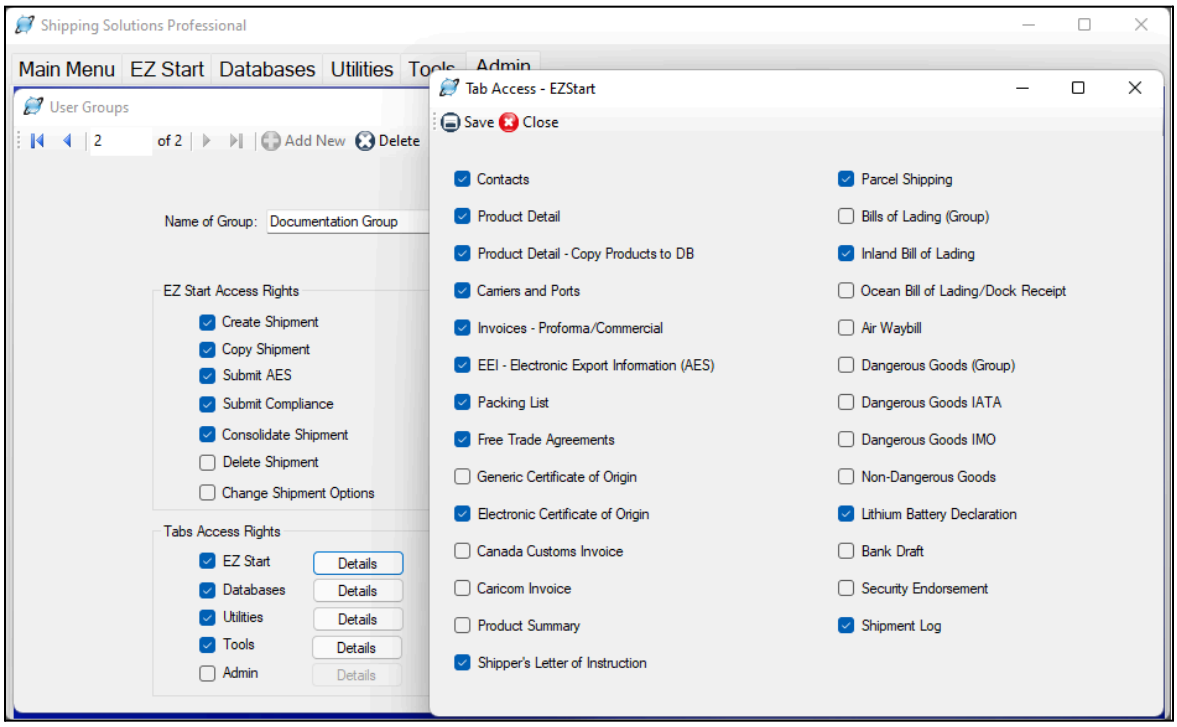
Choose a logo from the drop-down list that you entered earlier using the **Signatures & Logos** screen. This is the logo that will appear on the ocean bill of lading and dock receipt.

For the profiles to be used, you must go to the **User Accounts** screen and assign each user account the appropriate profile. Each time that user creates a new shipment on the **EZ Start** tab, the profile assigned to that user will be assigned to that shipment.

You can create new profiles any time you have a change; for example, a new company logo. Creating a new profile rather than changing an existing profile will keep older shipments intact with their original profiles. If a profile is no longer needed you can check the **Inactive Profile** box. This is preferable to deleting the profile as it will then remain in effect on any shipments that used the now inactive profile.

Any shipment created by a user account will be given the profile assigned to that user. You can also change the profile assigned to an individual shipment by going to the **EZ Start** screen, finding the shipment, and clicking on **Change Shipment Options**.

Set Up Access Rights for User Groups on the Admin Tab



User Groups (Professional Multi-User Version Only)

User Groups allow you to assign specific capabilities to different groups of users. The **Admin** group comes preset in Shipping Solutions with full access rights; you cannot change this group. If you want all users to have full access to Shipping Solutions you do not need to create any additional groups.

If you want different user groups, however, click **Add New**. Enter a group name and check the boxes to allow access to different parts of the software broken out into **EZ Start Access Rights**, which are primarily the various functions available on the EZ Start Toolbar, and **Tabs Access Rights**, which allows access to various screens that are part of each tab.

EZ Start Access Rights include:

Create Shipments
This allows the user to create a new shipment on the **EZ Start** tab.

Copy Shipment
This allows the user to copy a previous shipment record on the **EZ Start** tab.

Submit AES
This gives the user access to the **AES** button at the top of the **EZ Start** tab. It allows you to file your shipment information with the U.S. Census Bureau via AES*Direct*.

Submit Compliance
This gives the user the ability to run compliance screenings from the **EZ Start** tab if that user has registered for the Export Compliance Module and has a user name and password. The Export Compliance Module includes Document Determination, Export License Determination and Restricted Party Screening.

Consolidate Shipments
This gives the user the ability to combine multiple shipment records in Shipping Solutions into a single set of export forms that can be previewed, printed and emailed as well as submitting the data from this consolidated shipment to AES and to run compliance screenings for this shipment.

Delete Shipment
This allows the user to delete a shipment from the **EZ Start** tab.

Change Shipment Options
This allows the user to click on the **Change Shipment Options** button on the **EZ Start** tab and change the **Shipment Number**, **Profile** or **Search Tag**.

Tabs Access Rights includes a **Details** button next to the name of each Shipping Solutions tab. When you grant access to a specific tab by clicking on the check box for that tab you can further refine access rights by clicking on the **Details** button and granting or denying access to each individual screen within that tab. Those tabs include:

EZ Start
This gives the user access to the various screens located in the **EZ Start** tab, which are used to add, modify or delete data for each individual shipment record.

Databases
This gives the user access to the **Databases** tab where they can add, change or delete contact and product information.

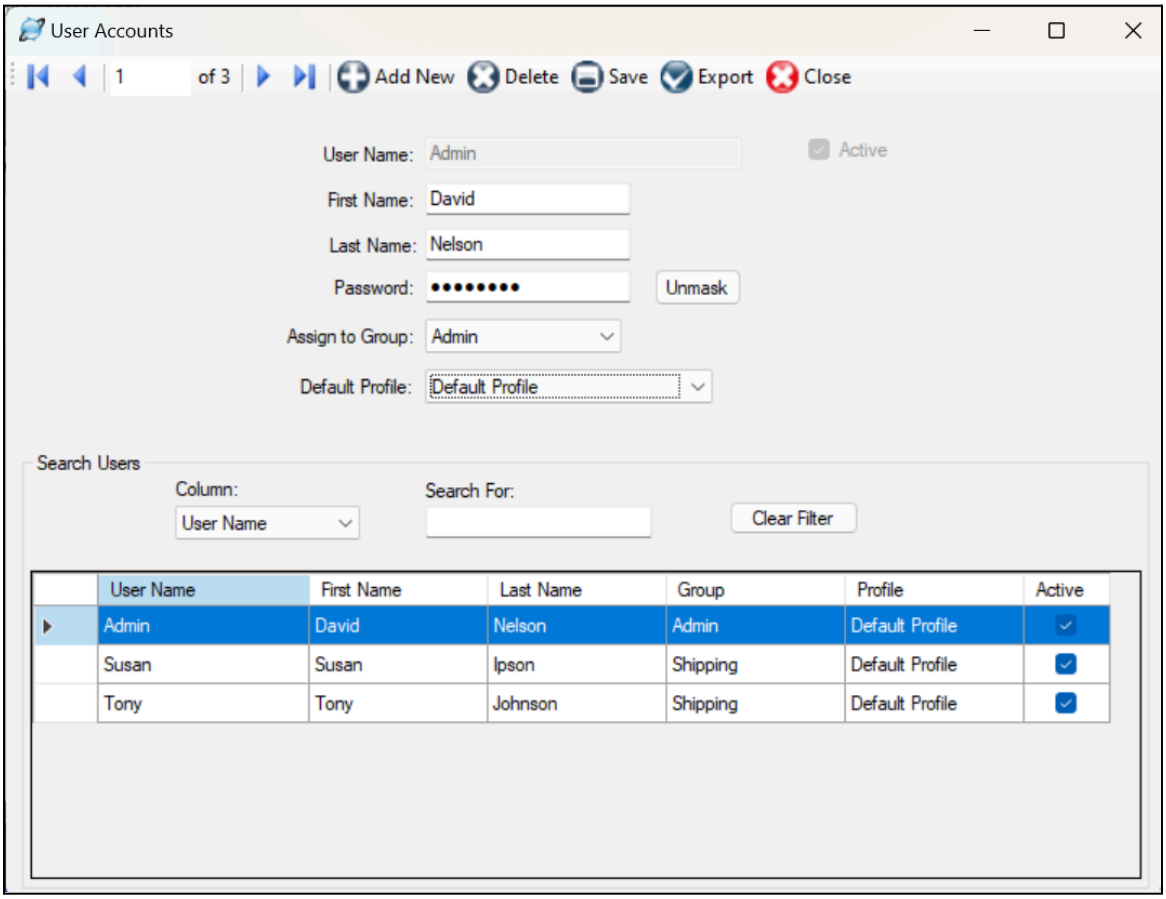
Utilities
This gives the user access to the **Utilities** tab where they can use the **Conversion Calculator**, generate reports, print shipping labels, and generate XML data files for Canadian Customs.

Tools
This gives the user access to the **Tools** tab where they can run the **Data Exchange Manager**, import and export contact and product databases, backup the database, delete blocks of shipments, lock and unlock shipments, and customize the documents.

Admin
This gives the user access to the **Admin** tab where they can set the SQL database connection, set up the **Data Exchange Manager**, add signatures and logos, and create profiles, user groups and user accounts.

Click **Save**. Repeat the process for as many user groups as you need. Then close the **User Groups** screen and click on **User Accounts**. For each user account, choose the proper group from the **Assign to Group** dropdown list.

Anyone who has been granted user rights to the Admin tab will be able to create new user groups or modify existing user group settings at any time.



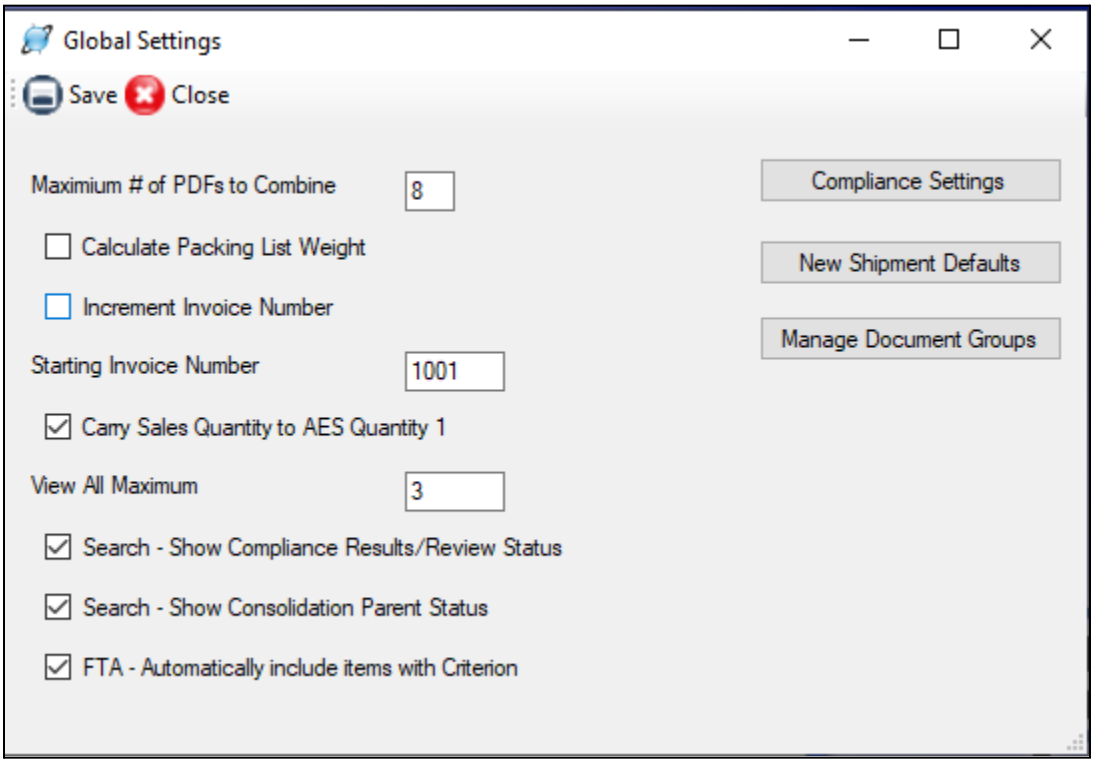
User Accounts

Here is where you can assign users to groups and set a user's default profile.

- If you have the single user version of Shipping Solutions, your **User Name** will be Admin and the **Assign to Group** box will say Admin. These cannot be changed. You can, however, change your **Default Profile**. Any profiles you created under **Profile Settings** will be listed in the drop-down list. Changing your default profile here will change the profile used for any new shipments, but the profile will not change for any shipments that have already been created.
- If you have the multi-user version of Shipping Solutions you can add **User Accounts** for each of your Shipping Solutions users. Click **Add New** and enter a **User Name**. Enter the **First Name** and **Last Name** of the user and enter a **Password**. You can then assign the users to any group you have set up on the **User Groups** screen. If you created other profiles under **Profile Settings** you can change the user's profile here.

Use the search area at the bottom of the screen to easily locate a specific user. Click the **Export** button at the top of the screen to get a list of your User Accounts in an Excel format.

Global Settings Screen on Admin Tab



Global Settings

There are several software features that can be turned on and off on this Global Settings screen. If you turn on a feature, it will be turned on for all users. Always close and reopen Shipping Solutions after changing a Global Setting to make sure it takes effect.

Maximum # of PDFs to Combine

This option controls how many PDF documents you can combine on the **Preview/Print/Email Documents** screen on both the EZ Start and Consolidation Utility. By default, five documents can be combined into one PDF. However, if you have enough system resources, you may be able to combine more than five documents. You can change the maximum number of forms to be combined here. If you encounter an error when increasing the maximum number of documents to combine, reduce the number until the error resolves.

Calculate Packing List Weight

If you check this box, Shipping Solutions will pull the Gross and Net Weight you entered for each line item on the **EZ Start-Product Details** screen and enter them on the **Packing List** screen. As you load each container on the **Packing List** screen, the weight for all the items loaded will be calculated and entered for each package. If the amount is not correct due to rounding or some other issue, you can always modify the number on the **Packing List** screen. It will not change back to the calculated amount unless you unpack and repack the items again.

Increment Invoice Number

If this box is checked, Shipping Solutions will automatically fill in an **Invoice Number** on the **EZ Start-Invoices** screen starting with the number you enter in this box. The **Invoice Number** will be automatically incremented and assigned when you click **New** or **Copy** on the EZ Start screen toolbar. It will also work when running the Data Exchange Manager (DXM) unless you map a different value to the **Invoice Number** field.

Carry Sales Quantity to AES Quantity 1

Normally when you enter a sales quantity on the **EZ Start-Product Details** screen, that quantity will be carried down to the **AES Quantity 1** field. However, if your items have Schedule B codes that require different units of measure, you can uncheck this box and enter the **AES Quantity 1** separately.

View All Maximum

This setting allows you to control how many shipments are displayed when clicking **View All** on the **EZ Start-Find** and **EZ Start-Select Shipment** screens, which are actually the same screen with two ways to get there. By default, this screen will only display your 20 most recent shipments. If you need to scroll through more than 20 shipments, you can click on the **View All** button. However, if you have thousands of shipments, displaying all your shipments can take a long time or even crash the system. If that is the case, you can enter a number in the **View All Maximum** that your system will be able to handle. The default is set at 1,000.

If you have more shipments than the View All Maximum when you click the **View All** button on the EZ Start-Find or EZ Start-Select Shipment screens, a message will pop up: *There are more shipments than the View All Maximum of X. Do you still want to view them all?* If you answer **Yes**, the program will attempt to load all your shipments into the screen. If you answer **No**, the program will load the number of shipments that you have set as your **View All Maximum**. This allows you to see more than the 20 shipments that normally display on the **EZ Start-Find** and **EZ Start-Select Shipment** screens but less than all your shipments.

Please Note: If you have a large number of shipments stored in Shipping Solutions, it is more efficient to search for shipments or groups of shipments by using the **Search For** box and the **Column** and **Match** criteria options on the **EZ Start-Find** and **EZ Start-Select Shipment** screens.

Search - Show Compliance Results/Review Status

This setting gives users the option to add a **Results** and **Review** status to the Find Shipments and Compliance Audit Trail screens.

The **Results** status indicates if a restricted party screening was run for a shipment and if there are any potential matches that need to be reviewed. The **Review** status allows users to indicate that the screening results were reviewed and whether the shipment was approved or denied.

If you would like to turn on this optional feature, go to the **Admin** tab, **Global Settings** screen. Click the **Search – Show Compliance Results/Review Status** check box. Save and close the screen.

When you go to the **EZ Start** tab and click **Find** or **Select Shipment**. You will now see two new columns: **Results** and **Review**. These columns will be blank for shipments with screenings run prior to installing Version 9.18. Only the results and review status from the most recent Restricted Party Screening will display.

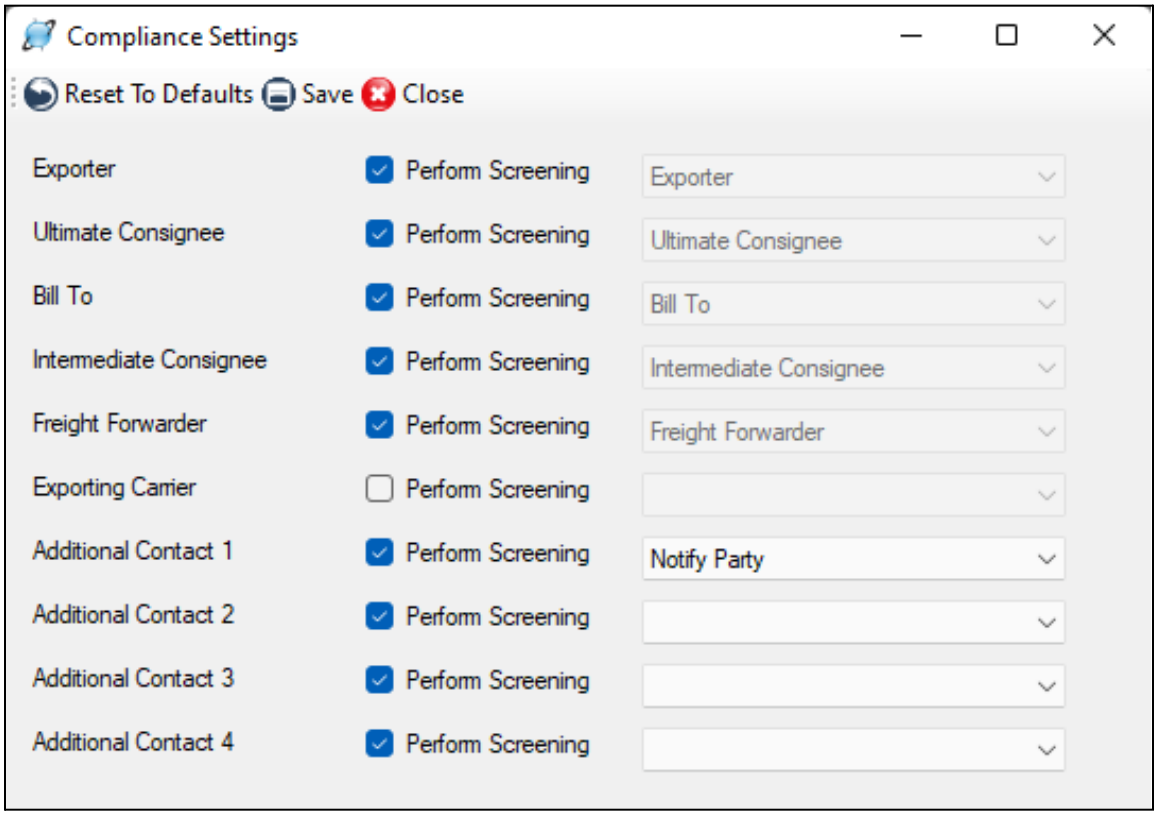
To review the results again, select a shipment and then click the **Compliance** button. Click **Audit Trail**. You will see the list of screenings run for this shipment from newest to oldest along with their **Results** and **Review** statuses. Select a screening and then click **View Results** to see the results of that screening. You can then change the **Results** status if needed.

FTA-Automatically Include Items with Criterion

This check box controls whether a line item is displayed on any of the Free Trade Agreement documents. When the box is checked, Shipping Solutions will check the **EZ Start-Product Detail** screen. If there is data entered in any of the fields in the Free Trade Agreements section, then the line item will display on the Free Trade Agreement documents. If there is no data entered in the Free Trade Agreements section of the EZ Start-Product Details screen, then the item will not display on the Free Trade Agreement document. If the box here is unchecked, then all items will display on the Free Trade Agreement documents, whether data is entered or not. However, you still have the option to uncheck the **FTA Certificates** box on the EZ Start-Product Detail screen to exclude a particular line item.

If you would like to make use of this option, check the box and then close Shipping Solutions. The option will take effect when you reopen the software.

Compliance Settings Feature in the Global Setting Screen

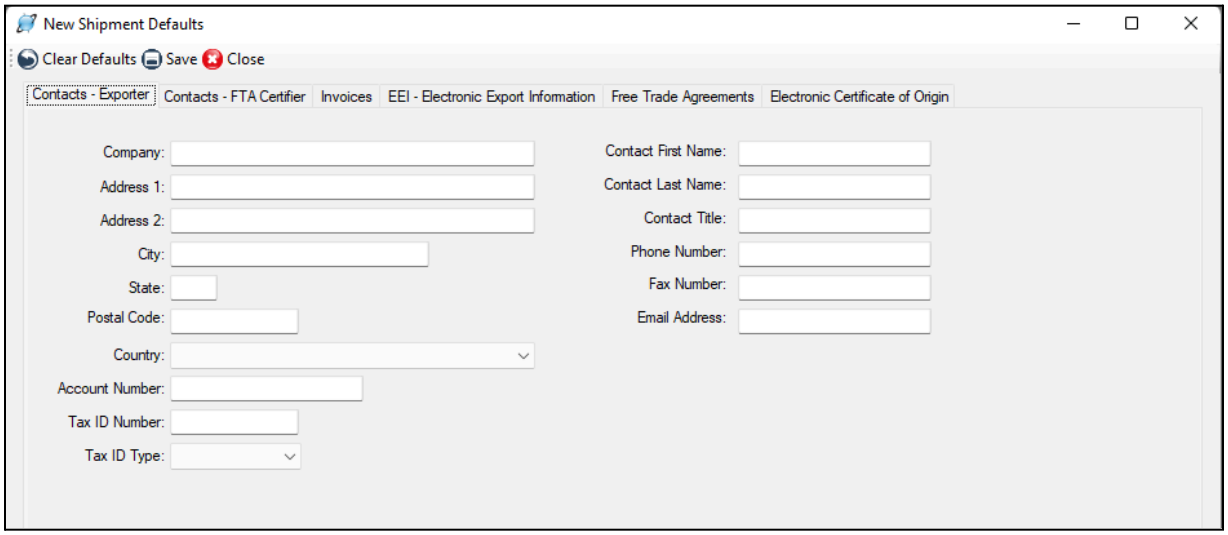


Compliance Settings

The Restricted Party Screening feature in the **Export Compliance Module** screens the following contacts that have been entered on the EZ Start-Contacts screen: Exporter, Ultimate Consignee, Bill To, Intermediate Consignee, and Freight Forwarder. If you don't want to screen a contact, you can uncheck the box here. (You should consult with your company's legal and/or compliance team to determine whether this is advisable.) The results will indicate that the contact was not screened.

You also have the option to screen the Exporting Carrier and up to four additional parties to the shipment. To add a contact, check the **Perform Screening** box and select the additional contact(s) to screen. You must then enter that contact on the **EZ Start-Contacts** screen. You can add a contact there by clicking on the right mouse button in the white box and selecting **Add Contact**.

Setting Shipment Defaults in the Global Shipment Screen



New Shipment Defaults

This feature allows you to set defaults for certain fields so that you won't have to enter them every time you create a shipment. Enter the default values on any or all of the tabs: Contacts-Exporter, Contacts-FTA Certifier, Invoices, EEI-Electronic Export Information, Free Trade Agreements and Electronic Certificate of Origin. Then, when you click the **New** button on the EZ Start screen, the defaults will be automatically entered on the shipment. You can always change the default values on the shipment if for some reason they don't apply to a particular shipment.

Registration Number

Shipping Solutions requires you to register using the number provided. It is preferable to register via the pop-up screen when you first open Shipping Solutions, but if you don't have internet access, you can register by phone here.

Technical Support

Contacting InterMart

If you have any questions about or problems with the Shipping Solutions software, InterMart provides several options for assistance:

Read the User Guide

The most comprehensive instructions for using the Shipping Solutions software is always contained in the User Guide. You will find the most current version of the User Guide online at www.shippingsolutionssoftware.com/user-guide.

Call Us

InterMart customer service representatives are available during normal business days from 8:00 a.m. until 6:00 p.m. Central Time by calling (651) 905-1727.

Email Us

You can send your questions about Shipping Solutions to help@shippingsolutionssoftware.com. We will reply to your email questions by the end of the next business day.

Watch a Video

InterMart has a video library that explains the various features included within the Shipping Solutions software, which is available at www.shippingsolutionssoftware.com/video-tutorials, or visit our YouTube channel: Shipping Solutions.

Shipping Solutions Professional Customizations

InterMart often gets requests from Shipping Solutions users who want to customize the program to meet their company's specific needs. InterMart can and will customize the software at a rate of $250 per hour. If you would like to receive a written quote for a customized version of Shipping Solutions Professional, contact InterMart toll-free at (651) 905-1727.

Appendix

Summary of Export Documents

Shipping Solutions export document and compliance software puts dozens of export documents at your fingertips. The following summary includes:

- A description of each document available on the **EZ Start-Preview/Print/Email** screen.
- Charts explaining the differences if there is more than one version of the document.
- What version includes each document (C for Classic, P for Professional, E for Enterprise).
- The **EZ Start** screens where the data is entered to complete each document.
- Whether a document is also available in the Consolidation Utility of Professional and Enterprise.

You'll find a more complete description of the various export documents in our free whitepaper: *The Beginner's Guide to Export Documents*: www.shippingsolutionssoftware.com/whitepaper-beginners-guide-to-export-forms.

Air Waybill

An air waybill serves as a contract between the exporter and the air carrier or its agent to transport merchandise as specified by the shipper. It serves as a receipt for the cargo and a contract stating where to deliver the goods, freight charges to be paid, and who the goods are to be consigned to.

To complete the document, the contact names and addresses are entered on the **EZ Start-Contacts** screen. The ITN number or AES exemption statement is entered on the **EZ Start-EEI screen**. The line items and all other fields come from the **EZ Start-Air Waybill** screen.

Document Title	Versions	What Prints	Notes
Air Waybill	C, P, E	Full Document	
Air Waybill (Data Only)	C, P, E	Data only for use with pre-printed form.	
Air Waybill – Master	P, E	Full Document	Shows Freight Forwarder as shipper and Intermediate Consignee as consignee.
Air Waybill – Master (Data Only)	P, E	Data only for use with pre-printed form.	Shows Freight Forwarder as shipper and Intermediate Consignee as consignee.

Australia FTA Certificate of Origin (C, P, E)

The Australia Free Trade Agreement (FTA) Certificate of Origin is used for shipments between the United States and Australia that qualify for preferential duties and taxes under the free trade agreement.

To complete the document, the contact names and addresses can be entered on the **EZ Start-Contacts** screen. The line items are pulled from the **EZ Start-Product Detail** screen, and the rest of the fields are entered on the **EZ Start-Free Trade Agreements** screen.

This document is also available in the Consolidation Utility of Professional and Enterprise.

Bank Draft (C, P, E)

A bank draft is a negotiable instrument containing an unconditional order to pay a sum of money from the drawer to the drawee. It must be signed by the drawer. A bank draft can also include a remittance letter containing complete instructions for payment.

All the fields on the two bank draft documents are entered on the **EZ Start-Bank Draft** screen.

Document Title	Notes
Bank Draft	Includes a remittance letter with complete instructions on how documents are to be handled and payment made.
Bank Draft – Letter of Credit	Only includes information about the drawer and drawee.

CAFTA-DR Certificate of Origin (C, P, E)

The CAFTA-DR Certificate of Origin is used for shipments between the United States and the Central American countries of El Salvador, Guatemala, Honduras, Nicaragua and Costa Rica as well as the Dominican Republic if the goods qualify for preferential duties and taxes under the free trade agreement.

To complete the document, the contact names and addresses can be entered on the **EZ Start-Contacts** screen. The line items are pulled from the **EZ Start-Product Detail** screen, remarks are entered on the **EZ Start-Invoices** screen, and the rest of the fields are entered on the **EZ Start-Free Trade Agreements** screen.

This document is also available in the Consolidation Utility of Professional and Enterprise.

Canada Customs Invoice (C, P, E)

Commercial shipments to Canada, regardless of mode of transport, which are valued at over $2,500 (Canadian funds), are not classified under HTUSA Chapter 9810 (Importations of religious, educational, scientific and other institutions), and are subject to duties and sales taxes, should be accompanied by a Canada Customs Invoice. The invoice must contain all the information currently required by Canada Customs Regulations and can be prepared either by the exporter or importer or their agents.

To complete the document, all the contacts names and addresses can be entered on the **EZ Start-Contacts** screen. The line item information is entered on the **EZ Start-Product Details** screen. Transportation-related information is entered on the **EZ Start-Carriers and Ports** screen, the PO number and any special instructions are entered on the **EZ Start-Invoices** screen, and the rest of the information pulls from the **EZ Start-Canada Customs Invoice** screen.

This document is also available in the Consolidation Utility of Professional and Enterprise.

CARICOM Invoice (C, P, E)

The CARICOM Invoice is used when exporting goods from the U.S. to one of the 15 Caribbean countries that belong to the Caribbean Community & Common Market trade agreement. The CARICOM members are: Antigua & Barbuda, Bahamas, Barbados, Belize, Dominica, Grenada, Guyana, Haiti, Jamaica, Montserrat, Saint Lucia, St Kitts & Nevis, St Vincent & the Grenadines, Suriname, and Trinidad & Tobago.

To complete the document, all the contact names and addresses can be entered on the **EZ Start-Contacts** screen. The line item information is entered on the **EZ Start-Product Details** screen, and transportation-related information is entered on the **EZ Start-Carriers and Ports** screen. Invoice information and fees are entered on the **EZ Start-Invoices** screen, and the rest of the information pulls from the **EZ Start-Caricom Invoice** screen.

Certificate of Origin (Generic) (C, P, E)

A generic certificate of origin is used to certify to the importer where the goods were manufactured. Unlike the USMCA Certification of Origin, which only pertains to the U.S., Canada and Mexico, or the CAFTA-DR Certificate of Origin, which only pertains to the U.S. and a group of Central American nations, the generic certificate of origin can be used for any country you are exporting to. Virtually every country in the world considers the origin of imported goods when determining what duty to assess.

To complete the document, enter the exporter and importer on the **EZ Start-Contacts** screen. The line items come from the **EZ Start-Product Details** screen, any special instructions can be entered on the **EZ Start-Invoices** screen, and the rest of the information is entered on the **EZ Start-Generic Certificate of Origin** screen.

This document is also available in the Consolidation Utility of Professional and Enterprise.

Chile FTA Certificate of Origin (C, P, E)

The Chile FTA Certificate of Origin is used for shipments between the United States and Chile if the goods qualify for preferential duties and taxes under the free trade agreement.

To complete the document, the contact names and addresses can be entered on the **EZ Start-Contacts** screen. The line items are pulled from the **EZ Start-Product Detail** screen, and the rest of the fields are entered on the **EZ Start-Free Trade Agreements** screen.

This document is also available in the Consolidation Utility of Professional and Enterprise.

Colombia TPA Certificate of Origin (C, P, E)

The Colombia Trade Promotion Agreement (TPA) Certificate of Origin is used for shipments between the United States and Colombia if the goods qualify for preferential duties and taxes under the free trade agreement.

To complete the document, the contact names and addresses can be entered on the **EZ Start-Contacts** screen. The line items are pulled from the **EZ Start-Product Detail** screen, remarks are entered on the **EZ Start-Invoices** screen, and the rest of the fields are entered on the **EZ Start-Free Trade Agreements** screen.

This document is also available in the Consolidation Utility of Professional and Enterprise.

Commercial Invoice

The Commercial Invoice is a bill of goods from the seller to the buyer. It is the primary shipping document used by customs worldwide for commodity control and valuation.

To complete the document, the contact names and addresses can be entered on the **EZ Start-Contacts** screen. The transportation-related information comes from the **EZ Start-Carriers and Ports** screen. The line items come from the **EZ Start-Product Detail** screen, and the rest of the information comes from the **EZ Start-Invoices** screen.

These documents are also available in the Consolidation Utility of Professional and Enterprise.

Document Title	Version	Language	Notes
Commercial Invoice	C, P, E	English	
Commercial Invoice (French)	P, E	French	Field labels are in French. Labels can be modified on the Tools tab=>Customize Documents screen. Data is not translated.
Commercial Invoice (Spanish)	P, E	Spanish	Field labels are in Spanish. Labels can be modified on the Tools tab=>Customize Documents screen. Data is not translated.
Commercial Invoice for Israel	C, P, E	English	Choose whether the Producer or Exporter will be certifying the Invoice on the EZStart=>NAFTA screen. If Producer, add contact information as well.
Commercial Invoice (Landscape)	C, P, E	English	Includes more contact types and more line item detail than the standard Commercial Invoice.

Dangerous Goods IATA (P, E)

If your item is considered a dangerous good (DG) by the International Air Transport Association (IATA), you can prepare the proper document for your air shipment using Shipping Solutions.

To complete the documents, enter the contact names and addresses on the **EZ Start-Contacts** screen. The line items are added on the **EZ Start-Product Detail** screen but additional items can be added on the **EZ Start-Dangerous Goods IATA** screen. The commercial invoice number is entered on **the EZ Start-Invoices** screen, and the air waybill number is entered on the **EZ Start-Air Waybill** screen. The remaining information is entered on the **EZ Start-Dangerous Goods IATA** screen.

The chart below outlines the various Dangerous Goods IATA documents.

Document Name	Line Item Display	What Prints	Notes
Dangerous Goods IATA	Columns	Full document for use with a color printer on plain paper.	

Dangerous Goods IATA (Data Only)	Columns	Data only for use with pre-printed form.
Dangerous Goods IATA (No Red Border)	Columns	Full Document excluding red border to print on red border paper.
Dangerous Goods IATA No Columns	No columns, data divided by double-slashes	Full document for use with a color printer on plain paper.
Dangerous Goods IATA No Columns (Data Only)	No columns, data divided by double-slashes	Data only for use with pre-printed form.
Dangerous Goods IATA No Columns (No Red Border)	No columns, data divided by double-slashes	Full document excluding red border to print on red border paper.

Dangerous Goods IMO (P, E)

If your item is considered a dangerous good (DG) by the International Maritime Organization (IMO) you can prepare the proper document for your vessel or ground shipments using Shipping Solutions.

To complete the document, enter the contact names and addresses on the **EZ Start-Contacts** screen. The line items are added on the **EZ Start-Product Detail** screen but additional items can be added on the **EZ Start-Dangerous Goods IMO** screen. The remaining information is entered on the **EZ Start-Dangerous Goods IMO** screen.

The chart below explains the various Dangerous Goods IMO documents.

Document Name	Line Item Display	What Prints	Notes
Dangerous Goods IMO	Columns	Full document for use with a color printer on plain paper.	
Dangerous Goods IMO (Data Only)	Columns	Data only for use with pre-printed form.	
Dangerous Goods IMO (No Blue Border)	Columns	Full document excluding blue border to print on blue border paper.	

Dangerous Goods Lithium Battery Declaration (P, E)

To complete the Dangerous Goods Lithium Battery Declaration, complete the information on the EZ Start-Dangerous Goods-Lithium Battery Declaration screen. The only data not pulled from that screen is the name, address and phone number of the shipper, which is pulled from the EZ Start-Contacts screen, Exporter record.

Dock Receipt (C, P, E)

The dock receipt acts as proof of delivery of the cargo to the carrier in good condition when an inland carrier is used to move the goods to a port for export.

To complete the document, enter the contact information on the **EZ Start-Contacts** screen, any special instructions on the **EZ Start-Invoices** screen, and the transportation-related information on the **EZ Start-Carriers and Ports** screen. The source of the line items depends on which document you choose (see chart below). The rest of the information is entered on the **EZ Start-Ocean Bill of Lading** screen.

Document Name	Line Item Source	Notes
Dock Receipt (with Product Detail)	EZ Start-Product Detail screen	Also available in the Consolidation Utility (P, E only).
Dock Receipt (with Product Summary)	EZ Start-Product Summary screen	

Inland Bill of Lading (C, P, E)

An inland bill of lading is a contract of carriage between the shipper and carrier that is used within the United States to move the goods to the port for export.

To complete the document, enter the contact information on the **EZ Start-Contacts** screen. The source of the line items depends on which document you choose (see chart below). The rest of the information is entered on the **EZ Start-Inland Bill of Lading** screen.

Document Name	Line Item Source	Notes
Inland Bill of Lading (with Product Detail)	EZ Start-Product Detail screen	Also available in the Consolidation Utility (P, E only).
Inland Bill of Lading (with Product Summary)	EZ Start-Product Summary screen	

Japan FTA Certificate of Origin (C, P, E)

The Japan Certificate of Origin is used for shipments between the United States and Japan if the goods qualify for preferential duties and taxes under the free trade agreement.

To complete the document, the contact names and addresses can be entered on the **EZ Start-Contacts** screen. The line items are pulled from the **EZ Start-Product Detail** screen, remarks are entered on the **EZ Start-Invoices** screen, and the rest of the fields are entered on the **EZ Start-Free Trade Agreements** screen.

This document is also available in the Consolidation Utility of Professional and Enterprise.

Korea FTA Certificate of Origin (C, P, E)

The Korea Certificate of Origin is used for shipments between the United States and Korea if the goods qualify for preferential duties and taxes under the free trade agreement.

To complete the document, the contact names and addresses can be entered on the **EZ Start-Contacts** screen. The line items are pulled from the **EZ Start-Product Detail** screen, remarks are entered on the **EZ Start-Invoices** screen, and the rest of the fields are entered on the **EZ Start-Free Trade Agreements** screen.

This document is also available in the Consolidation Utility of Professional and Enterprise.

Non-Dangerous Goods (P, E)

If an item could be suspected of being a dangerous good but actually does not meet the criteria of a dangerous good as defined by IATA or IMO, you may want to include a Non-Dangerous Good document to relieve any suspicion.

To complete the document, the contact names and addresses can be entered on the **EZ Start-Contacts** screen. Enter the air waybill number (if applicable) on the **EZ Start-Air Waybill** screen, and enter the order number on the **EZ Start-Invoices** screen. All other fields are entered on the **EZ Start-Non-Dangerous Goods** screen.

Document Title	Line Item Display	What Prints
Non-Dangerous Goods	No columns, free-form entry	Full Document
Non-Dangerous Goods (Data Only)	No columns, free-form entry	Data only for use with pre-printed form.
Non-Dangerous Goods (No Green Border)	No columns, free-form entry	Full document excluding green border to print on green border paper.

Ocean Bill of Lading

An ocean bill of lading serves as a contract between the exporter and the ocean carrier or its agent to transport merchandise as specified by the shipper. It serves as a receipt for the cargo and a contract stating where to deliver the goods, freight charges to be paid, and who the goods are to be consigned to.

To complete the document, enter the contact information on the **EZ Start-Contacts** screen, any special instructions are entered on the **EZ Start-Invoices** screen, and the transportation-related information on the **EZ Start-Carriers and Ports** screen. The shipment reference number is pulled from the **EZ Start-EEI** screen. The source of the line items depends on which document you choose (see chart below). The rest of the information is entered on the **EZ Start-Ocean Bill of Lading** screen.

The chart below explains the various ocean bills of lading documents.

Document Name	Version	Line Item Source	Notes
Ocean Bill of Lading – Master (with Product Detail)	P, E	EZ Start-Product Detail	Shows Freight Forwarder as exporter and Intermediate Consignee as consignee. Also available in the Consolidation Utility.
Ocean Bill of Lading – Master (with Product Summary)	P, E	EZ Start-Product Summary	Shows Freight Forwarder as exporter and Intermediate Consignee as consignee.

Ocean Bill of Lading – Rated (with Product Detail)	C, P, E	EZ Start-Product Detail	Shows Freight Forwarder as forwarding agent. Also available in the Consolidation Utility (P, E only).
Ocean Bill of Lading – Rated (with Product Summary)	C, P, E	EZ Start-Product Summary	Shows Freight Forwarder as forwarding agent.
Ocean Bill of Lading – Unrated (with Product Detail)	P, E	EZ Start-Product Detail	Does not show freight charges. Shows Freight Forwarder as forwarding agent. Also available in the Consolidation Utility.
Ocean Bill of Lading – Unrated (with Product Summary)	P, E	EZ Start-Product Summary	Does not show freight charges. Shows Freight Forwarder as forwarding agent.

Packing List (C, P, E)

The packing list confirms the contents of the shipment by container and indicates weights, measurements and piece count.

To complete the packing list, enter the contact information on the **EZ Start-Contacts** screen. The line items are pulled from the **EZ Start-Product Detail** screen, and the invoice information (such as invoice date and number, order number, special instructions, etc.) is pulled from the **EZ Start-Invoices** screen. Enter the exporting carrier on the **EZ Start-Carriers and Ports** screen. The rest of the information is entered on the **EZ Start-Packing List** screen.

On the **EZ Start-Packing List** screen, be sure to add as many packages as you need and to load them with the correct line items. Click here for instructions on creating the packing list.

There are two versions of the Packing List on the **EZ Start-Preview/Print/Email** screen. The first Packing List shows weights and dimensions by container. The Packing List—Landscape shows the weights and dimensions by line item. To best utilize this version of the Packing List, check the **Calculate Packing List Weight** box on the **Admin-Global Settings** screen.

These documents are also available in the Consolidation Utility of Professional and Enterprise.

Panama TPA Certificate of Origin (C, P, E)

The Panama Certificate of Origin is used for shipments between the United States and Panama if the goods qualify for preferential duties and taxes under the trade promotion agreement.

To complete the document, the contact names and addresses can be entered on the **EZ Start-Contacts** screen. The line items are pulled from the **EZ Start-Product Detail** screen, and the rest of the fields are entered on the **EZ Start-Free Trade Agreements** screen. You also have the option to display the Commercial Invoices Special Instructions by checking the box on the **Tools-Customize Documents** screen for the Panama TPA Certificate of Origin.

Peru TPA Certificate of Origin (C, P, E)

The Peru Certificate of Origin is used for shipments between the United States and Peru if the goods qualify for preferential duties and taxes under the trade promotion agreement.

To complete the document, the contact names and addresses can be entered on the **EZ Start-Contacts** screen. The line items are pulled from the **EZ Start-Product Detail** screen, and the rest of the fields are entered on the **EZ Start-Free Trade Agreements** screen. You also have the option to display the Commercial Invoices Special Instructions by checking the box on the **Tools-Customize Documents** screen for the Peru TPA Certificate of Origin.

Proforma Invoice

The Proforma Invoice is a quotation outlining the possible sale. If the order results, the commercial invoice will closely resemble the proforma invoice.

To complete the document, the contact names and addresses can be entered on the **EZ Start-Contacts** screen. The transportation-related information comes from the **EZ Start-Carriers and Ports** screen. The line items come from the **EZ Start-Product Detail** screen, and the rest of the information comes from the **EZ Start-Invoices** screen.

These documents are also available in the Consolidation Utility of Professional and Enterprise.

Document Title	Version	Language	Notes
Proforma Invoice	C, P, E	English	
Proforma Invoice (French)	P, E	French	Field labels are in French. Labels can be modified on the Tools tab, Customize Documents screen. Data is not translated.
Proforma Invoice (Landscape)	C, P, E	English	Includes more contact types and more line item detail than the standard Proforma Invoice.
Proforma Invoice (Spanish)	P, E	Spanish	Field labels are in Spanish. Labels can be modified on the Tools tab, Customize Documents screen. Data is not translated.

Security Endorsement (C, P, E)

If you are not a known shipper with some airlines, they may request a Federal Aviation Administration (FAA) Security Endorsement that requires two forms of ID. To complete the document, enter your information on the **EZ Start- Security Endorsement** screen.

Shipment Log (P, E)

You can use the shipment log to make sure you are following your Export Compliance Program (ECP). Enter the steps of your ECP on the **Databases-Shipment Log Items** screen. Then with each shipment, log the date each step was completed along with the initials of the person doing the work. When you print the document, it will show the completed steps along with the exporter and ultimate consignee from the **EZ Start-Contacts** screen.

Shipper's Letter of Instruction (C, P, E)

Shipping Solutions includes two types of Shipper's Letters of Instruction (SLI). One type is used as a cover letter to convey specific instructions from the exporter to the agent, usually an international freight forwarder. The second

type of SLI is used to provide to your freight forwarder all the information needed to file your Electronic Export Information (EEI) with AESDirect.

To complete the cover letter version of the document, enter the contact names and addresses on the **EZ Start-Contacts** screen. The source of the line items depends on which document you choose (see chart below). The rest of the information comes from the **EZ Start-Shipper's Letter of Instruction** screen.

To complete the AES filing version of the document, enter the contact names and addresses on the **EZ Start-Contacts** screen. The transportation-related information comes from the **EZ Start-Carriers and Ports** screen, and the line items come from the **EZ Start-Product Detail** screen. Enter the date and any special instructions on the **EZ Start-Shipper's Letter of Instruction** screen. The USPPI Reference Number will be pulled from either the **EZ Start-Air Waybill** screen or the **EZ Start-Ocean Bill of Lading** screen depending on your mode of transport. The rest of the fields are completed on the **EZ Start-EEI** screen.

The chart below shows the four SLIs available in Shipping Solutions.

Document Title	Type	Line Item Source	Notes
Shipper's Letter of Instruction (in NCBFAA format)	AES Filing	EZ Start-Product Detail with line items combined by Schedule B and D/F Origin.	Recommended by the National Customs Brokers & Forwarders Association. Also available in the Consolidation Utility (P, E only).
Shipper's Letter of Instruction (in SED format)	AES Filing	EZ Start-Product Detail with line items combined by Schedule B and D/F Origin.	Based on the old Shipper's Export Declaration, this document is not as complete as the NCBFAA format. Also available in the Consolidation Utility (P, E only).
Shipper's Letter of Instruction (with Product Detail)	Cover Letter	EZ Start-Product Detail	Also available in the Consolidation Utility (P, E only).
Shipper's Letter of Instruction (with Product Summary)	Cover Letter	EZ Start-Product Summary	

Singapore FTA Certificate of Origin (C, P, E)

The Singapore Certificate of Origin is used for shipments between the United States and Korea if the goods qualify for preferential duties and taxes under the free trade agreement.

To complete the document, the contact names and addresses can be entered on the **EZ Start-Contacts** screen. The line items are pulled from the **EZ Start-Product Detail** screen, remarks are entered on the **EZ Start-Invoices** screen, and the rest of the fields are entered on the **EZ Start-Free Trade Agreements** screen.

This document is also available in the Consolidation Utility of Professional and Enterprise.

USMCA Certification of Origin (C, P, E)

The USMCA Certification of Origin is used for shipments between the United States and either Canada or Mexico if the goods qualify for preferential duties and taxes under the free trade agreement.

To complete the document, the contact names and addresses can be entered on the **EZ Start-Contacts** screen. The line items are pulled from the **EZ Start-Product Detail** screen, and the rest of the fields are entered on the **EZ Start-Free Trade Agreements** screen.

These documents are also available in the Consolidation Utility of Professional and Enterprise.

Document Title	Version	Language	Notes
USMCA	C, P, E	English	Most U.S. exporters will use this form. Labels can be modified on the Tools tab, Customize Documents screen.
USMCA- Canada (English)	C, P, E	English	Labels can be modified on the Tools tab, Customize Documents screen.
USMCA-Canada (French)	C, P, E	French	Field labels are in French. Labels can be modified on the Tools tab, Customize Documents screen. Data is not translated.
USMCA-Mexico	C, P, E	Spanish	Field labels are in Spanish. Labels can be modified on the Tools tab, Customize Documents screen. Data is not translated.

Incoterms® 2020

Maintained by the International Chamber of Commerce (ICC), this codification of terms is used in foreign trade contracts to define which parties incur the costs and at what specific point the costs are incurred.

Terms for any mode of transportation:

EXW—Ex-Works, named place.

FCA—Free Carrier At, named place.

CPT—Carriage Paid To, named place of destination.

CIP—Carriage and Insurance Paid To, named place of destination.

DAP—Delivered at Place, named place of destination.

DPU—Delivered at Place Unloaded, named place of destination.

DDP—Delivery Duty Paid, named place of destination.

Terms for sea and inland waterway transport:

FAS—Free Alongside Ship, named ocean port of shipment.

FOB—Free on Board vessel, named ocean port of shipment.

CFR—Cost and Freight, named ocean port of destination.

CIF—Cost, Insurance and Freight, named ocean port of destination.

You'll find an Incoterms 2020 chart of responsibility at www.shippingsolutionssoftware.com/incoterms-chart-of-responsibilities.

Export Information Codes

When filing your Electronic Export Information (EEI) with AES, you must select the proper export code. The most common code is "OS—All other exports." Here is a list and description of all the export codes as they appear in the Foreign Trade Regulations (15 CFR 30):

TP—Temporary exports of domestic merchandise

IP—Shipments of merchandise imported under a Temporary Import Bond for further manufacturing or processing

IR—Shipments of merchandise imported under a Temporary Import Bond for repair

CH—Shipments of goods donated for charity

FS—Foreign Military Sales

ZD—North American Free Trade Agreements (NAFTA) duty deferral shipments

OS—All other exports

HV—Shipments of personally owned vehicles

HH—Household and personal effects

TE—Temporary exports to be returned to the United States

TL— Merchandise leased for less than a year

IS— Shipments of merchandise imported under a Temporary Import Bond for return in the same condition

CR—Shipments moving under a carnet

GP— U.S. Government shipments

MS—Shipments consigned to the U.S. Armed Forces

GS—Shipments to U.S. Government agencies for their use

UG—Gift parcels under Bureau of Industry and Security License Exception GFT

DD—Other exemptions:

- Currency
- Airline tickets
- Bank notes
- Internal revenue stamps
- State liquor stamps
- Advertising literature
- Shipments of temporary imports by foreign entities for their use

IW—International water shipments

CI—Impelled shipments of goods donated for relief or charity

FI—Impelled Foreign Military Sales Program

OI—All other exports (impelled) (For Manifest Use Only by AES Carriers)

Export License Types and Codes

Certain products require an export license before they can be exported to certain countries. Here is a list of license types organized by agency as they appear in the Foreign Trade Regulations (15 CFR 30)-AESTIR Appendix F:

Licensing Agency	License Type	License Description	License No. / Exemption
Department of Commerce, Bureau of Industry & Security	C30	Licenses Issued by BIS Authorizing an Export, Re-export, or Other Regulated Activity (License value required)	License No.
	C33	No License Required (NLR), Part 758 (All others, including Anti-Terrorism controls only)	NLR
	C35	Limited Value Shipments, Part 740.3	LVS
	C36	Shipments to B Countries, Part 740.4	GBS
	C38	Restrict Technology and Software, Part 740.6	TSR
	C40	Temporary Imports, Exports, And Re-Exports, Part 740.9	TMP
	C41	Servicing and Replacement of Parts and Equipment, Part 740.10	RPL
	C42	Government and International Organizations, Part 740.11	GOV
	C43	Gift Parcels and Humanitarian Donations, Part 740.12	GFT
	C44	Technology and Software - Unrestricted Part 740.13	TSU
	C45	Baggage, Part 740.14	BAG
	C46	Aircraft and Vessels, Part 740.15	AVS
	C50	Encryption Commodities and Software, Part 740.17	ENC
	C51	License Exception Agricultural Commodities, Part 740.18	License No.
	C53	Computers, Part 740.7	APP
	C54	Short Supply Western Red Cedar, Part 754.4	SS-WRC
	C57	Authorization for Validated End-User	VEU
	C58	Consumer Communication Devices	CCD
	C59	Strategic Trade Authorization	STA
	C60	Exports that fall under “600 series” ECCNs with a paragraph “.y.”	DY6
	C62	Support for the Cuban People	SCP
	C63	.y components under 0A501.y	YFA
	C64	Authorized Cybersecurity	ACE
	C65	Temporary General License	TGL

	C66	Supply Chain Authorization Letter	SCAL
	C67	Notified Advanced Computing (with notification required)	NAC with confirmation number
	C68	Notified Advanced Computing (no notification required)	NAC
	C69	License Exception Medical Devices	MED
	C70	Implemented Export Control	IEC
	C71	High Bandwidth Memory	HBM
	C72	Restricted Fabrication Facility	RFF
	C73	License Exception Artificial Intelligence Authorization	AIA
	C74	Advanced Compute Manufacturing	ACM
	C75	License Exception Low Processing Performance	LPP
	C76	Universal Validated End User	UVEU
	C77	National Validated End User	NVEU
	C78	Syria Peace & Prosperity	SPP
	C79	Fab License (FAB)	License No.
Nuclear Regulatory Commission	N01	Nuclear Regulatory Commission (NRC) Form 250/250A	License No.
	N02	NRC General Export License	CFR Citation Number
Department of State, Directorate of Defense Trade Controls (DDTC)	SAG	Agreements	N/A
	SAU	Australia ITAR Exemptions	Community Member No.
	SCA	Canadian ITAR Exemptions	N/A
	SGB	United Kingdom ITAR Exemptions	Community Member No.
	S00	License Exemption Citation	N/A
	S05	DSP5, Permanent export of unclassified defense articles and services (License value required)	License No.
	S61	DSP 61, Temporary import of unclassified articles (License value required)	License No.
	S73	DSP73, Temporary export of unclassified articles (License value required)	License No.
	S85	DSP85, Temporary or permanent import or export of classified articles (License value required)	License No.
	S94	DSP 94, Foreign Military Sales (License value required)	Case ID
Department of Treasury, Office of Foreign Assets Control (OFAC)	T10	OFAC Specific License	Case ID
	T11	OFAC General Export License	CFR Citation or Federal Register Citation or

			General License Number
	T12	Kimberley Process Certificate Number (License value required)	KPC No.
Other License Types	OPA	Other Partnership Agency License	License No. or OPA
Department of Energy, National Nuclear Security Administration	E01	Atomic Energy Act Authorization/Licenses	AEA
Voluntary Self Disclosures	VDC	Commerce Department Voluntary Self-Disclosure	N/A
	VDS	State Department Voluntary Disclosure	N/A
	VDO	Other Partner Government Agency Voluntary Disclosure	N/A

Database File Structure

This part of the User Guide explains how you can import your list of contacts and products into the various Shipping Solutions databases. The following charts include more specific details about the table structure—including field names, types and size—for each of the databases.

For a definition of the type of information that should appear in each field, reference the specific information about each of these databases located near the beginning of this User Guide.

Contacts Databases

This table structure applies to all contact databases including the Exporters, Ultimate Consignee, Intermediate Consignee, Freight Forwarder, Bill To, and Miscellaneous databases.

Shipping Solutions Fields	Field Length	Column Names	Format
Contact Tax ID Number	50	contact_id_num	
Contact Tax ID Type	50	contact_id_type	**E** for EIN, **T** for Foreign, **D** for D-U-N-S
Contact Company	50	contact_name	
Contact Address Line 1	50	contact_add_1	
Contact Address Line 2	50	contact_add_2	
Contact City	50	contact_city	
Contact State	25	contact_state	2 digit state code
Contact Country	2	contact_country	2 digit country code
Contact Postal Code	50	contact_postal_code	
Contact First Name	50	contact_name_first	
Contact Last Name	50	contact_name_last	
Contact Title	50	contact_title	
Contact Phone	30	contact_phone_num	
Contact Fax	30	contact_fax_num	
Contact Email	50	contact_email	
Contact Account No.	50	contact_acct_num	
Ultimate Consignee Type (only for ultimate consignees)	1	contact_user2	**D** for Direct Consumer; **G** for Government Entity; **O** for Other/Unknown; **R** for Reseller

Products Database

Shipping Solutions Fields	Field Length	Column Names	Format
Product ID	50	prod_id	
Product Description	4000	prod_desc	
Schedule B Description	4000	schbdesc	
Sales Unit of Measure	25	sales_unit_of_measure	
Unit of Measure 1 (AES)	20	unit_of_measure_1	Valid AES code
Unit of Measure 2 (AES)	20	unit_of_measure_2	Valid AES code
Gross Weight	8	sed_gross_weight	
Unit Price	8	unit_price	
HTS Code	12	hts_code	Number excluding periods
License Type	50	license_type	Valid AES code
License Number	50	license_num	
Domestic Foreign Flag	1	domestic_foreign_flag	D for Domestic, F for Foreign
Producer-Legacy field, use Products Free Trade instead	5	nafta_producer	Yes, No1, No2, or No3
Preference Criteria-Legacy field, use Products Free Trade instead	3	preference_criteria	A,B,C,D1,D2,E,FA or FB
Net Cost-Legacy field, use Products Free Trade instead	15	net_cost	
FTA Country of Origin-Legacy field, use Products Free Trade instead	3	nafta_c_of_o	US, MX, CA or JNT
NetWeight	8	NetWeight	
ECCN	50	ECCN	
Country of Origin	2	country_of_origin	2 digit country code
Country of Origin Full Name	50	country_of_origin_fullname	Must map this along with the field above.
Inlandbl Hazardous Flag	1	inlandbl_hazardous_flag	True or False
Israeli COO Criterion	50	israeli_coo_criterion	
DDTC Exemption Number	50	odtc_exempt_num	Valid AES code
DDTC Registration Number	50	odtc_registr_num	
DDTC Quantity	50	odtc_quantity	
DDTC Certified Party Indicator	1	odtc_certi_indicator	True or False
DDTC Significant Military Equipment	1	odtc_eqp_indicator	True or False
USML Category Code	50	odtc_catg_code	Valid AES code

DDTC Unit of Measure	50	odtc_uofm	Valid AES code
AES License Value	15	license_value	
IATA UN Number	4	iata_un_number	
IATA Proper Shipping Name	250	iata_psn	
IATA Classification	50	iata_classification	
IATA Packing Group	50	iata_packing_group	
IATA Type of Packing	250	iata_qty_type_pkg	
IATA Technical Name	250	iata_technical	
IMO UN Number	4	imo_un_number	
IMO Proper Shipping Name	250	imo_psn	
IMO Classification	50	imo_classification	
IMO Packing Group	50	imo_packing_group	
IMO Kind of Packages	250	imo_qty_type_pkg	
IMO Technical Name	250	imo_technical	
IMO Additional Description	4000	imo_additional_desc	
IMO Gross Weight/Volume	15	imo_gross_wt_vol	
IMO Net Weight/Volume	15	imo_net_wt_vol	
IMO Cubic Meters	15	imo_cubic_m	

Products Free Trade Database

Shipping Solutions Fields	**Field Length**	**Column Names**	**Format**
FTA Agreement ID	n/a	agreement_id	Integer
Product ID	50	prod_id	
FTA Origin/Preference Criteria ID	2	fta_pref_crit_id	See FTA Code Chart
FTA Preference Criteria Description	15	fta_pref_crit	This field is not required if the ID is entered.
FTA Country of Origin ID	2	fta_c_of_o_id	See FTA Code Chart
FTA Country of Origin	3	fta_c_of_o	This field is not required if the ID is entered.
FTA Producer ID	2	fta_producer_id	See FTA Code Chart
FTA Producer	3	fta_producer	This field is not required if the ID is entered.
FTA Net Cost or Other Criteria	30	fta_net_cost	See FTA Code Chart

Data Exchange Manager File Structure

Instructions here explain how to set up Shipping Solutions Professional's Data Exchange Manager, so you can link Shipping Solutions with your accounting, order entry or ERP system. As part of that process, you must map the data fields from your accounting, ERP or order-entry system to the fields in Shipping Solutions Professional.

Below is a detailed file layout of the Shipping Solutions fields available for mapping. The columns are defined as follows:

1. The **Text File** column defines whether the field is in the header or detail text file.
2. The **Mapping Table** column defines in which mapping table the field is located.
3. The **Shipping Solutions Professional Field** column is the user friendly name of the field.
4. The **System Field Name** column is the system field name. You do not need to use this name if you use the **Setup Data Exchange Manager** screen.
5. The **Size** column shows the length of the field.
6. The **EZ Start Screen** column indicates on which **EZ Start** screen the field appears.
7. The **Format** column shows the specific format of the field if there is one.

Text File	Mapping Table	Shipping Solutions Professional Field	System Field Name	Size	EZ Start Screen	Format
Header	Contacts	Exporter ID Type	contact_id_type	50	Contacts	E for EIN, T for Foreign, D for D-U-N-S
Header	Contacts	Exporter ID Number	contact_id_num	50	Contacts	
Header	Contacts	Exporter Company	contact_name	50	Contacts	
Header	Contacts	Exporter Address 1	contact_add_1	50	Contacts	
Header	Contacts	Exporter Address 2	contact_add_2	50	Contacts	
Header	Contacts	Exporter City	contact_city	50	Contacts	
Header	Contacts	Exporter State	contact_state	3	Contacts	2- or 3-digit state code
Header	Contacts	Exporter Country	contact_country	2	Contacts	2-digit country code
Header	Contacts	Exporter Postal Code	contact_postal_code	50	Contacts	
Header	Contacts	Exporter First Name	contact_name_first	50	Contacts	

Header	Contacts	Exporter Last Name	contact_name_last	50	Contacts	
Header	Contacts	Exporter Title	contact_title	50	Contacts	
Header	Contacts	Exporter Phone	contact_phone_num	50	Contacts	
Header	Contacts	Exporter Fax	contact_fax_num	50	Contacts	
Header	Contacts	Exporter Email	contact_email	50	Contacts	
Header	Contacts	Exporter Account Number	contact_acct_num	50	Contacts	
Header	Contacts	Ultimate Consignee ID Type	contact_id_type	50	Contacts	E for EIN, T for Foreign, D for D-U-N-S
Header	Contacts	Ultimate Consignee ID Number	contact_id_num	50	Contacts	
Header	Contacts	Ultimate Consignee Company	contact_name	50	Contacts	
Header	Contacts	Ultimate Consignee Address 1	contact_add_1	50	Contacts	
Header	Contacts	Ultimate Consignee Address 2	contact_add_2	50	Contacts	
Header	Contacts	Ultimate Consignee City	contact_city	50	Contacts	
Header	Contacts	Ultimate Consignee State	contact_state	3	Contacts	2- or 3-digit state code
Header	Contacts	Ultimate Consignee Country	contact_country	2	Contacts	2-digit country code
Header	Contacts	Ultimate Consignee Postal Code	contact_postal_code	50	Contacts	
Header	Contacts	Ultimate Consignee First Name	contact_name_first	50	Contacts	
Header	Contacts	Ultimate Consignee Last Name	contact_name_last	50	Contacts	
Header	Contacts	Ultimate Consignee Title	contact_title	50	Contacts	

Header	Contacts	Ultimate Consignee Phone	contact_phone_num	50	Contacts	
Header	Contacts	Ultimate Consignee Fax	contact_fax_num	50	Contacts	
Header	Contacts	Ultimate Consignee Email	contact_email	50	Contacts	
Header	Contacts	Ultimate Consignee Account Number	contact_acct_num	50	Contacts	
Header	Contacts	Ultimate Consignee Type (AES)	contact_user2	1	Contacts	**D** for Direct Consumer; **G** for Government Entity; **O** for Other/Unknown; **R** for Reseller
Header	Contacts	Freight Forwarder ID Type	contact_id_type	50	Contacts	E for EIN, T for Foreign, D for D-U-N-S
Header	Contacts	Freight Forwarder ID Number	contact_id_num	50	Contacts	
Header	Contacts	Freight Forwarder Company	contact_name	50	Contacts	
Header	Contacts	Freight Forwarder Address 1	contact_add_1	50	Contacts	
Header	Contacts	Freight Forwarder Address 2	contact_add_2	50	Contacts	
Header	Contacts	Freight Forwarder City	contact_city	50	Contacts	
Header	Contacts	Freight Forwarder State	contact_state	3	Contacts	2- or 3-digit state code
Header	Contacts	Freight Forwarder Country	contact_country	2	Contacts	2-digit country code

Header	Contacts	Freight Forwarder Postal Code	contact_postal_code	50	Contacts	
Header	Contacts	Freight Forwarder First Name	contact_name_first	50	Contacts	
Header	Contacts	Freight Forwarder Last Name	contact_name_last	50	Contacts	
Header	Contacts	Freight Forwarder Title	contact_title	50	Contacts	
Header	Contacts	Freight Forwarder Phone	contact_phone_num	50	Contacts	
Header	Contacts	Freight Forwarder Fax	contact_fax_num	50	Contacts	
Header	Contacts	Freight Forwarder Email	contact_email	50	Contacts	
Header	Contacts	Freight Forwarder Account Number	contact_acct_num	50	Contacts	
Header	Contacts	Intermediate Consignee ID Type	contact_id_type	50	Contacts	E for EIN, T for Foreign, D for D-U-N-S
Header	Contacts	Intermediate Consignee ID Number	contact_id_num	50	Contacts	
Header	Contacts	Intermediate Consignee Company	contact_name	50	Contacts	
Header	Contacts	Intermediate Consignee Address 1	contact_add_1	50	Contacts	
Header	Contacts	Intermediate Consignee Address 2	contact_add_2	50	Contacts	
Header	Contacts	Intermediate Consignee City	contact_city	50	Contacts	
Header	Contacts	Intermediate Consignee State	contact_state	3	Contacts	2- or 3-digit state code
Header	Contacts	Intermediate Consignee Country	contact_country	2	Contacts	2-digit country code

Header	Contacts	Intermediate Consignee Postal Code	contact_postal_code	50	Contacts	
Header	Contacts	Intermediate Consignee First Name	contact_name_first	50	Contacts	
Header	Contacts	Intermediate Consignee Last Name	contact_name_last	50	Contacts	
Header	Contacts	Intermediate Consignee Title	contact_title	50	Contacts	
Header	Contacts	Intermediate Consignee Phone	contact_phone_num	50	Contacts	
Header	Contacts	Intermediate Consignee Fax	contact_fax_num	50	Contacts	
Header	Contacts	Intermediate Consignee Email	contact_email	50	Contacts	
Header	Contacts	Intermediate Consignee Account Number	contact_acct_num	50	Contacts	
Header	Contacts	BillTo ID Type	contact_id_type	50	Contacts	E for EIN, T for Foreign, D for D-U-N-S
Header	Contacts	BillTo ID Number	contact_id_num	50	Contacts	
Header	Contacts	BillTo Company	contact_name	50	Contacts	
Header	Contacts	BillTo Address 1	contact_add_1	50	Contacts	
Header	Contacts	BillTo Address 2	contact_add_2	50	Contacts	
Header	Contacts	BillTo City	contact_city	50	Contacts	
Header	Contacts	BillTo State	contact_state	3	Contacts	2- or 3-digit state code
Header	Contacts	BillTo Country	contact_country	2	Contacts	2-digit country code
Header	Contacts	BillTo Postal Code	contact_postal_code	50	Contacts	
Header	Contacts	BillTo First Name	contact_name_first	50	Contacts	
Header	Contacts	BillTo Last Name	contact_name_last	50	Contacts	
Header	Contacts	BillTo Title	contact_title	50	Contacts	

Header	Contacts	BillTo Phone	contact_phone_num	50	Contacts	
Header	Contacts	BillTo Fax	contact_fax_num	50	Contacts	
Header	Contacts	BillTo Email	contact_email	50	Contacts	
Header	Contacts	BillTo Account Number	contact_acct_num	50	Contacts	
Header	Contacts	Notify Party ID Type	contact_id_type	50	Contacts	E for EIN, T for Foreign, D for D-U-N-S
Header	Contacts	Notify Party ID Number	contact_id_num	50	Contacts	
Header	Contacts	Notify Party Company	contact_name	50	Contacts	
Header	Contacts	Notify Party Address 1	contact_add_1	50	Contacts	
Header	Contacts	Notify Party Address 2	contact_add_2	50	Contacts	
Header	Contacts	Notify Party City	contact_city	50	Contacts	
Header	Contacts	Notify Party State	contact_state	3	Contacts	2- or 3-digit state code
Header	Contacts	Notify Party Country	contact_country	2	Contacts	2-digit country code
Header	Contacts	Notify Party Postal Code	contact_postal_code	50	Contacts	
Header	Contacts	Notify Party First Name	contact_name_first	50	Contacts	
Header	Contacts	Notify Party Last Name	contact_name_last	50	Contacts	
Header	Contacts	Notify Party Title	contact_title	50	Contacts	
Header	Contacts	Notify Party Phone	contact_phone_num	50	Contacts	
Header	Contacts	Notify Party Fax	contact_fax_num	50	Contacts	
Header	Contacts	Notify Party Email	contact_email	50	Contacts	
Header	Contacts	Notify Party Account Number	contact_acct_num	50	Contacts	
Header	Contacts	FTA Importer ID Type	contact_id_type	50	Contacts	E for EIN, T for Foreign, D for D-U-N-S

Header	Contacts	FTA Importer ID Number	contact_id_num	50	Contacts	
Header	Contacts	FTA Importer Company	contact_name	50	Contacts	
Header	Contacts	FTA Importer Address Line 1	contact_add_1	50	Contacts	
Header	Contacts	FTA Importer Address Line 2	contact_add_2	50	Contacts	
Header	Contacts	FTA Importer City	contact_city	50	Contacts	
Header	Contacts	FTA Importer State	contact_state	3	Contacts	2- or 3-digit state code
Header	Contacts	FTA Importer Country	contact_country	2	Contacts	2-digit country code
Header	Contacts	FTA Importer Postal Code	contact_postal_code	50	Contacts	
Header	Contacts	FTA Importer Account Number	contact_acct_num	50	Contacts	
Header	Contacts	FTA Importer Email	Contact_email	50	Contacts	
Header	Contacts	FTA Producer ID Type	contact_id_type	50	Contacts	E for EIN, T for Foreign, D for D-U-N-S
Header	Contacts	FTA Producer ID Number	contact_id_num	50	Contacts	
Header	Contacts	FTA Producer Company	contact_name	50	Contacts	
Header	Contacts	FTA Producer Address Line 1	contact_add_1	50	Contacts	
Header	Contacts	FTA Producer Address Line 2	contact_add_2	50	Contacts	
Header	Contacts	FTA Producer City	contact_city	50	Contacts	
Header	Contacts	FTA Producer State	contact_state	3	Contacts	2- or 3-digit state code
Header	Contacts	FTA Producer Country	contact_country	2	Contacts	2-digit country code
Header	Contacts	FTA Producer Postal Code	contact_postal_code	50	Contacts	
Header	Contacts	FTA Producer Account Number	contact_acct_num	50	Contacts	

Header	Contacts	FTA Producer Email	Contact_email	50	Contacts	
Header	Contacts	FTA Certify Company	contact_name	50	Contacts	
Header	Contacts	FTA Certify Address Line 1	contact_add_1	50	Contacts	
Header	Contacts	FTA Certify Address Line 2	contact_add_2	50	Contacts	
Header	Contacts	FTA Certify City	contact_city	50	Contacts	
Header	Contacts	FTA Certify State	contact_state	3	Contacts	2- or 3-digit state code
Header	Contacts	FTA Certify Postal Code	contact_postal_code	2	Contacts	2-digit country code
Header	Contacts	FTA Certify First Name	contact_name_first	50	Contacts	
Header	Contacts	FTA Certify Last Name	contact_name_last	50	Contacts	
Header	Contacts	FTA Certify Title	contact_title	50	Contacts	
Header	Contacts	FTA Certify Phone	contact_phone_num	50	Contacts	
Header	Contacts	FTA Certify Fax	contact_fax_num	50	Contacts	
Header	Contacts	FTA Certify Email	Contact_email	50	Contacts	
Header	Contacts	CCI Purchaser ID Type	contact_id_type	50	Contacts	E for EIN, T for Foreign, D for D-U-N-S
Header	Contacts	CCI Purchaser ID Number	contact_id_num	50	Contacts	
Header	Contacts	CCI Purchaser Company	contact_name	50	Contacts	
Header	Contacts	CCI Purchaser Address Line 1	contact_add_1	50	Contacts	
Header	Contacts	CCI Purchaser Address Line 2	contact_add_2	50	Contacts	
Header	Contacts	CCI Purchaser City	contact_city	50	Contacts	
Header	Contacts	CCI Purchaser State	contact_state	3	Contacts	2- or 3-digit state code
Header	Contacts	CCI Purchaser Country	contact_country	2	Contacts	2-digit country code

Header	Contacts	CCI Purchaser Postal Code	contact_postal_code	50	Contacts	
Header	Contacts	CCI Purchaser Account Number	contact_acct_num	50	Contacts	
Header	Contacts	CCI Exporter ID Type	contact_id_type	50	Contacts	E for EIN, T for Foreign, D for D-U-N-S
Header	Contacts	CCI Exporter ID Number	contact_id_num	50	Contacts	
Header	Contacts	CCI Exporter Company	contact_name	50	Contacts	
Header	Contacts	CCI Exporter Address Line 1	contact_add_1	50	Contacts	
Header	Contacts	CCI Exporter Address Line 2	contact_add_2	50	Contacts	
Header	Contacts	CCI Exporter City	contact_city	50	Contacts	
Header	Contacts	CCI Exporter State	contact_state	3	Contacts	2- or 3-digit state code
Header	Contacts	CCI Exporter Country	contact_country	2	Contacts	2-digit country code
Header	Contacts	CCI Exporter Postal Code	contact_postal_code	50	Contacts	
Header	Contacts	CCI Exporter Account Number	contact_acct_num	50	Contacts	
Header	Contacts	CCI Originator ID Type	contact_id_type	50	Contacts	E for EIN, T for Foreign, D for D-U-N-S
Header	Contacts	CCI Originator ID Number	contact_id_num	50	Contacts	
Header	Contacts	CCI Originator Company	contact_name	50	Contacts	
Header	Contacts	CCI Originator Address Line 1	contact_add_1	50	Contacts	
Header	Contacts	CCI Originator Address Line 2	contact_add_2	50	Contacts	
Header	Contacts	CCI Originator City	contact_city	50	Contacts	
Header	Contacts	CCI Originator State	contact_state	3	Contacts	2- or 3-digit state code

Header	Contacts	CCI Originator Country	contact_country	2	Contacts	2-digit country code
Header	Contacts	CCI Originator Postal Code	contact_postal_code	50	Contacts	
Header	Contacts	CCI Originator Account Number	contact_acct_num	50	Contacts	
Header	Contacts	IBL Consignee Company	contact_name	50	Contacts	
Header	Contacts	IBL Consignee Address 1	contact_add_1	50	Contacts	
Header	Contacts	IBL Consignee Address 2	contact_add_2	50	Contacts	
Header	Contacts	IBL Consignee City	contact_city	50	Contacts	
Header	Contacts	IBL Consignee State	contact_state	2	Contacts	
Header	Contacts	IBL Consignee Postal Code	contact_postal_code	20	Contacts	
Header	Contacts	IBL Consignee First Name	contact_name_first	50	Contacts	
Header	Contacts	IBL Consignee Last Name	contact_name_last	50	Contacts	
Header	Contacts	IBL Bill To Company	contact_name	50	Contacts	
Header	Contacts	IBL Bill To Address 1	contact_add_1	50	Contacts	
Header	Contacts	IBL Bill To Address 2	contact_add_2	50	Contacts	
Header	Contacts	IBL Bill To City	contact_city	50	Contacts	
Header	Contacts	IBL Bill To State	contact_state	2	Contacts	
Header	Contacts	IBL Bill To Postal Code	contact_postal_code	50	Contacts	
Header	Contacts	IBL Bill To First Name	contact_name_first	50	Contacts	
Header	Contacts	IBL Bill To Last Name	contact_name_last	50	Contacts	
Header	Contacts	OBL Also Notify Company	contact_name	50	Contacts	
Header	Contacts	OBL Also Notify Address 1	contact_add_1	50	Contacts	
Header	Contacts	OBL Also Notify Address 2	contact_add_2	50	Contacts	
Header	Contacts	OBL Also Notify City	contact_city	50	Contacts	
Header	Contacts	OBL Also Notify State	contact_state	2	Contacts	

Header	Contacts	OBL Also Notify Country	contact_country	2	Contacts	
Header	Contacts	OBL Also Notify Postal Code	contact_postal_code	20	Contacts	
Header	Contacts	OBL Also Notify First Name	contact_name_first	50	Contacts	
Header	Contacts	OBL Also Notify Last Name	contact_name_last	50	Contacts	
Header	Contacts	Forwarding Agent ID Type	contact_id_type	50	Contacts	E for EIN, T for Foreign, D for D-U-N-S
Header	Contacts	Forwarding Agent ID Number	contact_id_num	50	Contacts	
Header	Contacts	Forwarding Agent Company	contact_name	50	Contacts	
Header	Contacts	Forwarding Agent Address 1	contact_add_1	50	Contacts	
Header	Contacts	Forwarding Agent Address 2	contact_add_2	50	Contacts	
Header	Contacts	Forwarding Agent City	contact_city	50	Contacts	
Header	Contacts	Forwarding Agent State	contact_state	3	Contacts	2- or 3-digit state code
Header	Contacts	Forwarding Agent Country	contact_country	2	Contacts	2-digit country code
Header	Contacts	Forwarding Agent Postal Code	contact_postal_code	50	Contacts	
Header	Contacts	Forwarding Agent First Name	contact_name_first	50	Contacts	
Header	Contacts	Forwarding Agent Last Name	contact_name_last	50	Contacts	
Header	Contacts	Forwarding Agent Title	contact_title	50	Contacts	
Header	Contacts	Forwarding Agent Phone	contact_phone_num	50	Contacts	
Header	Contacts	Forwarding Agent Fax	contact_fax_num	50	Contacts	
Header	Contacts	Forwarding Agent Email	contact_email	50	Contacts	

Header	Contacts	Forwarding Agent Account Number	contact_acct_num	50	Contacts	
Header	Contacts	Freight Location Company ID Type	contact_id_type	50	Contacts	E for EIN, T for Foreign, D for D-U-N-S
Header	Contacts	Freight Location Company ID Number	contact_id_num	50	Contacts	
Header	Contacts	Freight Location Company Name	contact_name	50	Contacts	
Header	Contacts	Freight Location Company Address 1	contact_add_1	50	Contacts	
Header	Contacts	Freight Location Company Address 2	contact_add_2	50	Contacts	
Header	Contacts	Freight Location Company City	contact_city	50	Contacts	
Header	Contacts	Freight Location Company State	contact_state	3	Contacts	2- or 3-digit state code
Header	Contacts	Freight Location Company Country	contact_country	2	Contacts	2-digit country code
Header	Contacts	Freight Location Company Postal Code	contact_postal_code	50	Contacts	
Header	Contacts	Freight Location Company First Name	contact_name_first	50	Contacts	
Header	Contacts	Freight Location Company Last Name	contact_name_last	50	Contacts	
Header	Contacts	Freight Location Company Title	contact_title	50	Contacts	

Header	Contacts	Freight Location Company Phone	contact_phone_num	50	Contacts	
Header	Contacts	Freight Location Company Fax	contact_fax_num	50	Contacts	
Header	Contacts	Freight Location Company Email	contact_email	50	Contacts	
Header	Contacts	Freight Location Company Account Number	contact_acct_num	50	Contacts	
Header	Header-Invoice	Proforma Invoice Date	proforma_inv_date	n/a	Invoices	MM/DD/YYYY
Header	Header-Invoice	Proforma Invoice Number	proforma_inv_num	50	Invoices	
Header	Header-Invoice	Commercial Invoice Date	comm_inv_date	n/a	Invoices	MM/DD/YYYY
Header	Header-Invoice	Commercial Invoice Number	comm_inv_num	50	Invoices	
Header	Header-Invoice	Order Number	order_num	50	Invoices	
Header	Header-Invoice	PO Number	po_num	100	Invoices	
Header	Header-Invoice	Terms	terms	50	Invoices	Any entry in the Terms Database
Header	Header-Invoice	Incoterm	incoterm	3	Invoices	3-character Incoterm
Header	Header-Invoice	Incoterm Location	inco_location	50	Invoices	
Header	Header-Invoice	Incoterm Year	incoterm_year	50	Invoices	Exact phrase from EZ Start Invoices screen
Header	Header-Invoice	Inland Freight Fees	inland_freight_fees	n/a	Invoices	decimal
Header	Header-Invoice	Handling Fees	handling_fees	n/a	Invoices	decimal
Header	Header-Invoice	Consular Fees	consular_fees	n/a	Invoices	decimal

Header	Header-Invoice	Ocean / Air Fees	ocean_air_fees	n/a	Invoices	decimal
Header	Header-Invoice	Insurance Fees	insurance_fees	n/a	Invoices	decimal
Header	Header-Invoice	Other Fees	other_fees	n/a	Invoices	decimal
Header	Header-Invoice	Country of Ultimate Destination	country_of_ultimate_destination	50	Invoices and EEI Information	
Header	Header-Invoice	Point or State of Origin	state_of_origin	50	Invoices	
Header	Header-Invoice	Exporting Carrier	exporting_carrier	50	Carriers & Ports	
Header	Header-Invoice	Exporting Carrier Code	exporting_carrier_code	10	Carriers & Ports	
Header	Header-Invoice	Vessel Name	vessel_name	50	Carriers & Ports	
Header	Header-Invoice	Inland Carrier	inland_carrier	50	Carriers & Ports	
Header	Header-Invoice	Inland Carrier Code	inland_carrier_code	10	Carriers & Ports	
Header	Header-Invoice	Port of Export	port_of_export	50	Carriers & Ports	
Header	Header-Invoice	Port of Export Code	port_of_export_code	10	Carriers & Ports	
Header	Header-Invoice	Loading Pier / Terminal	load_pier_terminal	50	Carriers & Ports	
Header	Header-Invoice	Port of Unloading	port_of_unloading	50	Carriers & Ports	
Header	Header-Invoice	Port of Unloading Code	port_of_unloading_code	10	Carriers & Ports	
Header	Header-Invoice	Shipment Reference Number	shipment_ref_num	30	EEI Information	
Header	Header-Invoice	Date of Export	date_of_export	n/a	EEI Information	MM/DD/YYYY
Header	Header-Invoice	Foreign Trade Zone	inbond_code	50	EEI Information	
Header	Header-Invoice	Inbond Type	Inbond_type	2	EEI Information	See chart at end of this table.
Header	Header-Invoice	Import Entry Number	entry_number	50	EEI Information	
Header	Header-Invoice	Filing Option	filing_option	1	EEI Information	2 or 4
Header	Header-Invoice	State of Origin	point_of_origin	2	EEI Information	2 digit state code
Header	Header-Invoice	EEI Email Response	aes_email_response	100	EEI Information	

Header	Header-Invoice	ECCN (SLI in SED Format)	eccn_consolidated	200	EEI Information	
Header	Header-Invoice	SED Export License Type	sed_paper_lic_type	50	EEI Information	
Header	Header-Invoice	Related Parties Flag	related_parties_flag	n/a	EEI Information	0 for No, 1 for Yes
Header	Header-Invoice	Containerized Shipment Flag	containerized_flag	n/a	EEI Information	0 for No, 1 for Yes
Header	Header-Invoice	Hazardous Shipment Flag	hazard_shipment_flag	n/a	EEI Information	0 for No, 1 for Yes
Header	Header-Invoice	Routed Export Flag	routed_export_flag	n/a	EEI Information	0 for No, 1 for Yes
Header	Header-Invoice	Proforma Invoice Phrase	proforma_inv_phrase	2000	Invoices-Proforma/ Commercial	
Header	Header-Invoice	Proforma Invoice Special Instructions	proforma_inv_instruct	2000	Invoices-Proforma/ Commercial	
Header	Header-Invoice	Commercial Invoice Phrase	comm_inv_phrase	2000	Invoices-Proforma/ Commercial	
Header	Header-Invoice	Commercial Invoice Special Instructions	comm_inv_instruct	2000	Invoices-Proforma/ Commercial	
Header	Header-Invoice	Currency Exchange Rate	doc_currency_rate	50	Invoices-Proforma/ Commercial	
Header	Header-Invoice	Invoice Currency	doc_currency	3	Invoices-Proforma/ Commercial	Must use valid 3-character code.
Header	Header-Invoice	Mode of Transport	Mode_of_transport	50	Carriers & Ports	See chart at end of this table.
Header	Header-Invoice	Mode of Transport Code	mode_of_transport_ code	2	Carriers & Ports	See chart at end of this table.
Header	Header-Invoice	Mode of Transport Type	mode_of_transport_ type	1	Carriers & Ports	See chart at end of this table.
Header	Header-Invoice	Shipment Number	user_reference_number	50	All	
Header	Header-Invoice	Search Tag	tags	50	Shipment Summary	
Detail	Product Info	Product ID	prod_id	50	Prod Detail: Invoices Tab	
Detail	Product Info	Product Description	prod_desc	No limit	Prod Detail: Invoices Tab	
Detail	Product Info	Quantity for Invoice	quantity	n/a	Prod Detail: Invoices Tab	decimal
Detail	Product Info	Quantity for Packing List	packing_qty	n/a	n/a	decimal

Detail	Product Info	Sales Unit of Measure	sales_unit_of_ measure	25	Prod Detail: Invoices Tab	
Detail	Product Info	Unit Price	unit_price	n/a	Prod Detail: Invoices Tab	decimal
Detail	Product Info	Extended Price	ext_price	n/a	Prod Detail: Invoices Tab	decimal
Detail	Product Info	Schedule B/HTS Code	hts_code	12	Prod Detail: Invoices Tab	Up to 10 digit code
Detail	Product Info	Net Weight	NetWeight	n/a	Prod Detail: Invoices Tab	decimal
Detail	Product Info	Country of Origin Code	country_of_origin	2	Prod Detail: Invoices Tab	2-digit country code
Detail	Product Info	Country of Origin Long Name	country_of_origin_ fullname	50	Prod Detail: Invoices Tab	Must be mapped along with code.
Detail	Product Info	Schedule B Description	schbDesc	No limit	Prod Detail: Invoices Tab	
Detail	Product Info	Quantity 1 (AES)	quantity_1	n/a	Prod Detail: Invoices Tab	integer
Detail	Product Info	Unit of Measure 1 (AES)	unit_of_measure_1	50	Prod Detail: Invoices Tab	Valid AES code
Detail	Product Info	Quantity 2 (AES)	quantity_2	n/a	Prod Detail: Invoices Tab	integer
Detail	Product Info	Unit of Measure 2 (AES)	unit_of_measure_2	50	Prod Detail: Invoices Tab	Valid AES code
Detail	Product Info	Gross Weight	sed_gross_weight	n/a	Prod Detail: Invoices Tab	decimal
Detail	Product Info	Domestic / Foreign Flag	domestic_foreign_ flag	1	Prod Detail: Invoices Tab	D for Domestic , F for Foreign
Detail	Product Info	FAS Value (AES)	sedFASVal	n/a	Prod Detail: Invoices Tab	decimal
Detail	Product Info	AES Export Code	aes_export_code	10	Prod Detail: Invoices Tab	Valid AES code
Detail	Product Info	ECCN	ECCN	50	Prod Detail: Invoices Tab	
Detail	Product Info	License Number	license_num	50	Prod Detail: Invoices Tab	
Detail	Product Info	License Value	license_value	9	Prod Detail: Invoices Tab	integer
Detail	Product Info	License Type	license_type	50	Prod Detail: Invoices Tab	Valid AES code
Detail	Product Info	Preference Criteria-Legacy field, use FTA	preference_criteria	3	Prod Detail: Invoices Tab	A, B, C, D1, D2, E,

		Origin/Preference Criteria instead				FA, FB, 1, 2 or 3
Detail	Product Info	Net Cost -Legacy field, use FTA Net Cost or Other Criteria instead	net_cost	15	Prod Detail: Invoices Tab	
Detail	Product Info	Producer Code-Legacy field, use FTA Producer instead	nafta_producer	5	Prod Detail: Invoices Tab	Yes, No1, No2 or No3
Detail	Product Info	Country of Origin-Legacy field, use FTA Country of Origin instead	nafta_c_of_o	3	Prod Detail: Invoices Tab	US, MX, CA, JNT, AU, CL, CO, KR, PA or PE
Detail	Product Info	BL Number of Packages	bl_num_of_pkgs	n/a	Prod Detail: Invoices Tab	decimal
Detail	Product Info	BL Type of Packages	PackageType	50	Prod Detail: Invoices Tab	
Detail	Product Info	BL Package Measurements	dimensions	22	Prod Detail: Invoices Tab	
Detail	Product Info	BL Marks and Numbers	bl_marks_numbers	50	Prod Detail: Invoices Tab	
Detail	Product Info	BL Hazardous Material Flag	inlandbl_hazardous_flag	n/a	Prod Detail: Invoices Tab	0 for No, 1 for Yes
Detail	Product Info	Inland BL Rate	inlandbl_rate	50	Prod Detail: Invoices Tab	decimal
Detail	Product Info	DDTC Exemption Number Code	odtc_exempt_num	25	Product Detail: Vehicle Tab	Valid AES code
Detail	Product Info	DDTC Registration Number	odtc_registr_num	50	Product Detail: Vehicle Tab	
Detail	Product Info	DDTC Quantity	odtc_quantity	10	Product Detail: Vehicle Tab	
Detail	Product Info	DDTC Equipment Indicator Flag	odtc_eqp_indicator	n/a	Product Detail: Vehicle Tab	0 for No, 1 for Yes
Detail	Product Info	DDTC Certification Indicator Flag	odtc_certi_indicator	n/a	Product Detail: Vehicle Tab	0 for No, 1 for Yes
Detail	Product Info	DDTC Category Code	odtc_catg_code	10	Product Detail: Vehicle Tab	Valid AES code
Detail	Product Info	DDTC Unit of Measure Code	odtc_uofm	10	Product Detail: Vehicle Tab	Valid AES code

Detail	Product Info	Vehicle Flag	vehicle_flag	n/a	Product Detail: Vehicle Tab	0 for No, 1 for Yes
Detail	Product Info	Vehicle ID Type Code	vehicle_id_type	1	Product Detail: Vehicle Tab	V for Vin, P for Product ID
Detail	Product Info	Vehicle ID Number	vehicle_id	50	Product Detail: Vehicle Tab	
Detail	Product Info	Vehicle Title	vehicle_title	50	Product Detail: Vehicle Tab	
Detail	Product Info	Vehicle Title State Code	vehicle_title_state	2	Product Detail: Vehicle Tab	2 digit state code
Detail	Product Info	Include on AES	include_on_sed	n/a	Product Details: Invoice Tab	0 for No 1 for Yes
Detail	Product Info	Include on Certificate of Origin	include_on_ coforigin	n/a	Product Details: Invoice Tab	0 for No 1 for Yes
Detail	Product Info	Include on USMCA/FTA Certificates	include_on_nafta	n/a	Product Details: Invoice Tab	0 for No 1 for Yes
Detail	Product Info	Include on Invoices	include_on_invoice s	n/a	Product Details: Invoice Tab	0 for No 1 for Yes
Detail	Product Info	Include on SLI/ Bills of Lading	include_on_sli_bl	n/a	Product Details: Invoice Tab	0 for No 1 for Yes
Detail	Product Info	Include on Packing List	include_on_packing _list	n/a	Product Details: Invoice Tab	0 for No 1 for Yes
Detail	Product Info	IATA UN Number	iata_un_number	4	Product Details: DG Tab	
Detail	Product Info	IATA Proper Shipping Name	iata_psn	250	Product Details: DG Tab	
Detail	Product Info	IATA Classification	iata_classification	50	Product Details: DG Tab	
Detail	Product Info	IATA Packing Group	iata_packing_group	50	Product Details: DG Tab	
Detail	Product Info	IATA Quantity	iata_quantity	n/a	Product Details: DG Tab	integer

Detail	Product Info	IATA Type of Packing	iata_qty_type_pkg	250	Product Details: DG Tab	
Detail	Product Info	IATA Technical Name	iata_technical	250	Product Details: DG Tab	
Detail	Product Info	IATA Qualifying Prefix	iata_qualifying_prefix	250	Product Details: DG Tab	
Detail	Product Info	IATA Qualifying Suffix	iata_qualifying_suffix	250	Product Details: DG Tab	
Detail	Product Info	IATA Packing Instructions	iata_pkg_instr	50	Product Details: DG Tab	
Detail	Product Info	IATA Authorization	iata_authorization	50	Product Details: DG Tab	
Detail	Product Info	IMO UN Number	imo_un_number	4	Product Details: DG Tab	
Detail	Product Info	IMO Proper Shipping Name	imo_psn	250	Product Details: DG Tab	
Detail	Product Info	IMO Classification	imo_classification	50	Product Details: DG Tab	
Detail	Product Info	IMO Packing Group	imo_packing_group	50	Product Details: DG Tab	
Detail	Product Info	IMO Quantity	imo_quantity	n/a	Product Details: DG Tab	integer
Detail	Product Info	IMO Kind of Packages	imo_qty_type_pkg	250	Product Details: DG Tab	
Detail	Product Info	IMO Technical Name	imo_technical	250	Product Details: DG Tab	
Detail	Product Info	IMO Additional Description	imo_additional_desc	4000	Product Details: DG Tab	
Detail	Product Info	IMO Gross Weight/Volume	imo_gross_wt_vol	n/a	Product Details: DG Tab	decimal
Detail	Product Info	IMO Net Weight/Volume	imo_net_wt_vol	n/a	Product Details: DG Tab	decimal
Detail	Product Info	IMO Cubic Meters	imo_cubic_m	n/a	Product Details: DG Tab	decimal

Detail	Product Info	IMO Include on IMO	Imo_dg_include	n/a	Product Details: DG Tab	0 for No 1 for Yes
Detail	Product Info	IATA Include on IATA	Iata_dg_include	n/a	Product Details: DG Tab	0 for No 1 for Yes
Detail	Product Info	FTA Preference Criteria ID	fta_pref_crit_id	2	Product Details: Invoices Tab	See FTA Code Chart.
Detail	Product Info	FTA Preference Criteria	fta_pref_crit	15	Product Details: Invoices Tab	Not needed if ID is used.
Detail	Product Info	FTA Country of Origin ID	fta_c_of_o_id	2	Product Details: Invoices Tab	See FTA Code Chart.
Detail	Product Info	FTA Country of Origin	fta_c_of_o	3	Product Details: Invoices Tab	Not needed if ID is used.
Detail	Product Info	FTA Producer ID	fta_producer_id	2	Product Details: Invoices Tab	See FTA Code Chart.
Detail	Product Info	FTA Producer	fta_producer	3	Product Details: Invoices Tab	Not needed if ID is used.
Detail	Product Info	FTA Net Cost	fta_net_cost	30	Product Details: Invoices Tab	See FTA Code Chart.
Header	Free Trade	FTA Date	nafta_date	n/a	Free Trade Agreement	MM/DD/YYYY
Header	Free Trade	Blanket From Date	nafta_blanket_from_date	n/a	Free Trade Agreement	MM/DD/YYYY
Header	Free Trade	Blanket End Date	nafta_blanket_to_date	n/a	Free Trade Agreement	MM/DD/YYYY
Header	Free Trade	CCI Other Reference	cci_otherreferences	50	Canada Customs Invoice	
Header	Free Trade	CCI Country of Transhipment	cci_countryoftrans	50	Canada Customs Invoice	
Header	Free Trade	CCI Country of Origin	cci_origin	30	Canada Customs Invoice	
Header	Free Trade	CCI Additional Transportation	cci_misc_info	150	Canada Customs Invoice	
Header	Free Trade	CCI Condition of Sale	cci_conditionofsale	150	Canada Customs Invoice	

Header	Free Trade	CCI Currency	cci_currencyof settlement	50	Canada Customs Invoice	
Header	Free Trade	CCI Box 18 Flag	cci_18	n/a	Canada Customs Invoice	0 for No, 1 for Yes
Header	Free Trade	CCI Agency Ruling	cci_departmental ruling	50	Canada Customs Invoice	
Header	Free Trade	CCI Box 22 Flag	cci_22	n/a	Canada Customs Invoice	0 for No, 1 for Yes
Header	Free Trade	CCI Box 23i Charges	cci_23i	n/a	Canada Customs Invoice	decimal
Header	Free Trade	CCI Box 23ii Charges	cci_23ii	n/a	Canada Customs Invoice	decimal
Header	Free Trade	CCI Box 23iii Charges	cci_23iii	n/a	Canada Customs Invoice	decimal
Header	Free Trade	CCI Box 24i Charges	cci_24i	n/a	Canada Customs Invoice	decimal
Header	Free Trade	CCI Box 24ii Charges	cci_24ii	n/a	Canada Customs Invoice	decimal
Header	Free Trade	CCI Box 24iii Charges	cci_24iii	n/a	Canada Customs Invoice	decimal
Header	Free Trade	CCI Box 25i Flag	cci_25i	n/a	Canada Customs Invoice	0 for No, 1 for Yes
Header	Free Trade	CCI Box 25ii Flag	cci_25ii	n/a	Canada Customs Invoice	0 for No, 1 for Yes
Header	Free Trade	Caricom Certificate Number	caricom_certificate _num	50	Caricom Invoice	
Header	Free Trade	Caricom Other References	caricom_oth_refs	50	Caricom Invoice	
Header	Free Trade	Caricom Buyer	caricom_buyer	50	Caricom Invoice	
Header	Free Trade	Caricom Presenting Bank	caricom_bank	35	Caricom Invoice	
Header	Free Trade	Caricom Country of Origin	caricom_origin	35	Caricom Invoice	
Header	Free Trade	Caricom Terms and Conditions	caricom_terms	50	Caricom Invoice	

Header	Free Trade	Caricom Currency	caricom_currency	50	Caricom Invoice	
Header	Free Trade	Caricom Gross Weight	caricom_gross_wght	35	Caricom Invoice	
Header	Free Trade	Caricom Cubic Meters	caricom_cubic_meters	10	Caricom Invoice	
Header	Free Trade	Caricom Marks and Numbers	caricom_marks_num	50	Caricom Invoice	
Header	Free Trade	Caricom Description of Goods	caricom_goods_desc	50	Caricom Invoice	
Header	Free Trade	USMCA Certify By	usmca_certify_by		Free Trade Agreements	Producer, Importer, Exporter
Header	Free Trade	Israeli Declaration By	reserved_2		Free Trade Agreements	0 for Producer 1 for Exporter
Header	OceanBL	IBL Number	ibl_number	50	Inland B/L	
Header	OceanBL	IBL Date	ibl_date	n/a	Inland B/L	MM/DD/YYYY
Header	OceanBL	IBL Carrier Number	ibl_carrier_number	50	Inland B/L	
Header	OceanBL	IBL Vehicle Number	ibl_vehicle_number	50	Inland B/L	
Header	OceanBL	IBL Carrier	ibl_carrier	50	Inland B/L	
Header	OceanBL	IBL Shipper	ibl_shipper	50	Inland B/L	
Header	OceanBL	IBL COD Amount	ibl_cod_amt	n/a	Inland B/L	decimal
Header	OceanBL	IBL Remit COD To	ibl_remit_cod_to	50	Inland B/L	
Header	OceanBL	IBL COD Paid By	ibl_cod_paid_by	50	Inland B/L	Shipper or Consignee
Header	OceanBL	IBL Quantity Received	ibl_recvd_qty	50	Inland B/L	
Header	OceanBL	IBL Unit	ibl_recvd_unit	50	Inland B/L	Options in drop-down list
Header	OceanBL	IBL Container Received	ibl_recvd_container	50	Inland B/L	
Header	OceanBL	IBL Container Unit	ibl_recvd_container_unit	50	Inland B/L	Options in drop-down list
Header	OceanBL	IBL Freight Charges Method	ibl_freight_chgs_pay_method	50	Inland B/L	Prepaid, Collect or Third Party
Header	OceanBL	IBL Value per LB	ibl_agreed_value	n/a	Inland B/L	decimal

Header	OceanBL	OBL Pre-Carriage By	obl_pre_carriage_by	30	Ocean B/L	
Header	OceanBL	OBL Pre-Carriage Place of Receipt	obl_plc_of_recpt_pre_carrier	30	Ocean B/L	
Header	OceanBL	OBL Place of Receipt on Carrier	obl_plc_of_recpt_on_carrier	30	Ocean B/L	
Header	OceanBL	OBL Booking Number	obl_booking_num	30	Ocean B/L	
Header	OceanBL	OBL Number	obl_num	30	Ocean B/L	
Header	OceanBL	OBL Export References	obl_export_refs	No limit	Ocean B/L	
Header	OceanBL	OBL Domestic Routing-Export Instructions	obl_domestic_routing	No limit	Ocean B/L	
Header	OceanBL	OBL Type of Move	obl_type_of_move	50	Ocean B/L	
Header	OceanBL	OBL Number of Original Bills	obl_doc_count	10	Ocean B/L	
Header	OceanBL	OBL Page Count	obl_page_count	5	Ocean B/L	
Header	OceanBL	OBL Signature Agent	obl_signature_party	50	Ocean B/L	
Header	OceanBL	OBL Signature Place	obl_signature_place	50	Ocean B/L	
Header	OceanBL	OBL Signature Date	obl_signature_date	n/a	Ocean B/L	MM/DD/YYYY
Header	OceanBL	AWB Shipper Account No.	awb_shipper_account	50	Air Waybill	
Header	OceanBL	AWB Agent Name	awb_agent_name	50	Air Waybill	
Header	OceanBL	AWB Agent City	awb_agent_city	50	Air Waybill	
Header	OceanBL	AWB Agent Code	awb_agent_code	50	Air Waybill	
Header	OceanBL	AWB Agent Account	awb_agent_account_no	50	Air Waybill	
Header	OceanBL	AWB Number	awb_num	30	Air Waybill	
Header	OceanBL	AWB Issuing Carrier No.	awb_carrier_num	50	Air Waybill	
Header	OceanBL	AWB Issuing Carrier Name	awb_carrier_name	50	Air Waybill	
Header	OceanBL	AWB Issuing Carrier Address	awb_carrier_address	50	Air Waybill	
Header	OceanBL	AWB Issuing Carrier City	awb_carrier_city	25	Air Waybill	
Header	OceanBL	AWB Issuing Carrier Country	awb_carrier_country	25	Air Waybill	

Header	OceanBL	AWB Issuing Carrier Postal Code	awb_carrier_ postalcode	25	Air Waybill	
Header	OceanBL	AWB Accounting Info	awb_accounting_ info	No limit	Air Waybill	
Header	OceanBL	AWB Departure Airport	awb_departure_ airport	50	Air Waybill	
Header	OceanBL	AWB Destination Airport	awb_destination_ airport	50	Air Waybill	
Header	OceanBL	AWB Flight Date 1	awb_flight_date_1	15	Air Waybill	
Header	OceanBL	AWB Flight Date 2	awb_flight_date_2	15	Air Waybill	
Header	OceanBL	AWB Declared Value Carriage	awb_declared_val_ carriage	20	Air Waybill	
Header	OceanBL	AWB Declared Value Customs	awb_declared_val_ customs	20	Air Waybill	
Header	OceanBL	AWB Insurance Amount	awb_insurance_ amount	20	Air Waybill	
Header	OceanBL	AWB SCI	awb_sci	50	Air Waybill	
Header	OceanBL	AWB Handling	awb_handling	No limit	Air Waybill	
Header	OceanBL	AWB Weight Charge Prepaid	awb_wght_chg_ prepaid	n/a	Air Waybill	decimal
Header	OceanBL	AWB Weight Charge Collect	awb_wght_chg_ collect	n/a	Air Waybill	decimal
Header	OceanBL	AWB Valuation Charge Prepaid	awb_val_chg_ prepaid	n/a	Air Waybill	decimal
Header	OceanBL	AWB Valuation Charge Collect	awb_val_chg_collec t	n/a	Air Waybill	decimal
Header	OceanBL	AWB Tax Charge Prepaid	awb_tax_prepaid	n/a	Air Waybill	decimal
Header	OceanBL	AWB Tax Charge Collect	awb_tax_collect	n/a	Air Waybill	decimal
Header	OceanBL	AWB Charges Due Agent Prepaid	awb_due_agent_ prepaid	n/a	Air Waybill	decimal
Header	OceanBL	AWB Charges Due Agent Collect	awb_due_agent_ collect	n/a	Air Waybill	decimal
Header	OceanBL	AWB Charges Due Carrier Prepaid	awb_due_carrier_ prepaid	n/a	Air Waybill	decimal
Header	OceanBL	AWB Charges Due Carrier Collect	awb_due_carrier_ collect	n/a	Air Waybill	decimal
Header	OceanBL	AWB Total Prepaid	awb_total_prepaid	n/a	Air Waybill	decimal

Header	OceanBL	AWB Total Collect	awb_total_collect	n/a	Air Waybill	decimal
Header	OceanBL	AWB Other Charges	awb_other_charges	No limit	Air Waybill	
Header	OceanBL	AWB Date Executed	awb_executed	20	Air Waybill	
Header	OceanBL	AWB Place Executed	awb_place	20	Air Waybill	
Header	OceanBL	AWB Agent Signature	awb_signature_agent	20	Air Waybill	
Header	OceanBL	IATA Airport of Departure	iata_airport_departure	50	Dangerous Goods IATA and Non-Dangerous Goods	
Header	OceanBL	IATA Destination Airport	iata_airport_destination	50	Dangerous Goods IATA and Non-Dangerous Goods	
Header	OceanBL	IATA Transport Type Code	iata_transport_type	1	Dangerous Goods IATA	P for Passenger, C for Cargo
Header	OceanBL	IATA Shipper Name-Title	shipper_name_title	50	Dangerous Goods IATA and Non-Dangerous Goods	
Header	OceanBL	IATA Shipment Place	shipper_place	50	Dangerous Goods IATA and Non-Dangerous Goods	
Header	OceanBL	IATA Shipment Date	shipper_date	50	Dangerous Goods IATA and Non-Dangerous Goods	MM/DD/YYYY
Header	OceanBL	IATA Radioactive Flag	iata_radioactive_flag	n/a	Dangerous Goods IATA	0 for No, 1 for Yes
Header	OceanBL	IATA Additional Handling	addtnl_handling	250	Dangerous Goods IATA	
Header	OceanBL	IMO Vessel-Flight-Date	imo_ship_voyagenum	50	Dangerous Goods IMO	
Header	OceanBL	IMO Port of Handling	imo_port_of_handling	50	Dangerous Goods IMO	
Header	OceanBL	IMO Container ID Number	imo_container_id	50	Dangerous Goods IMO	
Header	OceanBL	IMO Seal Number	imo_seal_num	50	Dangerous Goods IMO	

Header	OceanBL	IMO Container Type-Size	imo_container_size	50	Dangerous Goods IMO	
Header	OceanBL	IMO Tare Mass (kg)	imo_tare	50	Dangerous Goods IMO	
Header	OceanBL	IMO Gross Mass (kg)	imo_total_gross_ mass	50	Dangerous Goods IMO	
Header	OceanBL	IMO Transportation Reference No.	imo_reference_nu m	30	Dangerous Goods IMO	
Header	OceanBL	IMO Shipper Reference Number	imo_shipper_ref_ num	50	Dangerous Goods IMO	
Header	OceanBL	IMO Forwarder Reference Number	imo_fwrdr_ref_nu m	50	Dangerous Goods IMO	
Header	OceanBL	IMO Carrier	imo_carrier_name	50	Dangerous Goods IMO	
Header	OceanBL	IMO Packing Company	imo_packer_ company	50	Dangerous Goods IMO	
Header	OceanBL	IMO Packing Name-Status	imo_packer_name_ status	50	Dangerous Goods IMO	
Header	OceanBL	IMO Packing Place-Date	imo_packer_date	50	Dangerous Goods IMO	
Header	OceanBL	IMO Hauler Name	imo_hauler_name	50	Dangerous Goods IMO	
Header	OceanBL	IMO Vehicle Reg Number	imo_hauler_vehicle _no	50	Dangerous Goods IMO	
Header	OceanBL	IMO Hauler Driver-Date	imo_hauler_name_ date	50	Dangerous Goods IMO	
Header	OceanBL	IMO Preparer Company	imo_preparing_ company	50	Dangerous Goods IMO	
Header	OceanBL	IMO Preparer Name-Status	imo_preparing_na me_status	50	Dangerous Goods IMO	
Header	OceanBL	IMO Preparer Place-Date	imo_preparing_plac e_date	50	Dangerous Goods IMO	
Header	OceanBL	Non-Dangerous Goods Description	articles_not_ restricted	No limit	Non-Dangero us Goods	
Header	OceanBL	IATA 24-Hour Phone Number	24hr_phone	2000	Dangerous Goods IATA	
Header	SLI	Inland Freight Fees Quote	sli_if_q	n/a	Shipper's Letter of Instruction	decimal
Header	SLI	OceanAir Fees Quote	sli_oa_q	n/a	Shipper's Letter of Instruction	decimal
Header	SLI	Handling Fees Quote	sli_hf_q	n/a	Shipper's Letter of Instruction	decimal

Header	SLI	Insurance Fees Quote	sli_ic_q	n/a	Shipper's Letter of Instruction	decimal
Header	SLI	Consular Fees Quote	sli_cf_q	n/a	Shipper's Letter of Instruction	decimal
Header	SLI	Additional Charges Quote	sli_ac_q	n/a	Shipper's Letter of Instruction	decimal
Header	SLI	Inland Freight Fees Adjustment	sli_if_a	n/a	Shipper's Letter of Instruction	decimal
Header	SLI	OceanAir Fees Adjustment	sli_oa_a	n/a	Shipper's Letter of Instruction	decimal
Header	SLI	Handling Fees Adjustment	sli_hf_a	n/a	Shipper's Letter of Instruction	decimal
Header	SLI	Insurance Fees Adjustment	sli_ic_a	n/a	Shipper's Letter of Instruction	decimal
Header	SLI	Consular Fees Adjustment	sli_cf_a	n/a	Shipper's Letter of Instruction	decimal
Header	SLI	Additional Charges Adjustment	sli_ac_a	n/a	Shipper's Letter of Instruction	decimal
Header	SLI	Adjust Inland Freight Flag	sli_if_yn	n/a	Shipper's Letter of Instruction	0 for No, 1 for Yes
Header	SLI	Adjust OceanAir Flag	sli_oa_yn	n/a	Shipper's Letter of Instruction	0 for No, 1 for Yes
Header	SLI	Adjust Handling Flag	sli_hf_yn	n/a	Shipper's Letter of Instruction	0 for No, 1 for Yes
Header	SLI	Adjust Insurance Flag	sli_ic_yn	n/a	Shipper's Letter of Instruction	0 for No, 1 for Yes
Header	SLI	Adjust Counsular Flag	sli_cf_yn	n/a	Shipper's Letter of Instruction	0 for No, 1 for Yes
Header	SLI	Adjust Additional Flag	sli_ac_yn	n/a	Shipper's Letter of Instruction	0 for No, 1 for Yes
Header	SLI	Quote on These Charges Flag	sli_quote	n/a	Shipper's Letter of Instruction	0 for No, 1 for Yes
Header	SLI	Adjust Invoice with Charges Flag	sli_adjust	n/a	Shipper's Letter of Instruction	0 for No, 1 for Yes

Header	SLI	Respond with Costs By Code	sli_respond_with_ costs	50	Shipper's Letter of Instruction	Phone, Fax or Email
Header	SLI	How to Bill Freight Code	sli_freight_prepaid	50	Shipper's Letter of Instruction	Collect or Prepaid
Header	SLI	Shipping Details Code	sli_shipping_cons_ direct	50	Shipper's Letter of Instruction	Consolida te or Direct
Header	SLI	Insurance Required Flag	sli_insurance_ required	n/a	Shipper's Letter of Instruction	0 for No, 1 for Yes
Header	SLI	Type of Insurance	sli_insurance_type	No limit	Shipper's Letter of Instruction	
Header	SLI	License Number-Symbo l	sli_lic_num_symbol	25	Shipper's Letter of Instruction	
Header	SLI	Forward Documents To	sli_fwd_docs_to	40	Shipper's Letter of Instruction	
Header	SLI	Invoice Attached Flag	sli_doc_inv	n/a	Shipper's Letter of Instruction	0 for No, 1 for Yes
Header	SLI	NAFTA Attached Flag	sli_doc_nf	n/a	Shipper's Letter of Instruction	0 for No, 1 for Yes
Header	SLI	Inland Bill of Lading Attached Flag	sli_doc_ov	n/a	Shipper's Letter of Instruction	0 for No, 1 for Yes
Header	SLI	Packing List Attached Flag	sli_doc_pl	n/a	Shipper's Letter of Instruction	0 for No, 1 for Yes
Header	SLI	Certificate of Origin Attached Flag	sli_doc_co	n/a	Shipper's Letter of Instruction	0 for No, 1 for Yes
Header	SLI	Bank Draft Attached Flag	sli_doc_dr	n/a	Shipper's Letter of Instruction	0 for No, 1 for Yes
Header	SLI	Attachment Flag	sli_doc_att	n/a	Shipper's Letter of Instruction	0 for No, 1 for Yes
Header	SLI	Other Attached Flag	sli_doc_Othr	n/a	Shipper’s Letter of Instruction	0 for No, 1 for Yes
Header	SLI	Cert of Origin Dated At	Sli_user_8	n/a	Shipper’s Letter of Instruction	
Header	SLI	Cert of Origin – Day	sli_user_3	n/a	Shipper’s Letter of Instruction	

Header	SLI	Cert of Origin – Month	sli_user_9	n/a	Shipper's Letter of Instruction	
Header	SLI	Cert of Origin – Year	sli_user_10	n/a	Shipper's Letter of Instruction	
Header	SLI	SLI Special Instructions	sli_spcl_instruct	n/a	Shipper's Letter of Instruction	
Header	SLI	Cert of Origin Special Instructions	sli_user_7	n/a	Shipper's Letter of Instruction	

Inbond Type Codes for AESDirect

Codes	Inbond Type
36	Warehouse withdrawal for IE
37	Warehouse withdrawal for T&E
67	Foreign Trade Zone withdrawal for IE
68	Foreign Trade Zone withdrawal for T&E
70	Not Sold Inbond

Acceptable Content for the Mode of Transport Fields

Mode of Transport	Mode of Transport Code	Mode of Transport Type
Air	40	A
Air, Containerized	41	A
Vessel	10	S
Vessel, Containerized	11	S
Barge	12	S
Rail	20	S
Rail, Containerized	21	S
Truck	30	S
Truck, Containerized	31	S
Auto	32	O
Pedestrian	33	O
Road, Other	34	O
Mail	50	O
Passenger, Hand Carried	60	O
Fixed Transport (Pipeline and Powerhouse)	70	O

In order for **Mode of Transport** data to be successfully imported into Shipping Solutions Professional, you need to map all three of these data fields.

Code	Contact Type
BB	Inland Bill of Lading Bill To
BC	Inland Bill of Lading Consignee
BK	Bank (for restricted party screenings only)
BT	Bill To
CB	Not used
CE	Canada Customs Invoice Exporter
CO	Canada Customs Invoice Originator
CP	Canada Customs Invoice Purchaser
EU	End User (for restricted party screenings only)
EX	Exporter
FA	Forwarding Agent
FF	Freight Forwarder
FL	Freight Location Company
IC	Intermediate Consignee
MA	Manufacturer (for restricted party screenings only)
NC	FTA Certifier
NI	FTA Importer
NP	FTA Producer
NT	Notify Party
OC	Ocean Bill of Lading Also Notify
UC	Ultimate Consignee

When running the DXM using an XML file, you will need to identify each contact type using these codes. The **EX** contact type is required but can be blank.

FTA Code Charts

Free Trade Agreement	Preference/Origin Criteria	Preference/Origin Criteria Definition	Preference/Origin Criteria ID (for DXM only)
U.S.-Australia	Criterion 1	Criterion 1 (28(b)(i)): The good is wholly obtained or produced entirely in Australia or the United States.	1
U.S.-Australia	Criterion 2	Criterion 2 (28(b)(ii)(A)(B)&(C)): Non-originating material(s) undergo(es) prescribed tariff shift &/or satisfies RVC requirements.	2
U.S.-Australia	Criterion 3	Criterion 3 (28(b)(iii)): The good is produced entirely in Australia or the U.S. from materials described in Criterion 1 or 2.	3
U.S.-Australia	Criterion 4	Criterion 4 (28(b)(iv)): Good qualifies otherwise.	4
CAFTA-DR-U.S.	Criterion A	Criterion A (29(b)(i)/Art. 4.1(a)): The good is wholly obtained or produced entirely in a CAFTA-DR country.	5
CAFTA-DR-U.S.	Criterion B1	Criterion B1 (29(b)(ii)(A)/Art. 4.1(b)(ii)): Non-originating material(s) undergo(es) prescribed tariff shift.	6
CAFTA-DR-U.S.	Criterion B2	Criterion B2 (29(b)(ii)(B)/Art. 4.1(b)(ii)): Non-originating material(s) satisfies RVC requirements.	7
CAFTA-DR-U.S.	Criterion C	Criterion C (29(b)(iii)/Art. 4.1(c): The good is produced entirely in a CAFTA-DR country from materials described in Criterion A or B.	8
U.S.-Chile	Criterion 1	Criterion 1 (26(b)(i)/Art. 4.1(a)): The good is wholly obtained or produced entirely in Chile or the United States.	9
U.S.-Chile	Criterion 2	Criterion 2 (26(b)(ii)(A)&(B)/Art. 4.1(b)(i)&(ii)): Non-originating material(s) undergo(es) prescribed tariff shift &/or satisfies RVC requirements.	10
U.S.-Chile	Criterion 3	Criterion 3 (26(b)(iii)/Art. 4.1(c): The good is produced entirely in Chile or the U.S. from materials described in Criterion 1 or 2.	11
U.S.-Colombia	A	Criterion A (34(b)(i)/Art. 4.1(a)): The good is wholly obtained or produced entirely in Colombia or the United States.	12
U.S.-Colombia	B1	Criterion B1 (34(b)(ii)(A)/Art. 4.1(b)(i)): Non-originating material(s) undergo(es) prescribed tariff shift.	13
U.S.-Colombia	B2	Criterion B2 (34(b)(ii)(B)/Art. 4.1(b)(ii)): Non-originating material(s) satisfies regional value-content requirements.	14
U.S.-Colombia	C	Criterion C (34(b)(iii)/Art. 4.1(c): The good is produced entirely in Colombia or the U.S. from materials described in Criterion A or B.	15
U.S.-Japan	Criterion 1	Criterion 1 (Annex I(C)(2)(a)(i)): The good is wholly obtained or produced entirely in Japan or the U.S.	16
U.S.-Japan	Criterion 2	Criterion 2 (Annex I(C)(2)(a)(ii)): Good is produced entirely in Japan or the U.S. from materials described in Criterion 1 or 3.	17
U.S.-Japan	Criterion 3	Criterion 3 (Annex I(C)(2)(a)(iii)): Non-originating material(s) undergo(es) prescribed tariff shift and/or satisfies RVC requirements.	18
U.S.-Korea	Criterion 1	Criterion 1 (33(b)(i)/Art. 6.1(a)): The good is wholly obtained or produced entirely in Korea or the United States.	19
U.S.-Korea	Criterion 2	Criterion 2 (33(b)(ii)(A)&(B)/Art. 6.1(b)(i)&(ii)): Non-originating material(s) undergo(es) prescribed tariff shift &/or satisfies RVC requirements.	20
U.S.-Korea	Criterion 3	Criterion 3 (33(b)(iii)/Art. 6.1(c): The good is produced entirely in Korea or the U.S. from materials described in Criterion 1 or 2.	21
U.S.-Panama	Criterion 1	Criterion 1 (35(b)(i)/Art. 4.1(a)): The good is wholly obtained or produced entirely in Panama or the United States.	22

Free Trade Agreement	Preference/Origin Criteria	Preference/Origin Criteria Definition	Preference/Origin Criteria ID (for DXM only)
U.S.-Panama	Criterion 2	Criterion 2 (35(b)(ii)(A)&(B)/Art. 4.1(b)(i)&(ii)): Non-originating material(s) undergo(es) prescribed tariff shift &/or satisfies RVC requirements.	23
U.S.-Panama	Criterion 3	Criterion 3 (35(b)(iii)/Art. 4.1(c): The good is produced entirely in Panama or the U.S. from materials described in Criterion 1 or 2.	24
U.S.-Peru	4.1(a)	Criterion A (32(b)(i)/Art. 4.1(a)): The good is wholly obtained or produced entirely in Peru or the United States.	25
U.S.-Peru	4.1(b)1	Criterion B1 (32(b)(ii)(A)/Art. 4.1(b)(i)): Non-originating material(s) undergo(es) prescribed tariff shift.	26
U.S.-Peru	4.1(b)2	Criterion B2 (32(b)(ii)(B)/Art. 4.1(b)(ii)): Non-originating material(s) satisfies regional value-content requirements.	27
U.S.-Peru	4.1(c)	Criterion C (32(b)(iii)/Art. 4.1(c): The good is produced entirely in Peru or the U.S. from materials described in Criterion 1 or 2.	28
U.S.-Singapore	Criterion 1	Criterion 1 (25(b)(i)/Art. 3.1(a)): The good is wholly obtained or produced entirely in Singapore or the United States.	29
U.S.-Singapore	Criterion 2	Criterion 2 (25(b)(ii)(A)&(B)/Art. 3.1(b)(i)&(ii)): Non-originating material(s) undergo(es) prescribed tariff shift &/or satisfies RVC requirements.	30
U.S.-Singapore	Criterion 3	Criterion 3 (25(b)(iii)/Art. 3.1(c): The good is produced entirely in Singapore or the U.S. from materials described in Criterion 1 or 2.	31
USMCA	Criterion 1	Criterion 1 (Art. 4.2(a)): The good is wholly obtained or produced entirely in Canada, Mexico, or the US.	32
USMCA	Criterion 2	Criterion 2 (Art. 4.2(b)): Non-originating material(s) undergo(es) prescribed tariff shift and/or satisfies RVC requirements.	33
USMCA	Criterion 3	Criterion 3 (Art. 4.2(c)): Good is produced entirely in Canada, Mexico, or the US from materials described in Criterion 1 or 2.	34
USMCA	Criterion 4	Criterion 4 (Art. 4.2(d)): Excluding HTSUS Chs. 61-63, good is produced entirely in Canada, Mexico, or the US, classified with its materials or satisfies the "unassembled goods" requirement, and satisfies an RVC requirement.	35
USMCA	Criterion 5	Criterion 5 (Art. 2.10(2)): Product of Schedule II of the USMCA Rules of Origin Uniform regulation (19 CFR 182).	36

Free Trade Agreement	Other Criteria/Net Cost	Producer	Country of Origin	Other Criteria/Net Cost (for DXM only)	Producer ID (for DXM only)	Country of Origin ID (for DXM only)
U.S.-Australia	N/A	N/A	U.S. or Australia	N/A	N/A	Use 1 for U.S. and 2 for Australia.
CAFTA-DR-U.S.	If the Origin Criteria is B2, state which of the following methods was used to determine the origin: RVC: Regional Value Content, followed by (1) Build-down method, (2) Build-up method, or (3) Net Cost; ACU: Accumulation; DM: De Minimis; FGM: Fungible Goods and Materials; and SG: Sets of Goods. For all other Criteria, leave this field blank.	Options include Yes, No1 or No2. Yes indicates you are the producer. No1 means you have certification goods qualify from the exporter or producer, and No2 means you have knowledge that the goods qualify. You may be asked to verify that knowledge.	N/A	Up to 30 characters.	Use 1 for Yes, 3 for No1 and 4 for No2.	N/A
U.S.-Chile	N/A	Options include Yes or No. Yes indicates you are the producer. No indicates you are not the producer.	U.S. or Chile	N/A	Use 1 for Yes, 2 for No.	Use 1 for U.S. and 3 for Chile.
U.S.-Colombia	If the Origin Criteria is B2, state the Regional Value Content percent, followed by RV for build-down method, AV for build-up method, or CN for Net Cost. If no RVC, state NO.	N/A	U.S. or Colombia	Up to 30 characters.	N/A	Use 1 for U.S. and 4 for Colombia.
U.S.-Japan	N/A	N/A	U.S. or Japan	N/A	N/A	Use 1 for U.S. and 5 for Japan.
U.S.-Korea	N/A	N/A	U.S. or Korea	N/A	N/A	Use 1 for U.S. and 6 for Korea.
U.S.-Panama	State RVC for Regional Value Content followed by "1" for build-down method, "2" for build-up method, or "3" for Net Cost. If no RVC, state No.	N/A	U.S. or Panama	Up to 30 characters.	N/A	Use 1 for U.S. and 7 for Panama.
U.S.-Peru	State RVC for Regional Value Content followed by "1" for roll-down method, "2" for roll-up method, or "3" for Net Cost. If no RVC, state No.	N/A	U.S. or Peru	Up to 30 characters.	N/A	Use 1 for U.S. and 8 for Peru.
U.S.-Singapore	N/A	N/A	U.S. or Singapore	N/A	N/A	Use 1 for U.S. and 9 for Singapore.
USMCA	N/A	N/A	U.S., Canada or Mexico	N/A	N/A	Use 1 for U.S., 10 for Canada and 11 for Mexico.

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