



# SHIPPING SOLUTIONS<sup>®</sup>

export documentation software

## INSTALLATION INSTRUCTIONS



export documentation software



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## Shipping Solutions Professional



## About Shipping Solutions®

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

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

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

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

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

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

# Software Overview

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

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

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

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

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

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

## Installation

Shipping Solutions installation is performed by running the provided installation file. The process installs Shipping Solutions along with the required components on the computer. It also adds a desktop icon and program shortcut to run the application after the installation.

## System Requirements

### Recommended Minimum Hardware

**Processor:** 1 GHz

**RAM:** 1 GB

**Disk Space:** 3 GB

### Supported Operating Systems

Windows 7 or higher.

### Internet Security Options

Depending on your internet security settings, you may need to whitelist these URLs if you want to use the corresponding services:

<http://www.shipsolutions.com> – News flashes

<https://wizards.amberroad.com> – Export Compliance Module (Professional version only)

<https://ace.cbp.dhs.gov> – ACE/AESDirect

<http://www.fedex.com> – FedEx (Professional version only)

<http://www.apps.ups.com> – UPS (Professional version only)

<https://ssam.shippingsolutions.com> – Export Compliance Module and software registration

<https://www.tradecertl.net> – Electronic Certificate of Origin

## Cloud Hosting Options

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.

## 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**.

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

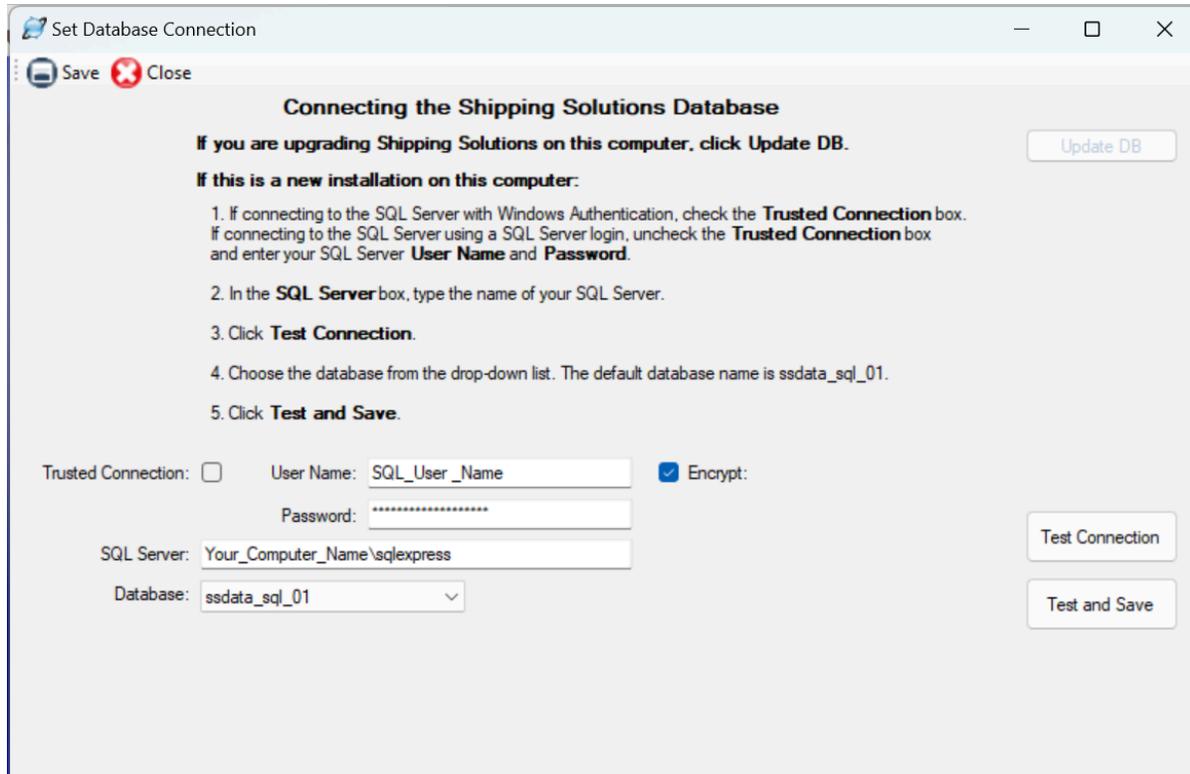
Click the Server link provided, which downloads a file called **SS\_Server\_Install.exe**. Double click on the downloaded file to install.

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.

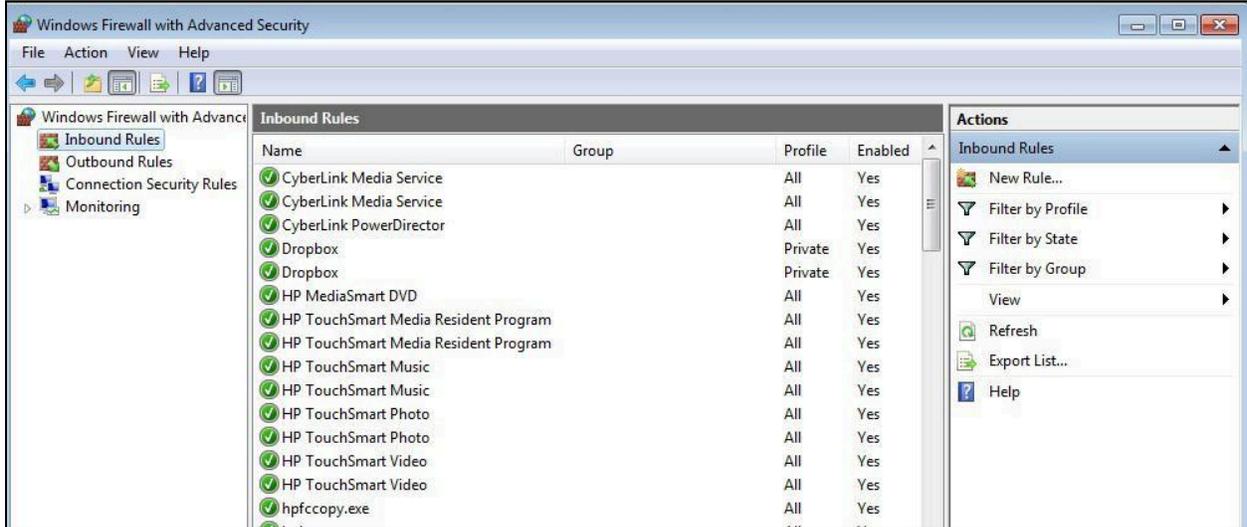
### Opening Ports

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

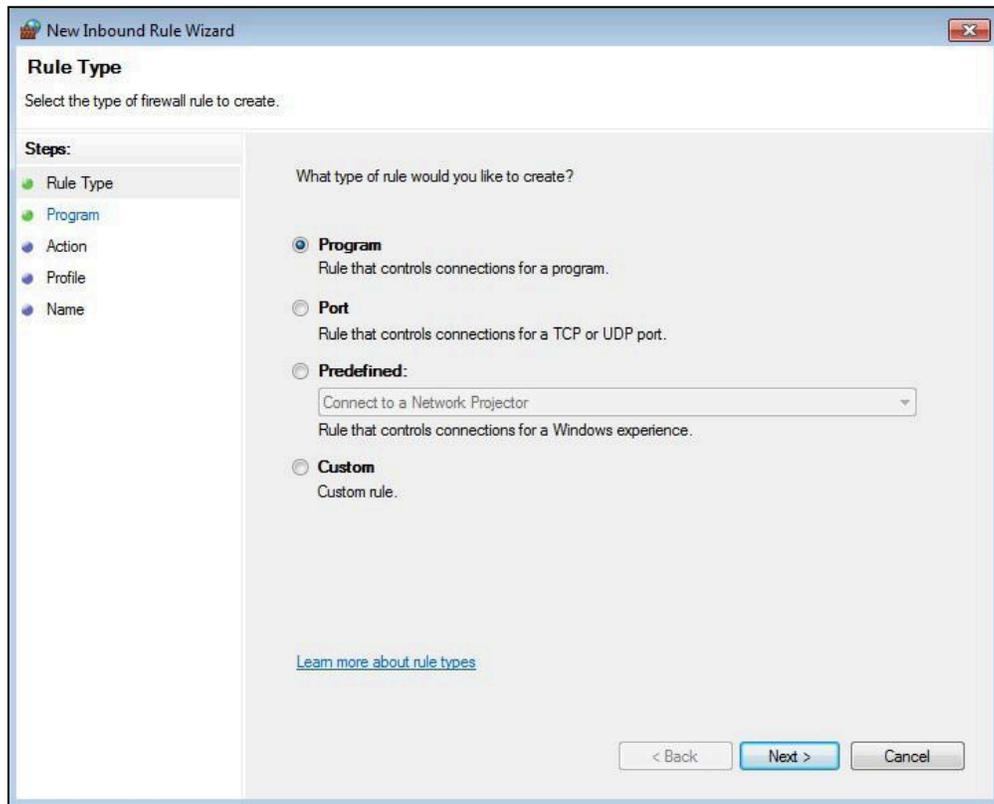
Begin by setting the inbound and outbound rules for the SQL Server. Navigate to the Start->Control Panel ->Administrative Tools. Double click on **Windows Firewall with Advanced Security**. The window is shown below.

## Windows Firewall with Advanced Security Window



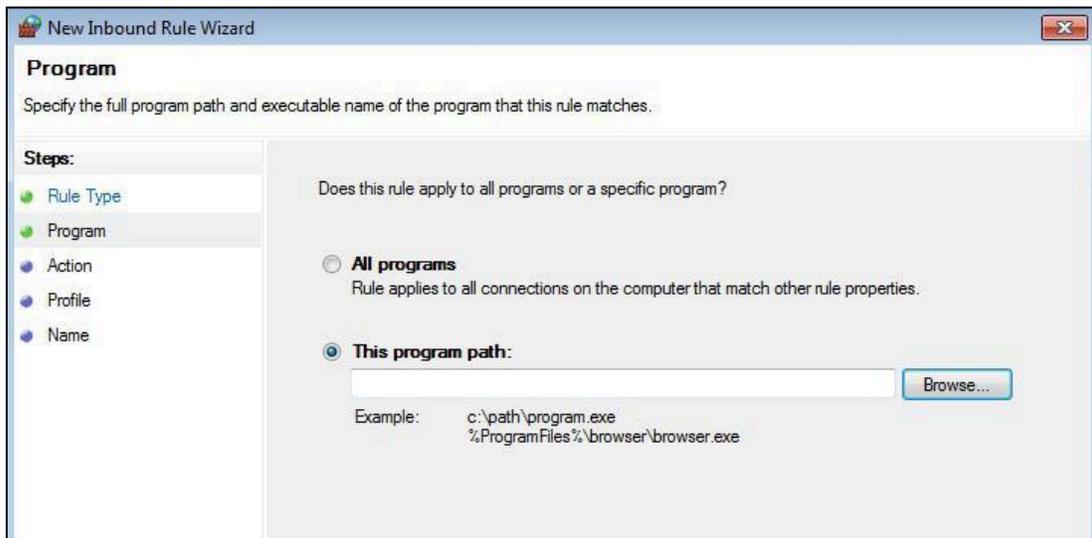
Begin by selecting **Inbound Rules** from the left column and clicking on **New Rule** from the right column. This will open a New Inbound Rule Wizard window.

## New Inbound Rule Wizard Window 1



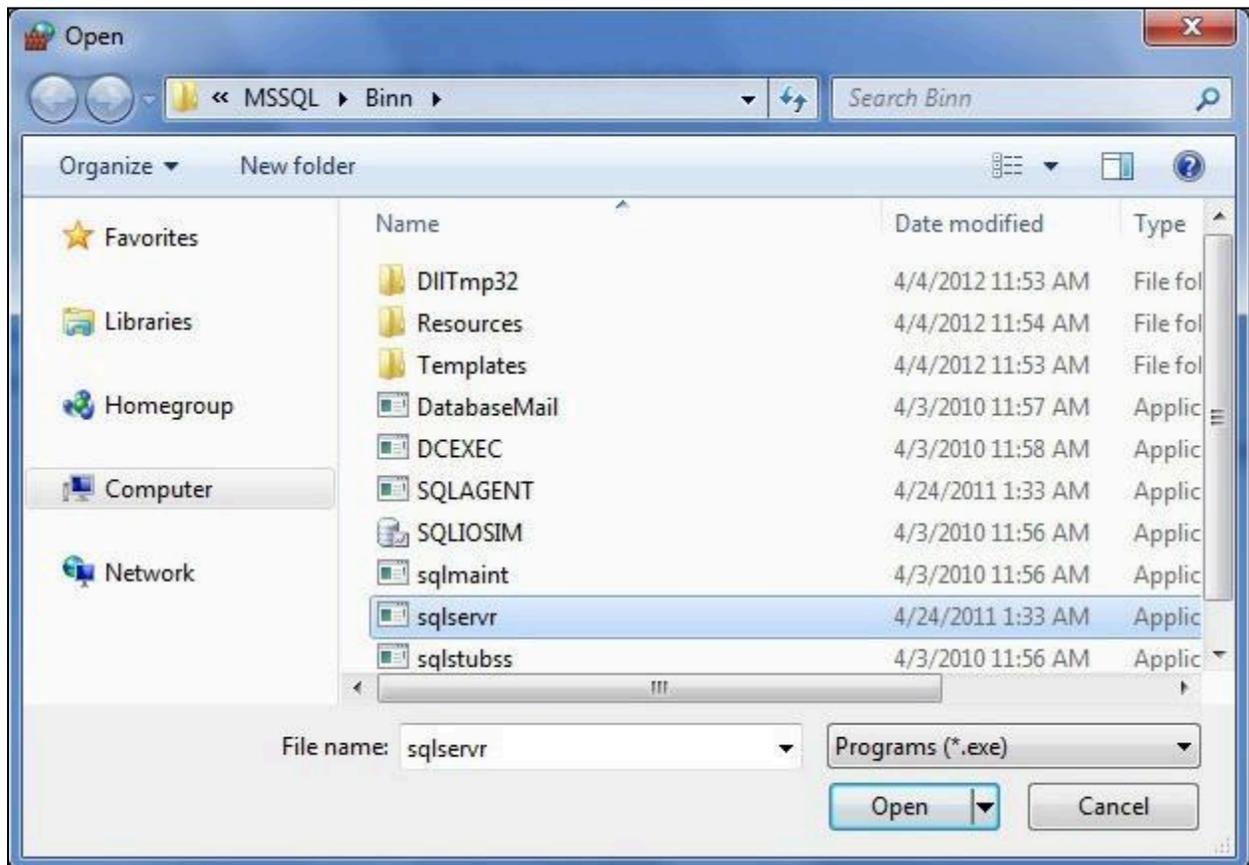
Select **Program** and then click **Next**. This will open the next window in the Wizard.

## 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

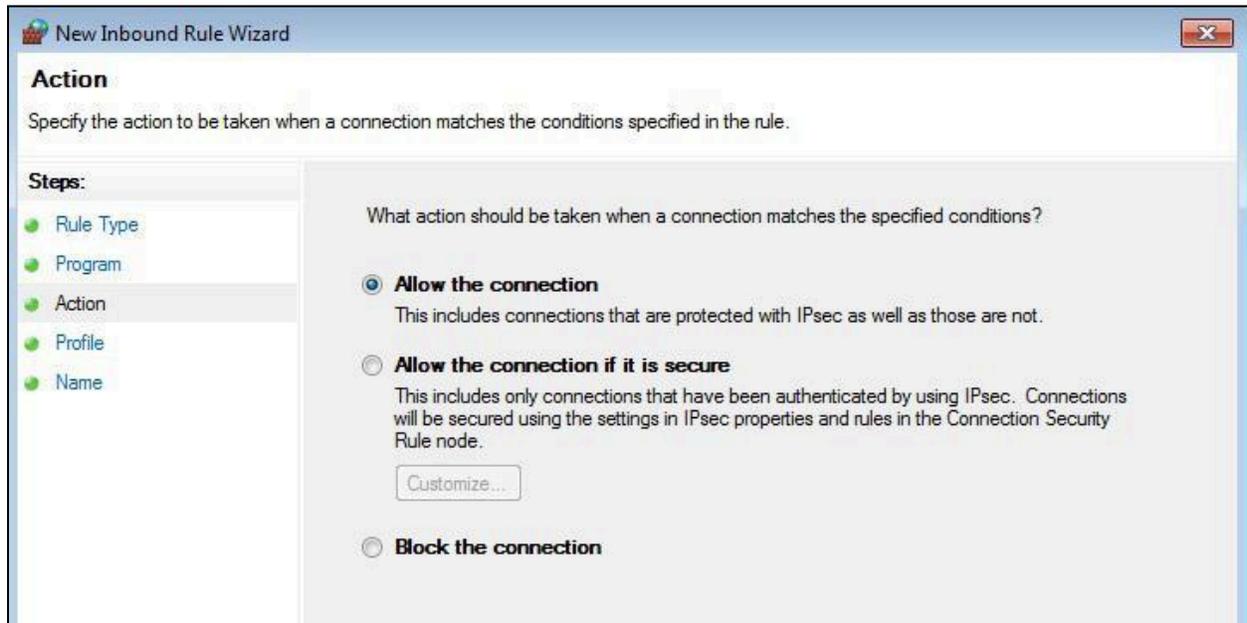


In the **Open** window, navigate to the following:

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\.)

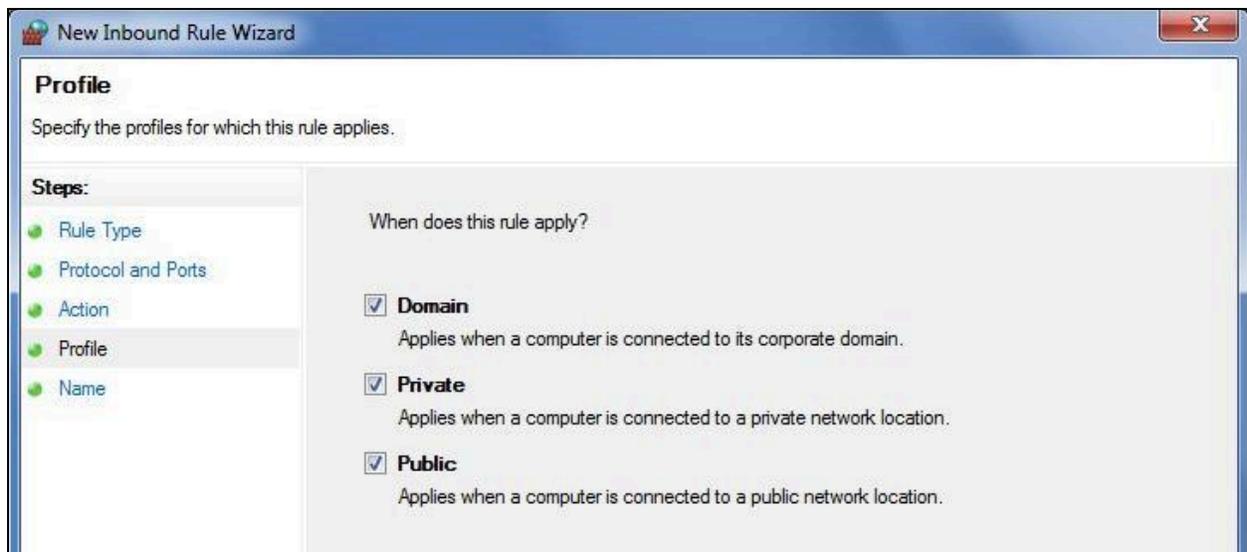
Click on **sqlservr** (or **sqlsevr.exe**) and click **Open**. The navigation window will close, and you will return to the **New Inbound Rule Wizard Window 2** pictured above. Click on **Next**.

## New Inbound Rule Wizard Window 4



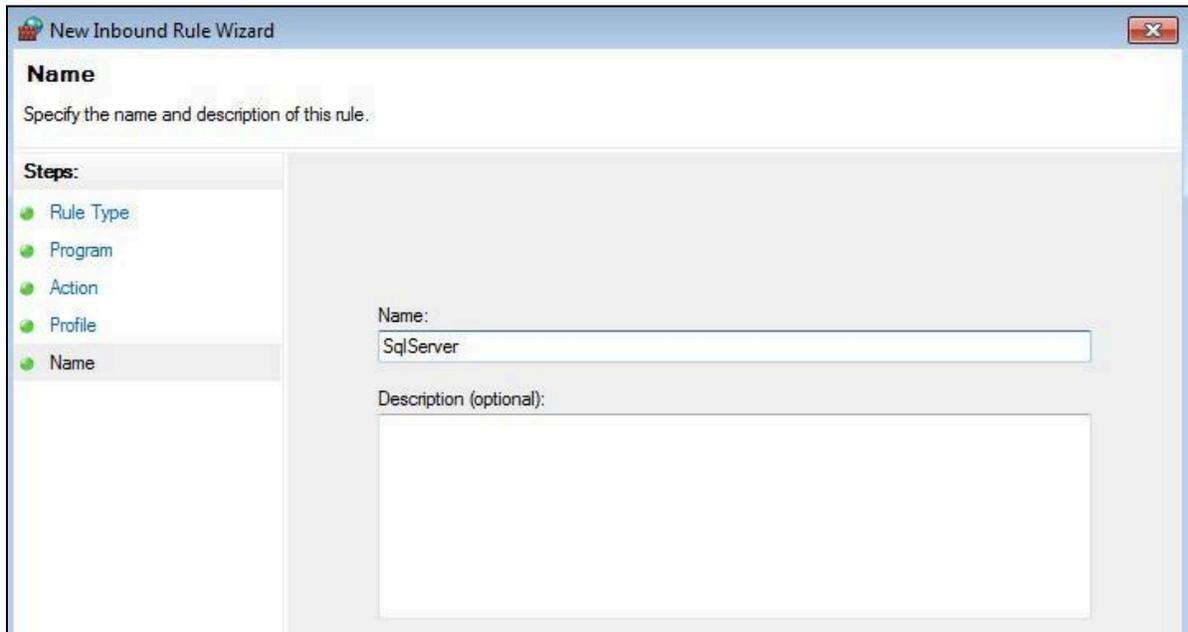
Make sure **Allow the connection** is selected and click **Next**.

## New Inbound Rule Wizard Window 5



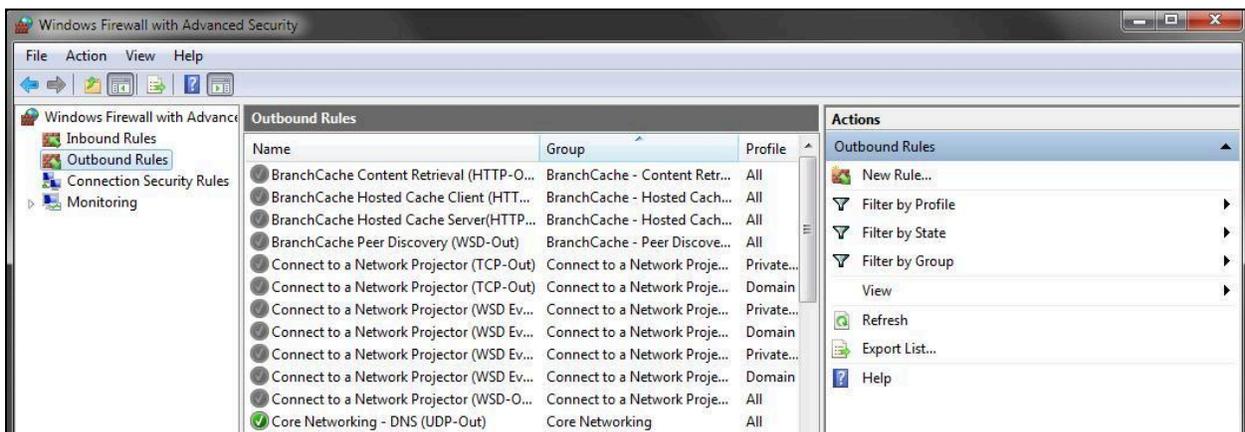
Leave all the boxes checked and click **Next**.

## 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

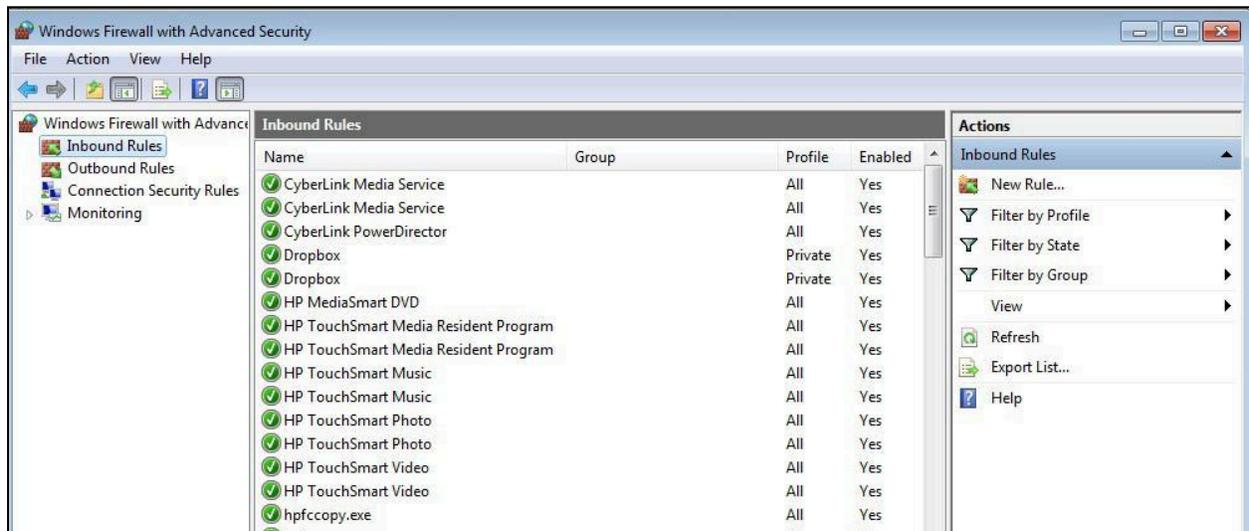


Now that you've created the inbound rule for the SQL Server, you need to create the outbound rule. From the **Windows Firewall with Advanced Security** window, click **Outbound Rules** from the left and **New Rule** from the right and repeat the steps you followed when creating the inbound rules:

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



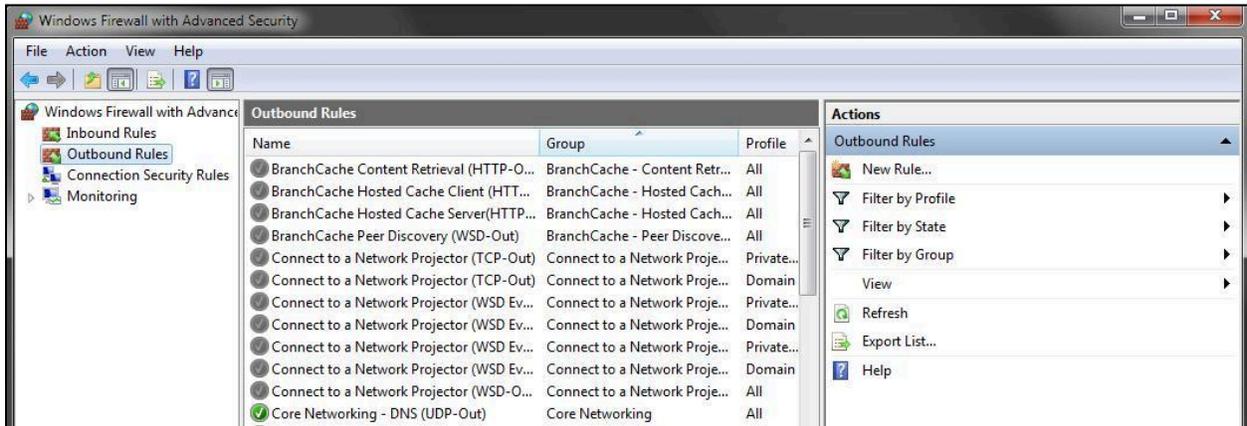
Next, create inbound and outbound rules for the SQL Browser.

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.

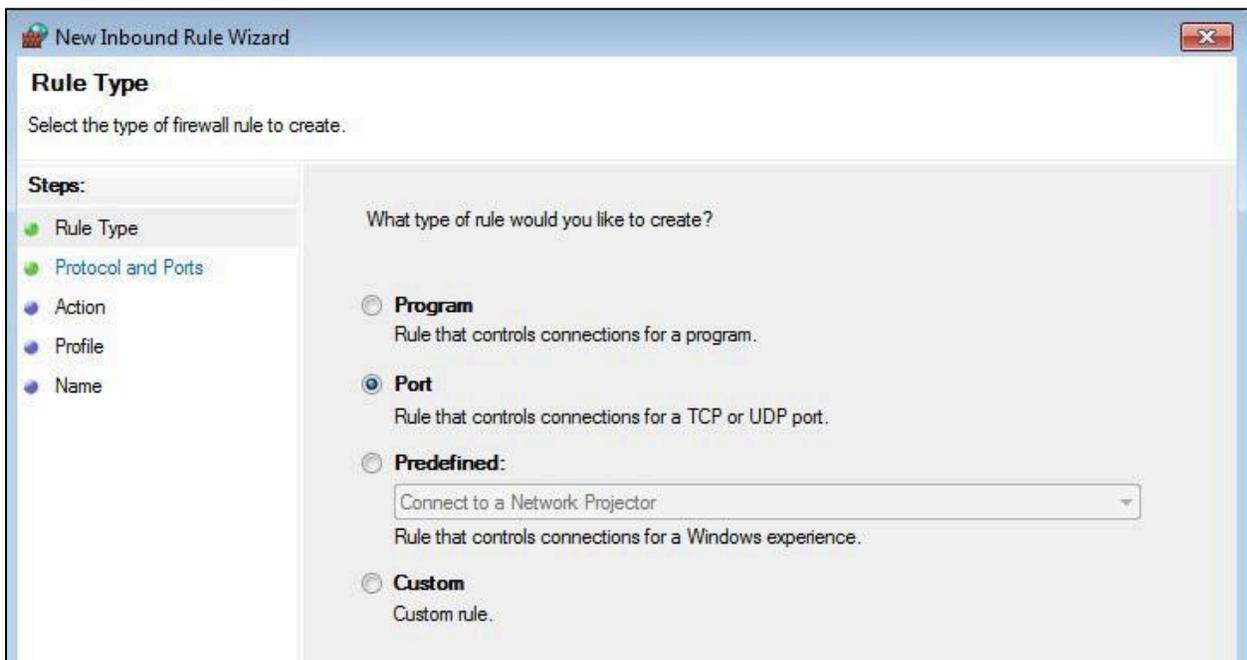
## Creating Inbound and Outbound Rules for Port 1433



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

The screenshot shows the 'New Inbound Rule Wizard' window at the 'Protocol and Ports' step. The title bar reads 'New Inbound Rule Wizard'. The main heading is 'Protocol and Ports' with the instruction 'Specify the protocols and ports to which this rule applies.' On the left, a 'Steps:' list includes 'Rule Type', 'Protocol and Ports' (highlighted), 'Action', 'Profile', and 'Name'. The main area contains two questions: 'Does this rule apply to TCP or UDP?' with radio buttons for 'TCP' (selected) and 'UDP'; and 'Does this rule apply to all local ports or specific local ports?' with radio buttons for 'All local ports' and 'Specific local ports:' (selected). Below the 'Specific local ports:' radio button is a text input field containing '1433' and an example text 'Example: 80, 443, 5000-5010'.

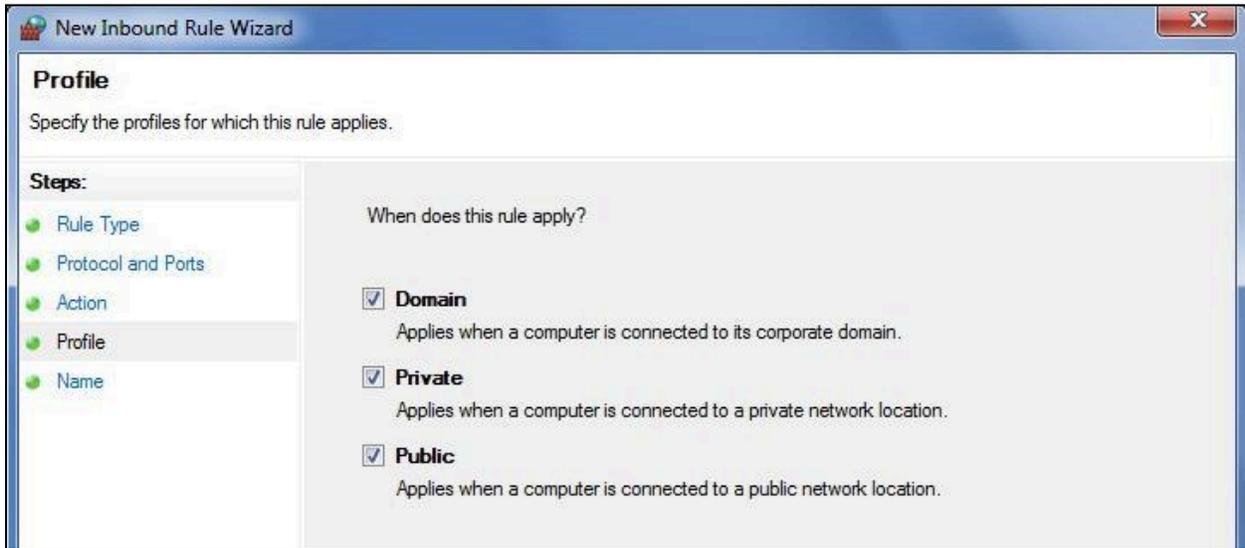
Choose **TCP**. Enter **1433** in the **Specific local ports** field and then click **Next**. This will open the **Action** window.

## New Inbound Port Wizard Window 3

The screenshot shows the 'New Inbound Rule Wizard' window at the 'Action' step. The title bar reads 'New Inbound Rule Wizard'. The main heading is 'Action' with the instruction 'Specify the action to be taken when a connection matches the conditions specified in the rule.' On the left, a 'Steps:' list includes 'Rule Type', 'Program', 'Action' (highlighted), 'Profile', and 'Name'. The main area contains the question 'What action should be taken when a connection matches the specified conditions?' with three radio button options: 'Allow the connection' (selected), 'Allow the connection if it is secure', and 'Block the connection'. The 'Allow the connection if it is secure' option has a descriptive paragraph below it. A 'Customize...' button is located below the 'Allow the connection if it is secure' option.

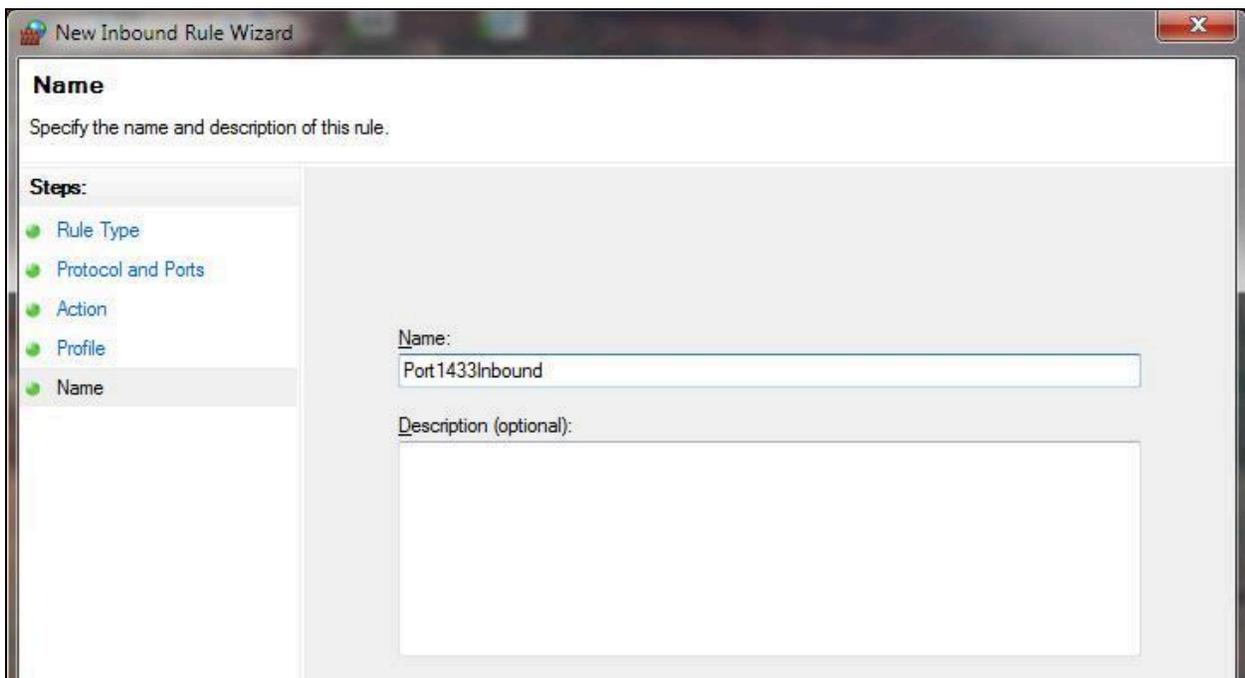
Make sure the **Allow the connection** option is chosen and then click **Next**.

## New Inbound Port Wizard Window 4



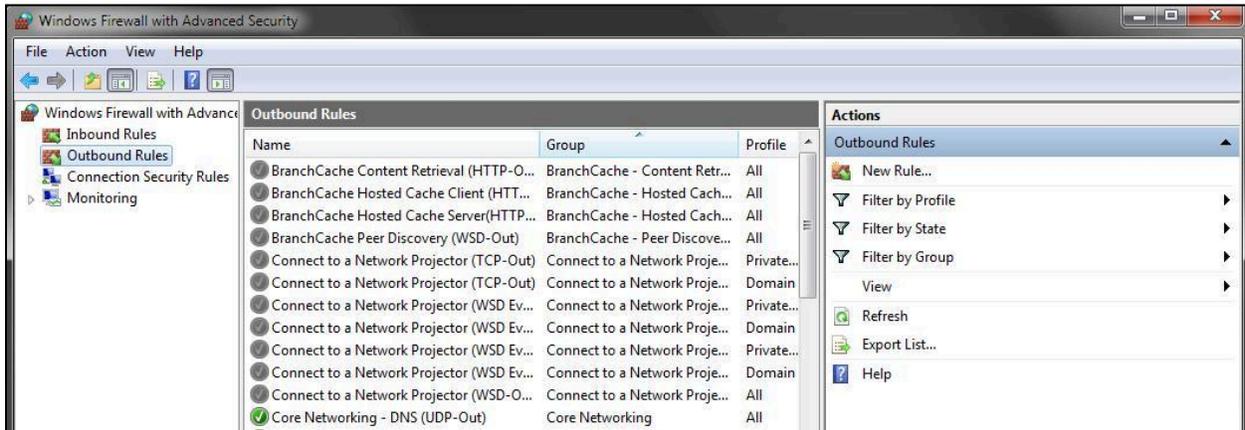
Leave all the boxes checked and click **Next**.

## 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**.



## 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.

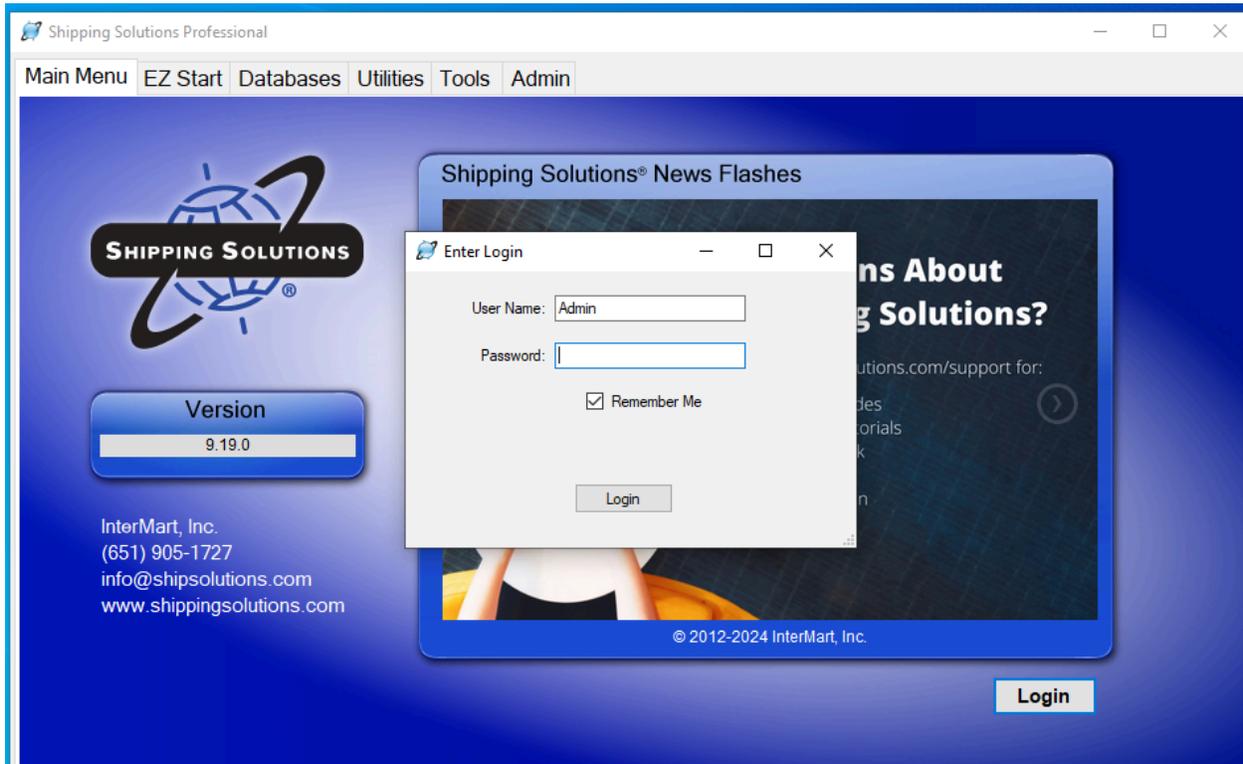
The first time you click on one of these tabs, you will be asked to register the Shipping Solutions software. Enter the registration code provided as well as your contact information. If you don't know your code, send an email to [help@shipsolutions.com](mailto:help@shipsolutions.com). You have 30 days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

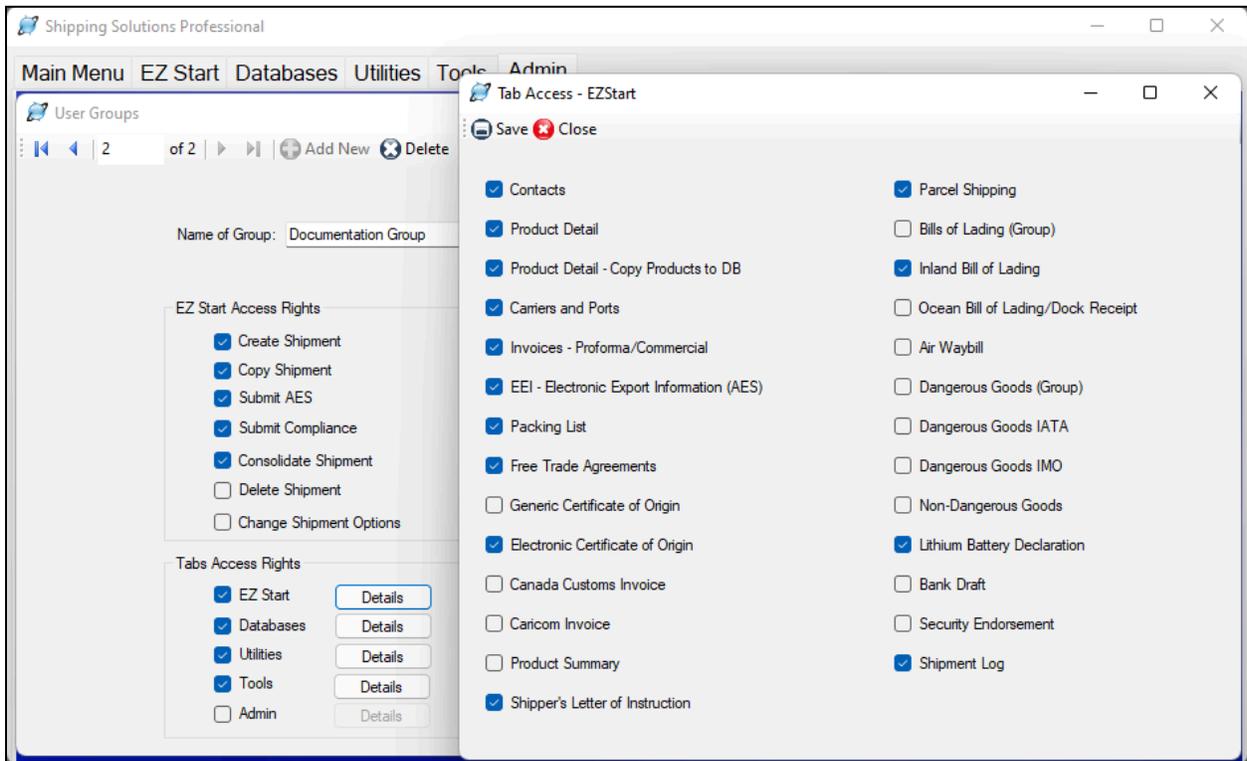
You may now create user accounts for each of your users. By assigning different user accounts you can grant different access rights to each user, and each user can have a different profile where their signature and compliance login can be stored.

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.

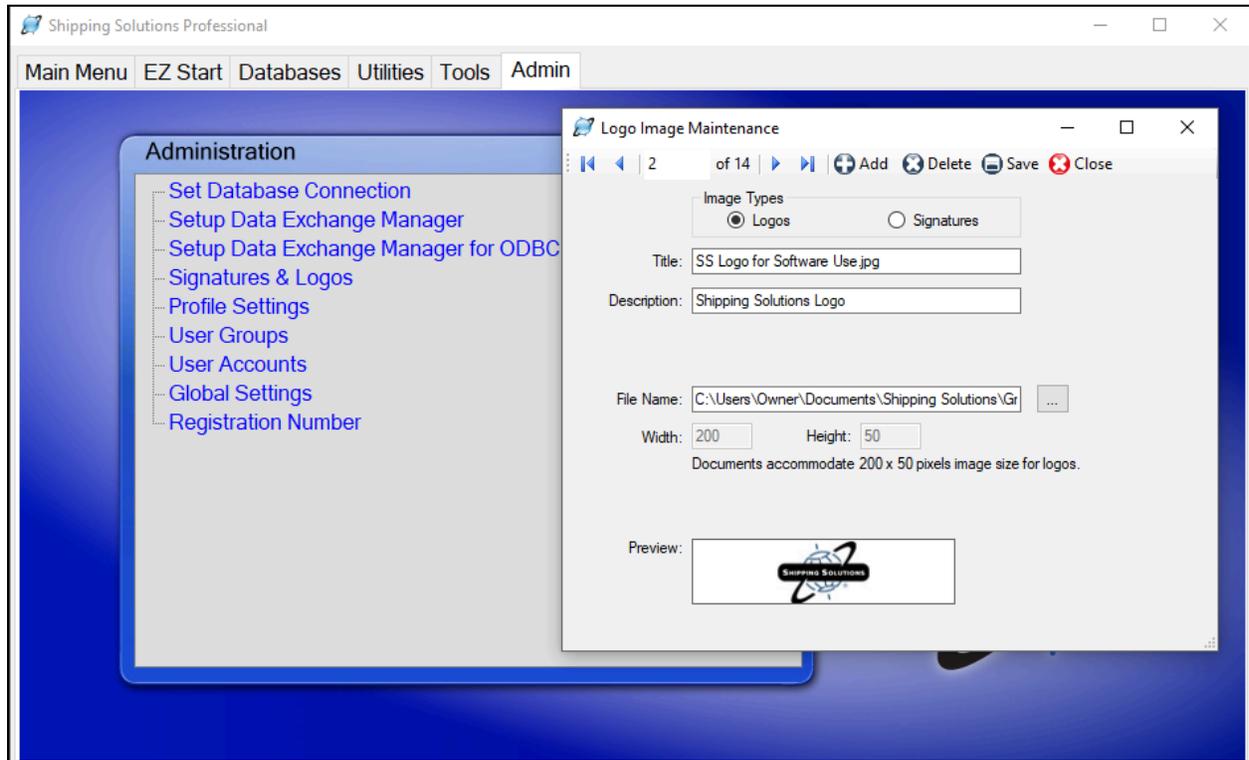
### **Admin**

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 to Shipping Solutions



## 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

The screenshot shows the 'Profile Settings' window with the following fields and options:

- Profile Details:** Profile Name: [Text Field]
- Compliance Login:** Compliance User Name: [Text Field], Compliance Password: [Text Field]
- eCO Login:** eCO User Name: [Text Field], eCO API Key: [Text Field]
- ACE Login:** ACE User Name: [Text Field], ACE Password: [Text Field], AES/EEI Email: [Text Field]
- Profile Signature:** No Signature (dropdown), [Image Upload Area], (Appears on Commercial and Proforma)
- Company Logo:** NoLogo.jpg (dropdown), [Image Upload Area], (Invoices, SLI and Packing List)
- Freight Forwarder Logo:** NoLogo.jpg (dropdown), [Image Upload Area], (Appears on OBL and Dock Receipt)
- Inactive Profile:**

## 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 in the full User Guide](#)). 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 retrieve your portal User Name and Password. Enter that **User Name**. In addition, Shipping Solutions will send you an email with your **eCO API Key**. Enter that key here. The password is not used in the Shipping Solutions software. The password is used for accessing the AWTCC portal. [For more information on the eCO process, see the full User Guide.](#)

### **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**.

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