User Guide



ShipSavvy

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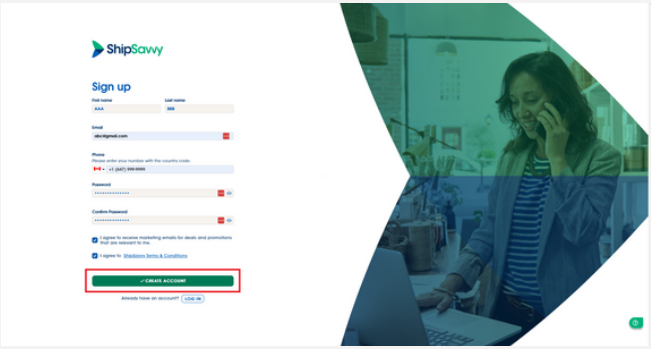
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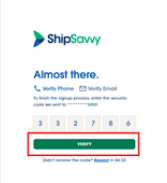
FIRST-TIME SET UP

Create your account

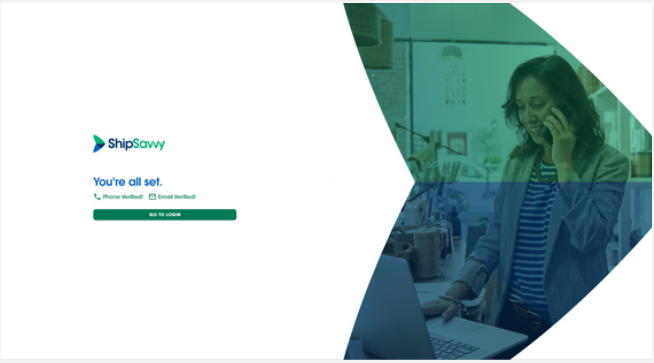
1. Please click on the following link: **www.shipsavvy.com/signup** fill out the required information and click on Create account.



2. You will receive an email and a phone code, please provide your phone passcode and verify. Confirm your email by clicking on confirm button.



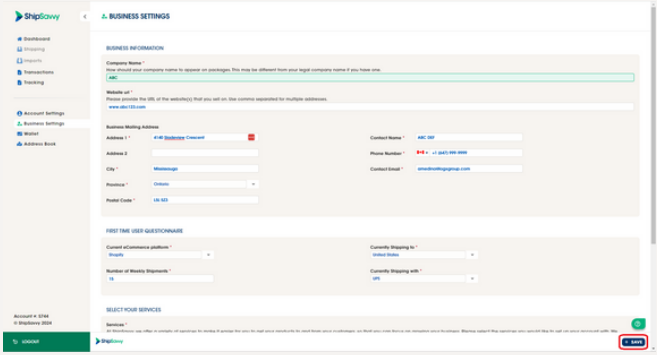
3. Click on Go to Login to start using ShipSavvy Services.



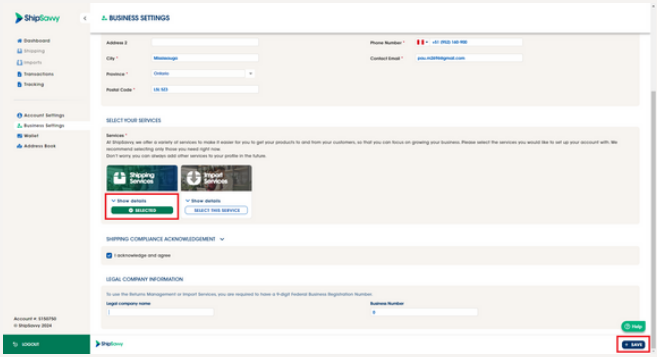
Business Settings and Service Selection

Shipping

1. Log In to your account. Complete the business settings info required and click on the Save button.



2. Select Shipping Services and Save.



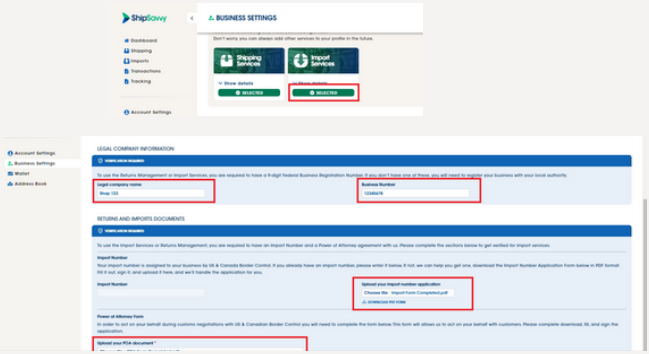
*Note: If you have a Legal Company Name and Business Number, please complete these fields.



Business Settings and Service Selection

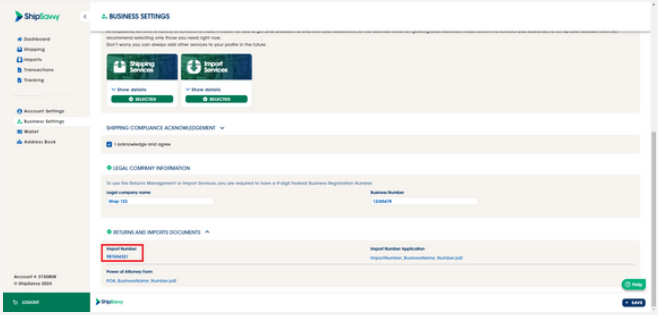
Imports

1. Select Import Services and complete the required information: business number, import number and POA. Click on Save & Upload.
Note: Our team will review your documents and verify your account for imports.



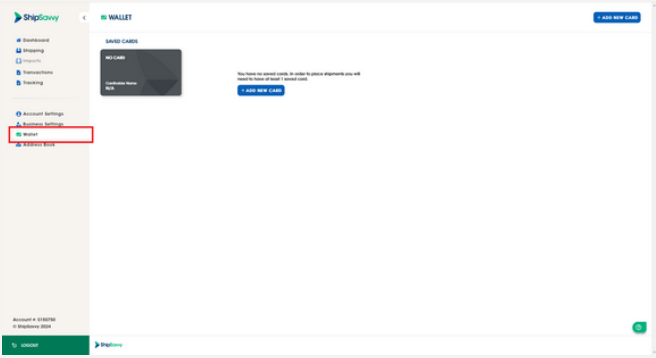
Note: If you don't have an Import Number, you can apply for an Import Number with us: download the Import Number form, complete it and upload it.

2. Once you have been verified by our team, you can start creating your imports. They will provide your Import Number and it will appear on your business settings.

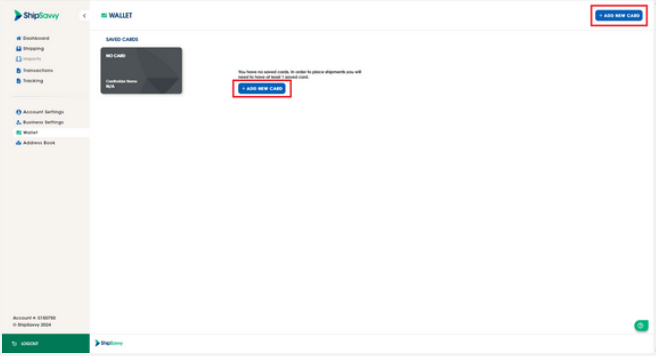


Add Payment options

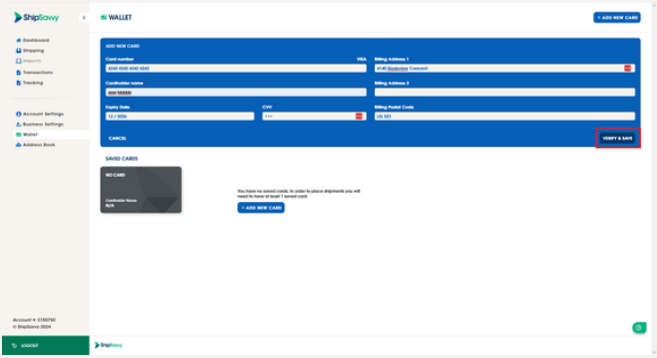
1. Click on the Wallet Tab located on the left-side bar



2. Click on Add New Card



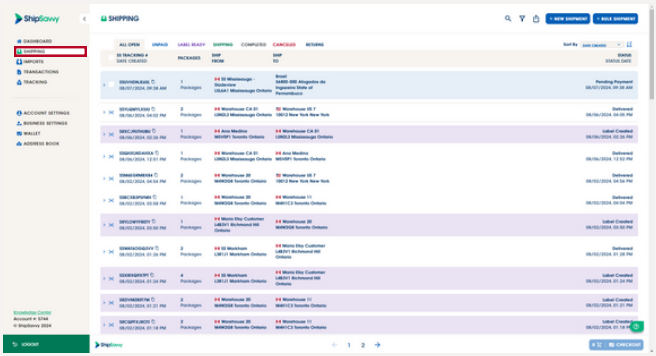
3. Complete the required fields and Save



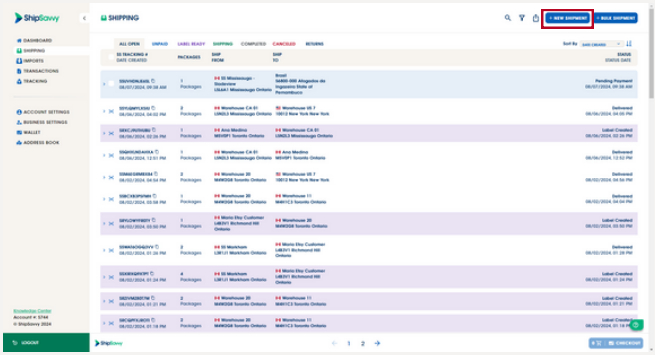
HOW TO CREATE A SHIPMENT

CA to CA Shipment Creation

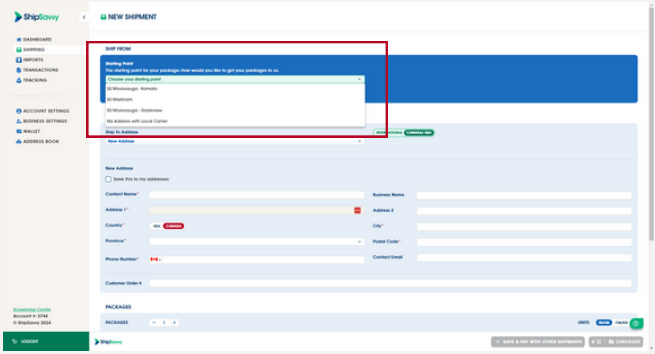
1. Click on the Shipping Tab located on the left-side bar



2. Click on + New Shipment

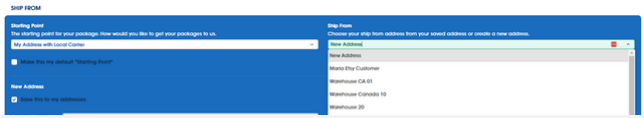


3. Choose your Ship From Address

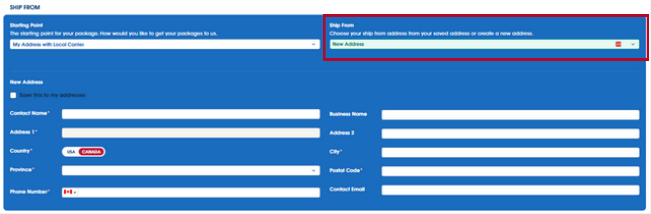


Note: You can select the checkbox to make this address your default starting point.

3.1 If you select your address with local carrier, you can choose to start with your saved Business Address or a New Address.



3.2 The option New Address will display an additional box. Complete all the required fields and continue.



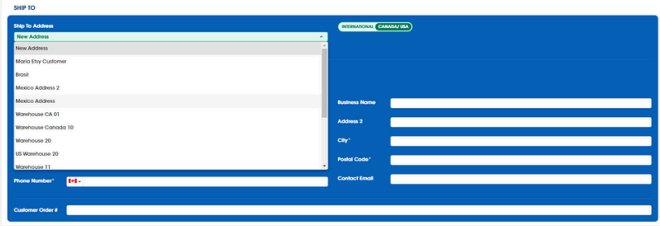
*Note: You can opt to save this address directly to your address book checking on the 'Save this to my addresses checkbox and you can also make this address your default Ship From checking on 'Make this my default "Ship From" address.



4. Complete the Ship To information. Select Canada/USA



5. Select one of your Saved Address or choose a New Address.



6. Complete the Ship To information. Select one of your Saved Address or choose a New Address.

Note: Check the Save this to my addresses box to save this address to you address book. You can also make this your default Ship To address and input your Customer Order #

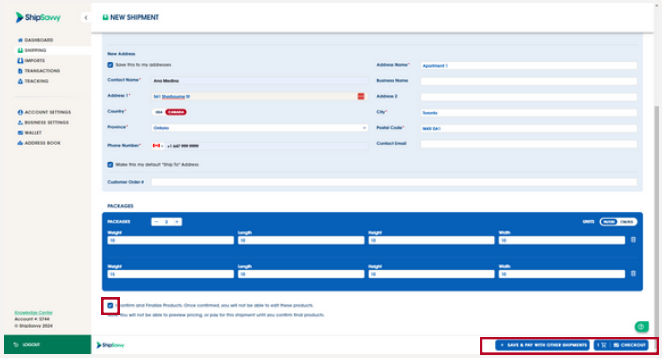


7. Complete the required package information.
Choose the units that you will use: in/lbs or cm/kg

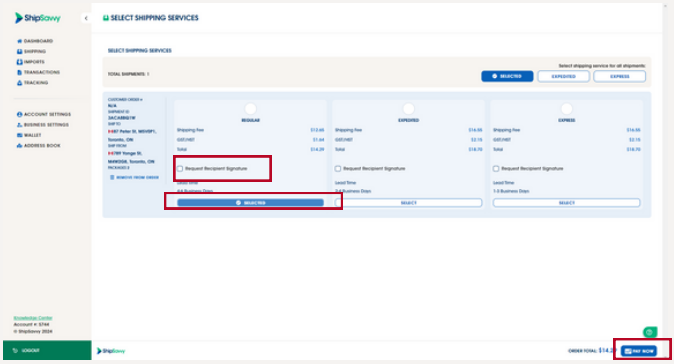
Note: Add more packages clicking on the + or eliminate them clicking on the - or trash button. You can add up to 10 packages.



8. Click on the checkbox to confirm and finalize products. Save & Pay with other shipments or go directly to checkout.



9. Select your preferred shipping service and click on Pay Now

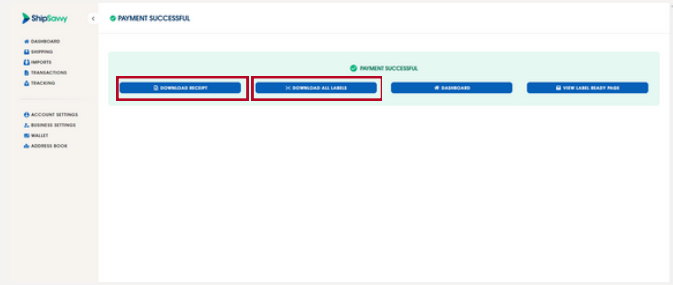


Note: If you would like to opt for Recipient Signature, click on the Request Recipient Signature checkbox.

10. Select the Credit Card that you would like to pay with and click on the checkbox to agree to the Terms & Conditions. Click on Complete Payment

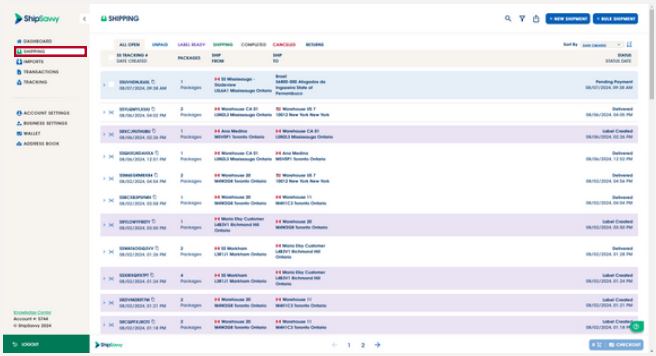


11. Download your receipt or labels once you completed payment

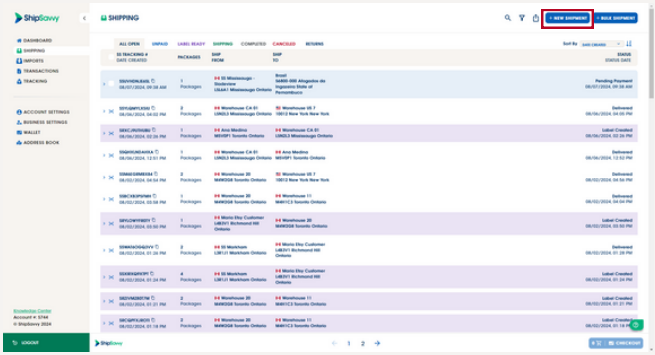


CA to US Shipment Creation

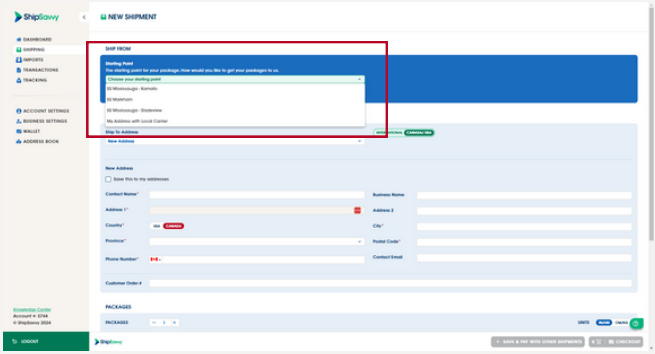
1. Click on the Shipping Tab located on the left-side bar



2. Click on + New Shipment

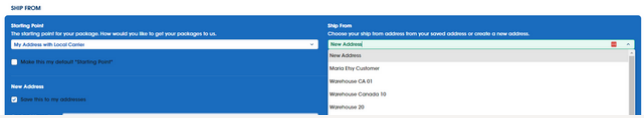


3. Choose your Ship From Address

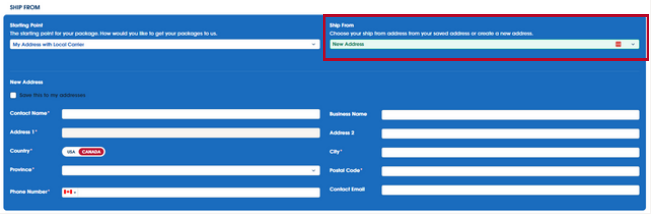


Note: You can select the checkbox to make this address your default starting point.

3.1 If you select your address with local carrier, you can choose to start with your saved Business Address or a New Address.



3.2 The option New Address will display an additional box. Complete all the required fields and continue.



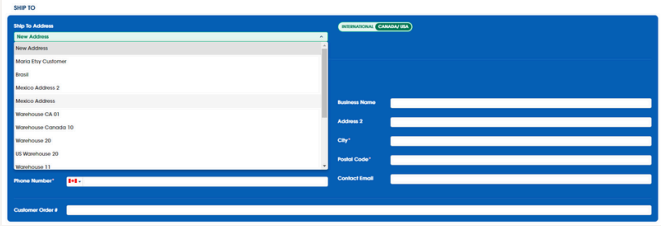
*Note: You can opt to save this address directly to your address book checking on the 'Save this to my addresses checkbox and you can also make this address your default Ship From checking on 'Make this my default "Ship From" address.



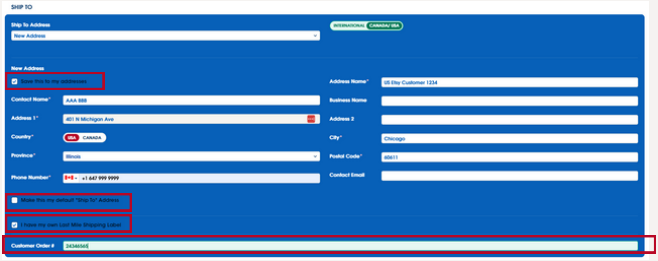
4. Complete the Ship To information. Select Canada/USA



5. Select one of your Saved Address or choose a New Address.



6. Complete the Ship To information. Select one of your Saved Address or choose a New Address.



Note: Check the Save this to my addresses box to save this address to you address book. You can also make this your default Ship To address, input your Customer Order # or provide your own last-mile label.

7. Complete the required package information.
Choose the units that you will use: in/lbs or cm/kg



Note: Add more packages clicking on the + or eliminate them clicking on the - or trash button. You can add up to 10 packages.

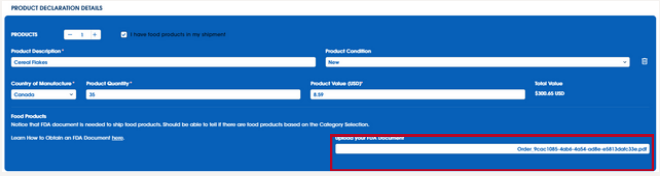
7.1 If you selected that you have your own last-mile label, complete the Carrier Name, Tracking # and Upload Label



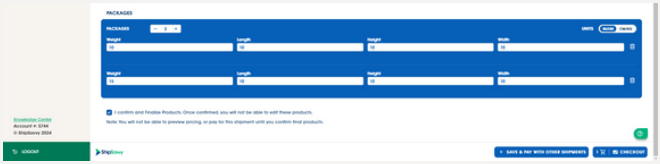
8. Complete the Product Declaration details



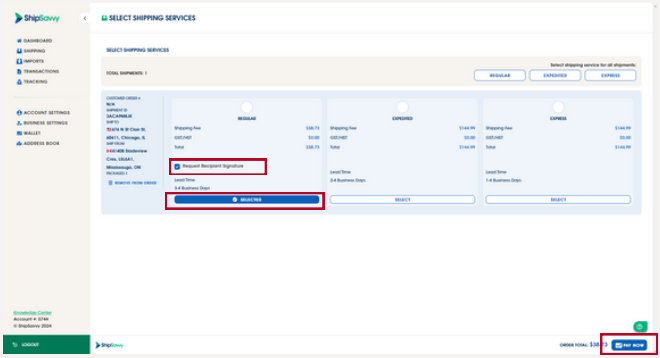
8.1 If the products you are shipping is food, you need to check the box of food products on my shipment and upload the FDA document.



9. Click on the checkbox to confirm and finalize products. Save & Pay with other shipments or go directly to checkout.

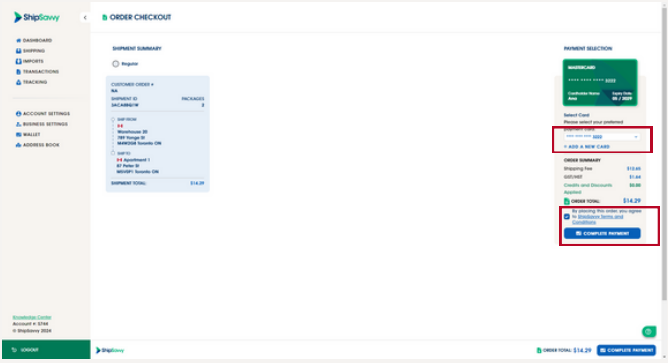


10. Select your preferred shipping service if you chose a Carrier pickup for the Ship From and click on Pay Now

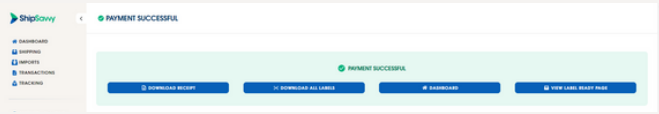


Note: If you would like to opt for Recipient Signature, click on the Request Recipient Signature checkbox.

11. Select the Credit Card that you would like to pay with and click on the checkbox to agree to the Terms & Conditions. Click on Complete Payment

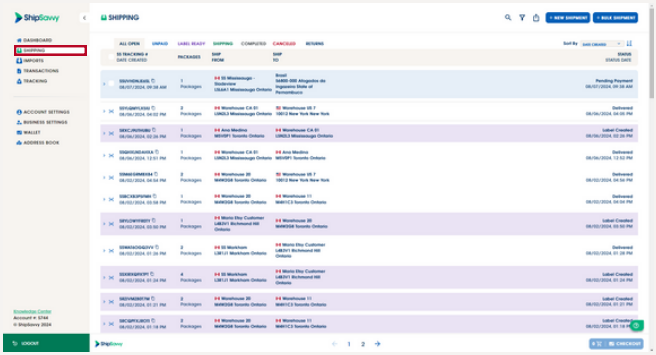


12. Download your receipt or labels once you completed payment

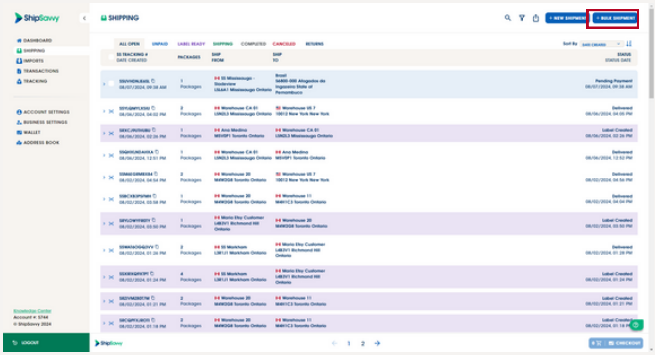


Bulk Shipment Creation

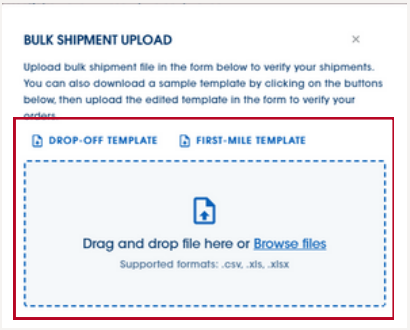
1. Click on the Shipping Tab located on the left-side bar



2. Click on Bulk Shipment

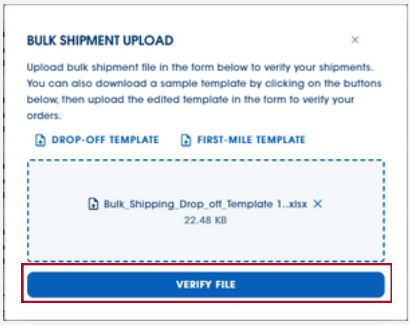


3. Download the template you would like to use, depending on your business needs. Complete the information requires and drag the files on the box.

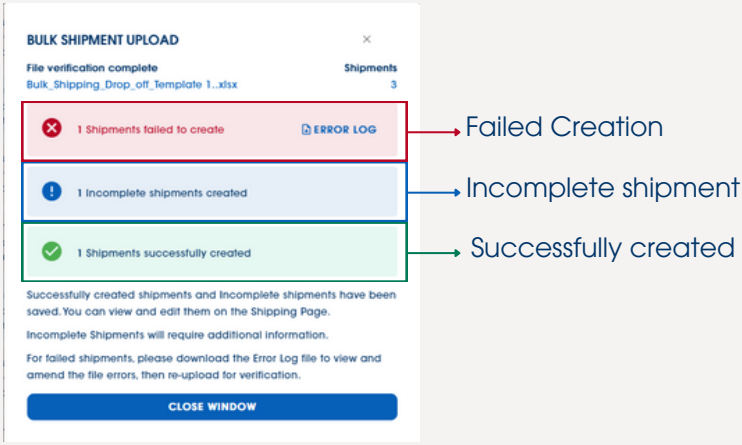


Note: You can use your old CBP Template if you have it, just drag and drop your file and our system will process it.

4. Click on Verify File button



5. After the file info is reviewed by the system, you will be able to see if your shipments were created successfully

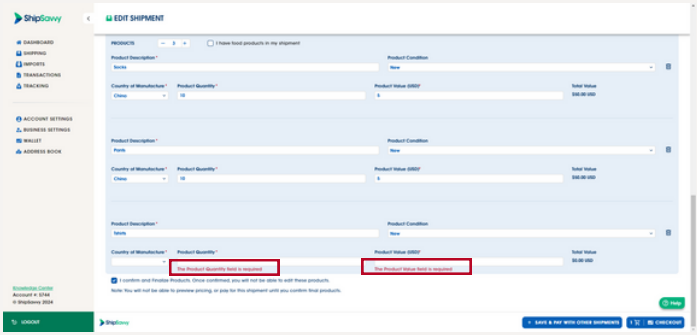


Incomplete shipment: If you were missing some necessary information on your file, the system will create incomplete shipments that you can edit, complete and checkout.

5.1 Click on the Edit button to provide the missing information

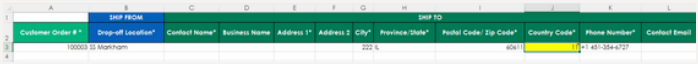


5.2 Complete the missing information and click on Save & Pay with other shipments.

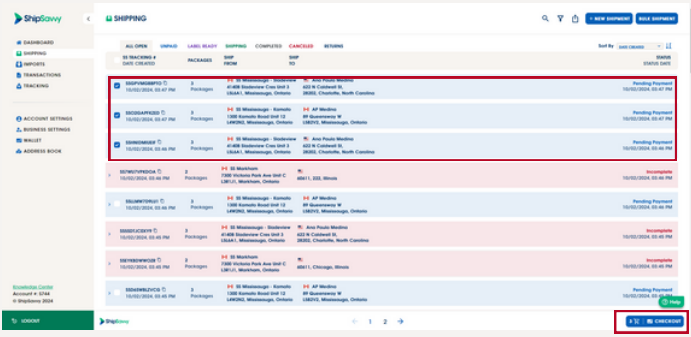


Failed Creation: If you provided wrong information for any of the required fields, you can download a file with your wrong lines by clicking on the ERROR LOG, correct your file and upload it again.

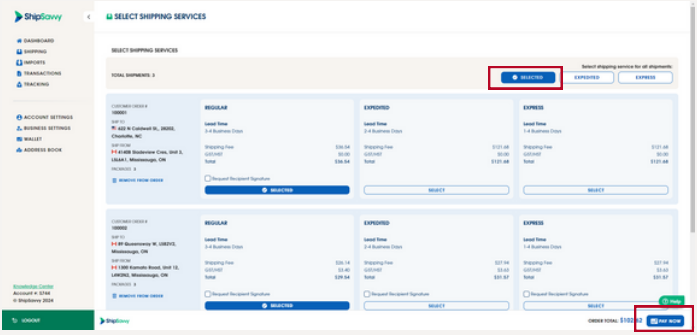
The incorrect fields will be highlighted and indicate what info you need to correct.



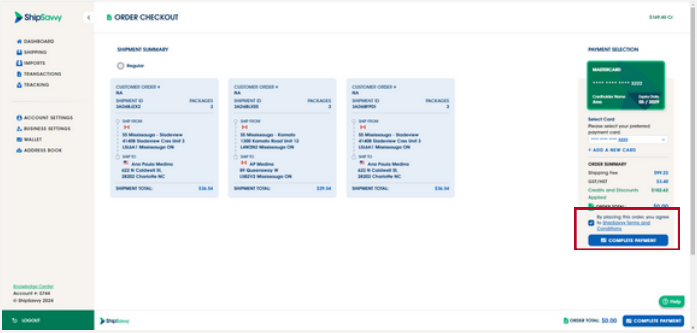
6. Select all the shipments that you want to checkout and click on the checkout button



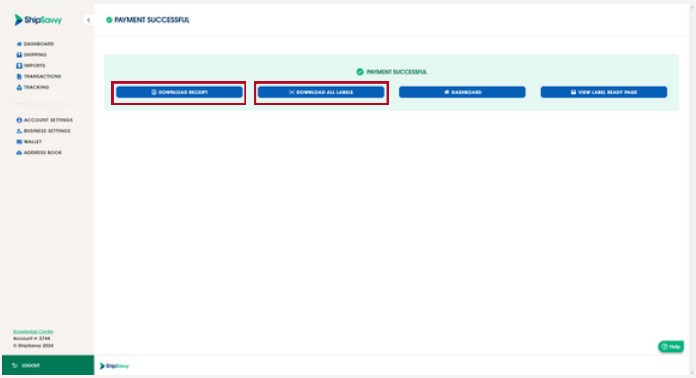
7. Select the shipping services that aligns to your needs and click on Pay now.



8. Select the Credit Card you would like to pay with. Click on the checkbox to agree to the SS Terms & Conditions and click on Complete Payment.

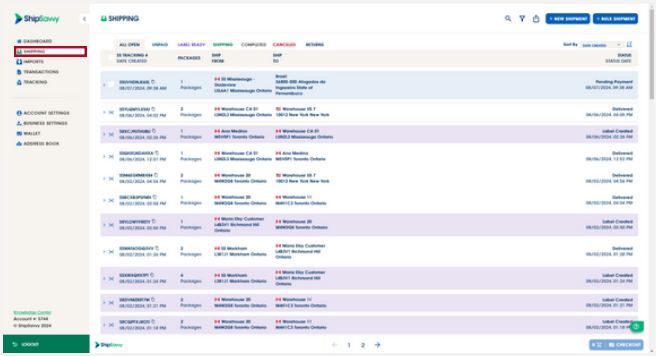


8. Download your labels and your receipts by clicking on each option.

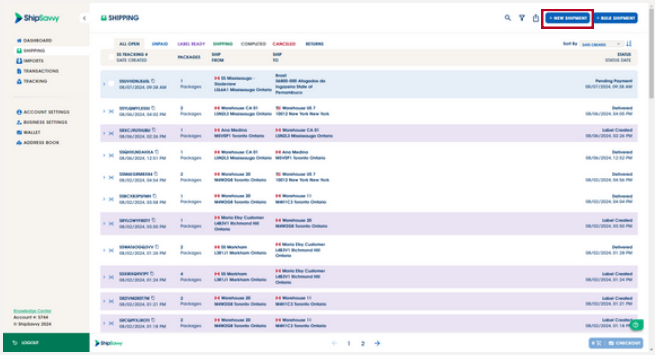


International Shipment Creation

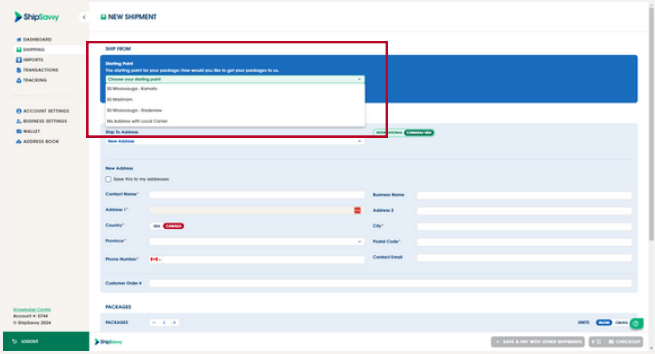
1. Click on the Shipping Tab located on the left-side bar



2. Click on + New Shipment

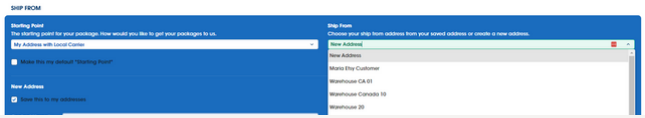


3. Choose your Ship From Address

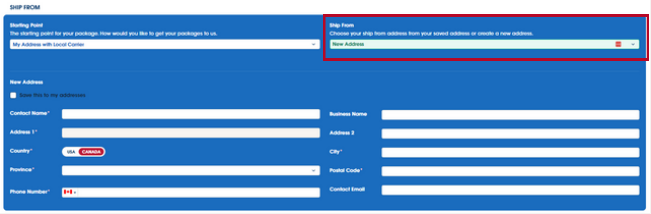


Note: You can select the checkbox to make this address your default starting point.

3.1 If you select your address with local carrier, you can choose to start with your saved Business Address or a New Address.



3.2 The option New Address will display an additional box. Complete all the required fields and continue.



*Note: You can opt to save this address directly to your address book checking on the 'Save this to my addresses checkbox and you can also make this address your default Ship From checking on 'Make this my default "Ship From" address.



4. Complete the Ship To information. Select INTERNATIONAL



5. Select one of your Saved Address or choose a New Address.



6. Complete the Ship To information. Select one of your Saved Address or choose a New Address.

Note: Check the Save this to my addresses box to save this address to you address book. You can also input your Customer Order # .



7. Complete the required package information.
Choose the units that you will use: in/lbs or cm/kg

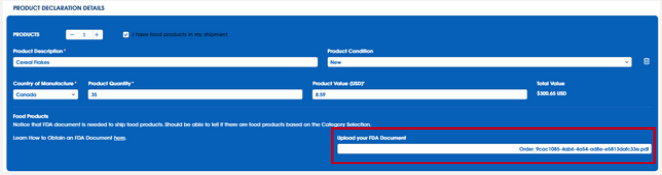
Note: Add more packages clicking on the + or eliminate them clicking on the - or trash button. You can add up to 10 packages.



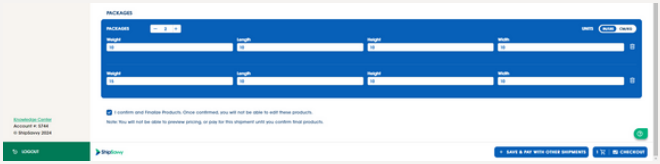
8. Complete the Product Declaration details



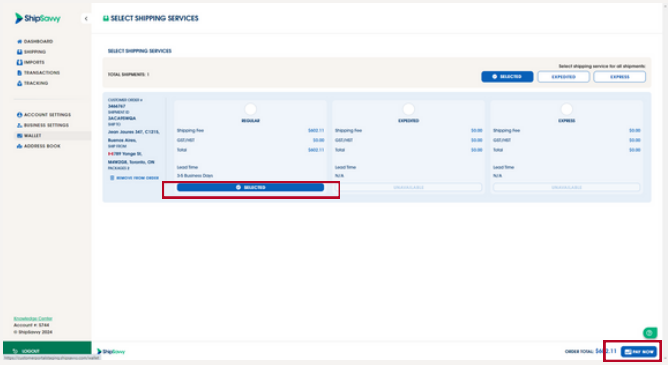
8.1 If the products you are shipping is food, you need to check the box of food products on my shipment and upload the FDA document.



9. Click on the checkbox to confirm and finalize products. Save & Pay with other shipments or go directly to checkout.



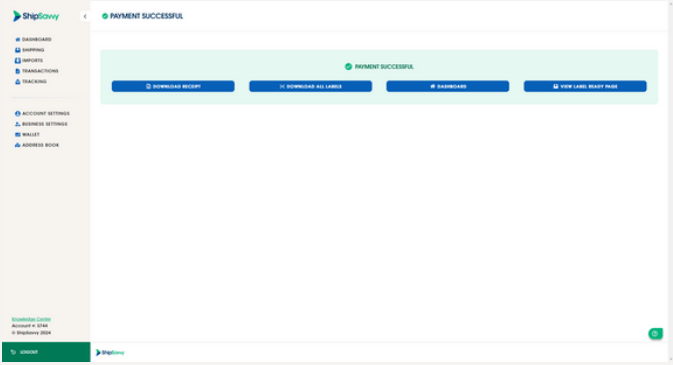
10. Select your preferred shipping service and click on Pay Now



11. Select the Credit Card that you would like to pay with and click on the checkbox to agree to the Terms & Conditions. Click on Complete Payment



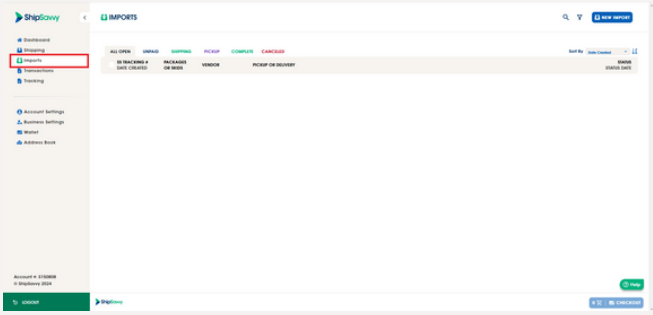
12. Download your receipt or labels once you completed payment



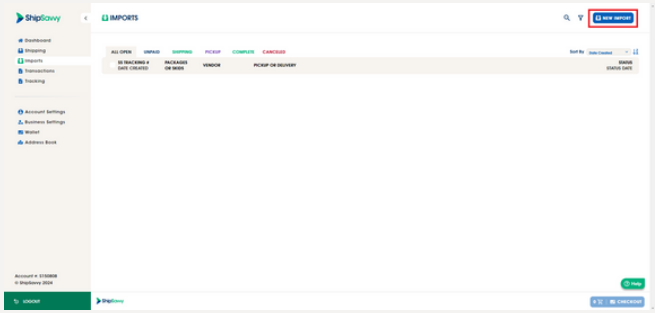
HOW TO CREATE AN IMPORT

New Import Creation

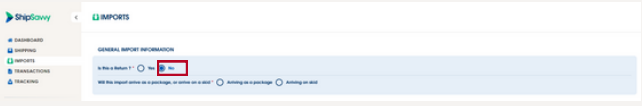
1. Click on the Import Tab located on the left-side bar



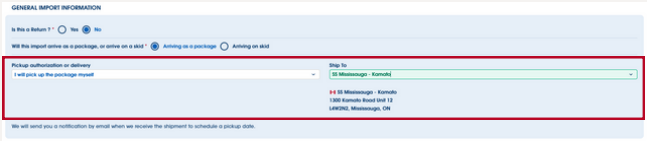
2. Click on + New Import



3. On the Return question, choose No and then select if your import will arrive on a skid or a package

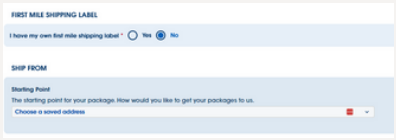


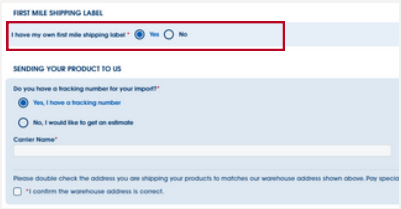
4. Choose your Pickup location



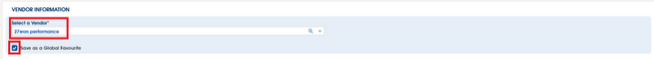
Note: If you would like to opt for a delivery to your address, please send your product to us and wait until our team creates the order for you. Once you completed the required information you would be able to select delivery.

5. Select Yes or No, on the First-mile shipping label. If you would like us to provide you with a shipping label, click No.
Note: If you select No, please provide our Ship From address, if you select Yes, please provide your Carrier Name and verify the warehouse Address.





6. Search and select your Vendor name.



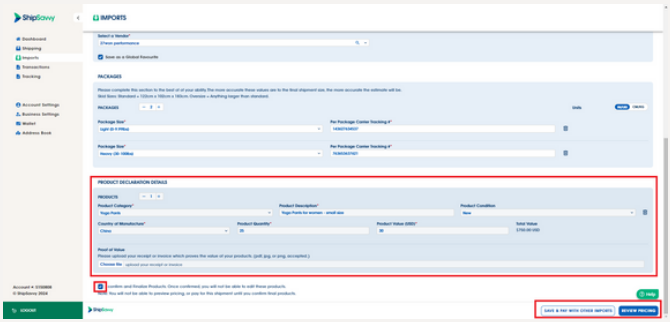
Note: If you want to save this vendor in your Global favorites, click on the checkbox,

7. Complete your Package information. Select the unit of measure of your package. You can add up to 10 packages.
Select any of our size options and provide your package Tracking Number if you will be sending your product to our warehouse.

Provide the exact size of your packages if you opted for a first-mile shipping label with us.

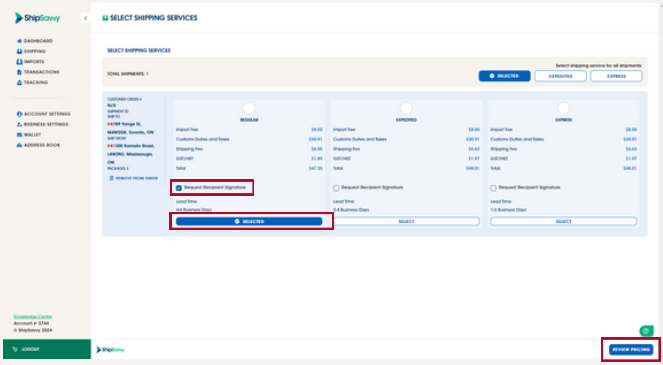


8. Complete the product declaration details required. Check the box to confirm and finalize products. You could either Save and pay with other imports or click on Review Pricing.



9. Select your preferred shipping service if your package will be delivered at your address, and click on Pay Now

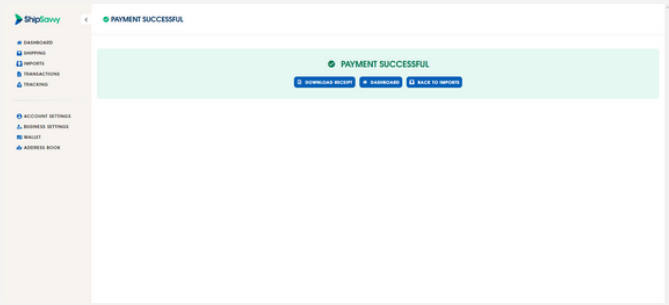
Note: If you would like to opt for Recipient Signature, click on the Request Recipient Signature checkbox.



10. Select the Credit Card that you would like to pay with and click on the checkbox to agree to the Terms & Conditions. Click on Complete Payment

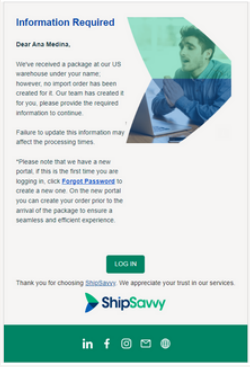


11. Download your receipt once you completed payment

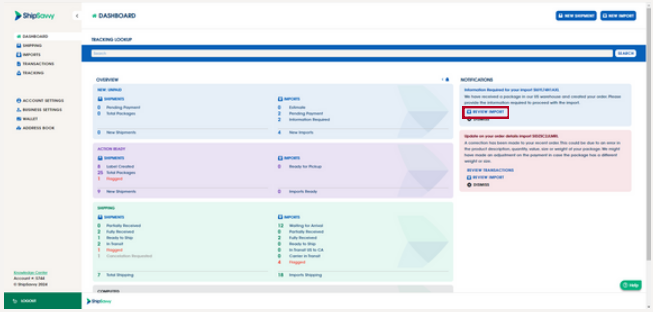


Complete an Admin Created Import

1. You will receive an email once our team has received your package and create your import. Please click on Log In.

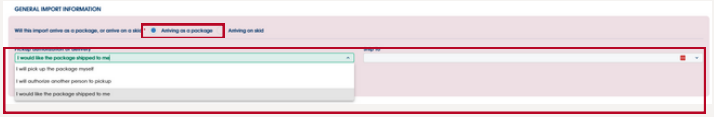


2. Once in the portal, go to your dashboard and on the notification, click on Review Import.



3. Complete and verify your general import information. In some cases the info would be already populated by our team; if not, please complete it.

Select if your product arrived as a package or skid.
Choose from pickup, authorized pickup or delivery to your home address option. If you select the last one, please provide your final address or choose one of your saved address.



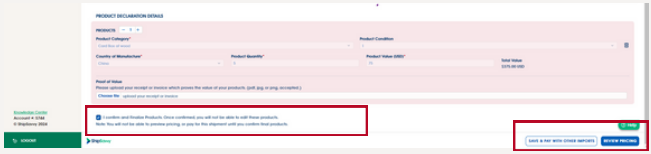
4. Provide your carrier name and click on the checkbox to confirm the warehouse address.
Pd: this usually will be completed by our team if they have the info.



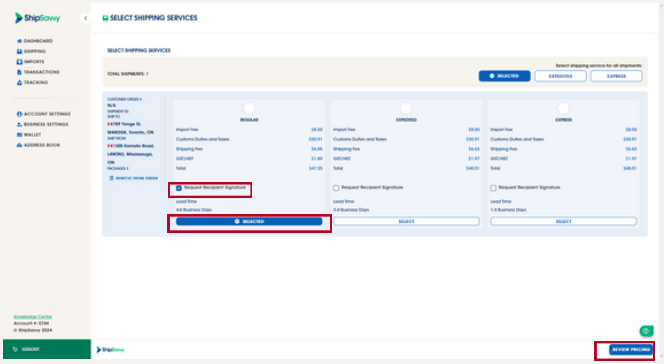
5. Complete and verify your package and product information



6. Confirm and Finalize products by checking the box. Click on Review Pricing or Save and pay with other imports if you want.

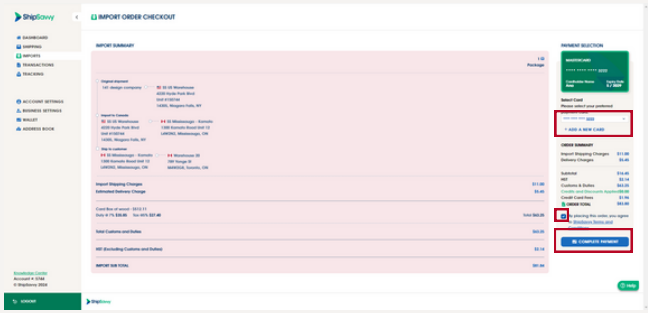


7. Select your preferred shipping service if your package will be delivered at your address, and click on Review Pricing

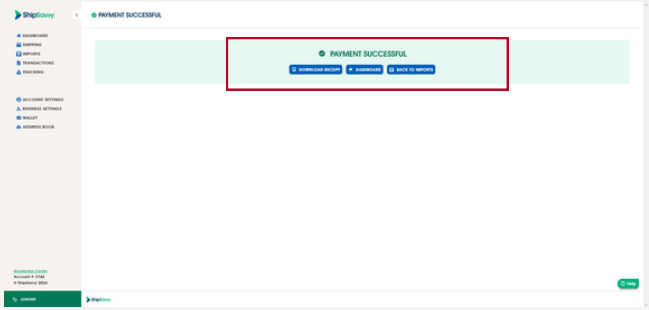


Note: If you would like to opt for Recipient Signature, click on the Request Recipient Signature checkbox.

9. Select a saved credit card or add a new one.
Click on the checkbox to confirm SS Terms & Conditions and click on Complete Payment.button



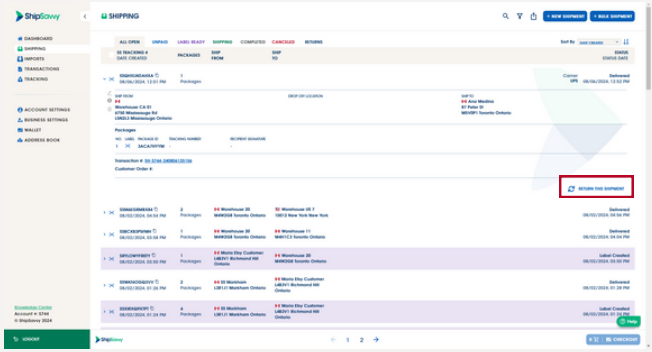
10. After you successfully paid, you can download your receipt or go back to your dashboard or to imports



HOW TO START A RETURN

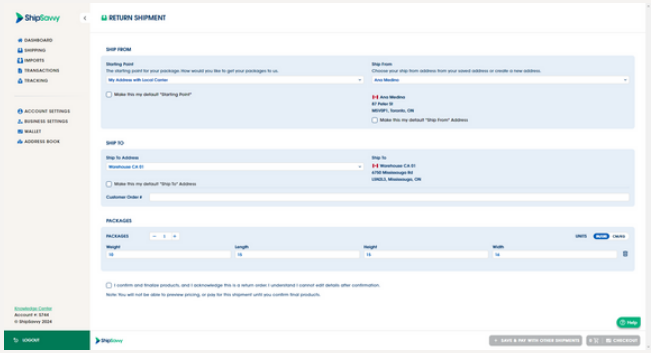
Start a Return from a CA to CA Completed Shipment

1. Go to your Shipping Tab and identify the order that you would like to return. Open the order and click on Return this shipment.

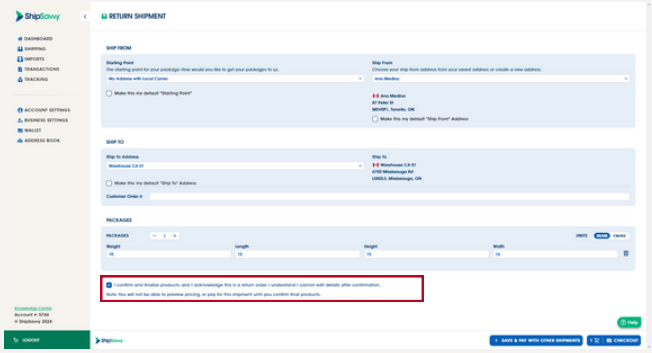


2. The Ship From, Ship To and Package information will pre-populated.

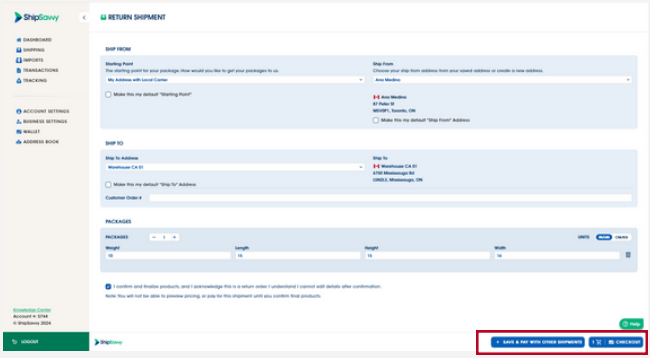
Note: You are able to change or update this information if you want.



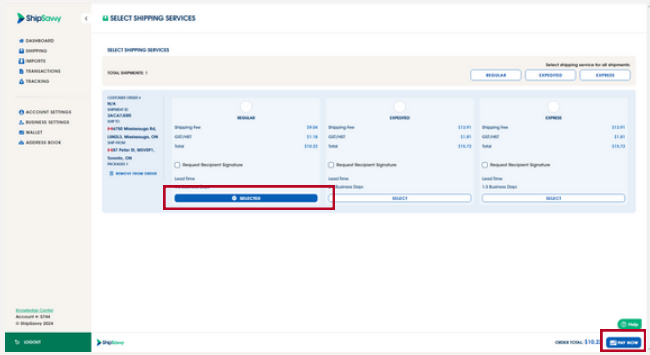
3. Click on the checkbox to Confirm and Finalize products.



4. Click on Review Pricing to go to payment or Save & Pay with other shipments if you would like to pay later.

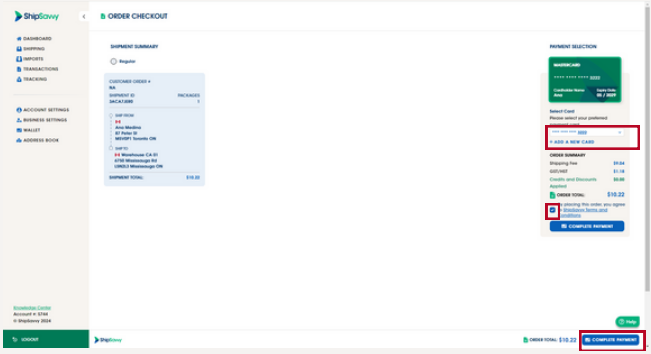


5. Once you clicked on checkout button, choose your preferred shipping service and click on Pay Now.



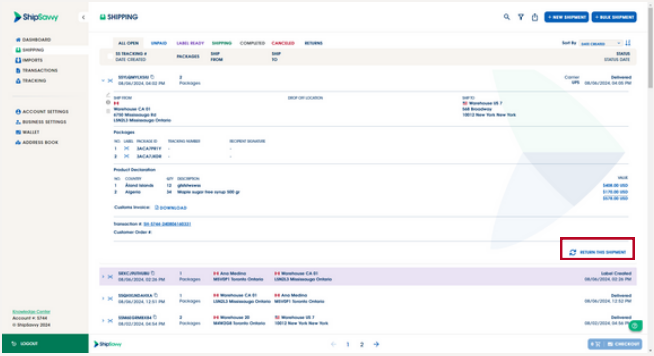
Note: If you would like to opt for Recipient Signature, click on the Request Recipient Signature checkbox.

6. Select the credit card for the payment, agree to the Terms & Conditions and click on Complete Payment.

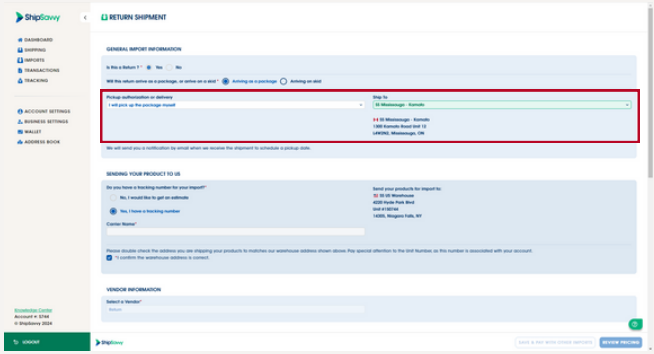


Start a Return from a CA to USA Completed Shipment

1.Go to your Shipping Tab and identify the order that you would like to return. Open the order and click on Return this shipment.

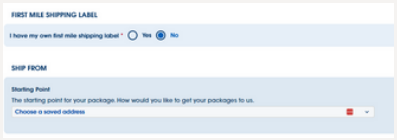


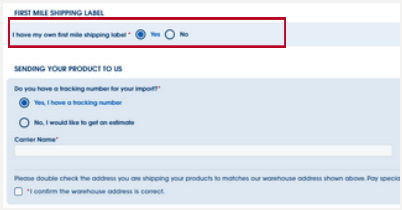
2. Select your pickup location



Note: If you would like to opt for delivery, just send your packages to our warehouse address and wait until our team creates your order.

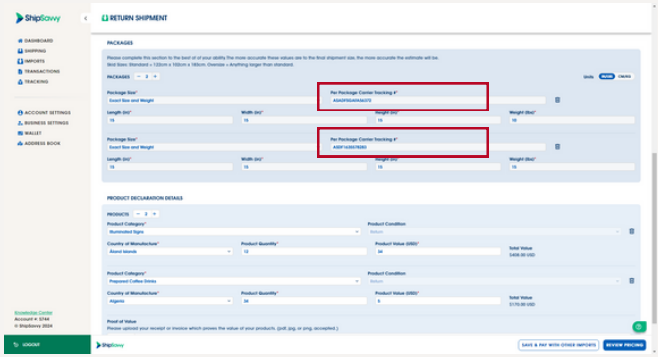
3. Select Yes or No, on the First-mile shipping label. If you would like us to provide you with a shipping label, click No.





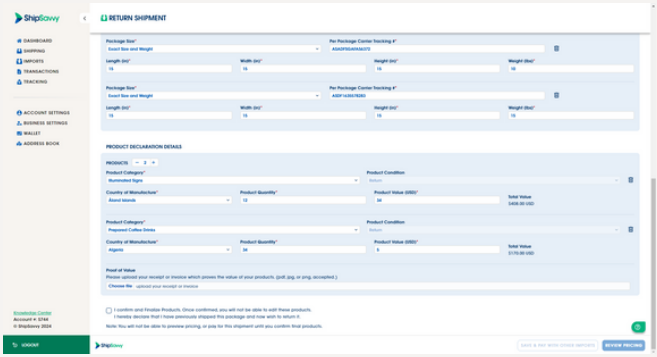
Note: If you select No, please provide your Ship From address, if you select Yes, please provide your Carrier Name and verify the warehouse Address.

4. Your Package information will be pre-pulated. Provide you Carrier Tracking Number if you will sending your product to our warehouse.

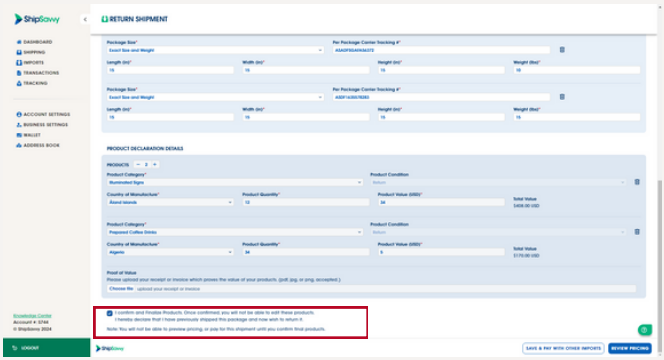


Note: You are able to change or update this information if you want.

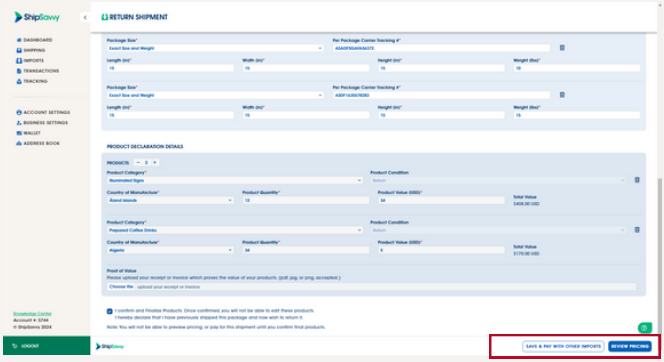
5. Complete your products category. The rest of the product declaration details, you could adjust product quantity and product value if you want.



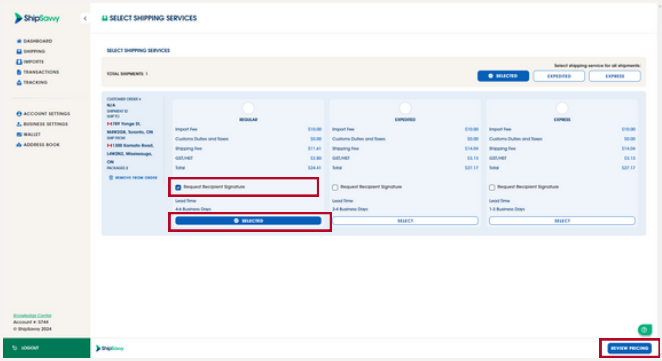
6. Confirm and Finalize Products.



7. Click on Review Pricing to go to payment or save and pay with other imports if you would like to pay later.



8. Choose your preferred shipping service if you will get your package delivered to your address and click on Review Pricing.



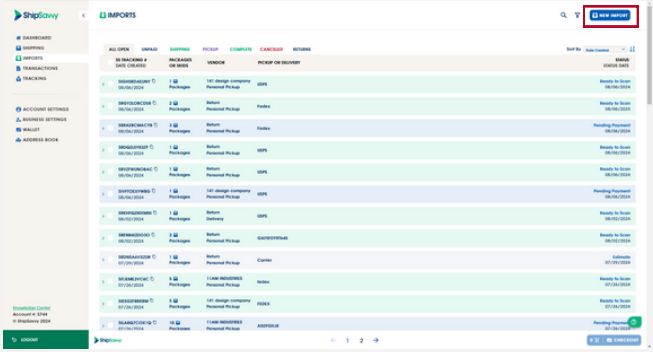
Note: If you would like to opt for Recipient Signature, click on the Request Recipient Signature checkbox.

9. Select your Credit Card and click on the checkbox to agree to the Terms & Conditions and click on Complete Payment button.

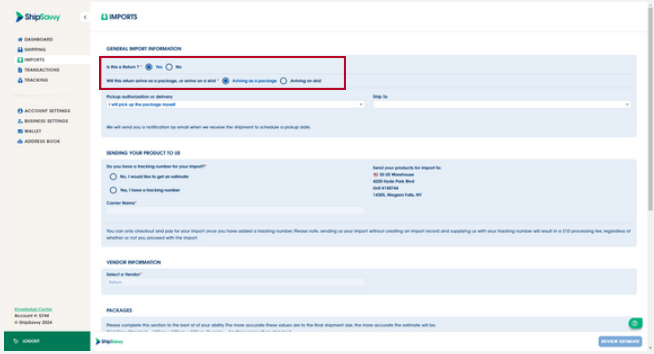


Start a new Return from US to CA

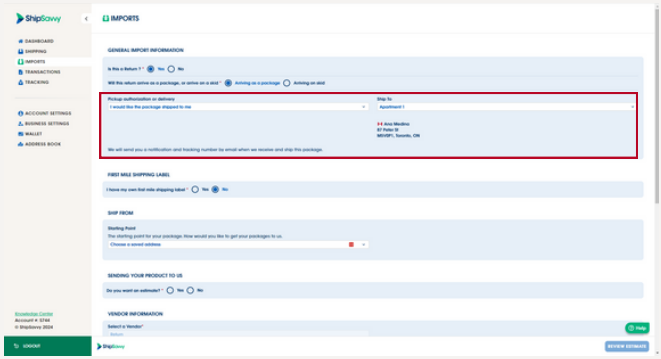
1.Click on New Import



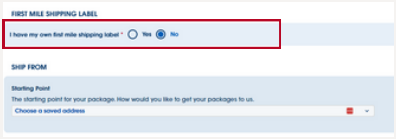
2. Select Yes on the Return and choose if it is a package or a skid

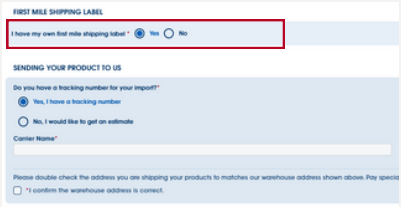


3. Choose your pickup location



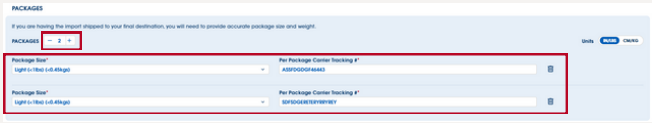
4. Select Yes or No, on the First-mile shipping label. If you would like us to provide you with a shipping label, click No.





Note: If you select No, please provide our Ship From address, if you select Yes, please provide your Carrier Name and verify the warehouse Address.

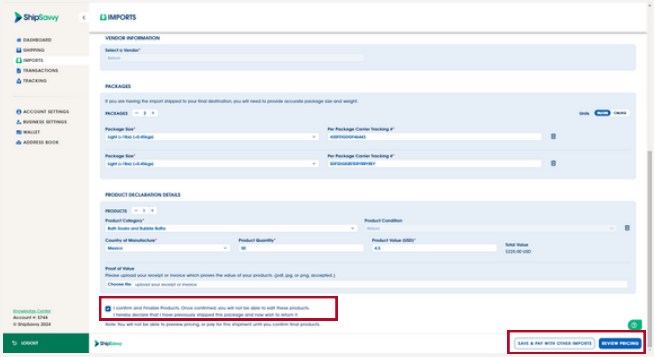
5. Complete your Package information. Select the unit of measure of your package, select the size and provide the tracking number.
You can add up to 10 packages.



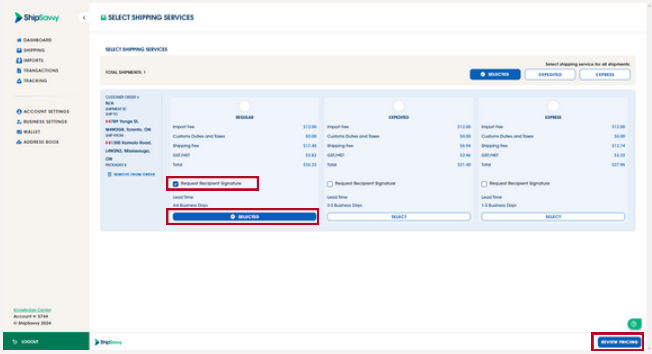
6. Complete your Product Declaration Details information. Select the unit of measure and provide the size and tracking number.



7. Click on the checkbox to Confirm and Finalize Products and click on Review Pricing or Save & Pay with other Imports



8. Select the Shipping Service that you would like if you have opted for a delivery to your address. Click on Review Pricing.

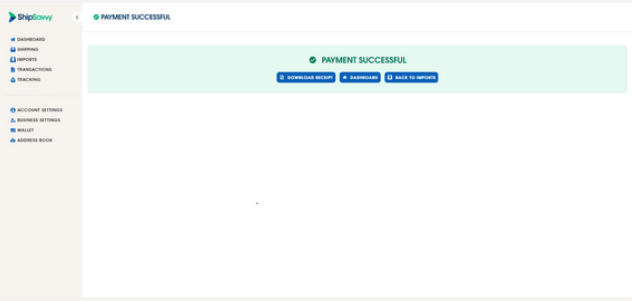


Note: If you would like to opt for Recipient Signature, click on the Request Recipient Signature checkbox.

9. Select the Credit Card you would like to pay your order with. Click the checkbox to agree to the Terms & Conditions and then click on Complete Payment.



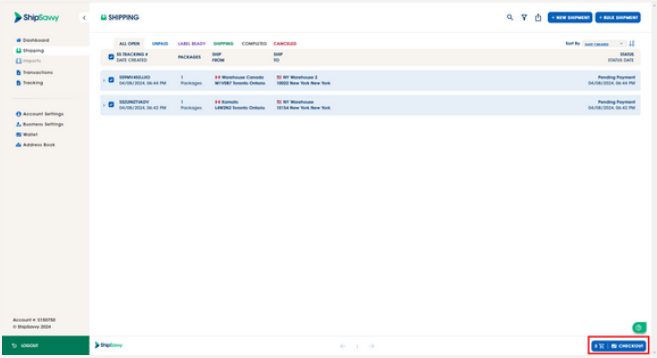
10. Once you have Successfully completed the payment, download your receipt.



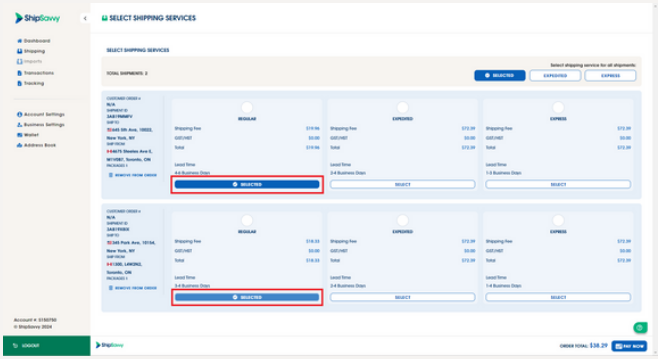
CHECKOUT YOUR SAVED SHIPMENTS OR IMPORTS

Checkout and payment

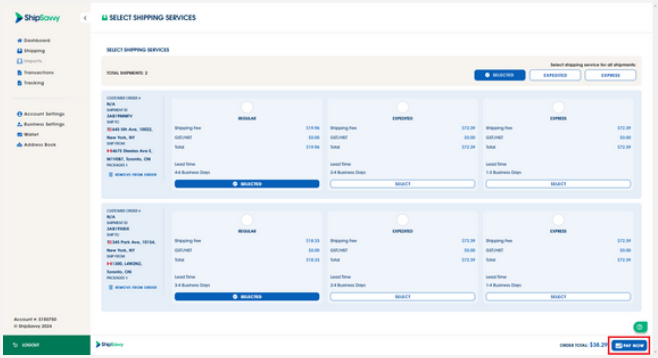
1. From the list of unpaid orders, select the ones that you would like to pay and click on the Checkout button.



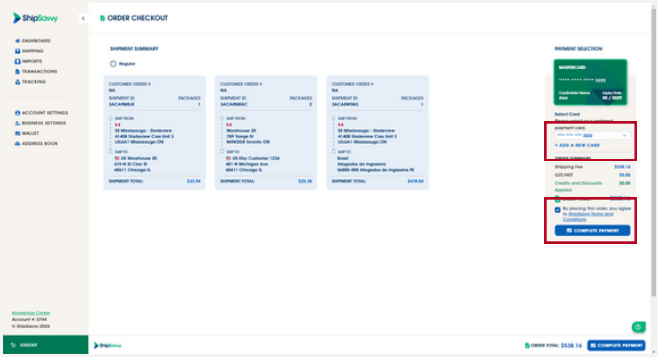
2. Select the type of service that you would like for each order.



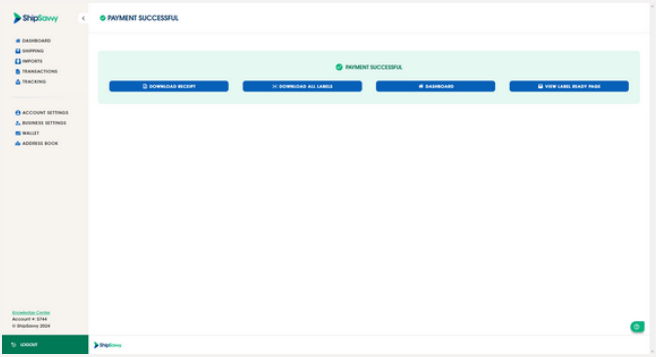
3. Click on Pay Now to continue with payment.



4. Select the Credit Card you would like to pay with. Click on the checkbox to agree to the Terms & Conditions. Click on Complete Payment.



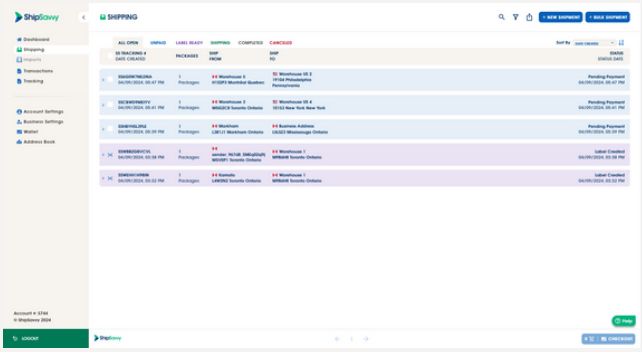
4. Once your payment is completed, download your receipt and your labels.



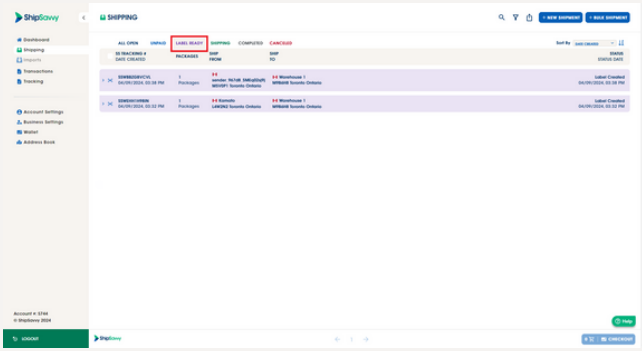
HOW TO CHECK MY ORDER STATUS

Orders status

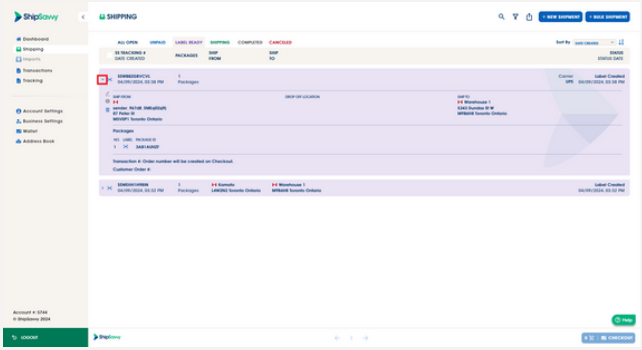
1. Click on the Shipping tab located on the left side bar



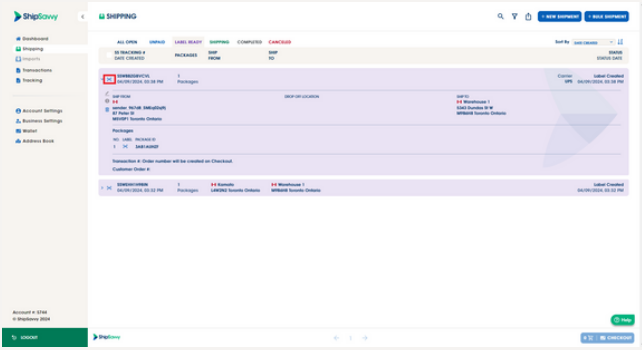
2. Choose the status of the order that you would like to review



3. Click on the order to review the details of the order



You can download your labels from here, clicking on the barcode

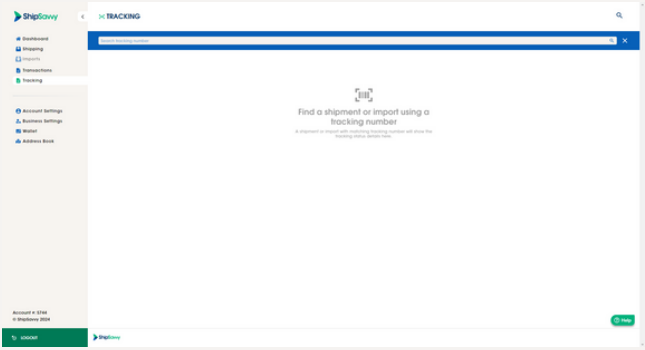


Note: If you would like to edit, cancel or pay for any order, you can select any of those options from here.

HOW TO TRACK MY ORDERS

Track your orders

1. Click on the Tracking tab located on the left side bar



2. Complete the tracking number of the order that you would like to search and click on the search button

