

Aardsma Technology Services
Batch Shipping Module for ClickCartPro

User Documentation

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0.1 Legal Notices

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Liability

You are solely responsible for how you use the information in this manual, including any loss of revenue or other damages that might result from your use or misuse of the information.

Chapter 1

User Documentation

The Batch Shipping Module is sold on the ATS website at <http://www.aatechservices.com>.

1.1 How the Module Works

The Batch Shipping Module increases your efficiency and accuracy by streamlining your interaction with ClickCartPro when packing and shipping orders.

- All the information you need to pack and ship all unshipped orders is displayed on the batch shipping screen.
- That screen can be printed and used as a picking list by warehouse staff.
- As each order is shipped (or left pending) you click new status for that order on the batch shipping screen.
- There's a place to enter the UPS or other shipping tracking number for each order, and a checkbox if you want the tracking number emailed to the customer.
- You click one submit button at the bottom of that batch shipping screen and the module updates the status, tracking number, and ship date for every item and order on the screen. The module also sends shipment notice emails (with tracking numbers) as indicated by the options you checked.
- The batch shipping screen is redisplayed showing any orders that are still unshipped.
- Your customers can then access their order status and tracking information by clicking the "order tracking" link on your site.

The Batch Shipping Module also includes the ability to download name and address data for all unshipped orders. This data can be used with a program such as Microsoft Word to print shipping labels. See the section on that later in this document.

1.2 How to Use the Module

Once ATS has installed the Batch Shipping module on your site, login to the ClickCartPro admin area and click on Main Menu - Orders & Payment. You'll see a new option near the bottom of that menu named "Batch Process Orders". Click that option to display the Batch Shipping start screen. That screen contains two links. The first link allows you to download data for shipping labels, the second opens the Batch Shipping screen in a new window. Anytime you want to ship orders, click the second link to begin.

The Batch Shipping screen is displayed with no graphics or menus for clean printing. That's also why it opens in a new window.

On the screen you'll see one row for each unshipped order. Work through the orders one at a time, packing and preparing them for shipment. If the items for an order are out of stock, don't click to change the status for that order. Otherwise, when each order has been packed and shipped, click the radio buttons on the left to change the status to "Completed" for that order, select the shipper (UPS, USPS, etc), and enter the shipment tracking number in the tracking number field. Check the box for "Send email to customer" if you want the customer to receive a shipment notice email containing the shipment tracking number.

Repeat that process for each order you want to ship. When you are finished, click the "Submit" button at the bottom of the screen. Once you click submit, the Batch Shipping module updates the status, tracking number, and ship date for every item and order you shipped. The module also sends shipment notice emails (with tracking numbers) as indicated by the options you checked.

1.3 How to Edit the Shipment Notice Email Message

To edit the wording of the shipment notice email message, go to the ClickCartPro admin area and click Main Menu - HTML Pages & Elements - Manage Mail Elements, then click "update" next to the "Shipment Notice" entry.

1.4 How to Use the Shipping Labels Data to Print Shipping Labels

These instructions assume you are using Microsoft Word XP.

1. Go to the ClickCartPro Admin – Main Menu – Orders & Payment – Batch Process Orders
2. Click "Download Data for Shipping Labels". Save the file to your computer.
3. Open word, select "Tools", "Letters and Mailings", "Mail Merge Wizard".
4. Select the "Labels" radio button (in the side menu) and click "Next: Starting Document".
5. Select the starting document: Select either "Change document layout" or "Start from an existing document" (if you already have a label template made).
6. If you selected "Change document layout", click on "Label Options" and select the label you will be using, click "OK".

7. If you selected “Start from an existing document”, you will see a window with your previously used mail merge templates. Select the one you want to use and click “Open”.
8. Click “Next: Select Recipients”.
9. Select “Use an existing list” and click “Browse”. Navigate to the downloaded labels text file, select it and click “Open”.
10. You will see a window with the data from the labels export, with each record already checked off. If you do not want to include some orders, uncheck the corresponding box. Click “OK” in the window. Now click “Next: Arrange your labels” on the side menu to go to the next step.
11. You will see a page full of code that says “Next Record”. The first label will not have this code. That’s how it’s supposed to be. Leave those in place. You must now insert the code for each address line. Enter your cursor in the first, empty label that doesn’t have the “Next Record” code.
12. Click on “More Items” and select “Database Fields”. One by one, select a field you want on the label and click “Insert”. When done, click “close”.
13. On the label, arrange the code by entering spaces between fields or line breaks. Put your cursor before the field you want to move, then click either the space bar or enter. Continue until it is formatted as you want. When finished, click on “Update all labels” on the right.
14. All the regular Word formatting applies; if you just select the code then apply formatting. When finished, click “Update all labels”.
15. If you want to add your return address, type it in the area you want (in the first label), then click “Update all labels”.
16. Click on “Next: Preview your labels”.
17. If everything looks good, click “Next: Complete the merge”.
18. If you want to edit any individual labels, do so now. Otherwise, click on “Print”.
19. When finished, save the document to preserve the layout. It will also save the recipients, but next time you can select the document (refer to #3) and change the recipient list (in #5).

Chapter 2

Software Revision History

- 2005-04-21A: Redesigned the layout and color scheme.
- 2005-04-21A: Added support for partial shipments.
- 2005-04-21A: Fixed updating of shipdate and tracking method on item level.
- 2005-04-21A: Started tracking revisions.

Chapter 3

Technical Support and Feedback

ATS provides full technical support for our modules. Contact us at support@aatechservices.com or 815-686-2705 if you need assistance.

Let us know how we can improve our sales, installation, and documentation process. If you have suggestions please contact us and let us know.

Sincerely,
Mark A. Aardsma — Owner
Aardsma Technology Services