User Guide

Your easy-to-use guide for WorldShip®

WorldShip®
Shipping Software

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Here's your step-by-step guide to efficiently automate your shipping tasks. With WorldShip, you can quickly process all your UPS shipments, print labels and invoices, electronically transmit daily shipping information to UPS and track your shipments.

Shipping

Processing shipments

Processing a single-piece shipment

For a dedicated guide on processing a single-piece shipment in WorldShip, see ups.com/assets/resources/webcontent/en_US/SinglePieceShipment.pdf (English only).

1. **Specify the receiver's address**.
2. **Select a UPS Service**.
3. **Select a Package Type**.
4. **Specify the bill-to information**.
5. **Type the Weight** of the package.
6. **Click Process Shipment**.

Note: Once you have processed all your packages and shipments, complete the End of Day process.

Processing a shipment with options

1. **Follow steps 1 through 5** under Processing a Single-Piece Shipment.
2. In the Shipping window, **select the Options tab**.
3. **Select the check box** next to the option(s) you wish to apply and complete the additional fields as needed for the option(s).
4. **Click Process Shipment**.

Processing a multiple-piece shipment — single address/consignee (U.S., Puerto Rico and Canada)

1. **Follow steps 1 through 5** under Processing a Single-Piece Shipment.
2. To add another package to the shipment, **click Add** and **type the weight** of the package.
3. To add multiple packages with the same weight, **type the number of packages** in Pkgs. **Click Add**.
4. **Click Process Shipment**.

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Note: If a procedure does not reference a command, the ribbon is minimized in the screen samples. Use the and in the top right corner to maximize and minimize the ribbon.

Shipping

Processing shipments *(Continued)*

Processing larger shipments

For a dedicated guide on processing a single-piece shipment in WorldShip, see ups.com/assets/resources/webcontent/en_US/MultiplePieceShipment.pdf (English only).

For larger shipments to a single consignee from the U.S., Puerto Rico or Canada, follow these steps:

1. **Specify the receiver's address**.
2. **Select a UPS® Service**.
3. **Select a Package Type**.
4. **Specify the bill-to information**.
5. **Select shipment** and **package options** that apply to all packages.
6. On the Home tab, **select Multi-piece Shipment**.

7. In the Multi-piece Shipment window, **type the total number of packages** and **select a package weight option**. If you select Enter Total Shipment Weight, type the total shipment weight in this window. If you select Enter Package Weights on Shipping Window, **type the individual package weights** in the Shipping window. If you select Ground (Freight Pricing) Shipment (Enter the details by commodity), **select commodities and enter the details** following step 8.
8. **Click OK**.
9. If a package option applies to only one package, use the navigation controls to locate the package and then **select the package option**.
10. **Click Process Shipment**.

Multi-piece Shipment ? ✕

Package Weight Options

Total Number of Packages:

⦿ Enter Total Shipment Weight: ____ lb
(All packages must have the same weight and dimensions)

☐ Hundredweight Pricing Applied
(Shipment will not be aggregated at End of Day)

○ Enter Package Weights on Shipping Window

○ Ground (Freight Pricing) Shipment
(Enter the details by commodity)

OK   Cancel   Help

Shipping

Processing international shipments

When you process a package to an international destination, WorldShip can generate the necessary export documentation.

For a dedicated guide on processing Returns in WorldShip, see ups.com/assets/resources/webcontent/en_US/InternationalShipment.pdf (English only).

Processing a package

1. **Specify the receiver's address**.
2. **Select a UPS Service**.
3. **Select a Package Type**.
4. **Specify the bill-to information**.
5. **Type a general description** of the goods and **the weight** of the package.
6. **Select the Customs Documentation tab** to complete the necessary export documentation.
7. **Click Process Shipment**.

Upload customs documentation

Enabling and selecting UPS Paperless® Invoice allows you to upload customs forms created offline instead of attaching hard copies to the shipment. To upload forms, **select the Upload My Forms check box** on the **Customs Documentation tab** and locate the forms to upload after you **click Process Shipment**.

Disabling export documentation

If you currently produce your own export documents, you can disable the export documentation feature in WorldShip by following these steps:

1. On the Tools tab, **select Shipper Editor**.
2. **Click Modify**, then **select the International tab**.
3. **Clear the Enable Invoice** and **Enable CO check boxes**, or **select a filing method** other than UPS file my EEI for me under Electronic Export Information, for the document(s) you do not wish to print.

Automatic Duty and Tax Estimation and HTS Prediction

WorldShip will automatically retrieve an estimate of duties and taxes upon international package processing. As a part of this process, Harmonized Tariff codes will also be predicted for all commodities in the shipment using the Description of Good field. Batch and Distribution List processing methods are also supported. Unless disabled, WorldShip will update and save over any existing HTS codes if a more accurate code is predicted by UPS Brokerage and provide the duties and tax estimates.

If you wish to disable WorldShip from automatically estimating duties and taxes or predicting HTS codes during processing, follow these steps:

1. On the Tools tab, **select Shipper Editor**.
2. **Click Modify**, then **select the International tab**.
3. **Clear the Save/Update Commodities during Shipment Processing** and **Automatic Duty and Tax Estimate during Shipment Processing** check boxes.

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Shipping

Processing international shipments
(Continued)

Disabling Invoice Creation

During shipment processing, you can disable the creation of an invoice by doing the following:

1. In the Shipping window, **select the Customs Documentation tab**.
2. **Clear the Create an Invoice check box**.

Note: *If you disable the invoice creation feature in WorldShip, you should type the customs value for shipments from the U.S. to Canada and Puerto Rico in order to speed up customs clearance.*

Note: *International Shipments whose contents are NOT documents must have three (3) copies of the invoice and any other required export documentation attached to the lead package.*

To electronically file Electronic Export Information (EEI) with the U.S. Census Bureau, you must first register and become an authorized user of the AESDirect Web site. Then follow these steps:

Enabling the AES pre-departure option

1. On the Tools tab, **select Shipper Editor**, **click Modify** and **select the International tab**.
2. Under Electronic Export Information, **select Self-file with AES Direct** (AES option 2) in the Filing Method box, then **click OK**.

Processing an international shipment using the AES pre-departure option

1. **Complete the information** on the Ship To, Service and Options tabs.
2. On the Ship From tab, **type the Tax ID Number** and **select the Tax ID Type**.
3. On the Customs Documentation tab, **select the EEI tab**.
4. **Type the Shipment Reference Number**, or **click Generate SRN** if you want WorldShip to create a unique number in the Shipment Reference Number box.
5. **Type the Internal Transaction Number** assigned to the shipment. This number is required for Air Freight shipments.
6. Complete the remaining fields and **click Submit to AES**.
7. WorldShip provides a link to the AESDirect Web site. Be sure to read the Legal Disclaimer, then **click Submit EEI to AESWebLink**.
8. Complete your submission to the U.S. Census Bureau.
9. After you return to WorldShip, **click Process Shipment**.

For more information, **select WorldShip** on the Support tab and then **UPS WorldShip Help**; type AES.

International Shipper Agreement/Power of Attorney

For U.S. and Puerto Rico Origin Shippers Only:

UPS requires an International Shipper Agreement on file or a Power of Attorney attached to the lead package in some cases. For more information, **select WorldShip on the Support tab** and then **UPS WorldShip Help; type either "International Shipper Agreement" or "Power of Attorney."**

Shipping

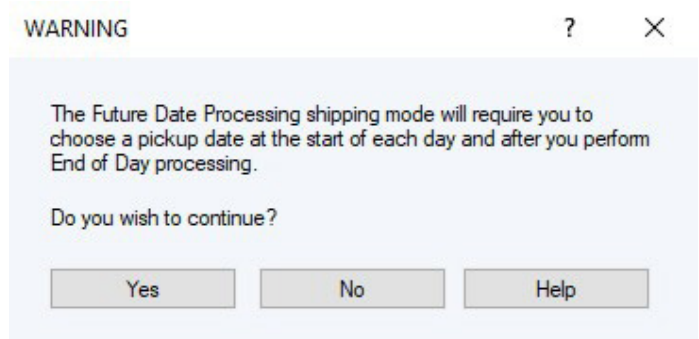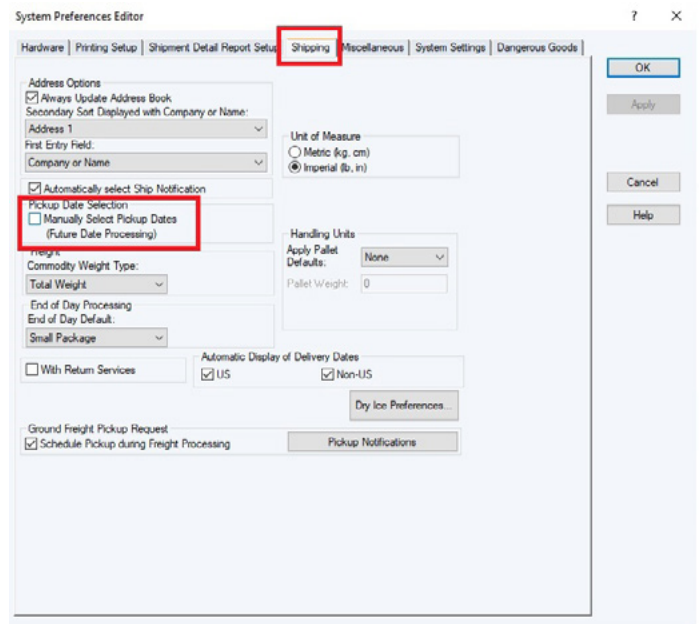## Processing shipments with future pickup dates

With WorldShip Future Date Processing, you can process shipments with a pickup date of up to 183 calendar days in the future.

Activating Future Date Processing

To process shipments with future pickup dates, activate this feature by following these steps:

1. On the Tools tab, **select System Preferences** and then **Shipping**.
2. **Select the Manually Select Pickup Dates check box** under Pickup Date Selection. A warning message asks you to confirm your selection.
3. **Click Yes** and then **OK**.

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Shipping

Processing shipments with future pickup dates *(Continued)*

Selecting an Active Pickup Date

Once you have set this system preference, the Select Active Pickup Date window prompts you to choose a pickup date.

If you want to select today's date as the active pickup date, simply **click OK**. If you want to select a date in the future, **click the down arrow**, **select the pickup date** on the calendar and **click OK**. The active pickup date you select will appear on the title bar at the top of the Shipping and Shipment History windows.

As you process shipments, they will be listed, by active pickup date, under Pending Pickup in the Shipment History window. The letter "A" appears next to the active pickup date.

Note: If you do not require the ability to process shipments with a future date, no action is needed. Your system is already configured to process shipments for the current date.

Changing an Active Pickup Date

To change an active pickup date prior to processing shipments, follow these steps:

1. On the Home tab in the Shipping window, **select Pickup Information** and then **Select Active Pickup Date**.

2. In the Select Active Pickup Date window, **click the down arrow**, **select the pickup date on the calendar** and **click OK**.

3. Process your shipments as usual. They will appear in the Shipment History window under the Pending Pickup group for that active pickup date.

To change a pickup date for shipments that have been processed:

1. In the Shipment History window, **highlight the shipment or Pending Pickup group** for which you want to change the date.

2. On the Home tab, **select Pickup Date** and then **Change Pickup Date**.

3. In the Change Pickup Date window, **click the down arrow**, **select the pickup date on the calendar and click OK**. The shipment(s) appear under the Pending Pickup group for that pickup date.

For more information, **select WorldShip** on the Support tab and then **UPS WorldShip Help**; **type "Future Date Processing Procedures."**

Shipping

Processing returns

UPS offers a comprehensive portfolio of return services to streamline your merchandise return process. Repeat a shipment in the Shipment History as a return or create a new return package in the Shipping window.

For a dedicated guide on processing Returns in WorldShip, see ups.com/assets/resources/webcontent/en_US/ReturnServicesShipment.pdf (English only).

Creating a return

1. **Select a UPS Service** on the Service tab.
2. **Select the Options tab** and then **select Return Services** under Shipment Options.
3. **Select the return service** you want.
4. **Specify the merchandise description** for the package.
5. If you select Electronic Return Label, **click Details** and **specify the Recipient's Email Address**.
6. **Specify the Pickup From address**.
7. **Select the Service tab**, then **select a package type**, **specify the bill-to information** and **type the weight** of the package.
8. **Click Process Shipment**.

    Note: Return Services may be limited in your area. Please visit ups.com for a complete list of valid services.

Processing a forward shipment with a corresponding return shipment

1. **Enter shipping information**.
2. **Select the With Return Services check box** on the Service tab.
3. **Click Process Shipment**. The forward shipment label prints, and the Shipping window automatically fills in the address for the corresponding return shipment.
4. **Select the Options tab**. The Return Services option will be checked. **Select the return service** you want and **enter a merchandise description**.
5. **Click Process Shipment**.

    Note: To set a preference for the With Return Services check box, go to the Shipping tab in the System Preferences Editor.

Shipping

Editing packages and shipments

WorldShip allows you to edit packages and shipments you have already processed, but for which you have not yet run the End of Day process.

Editing a Package or Shipment

1. Under UPS Pickups in the Shipment History window, **select the individual package** or **shipment** you wish to edit.

2. On the Home tab, **select Edit/Reconcile**. Confirm which package/shipment you need to edit and then make the appropriate changes.

3. **Click Process Shipment**. (You will be prompted to replace the previously printed label with the regenerated label.)

Deleting a single package in a multiple-piece shipment

1. Under UPS Pickups in the Shipment History window, **select the shipment containing the package** you wish to delete.

2. On the Home tab, **select Edit/Reconcile**. Confirm which package/shipment you need to edit.

3. Using the navigation arrows next to Process Shipment, **display the package** you wish to delete.

4. **Click Delete Pkg**. Confirm that you want to delete the package.

5. **Click Process Shipment**. (You will be prompted to replace the previously printed label with the regenerated label.)

   U.S. Only: *For billing problems, call our Billing Department at 1-800-811-1648 and provide the tracking number(s) and pickup record number(s).*

Shipping

Processing freight shipments

About Ground Freight shipments

Ground Freight is a general service offering for regional, interregional and long-haul services as well as a full portfolio of specialty solutions in the U.S. (including Alaska and Hawaii), Canada, Puerto Rico, Guam, the U.S. Virgin Islands and Mexico. For a dedicated guide on processing freight in WorldShip, see this document ups.com/assets/resources/webcontent/en_US/ground_freight.pdf.

About Air Freight shipments

Air Freight is a general service offering for regional, interregional and international services as well as a full portfolio of specialty solutions worldwide. For a dedicated guide on processing air freight in WorldShip, see this document ups.com/assets/resources/webcontent/en_US/air_freight_shipment.pdf.

Processing a freight shipment

1. **Select the Freight check box**, and either an **Air** or a **Ground Freight UPS service** on the Service tab. The remaining fields change depending on the UPS service you select.

2. **Specify the Ship To address**.

3. **Specify the Ship From address**.

4. **Specify the shipment-level** and **option details**, such as bill-to information, commodity information, shipping options, shipment dimensions, shipment description, shipment reference numbers and a packing list. See "Entering commodity information" on the next page.

5. For an international shipment, **record the export document and goods details**.

6. Decide if you want to complete your shipment now or later.
   - If you have not completed your shipment, you can save it as a draft by **clicking Save** (in the lower right corner). The shipment will be saved in Shipment History as a "Draft" with the date when it was saved. If you created a Packing List for the draft shipment, it will not be saved. When you are ready to continue work on it, **select it on the Shipment History window** and **click Edit/Reconcile Shipment** on the Home tab.
   - If you have completed your shipment, **click Process**.

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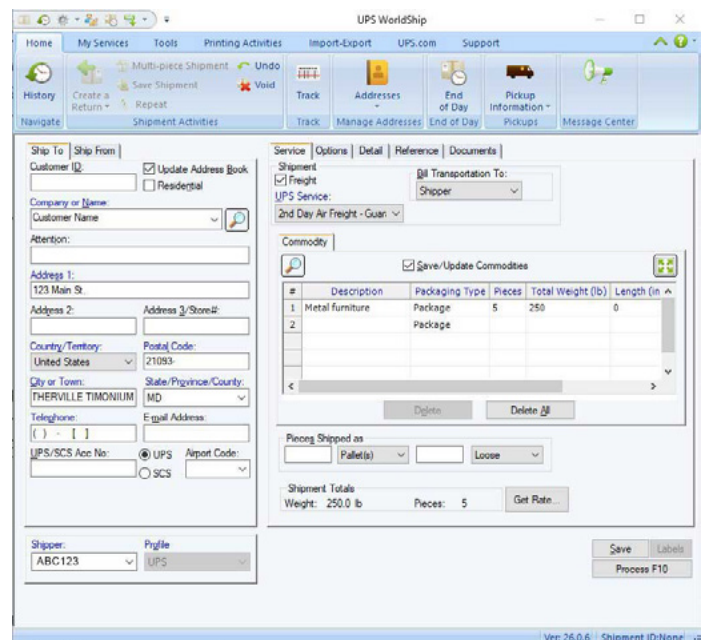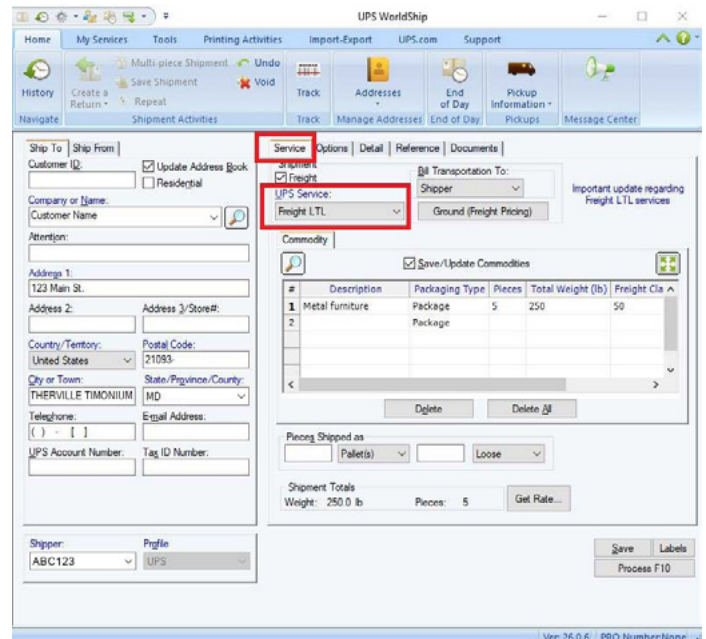
Note: *You can set a shipper setting to print a specific number of labels per handling unit and loose item. On the Tools tab, select Shipper Editor, highlight shipper information and then click Modify. Select the Freight tab and then enter the number of labels to print per handling unit and per loose item.*

Shipping

Processing freight shipments *(Continued)*

Entering commodity information

1. **Enter information** about each line item of your shipment in the Commodity section on the Service tab. The commodity list on the Service tab shows each item that was added to the current shipment.

2. **Click Add** to add each item to the commodity list, or if necessary, **click Clear** to clear items in the commodity list. There is no limit to the number of commodities that can be selected or added to the shipment. The limit will be taken care of during shipment processing.

   Note: As an alternative to manually adding commodities to the commodity list, click Commodity Search and use the Commodity Search window to access commodities entered previously in the Commodity Editor. This search is useful when entering many commodities in a shipment.

Requesting freight rates

To request the shipment rate for the current shipment:

1. **Click Get Rate**. The Shipment Rates window appears.

2. Review the detailed rate information.

3. **Click OK**.

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Shipping

Processing freight shipments *(Continued)*

Scheduling a pickup of a single Ground Freight shipment

WorldShip allows you to schedule a Ground Freight Pickup after processing a shipment by **selecting History**, then **Freight Pickup** and then **Ground Freight Pickup Request**.

Note: You can also schedule a pickup request during shipment processing if you set a system preference. On the Tools tab, select System Preferences and then Shipping; select the Schedule Pickup during Freight Processing check box.

1. In the Shipping window, **complete the Ship To information, Shipment section** and **Commodity section**.

2. **Click Process**. The Pickup Request window displays.

3. The Pickup Location displays the Ship From address.

4. **Enter any additional instructions** for your shipment.

5. **Enter the Pickup Date, Pickup Ready Time** and **Pickup Location Closing Time**. Otherwise, the information is defaulted to the current time and date.

6. **Enter the number** of Handling Units.

7. **Click OK**.

Scheduling a pickup of multiple Ground Freight shipments

For a single pickup request, you can select multiple ground freight shipments by performing the following steps:

1. **Click the shipment associated** with the Ground Freight icon in the Shipment History window.

2. On the Home tab, **select Freight Pickup** and then **Freight Pickup List**. The Freight Pickup List window appears.

3. **Click Add** to enter the Ground Freight item to the list. The Ground Freight item must have a Pro number in order for this process to work.

4. To enter more items, **repeat steps 1 and 3** until you have the desired items in your Freight Pickup List.

5. **Click Schedule Pickup**.

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Shipping

Processing freight shipments *(Continued)*

Scheduling a pickup or drop off of an Air Freight shipment

To automatically schedule a drop off during shipment processing for a HouseAccount Air Freight shipper:

1. **Select the Drop Off check box** on the Service tab.

2. Process the shipment as usual. When you **click Process**, the Drop Off Request window appears.

3. In the Drop Off Request window:
    - Under Pieces Shipped As, **describe the handling units**.
    - Under Drop Off, **select a drop-off date** and a **drop-off time**.
   - **Click OK**.

To automatically schedule a pickup or drop off during shipment processing for an Occasional Air Freight shipper:

1. **Enter the shipment** as usual. When you **click Process**, the Pickup/Drop Off Request window appears.

2. In the Pickup/Drop Off Request window:
    - Under Pieces Shipped As, **describe the handling units**.
    - Under Pickup/Drop Off, **select either Pickup** or **Drop Off**.

    Note: Your choice determines the remaining active and inactive fields in this window.

    - Under Drop Off**, select a drop-off date** and a **drop-off time**.
    - Under Requestor, **provide the appropriate information** or **use the Ship From information** provided.
    - **Provide the pickup date, pickup ready time, and pickup location closing time**.
    - Under Pickup Location, **provide any additional instructions**.
    Note: All other fields show the Ship From address and cannot be updated.
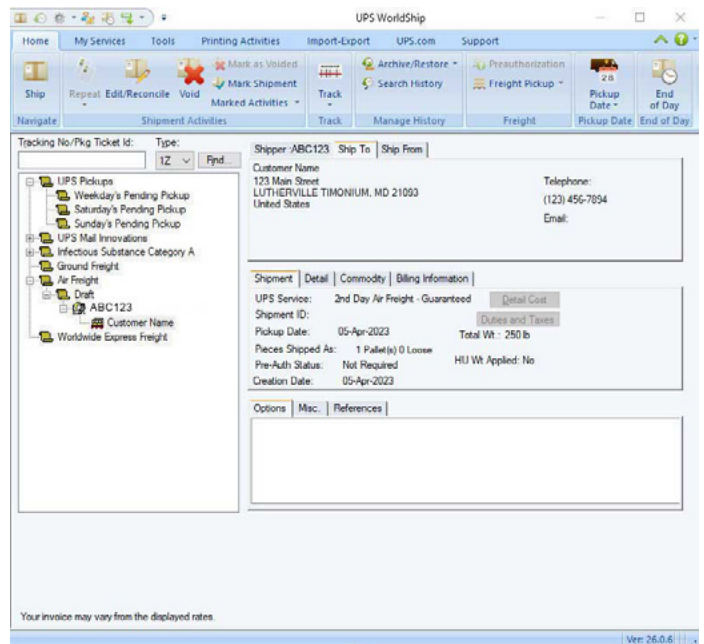   - **Click OK**.

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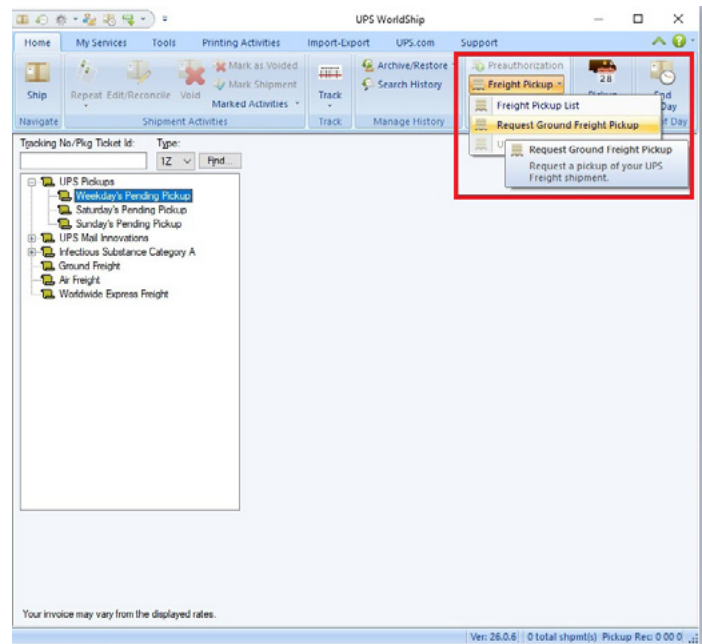
Shipping

Processing freight shipments *(Continued)*

Viewing your freight shipment(s) in Shipment History

To view your freight shipment(s), **select the Shipment History window**.

An icon ▦ represents a freight shipment for a specific shipper.

Profiles

Profile Editor

Use the Profile Editor to add, delete or modify a profile, which is a saved collection of predefined preferences, including various service options, package options, shipment options and reference numbers. Then you can assign the profile to one or more shippers.
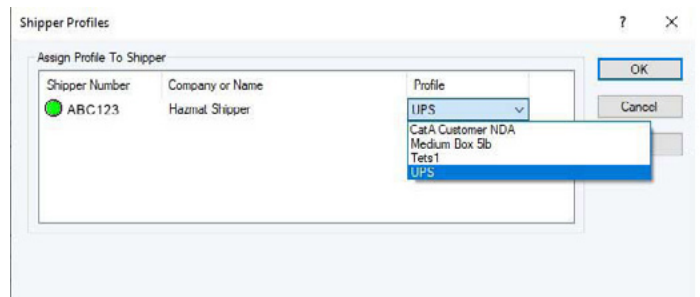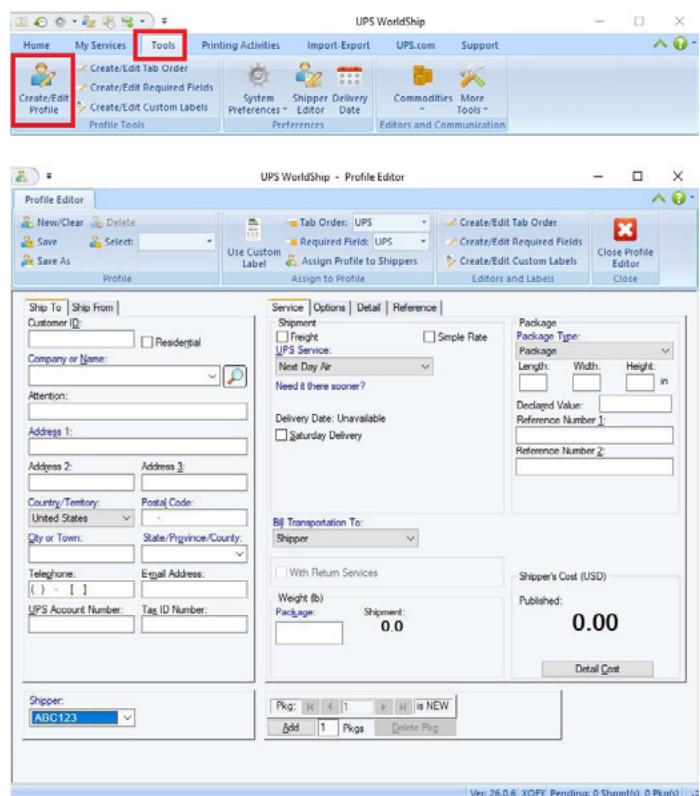
Adding a profile

1. On the Tools tab, **select Create/Edit Profile**.
2. In the Profile Editor Welcome window, **click OK**.
3. **Fill in or select the preferred values for the fields** shown on all the tabs. Your choices appear as the defaults in the corresponding fields in the Shipping window.
4. In the ribbon, **click Save**.
5. In the Profile Save As window, **type a unique name**, up to 35 characters, and **click OK**.

   Note: If you want to base a new profile on an existing profile, select the existing profile name, modify the fields, and in the ribbon, click Save As. In the Profile Save As window, type a unique name, up to 35 characters, and then click OK.

Assigning a profile to a shipper

1. On the Tools tab, **select Create/Edit Profile**.
2. In the Profile Editor ribbon, **click Assign Profile to Shippers**.
3. In the Shipper Profiles window:
   - To assign a profile to a specific shipper, **select the desired profile** for that shipper in Profile next to the shipper number.
   - To assign a particular profile to all shippers, **select the desired profile** in Assign Profile To All Shippers and **click Assign**.
4. **Click OK** and then **click Close Profile Editor**.

Profiles

Assigning a profile to a customer in the address book

1. On the Home tab, **select Addresses** and then **Address Book**. The Address Book Editor window appears.

2. Type information about a new customer or **click the Search icon** 🔍 next to the Company or Name box to search for a customer in your address book. In the Address Book Search window, **locate and select an existing customer** and then **click Select**.

3. **Select a profile name** in Profile.

4. **Click Add New Address** for a new customer or **click Modify Address** for an existing customer.

5. When you are finished, **click Close**.

   Note: You can also assign a profile using the Shipper Editor or you can select the profile from the Shipping window.

Reports

Printing reports

Each time you complete the End of Day process, the following reports may print automatically:

Daily Shipment Detail Report

Summarizes all the packages processed since your last End of Day process and lists the recipient and shipping information for each package as well as summary totals. Using the System Preferences Editor, Shipment Detail Report Setup tab, you can choose whether to print this report automatically when you run End of Day.

High Value Report

Automatically prints during the End of Day process only if you processed a package with a Declared Value exceeding a certain threshold and during shipment processing for Return Services shipments. In addition, this report shows the tracking number, package ID, reference number and Declared Value of each high value package.

Important: Be sure to give this report to your UPS driver when he or she picks up the high value packages. The UPS driver signs the report and records the pickup time and the total number of high value packages on the last line of this report. Since these pickup details are on the report the driver takes with the packages, make a copy of the driver's report with the pickup details if you want pickup confirmation for your records. Since pickup details include driver's signature and handwritten information, it cannot be reprinted.

UPS Driver Transmission Control (non-U.S./Puerto Rico/Canada Origins)

Automatically prints during the End of Day process and during close out of Trade Direct consolidated movements only if the destination is other than the U.S. or Puerto Rico. This report verifies the successful transmission of shipment data to UPS during the close-out process.

Important: Be sure to give this report to your UPS driver when he or she picks up the packages.

Pickup Summary Barcode Report (U.S./Puerto Rico/Canada Origins)/UPS® Manifest Summary (non-U.S./Puerto Rico/Canada Origins)

The Pickup Summary Barcode Report automatically prints during the End of Day process, and the UPS Manifest Summary automatically prints during the End of Day process and during close out of consolidated movements. Both reports summarize shipment information about the packages your UPS driver is to pick up. This report includes:

- Your account information.
- A barcode that includes your account number, a unique shipping record identifier and the total number of packages to be picked up.
- Summary information so the UPS driver can verify what is to be picked up.
- An area to record the name of the UPS driver who picks up the packages, the pickup time and the total number of packages picked up by the driver.

Important: Be sure to give the Pickup Summary Barcode Report to your UPS driver when he or she picks up the packages. The UPS driver scans the barcode on the report. Then the UPS driver signs the report and records the pickup time and the total number of packages on the bottom of the report. Since the UPS driver scans this report but does not take it, you may keep the report for your records.

UPS Manifest Detail (non-U.S./Puerto Rico/Canada Origins)

Automatically prints during the End of Day process if the transmission of your shipment data to UPS fails. This report details shipment information about the packages your UPS driver is to pick up.

Important: Be sure to give this report to your UPS driver when he or she picks up your packages.
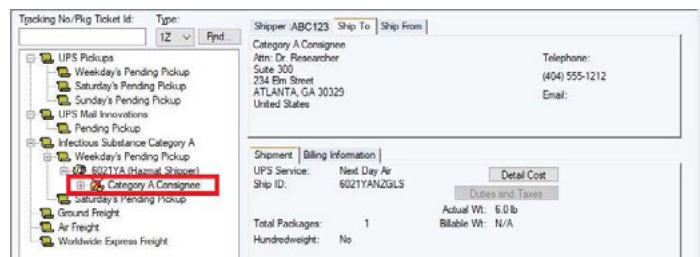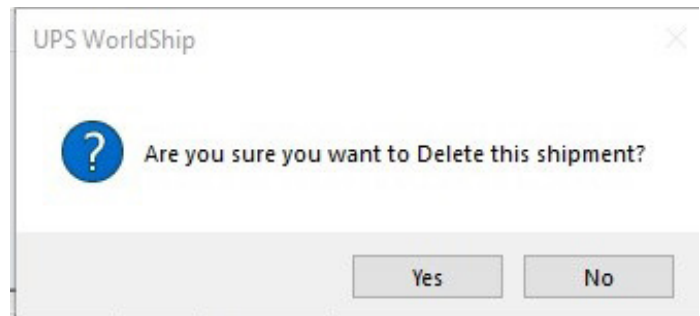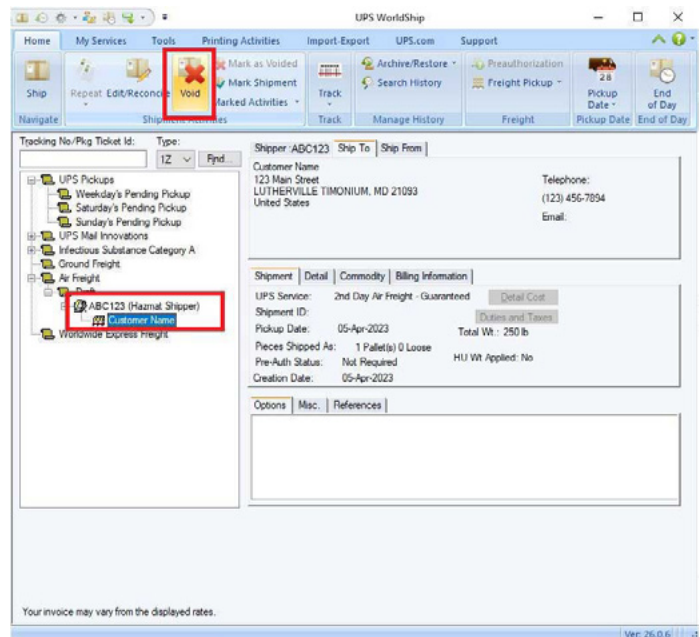
Voiding Packages or Shipments

Voiding a shipment from the Shipping window

WorldShip allows you to void shipments you have already processed but for which you have not run the End of Day process (see below). You can also void packages or shipments after you have run the End of Day process.

1. On the Home tab in the Shipping window, **select Void** to void or delete a package or shipment.

2. Read the instructions on how to void a shipment and **click OK**. The Shipment History window appears and the last shipment you processed is highlighted.

3. Confirm the correct shipment is highlighted. Select another shipment if needed.

4. If the shipment icon shows an up arrow ⌃ you will need to void the shipment using the Void Shipments Page on the web. On the Home tab, **click Void**.

   ■ WorldShip will prompt you to use the Void Shipments Page on the web.

   Note: Icons with an up arrow ⌃ indicate that some package detail information has already been sent to UPS.

5. If the shipment icon does not have an up arrow:

   ■ On the Home tab, **select Void**. A confirmation message displays.

   ■ **Click Yes**. A Void icon appears next to the shipment/packages.

   Note: If the package you are attempting to void has already gone through the End of Day process and the void portal supports voids for your country, you will be taken to the U.S. Void a Shipment application on ups.com (English only). See Voiding a package or shipment from the Shipment History window after End of Day below.

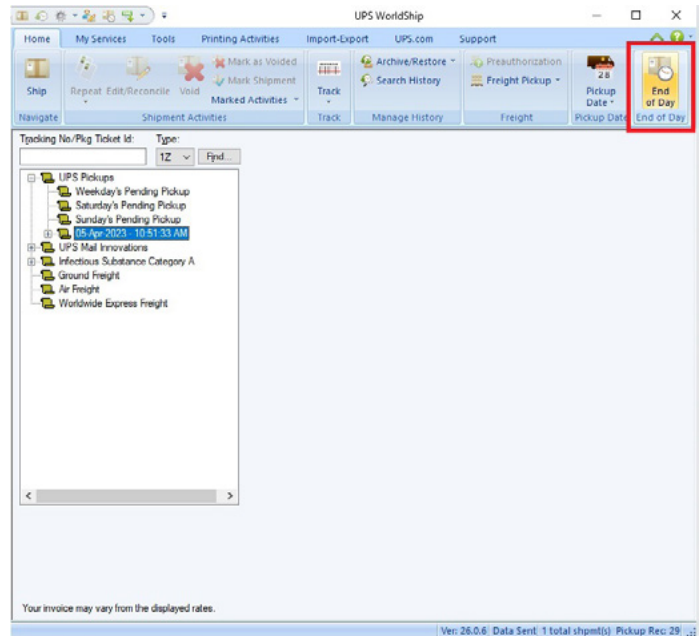# Voiding Packages or Shipments

Voiding a package or shipment from the Shipment History window after End of Day

1. In the Shipment History window, **highlight the tracking number** of the package you want to void.
2. On the Home tab, **select Void**.
3. **Click OK**. The UPS Void Shipments Page appears for you to complete the void.
4. When you are finished voiding the shipment, return to WorldShip.

Voiding Packages or Shipments

Marking a package or shipment as voided in the Shipment History window

When you void a package or shipment from the UPS Void Shipments Page, WorldShip will not automatically update the Shipment History window to indicate you completed the void, but you can mark the package or shipment as voided. Since the actual status of the package or shipment will not change, you should complete the steps necessary to void the shipment or package on the UPS Void Shipments Page before using this procedure.

1. In the Shipment History window, **highlight the package or shipment** you voided from the UPS Void Shipments Page.

2. On the Home tab, **select Mark Shipment**. A check mark icon appears next to the shipment or package.

3. On the Home tab, **select Marked Activities** and then **Void Marked Shipments**. An icon ❌ appears next to the shipment or package.
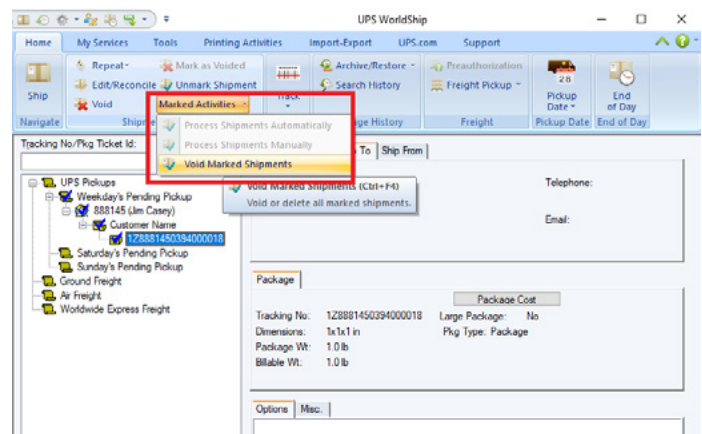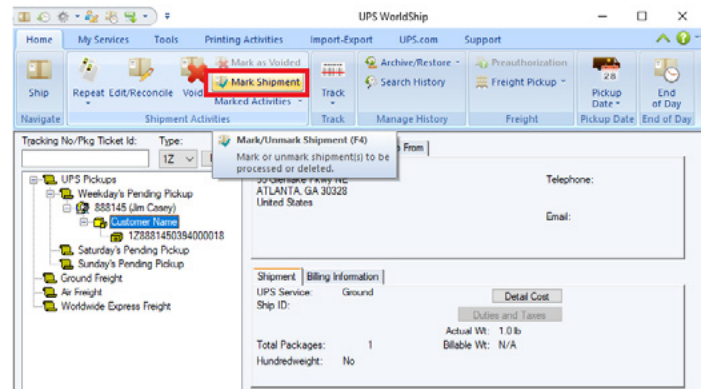
End of Day

Completing the process

WorldShip electronically transmits your shipment detail to UPS. Separate End of Day processes can be completed for the same pickup day.

Once you have finished processing packages for a Pending Pickup group, complete the End of Day process. These steps should be completed prior to the time of pickup.

Completing the End of Day process

1. **Select the Pending Pickup group** in the Shipment History window.

2. On the Home tab, **select End of Day**.

3. Confirm you wish to proceed. WorldShip will print the End of Day reports. For more information, see Printing reports on page 17.

4. If Future Date Processing has been activated, the Select Active Pickup window appears. **Click the down arrow** to select the active pickup date from the calendar (up to 183 days in the future). **Click OK**.

5. Provide applicable reports to your UPS driver. For more information, see Printing reports on page 17.

Additional Resources:

For more information about the End of Day process, see our dedicated guides (English only):

- Run End of Day ups.com/assets/resources/webcontent/en_US/RunEndofDay.pdf

- End of Day Button is inactive ups.com/assets/resources/webcontent/en_US/EndofDayButtonInactive.pdf

- Verify Your Data is sent to UPS ups.com/assets/resources/webcontent/en_US/VerifyEODData.pdf

- Void a Shipment Before End of Day ups.com/assets/resources/webcontent/en_US/VoidShipBeforeEOD.pdf

- Void a Shipment After End of Day ups.com/assets/resources/webcontent/en_US/VoidShipAfterEOD.pdf
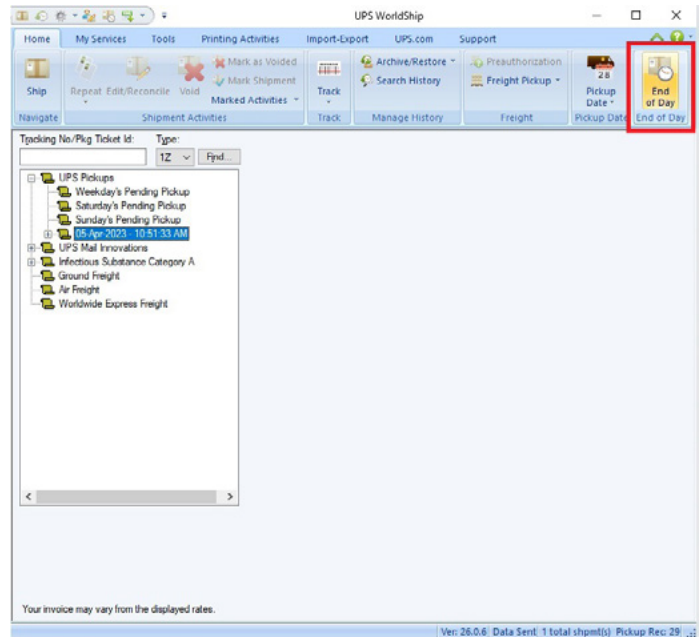
Validating, Classifying and Reconciling Addresses

Validating your address data

Address validation will help you determine if a U.S. 50 address is valid.

There are three types of address validation in WorldShip:

- **Single address, city, state** and **ZIP Code™** validation that occurs automatically when shipping a package. WorldShip will suggest alternates if an address appears to be incorrect.

- **Single street level address validation** validates not only the city, state and ZIP Code, but the street address as well. To select this address validation option, **press F8** in the Shipping window or on the Home tab, **select Addresses** and then **Validate Ship To Address**. WorldShip will quickly check the address and return alternate suggestions if the address is believed to be incorrect or tell you if the address is valid. This process includes ZIP+4 assignments to your address data.

- **Address Book Validation** validates the street, city, state and ZIP Code of every address in the WorldShip address book. To select this address validation option, **press Shift and F9** or on the Home tab, **select Addresses** and **then Address Book**. In the Address Book Editor, **click Send Addresses for Validation**. WorldShip collects all of the Address Book entries, validates them and then downloads them to your PC for reconciliation. This process also includes ZIP+4 assignments to your address data.

Note: To validate a single address in the Address Book Editor, enter or select the address information and click Validate Address.

For step-by-step instructions, **select WorldShip** on the Support tab and then **UPS WorldShip Help**; **type "Validate Addresses."**

Validating, Classifying and Reconciling Addresses

Classifying your address data

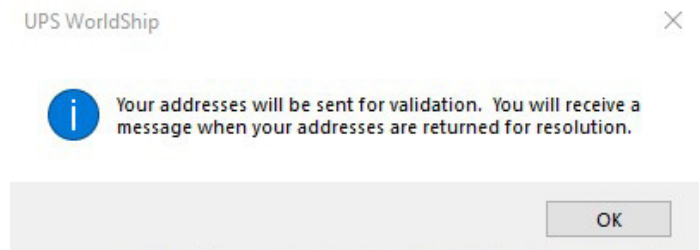Address classification will help you determine if a U.S. 50 or Canada address is residential or commercial.

There are two types of address classification in WorldShip:

■ **Single level address classification** classifies the current address. To select this address classification option, **press F7** in the Shipping window or on the Home tab, **select Addresses** and then **Classify Ship To Address**. WorldShip classifies the address shown on the Ship To tab.

■ **Address Book Classification** classifies all addresses in the WorldShip address book. To select this address classification option, **press Shift and F9** or on the Home tab, **select Addresses** and then **Address Book**. In the Address Book Editor, **click Send Addresses for Classification**. WorldShip collects all of the Address Book entries, classifies them and then downloads them to your PC.

For step-by-step instructions, **select WorldShip** on the Support tab and then **UPS WorldShip Help**; **type** "**Classify Addresses**."

Reconciling your address data

Use the Reconciliation feature to select the best address from a list of possible candidates.

For step-by-step instructions, **select WorldShip** on the Support tab and then **UPS WorldShip Help**; **type** "**Reconcile Addresses**."

History and Tracking

Finding shipments

1. To find a shipment that you have processed in the past, **select Search History** on the Home tab or **click Find** in the Shipment History window.

2. Fill in the appropriate information you need to find the shipment you are looking for, then **click Find**.

For more information about how to find shipments, **select WorldShip** on the Support tab and then **UPS WorldShip Help**; **type "Find a Shipment**."
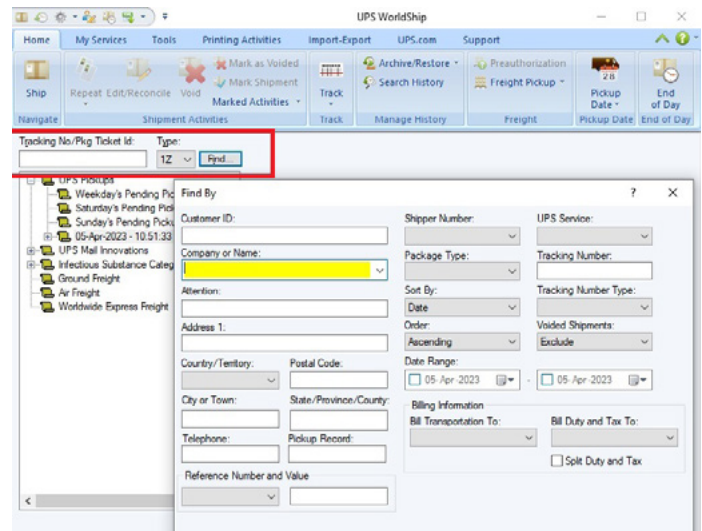
History and Tracking

Tracking packages or shipments

Tracking from the Shipment History window

1. To track a single package from the Shipment History window, **select a package** by highlighting the tracking number. On the Home tab, **select Track** and then **Track This Package**.

2. To track multiple packages from the Shipment History window:

· ■ **Highlight a date** to track all packages shipped on a specific date or **highlight a shipment** to track all packages in a shipment.

· ■ On the Home tab, **select Track** and then **Track Multiple**. In the Tracking Number Manager window, on the 1Z tab, **click Add**, then **Track List**.

   ■ *Note: You can track packages for multiple dates and shipments by highlighting the specific date or shipment and continuing to click Add.*

3. WorldShip connects you directly to the Tracking Page on <u>ups.com</u> and displays package information.

4. If desired, **print the tracking information**.

5. **Close the Tracking Page window** to return to WorldShip.

Tracking from the UPS® Web site

1. On the <u>ups.com</u> tab, **select UPS Tracking**. WorldShip connects you directly to the Tracking Page on the UPS Web site.

2. **Type your UPS tracking numbers** on the Track Packages & Freight tab and **click Track**.

3. Follow the instructions.

4. **Close the Tracking Page window** to return to WorldShip.

Billing and Rating Features

Fuel surcharge

UPS fuel surcharges are automatically included in the rate displayed for each shipment. The surcharges potentially can change from month to month. A software update will be provided to you automatically.

For more detailed information on the UPS Fuel Surcharge, **go to** ups.com or **select WorldShip** on the Support tab and then **UPS WorldShip Help**; **type "Fuel Surcharge**."

Selecting bill-to information

Use the bill-to fields to indicate who pays for the transportation, duty and tax charges to ship a package, shipment or movement. These fields appear in several windows, including the Service tab in the Shipping window. The bill-to fields include:

Bill Transportation To includes Shipper, Receiver, Third Party or Consignee Billed options to indicate who pays the transportation cost to ship the package, shipment or movement.

Bill Duty and Tax To includes Shipper, Receiver or Third Party options to indicate who pays the duty and tax costs to ship the package, shipment or movement.

Split Duty and Tax check box indicates if you want the transportation payer instead of the tax payer to pay the duty cost to ship the package, shipment or movement. If you select this check box, the Bill Transportation To title changes to Bill Transportation and Duty To, and the Bill Duty and Tax To title changes to Bill Tax To. To reverse this selection, **clear the Split Duty and Tax check box**. A confirmation message appears each time you select or clear this check box.

Billing and Rating Features

Third party billing

For more information on third party billing in WorldShip, see our detailed guide: ups.com/assets/resources/webcontent/en_US/ThirdPartyBilling.pdf (English only).

1. Process shipments as outlined on page 2 of this guide. Here are the steps:
   - **Specify the receiver's address**.
   - **Select a UPS Service**.
   - **Select a package type**.
   - **Select Third Party** in Bill Transportation To and the Third Party Address window appears.
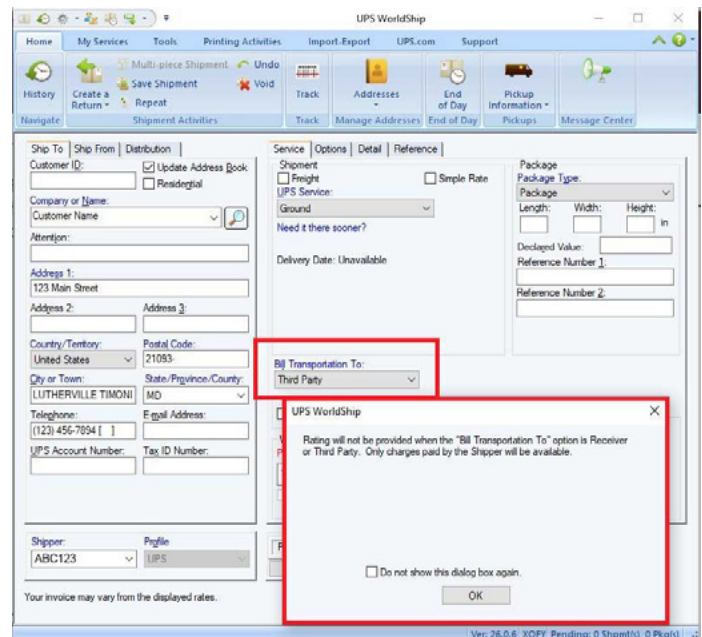
2. In the Third Party Address window, **type the address and account numbe**r of the person or company that will pay all of the charges that the shipper would pay for the current shipment. Then **click OK**.

3. In the Shipping window, **type the weight** of the package and **click Process Shipment**.

Additional Features and Functionality

Quick Commands

The Quick Commands Editor allows you to select from a predefined list of commands and configure those commands for use on the **Import/Export tab**. See Creating the Quick Commands List below.

Creating the Quick Commands List

1. On the Import/Export tab, **select Create New**.
2. In the Quick Commands Editor window, **create a list of commands** for the Quick Commands list:
   - To add a command, **select the command** in the Available Commands box and **click Add**. The command is added to the Selected Commands box.
   - To remove a command, **select the command** in the Selected Commands box and **click Remove**.
   - To remove all commands, **click Remove All**.
3. Edit the selected command as follows:
   - If you added a command that can be added more than once, the Quick Commands Editor window appears so you can configure the selected command. See Modifying Quick Commands on page 29.
   - If you added a command that can be added only once, continue with step 4.

   Tip: If you want to change the defaults for the selected command, click Edit. See Modifying Quick Commands.
4. Arrange the commands on the Quick Commands list in the desired order:
   - To move a command up, **select the command** and **click Move Up**.
   - To move a command down, **select the command** and **click Move Down**.
5. To view and use the Quick Commands list, on the Import/Export tab, **select a command** on the Quick Commands list.
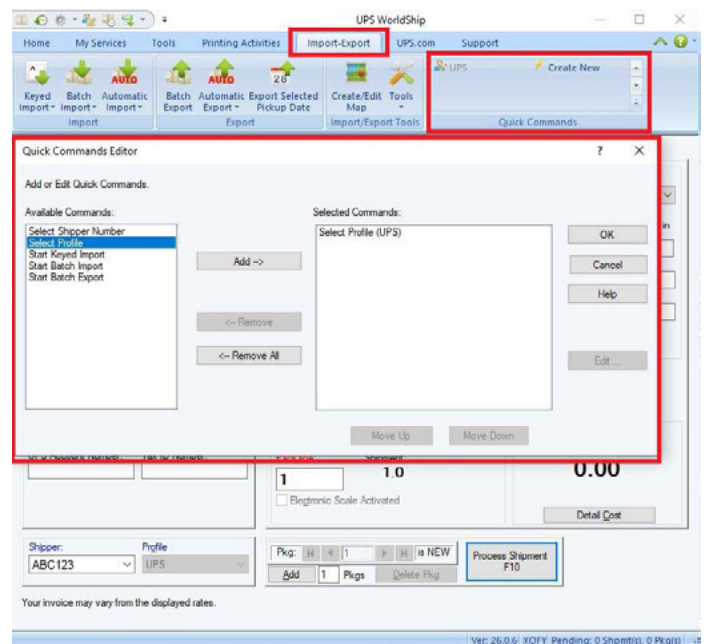
Additional Features and Functionality

Modifying Quick Commands

1. On the Import/Export tab, **select Create New**.
2. In the Quick Commands Editor window, **add a new command**:

   - **Select the command** in the Available Commands box.
   - **Click Add**.

   If you added a command that can be added more than once, the Quick Commands Editor window appears and shows information for the selected command. The name of the command appears in the title bar. Skip to step 4.

   If you added a command that can be added only once, the name of the command appears in the Selected Commands box. If you want to edit the command, continue with step 3; otherwise, skip to step 7.

3. To edit an existing command on the Quick Commands list:

   - **Select the command** in the Available Commands box.
   - **Click Edit**.

   The Quick Commands Editor window appears and shows information for the selected command. The name of the command appears in the title bar.

   To edit a command that can be added more than once, continue with step 4; otherwise, skip to step 5.

4. Complete the appropriate action:

   - For Shipper Number, **click the down arrow** in the Select Shipper Number box and **select a shipper number**.
   - For Profile, **click the down arrow** in the Select Profile box and **select a profile**.
   - For Start Keyed Import, **select a map name** in the Start Keyed Import box.
   - For Batch Import, **select a map name** in the Start Batch Import box.
   - For Batch Export, **select a map name** in the Start Batch Export box.

5. To add a tooltip for the command, **type up to 80 characters** in the Tooltip Text box or **use the predefined tooltip**.
6. **Click OK**.
7. **Repeat this procedure** as needed or **click OK**.

Additional Features and Functionality

Error labels printed during Batch Processing

WorldShip now prints error labels by default for each package whose shipment fails validation during Batch Processing. The Label identifies the error with the information needed to correct the package for processing and serves as a placeholder to maintain the proper order of labels to packages. The Print Error Label during Batch Processing option is located under Preferred Label Printing on the Printing Setup tab in the System Preferences Editor window.

Custom labels

The Custom Label Editor allows you to create, save, edit and delete multiple templates for custom labels. Custom labels can include an image, a promotional message, text, shipment fields, or a combination of these items. To specify which custom label template to use, **assign the labels to print** when using a profile or **add a button** to the custom toolbar. For more information, see our detailed guide: ups.com/assets/resources/webcontent/en_US/CustomLabelHowTo.pdf (English only).

Selecting label stock

Ensure that the correct label stock is loaded into your label printer. The required label stock varies by the type of custom label template used, as follows:

- A Shipment Label Header template allows you to customize the top two-inch extended area of the following label stock dimensions: Thermal 4 x 8 or 4 x 8 ¼ inches, Laser 8 ½ x 11 inches (1 Label per Page), Laser 8 ½ x 11 inches (2 Labels per Page), and Laser A4 210 x 297 mm.

- A Doc Label template allows you to customize the lower two-inch area of the following label stock dimensions: Thermal 4 x 8 or 4 x 8 ¼ inches (Perforated).

- A Consignee Label template allows you to customize any portion of the consignee label (an additional label that does not replace the shipment label) on the following label stock dimensions: 4 x 8 or 4 x 6 inches.

Additional Features and Functionality

Creating or editing a custom label template

1. On the Tools tab, **select Create/Edit Custom Labels**. The Custom Label Editor window appears.

2. If you want to edit an existing template:
   - Under Existing Templates, **select the template** that you want to edit.
   - **Click Edit**. The Edit Template window appears.

   Note: You cannot edit or delete the UPS Sample templates. You can copy and edit a UPS Sample template. See step 3.

   Skip to step 6.

3. If you want to create a template based on an existing template, such as a UPS Sample template:
   - Under Existing Templates, **select the template** on which you want to base the template.
   - **Click Copy**. The Copy Template window appears.
   - **Enter a template name** up to 50 characters in the Enter the Name of the New Template box and **click OK**. The Edit Template window appears.
   - Skip to step 6.

4. If you want to delete an existing template:
   - Under Existing Templates, **select the template** that you want to delete.
   - **Click Delete**. A message asks you to confirm the deletion.
   - **Click Yes**. The Custom Label Editor window appears.
   - Skip to step 11.

5. If you want to create a new template:
   - Under New Template, **click the down arrow** in the Template Type box and **select a type of label**.
   - **Type a name** up to 50 characters for the new template in the Template Name box.
   - **Click Create**. The Edit Template window appears.

(Continued on the next page)
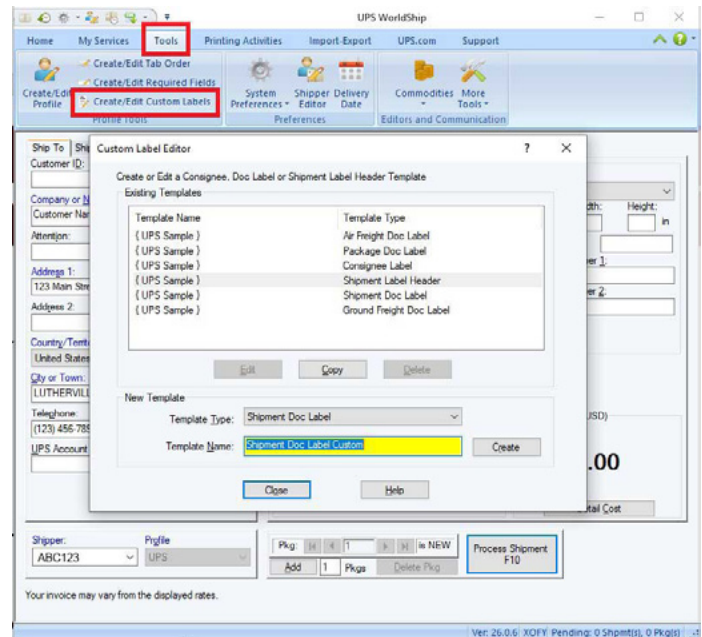
Additional Features and Functionality

Creating or editing a custom label template *(Continued)*

6. Add each element to the canvas using one of the following add options:

    Note: Sort the WorldShip fields alphabetically by clicking the Field column label.

    ◾ **Add a Field** — **Click the down arrow** in the WorldShip Fields box and **select a field category**. Using the field list under the field category, **select a field**, and then **drag and drop the field** to the desired location on the canvas to place the field.

    ◾ **Add Custom Text** — **Type the text** up to 45 characters in the Custom Text box, **click Add Text**, and **click the desired location** on the canvas to place the text.

    ◾ **Add a Field without Text** — **Select the Add Data Field Only check box**.

    ◾ **Add Test Data** — **Select the Display Test Data check box** to pre-populate the field with test data.

    ◾ **Add an Image to the Canvas** — **Select an image** under Image Library and drag and drop the image to the desired location on the canvas to place the image.

    ◾ **Add an Image to the Image Library** — **Click Add Library Image**. In the Add Image window, **supply the path** to the image or **click Browse** and browse to and select the image. Then **click OK**. The image is saved in the Image Library.

    ◾ **Add a Horizontal Line** — **Click Add Line** under Template, **click and hold** the left mouse button to indicate the beginning of the line on the canvas, **drag the line** to its end, and **release the left mouse button**.

(Continued on the next page)
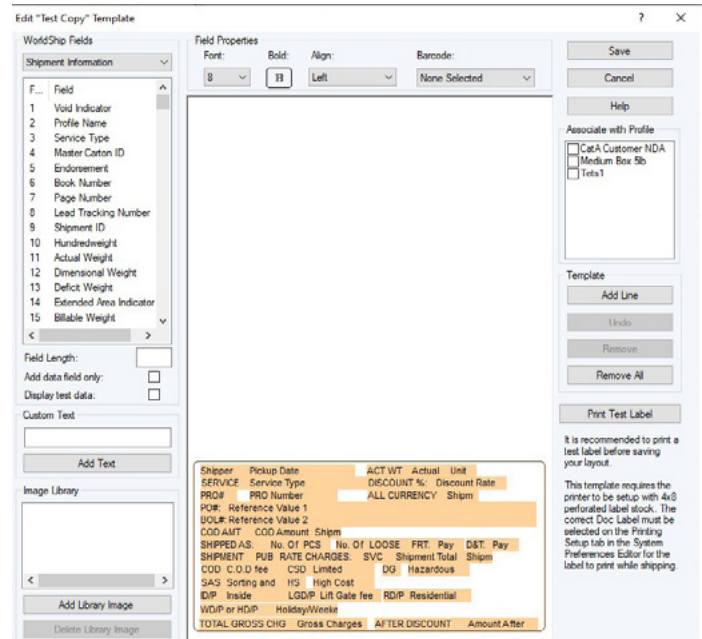
Additional Features and Functionality

Creating or editing a custom label template *(Continued)*

7. Modify the properties of the fields and text placed on the canvas as needed:
    - **Select the item** on the canvas.
    - Under Field Properties, **change the font and alignment, make the text bold**, or **define a barcode**.
    - Under the WorldShip fields list, **change the field length**.
    - **Click Modify**.

8. Remove field(s) on the canvas as follows:
    - To remove one field, **select the field** on the canvas and **click Remove**. A message asks you to confirm the deletion. **Click Yes**, and the field is removed from the canvas.
    - To remove all fields, **click Remove All**. A message asks you to confirm the deletion. **Click Yes**, and all fields are removed from the canvas.

9. To test the custom label, **click Print Test Label**. The label prints using the current label printer selection in system preferences.

10. To assign the custom label template to a profile, **select the appropriate profile check box** under Associate with Profile. The saved custom label template is used for all shipments processed using the selected profile.

    Note: You can also assign a custom label to a profile by clicking Select Custom Label in the Profile Editor window.

11. **Click OK**.

Custom label printing setup

1. On the Tools tab, **select Systems Preferences Editor** and then the **Printing Setup tab**.

2. **Highlight the appropriate label printer** in the Printer grid and **click Printer Setup**.

3. In the Label Printer Setup window, ensure that the correct label configuration is selected. Update the Label Stock Dimensions and Extended Area Usage boxes as needed for the intended label type.

4. **Click Apply**.

5. On the Printing Setup tab, **select the appropriate check boxes** as needed to indicate a Doc or Consignee label.

6. **Click Update** and **OK**.

Dangerous Goods Shipments

About Dangerous Goods

Dangerous Goods is a contract service. After upgrading, on the Tools tab, **select System Preferences** and then **Dangerous Goods**. You should configure the default settings for the Chemical Record data source and the printing of Dangerous Goods documentation. WorldShip will import Chemical Records from an existing external data source or a WorldShip data source.

For a dedicated guide on processing Danger Goods in WorldShip, see ups.com/assets/resources/webcontent/en_US/dangerous_goods.pdf (English-Only).
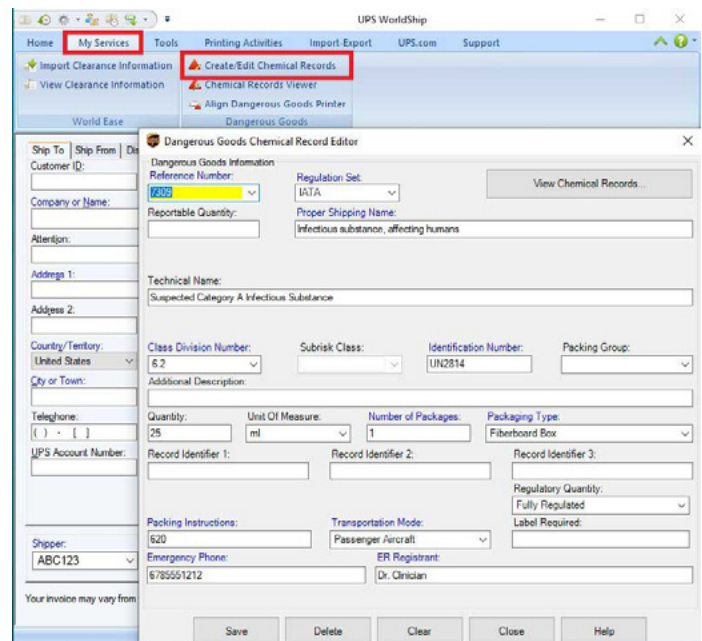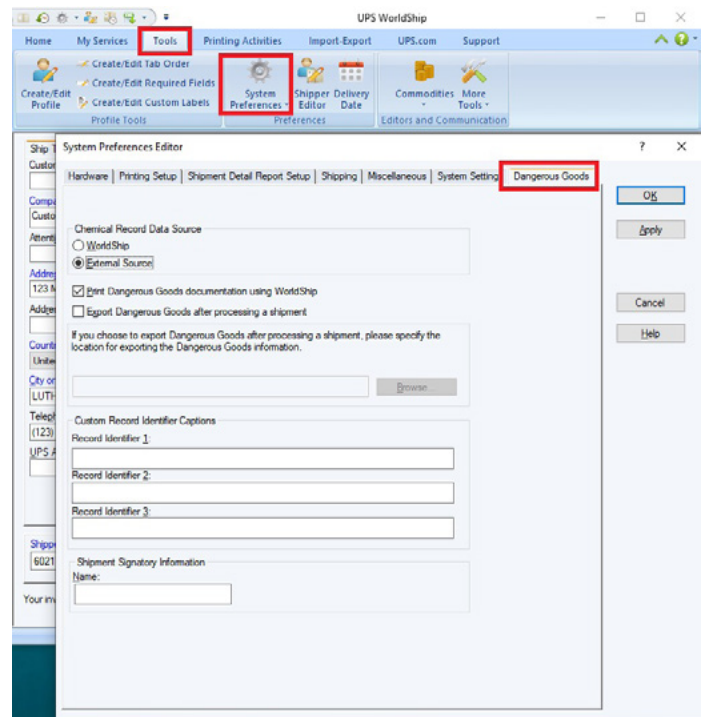
Dangerous Goods Shipments

Editing a Dangerous Goods Chemical Record

The Dangerous Goods Chemical Record Editor allows the shipper to view, delete or modify an existing Dangerous Goods record, which can then be stored in the Personal Chemical Table.

To edit a Dangerous Goods (DG) record:

1. To enter a new chemical record, **select New Record** from the DG Reference box on the Options tab in the Shipping window (the New Record option only appears if you selected WorldShip as a database resource).

2. The Dangerous Goods Chemical Goods Record Editor window appears. Regulation Set is selected and disabled. The information for Quantity, Unit of Measure and Packaging Type is required, and the Transportation Mode is obtained from the Regulation Set.

3. When you **click Save**, WorldShip prompts you for any missing information and informs you that the chemical record is saved to the Chemical Table.

4. When you **click Delete**, WorldShip prompts you to confirm the deletion of the current record from the Chemical Table.

5. When you **click Clear**, WorldShip alerts you with a warning message if the chemical record was modified and prompts you to clear or preserve the editor.

Dangerous Goods Shipments

Viewing a Dangerous Goods Chemical Record

You can view chemical records from the Personal Chemical Table or the UPS Chemical Table by selecting the Dangerous Goods Chemical Record Viewer on the My Services tab in the Shipping window or by clicking View Chemical Records in the Dangerous Goods Chemical Record Editor.

To view a record from the Personal Chemical Table:

1. In the Dangerous Goods Chemical Record Viewer window, the Chemical Table defaults to Personal, the Regulation Set defaults to All, and Search Results displays all records for all regulation sets that currently exist in the Personal Chemical Table. You can enter specific search criteria and filter search results.

2. **Select a record** and look under Record Details for the record's fields and values.

3. To delete the selected record, **click Delete** and then **confirm the deletion**.

To view a record from the UPS Chemical Table:

1. In the Dangerous Goods Chemical Record Viewer window, **select UPS** under Chemical Table. Regulation Set defaults to the first regulation set in the table. The search criteria include the Regulation Set, Identification Number and Proper Shipping Name. Search Results displays all records with the same regulation set determined by the value set in the Regulation Set.

2. Record Details displays the value or content of the currently selected record. You cannot delete the selected record.

3. You can add UPS Chemical data to your Personal Chemical Table for use on Dangerous Goods shipments.
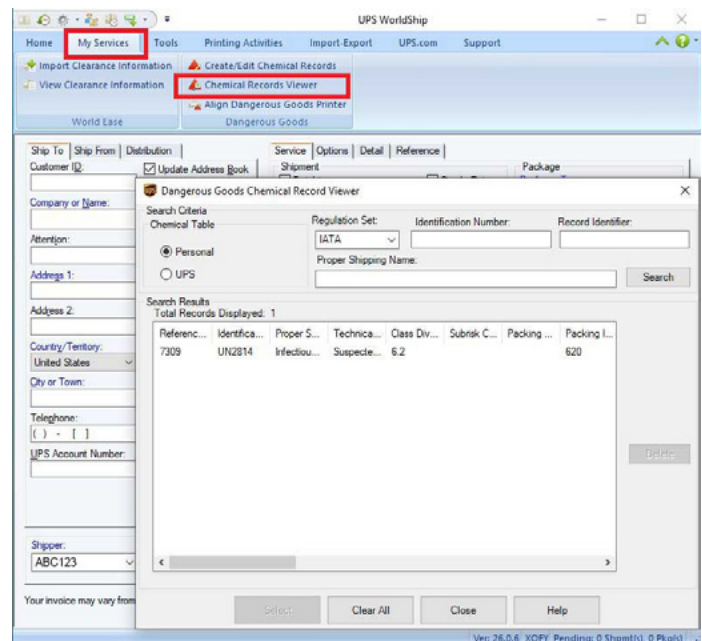
Dangerous Goods Shipments

Processing a Dangerous Goods shipment

1. **Specify the Ship To address**.
2. **Specify the Ship From addres**s.
3. **Specify the shipment-level and option details**, such as UPS service and bill-to information, commodity information, shipping options, shipment dimensions, shipment description, shipment reference numbers and a packing list.
4. On the Options tab, **select Dangerous Goods**.
5. **Click the down arrow** in the Current Regulation Set box and **select the appropriate regulation set**.
6. **Click the down arrow** in the DG Reference 1 box and **select a DG reference** or **click Details** to search for the DG reference.
7. **Repeat steps 5 and 6** if you have additional Dangerous Goods in your shipment. If not, **click Process Shipment**.

To process a Dangerous Goods shipment as part of a freight shipment:

1. Follow steps 1 and 2 above.
2. On the Service tab, **select the Freight check box** and a **Ground Freight UPS service**, **supply the commodity information** and the **HM/DG check box**.
3. On the Options tab, the HAZMAT/Dangerous Goods check box will already be selected. **Supply the Emergency Contact Name and Emergency Telephone**.
4. **Click Process Shipment**.
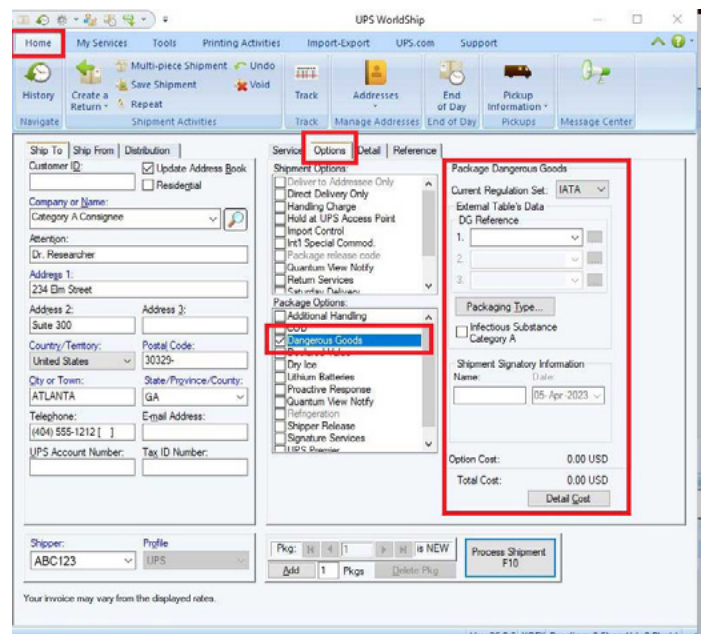
Frequently Asked Questions (FAQs)

Q: How do I move my WorldShip database?

A: **Visit the Support tab in WorldShip**, **select Move Data** and **follow the instructions**. Be sure to take note of the backup location on computer No. 1 since you will need to copy that backup file to computer No. 2. Also note the folder location where WorldShip is installed on computer No. 1; you must install WorldShip on computer No. 2 in that same folder location or your data cannot be moved correctly. Finally, during the installation of WorldShip on computer No. 2, be sure to **select the Finish Moving WorldShip Data option** in the setup window.

Refer to the guide located at ups.com/assets/resources/webcontent/en_US/worldship_moving_enu.pdf.

Q: WorldShip will not allow me to upgrade

A: WorldShip is able to upgrade up to two software versions older than the current version. **Verify your WorldShip version** and **check the current version** on ups.com/us/en/business-solutions/business-shipping-tools/worldship.page. If you are on a software version older than two versions from the current one, you will need to call Technical Support for help upgrading (see the Access Help section of this guide on page 41). Prior to upgrading, ensure your computer meets the minimum system requirements, which can be found at the link above.

Q: How do I back up and restore my WorldShip data?

A: You can back up your WorldShip data either in WorldShip itself or in the UPS WorldShip Support Utility, whichever you prefer. Restoring a previous backup must be done using the UPS WorldShip Support Utility.

To back up your WorldShip data, **visit the Support tab in WorldShip** and **select Backup Data**. The Backup Files window opens and shows the default (recommended) location where your data will be saved. **Click Browse** to select a different location if needed. **Click Backup** to save your WorldShip data.

To back up or restore your WorldShip data using the UPS WorldShip Support Utility, **open the Start Menu** on your Windows desktop and **scroll through your list of applications** to the UPS folder. **Open the UPS folder** and s**elect the UPS WorldShip Support Utility**. **Select the Data Maintenance utility** and **select either the Backup** or **Restore button**.

Backup: The Backup Files window opens and shows the default (recommended) location where your data will be saved. **Click Browse** to select a different location if needed. **Click Backup** to save your WorldShip data.

Restore: The Restore Files window opens and shows a list of your backup files. **Select the file** you wish to restore and **click Restore** to apply the data.

Frequently Asked Questions (FAQs)

Q: How do I see my negotiated rates in WorldShip?

A: Setting up WorldShip to calculate and display the negotiated/discounted rates defined in your UPS contract requires three steps:

1. **Request rates** from UPS.
2. After UPS sends the rates to WorldShip, **apply rates**.
3. **Set your rating preferences** to display the negotiated rates where you want them.

- To request negotiated rates, **visit the Tools tab** and **click the Shipper Editor button**. **Highlight the account** you want to request rates for and **check the Negotiated Rates Status**. If it says "click Request Rates" then you are ready to begin. If the status is blank or disabled, you will need to contact your UPS sales representative to have negotiated rates enabled for your contract. **Click the Request Rates button** to continue.

- WorldShip might ask you to authenticate your account before your request for rates is approved. If so, you will need to provide information from a recent UPS billing invoice to confirm that you are an authorized user of the account. Make sure that your UPS billing invoice is one of the three most recent invoices issued for the account and that it is no older than 90 days (U.S.) or 45 days (outside the U.S.).

- Once you request rates, the Negotiated Rates Status will change to "Rates Requested" (assuming your request was approved). UPS will send your negotiated rates to WorldShip during overnight hours. Usually on the next business day when you restart WorldShip you will see a message that new rates have been received and it asks if you want to apply them. **Select Apply Rates Now** (recommended) or **schedule the rates to be applied later**. When rates are applied, the Negotiated Rates Status will change to "Rates Applied".

   Note: After applying negotiated rates, UPS will periodically send updates to your WorldShip workstation (typically weekly). Be sure to apply those updates when prompted to keep your rates accurate.

- Once rates are applied, **highlight** the account in the Shipper Editor and **click Modify**. **Select the Rating Preferences tab** and **configure which rates** you want displayed by WorldShip. You may choose a primary and secondary rate to display on the Shipping and Shipping History screens, on package or shipment labels, and on the Daily Shipment Detail Report. Rate options include negotiated rates, published rates, or neither – based on your preference.

   Important Note: If you have tried these steps and experience problems seeing your rates, refer to your account executive or UPS Technical Support.

   UPS Rate Distribution Policy

   - If your WorldShip software version is older than one (1) year behind: Not eligible to receive quarterly rate updates from UPS. However, the final version of last year's release is eligible to get December/January rates (i.e., last year's July build).

   - If your WorldShip software version is older than two (2) years behind: Not eligible to receive quarterly rate and other data updates, such as Peak Season Surcharge, Fuel Surcharge, periodic accessorials, and other service-related distributions from UPS.

Frequently Asked Questions (FAQs)

Q: Why is WorldShip displaying a 5001 error?

A: The 5001 error message indicates that your WorldShip registration has been deleted due to inactivity. You must re-register your WorldShip to continue.

Use the following steps to un-commission and re-register your WorldShip:

1. **Click OK** on the Error 5001 message.
2. **Open the UPS WorldShip Support Utility** from the Start menu.
3. In the Admin menu, **choose "Un-commission."**
4. **Restart WorldShip**. The Register with UPS dialog box should appear.
5. **Verify your information** and **click Finish** to complete the registration process.

Q: Why is my barcode and/or tracking information missing from my shipping label

A: Within WorldShip, **navigate to the Printing Setup menu** within the System Preferences Editor in WorldShip and **correct the current thermal label printer settings** (System Preferences Editor > Printing Setup).

Technical Support

You have several options to access help.

Within the software

WorldShip Help

- To search for specific information, **select the Support tab** from the main WorldShip screen.
- To find help for a specific window, **click the** 🌐 in the top right corner (if available) and then **a field**, **then click the Help button** (if available) or **hold down the Shift key** and **click F1**.

On the Web

Go to ups.com/worldshipsupport to find additional support documents and guides.

Technical support by phone

For any questions about WorldShip not answered by this guide or WorldShip Help, please call your local WorldShip technical support telephone number ups.com/assets/resources/webcontent/en_US/Technical_Support_Numbers.pdf.

For general information that is not software related, call 1-800-PICK-UPS® (1-800-742-5877) in the U.S. For international shipping information, call 1-800-782-7892 in the U.S. For non-U.S., consult your local ups.com webpage.

Please be sure you have the following information when you call:

- Your UPS account number and WorldShip Software Version (found in the lower right-hand corner of the WorldShip screen or in the About WorldShip window after clicking the 🌐 in the main menu).
- Name and version of your PC operating system and type of printer.

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