

Shipment Templates and Drafts

At any point in creating your shipment, you may save a template. You can save a **shipment template**, which will save any shipment and packaging information you have input so far. This template can then be accessed for future use. Saving **drafts** will allow you to save any shipment information that you have input so far, so that it can be put aside and finished as a shipment at a later time.

Saving Templates and Drafts

Video url, <https://youtu.be/69Zcy-rqrL4>

Saving Templates

You can select **Save Template** in the action bar on the current shipment screen. This will give you the option to save a new template or overwrite an existing template, which would update the shipment information in that template.

The screenshot displays the UPS shipment creation interface. On the left is a sidebar with navigation links: **Shipment** (Current Shipment, Package - Fibreboard Box (4G), UN1993, Flammable liquids, n.o.s., 3, III, Manage Overpack, Drafts (11)), **Manage** (History, Templates, Package Marking Settings), **Print** (Shipments, Certifications, Package Markings), and **Tools** (Address Book, Advanced Alignment, Report Layout Editor, Integration). The main area contains a form with fields for Regulation (49 CFR), Form Type (UPS Laser), Carrier (United Parcel Service), and Transport Mode (Ground). An 'Add Carrier' button is present. Below these are fields for Shipper and Consignee, each with a 'Look up' button. A 'Save shipment template' dialog box is open in the center, allowing the user to choose between 'New Template' and 'Existing Template'. It includes fields for 'Template Name' (pre-filled with 'user template'), 'Location' (pre-filled with 'Entire Company'), and 'Template Description'. 'Save' and 'Cancel' buttons are at the bottom of the dialog. On the right, a preview of the shipping label is shown, featuring the UPS logo and various fields for Account Number, Emergency Contact Number, Reference Number, and Hazardous Materials Description. The label also includes a 'Carrier Use Only' section with fields for Title, BUC, Date, and Signature. The bottom of the label indicates 'Page 1 of 1' and '1 Package'.

Selecting a shipment template

With no shipments open in the current shipment screen, you'll see your saved shipment templates under your available forms, which is now readily available for future shipments. Select the template to open as a current shipment.

Shipment Templates and Drafts

Shipment

Current Shipment

Drafts

Manage

History

Templates

Package Marking Settings

Print

Shipments

Certifications

Package Markings

Tools

Address Book

Advanced Alignment

Report Layout Editor

Integration

Blank Shipment

FedEx Ground + FedEx Laser

FedEx Air + Shipper's Declaration

UPS Domestic + UPS Laser

UPS International + Shipper's Declaration

UPS Canada Crossborder + Crossborder Laser

International Air + Shipper's Declaration

49 CFR + Shipper's Declaration

49 CFR + Bill of Lading

Regulation

[Select]

Form Type

[Select]

View

My Templates

Find Match for


Search

Clear

Page 1 of 1

Expand All

+



Name

user template

Regulation

49 CFR

Form Type

UPS Laser


Use Counter

2

Last Used Date/Time

Tuesday, September 15, 2015

+



Name

UN1993 Template

Regulation

49 CFR

Form Type

UPS Laser

Use Counter

1

Last Used Date/Time

Monday, September 28, 2015

Saving drafts

Saving a draft allows you to save all the shipment information that you have entered so that you can put it aside and continue at a later time. From the current shipment screen, you can select Save Draft to save the shipment as a draft.

Shipment

Current Shipment

Package - Fibreboard Box (4G)

UN1993, Flammable liquids, n.o.s., 3, III

Manage Overpack

Drafts (12)

Manage

History

Templates

Package Marking Settings

Print

Shipments

Certifications

Package Markings

Tools

Address Book

Advanced Alignment

Report Layout Editor

Integration

Actions [New] [Add Material] [Save Template] [Save Draft] [Complete]

Regulation
49 CFR

Carrier
United Parcel Service

Add Carrier

Form Type
UPS Laser

Transport Mode
Ground

Shipper
Reference
Find

Name
Corey Abram

Address Info
123 Main St

City
Seattle

Postal Code
98122

Consignee
Reference

Save Draft

Shipment Name
user draft

Shipment Description

☐ Do not show this pop-up again while working with this shipment

[Save Draft] [Cancel]

Shipment Templates and Drafts

Selecting draft

After saving the shipment as a draft, you'll be able to select in the future by clicking on Drafts on the left hand side of the navigation bar. You'll click Edit to open your draft as a current shipment.

Shipments

- Current Shipment
- Drafts**
- History
- Templates
- Package Marking Settings

Manage

Form Type: UPS Laser Regulation: [Select] Shipment Dates: All Dates Shipment Collections: [Select]

Search for: [Select] Find Match for: [Select] View: My Drafts [Search] [Clear]

Actions: [Print All]

Draft Shipments Page 1 of 1 [Expand All] [Select All]

Select	Edit	Consignee Address	Lock Status	Locked by User	Shipment Name	Shipment Description	Created Date	Delete
<input type="checkbox"/>	<input checked="" type="checkbox"/>		Unlocked	-	user draft		8/21/2015	<input type="checkbox"/>

If there is already a shipment open in Current Shipment, you'll be prompted to save the progress of the shipment as a draft before opening your draft.