

## Shipment Templates and Drafts

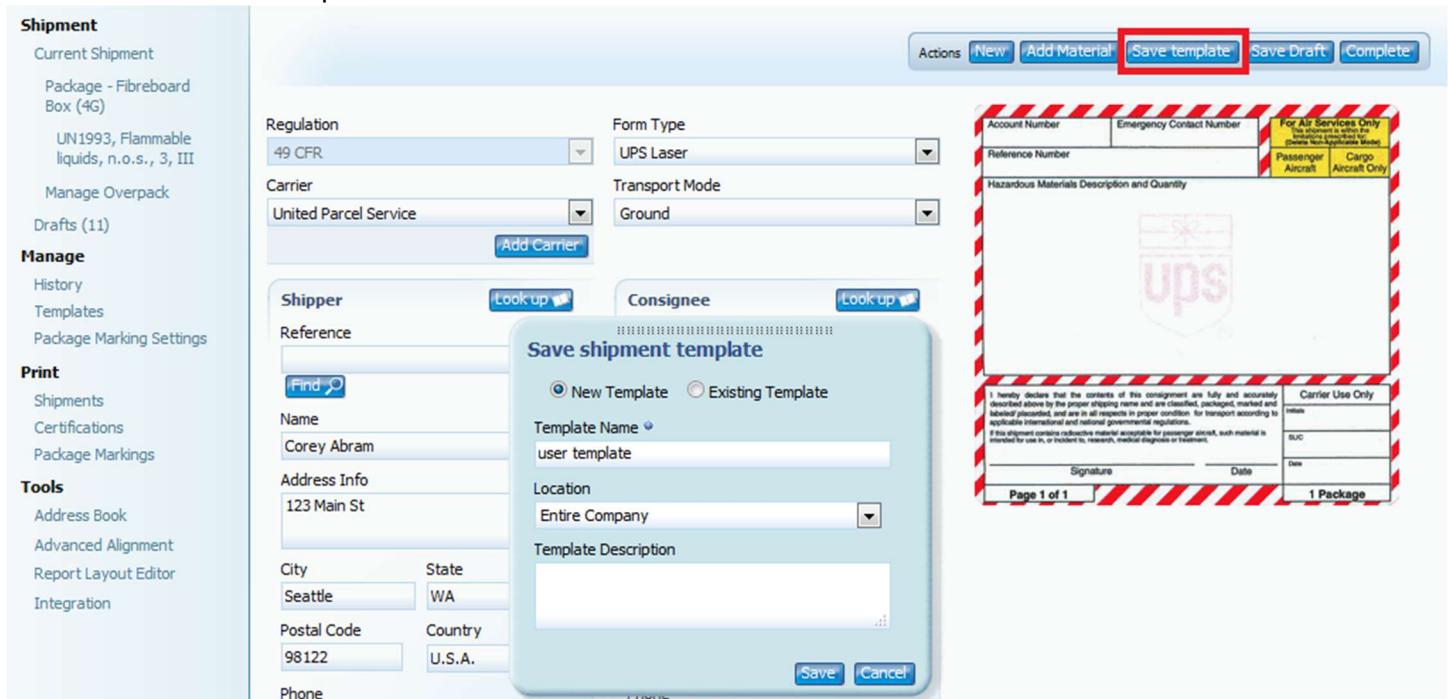
At any point in creating your shipment, you may save a template. You can save a **shipment template**, which will save any shipment and packaging information you have input so far. This template can then be accessed for future use. Saving **drafts** will allow you to save any shipment information that 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 shows the ShippingEasy software interface. On the left, there is a sidebar with navigation links for Shipment, Manage, Print, and Tools. The main workspace shows a current shipment for a package labeled 'Box (4G)' with 'UN1993, Flammable liquids, n.o.s., 3, III'. The 'Carrier' is set to 'United Parcel Service' and 'Transport Mode' is 'Ground'. Below this, there are fields for 'Shipper' and 'Consignee', both with 'Look up' buttons. A 'Save shipment template' dialog box is open in the center. It has two radio buttons: 'New Template' (selected) and 'Existing Template'. The 'Template Name' is 'user template'. The 'Location' is 'Entire Company'. The 'Template Description' field is empty. At the bottom of the dialog are 'Save' and 'Cancel' buttons. The top right of the screen shows an 'Actions' bar with buttons for 'New', 'Add Material', 'Save template' (which is highlighted with a red box), 'Save Draft', and 'Complete'. To the right of the main workspace, there is a large red-bordered area containing a UPS logo and text related to air services and hazardous materials.

#### 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  Form Type  View  Find Match for

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Name	Regulation	Form Type	Use Counter	Last Used Date/Time
user template	49 CFR	UPS Laser	2	Tuesday, September 15, 2015
UN1993 Template	49 CFR	UPS Laser	1	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

Regulation  Form Type  Carrier  Transport Mode

Shipper  Consignee  Reference

**Save Draft**

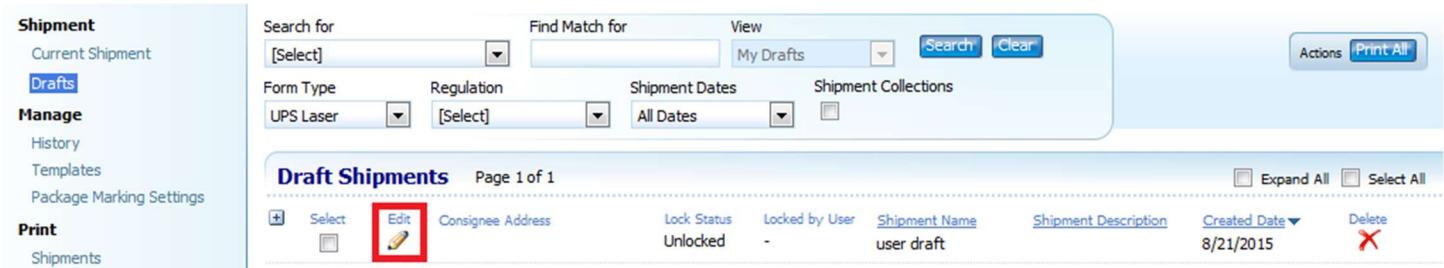
Shipment Name  Shipment Description

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

## 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.



The screenshot shows the 'Draft Shipments' page. On the left, a sidebar menu includes 'Shipment', 'Current Shipment', 'Drafts' (which is selected and highlighted in blue), 'Manage', 'History', 'Templates', 'Package Marking Settings', 'Print', and 'Shipments'. The main area has search and filter controls: 'Search for' with dropdowns for 'View' (set to 'My Drafts'), 'Find Match for' (dropdown), 'View' (dropdown), 'Search' and 'Clear' buttons; 'Form Type' dropdown (set to 'UPS Laser'), 'Regulation' dropdown (set to 'Select'), 'Shipment Dates' dropdown (set to 'All Dates'), and 'Shipment Collections' dropdown. Below these are buttons for 'Actions' (including 'Print All') and 'Expand All' and 'Select All' checkboxes. The main table header for 'Draft Shipments' includes columns: '+', 'Select' (with a checkbox icon), 'Edit' (with a pencil icon, which is highlighted with a red box), 'Consignee Address', 'Lock Status' (set to 'Unlocked'), 'Locked by User' (set to '-'), 'Shipment Name' (set to 'user draft'), 'Shipment Description', 'Created Date' (set to '8/21/2015'), and 'Delete' (with a red X icon).

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.