pitney bowes

USER GUIDE

Shipping Calendar

CONTENTS

INTRODUCTION 4
APPLICATION FLOW 4
STEP 1: ONBOARDING FOR FIRST TIME USERS 5
1.1. TERMS AND CONDITIONS 5
1.2. LOG IN TO YOUR GOOGLE ACCOUNT 5
1.3. SYNC YOUR GOOGLE CALENDAR 6
STEP 2: DASHBOARD VIEW FOR REGULAR USERS 7
2.1. DASHBOARD: PLANNER 7
2.2. DASHBOARD: OVERDUE SHIPMENTS 8
STEP 3: SCHEDULE SHIPMENT 8
3.1. TARGET DELIVERY DATE AND TITLE 9
3.2. SENDER DETAILS 9
3.3. RECIPIENT DETAILS 10
3.4. PARCEL DESCRIPTION 10
STEP 4: EDITING A SHIPMENT 12
4.1. EDITING DELIVERY DATE 12
4.2. EDITING SENDER DETAILS 13
4.3. EDITING RECIPIENT DETAILS 13
4.4. EDITING PACKAGE TYPE 14
STEP 5: TODAY'S SHIPMENTS 15
STEP 6: PRINTING LABELS FOR SHIPMENTS 16
6.1. LABEL PREVIEW 17
6.2. REQUESTING A REFUND 18
STEP 7: MANAGE UPCOMING SHIPMENTS 18
STEP 8: SENT SHIPMENTS 19
8.1. REPRINTING A LABEL 19
STEP 9: PAYMENT 19
FREQUENTLY ASKED QUESTIONS 19
1. General Questions 19
1.1. I do not use Google Calendar; can I still use Shipping Calendar? 19
1.2. Do I need a separate calendar for Shipping Calendar or can it work with my current Google Calendar? 19
1.3. Which shipping carriers are available in Shipping Calendar? 20

1.4. Are the same shipping discounts available through shipping calendar?.... 20
1.5. Is my customer data secure with Shipping Calendar? 20
2. Onboarding..... 20
2.1. How soon can I get started with Shipping Calendar? 20
3. Shipment Scheduling 20
3.1. Can I view my shipments by date?..... 20
3.2. Can I deliver a shipment on the same day using Shipping Calendar? 20
4. View daily shipments 20
4.1. How can I view my daily shipments? 20
5. Edit your shipments..... 20
5.1. Can I edit and view my shipment details anytime I want? 20
5.2. Can I delete an unwanted shipment?..... 21
6. Payments 21
6.1. How will I be charged for shipping labels? 21
6.2. Can I request a refund? 21

Shipping Calendar

INTRODUCTION

Manage your shipment calendar and get recommendations on the most cost-efficient shipping options for a target date

Shipping Calendar helps you manage your shipment schedule and recommends the most cost-efficient shipping options for a target delivery date to reduce delivery costs and improve productivity. With Shipping Calendar, we make your Google Calendar Shipping Events accessible. You can also print trackable labels from calendar events.

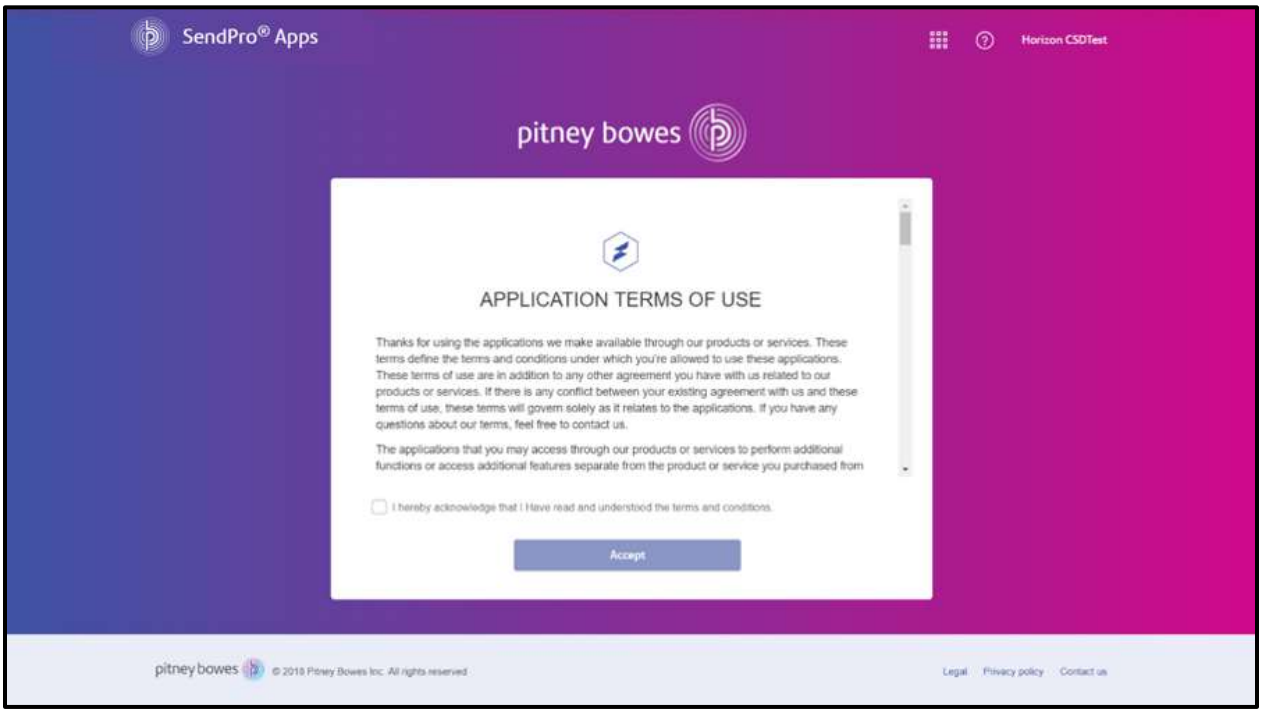
APPLICATION FLOW

1. ONBOARDING FOR FIRST TIME USERS– This directs users to the google account access page
2. SYNCING WITH GOOGLE CALENDAR – Sync your web appl with your Google Calendar
3. DASHBOARD FOR REGULAR USERS – Easily access all functionalities of the app
4. ADD CALENDAR EVENT – Schedule your shipments to view the best shipping options based on your target delivery date
5. VIEW TODAY'S SHIPMENTS – View all shipments due for sending on the current date
6. PRINTING LABELS FOR SHIPMENTS – Print trackable labels for scheduled shipments
7. MANAGE UPCOMING SHIPMENTS – Ignore or delete your scheduled shipments

STEP 1: ONBOARDING FOR FIRST TIME USERS

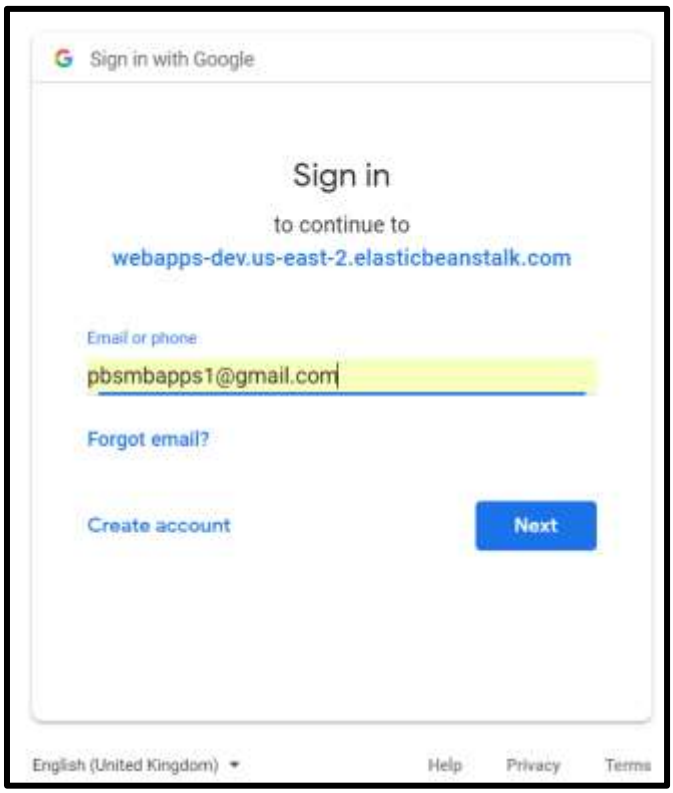
1.1. TERMS AND CONDITIONS

Click on the Shipping Calendar plug-in icon from the App Dashboard to get started. It will direct you to Terms and Conditions Page, please read and understand the terms and conditions, check the box and tap on the 'Accept' button.



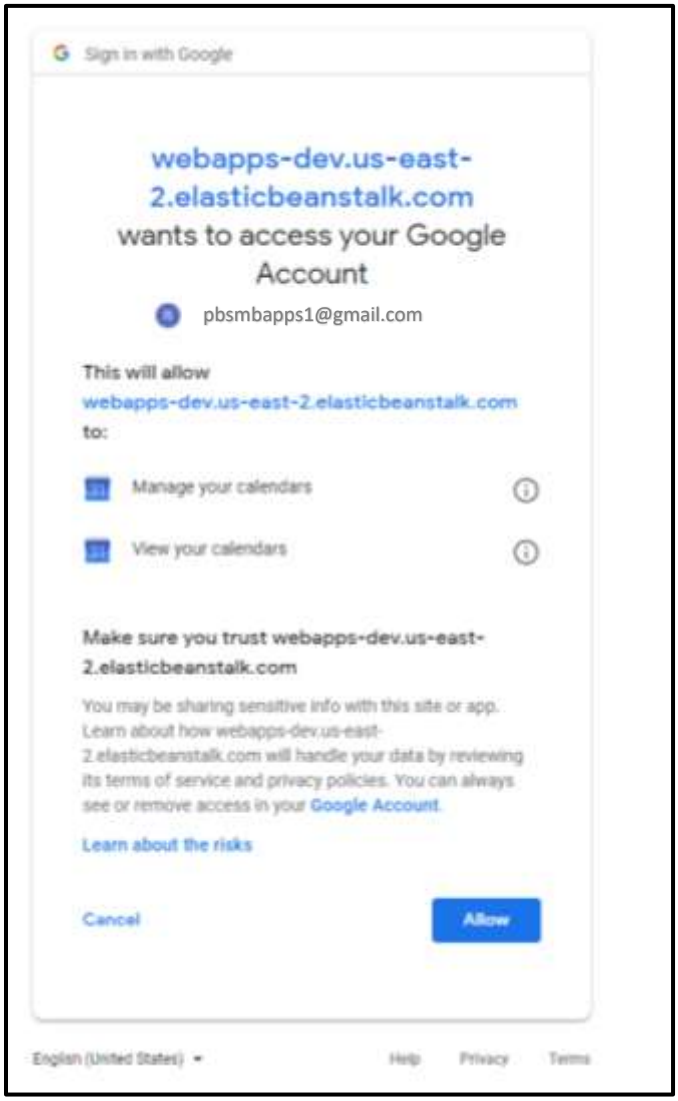
1.2. LOG IN TO YOUR GOOGLE ACCOUNT

After accepting the Terms and Conditions, you will then be directed to Google account login page. Log in to your account with the valid credentials.



1.3. SYNC YOUR GOOGLE CALENDAR

After logging in by valid credentials, allow synchronizing of Google Calendar events to the Shipping Calendar app. Tap on 'Allow' to grant access and synchronize your Google Calendar with the app.

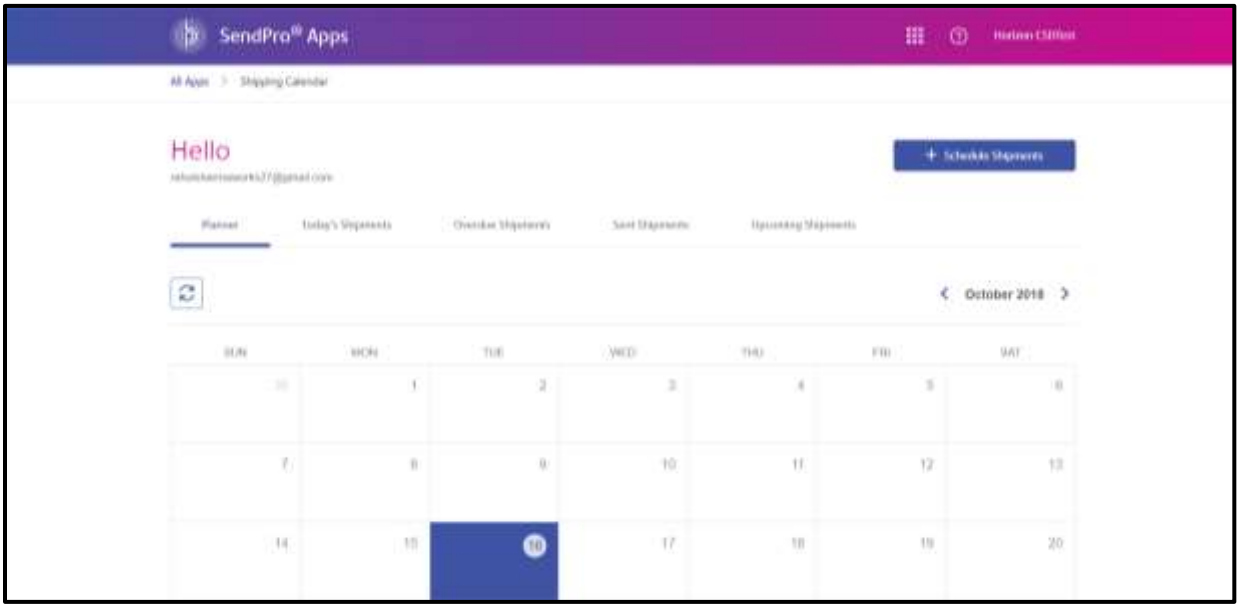


If you don't have a Google account, you cannot access the Shipping Calendar app. Although you will view a 'Create account' option, you can use this option to create a new Google account.

STEP 2: DASHBOARD VIEW FOR REGULAR USERS

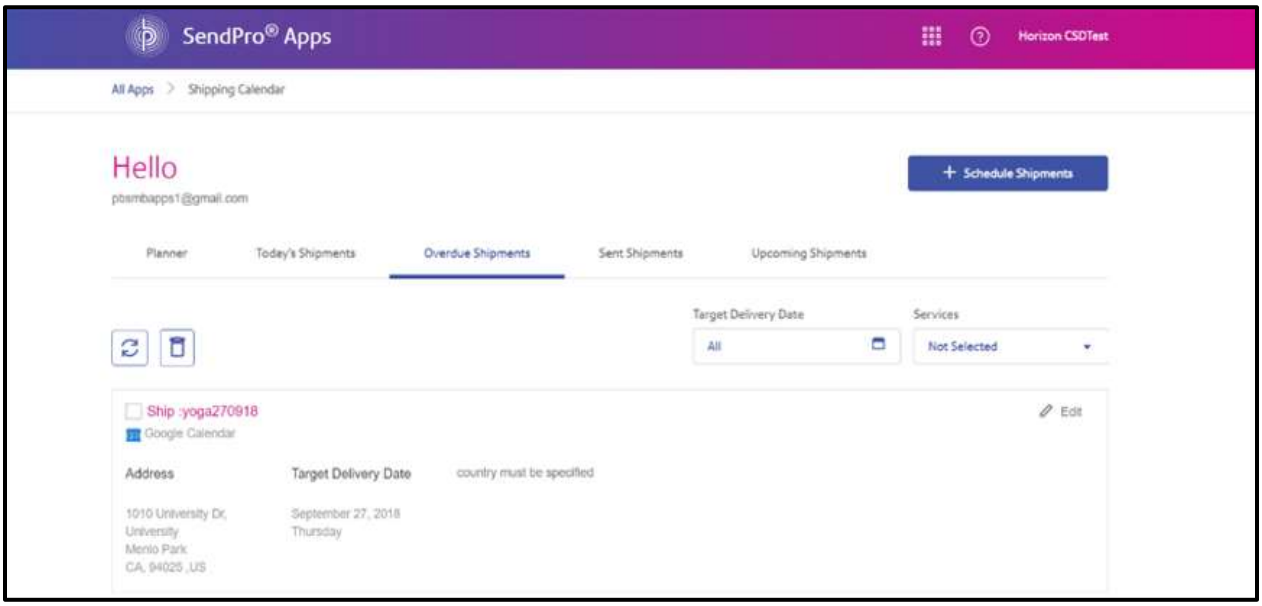
2.1. DASHBOARD: PLANNER

You will be directed to the dashboard after logging in to your google account. The screen provides quick access buttons to the schedule shipments and lets you view shipments of the selected date. You can view the current day shipments, overdue shipments, sent shipments and upcoming shipments for any future date. You can also add calendar events for any date.



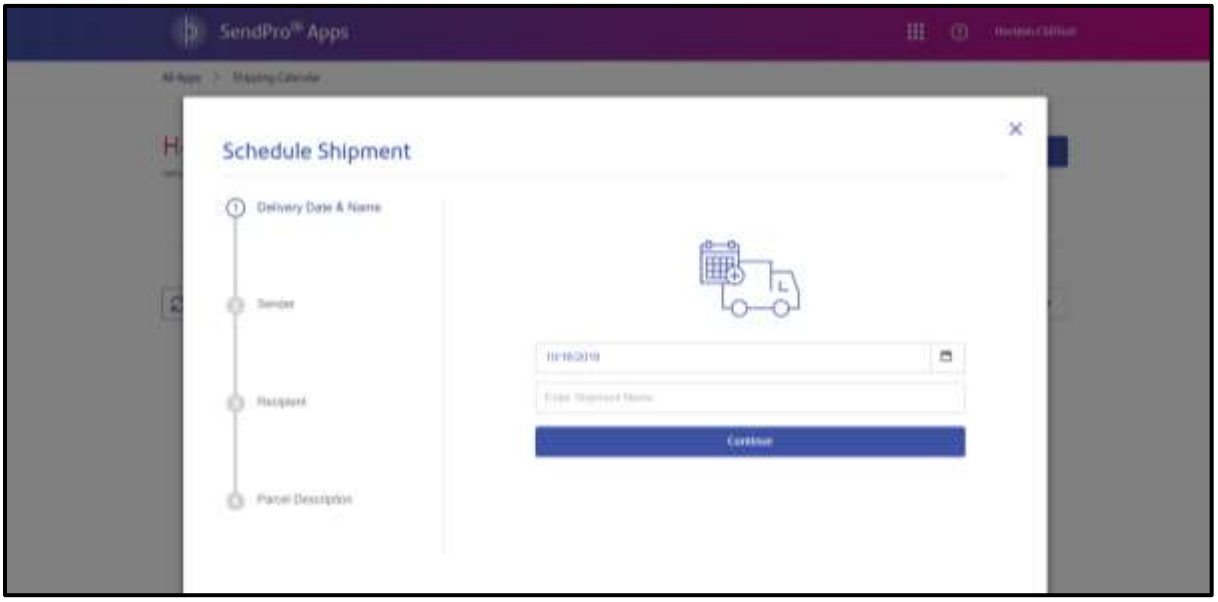
2.2. DASHBOARD: OVERDUE SHIPMENTS

This contains the shipments, which are overdue, and you can select shipments based on Target delivery date. You can edit and delete the shipments as well.



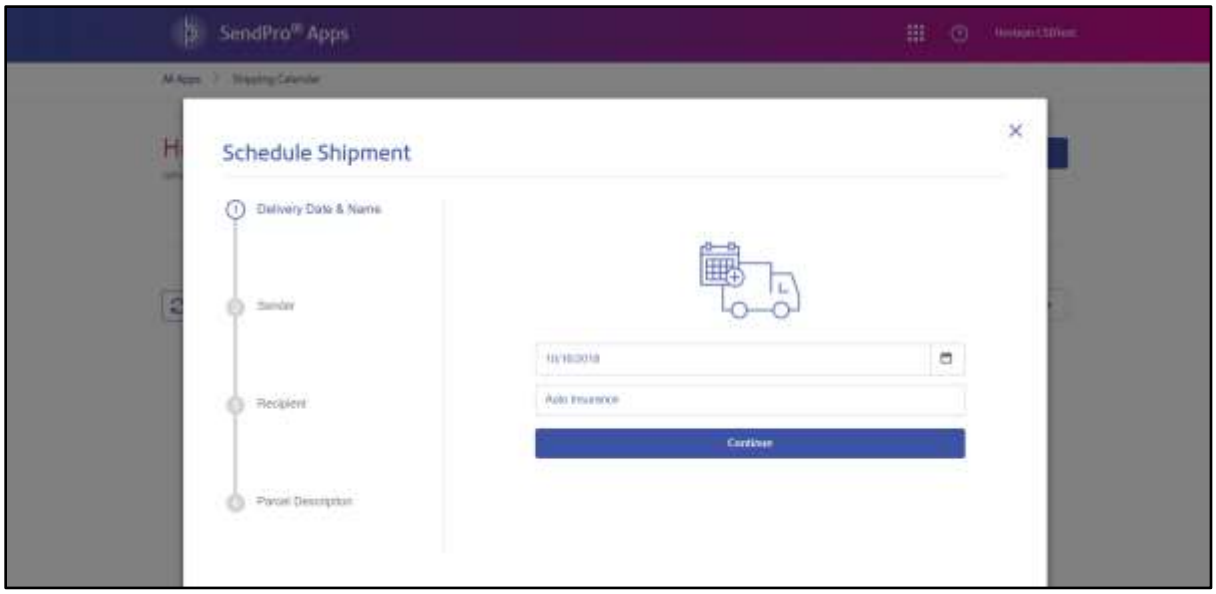
STEP 3: SCHEDULE SHIPMENT

Tap on the 'Schedule Shipment' option on the top corner of the dashboard screen to schedule a shipment.



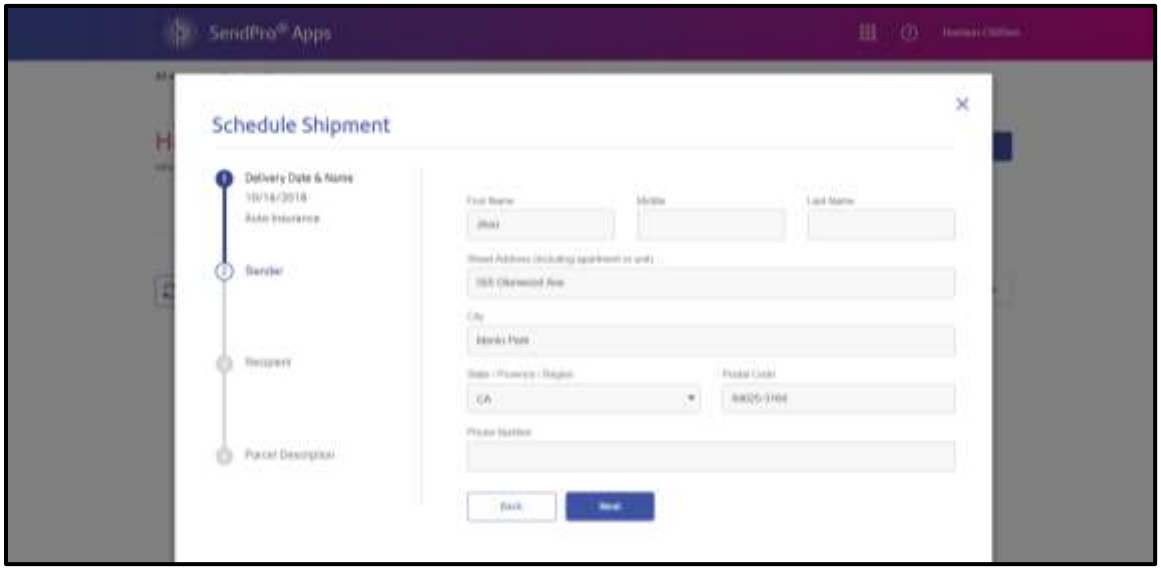
3.1. TARGET DELIVERY DATE AND TITLE

At the start of scheduling a shipment, you will be required to select the target delivery date on the calendar provided and you will need to assign a title to the event. You can search for the calendar event using the event title later, click on proceed.



3.2. SENDER DETAILS

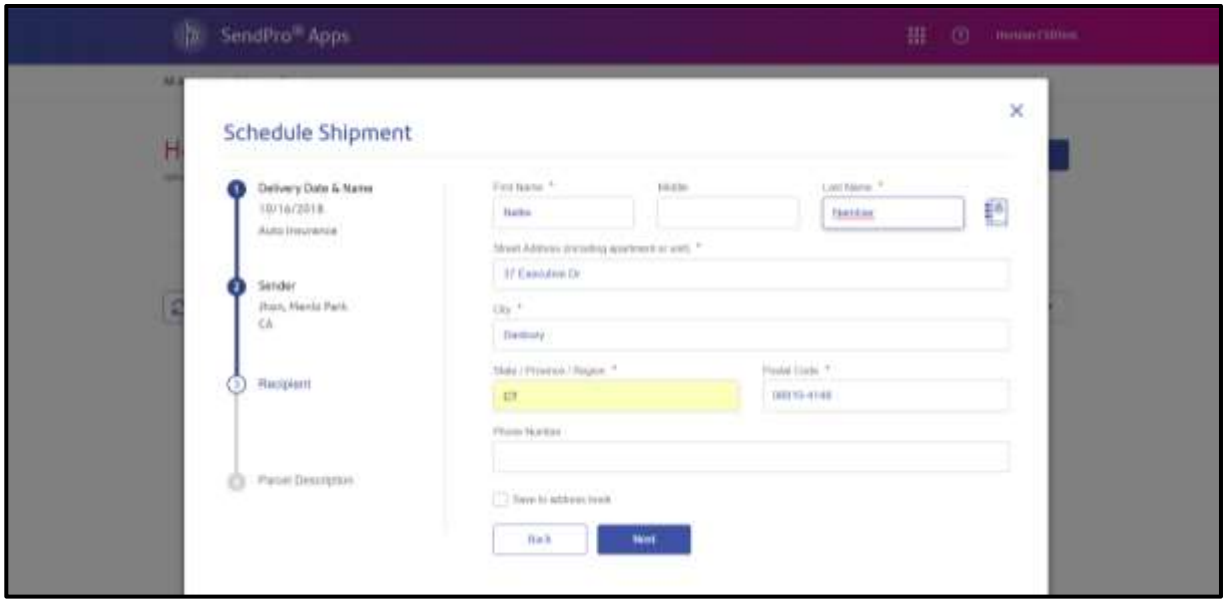
After clicking on proceed, you will be required to enter your details such as name, address, postal code and phone number and tap on ‘Next’ to navigate further.



Sender's details will be auto populated the second time when you will be scheduling a shipment.

3.3. RECIPIENT DETAILS

You will be required to fill in the Recipient Details in the form (as shown below) and tap on 'Next' to navigate further. Before scheduling of the shipment, the address will be validated.

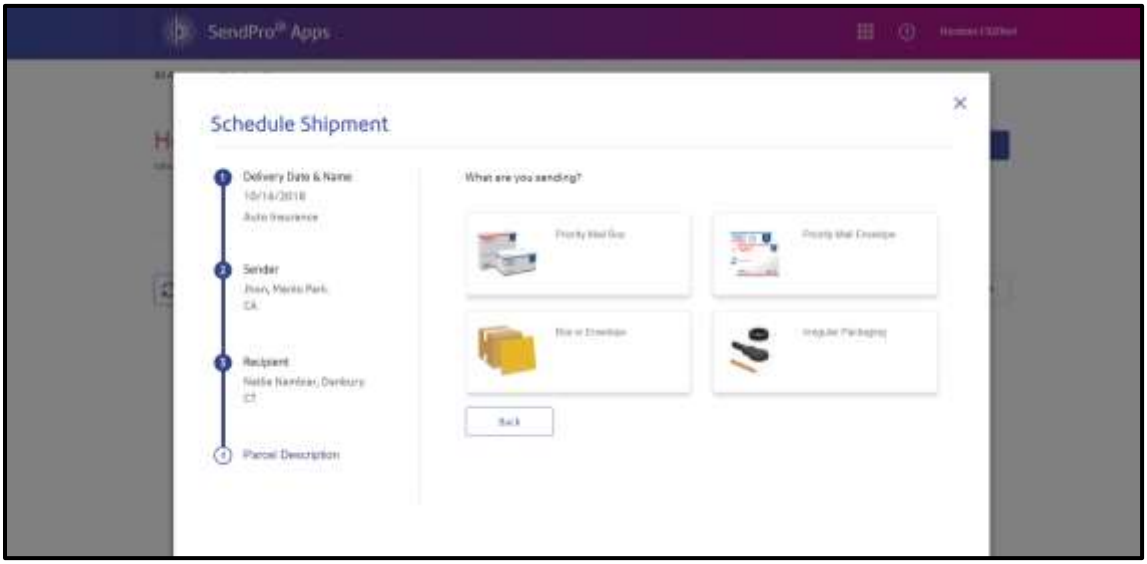


You can add recipients from your address book by tapping on the icon provided. You will be directed to the stored addresses and you can select the recipient details to be automatically filled.

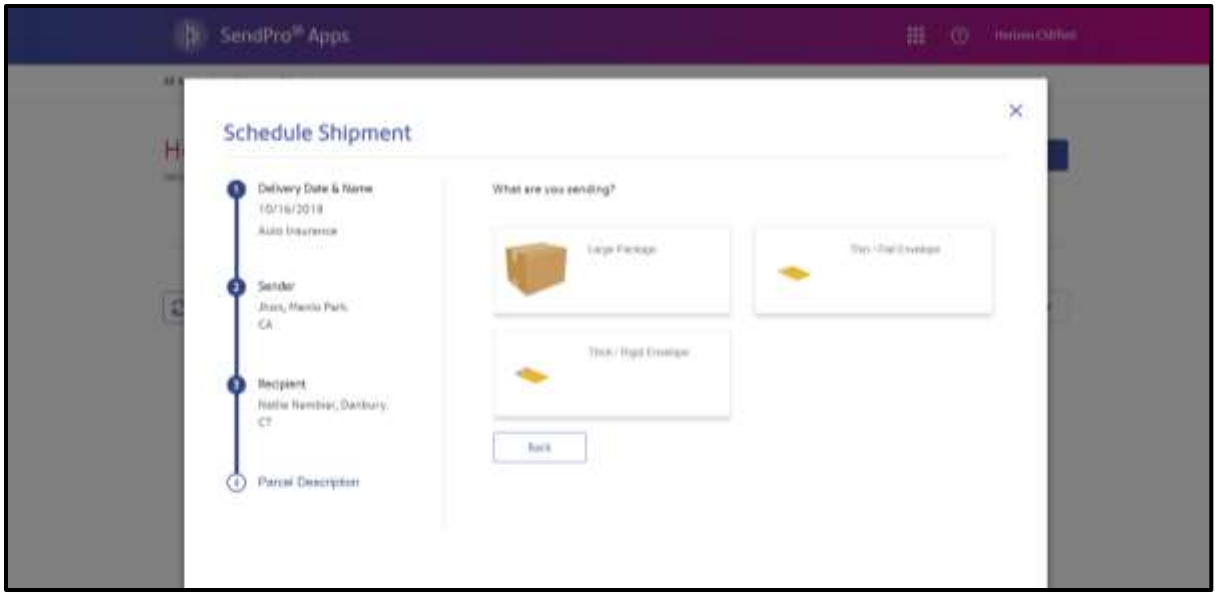
There is also an option to save recipients address to your address book at the bottom of the form.

3.4. PARCEL DESCRIPTION

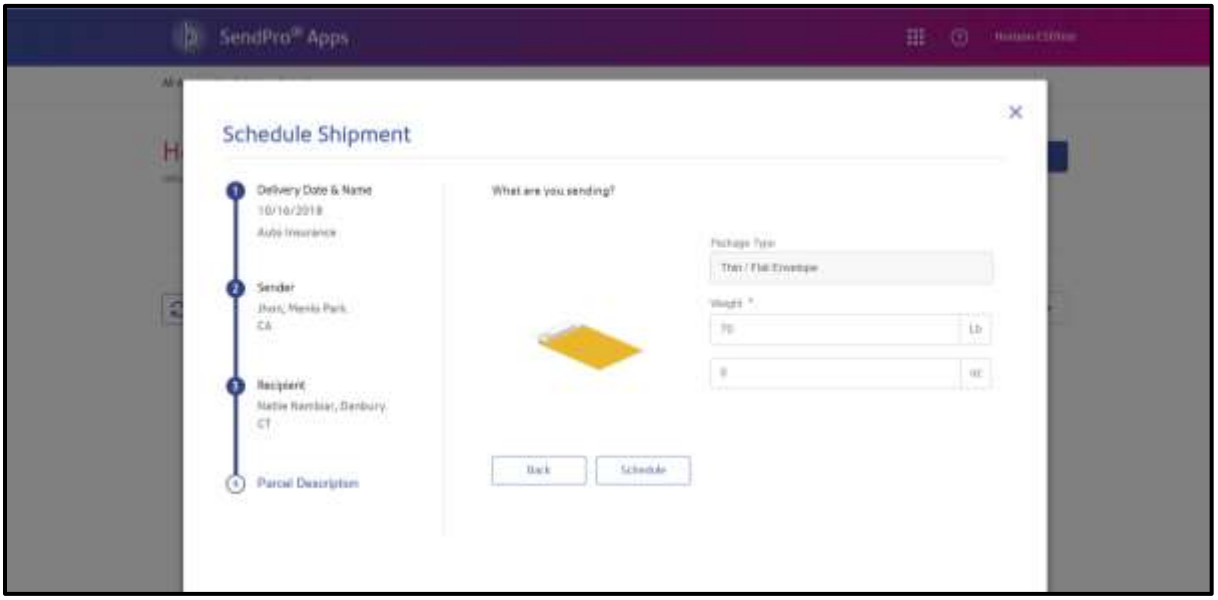
You will have to select the parcel type from the options provided.



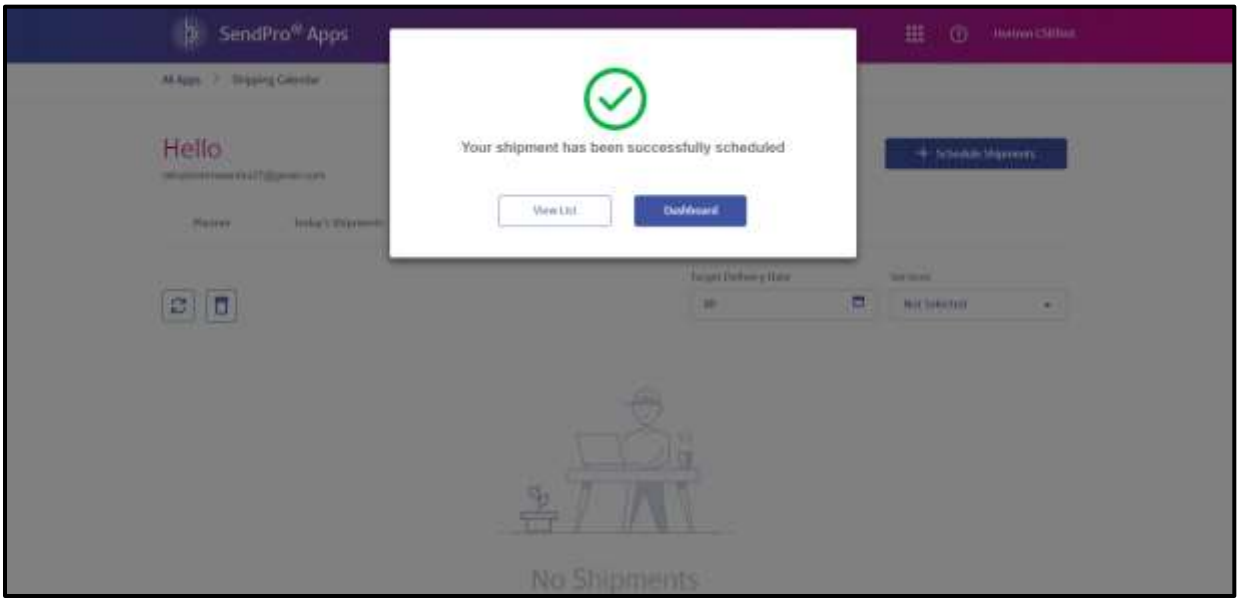
You can select custom packages or pre-defined USPS mail categories.



After selecting the type of parcel, you will be required to select the package type and enter the weight of the package. Once entered all the details you can now schedule the shipment.



After clicking on the schedule, shipment is created. A confirmation message will appear which will enable you to view list or go to dashboard.

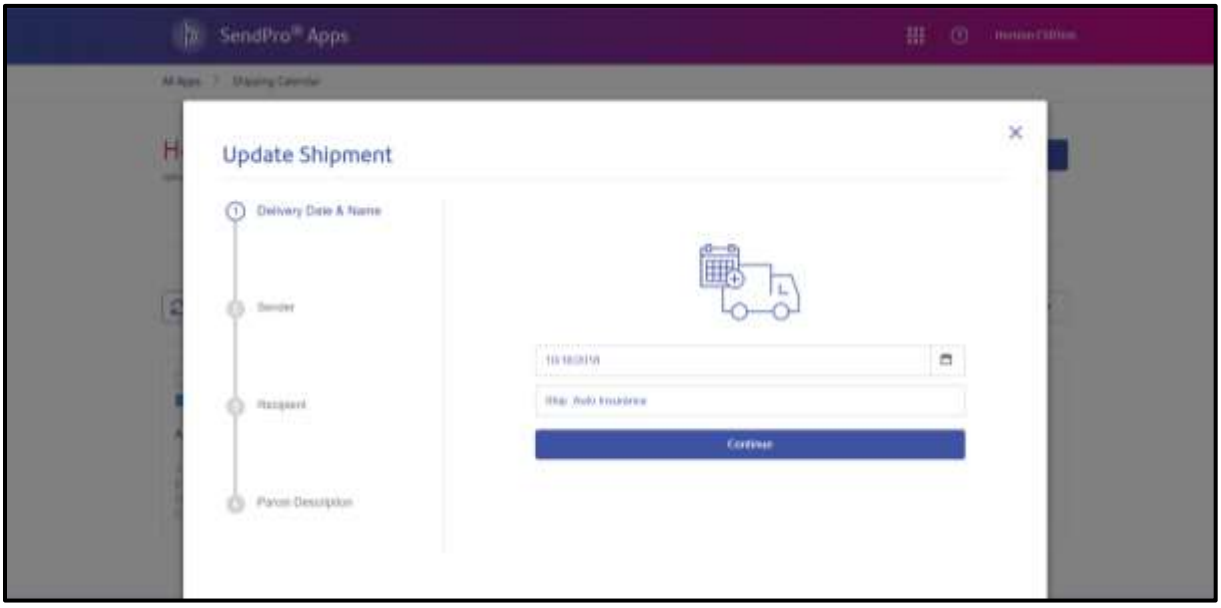


STEP 4: EDITING A SHIPMENT

You can edit a shipment to change the recipient details, target delivery date or the shipment type. To start editing tap on 'Edit' option on the screen next to details of any shipment which is yet to be sent.

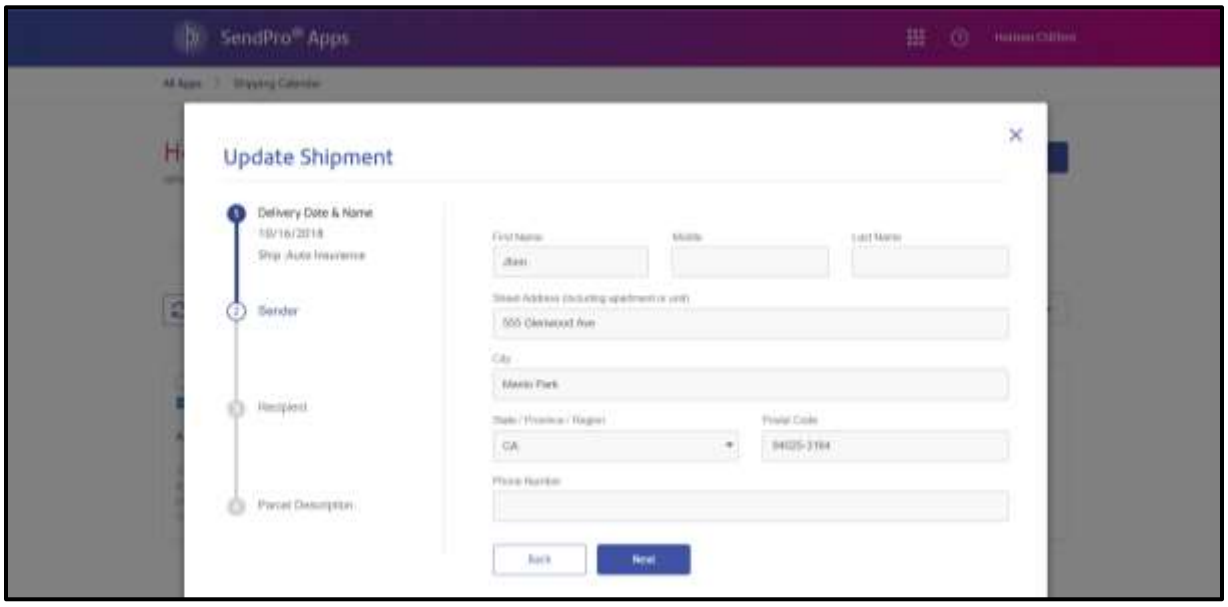
4.1. EDITING DELIVERY DATE

After tapping on 'Edit', you will directed to edit Delivery Date. You can make the required changes in the fields provided and tap on 'Next' to confirm your changes.



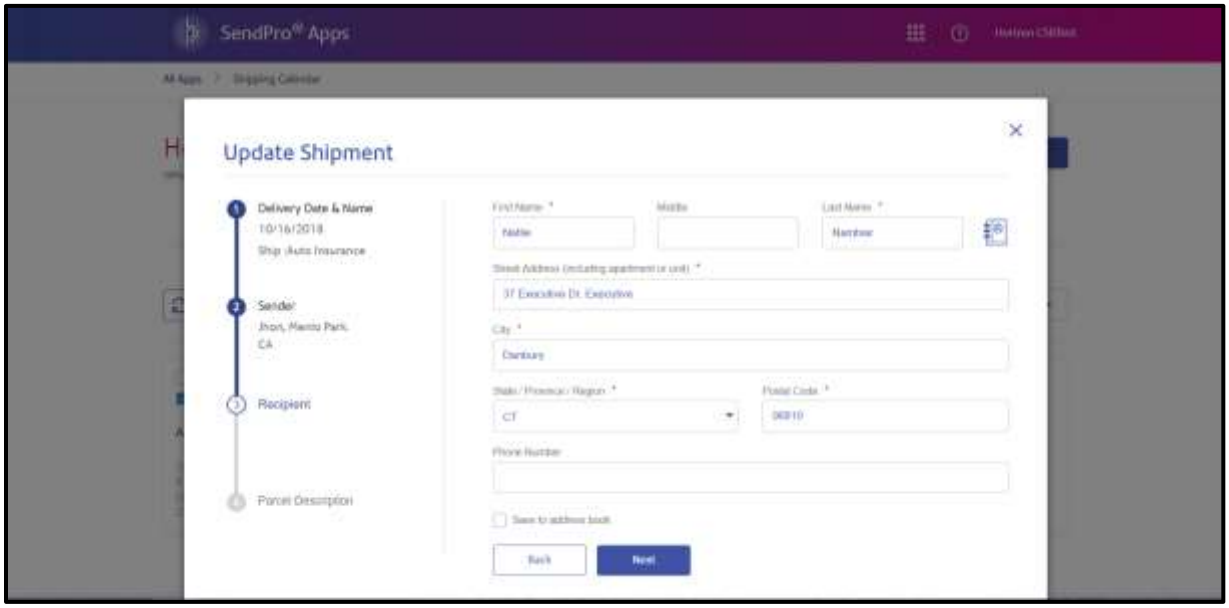
4.2. EDITING SENDER DETAILS

After tapping on ‘Edit’, you will be able to edit Sender’s details. You can make the required changes in the fields provided and tap on ‘Next’ to confirm your changes.



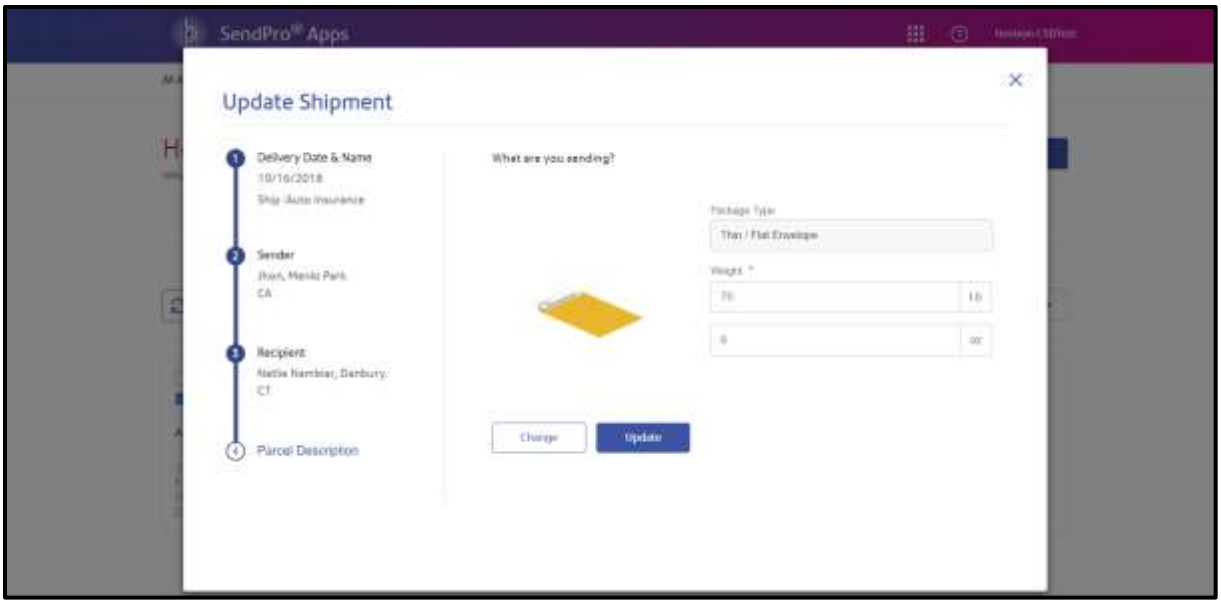
4.3. EDITING RECIPIENT DETAILS

After tapping on ‘Edit’, you will be able to edit Recipient’s details page. You can make the required changes in the fields provided and tap on ‘Next’ to confirm your changes.

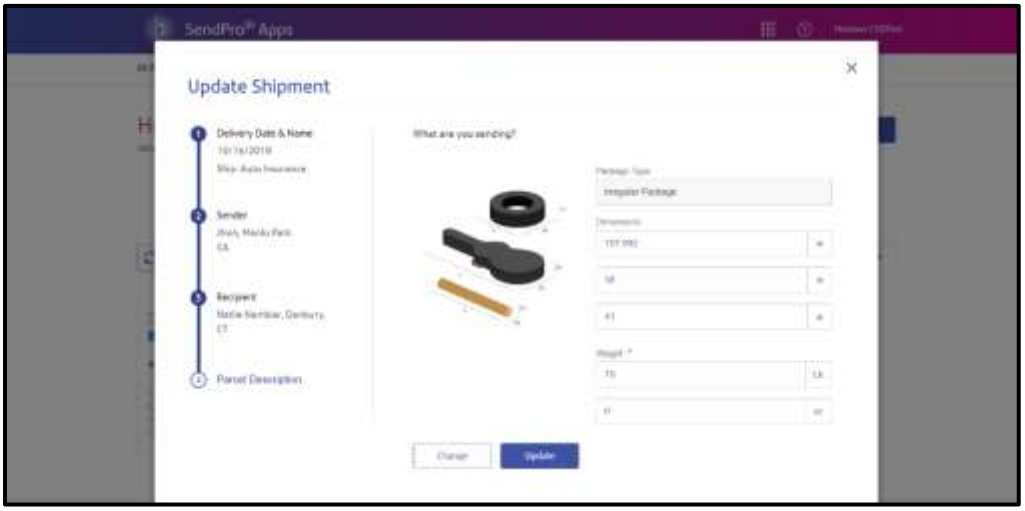


4.4. EDITING PACKAGE TYPE

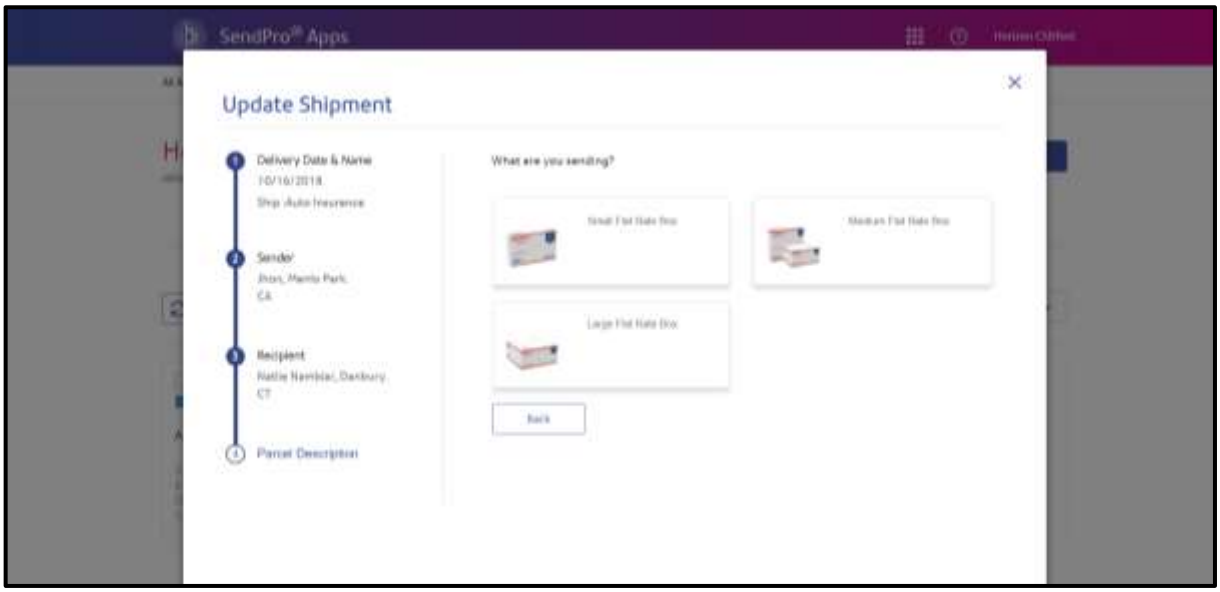
You can select the package type from the options provided. You can select custom packages or pre-defined USPS mail categories. If you wish to send packages with a custom size and weight, select the 'Box or Envelope' option.



You will need to enter dimensions for box or irregular dimension shipments in the fields provided.

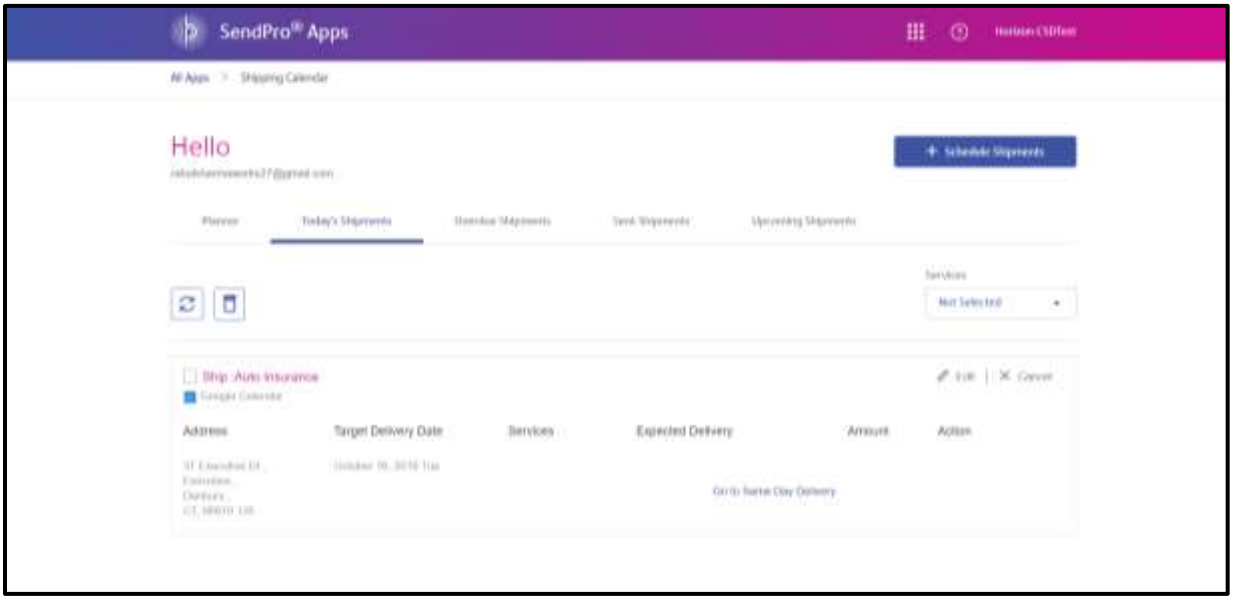


In case you would like to select a predefined USPS category, select the requisite mail or box option to proceed. A list of the available package categories is provided. Select the required option to view the details of the package type and to proceed to entering the weight.



STEP 5: TODAY'S SHIPMENTS

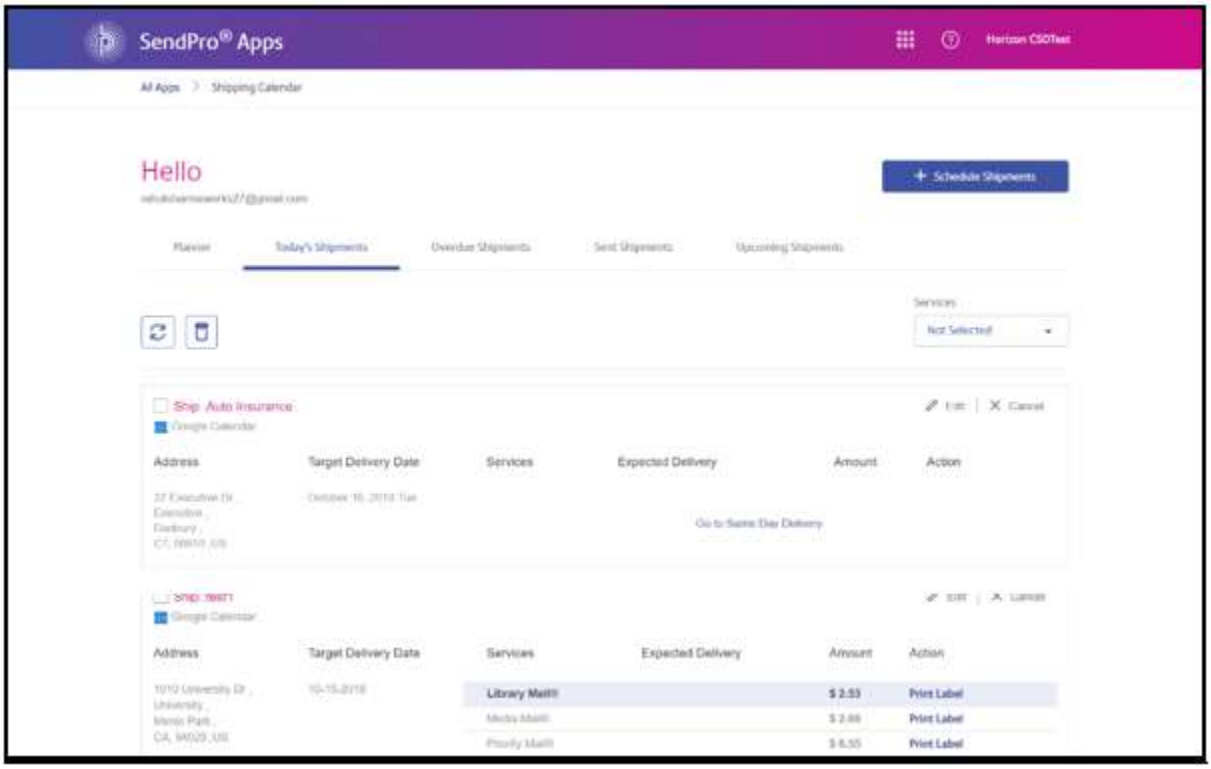
In Today's Shipment, you can view all the shipments scheduled to be shipped on the current day. You can also edit or delete shipments from here. The following screen displays the shipments details, target delivery date, delivery options, estimated delivery date and amount.



A list of shipping options are provided based on the target delivery date. Select your preferred option from the list provided and select 'Yes' to process the shipment. You can also deliver on the same day by availing Deliv services on the Same Day Delivery App. Deliv is a last mile delivery solution that provides same-day delivery services in 35 markets across the United States.

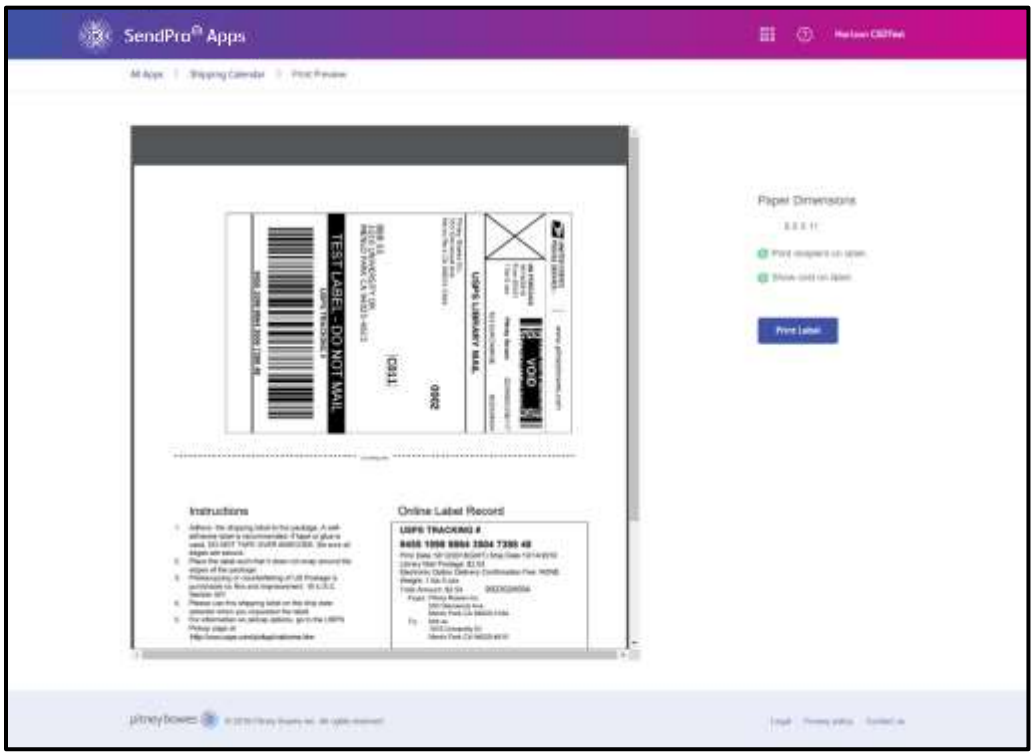
STEP 6: PRINTING LABELS FOR SHIPMENTS

After selecting the required shipping option, tap on the shipment you wish to generate a trackable label for and tap on 'Yes'. On the next screen, you can preview the label along with options for showing the cost and printing a receipt. After you have selected the format and the recipient name, tap on 'Print Label'. You can only print labels for a single shipment at a time.



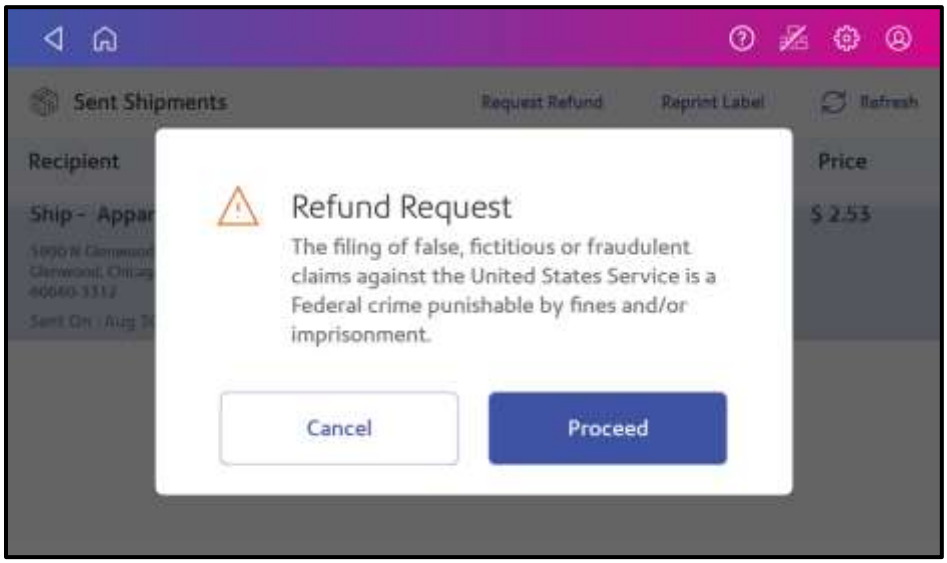
6.1. LABEL PREVIEW

You will then be directed to a preview of the label, tap on 'Print Label' to generate.



6.2. REQUESTING A REFUND

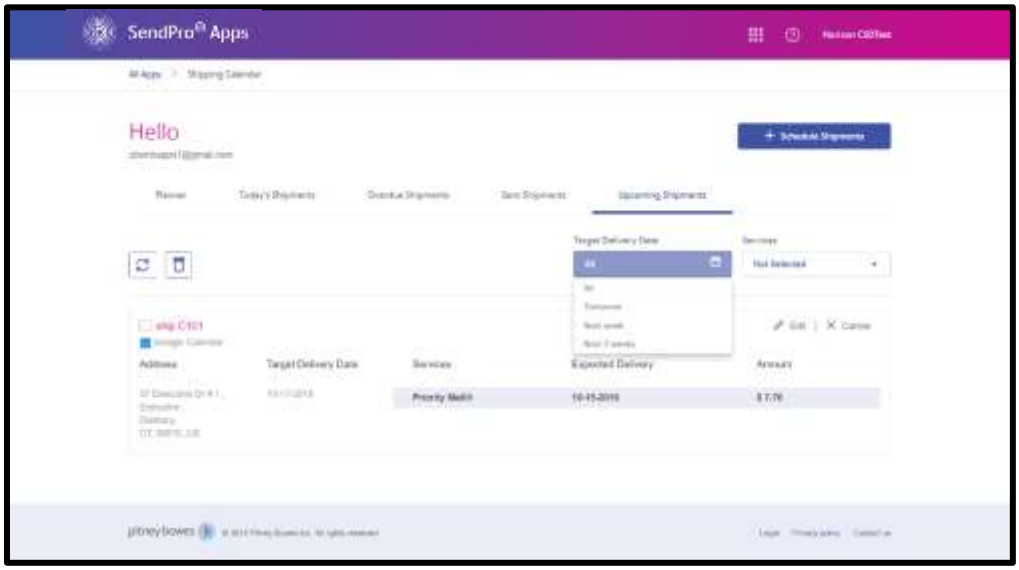
To request a refund for your shipment, tap on the 'Request Refund' button by selecting the shipment you wish to submit a refund.



You will see a refund confirmation message. To request a refund, tap on 'Proceed'. Please note that you can submit refund requests for only those shipments on the 'Sent Shipments' screen for which no more than 24 hours have lapsed since delivery booking.

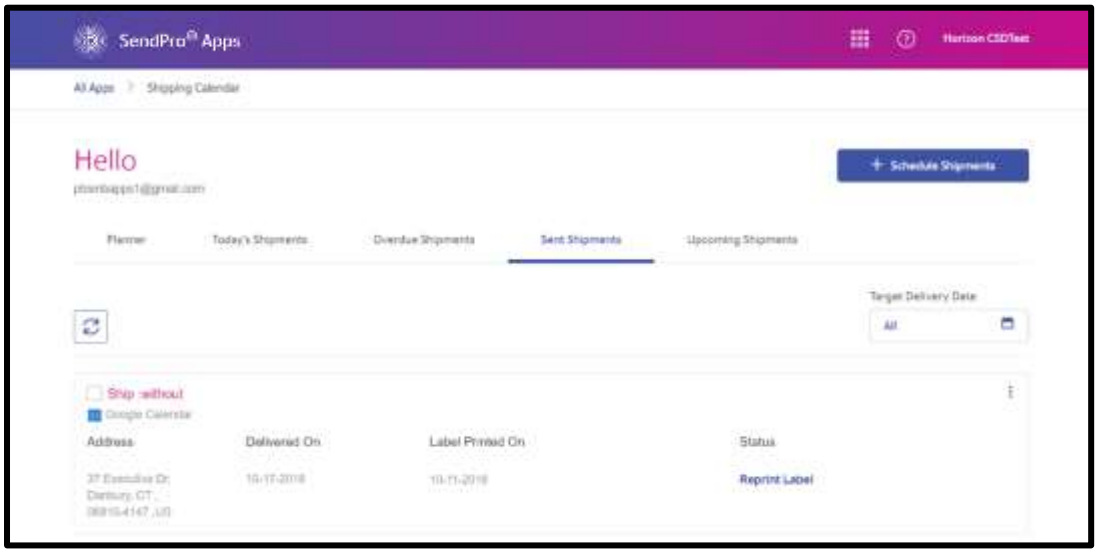
STEP 7: MANAGE UPCOMING SHIPMENTS

Select the range of target delivery date to view your upcoming shipments. A list of shipments based on the shipping date is displayed along with the recipient details, target delivery date and parcel description. Also with the 'Schedule Shipments' button present on the top right-hand side of the screen, you can add new calendar events.



STEP 8: SENT SHIPMENTS

Select sent shipments from the dashboard to view history. You will then be directed to a screen containing details of the shipments, target delivery date, parcel description and the amount.



8.1. REPRINTING A LABEL

You can reprint a shipping label only once within 24 hours of its creation. Select the shipment by tapping on it and tap 'Reprint Label' (as above). You will then be prompted to confirm reprinting of the label, tap 'Proceed' to continue.

STEP 9: PAYMENT

The amount will be automatically charged from the Trackable Labels balance upon printing of the label.

Note: You cannot provide payment details or recharge your postage balance through the Shipping Calendar app.

FREQUENTLY ASKED QUESTIONS

1. General Questions

1.1. I do not use Google Calendar; can I still use Shipping Calendar?

The appl synchronizes with data from Google Calendar. You will need to have a Google account before you can start using the app. During the app's onboarding process, you can create a new Google account by choosing create new google account option.

1.2. Do I need a separate calendar for Shipping Calendar or can it work with my current Google Calendar?

It is recommended that you maintain Shipping events in a separate instance. However, the app can be synced with your current account.

1.3. Which shipping carriers are available in Shipping Calendar?

The app currently supports USPS for scheduling shipments and printing labels. Similar feature for FedEx and UPS may be available in the future.

1.4. Are the same shipping discounts available through shipping calendar?

Yes, the same shipping discounts are available when using Shipping Calendar.

1.5. Is my customer data secure with Shipping Calendar?

Pitney Bowes ensures that no data related to your shipments or customers is stored. Security and privacy of your data priority is our top priority.

2. Onboarding

2.1. How soon can I get started with Shipping Calendar?

The onboarding process for Shipping Calendar is short and simple. Only your Pitney Bowes account details are required and you can start using the app right away after accepting the terms & conditions. As soon as you enter the app you will be prompted to import your shipping events from Google Calendar, tap on 'allow' to import the shipping events and get started with your Shipping Calendar experience.

3. Shipment Scheduling

3.1. Can I view my shipments by date?

Yes, you can view your shipments by date with the dashboard calendar. Simply scroll to the respective date you want to view the shipments for and tap on it.

3.2. Can I deliver a shipment on the same day using Shipping Calendar?

Yes, it is possible to deliver on the same day by using the Same Day Delivery App feature. Along with our carrier partner Deliv you can schedule deliveries for the same day. Based on the pin code provided, the app directly links you to the Same Day Delivery app. You can then ship packages for same day delivery through the app.

Same Day Delivery is a recommended option, only when you do not have a corresponding USPS option to meet your target delivery date. However, you can choose to edit your delivery date from the calendar visible on 'Today's Shipments' screen after tapping 'Edit' button if you wish to plan your delivery for later.

4. View daily shipments

4.1. How can I view my daily shipments?

You can view your daily shipments by tapping on the 'Ship Now' option on the dashboard to display the shipments that are to be shipped today.

5. Edit your shipments

5.1. Can I edit and view my shipment details anytime I want?

Yes, you can view and edit your shipment anytime by scrolling to the shipment's scheduled date you want to view or edit from the dashboard calendar. Then, tap on it to see the list of today's or upcoming

shipments and select the shipment you want to view or edit. The ‘Edit’ button located on the top right side of the screen will come in handy for the same.

5.2. Can I delete an unwanted shipment?

Yes, you can delete an unwanted shipment and remove it from your database permanently by scrolling to the scheduled ship date. Then tap on it from the dashboard and select the shipment you want to delete. You will see a delete icon on the right-hand corner. Tap on the icon to delete the desired shipment.

6. Payments

6.1. How will I be charged for shipping labels?

Payment for printed trackable labels will be charged automatically from your Trackable Labels balance.

6.2. Can I request a refund?

Yes, you can request a refund by going to the ‘Sent Shipments’ option on the dashboard. You can then request a refund for your shipment by tapping on ‘Request Refund’. The shipping label will be considered void and the amount paid will be refunded to your account.

For more information regarding the app, contact us at +1-800-522-0020