Ship Engine Rate Comparator and Shipment Tracking

Zoho CRM Extension

User Manual

Version 1.0

Prepared By:

IT Solution Provider
www.tiaraconsulting.com

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1. Overview

Ship Engine is an American Multinational Courier delivery services Company, Ship Engine business access and deeply discount rates across carriers, validate addresses, process and track Shipment and manage returns. **Ship Engine Rate Comparator and Shipment Tracking** is an extension for the Zoho CRM developed by Tiara, a Zoho Alliance Partner, and available in Zoho Marketplace for all Zoho users to deploy as an extension for Zoho CRM.

Using this extension, Zoho CRM users can easily track your Ship Engine shipment using Ship Engine Tracking Number and Carrier Code within Zoho CRM and also, get the Ship Engine Shipping rate for different delivery options (service type) from within your Zoho CRM account.
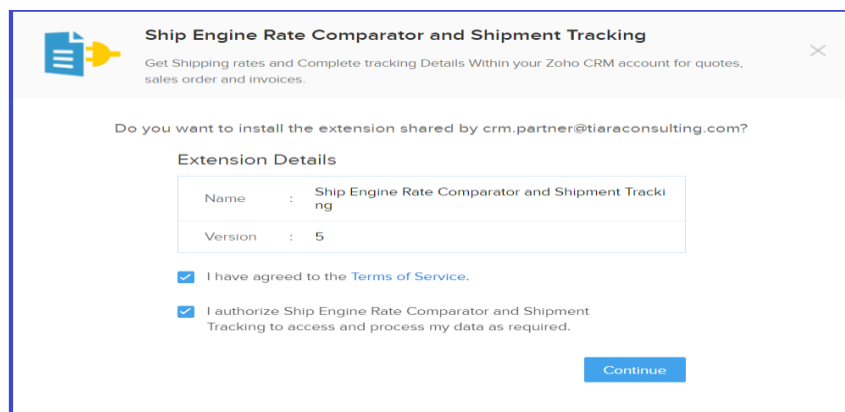
This User Manual document provides step-by-step instructions to install this extension from Zoho Marketplace, how to configure and use the shipment tracking functions within your Zoho CRM account.

1.1. Installing Ship Engine Rate Comparator and Shipment Tracking Extension

Go to Zoho Marketplace and search for "Ship Engine" to locate the extension and install directly from the Marketplace. Alternatively, you can install the Ship Engine extension by logging in to your Zoho CRM account and follow the below installation instructions.

To install the Ship Engine extension from within Zoho CRM:

❖ Go to **Setup** > **Marketplace** > **All**. By default, all the Zoho extensions currently installed within your Zoho CRM account are listed. Go to "**All Extensions" tab** to view all available extensions.
❖ Click **All Extensions,** browse/search for *Ship Engine*, locate (see screenshot below) and then click the extension. The details about the extension will be shown.
❖ Click **Install** button**.**
❖ Make sure you check the "Agree to the **Terms of Service" and** *"Authorize Ship Engine Extension" checkbox* and click **Continue**.

❖ Select one of the Profile of Users for whom you want to install the extension and click **Confirm** as shown in the screenshot below

❖ Specify the *credentials* of your Ship Engine account, Address of your Company / Organization, API key generated within account and click **Save**.
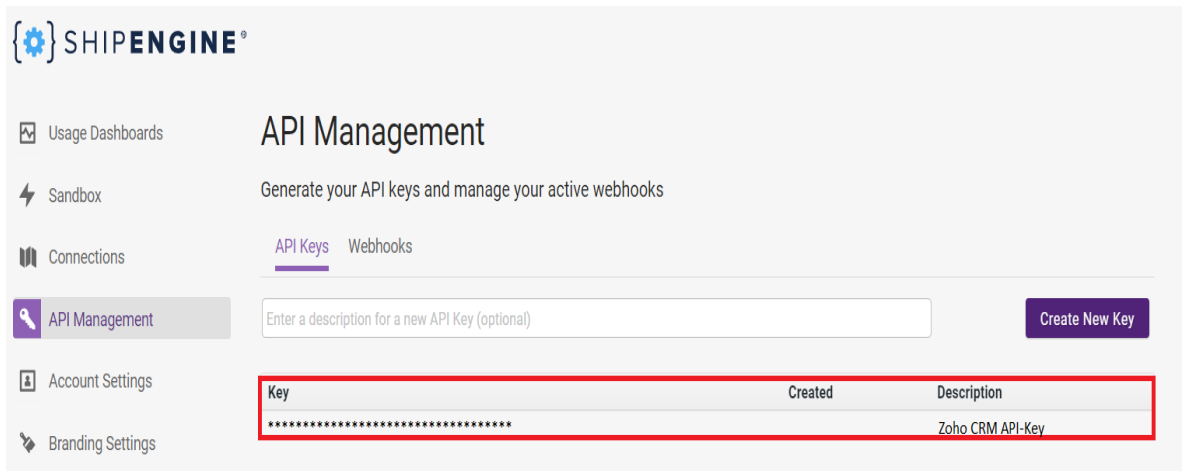
1.2. Finding Your Ship Engine Credentials (mandatory parameters for installing Ship Engine Extension)

To activate the Ship Engine Extension, the below credentials are mandatory.

- ❖ **Email and Password:** This Email and password of your Ship Engine account.
- ❖ **Ship Engine Login:** After Creating the New Ship Engine account, login to the credential (email and password) to display the Ship Engine account page.
- ❖ **Find the Production Key:** After Login to Ship Engine account Go to 'API Management' and click to Create New key for the API Keys in Ship Engine account. The link for corresponding page: https://app.shipengine.com/#/portal/apimanagement
- ❖ **Apply API-Key:** Use this generated API-key during Extension installation process**.**

2. Tracking Ship Engine Shipment

The user can track any shipment by entering Ship Engine tracking number within the Invoice module of Zoho CRM.

2.1. Invoice

In Invoice module, the following custom fields are created after the successful installation of the Extension. Below are the details of the custom fields created by the extension within **Invoice** module.

- ❖ **ShipEngine Tracking Number** : **Text Field**
- ❖ **ShipEngine Tracking Status** : **Multiline Field**
- ❖ **ShipEngine Carrier** : **Drop Down Field**

Enter the **Ship Engine Tracking Number and Choose Ship Engine Carrier** in the custom field and click **SAVE** button. Upon clicking the SAVE button, the shipment tracking information is fetched and displayed on the '**Ship Engine Status**'.

3. Ship Engine Rate Comparator

In addition to tracking the Ship Engine shipment, user can also calculate the Ship Engine shipment rate by providing the following package parameters and also, compare the rate of different options and pick the best option.

- ❖ Weight of the Product
- ❖ Packing Type
- ❖ Validation Address
- ❖ Address of the Addressee
- ❖ Address of the Sender

3.1 Rate Comparator – Within Quotes module

The Ship Engine Rate Comparator functionality is enabled within **Quotes** module of Zoho CRM. Following custom fields are created within Quotes module upon the installation of Ship Engine Extension

- ❖ **ShipEngine Package Weights** : **Decimal Field**
- ❖ **ShipEngine Package Type** : **Dropdown Field**
- ❖ **ShipEngine Service Types** : **Dropdown Field**
- ❖ **ShipEngine Package Unit** : **Dropdown Field**
- ❖ **ShipEngine Validation Address** : **Dropdown Field**
- ❖ **ShipEngine From Address Residential** : **Check box Field**
- ❖ **ShipEngine To Address Residential** : **Check box Field**
- ❖ **ShipEngine Price Breakup Details** : **Multiline Field**
- ❖ **ShipEngine Warehouse** : **Lookup Field**

After entering values for the above custom fields (except Price Breakup field and Service Type field), click **SAVE** button to display the Shipping Rate for each of the available Shipment Options in the '**Ship Engine Price Breakup Detail**' field as shown in the below screenshot. The user can select any one of the available Shipment Option in **Ship Engine Service Type** and the Shipment Cost will be added as a separate line item in the Quote, and the grand total is displayed.

Quote Stage	Draft		Valid Until	—
Team	—		Contact Name	Raj
Carrier	FedEX		Account Name	16w Fabworks (Anthony Cicero)
Created By			Vendor	
			Modified By	
Currency	USD			
Exchange Rate	1		ShipEngine Service Types	FedEx First Overnight®
ShipEngine Package Type	Package		ShipEngine Price Breakup Details	Rate ID : se-357383807 Rate Type : shipment Carrier ID : se-430473 Shipment Amount : 107.8 USD Insurance Amount : 0.0 USD Confirmation Amount : 0.0 USD Other Amount : 8.87 USD Car... Show More
ShipEngine Warehouse	—			
ShipEngine From Address Residential	—			
			ShipEngine validation Address	No Validation
ShipEngine Package Unit	Ounce		ShipEngine To Address Residential	✔
			ShipEngine Package Weights	1

Product Details

#	Product Details	List Price ($)	Quantity	Amount ($)	Discount ($)	Tax ($)	Total ($)
1	laptop (123)	200.00	1	200.00	0.00	0.00	200.00
2	**ShipEngine Shipping Charge** Carrier Name : FedEX Service Type : FedEx First Overnight® Shipment Amount : 107.8 Insurance Amount : 0.0 Confirmation Amount : 0.0 Other Amount : 8.87	116.67	1	116.67	0.00	0.00	116.67

Sub Total	$ 316.67
Discount	$ 0.00
Tax	$ 0.00
Adjustment	$ 0.00
Grand Total	$ 316.67

3.2 Rate Comparator – Within Sales Order module

The Ship Engine Rate Comparator functionality is enabled within **Sales Order** module of Zoho CRM. Following custom fields are created within SO module upon the installation of Ship Engine Extension.

- ❖ **ShipEngine Package Weights** : **Decimal Field**
- ❖ **ShipEngine Package Type** : **Dropdown Field**
- ❖ **ShipEngine Service Types** : **Dropdown Field**
- ❖ **ShipEngine Package Unit** : **Dropdown Field**
- ❖ **ShipEngine Validation Address** : **Dropdown Field**
- ❖ **ShipEngine From Address Residential** : **Check box Field**
- ❖ **ShipEngine To Address Residential** : **Check box Field**
- ❖ **ShipEngine Price Breakup Details** : **Multiline Field**
- ❖ **ShipEngine Warehouse** : **Lookup Field**

After entering values for the above custom fields (except Price Breakup field and Service Type field), click **SAVE** button to display the Shipping Rate for each of the available Shipment Options in the '**Ship Engine Price Breakup Detail**' field as shown in the below screenshot. The user can select any one of the available Shipment Option in **Ship Engine Service Type** and the Shipment Cost will be added as a separate line item in the SO, and the grand total is displayed.

Product Details

#	Product Details	List Price ($)	Quantity	Amount ($)	Discount ($)	Tax ($)	Total ($)
1	laptop (123)	200.00	1	200.00	0.00	0.00	200.00
2	ShipEngine Shipping Charge Carrier Name : FedEX Service Type : FedEx Standard Overnight® Shipment Amount : 69.16 Insurance Amount : 0.0 Confirmation Amount : 0.0 Other Amount : 7.42	76.58	1	76.58	0.00	0.00	76.58

Sub Total	$ 276.58
Discount	$ 0.00
Tax	$ 0.00
Adjustment	$ 0.00
Grand Total	$ 276.58

4. Ship Engine WareHouse – (Custom Module to Create Multiple WareHouses)

Ship Engine extension supports shipping from multiple warehouse addresses and so, the shipment cost can be calculated and added in the Sales Order for shipments from different warehouse.

To enable multiple warehouses, a custom module called "Warehouse" gets added by the Ship Engine extension. This custom module is used to setup and manage the multiple warehouses so that the shipment cost is calculated based on the selected warehouse.

Following screenshot shows how to create a new warehouse. Upon adding new warehouse, it automatically appears in the "Warehouse" drop down field within Sales Order and Quotes module so that shipment cost gets calculated for the selected warehouse.

5. Important Notes

5.1 SalesSignals
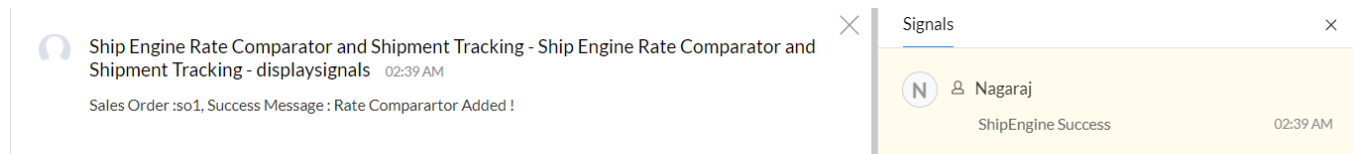
The user will receive the real-time notifications for both the Rate Comparator & Shipment Tracking functionality inside the Zoho CRM as **SalesSignals**. SalesSignals notifications are displayed when you click [the Notifications icon] on the top-right corner of the Zoho CRM home page. The signal will be raised, when there is a value for Contact Name with valid email address.

5.2 State Code and Country Code

In order to calculate the Price Breakup details, it's mandatory to provide the State Code and Country Code as the value in both the Extension Setting page (for State Code and Country Code) and Quotes/SO (for Shipping State and Shipping Country)

Example of State Code:

- For State of Texas, the Code is **TX**
- For State of California, the Code is **CA**

Example of Country Code:

- For United States of America, the code is **US**
- For Australia, the code is **AU**

6. Support Contacts for Ship Engine Extension – Tiara Help Desk

Thank you for installing Ship Engine Extension. If you have any questions or facing installation issues, please contact Tiara Support Desk for Zoho Extensions via email at zohosupport@tiaraconsulting.com or call us at **(925) 218 4080**.

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