

Express Shipping powered by eShipGlobal

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For additional information and FAQs for eShipGlobal, go to the [eShipGlobal information on “It’s Your Yale”](#)

NOTE: The Screen shots in this guide provide COA charging instructions / cost allocations. They are solely intended for instructional purposes and should not be used in your shipments. For questions related to what COA you should use, please contact your supervisor or your business office.

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HOW TO ACCESS/LOG IN

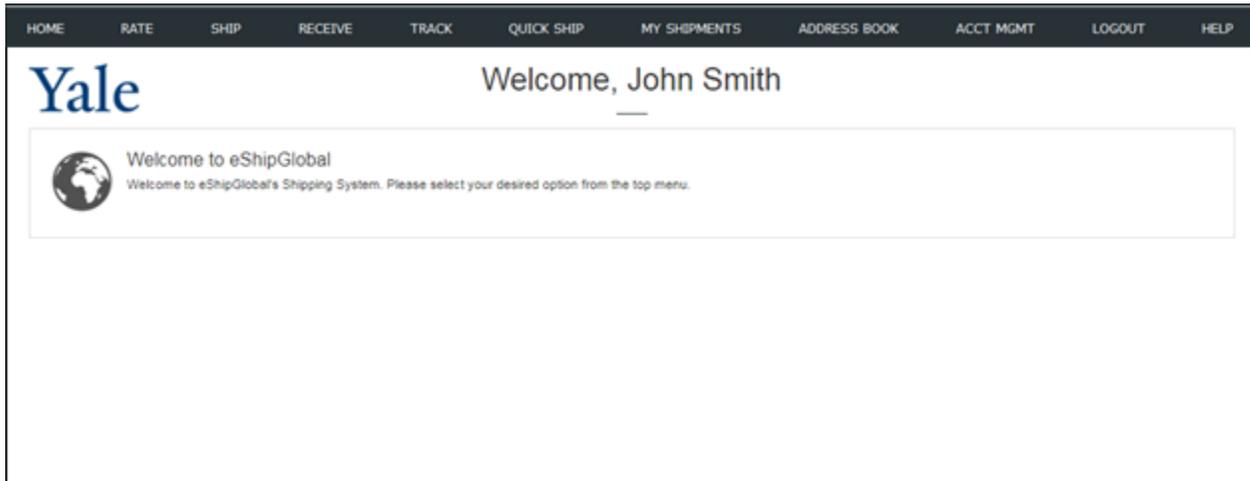
Overview

- To access your eShipGlobal application, simply login with your Yale NetID.
- For additional information and FAQs for eShipGlobal, go to the [eShipGlobal information on "It's Your Yale"](#).

NOTE: If you don't have access to the system or the application denies your login, contact your business office.

Key Points

- Access your eShipGlobal application through the [eShipGlobal page](#).
- Click the link to be automatically logged into your eShipGlobal application.
- After 30 minutes of inactivity, you will automatically be logged out of the eShipGlobal system.



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MAINTAINING USER PREFERENCES

Overview

The Account Management functionality will help you easily maintain shipping preferences in the eShipGlobal system.

For additional information and FAQs for eShipGlobal, go to the [eShipGlobal information on "It's Your Yale"](#).

Key Points

- Default settings for email notifications and package pick-up or drop-off preferences can easily be changed.
- Although these selected options will automatically appear by default for each shipment that you create, preferences can be changed for each individual shipment/order.
- After 30 minutes of inactivity, you will automatically be logged out of the eShipGlobal system.

Maintain User Preferences

1. Click on **Account Management** from the navigation menu located at the top of the eShipGlobal window. Then select **User Preferences**.



Yale

Welcome, John Smith

2. Click to select *Email Notifications* you would like to send or receive.

A form titled "Email Notifications" with the instruction "Check the appropriate checkboxes for default email notifications". It contains three checkboxes: "Notify Shipper on Order", "Notify Recipient on Order", and "Notify Shipper On Delivery". All checkboxes are currently unchecked.

3. Click one of the radio buttons to select your *Package Pickup/Drop-off Preferences*.

A form titled "Package Pickup/Drop-off preference" with the instruction "Please choose Drop-Off or Pick-Up for the default shipping option". It contains three radio buttons: "No Preference", "Drop-Off", and "Pick-Up". The "No Preference" radio button is selected.

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4. Click on **Save Preferences**. Your selection will be saved and you will receive a confirmation message.

Email Notifications
Check the appropriate checkboxes for default email notifications

Notify Shipper on Order Notify Recipient on Order Notify Shipper On Delivery

External Scales Configuration

Use external scales connected to PC on port:

[Read this before attempting to connect and configure your scales](#)

Label Printer Type
Please indicate the printer type for printing airbills. A thermal printer setup user guide is available [here](#).

Laser Printer Thermal Printer (EPL2, ZPL formats)

Thermal printer type:

Thermal Printer Configuration
Enter the name of the thermal printer that's connected to your workstation

Thermal Printer Name: (eg. \\Machinename\printername)

Package Pickup/Drop-off preference
Please choose Drop-Off or Pick-Up for the default shipping option

No Preference Drop-Off Pick-Up

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MANAGING ADDRESS BOOK ENTRIES

Overview

The Address Book stores Recipient and Sender information for easier shipping to commonly used addresses.

For additional information and FAQs for eShipGlobal, go to the [eShipGlobal information on “It’s Your Yale”](#).

Objective

Learn how to add, edit, and delete addresses in your eShipGlobal Address Book so the information is accurate and easily available for shipping packages.

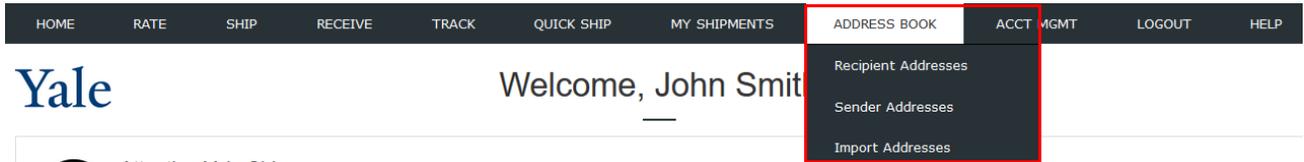
Key Points

- A list of shipping addresses for Recipients and Senders can be maintained in the eShipGlobal Address Book.
 - When shipping a package using the eShipGlobal system, add the frequently used Recipient to the Address Book.
 - Enter Recipient addresses into the Address Book in advance of using them.
 - The recipient address can be added directly from the shipping form while the address is typed, once the “Add to Address Book” check box.
 - You can also maintain multiple Sender addresses. An example is that if you have multiple office locations, you can create a Sender address for each location. You can then select the appropriate Sender address from the Address Books when preparing a Shipment.
 - For inbound shipping labels that do not involve research materials, you will establish your address as a Recipient address.
 - For multiple shipments from the same sender, the recommendation is to utilize the “Collaboration” module.
 - When an address changes or you realize that you have entered and saved the information incorrectly, editing entries is easy.
 - When an entry is no longer required in the Address Book, it can be deleted.
 - The system also allows the bulk import of addresses. The guide and template file is available for download in the system.
- When entering Recipient information to create a shipping label, fields can be filled in on the main form or selected from the Address Book by clicking on the Load from Address Book button.
- After 30 minutes of inactivity, you will automatically be logged out of the eShipGlobal system.

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Manage Address Book Entries

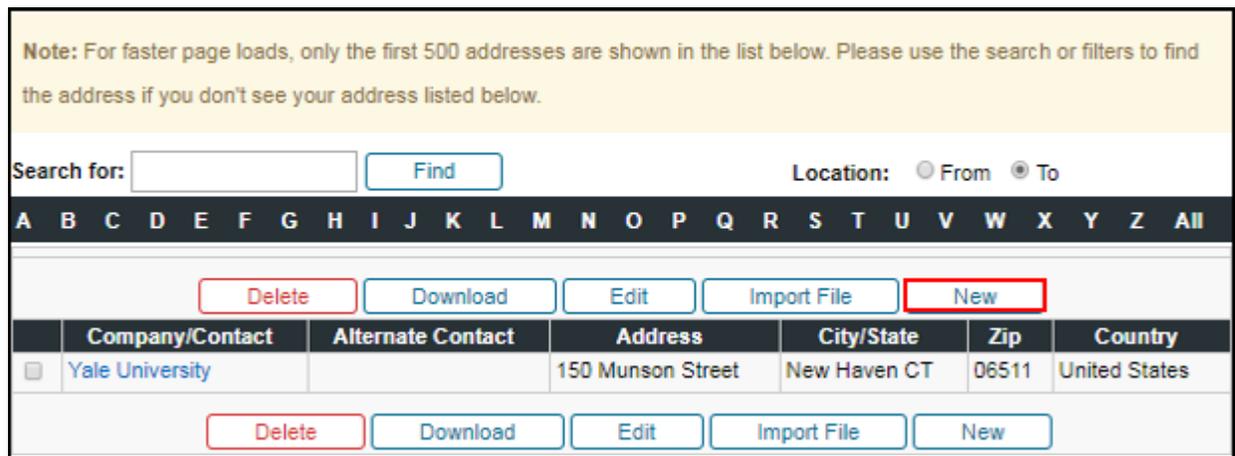
1. Click on **Address Book** from the navigational menu and choose **Recipient Addresses** from the drop-down list.



- The Address Book will display in a new window.

Add new address book entry

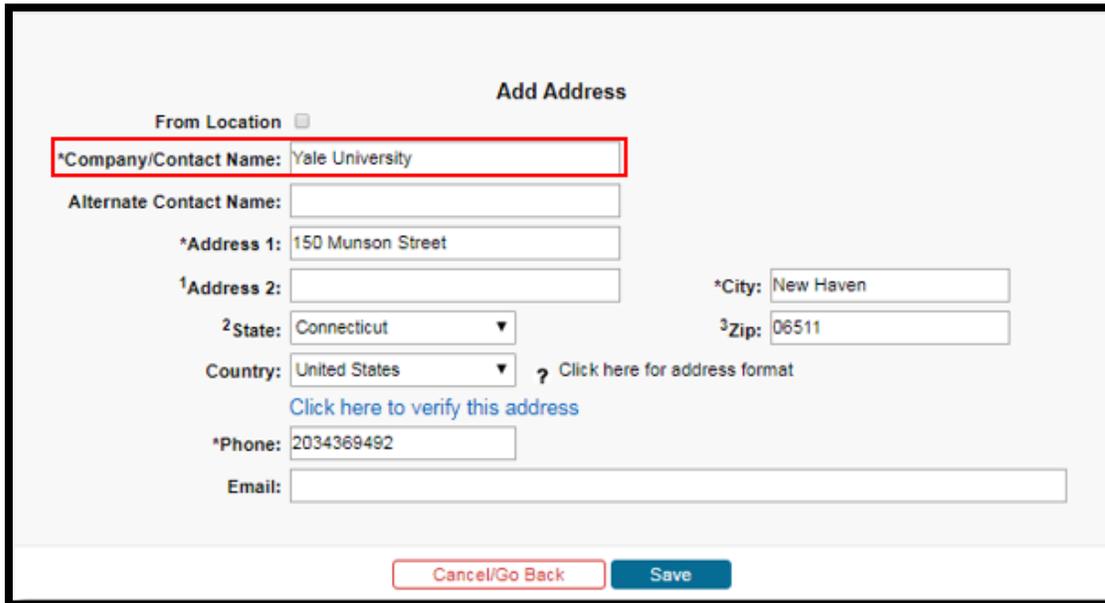
1. Click on **New** to add a new Recipient to the Address Book.



- The **Edit**, **Download**, **Import File**, and **Delete** buttons at the bottom of your Recipient list are also available to help you manage your Address Book.
- Enter information about the new Recipient in the appropriate fields.

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2. Enter the name of the Company or primary Contact in the **Company /Contact Name** box.
 - This is a required field. If the delivery is for a Residential delivery, enter the primary contact name into this field.

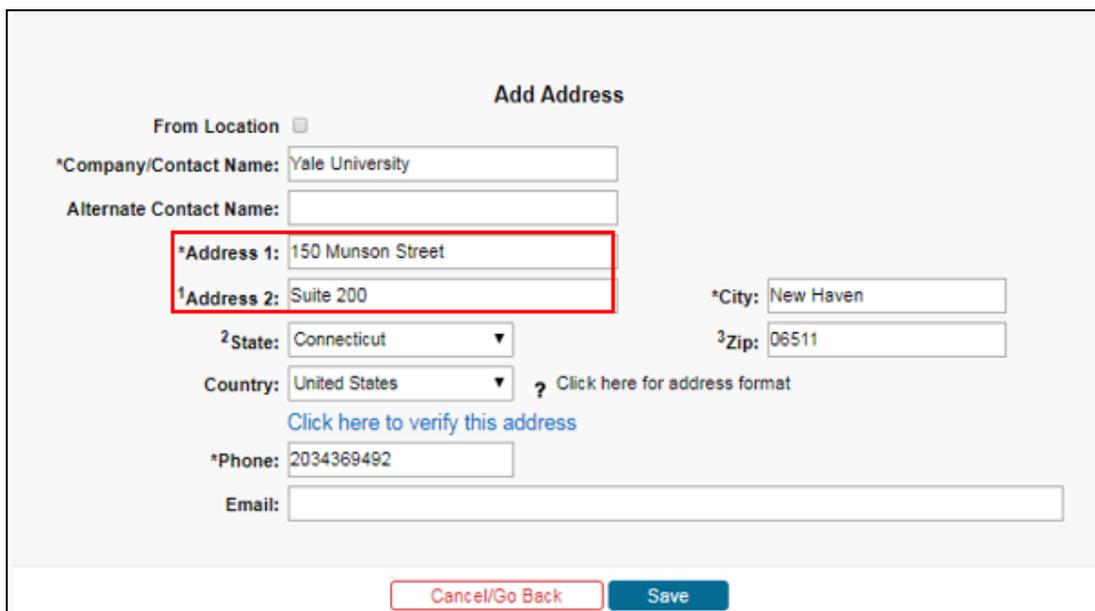


The screenshot shows the 'Add Address' form with the following fields and values:

- From Location**:
- *Company/Contact Name**: Yale University (highlighted with a red box)
- Alternate Contact Name**:
- *Address 1**: 150 Munson Street
- ¹Address 2**:
- *City**: New Haven
- ²State**: Connecticut
- ³Zip**: 06511
- Country**: United States
- [Click here for address format](#)
- [Click here to verify this address](#)
- *Phone**: 2034369492
- Email**:

Buttons:

3. Enter the Contact Name of the Recipient in the **Alternate Contact Name** box.
4. Enter in the Recipient address information using the **Address 1** and **Address 2** fields.
 - Each box can contain up to 35 characters.
 - The **Address 2** field is generally used for department, floor, suite, building information, etc.



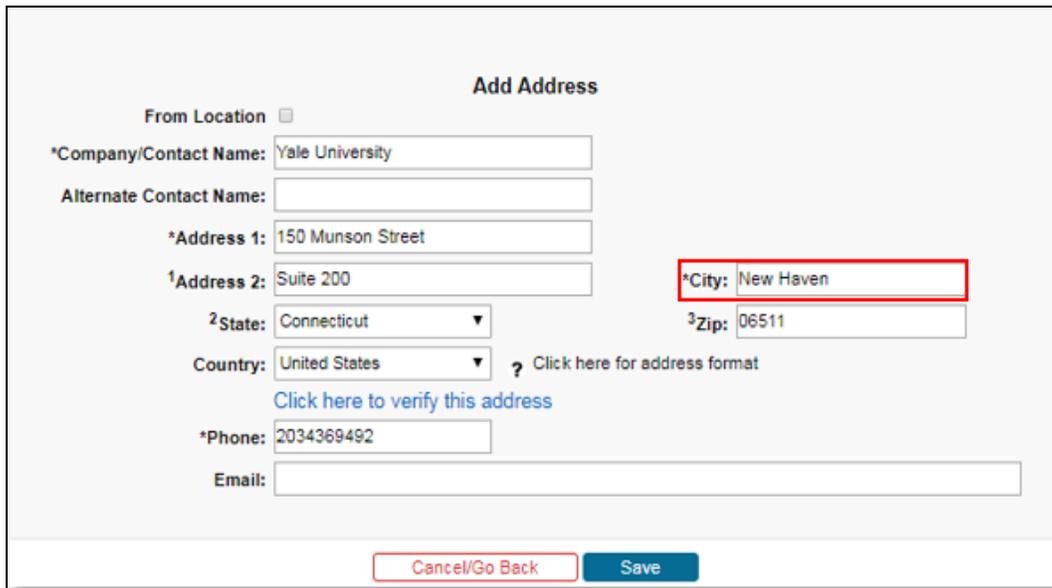
The screenshot shows the 'Add Address' form with the following fields and values:

- From Location**:
- *Company/Contact Name**: Yale University
- Alternate Contact Name**:
- *Address 1**: 150 Munson Street (highlighted with a red box)
- ¹Address 2**: Suite 200 (highlighted with a red box)
- *City**: New Haven
- ²State**: Connecticut
- ³Zip**: 06511
- Country**: United States
- [Click here for address format](#)
- [Click here to verify this address](#)
- *Phone**: 2034369492
- Email**:

Buttons:

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5. Enter the **City**.



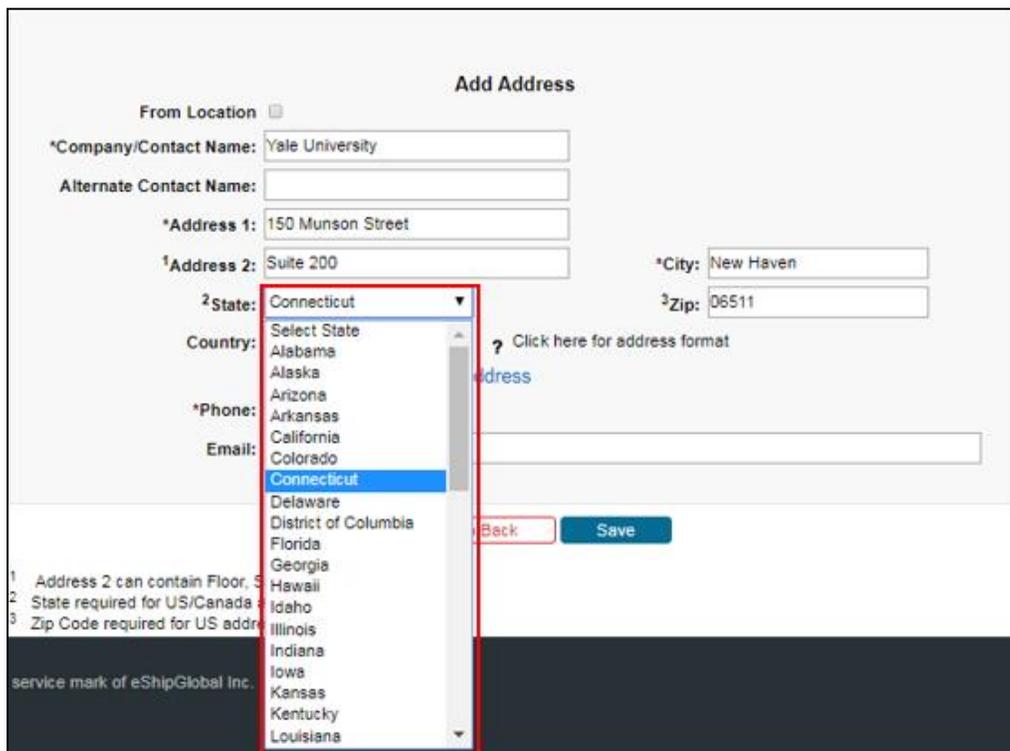
The screenshot shows the 'Add Address' form with the following fields and values:

- From Location:
- *Company/Contact Name: Yale University
- Alternate Contact Name:
- *Address 1: 150 Munson Street
- ¹Address 2: Suite 200
- *City: New Haven (highlighted with a red box)
- ²State: Connecticut
- ³Zip: 06511
- Country: United States
- Click here for address format
- Click here to verify this address
- *Phone: 2034369492
- Email:

Buttons: Cancel/Go Back, Save

6. Click on the drop-down arrow next to **State** to select the appropriate State.

- State is a required field for all deliveries to the United States, Canada, and Mexico.



The screenshot shows the 'Add Address' form with the State dropdown menu open. The dropdown menu lists the following states:

- Select State
- Alabama
- Alaska
- Arizona
- Arkansas
- California
- Colorado
- Connecticut (highlighted)
- Delaware
- District of Columbia
- Florida
- Georgia
- Hawaii
- Idaho
- Illinois
- Indiana
- Iowa
- Kansas
- Kentucky
- Louisiana

The form fields and values are the same as in the previous screenshot. The City field is still highlighted with a red box. The State field is now a dropdown menu with 'Connecticut' selected. The Zip field is 06511. The Country field is United States. The Phone field is 2034369492. The Email field is empty. The buttons are Back and Save.

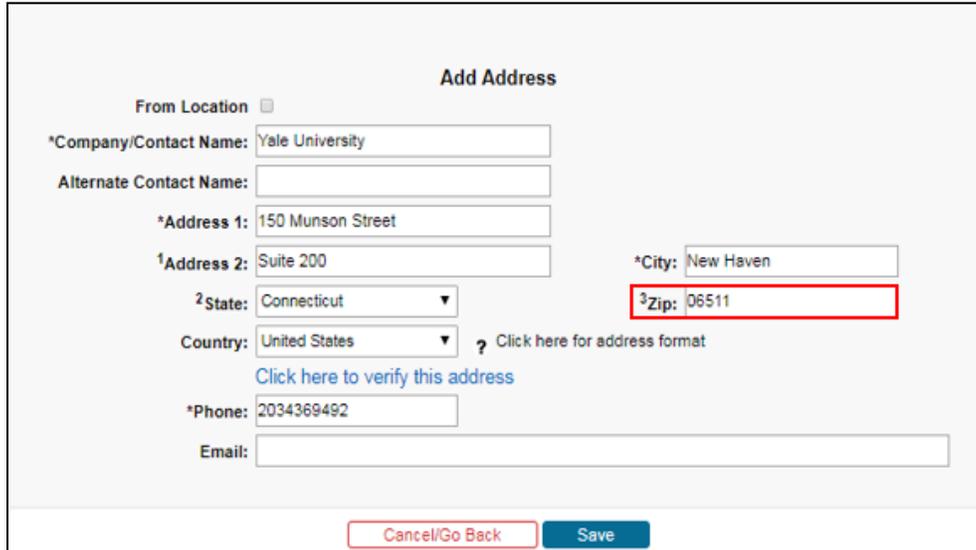
Footnote 1: Address 2 can contain Floor, S
Footnote 2: State required for US/Canada
Footnote 3: Zip Code required for US address

service mark of eShipGlobal Inc.

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7. Enter the appropriate **Zip** code.

- NOTE: Zip codes are required for all destinations within the United States.

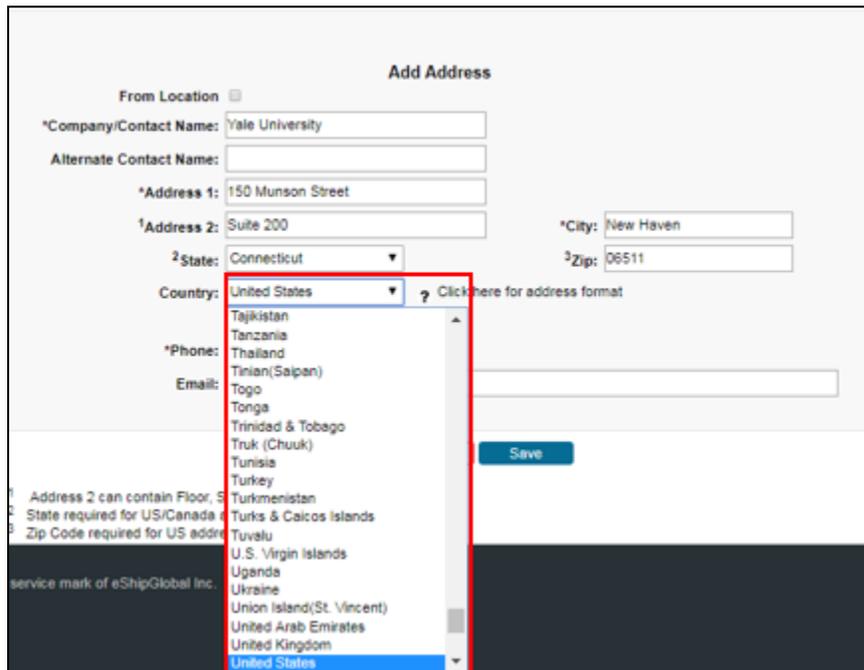


The screenshot shows the 'Add Address' form with the following fields and values:

- From Location:
- *Company/Contact Name: Yale University
- Alternate Contact Name:
- *Address 1: 150 Munson Street
- ¹Address 2: Suite 200
- *City: New Haven
- ²State: Connecticut
- ³Zip: 06511 (highlighted with a red box)
- Country: United States
- *Phone: 2034369492
- Email:

Buttons: Cancel/Go Back, Save

8. Click on the drop-down arrow next to **Country** to select the appropriate Country.



The screenshot shows the 'Add Address' form with the Country dropdown menu open. The dropdown list includes the following countries:

- Tajikistan
- Tanzania
- Thailand
- Tinian(Saipen)
- Togo
- Tonga
- Trinidad & Tobago
- Truk (Chuuk)
- Tunisia
- Turkey
- Turkmenistan
- Turks & Caicos Islands
- Tuvalu
- U.S. Virgin Islands
- Uganda
- Ukraine
- Union Island(St. Vincent)
- United Arab Emirates
- United Kingdom
- United States

The 'United States' option is highlighted in blue. The 'Save' button is visible at the bottom right.

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- Enter the Recipient **Phone** number.
 - Phone number is a required field.

The screenshot shows the 'Add Address' form with the following fields and values:

- From Location:
- *Company/Contact Name: Yale University
- Alternate Contact Name:
- *Address 1: 150 Munson Street
- ¹Address 2: Suite 200
- *City: New Haven
- ²State: Connecticut
- ³Zip: 06511
- Country: United States
- Click here for address format
- Click here to verify this address
- *Phone: 2034369492 (highlighted with a red box)
- Email:

Buttons: Cancel/Go Back, Save

- Click **Click here to verify this address**.
 - This is available for domestic/US addresses only.
 - If address verification fails, you can still attempt to ship to this address.
- Enter the Recipient's **Email**, if available.

The screenshot shows the 'Add Address' form with the following fields and values:

- From Location:
- *Company/Contact Name: Yale University
- Alternate Contact Name:
- *Address 1: 150 Munson Street
- ¹Address 2: Suite 200
- *City: New Haven
- ²State: Connecticut
- ³Zip: 06511
- Country: United States
- Click here for address format
- Click here to verify this address
- *Phone: 2034369492
- Email: john@yale.edu (highlighted with a red box)

Buttons: Cancel/Go Back, Save

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12. Click **Save**, OR click **Cancel/Go Back**.

- You will be brought back to the main Address Book.

Add Address

From Location

*Company/Contact Name:

Alternate Contact Name:

*Address 1:

¹Address 2: *City:

²State: ³Zip:

Country: ? [Click here for address format](#)

[Click here to verify this address](#)

*Phone:

Email:

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Edit or Delete an Address Book Entry

1. To Edit or Delete a saved Recipient:

a) locate the address from within your Address Book or

- Within the Address Book, saved Recipient addresses are listed alphabetically by Company Name. Locate the address by clicking on the letter that begins the Company Name of the address that you are looking for.

The screenshot shows the top part of the Address Book interface. It includes a search box with a 'Find' button, a 'Location' dropdown set to 'To', and an alphabetical navigation bar (A-Z and All). Below the navigation bar are five buttons: 'Delete', 'Download', 'Edit', 'Import File', and 'New'. The 'Delete' button is highlighted with a red box.

b) Enter your Search criteria in the Search box, and click **Find**.

The screenshot shows the same Address Book interface as above, but with 'Yale' entered in the search box. The 'Find' button is highlighted with a red box. The 'Delete' button is also highlighted with a red box.

- From the Address Book window, you can use the Search feature to locate the shipping Recipient. For example, you can enter Search criteria into the Search box and find associated results in the Company name, any part of the address, a particular city, First Name, Last Name, State, Zip Code, etc.

2. Click in the box located next to the Recipient address that you would like to Edit or Delete to select it.

a) To edit, you can also simply click on the name displayed in the "Company/Contact" column.

The screenshot shows the Address Book interface with a table of recipients. The table has columns: Company/Contact, Alternate Contact, Address, City/State, Zip, and Country. The first row is 'Yale University' with address '150 Munson Street Suite 200', 'New Haven CT', '06511', and 'United States'. A checkbox in the first column is checked and highlighted with a red box. The 'Delete' button is also highlighted with a red box.

	Company/Contact	Alternate Contact	Address	City/State	Zip	Country
<input checked="" type="checkbox"/>	Yale University		150 Munson Street Suite 200	New Haven CT	06511	United States

3. If you want to update the information, click on **Edit**.

The screenshot shows the same Address Book interface as above, but with the 'Edit' button highlighted with a red box. The 'Delete' button is also highlighted with a red box.

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4. Update the necessary information.
5. Click **Save Changes** to keep the new information that you entered or click **Cancel/Go Back** to discard your changes.

From Location

Add Address

*Company/Contact Name: Yale University

Alternate Contact Name:

*Address 1: 150 Munson Street

*Address 2: Suite 200

*City: New Haven

^State: Connecticut

^Zip: 06511

Country: United States ? Click here for address format

[Click here to verify this address](#)

*Phone: 2034369492

Email: john@yale.edu

Cancel/Go Back Save

6. Click **Click here to verify this address**.
 - a) This is available for domestic/US addresses only.
 - b) If address verification fails, you can still attempt to ship to this address.

Delete an Address from the Address Book

1. To permanently Delete the selected Recipient address from the Address Book, click **Delete**.
2. Click **Yes, Delete**.
 - To cancel the Delete request click No, Do Not Delete.
 - You will be brought back to the main Address Book window.

Address Book

Delete Address

Do you really want to delete the following item(s) from your address book?

Yale University

No, Do Not Delete Yes, Delete

NOTE: There may be several entries for one company. Only the record that you selected will be deleted.

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ACCOUNT MANAGEMENT: HOW TO CREATE CHARGING INSTRUCTION (COA) PROFILES

Overview

Use this chapter to learn how to add and manage your Charging Instruction Profiles.

For additional information and FAQs for eShipGlobal, go to the [eShipGlobal information on "It's Your Yale"](#).

Key Points

- eShipGlobal provides one easy-to-use interface to create shipping labels for FedEx, UPS, and USPS (flat rate shipping). This third-party service allows you to review shipping costs at Yale contracted rates and choose the most cost-effective shipping solution.
- Using the eShipGlobal application ensures the proper purchasing protocol is followed by using online validation of the Yale charging and Requester on every transaction. Each transaction is tied back to Yale Financial Statements through the tracking number and charging and Requester.
- After 30 minutes of inactivity, you will automatically be logged out of the eShipGlobal system.

Shipping Carriers

Contracted domestic rates are available with FedEx, UPS, and USPS.

- Yale now has contracted rates for USPS Priority Mail Flat Rate Shipping in medium-sized boxes (11" x 8-1/2" x 5-1/2" or 13 5/8 x 11 7/8 x 3 3/8) and carrier envelopes (12-1/2" x 9-1/2").
- Federal Express and UPS will commonly appear within your shipping carrier option list while USPS will only appear when Carrier Letter or Carrier Box is selected from the packaging Type selection in the Package Information section.

Packaging

When selecting Custom Packaging as the packaging Type, provide approximate weights and container sizes.

- All packages are weighed and measured by the shipping vendor selected; prices will be adjusted according to the carrier if necessary.

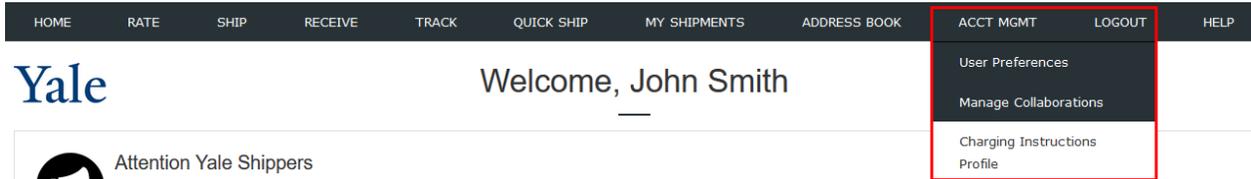
Special Arrangements and Services

- Please note that with some shipping Carriers, additional charges may be incurred if you make special arrangements to have packages picked up.
- Adding Special Services, like Saturday delivery, Residential Delivery, Signature Required, etc. may result in additional charges with the shipping Carrier you select.
- Special Services and may not be available from all Carriers.

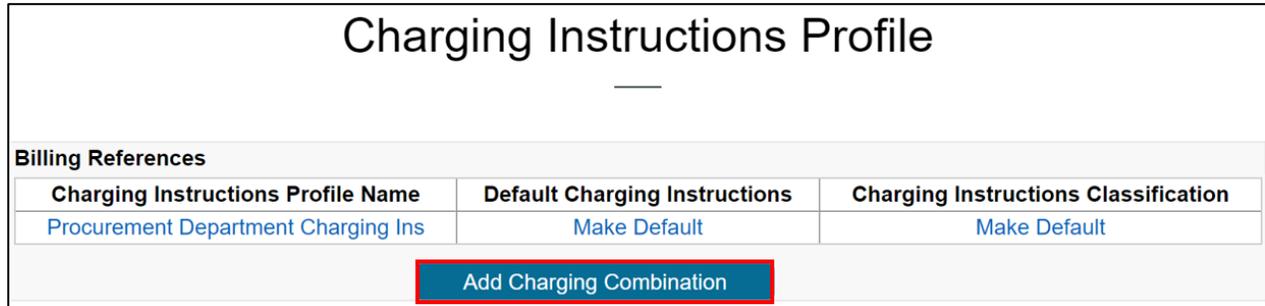
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Creating a Charging Instructions (COA) Profile

1. At the top of your eShipGlobal window, under Account Management, click on **Charging Instructions Profile**.



2. To add a new profile, select **Add Charging Combination**.



3. Enter or select the COA charging instructions that indicate to where the shipping costs should be charged.

The screenshot shows the 'Charging Instructions Profile' form. The form has a table at the top with three columns: 'Charging Instructions Profile Name', 'Default Charging Instructions', and 'Charging Instructions Classification'. The first row contains 'Procurement Department Charging Ins', 'Make Default', and 'Make Default'. Below the table, there is a section for 'Billing References' with a table. The table has three columns: 'Charging Instructions Profile Name', 'Default Charging Instructions', and 'Charging Instructions Classification'. The first row contains 'Procurement Department Charging Ins', 'Make Default', and 'Make Default'. Below the table, there is a section for 'Charging Instructions Profile Name' with a red border. The form contains the following fields: '*Charging Instructions Profile Name:', '*Company: CO01', 'Yale University', 'Grant:', 'Gift:', 'Yale Designated:', '*Cost Center:', '*Program:', '*Project:', 'Assignee:', 'Spend Category: SC204', 'Freight Shipping and Delivery', and '*Requester:'. At the bottom of the form, there is a blue button labeled 'Add'.

NOTE: Enter Grant information or Gift information or Yale Designated.

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4. When you have completed entering your Charging Instructions, click **Add**.

*Charging Instructions Profile Name:	Finance Business Sys	
*Company:	CO01	Yale University
Grant:		
Gift:		
Yale Designated:	YD000002	General Appropriations - Central Program Support
*Cost Center:	CC0047	FBOFIN Business Solutions
*Program:	PG00032	Research (21)
*Project:	PJ000001	General Project
Assignee:		
Spend Category:	SC204	Freight Shipping and Delivery
*Requester:	13701189	Minior, Przemyslaw Thomas -- CC0047 FBOFIN B

[Add](#)

NOTE: Requester will not be saved in a COA profile. For every shipment, you will need to indicate who requested the shipment.

5. Once your profile has been added, you will be able to see the new profile in your Billing References table.

Billing References		
Charging Instructions Profile Name	Default Charging Instructions	Charging Instructions Classification
Finance Business Systems - COA	Make Default	INBOUND
Procurement Department Charging Ins	Make Default	Make Default

[Add Charging Combination](#)

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Edit or Update Charging Instructions

1. To Edit or Update your Charging Instructions, click on the appropriate profile to edit.

Billing References		
Charging Instructions Profile Name	Default Charging Instructions	Charging Instructions Classification
Finance Business Systems - COA	Make Default	INBOUND
Procurement Department Charging Ins	Make Default	Make Default

[Add Charging Combination](#)

2. Edit your Charging Instructions, as needed, and click **Save Changes**.

- Charging Instructions Profile Name
- Company
- Grant
- Gift
- Yale Designated
- Cost Center
- Program
- Project
- Assignee
- Requester

*Charging Instructions Profile Name:	Procurement Departm	
*Company:	CO01	Yale University
Grant:		
Gift:		
Yale Designated:	YD000002	General Appropriations - Central Program Support
*Cost Center:	CC0075	FBOPRO Procurement
*Program:	PG00400	Program TBD [P1Placeholder] (51)
*Project:	PJ000001	General Project
Assignee:		
Spend Category:	SC204	Freight Shipping and Delivery
*Requester:	10930427	Bores, Robert B -- CC0047 FBOFIN Business Solt

[Save Changes](#)

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Add a COA Profile From a Shipping Form

1. From the Shipping Form, select **Save Profile**.
2. Enter a Profile Name and fill out the Charging Instructions. Your new profile will be added to your Charging Instructions drop down once a shipment is created.

Cost Allocation
Select a Charging Instructions:

Save Profile **Charging Instructions Profile Name:**

- All transactions must specify a Grant or Gift or Yale Designated.
- Company, Cost Center, Program, Project, and Requester are required on all transactions.
- Assignee is optional.
- You may either enter the charging segment code (e.g., CC0501 for Cost Center) or search for it by name (e.g., "Physics" will present a list of all cost centers that include "Physics" in the name).
- If you are preparing the transaction on behalf of someone else, specify that person by last name as the Requester. Otherwise, specify yourself as the Requester.

*Company:	<input type="text" value="CO01"/>	<input type="text" value="Yale University"/>
Grant:	<input type="text"/>	<input type="text"/>
Gift:	<input type="text"/>	<input type="text"/>
Yale Designated:	<input type="text" value="YD000020"/>	<input type="text" value="Student Loan Nursing 30003a"/>
*Cost Center:	<input type="text" value="CC1505"/>	<input type="text" value="FASMCD Research Unit"/>
*Program:	<input type="text" value="PG00032"/>	<input type="text"/>
*Project:	<input type="text" value="PJ000001"/>	<input type="text"/>
Assignee:	<input type="text"/>	<input type="text"/>
Spend Category:	<input type="text" value="SC204"/>	<input type="text" value="Freight Shipping and Delivery"/>
*Requester:	<input type="text" value="10930427"/>	<input type="text"/>

NOTE: Enter Grant information or Gift information or Yale Designated

NOTE: Requester will not be saved in a COA profile. For every shipment, you will need to indicate who requested the shipment.

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HOW TO MANAGE COLLABORATIONS

Overview

Use this chapter to learn how to manage collaborations. These are for inbound shipments for Research and non-Research materials, both Domestic and International.

For additional information and FAQs for eShipGlobal, go to the [eShipGlobal information on "It's Your Yale"](#).

Key Points

eShipGlobal provides the ability to set up non-Yale recipients as Collaborators. Collaboration allows for more details to be associated with a recipient than is available in the address book, and allows shipments to Yale to be generated by the non-Yale collaborator.

- Save a COA profile to the the collaboration. Note: you can only save one COA profile to a collaboration, but you can change it, as needed.
- Save multiple "Ship To" addresses from the address book to allow sending to select one or many, at time of shipping.
- Shipping labels/Airway Bills can now be generated by non-Yale colleagues through eShipGlobal collaboration.
- Using the eShipGlobal application ensures the proper purchasing protocol is followed by using online validation of the Yale Charging Instructions (COA values) and Requester on every transaction. Each transaction is tied back to Yale Financial Statements through the tracking number, charging instructions, and Requester.
- After 30 minutes of inactivity, you will automatically be logged out of the eShipGlobal system.

When to Add a Collaborator

- Research materials need to be shipped to and/or returned to a Yale recipient.
- For frequent inbound shipping to Yale, research or non-research, domestic and international
- For On-going Shipping relationships

Important Notes

- You must have COA Profile created and saved before initiating a collaboration.
- Research Materials being shipped to Yale locations require a recipient to have the appropriate training (at the time of the creation of the shipment) to receive the shipment.
- Collaboration for return shipping assists with compliance requirements.
- Where possible, inbound research material should be shipped through collaboration.
- Non-Yale Collaborators have a limited version of eShipGlobal, and will not see confidential information nor COA details.
- If you review reports under "My Shipments", shipments to Yale from collaborators are marked as inbound.

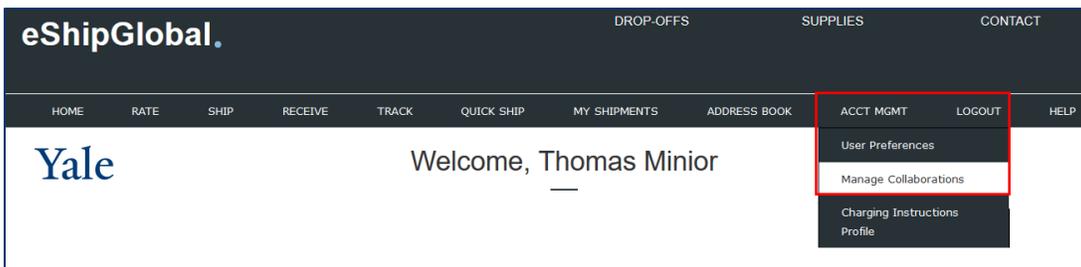
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How to Manage Collaborations: Adding a Collaborator

1. At the top of your eShipGlobal window, click on **RECEIVE**.



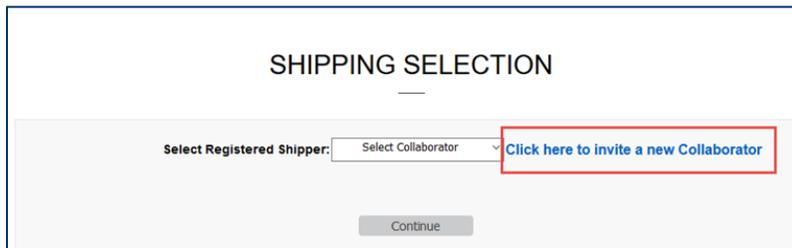
- Or click on Manage Collaborators under Acct Mgmt.



NOTE: You must have COA Profile saved before initiating a collaboration.

2. Click on **Click here to invite a new Collaborator**.

- For an existing Collaborator that you worked with before, you can select that collaborator from the "Select Collaborator" dropdown and move to step number 7.



NOTE: If the invitation was sent out but the Collaborator has not registered yet, the Yale person will not be able to proceed and initiate the inbound shipment. The Collaborator will not show up on the list of Registered Shippers until successfully registers.

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3. Complete the information on the Collaborator Invitation and click on **Send Invitation**.

Collaborator Invitation

NOTE: All collaborations require valid billing codes for cost allocation. Please [click here](#) to add at least one billing code profile before proceeding with the collaborator invitation.

Collaborator Invitation

*First Name:

*Last Name:

*Email:

*Number of Shipments:

*Payment Method:

Allowed Workflows

Non Research Material Shipping Research Material Shipping

[Send Invitation](#)

4. The system will display your confirmation.

Collaborator Invitation

Invitation sent successfully

NOTE: All collaborations require valid billing codes for cost allocation. Please [click here](#) to add at least one billing code profile before proceeding with the collaborator invitation.

Collaborator Invitation

*First Name:

*Last Name:

*Email:

*Number of Shipments:

*Payment Method:

Allowed Workflows

Non Research Material Shipping Research Material Shipping

[Send Invitation](#)

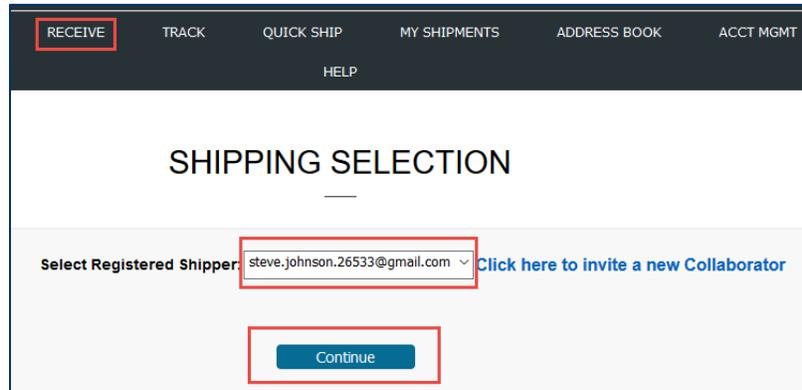
Collaborator List

	Collaborator Name and Email	Collaboration Status	Shipment Limit	Non Research Material Shipping	Research Material Shipping	Associated Billing Reference	Collaboration created on
Details	Steve Johnson (steve.johnson.26533@gmail.com)	Pending Re-send Invitation/Activation Email Delete Collaboration	2	Y	Y	MEDLAB charging instructions	7/31/2020

- As mentioned earlier, you cannot proceed with the inbound shipment till the Collaborator registers. (From the screen above which can be also accessed by Yale user by clicking on “ACCT MGMT” and then on “Manage Collaborators”.) At this point, the Yale user can Resend the invitation or delete the collaboration.

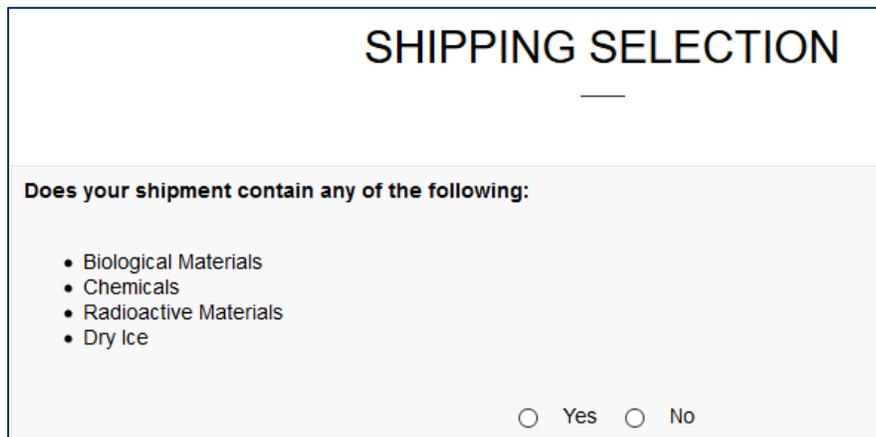
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5. The system sends out the email notification to the Collaborator – Invitation to Ship with instructions on how to register.
6. Once the Collaborator registers successfully, the system will send an email to the Yale user informing that the Collaborator successfully registered and the Yale user can go-ahead and create the inbound shipment.
7. You can now click the **RECEIVE** button again and now the Collaborator will appear on the list of registered shippers.



The screenshot shows the 'SHIPPING SELECTION' page. At the top, there is a navigation bar with buttons: RECEIVE (highlighted with a red box), TRACK, QUICK SHIP, MY SHIPMENTS, ADDRESS BOOK, and ACCT MGMT. Below the navigation bar is a 'HELP' link. The main heading is 'SHIPPING SELECTION'. Underneath, there is a section titled 'Select Registered Shipper' with a dropdown menu showing 'steve.johnson.26533@gmail.com' (highlighted with a red box). To the right of the dropdown is a link: 'Click here to invite a new Collaborator'. Below this section is a 'Continue' button (highlighted with a red box).

8. After clicking **CONTINUE**, the next steps will be the same as during the creation of any outbound shipments.



The screenshot shows the 'SHIPPING SELECTION' page. The main heading is 'SHIPPING SELECTION'. Below the heading is a section titled 'Does your shipment contain any of the following:'. Underneath this section is a list of items:

- Biological Materials
- Chemicals
- Radioactive Materials
- Dry Ice

At the bottom of the section are two radio buttons: 'Yes' and 'No'.

- Please note, that there will be no question whether this is a domestic or an international shipment. This will be already determined by the address the Collaborator entered during the registration process.

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9. After answering the questions, the shipping form will appear.

Step 3 : Shipment Creation and Documentation

Recipient Information
(Select a receiver from the dropdown list)

Yale University, Thomas Minor **Shipping Date:** 07/31/2020 (MM/DD/YYYY)

Note:
- If you would like to "receive this research material", please click on Add Receiver and once you add, choose it from the drop down menu of addresses. Ensure on the receiver's address, you select your own address to proceed.

Sender Information
If the shipper's address needs to be edited, kindly contact the collaborator and have them update their address information by accessing the user profile link available upon login to their eShipGlobal account.

Company/Location	Contact	Address	City/State	Zip
Steve Johnson	Steve Johnson	300 GEORGE ST SUITE 5	NEW HAVEN CT	06511

- Please note, the address of the sender – Collaborator will populate. You can not edit their address (the sender's address)
- The recipient's address is populated from the user's default address. For the Research Material Shipments, the system does not allow to make changes to the address except to the following fields: Address Line 1, Address Line 2, City and ZIP code. Those fields are locked from editing due to the compliance. Those restrictions are not present on the non-Research Material Shipments.

10. Complete all required information, select the COA profile, and select the shipping method. After clicking on **Ship**, the following message is presented:

Please find below summary of your shipment(s). Please follow the instructions given below to cancel shipments.

- **To Cancel a Shipment:** Please select the checkbox next to the tracking number that you wish to cancel and click the **Cancel Shipment** button. Once your label has been cancelled, you will see 'X' in the left column on the label page below. Packages can be cancelled only on the same day that they were created. Please contact support to cancel packages that were created earlier than today that were never used.

Thank you for submitting this inbound shipment request. We have notified your collaborator steve.johnson.26533@gmail.com and you will receive a confirmation email once they process this request.

- At the same time, the system sends two emails to the Collaborator: one is the notification about the shipment and the second with the URL and login instructions.

11. Once the Collaborator completes the shipment, the system sends two email to the Yale recipient: the acknowledgement and the recipient notification.

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How to Manage Collaborations: Edit or Update

1. To edit or update your collaboration, click on the **Details** link.

	Collaborator Name and Email	Collaboration Status	Shipment Limit	Non Research Material Shipping	Research Material Shipping	Associated Billing Reference	Collaboration created on
Details	Garrett Ames (garrett.ames@yale.edu)	Active	10	Y	Y	Procurement Department Charging Ins	2/11/2019

2. Edit your collaboration:
 - Updating the status (active or expired)
 - Increasing or decreasing the amount of shipments you would like your collaborator to be able to ship
 - Update the payment method
 - Update the allowed workflows

Note: Collaborator can only be assigned one COA Profile at a time.

Contact name: Garrett Ames
Email Address: GARRETT.AMES@YALE.EDU
Status: ▾
Shipment Limits:
Cost Object: ▾
Allowed Workflows: Rms Non-Rms

NOTE: You can terminate a collaboration by changing the status to "Expired"

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CREATING A DOMESTIC SHIPPING LABEL

Overview

- Use this chapter to easily create a shipping label for a domestic package.
- Certain shipments may require training and/or may be routed for approvals. The system will notify you if your shipment requires you to take additional training, or if it needs to be approved.
- If you are trying to create a shipping label for an international package, please refer to the [Creating an International Shipping Label](#) chapter.
- If you are shipping research materials, see the chapters on [Creating a Domestic Shipping Label for Research Materials](#) and [Creating an International Shipping Label for a Research Shipment](#).
- For additional information and FAQs for eShipGlobal, go to the [eShipGlobal information on "It's Your Yale"](#).

Key Points

- eShipGlobal provides one easy-to-use interface to create shipping labels for FedEx, UPS, and USPS (flat rate shipping). This third-party service allows you to review shipping costs at Yale contracted rates and choose the most cost-effective shipping solution.
- Using the eShipGlobal application ensures the proper purchasing protocol is followed by using online validation of the Yale Charging Instructions (COA values) and Requester on every transaction. Each transaction is tied back to Yale Financial Statements through the tracking number, charging instructions, and Requester.
- After 30 minutes of inactivity, you will automatically be logged out of the eShipGlobal system.

Shipping Carriers

Contracted domestic rates are available with FedEx, UPS, and USPS.

- Yale now has contracted rates for USPS Priority Mail Flat Rate Shipping in medium-sized boxes (11" x 8-1/2" x 5-1/2" or 13 5/8 x 11 7/8 x 3 3/8) and carrier envelopes (12-1/2" x 9-1/2").
- Federal Express and UPS will commonly appear within your shipping carrier option list while USPS will only appear when Carrier Letter or Carrier Box is selected from the packaging Type selection in the Package Information section.

Packaging

When selecting Custom Packaging as the packaging Type, provide approximate weights and container sizes.

- All packages are weighed and measured by the shipping vendor selected; prices will be adjusted according by the carrier if necessary.

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Special Arrangements and Services

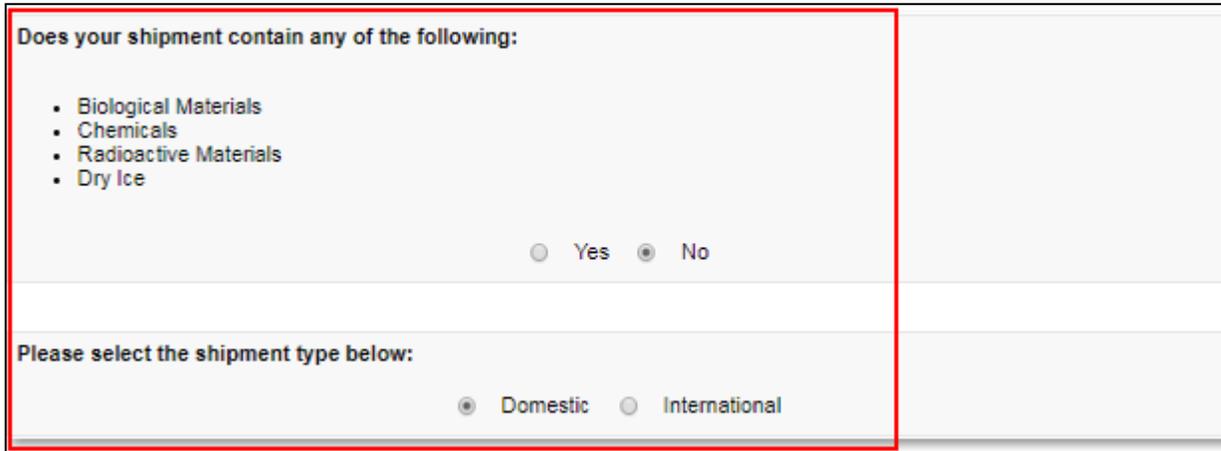
- Please note that with some shipping Carriers, additional charges may be incurred if you make special arrangements to have packages picked up.
- Adding Special Services, like Saturday delivery, Residential Delivery, Signature Required, etc. may result in additional charges with the shipping Carrier you select.
- Special Services and may not be available from all Carriers.

Create a Domestic Shipping Label

1. Click **Ship To** located in the navigation menu at the top of your eShipGlobal window.



2. Indicate if you are shipping materials classified as biological, chemical, or radioactive. If no research materials are included, choose **No**, then choose **Domestic**.

A screenshot of the shipping form. The form has a red border. The first section is titled 'Does your shipment contain any of the following:' and lists four items: Biological Materials, Chemicals, Radioactive Materials, and Dry Ice. Below the list are two radio buttons: 'Yes' and 'No'. The 'No' radio button is selected. The second section is titled 'Please select the shipment type below:' and has two radio buttons: 'Domestic' and 'International'. The 'Domestic' radio button is selected.

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3. Click on the drop-down arrow in the **Ship From** field to select a Sender from your profile.

NOTE: If you are the only Shipper in your profile, the Ship From field will automatically default to your name and physical location. However, if you are creating a shipping label for someone other than yourself, identify the Sender.

Sender Information
(Select shipper dropdown list)

Yale, John Smith ▼ Edit Add Sender Shipping Date: 02/13/2019 (MM/DD/YYYY)

Yale, John Smith
Gregory J. Watkins-Colwell, Yale Peabody Museum of Natural Hist
John Smith, Yale University

(Please enter recipient information or choose from saved recipient addresses by clicking on the 'Load from Address Book' button)

NOTE: To Edit information for one of the Senders or recipients associated with your shipping profile, refer to [Manage Address Book Entries](#).

4. Accept today's date (by default) or enter a future date in the **Shipping Date** field.
- To change the Shipping Date, click in the **Shipping Date** box and enter a new Shipping Date.
 - You can also click on the calendar icon located on the right-hand side of the **Shipping Date** field to select the date from the calendar.
 - Labels can be printed in advance.
 - The shipping date selected cannot exceed 9 days from today's date.

Sender Information
(Select shipper from the dropdown list)

Yale, John Smith ▼ Edit Add Sender Shipping Date: 02/13/2019 (MM/DD/YYYY)

5. Click on **Load from Address Book** to select a Recipient from the saved Address Book
- To enter a new Recipient, [go to step 9](#) .

Recipient Information
(Please enter recipient information or choose from saved recipient addresses by clicking on the 'Load from Address Book' button)

Load from Address Book

Add to Address Book

*Company/Contact Name:
Alternate Contact Name:
*Address 1:
Address 2:
*State: Select State ▼ *City:
Country: United States ▼ *Zip:
*Phone:
Email:

If you would like to validate the address you entered, click here

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6. Type Search criteria in the field provided. Then click **Find**.

Search for: Location: From To

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

NOTE: Address book entries will appear alphabetically by Company Name. Residential addresses will have Home listed as the Company Name. You can navigate the Address Book using the letters listed at the top of the window or using the Search feature. Please refer to [Manage Address Book Entries](#).

7. Click to select the address that you would like to use as the Recipient.

	Company/Contact vv	Alternate Contact	Address	City/State	Zip	Country
<input checked="" type="checkbox"/>	Yale University		150 Munson Street	New Haven CT	06520	United States

8. Click **Ship To** and [go to step 11](#).

- Recipient information will automatically be entered in the appropriate fields.

	Company/Contact vv	Alternate Contact	Address	City/State	Zip	Country
<input checked="" type="checkbox"/>	Yale University		150 Munson Street	New Haven CT	06520	United States

9. Complete the online form by entering the *Recipient information* for the delivery in the Ship To fields provided.

- If there is a Company Name, enter it in the **Company/Contact Name** box and then address the package to an individual by entering the Recipient contact name in the **Alternate Contact Name** box.
- If the package is intended for residential delivery, enter the Recipient contact name in the **Company/Contact Name** box.
- To add the address being entered to the saved Address Book, check the box next to Add to Address Book. Leave blank if the address will not be needed for future deliveries.

Recipient Information

(Please enter recipient information or choose from saved recipient addresses by clicking on the 'Load from Address Book' button)

Add to Address Book

*Company/Contact Name:

Alternate Contact Name:

*Address 1:

Address 2:

*State:

*City:

Country:

*Zip:

*Phone:

Email:

If you would like to validate the address you entered, click here

Fields marked with asterisks (*) are required.

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10. Click **Validate Address** to confirm the validity of the entry. After confirming the address, click **Close**.

- This is available for domestic/US addresses only.
- If address verification fails, you can still attempt to ship to this address.

Recipient Information
(Please enter recipient information or choose from saved recipient addresses by clicking on the 'Load from Address Book' button)

Add to Address Book

*Company/Contact Name:

Alternate Contact Name:

*Address 1:

Address 2:

*State:

*City:

Country:

*Zip:

*Phone:

Email:

If you would like to validate the address you entered, click here

11. Enter the number of packages for the intended Recipient. If only one package is being prepared for the Recipient, [go to step 15](#) .

- Package Types
 - Carrier Letter: Envelope provided by the shipping carrier that appears with the carriers logo printed on it. This is not a prepaid envelope.
 - Carrier PAK: Large plastic or Tyvek envelope provided by the shipping carrier that appears with the carrier's logo printed on it.
 - Carrier Box: Small boxes provided by the shipping carrier that appears with the carrier logo printed on it. There is usually a delineated area reserved for affixing the printed label or air bill.
 - Carrier Tube: Sturdy cardboard tube provided by the shipping carrier that appears with the carrier's logo printed on it. There is usually a delineated area reserved for affixing the printed label or air bill.
 - Customer Packaging: Packaging not provided by the shipping carrier.

Package Information
(Select Package type and Service from the dropdown list)

No. of pkgs. for each address above:

Identical Non-Identical

Type:

Service:

*Weight: (lbs)

Dimensions: x x (inches)

Shipment Reference:

[Help](#)

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12. Indicate whether the packages are **Identical** or **Non-Identical**.

- For Non- Identical packages, go to next step.
- For Identical packages [go to step 15](#).

NOTE: You can use a single request to ship multiple Identicle Packages to different recipients OR you can ship multiple Non-Identicle packages to a single recipients. You cannot ship multiple not-identicle packages to multiple reciepients with a single request.

NOTE: Every package will be assigned a unique tracking number and you have the opportunity to specify a different shipping Service for each Package.

Package Information
(Select Package type and Service from the dropdown list)

No. of pkgs. for each address above:

Type:

*Weight: (lbs)

Shipment Reference:

Service:

Dimensions: x x (inches)

Identical Non-Identical

[Help](#)

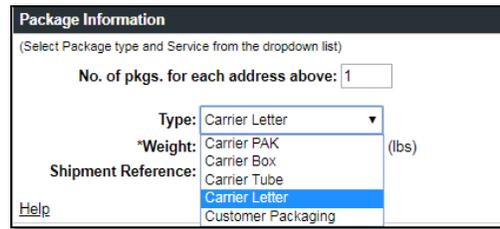
13. From the dropdown list of options provided, specify the Type of packaging, Weight / Dimensions if applicable, shipping Service, and Declared Value if applicable for each Package.

14. Click **OK**.

<input checked="" type="checkbox"/>	Yale University New Haven, CT 06511	Pkg 1	Type: <input type="text" value="Carrier Letter"/>	Service: <input type="text" value="Select a service"/>
			Weight: <input type="text" value="Letter"/> (lbs)	Dimension: <input type="text" value="Letter"/> x <input type="text" value="Letter"/> x <input type="text" value="Letter"/> (ltxwxh)
			Declared Value \$: <input type="text" value="0"/>	
<input checked="" type="checkbox"/>	Yale University New Haven, CT 06511	Pkg 2	Type: <input type="text" value="Carrier Letter"/>	Service: <input type="text" value="Select a service"/>
			Weight: <input type="text" value="Letter"/> (lbs)	Dimension: <input type="text" value="Letter"/> x <input type="text" value="Letter"/> x <input type="text" value="Letter"/> (ltxwxh)
			Declared Value \$: <input type="text" value="0"/>	

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15. Select the type of package from the Type drop down-list. Then provide the Shipment Reference and Content Description if applicable.



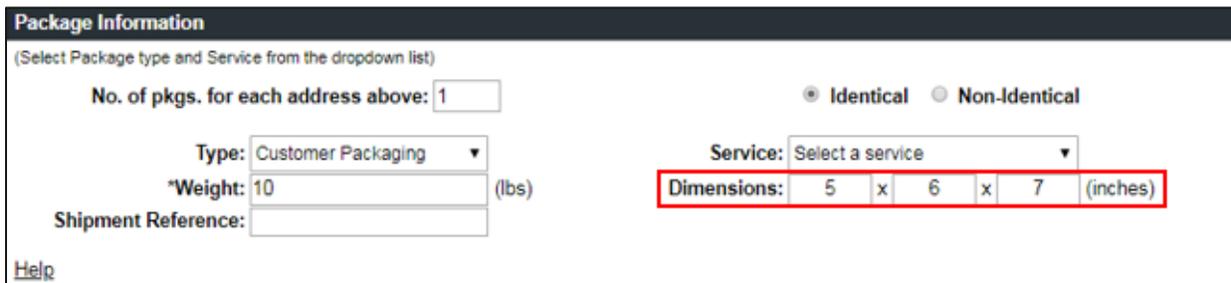
The screenshot shows the 'Package Information' form with the 'Type' dropdown menu open. The dropdown list includes: Carrier Letter, Carrier PAK, Carrier Box, Carrier Tube, Carrier Letter (highlighted), and Customer Packaging. The 'No. of pkgs. for each address above:' is set to 1. The 'Shipment Reference:' field is empty. A 'Help' link is visible at the bottom left.

16. Enter the approximate weight of the package.



The screenshot shows the 'Package Information' form with the 'Weight' field highlighted in red. The 'Type' is set to 'Customer Packaging'. The 'Service' dropdown is set to 'Select a service'. The 'Dimensions' are 5 x 6 x 7 inches. The 'No. of pkgs. for each address above:' is 1. The 'Shipment Reference:' field is empty. A 'Help' link is visible at the bottom left.

17. Enter the approximate Dimensions of the package.



The screenshot shows the 'Package Information' form with the 'Dimensions' field highlighted in red. The 'Type' is set to 'Customer Packaging'. The 'Service' dropdown is set to 'Select a service'. The 'Weight' is 10 lbs. The 'Dimensions' are 5 x 6 x 7 inches. The 'No. of pkgs. for each address above:' is 1. The 'Shipment Reference:' field is empty. A 'Help' link is visible at the bottom left.

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18. Enter or select the COA charging instructions for this shipment.

NOTE: You can elect to have a third party, or the Recipient of the package pay for delivery. Choose Third Party or Recipient from the Bill To drop-down list and enter the Account Number and Zip Code associated with the Recipient / Third Party Account Number in the boxes provided. COA Charging Instructions are required as back-up.

Cost Allocation

Select a Charging Instructions:

Save Profile Charging Instructions Profile Name:

- All transactions must specify a Grant or Gift or Yale Designated.
- Company, Cost Center, Program, Project, and Requester are required on all transactions.
- Assignee is optional.
- You may either enter the charging segment code (e.g., CC0501 for Cost Center) or search for it by name (e.g., "Physics" will present a list of all cost centers that include "Physics" in the name).
- If you are preparing the transaction on behalf of someone else, specify that person by last name as the Requester. Otherwise, specify yourself as the Requester.

*Company:	<input type="text" value="CO01"/>	<input type="text" value="Yale University"/>
Grant:	<input type="text"/>	<input type="text"/>
Gift:	<input type="text"/>	<input type="text"/>
Yale Designated:	<input type="text" value="YD000002"/>	<input type="text" value="General Appropriations - Central Program Support"/>
*Cost Center:	<input type="text" value="CC0075"/>	<input type="text" value="FBOPRO Procurement"/>
*Program:	<input type="text" value="PG00363"/>	<input type="text" value="General University Administration (51)"/>
*Project:	<input type="text" value="PJ000001"/>	<input type="text" value="General Project"/>
Assignee:	<input type="text"/>	<input type="text"/>
Spend Category:	<input type="text" value="SC204"/>	<input type="text" value="Freight Shipping and Delivery"/>
*Requester:	<input type="text"/>	<input type="text"/>

19. Type in the first name, last name, cost center name, or cost center number of the **Requester** to search. Then select the appropriate person from the list of options provided.

NOTE: The Requester is the individual who requested that the package be shipped. This information is captured to facilitate reporting data and improve the ability to provide financial reviewers with complete "initiator/Preparer" information on all University transactions.

Cost Allocation

Select a Charging Instructions:

Save Profile Charging Instructions Profile Name:

- All transactions must specify a Grant or Gift or Yale Designated.
- Company, Cost Center, Program, Project, and Requester are required on all transactions.
- Assignee is optional.
- You may either enter the charging segment code (e.g., CC0501 for Cost Center) or search for it by name (e.g., "Physics" will present a list of all cost centers that include "Physics" in the name).
- If you are preparing the transaction on behalf of someone else, specify that person by last name as the Requester. Otherwise, specify yourself as the Requester.

*Company:	<input type="text" value="CO01"/>	<input type="text" value="Yale University"/>
Grant:	<input type="text"/>	<input type="text"/>
Gift:	<input type="text"/>	<input type="text"/>
Yale Designated:	<input type="text" value="YD000002"/>	<input type="text" value="General Appropriations - Central Program Support"/>
*Cost Center:	<input type="text" value="CC0075"/>	<input type="text" value="FBOPRO Procurement"/>
*Program:	<input type="text" value="PG00363"/>	<input type="text" value="General University Administration (51)"/>
*Project:	<input type="text" value="PJ000001"/>	<input type="text" value="General Project"/>
Assignee:	<input type="text"/>	<input type="text"/>
Spend Category:	<input type="text" value="SC204"/>	<input type="text" value="Freight Shipping and Delivery"/>
*Requester:	<input type="text" value="13701189"/>	<input type="text" value="Minor, Przemyslaw Thomas -- CC0047 FBOFIN Business"/>

NOTE: The Screen shots in this guide provide COA charging instructions / cost allocations. They are solely intended for instructional purposes and should not be used in your shipments. For questions related to what COA you should use, please contact your supervisor or your business office.

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20. Select the *Special Instructions* or enter the **Declared Value** (for insurance purposes,if applicable) required for this package.

Special Instructions
(Additional charges may apply for some special services)

Material Transfer Agreement (MTA) **MTA Number :**

Return Shipment (FedEx, UPS only) **Hold at Station** (FedEx, UPS only)

Saturday Delivery (FedEx, UPS only) **Residential Delivery** (FedEx, UPS only)

Signature Required **Signature Release** (FedEx, UPS, LSO only)

Declared Value: (USD)

[Help](#)

NOTE: Additional charges may apply for some special services and are not available from all shipping carriers.

21. Select the *Email Notifications* requested.

- You may be prompted to enter email addresses for recipient.

Email Notifications
(Email notifications will be sent free of charge)

Notify Shipper on Order **Notify Recipient on Order** **Notify Shipper on Delivery** **Notify Others on Delivery**

Notify Shipper on Exceptions

[Help](#)

22. Click **Show Quote**.

Email Notifications
(Email notifications will be sent free of charge)

Notify Shipper on Order **Notify Recipient on Order** **Notify Shipper on Delivery** **Notify Others on Delivery**

Notify Shipper on Exceptions

[Help](#)

23. Select a shipping Carrier, Service, and Rate from the list of options provided.

- Shipping Carrier options will be displayed from the least expensive to the most expensive option.

NOTE: There may be a substantial increase or difference in price for an 8:00 AM delivery as opposed to a 10:30 AM delivery from the same carrier. A breakdown of estimated charges will be displayed on the right side of the window or when you hover the Contracted Rate. The Transaction Charge will not be billed to the charging provided.

24. Click **Ship**.

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Print Label

1. Click **Print Airwaybill**.

Order #: 101088880

Tracking #: 785526307510

Shipment Information

Origin	Destination	Package Information	Workday Information	Scan Activity	Return Shipment	Amount
Yale John Smith 25 Science Park 5th Floor New Haven CT 06511-1968 United States	Yale University 150 Munson Street New Haven CT 06520 United States	FedEx FedEx Express Saver CUSTOM 10 lbs DO Email - S	Company: CO01 Yale Designated: YD000002 Cost Center: CC0075 Program: PG00400 Project: PJ000001 Spend Category: SC204 Requester ID: 11784524	No information at this time.	Return Date 2/22/2019 <input type="button" value="Create Return Shipment"/>	\$7.46

Total for this shipment \$7.46

2. Click **Print Airwaybill**.

- Paper labels will print on locally installed printers, network printers, or multi-function devices.

Print Airwaybill
Email
Airwaybill

ORIGIN: 06FB
JOHN SMITH
YALE
25 SCIENCE PARK
5TH FLOOR
NEW HAVEN, CT 06511
UNITED STATES US

SHIP DATE: 19FEB19
ACTWGT: 10.00 LB
CAG: 10272453MS/02500
DMS: 5d47 IN
BILL SENDER

TO
YALE UNIVERSITY
150 MUNSON STREET
NEW HAVEN CT 06520
FEF:
(203) 430-9492

565L200E3D03AD

TRK#
7855 2630 7510

WED - 20 FEB 4:30P
EXPRESS SAVER

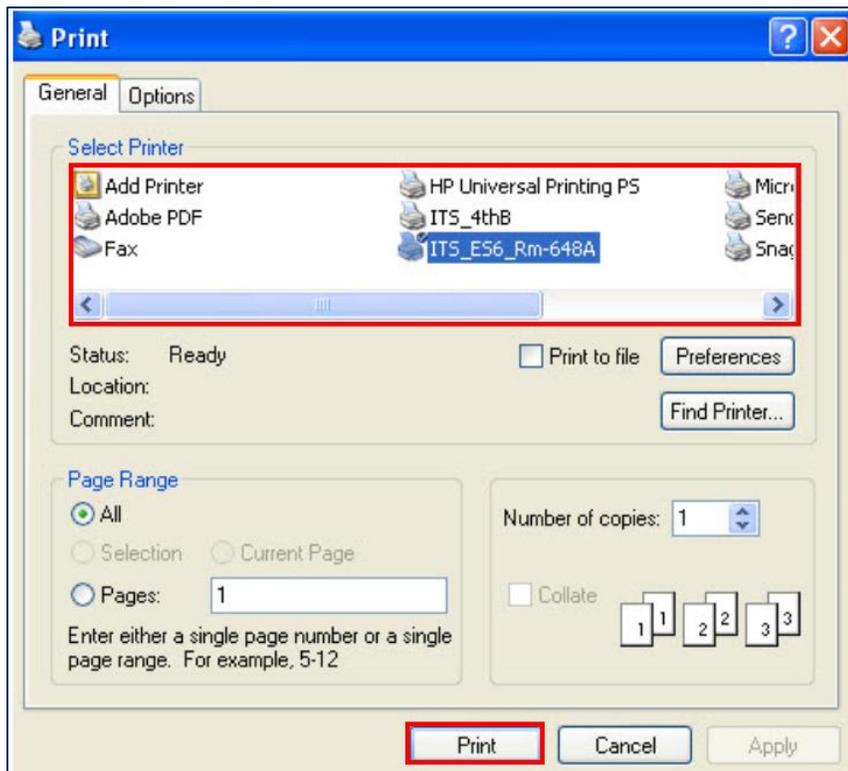
00 EFBA
CT-US
06520
BDL

FedEx
E

NOTE: When the Shipping Label is printed, fold the paper in half and insert it into the plastic sleeve of your envelope. The Airway bill information should be facing through the window so that it can be easily scanned by the Carrier.

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3. Select the Printer where you would like to print the shipping label. Then click **Print**.



4. Close out the Print Label Screen to return to the My Shipments window.

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Email Label

1. Click **Email Label** to send the shipping label electronically to another individual.

Sender Name:	John Smith
Sender Email:	jsmith@eshipglobal.com
Receiver Name:	
Receiver Email:	
Subject:	URL to print label
Message:	Please click on the link provided below to print the airwaybill for the package.
<input type="button" value="Preview Email"/> <input type="button" value="Send Email"/>	

2. Enter the **Receiver Name** and **Receiver Email** in the boxes provided.
 - Customize the **Subject** and **Message** content if you choose.

Sender Name:	John Smith
Sender Email:	jsmith@eshipglobal.com
Receiver Name:	Tom Jones
Receiver Email:	tjones@yale.edu
Subject:	URL to print label
Message:	Hi Tom, please find the label for you to print and send.
<input type="button" value="Preview Email"/> <input type="button" value="Send Email"/>	

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3. Click **Preview Email**.

Sender Name:	John Smith
Sender Email:	jsmith@eshipglobal.com
Receiver Name:	Tom Jones
Receiver Email:	tjones@yale.edu
Subject:	URL to print label
Message:	Hi Tom, please find the label for you to print and send.

Dear Tom Jones,
Hi Tom, please find the label for you to print and send.

<http://basetst.eshipglobal.com/print/printlabel.asp?auth=RbGAuO58gJh8I4KNN3IEw1DprTIOsnoP0IVx9UOintmI31nVRYU5FRNS2fQ3NCkSXErKjXqswo&inInd=>
Regards,
John Smith

4. Review the message and click **Send Email**.

- To edit the message before sending, [return to step 2](#).
- After the Email is sent to the Receiver Email specified, an Email sent successfully message will appear.

5. Click the **Back to Summary** button, located in the upper-right corner of the screen, to return to the My Shipments window.

[Return to Table of Contents](#)

Express Shipping powered by eShipGlobal

CREATE AND MAINTAIN QUICKSHIP PROFILES FOR DOMESTIC SHIPPING

Overview

- Use this chapter to easily create a QuickShip profile for recurring domestic shipments. This feature is most helpful when you ship the same package repeatedly to the same Recipient.
- The Recipient address information and all of the shipping selections entered can be saved to the QuickShip profile.
- QuickShip functionality is restricted to Domestic shipments that do not involve research materials.
- For additional information and FAQs for eShipGlobal, go to the [eShipGlobal information on “It’s Your Yale”](#).

NOTE: Quickship does not allow shipments to multiple recipients within one transaction.

NOTE: The Screen shots in this guide provide COA charging instructions / cost allocations. They are solely intended for instructional purposes and should not be used in your shipments. For questions related to what COA you should use, please contact your supervisor or your business office.

Key Points

- This chapter assumes that you have successfully logged into eShipGlobal and have experience creating, printing, and emailing domestic shipping labels in the eShipGlobal system.
- Please refer to the [Create a Domestic Shipping Label](#) chapter for more detailed information about the sections and information necessary to complete a domestic shipping label.
- The number of packages, package type, service, charging instructions, special instructions, and email notifications can be modified after creating a QuickShip profile.
- Edit a Saved QuickShip profile when you are ready to ship a new package to the addresses associated with the profile.
- After 30 minutes of inactivity, you will automatically be logged out of the eShipGlobal system.

Example:

- In this example, we are sending a single Carrier Letter to a new Recipient using FedEx Express Saver service and will print the shipping label for the package.

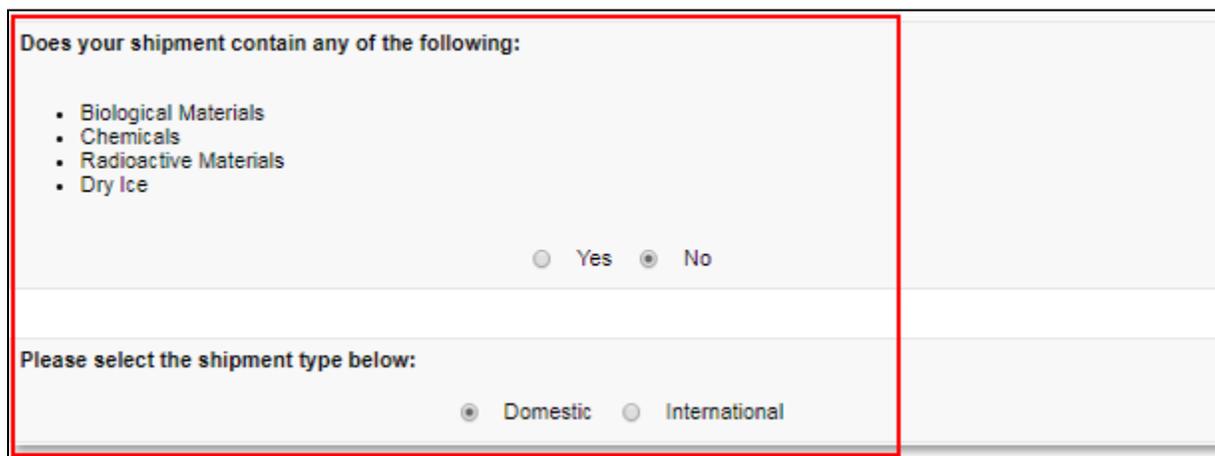
Express Shipping powered by eShipGlobal

Create a QuickShip Profile

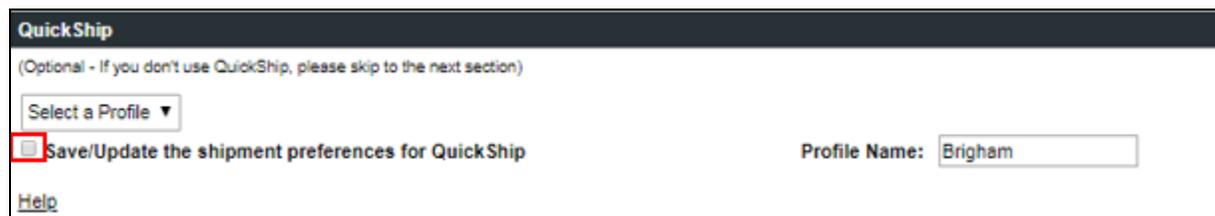
1. Click Ship To located in the navigation menu at the top of your eShipGlobal window.



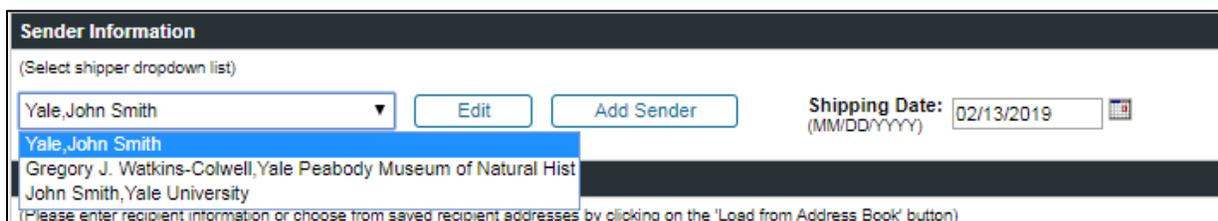
2. QuickShip functionality is restricted to Domestic shipments that do not involve research materials.
 - Click **No** for first prompt
 - Click **Domestic** for second prompt.



3. At the top of the domestic shipping form, click **Save /Update the shipment preferences for QuickShip** and enter a name for the profile you would like to create.



4. Select the Sender.



5. Complete the online form by entering the Recipient delivery information in the Ship To fields provided.
 - If there is a Company Name, enter it in the **Company / Contact Name** box and then address the package to an individual by entering the Recipient contact name in the **Alternate Contact Name** box.
 - If the package is intended for residential delivery, enter the Recipient contact name in the **Company / Contact Name** box.

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NOTE: Required Fields are marked with an asterisks (*)

Recipient Information
(Please enter recipient information or choose from saved recipient addresses by clicking on the 'Load from Address Book' button)

Add to Address Book

*Company/Contact Name:

Alternate Contact Name:

*Address 1:

Address 2:

*City:

*State:

*Zip:

Country:

*Phone:

Email:

If you would like to validate the address you entered, click here

6. Click **Validate Address**.
 - This is available for domestic/US addresses only.
 - If address verification fails, you can still attempt to ship to this address.
7. Select the Type of package from the **Type** drop down-list. Then provide the **Shipment Reference** and **Content Description** if applicable.

NOTE: System defaults to "Carrier Letter"

Package Information
(Select Package type and Service from the dropdown list)

No. of pkgs. for each address above:

Identical Non-Identical

Type:

*Weight: (lbs)

Shipment Reference:

Service:

Dimensions: x x (inches)

[Help](#)

8. Choose a **Service** from the drop-down list of options provided.

Package Information
(Select Package type and Service from the dropdown list)

No. of pkgs. for each address above:

Identical Non-Identical

Type:

*Weight: (lbs)

Shipment Reference:

Service:

Dimensions: (inches)

[Help](#)

Express Shipping powered by eShipGlobal

9. Enter or select the COA charging instructions that indicate to where the shipping costs should be charged.

Cost Allocation

Select a Charging Instructions:

Save Profile Charging Instructions Profile Name:

- All transactions must specify a Grant or Gift or Yale Designated.
- Company, Cost Center, Program, Project, and Requester are required on all transactions.
- Assignee is optional.
- You may either enter the charging segment code (e.g., CC0501 for Cost Center) or search for it by name (e.g., "Physics" will present a list of all cost centers that include "Physics" in the name).
- If you are preparing the transaction on behalf of someone else, specify that person by last name as the Requester. Otherwise, specify yourself as the Requester.

*Company:	CO01	Yale University
Grant:		
Gift:		
Yale Designated:		
*Cost Center:		
*Program:		
*Project:		
Assignee:		
Spend Category:	SC204	Freight Shipping and Delivery
*Requester:		

NOTE: Cost Allocation info / COA Charging Instructions are not saved as part of the QuickShip profiles.

10. Type in the first name, last name, cost center name, or cost center number of the Requester to search. Then select the appropriate person from the list of options provided.

Cost Allocation

Select a Charging Instructions:

Save Profile Charging Instructions Profile Name:

- All transactions must specify a Grant or Gift or Yale Designated.
- Company, Cost Center, Program, Project, and Requester are required on all transactions.
- Assignee is optional.
- You may either enter the charging segment code (e.g., CC0501 for Cost Center) or search for it by name (e.g., "Physics" will present a list of all cost centers that include "Physics" in the name).
- If you are preparing the transaction on behalf of someone else, specify that person by last name as the Requester. Otherwise, specify yourself as the Requester.

*Company:	CO01	Yale University
Grant:		
Gift:		
Yale Designated:	YD000002	General Appropriations - Central Program Support
*Cost Center:	CC0075	FBOPRO Procurement
*Program:	PG00363	General University Administration (51)
*Project:	PJ000001	General Project
Assignee:		
Spend Category:	SC204	Freight Shipping and Delivery
*Requester:	13701189	Minior, Przemyslaw Thomas -- CC0047.FBOFIN Business

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11. Select the *Special Instructions* or **Declared Value** required for this package.

Special Instructions
(Additional charges may apply for some special services)

Material Transfer Agreement (MTA) MTA Number :

Return Shipment (FedEx, UPS only) Hold at Station (FedEx, UPS only)

Saturday Delivery (FedEx, UPS only) Residential Delivery (FedEx, UPS only)

Signature Required Signature Release (FedEx, UPS, LSO only)

Declared Value: (USD)

[Help](#)

12. Select the *Email Notifications* requested.

Email Notifications
(Email notifications will be sent free of charge)

Notify Shipper on Order Notify Recipient on Order Notify Shipper on Delivery Notify Others on Delivery

Notify Shipper on Exceptions

[Help](#)

13. Click **Ship Now**.

Email Notifications
(Email notifications will be sent free of charge)

Notify Shipper on Order Notify Recipient on Order Notify Shipper on Delivery Notify Others on Delivery

Notify Shipper on Exceptions

[Help](#)

14. Click **Print Airwaybill** or **Email Label**.

Order #: 101088880

Tracking #: 785526307510

Shipment Information

Origin	Destination	Package Information	Workday Information	Scan Activity	Return Shipment	Amount
Yale John Smith 25 Science Park 5th Floor New Haven CT 06511-1968 United States	Yale University 150 Munson Street New Haven CT 06520 United States	FedEx FedEx Express Saver CUSTOM 10 lbs DO Email - S	Company: CO01 Yale Designated: YD000002 Cost Center: CC0075 Program: PG00400 Project: PJ000001 Spend Category: SC204 Requester ID: 11784524	No information at this time.	Return Date 2/22/2019 <input type="button" value="Create Return Shipment"/>	\$7.46

Total for this shipment: \$7.46

15. Use instructions provided in the [Create a Domestic Shipping Label](#) chapter for more information about printing or emailing labels.

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Edit a QuickShip Profile

NOTE: Edit a Saved QuickShip profile when you are ready to ship a new package to the addresses associated with the profile.

1. To use the saved QuickShip profile to prepare a new shipment, click QuickShip located in the navigation menu at the top of your eShipGlobal window.



Yale

Welcome, John Smith

2. Click on the profile name link (the profile will load).

Profile Name	Created Date
<input type="checkbox"/> Yale University	12/3/2018 2:47:29 PM

3. If your changes require an update to the saved Recipient address associated with the QuickShip profile, click on the Company/Contact Name link within the Ship To section.

Recipient Information				
(Please enter recipient information or choose from saved recipient addresses by clicking on the 'Load from Address Book' button)				
<input type="button" value="Load from Address Book"/>				
Company/Contact Yale University	Alternate Contact	Address 18111 Preston Road	City/State Dallas TX	Zip/Postal Code 75252

4. Update the Recipient Address as necessary, then click Save Changes.

*Company/Contact Name:	<input type="text" value="Yale University"/>
Alternate Contact Name:	<input type="text"/>
*Address 1:	<input type="text" value="18111 Preston Road"/>
Address 2:	<input type="text"/>
*State:	<input type="text" value="Texas"/>
*City:	<input type="text" value="Dallas"/>
Country:	<input type="text" value="United States"/>
*Zip:	<input type="text" value="75252"/>
*Phone:	<input type="text" value="9725181775"/>
Email:	<input type="text"/>
<input type="button" value="Cancel/Go Back"/> <input type="button" value="Save Changes"/>	

5. Continue with the label creation then print or email your label
6. Your changes will automatically be saved to the selected QuickShip profile after you create the shipping label.

Delete a QuickShip Profile

1. Click QuickShip located in the navigation menu at the top of your eShipGlobal window.
2. Click to select the Profile that you would like to Delete.

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	Profile Name	Created Date
<input checked="" type="checkbox"/>	Yale Unviersity	12/3/2018 2:47:29 PM

[Delete](#)

3. Click **Delete**.
4. Click **OK** to confirm profile deletion.

Do you want to delete profile? Click OK to continue.

SHIP TRACK [OK](#) [Cancel](#) ACCOUNT MANAGER

Quick Ship

1.To load a saved Quick Ship Profile, click on the Profile Name link. Once the Profile is loaded, you can Edit the Profile as necessary and Ship it.
2.To Delete a Profile, simply check the box and click on the Delete button.

	Profile Name	Created Date
<input checked="" type="checkbox"/>	Yale University	12/3/2018 2:47:29 PM

[Delete](#)

Shipping From a QuickShip Profile

1. Select a saved profile
2. After clicking **Ship** from the navigation menu and making the appropriate selections regarding Research Materials and Domestic or International shipping, select a saved QuickShip profile from the list of options provided in the dropdown list.

QuickShip
(Optional - If you don't use QuickShip, please skip to the next section)

Yale University ▾

Save/Update the shipment preferences for QuickShip Profile Name:

[Help](#)

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3. Click **Ship Now**.

Email Notifications

(Email notifications will be sent free of charge)

Notify Shipper on Order Notify Recipient on Order Notify Shipper on Delivery Notify Others on Delivery

Notify Shipper on Exceptions

[Help](#)

[Start Over](#) [Ship Now](#) [Show Quote](#)

4. Click **Print Airwaybill** or **Email Label**.

Order #: 101088880

Tracking #: [785526307510](#)

Shipment Information

Origin	Destination	Package Information	Workday Information	Scan Activity	Return Shipment	Amount
Yale John Smith 25 Science Park 5th Floor New Haven CT 06511-1968 United States	Yale University 150 Munson Street New Haven CT 06520 United States	FedEx 2/15/2019 FedEx Express Saver CUSTOM 10 lbs DO Email - S	Company: CO01 Yale Designated: YD000002 Cost Center: CC0075 Program: PG00400 Project: PJ000001 Spend Category: SC204 Requester ID: 11784524	No information at this time.	Return Date 2/22/2019 Create Return Shipment	\$7.46
Total for this shipment						\$7.46

[Cancel Shipment](#) [Print Airwaybill](#) [Schedule Pickup](#) [Create Return Order](#) [Supporting Documents](#) [Shipment History](#)

5. Use instructions provided in the [Create a Domestic Shipping Label](#) chapter for more information about printing or emailing labels.

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Express Shipping powered by eShipGlobal

CREATING AN INTERNATIONAL SHIPPING LABEL

Overview

- Use this chapter to easily create a shipping label for an international package.
- Certain shipments may require training and/or may be routed for approvals. The system will notify you if your shipment requires you to take additional training, or if it needs to be approved.
- If you are trying to create a shipping label for a domestic package, please refer to the [Creating a Domestic Shipping Label](#) chapter.
- If you are shipping research materials, see the chapters on [Creating a Domestic Shipping Label for Research Materials](#) and [Creating an International Shipping Label for a Research Shipment](#).
- For additional information and FAQs for eShipGlobal, go to the [eShipGlobal information on "It's Your Yale"](#).

Key Points

- eShipGlobal provides one easy-to-use interface to create shipping labels for FedEx, UPS, DHL, and USPS (flat rate shipping). This third-party service allows you to review shipping costs at Yale contracted rates and choose the most cost-effective shipping solution.
- Using the eShipGlobal application ensures the proper purchasing protocol is followed by using online validation of the Yale charging and Requester on every transaction. Each transaction is tied back to Yale Financial Statements through the tracking number and charging and Requester.
- After 30 minutes of inactivity, you will automatically be logged out of the eShipGlobal system.

Shipping Carriers

- Contracted domestic rates are available with FedEx, UPS, DHL, and USPS.
 - Yale now has contracted rates for USPS Priority Mail Flat Rate Shipping in medium sized boxes (11" x 8-1/2" x 5-1/2" or 13 5/8 x 11 7/8 x 3 3/8) and carrier envelopes (12-1/2" x 9-1/2"). Right now, only non-dutiable shipments are supported for USPS.
 - Federal Express, UPS, and DHL will commonly appear within your shipping carrier option list while USPS will only appear when Carrier Letter or Carrier Box is selected from the packaging Type selection in the Package Information section.

Packaging

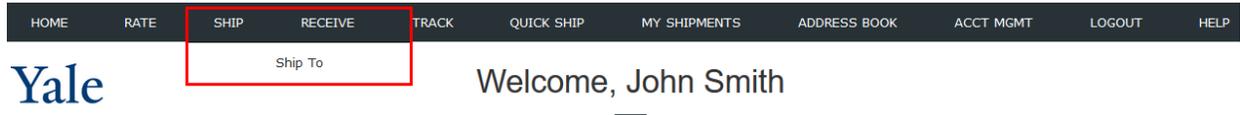
- When selecting Custom Packaging as the packaging Type, provide approximate weights and container sizes.
 - All packages are weighed and measured by the shipping vendor selected; prices will be adjusted according by the carrier if necessary.

Special Arrangements and Services

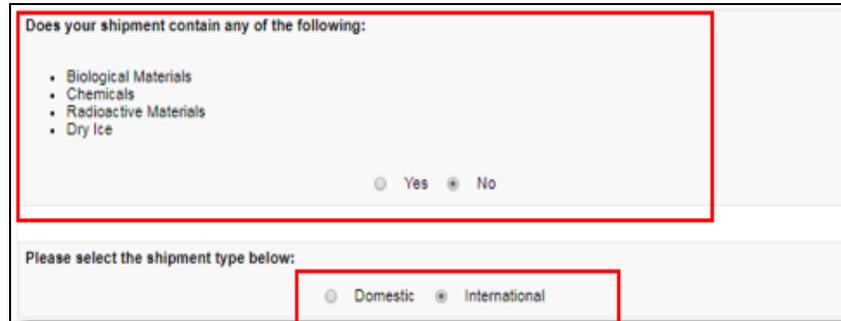
- Please note that with some shipping Carriers, additional charges may be incurred if you make special arrangements to have packages picked up.
- Adding Special Services, like Saturday delivery, Residential Delivery, Signature Required, etc. may result in additional charges with the shipping Carrier you select. Special Services may not be available from all Carriers.

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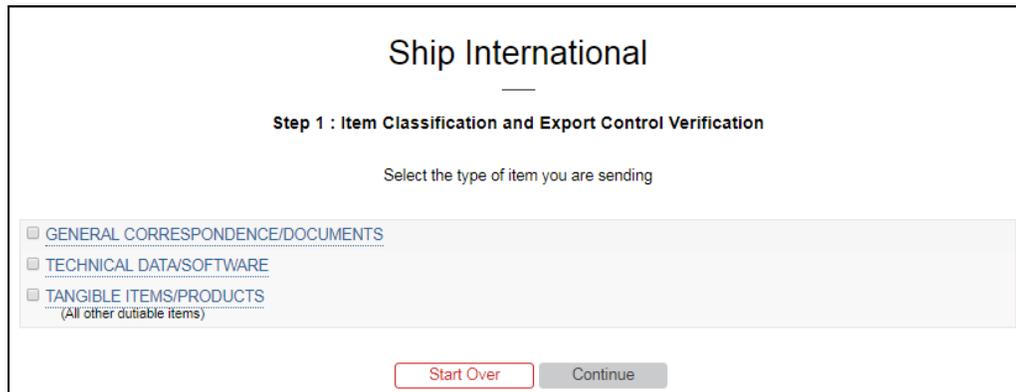
1. Click Ship located in the navigation menu at the top of your eShipGlobal window.



2. Screen shot of step Indicate if you are shipping materials classified as biological, chemical, or radioactive (research materials). If so, please see [Creating an International Shipping Label for a Research Shipment](#). Chose **No** for non-research materials, then choose **International**.

A screenshot of a web form for shipping classification. The form has a white background. At the top, it says 'Does your shipment contain any of the following:'. Below this, there is a list of items: Biological Materials, Chemicals, Radioactive Materials, and Dry Ice. At the bottom of this section, there are two radio buttons: 'Yes' and 'No'. The 'No' button is selected. Below this section, it says 'Please select the shipment type below:'. There are two radio buttons: 'Domestic' and 'International'. The 'International' button is selected. A red box highlights the 'No' and 'International' options.

3. Select the type of item you want to ship internationally and click "Continue". If you don't know which item to select, hover over the links to see descriptions. For purpose of this scenario we will select "Documents".

A screenshot of a web form titled 'Ship International'. The form has a white background. At the top, it says 'Ship International'. Below this, it says 'Step 1 : Item Classification and Export Control Verification'. Below that, it says 'Select the type of item you are sending'. There are three radio buttons with labels: 'GENERAL CORRESPONDENCE/DOCUMENTS', 'TECHNICAL DATA/SOFTWARE', and 'TANGIBLE ITEMS/PRODUCTS (All other dutiable items)'. The 'GENERAL CORRESPONDENCE/DOCUMENTS' option is selected. At the bottom of the form, there are two buttons: 'Start Over' and 'Continue'. The 'Continue' button is highlighted.

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4. Complete online form by entering the Item Name, Gross Weight, Quantity and Net Value.

Ship International

Step 1 : Item Classification and Export Control Verification

ITEM SELECTION

Identify the item that you plan to ship. Then click Continue button to proceed to Shipment details. Required fields are indicated by an asterisk.

Material Entry

Item Classification: GENERAL CORRESPONDENCE/DOCUMENTS

*Item Name:

*Gross Weight: POUNDS ▾

*Quantity: PIECES ▾

*Net Value in USD:

*Enter the total value of items shipped in each classification.

5. On the item selection form for Technical Data/Software, and Tangible Item/Products, there are two additional optional fields called "Schedule B Number" and the "ECCN#".

Material Entry

Item Classification: TANGIBLE ITEMS/PRODUCTS

*Item Name:

*Gross Weight: POUNDS ▾

*Quantity: PIECES ▾

*Net Value in USD:

Country of Origin: United States ▾

²Schedule B Number:

¹Do you have an ECCN? Yes No

NOTE: Visit <https://www.export.gov/welcome> for more information about exporting from the United States.

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- Click on the drop-down arrow in the **Ship From** field to select a **Sender** from your profile.

NOTE: If you are the only Shipper in your profile, the Ship From field will automatically default to your name and physical location. However, if you are creating a shipping label for someone other than yourself, identify the Sender.

NOTE: To Edit information for one of the Senders or recipients associated with your shipping profile, refer to [Manage Address Book Entries](#).

Sender Information
(Select shipper dropdown list)

Yale, John Smith **Shipping Date:** 02/13/2019
(MM/DD/YYYY)

Yale, John Smith
Gregory J. Watkins-Colwell, Yale Peabody Museum of Natural Hist
John Smith, Yale University

(Please enter recipient information or choose from saved recipient addresses by clicking on the 'Load from Address Book' button)

- Accept today's date (by default) or enter a new date in the Shipping Date field.
 - To change the Shipping Date, click in the **Shipping Date** box and enter a new Shipping Date.
 - You can also click on the calendar icon located on the right-hand side of the **Shipping Date** field to select the date from the calendar.
 - Labels can be printed in advance.
 - The shipping date selected cannot exceed 9 days from today's date.

Sender Information
(Select shipper from the dropdown list)

Yale, John Smith **Shipping Date:** 02/13/2019
(MM/DD/YYYY)

- Click on Load from Address Book to select a Recipient from the saved Address Book, and go to next step
 - To enter a new Recipient, [go to step 13](#).

Recipient Information
(Please enter recipient information or choose from saved recipient addresses by clicking on the 'Load from Address Book' button)

Add to Address Book

*Company/Contact Name:
Alternate Contact Name:
*Address 1:
Address 2: *City:
*State: Select State *Zip:
Country: United States
*Phone:
Email:

If you would like to validate the address you entered, click here

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9. Type Search criteria in the field provided, then click Find.



NOTE: Address book entries will appear alphabetically by Company Name. Residential addresses will have Home listed as the Company Name. You can navigate the Address Book using the letters listed at the top of the window or using the Search feature. Please refer to [Managing Your Address Book](#) for more detail.

10. Click to select the address that you would like to use as the Recipient.



11.

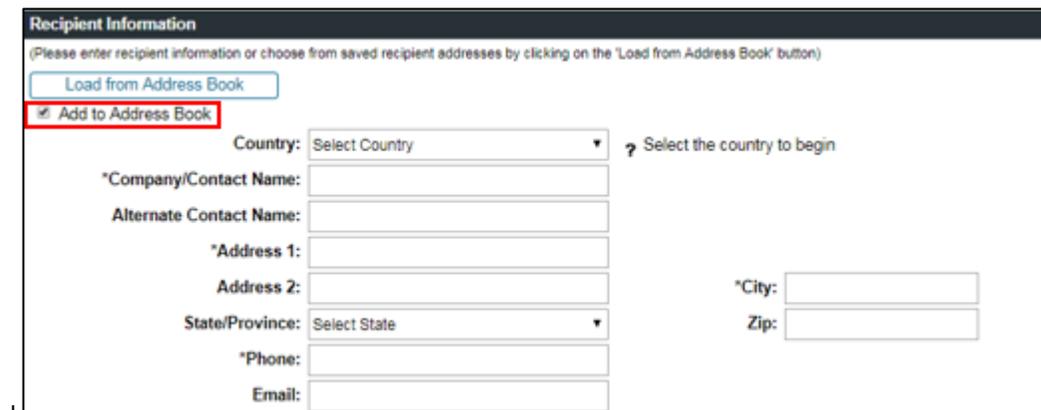
Recipient information will automatically be entered in the appropriate fields.

12. Click **Ship To** and [go to step 17](#).

13. Enter Recipient address information

- If there is a Company Name, enter it in the **Company / Contact Name** box and then address the package to an individual by entering the Recipient contact name in the **Alternate Contact Name** box.
- If the package is intended for residential delivery, enter the Recipient contact name in the **Company / Contact Name** box.

To add the address being entered to the saved Address Book, click in the box next to **Add to Address Book** or leave blank if the address will not be needed for future deliveries.



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14. Select the Recipient Country from the drop-down list of options provided.

The screenshot shows the 'Recipient Information' form. A red box highlights the 'Country' dropdown menu, which is open to show a list of countries including Bermuda, Andorra, Angola, Anguilla Islands, Antigua & Barbuda, Argentina, Armenia, Aruba, Australia, Austria, Azerbaijan, Azores(Portugal), Bahamas, Bahrain, Bangladesh, Barbados, Belarus, Belgium, Belize, Benin, and Bermuda. The 'Bermuda' option is selected and highlighted in blue. Other fields in the form include 'Add to Address Book' (checked), '*Company/Contact Name', 'Alternate Contact Name', '*Address 1', 'Address 2', 'State/Province', '*Phone', 'Email', '*City', and 'Zip'. Below the form, there is a table for 'Items' and 'Package Information'.

Item Name	Item Classification	Net Weight	Net Value(USD)	Quantity
Documents	Documents	LB	1	1 PCS

15. Complete the online form by entering the Recipient information for the delivery in the Ship To fields provided.

- Canada and Mexico require a State/Province selection.

The screenshot shows the 'Recipient Information' form with the following fields filled out: 'Country' is Bermuda; '*Company/Contact Name' is Bermuda Bio Station of Research; 'Alternate Contact Name' is Mr. John Rue; '*Address 1' is 17 Biological Station Lane; 'Address 2' is Ferry Reach; 'State/Province' is Select State; '*Phone' is 4412971880; 'Email' is jrue@biostation.com; '*City' is Saint Georges; and 'Zip' is empty. A red box highlights the form fields, and a blue box highlights the email field.

Note: Fields marked with asterisks (*) are required.

Express Shipping powered by eShipGlobal

16. Select the Type of package from the Type drop down-list. Then provide the Shipment Reference and Content Description if applicable.

The screenshot shows the 'Package Information' form. At the top, it says '(Select Package type and Service from the dropdown list)'. Below this, there is a field for 'No. of pkgs. for each address above:' with a value of '1'. To the right, there are radio buttons for 'Identical' (selected) and 'Non-Identical'. The 'Type' dropdown is set to 'Carrier Letter'. The '*Weight:' field is '0.5 (lbs)'. The 'Service:' dropdown is 'Select a service'. The 'Dimensions:' are 'L x W x H (inches)'. The 'Shipment Reference:' field is highlighted with a red box. A 'Help' link is at the bottom left.

Package Types

- Carrier Letter: Envelope provided by the shipping carrier that appears with the carrier's logo printed on it. This is not a prepaid envelope.
- Carrier PAK: Large plastic or Tyvek envelope provided by the shipping carrier that appears with the carrier's logo printed on it.
- Carrier Box: Small boxes provided by the shipping carrier that appears with the carrier logo printed on it. There is usually a delineated area reserved for affixing the printed label or airbill.
- Carrier Tube: Sturdy cardboard tube provided by the shipping carrier that appears with the carrier's logo printed on it. There is usually a delineated area reserved for affixing the printed label or airbill.
- Customer Packaging: Packaging not provided by the shipping carrier.

17. Enter the approximate Weight and Dimensions of the package.

The screenshot shows the 'Package Information' form. The 'Type' dropdown is set to 'Customer Packaging'. The '*Weight:' field is '10 (lbs)'. The 'Service:' dropdown is 'Select a service'. The 'Dimensions:' field is highlighted with a red box and contains '18 x 6 x 6 (inches)'. The 'Shipment Reference:' field is empty. A 'Help' link is at the bottom left.

18. Provide a Shipment Reference (optional).

The screenshot shows the 'Package Information' form. The 'Type' dropdown is set to 'Carrier Letter'. The '*Weight:' field is '0.5 (lbs)'. The 'Service:' dropdown is 'Select a service'. The 'Dimensions:' are 'L x W x H (inches)'. The 'Shipment Reference:' field is highlighted with a red box. A 'Help' link is at the bottom left.

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19. Enter or select the COA charging instruction for this shipment.

Cost Allocation

Select a Charging Instructions:

Save Profile Charging Instructions Profile Name:

- All transactions must specify a Grant or Gift or Yale Designated.
- Company, Cost Center, Program, Project, and Requester are required on all transactions.
- Assignee is optional.
- You may either enter the charging segment code (e.g., CC0501 for Cost Center) or search for it by name (e.g., "Physics" will present a list of all cost centers that include "Physics" in the name).
- If you are preparing the transaction on behalf of someone else, specify that person by last name as the Requester. Otherwise, specify yourself as the Requester.

*Company:	CO01	Yale University
Grant:		
Gift:		
Yale Designated:		
*Cost Center:		
*Program:		
*Project:		
Assignee:		
Spend Category:	SC204	Freight Shipping and Delivery
*Requester:		

NOTE: You can elect to have a Third Party, or the Recipient of the package pay for delivery and/or the Duties and Taxes associated with it. Choose Third Party or Recipient from the Bill To drop-down list. Enter the Recipient / Third Party Account Number, Country, and the Zip Code associated with the Recipient / Third Party Account Number in the boxes provided. Charging is required as back-up.

20. Type in the last name of the Requester who requested the package label. Then select the appropriate person from the list of options provided.

Cost Allocation

Select a Charging Instructions:

Save Profile Charging Instructions Profile Name:

- All transactions must specify a Grant or Gift or Yale Designated.
- Company, Cost Center, Program, Project, and Requester are required on all transactions.
- Assignee is optional.
- You may either enter the charging segment code (e.g., CC0501 for Cost Center) or search for it by name (e.g., "Physics" will present a list of all cost centers that include "Physics" in the name).
- If you are preparing the transaction on behalf of someone else, specify that person by last name as the Requester. Otherwise, specify yourself as the Requester.

*Company:	CO01	Yale University
Grant:		
Gift:		
Yale Designated:	YD000002	General Appropriations - Central Program Support
*Cost Center:	CC0075	FBOPRO Procurement
*Program:	PG00363	General University Administration (51)
*Project:	PJ000001	General Project
Assignee:		
Spend Category:	SC204	Freight Shipping and Delivery
*Requester:	13701189	Minor, Przemyslaw Thomas -- CC0047.FBOFIN Business

NOTE: The Requester is the individual who requested that the package be shipped. This information captured in a structured way to facilitate reporting on data and improves the ability to provide financial reviewers with complete "initiator/Preparer" information on all University transactions.

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21. Select the Special Instructions requested.

Special Instructions
(Additional charges may apply for some special services)
 Material Transfer Agreement (MTA) MTA Number :
 Return Shipment (FedEx, UPS only) Hold at Station (FedEx, UPS only)
 Saturday Delivery (FedEx, UPS only) Residential Delivery (FedEx, UPS only)
 Signature Required Signature Release (FedEx, UPS, LSO only)
Declared Value: (USD)
[Help](#)

NOTE: Additional charges may apply for some special services and are not available from all shipping carriers. When scheduling a pickup, please allow at least 2 hours between the Shipment Ready time and Business close time.

22. Enter Customs Information including Customs Value and Declared Value (for insurance purposes if applicable) required for this package.

Customs Information
(Additional fields for customs information)
Customs Value: (xxxx USD) Terms of Sale: ?
Declared Value: (xxxx USD) Certificate Of Origin:

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23. Select the Email Notifications requested.

NOTE: If you choose to Notify Shipper, Notify Recipient, Notify Shipper on Delivery, or Notify Others on Delivery, you will need to enter an email address, email addresses need to be entered for each of the requested Email Notifications.

Email Notifications
Email notifications will be sent free of charge.
 Notify Shipper on Order Notify Recipient on Order Notify Shipper on Delivery Notify Others on Delivery
 Notify Shipper on Exceptions
EGB:
Start Over Ship Show Quote

24. Click Show Quote.

25. Select a shipping Carrier, Service, and Rate from the list of options provided.

- Shipping Carrier options will be displayed from the least expensive to the most expensive option.

NOTE: Prices vary from Carrier to Carrier and between Services provided by the same Carrier. A breakdown of estimated charges will be displayed on the right side of the window. The Transaction Charge will not be billed to the charging provided.

Service	Commitment
<input checked="" type="radio"/> FedEx International Economy	STD: 2 to 3 business days ACT: by
<input type="radio"/> FedEx International Priority	STD: Bus. centers in 24 to 48 hours ACT: by
<input type="radio"/> UPS Worldwide Saver	STD: End of 3rd business day ACT: Click here for Actual Commitment
<input type="radio"/> UPS Worldwide Expedited	STD: End of 5th business day ACT: Click here for Actual Commitment

Edit Shipment Ship

26. Click Ship.

27. Click Print Airwaybill.

Order #: 101088866
Tracking #: 785506677340
Shipment Information

Origin	Destination	Package Information	Workday Information	Scan Activity	Amount
Yale John Smith 25 Science Park 5th Floor New Haven CT 06511-1968 United States	Bermuda Bio Station of Research 17 Biological Lane Ferry Reach Saint Georges Bermuda	2/14/2019 FedEx International Economy CUSTOM 5 lbs PK	Company: CO01 Yale Designated: YD000002 Cost Center: CC0075 Program: PG00400 Project: PJ000001 Spend Category: SC204 Requester ID: 13429007	No information at this time	\$26.09

Product Name: Documents Product Classification: Documents
Gross Weight: 4 LB
Net Value: 1 USD
Quantity: 1 PCS
ECCN#: EAR99
ECCN Check: N/A

Total for this shipment \$26.09

Cancel Shipment Print Airwaybill Print Documents Export Checklist
Schedule Pickup Supporting Documents Shipment History

Express Shipping powered by eShipGlobal

28. Click Print Airwaybill.

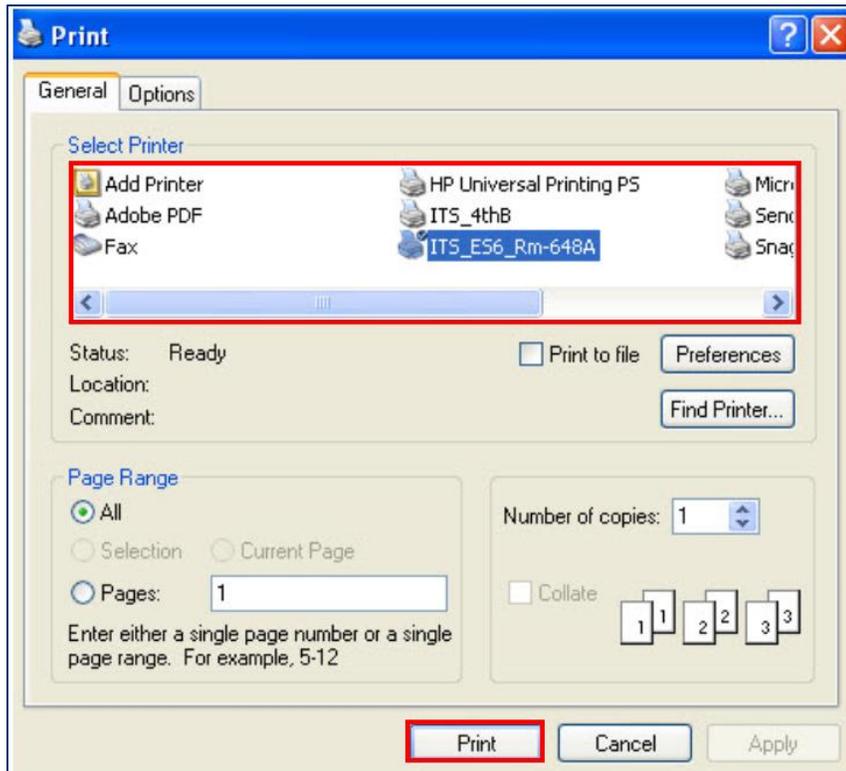
- Paper labels will print on locally installed printers, network printers, or multi-function devices.

Print Airwaybill	20 456-7890 m	Origin ID: EFBA	FedEx Express	Ship Date: 14FEB19 AwtWgt: 5.00 LB CAD: 102722453NWSX02500	Dim: 4 X 5 X 6 IN
To: 25 Science Park 5th Floor New Haven, CT 06511 UNITED STATES				REF: DESC-1: Documents DESC-2: DESC-3: DESC-4: EEI: NO EEI 30.37(a) COUNTRY MFG: US CARRIAGE VALUE: 0.00 USD CUSTOMS VALUE: 1.00 USD T/C: S ***** D/T: S ***** SIGN: John Smith EIN/VAT: PKG-YOUR PKG	
SHIP TO: 4412571888		BILL SENDER			
Bermuda Bio Station of Research 17 Biological Lane Ferry Reach Saint Georges, BM				INTL ECONOMY	
		TRK# 7855 0667 7340 0436			
<small>These commodities, technology, or software were exported from the United States in accordance with the export administration regulations. Diversion contrary to United States law prohibited.</small>				<small>INTL ECONOMY</small>	
<small>The Warsaw Convention may apply and will govern and in most cases limit the liability of Federal Express for loss or delay of or damage to your shipment. Subject to the conditions of the contract.</small>					
CONSIGNEE COPY- PLEASE PLACE IN FRONT OF POUCH				<small>5910000000000</small>	

NOTE: When the Shipping Label is printed, fold the paper in half and insert it into the plastic sleeve of your envelope. The Airway bill information should be facing through the window so that it can be easily scanned by the Carrier. Print 3 copies of the Airway Bill for international air shipments and 5 copies for international FedEx Ground shipments.

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29. Select the Printer where you would like to print the shipping label. Then click Print.



30. Close out the Print Label Screen to return to the My Shipments window.



Express Shipping powered by eShipGlobal

31. Click Print Documents to print necessary Customs documents.

Order #: 101088866

Tracking #: 785506677340

Shipment Information	Package Information	Workday Information	Scan Activity	Amount	
Origin Yale John Smith 25 Science Park 5th Floor New Haven CT 06511-1968 United States	Destination Bermuda Bio Station of Research 17 Biological Lane Ferry Reach Saint Georges Bermuda	Package Information FedEx 2/14/2019 FedEx International Economy CUSTOM 5 lbs PK	Workday Information Company: CO01 Yale Designated: YD000002 Cost Center: CC0075 Program: PG00400 Project: PJ000001 Spend Category: SC204 Requester ID: 13429087	Scan Activity No information at this time.	Amount \$26.09

Product Name: Documents
Product Classification: Documents

Total for this shipment: \$26.09

Buttons: Cancel Shipment, Print Airwaybill, **Print Documents**, Export Checklist, Schedule Pickup, Supporting Documents, Shipment History

32. Click Print Documents.

- Select the printer, then click Print.
- Close out the Print Documents to return to the My Shipments window.

PAGE 1 OF 1

COMMERCIAL INVOICE

Print Documents

Date Shipped:	2/14/2019	Air Waybill No:	785506677340
Shipper Tax ID/EIN:			
SHIPPER NAME AND ADDRESS	CONSIGNEE NAME AND ADDRESS		

NOTE: Print 3 copies of the Commercial Invoice and other customs related forms for international air shipments and 5 copies for international FedEx Ground shipments to Canada or Mexico. Include the copies with the Shipping Label.

[Return to Table of Contents](#)

Express Shipping powered by eShipGlobal

CREATING A DOMESTIC SHIPPING LABEL FOR A RESEARCH SHIPMENT

Overview

- Use this chapter to create a shipping label for a domestic package that contains a biological material.
- This chapter will provide an example of how to ship an exempt biological material packaged with dry ice.
- Certain shipments may require training and/or may be routed for approvals. The system will notify you if your shipment requires you to take additional training, or if it needs to be approved.
- For additional information and FAQs for eShipGlobal, go to the [eShipGlobal information on "It's Your Yale"](#).

Key Points

- eShipGlobal provides one easy-to-use interface to create shipping labels for FedEx, UPS, and USPS (flat rate shipping). This third-party service allows you to review shipping costs at Yale contracted rates and choose the most cost-effective shipping solution.
- Using the eShipGlobal application ensures the proper purchasing protocol is followed by using online validation of the Yale COA Charging Instructions and Requester on every transaction. Each transaction is tied back to Yale Financial Statements through the tracking number and charging and Requester.
- To improve compliance, eShipGlobal is integrated with Yale's TMS system. When you log in with your Yale NetID and password, the system provides automatic training verification.
 - Training courses for biological substances and dry ice packages are available online. In most cases, if you require training, you will be able to complete the training requirement and ship your package in the same day. Also, the system will present you message with exact course / courses that you will need to take to get the desired training level, to be able to create that shipment.
- After 30 minutes of inactivity, you will automatically be logged out of the eShipGlobal system.

Shipping Carriers

Contracted domestic rates for shipping research materials are available with FedEx.

Packaging

- When selecting Custom Packaging as the packaging Type, provide approximate weights and container sizes.
 - All packages are weighed and measured by the shipping carrier selected; prices will be adjusted according by the carrier if necessary.
- The [Medical School Stockroom](#) (Sterling Hall of Medicine, 333 Cedar Street, SHM I-E7) and Kline Biology Tower (219 Prospect Street, KBT C-11) have boxes available for most shipments containing biological materials.
- Supplies are also available on Workday with Access to SciQuest Catalog Content. Click on Favorites and then locate the Research Materials Shipping Supplies link from the left-hand navigation.

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Example: Shipping Exempt Biological Material Packaged with Dry Ice

1. Click **Ship To** located in the navigation menu at the top of your eShipGlobal window.
 - Research materials are generally defined as materials that are used in laboratory settings such as animals, biological (cultures or stocks of human or animal pathogens, select agents or toxins, human or animal materials, genetically modified microorganisms, vectors, plasmids, etc.), chemical or radioactive, and dry-ice.
 - Some research materials may not necessarily be hazardous but become regulated materials once they are transported.



2. Indicate that you are shipping research materials by clicking **Yes**.

Does your shipment contain any of the following:

- Biological Materials
- Chemicals
- Radioactive Materials
- Dry Ice

Yes No

3. Choose **Domestic**.

Does your shipment contain any of the following:

- Biological Materials
- Chemicals
- Radioactive Materials
- Dry Ice

Yes No

Please select the shipment type below:

Domestic International Intra-Campus Self-Transport

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RESEARCH MATERIAL SHIPPING

Step 1 : Material Classification and Training Verification

Which of the following materials will be part of your shipment? (Check all that apply)

- BIOLOGICAL MATERIALS**
(May include dry ice, glycerol, and/or DMSO. If other preservative is used please check Chemicals as well.)
- CHEMICALS
- RADIOACTIVE MATERIALS
- NEWLY SYNTHESIZED NON-HAZARDOUS CHEMICALS
- SPECIAL PROVISION A180
- SPECIAL PROVISION A152 (DRY SHIPPERS)

Start Over Continue

4. After user selects the shipment type the certification pop-up message is presented, the user needs to read it, check the box – “I agree to the above requirements” and click either **Confirm Shipment** or **Cancel Shipment**.
5. Classify the material in your shipment.
 - Check all that are applicable.
6. Click **Continue**.
7. Select the appropriate material name for the biological material.
 - If you have completed the necessary training for this exempt biological material, you will see a confirmation of your training.
 - If you have not completed the necessary training, the system will pop up a message with exact course(s) that you will need to take to complete the required training level for your shipment. Training courses for biological substances and dry ice packages are available online. In most cases, if you require training, you will be able to complete the training requirement and ship your package in the same day.

RESEARCH MATERIAL SHIPPING

Step 1 : Material Classification and Training Verification

BIOLOGICAL MATERIAL SELECTION

Please complete the questionnaire below to proceed

Material Name: Select Material

Start Over Reset Continue Undo Last Action

8. Select the appropriate Microorganism or Prion for the biological material.

RESEARCH MATERIAL SHIPPING

Step 1 : Material Classification and Training Verification

BIOLOGICAL MATERIAL SELECTION

Please complete the questionnaire below to proceed

Material Name:

Select Microorganism or Prion:

[Start Over](#)

[Reset](#)

[Continue](#)

[Undo Last Action](#)

9. Answer the questions related to the biological material.

Yes	No	Does the material contain a wild type bacterium, fungus, parasite, prion, protozoa or virus?
<input type="radio"/>	<input checked="" type="radio"/>	
Yes	No	Does this material contain a genetically modified microorganism?
<input type="radio"/>	<input checked="" type="radio"/>	
Yes	No	Does the material contain a genetically modified organism or is the material genetically modified?
<input type="radio"/>	<input checked="" type="radio"/>	
Yes	No	Have nucleic acids of any type from a microorganism or prion been introduced into the genetically modified organism?
<input type="radio"/>	<input checked="" type="radio"/>	
Yes	No	Does the material contain a plasmid or vector?
<input type="radio"/>	<input checked="" type="radio"/>	
Yes	No	Is there a high probability that the material contains a microorganism or prion?
<input type="radio"/>	<input checked="" type="radio"/>	
Yes	No	Does this shipment include dry ice?
<input checked="" type="radio"/>	<input type="radio"/>	

10. Click **Continue**.

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11. Enter the **Material Name**, Net Weight or Volume, and **Net Value** of the substance that you plan to ship.

Material Entry

Material Classification: Exempt Human Specimen

***Material Name:** Human Urine

Maximum Quantity Per Inner Receptacle: 1 ml (Max. Inner Qty: NA)

***Total Quantity in Package:** 1 ml (Max. Total Qty: NA)

¹Net Value in USD (Min. 1): 1

Does the material contain any chemical preservative?

¹Enter the total value of items shipped in each classification.

[Start Over](#) [Add another material](#) [Continue](#)

*NOTE: For this example, **Total Quantity in Package** needs to include weight of the dry ice.*

12. Click **Continue**.

13. Confirm or edit Sender's location.

- Only the Senders physical location can be modified. The Company and Contact information cannot be changed because it is tied to the person who logged into the system. This staff member has had their training levels validated and the person who is expected to be making the shipping request. The Shipper is also expected to be the most knowledgeable about the material being shipped.

Required fields are indicated by an asterisks. All other fields are optional. Please complete the form and click on "Save Changes".

Edit Address

***Company/Contact Name:** Yale

Alternate Contact Name: John Smith

***Address 1:** 25 Science Park

Address 2: 5th Floor

***City:** New Haven

²State/Province: Connecticut

Zip: 06511-1968

Country: United States

***Phone:** 123-456-7890

Email: jsmith@eshipglobal.com

[Go Back](#) [Save Changes](#)

14. Click **Save Changes**.

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15. Accept today's date (by default) or enter a future date in the **Shipping Date** field.

- To change the Shipping Date, click in the **Shipping Date** box and enter a new Shipping Date.
- You can also click on the calendar icon located on the right-hand side of the **Shipping Date** field to select the date from the calendar.
- Labels can be printed in advance.
- The shipping date selected cannot exceed 9 days from today's date.

Sender Information
(Select a sender from the dropdown list)

Yale, John Smith **Shipping Date:** 02/13/2019
(MM/DD/YYYY)

16. Click on **Load from Address Book** to select a Recipient from the saved Address Book and go to next step.

- [Go to step 20](#) to enter a new Recipient.

Recipient Information
(Please enter recipient information or choose from saved recipient addresses by clicking on the 'Load from Address Book' button)

Add to Address Book

*Company/Contact Name:

Alternate Contact Name:

*Address 1:

Address 2:

*City:

*State: Select State

*Zip:

Country: United States

*Phone:

Email:

If you would like to validate the address you entered, click here:

17. Type **Search** criteria in the field provided. Then click **Find**.

Search for: Yale Location: From To

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

NOTE: You can navigate the Address Book using the letters listed at the top of the window or using the Search feature. Please refer to the Managing Your Address Book quick chapter for more detail.

18. Click to select the address that you would like to use as the Recipient.

	Company/Contact <input type="button" value="v"/>	Alternate Contact	Address	City/State	Zip	Country
<input checked="" type="checkbox"/>	Yale University		150 Munson Street	New Haven CT	06520	United States

Express Shipping powered by eShipGlobal

19. Click Ship To and [go to step 23](#).

- Recipient information will automatically be entered in the appropriate fields.

	Company/Contact vv	Alternate Contact	Address	City/State	Zip	Country
<input checked="" type="checkbox"/>	Yale University		150 Munson Street	New Haven CT	06520	United States

20. Enter the Recipient information for the delivery in the fields provided.

- If there is a Company Name, enter it in the **Company / Contact Name** box and then address the package to an individual by entering the Recipient contact name in the **Alternate Contact Name** box.
- If the package is intended for residential delivery, enter the Recipient contact name in the **Company / Contact Name** box.

Recipient Information

(Please enter recipient information or choose from saved recipient addresses by clicking on the 'Load from Address Book' button)

Add to Address Book

*Company/Contact Name:

Alternate Contact Name:

*Address 1:

Address 2:

*State: ▼

Country: ▼

*Phone:

Email:

*City:

*Zip:

If you would like to validate the address you entered, click here

Note: Fields marked with asterisks (*) are required.

21. To add the address being entered to the saved Address Book, click in the box next to **Add to Address Book** or leave blank if the address will not be needed for future deliveries.

Express Shipping powered by eShipGlobal

22. Click **Validate Address** to confirm the validity of the entry. After confirming the address, click **Close**.

- This is available for domestic/US addresses only.
- If address verification fails, you can still attempt to ship to this address.

Recipient Information
(Please enter recipient information or choose from saved recipient addresses by clicking on the 'Load from Address Book' button)

[Load from Address Book](#)

Add to Address Book

*Company/Contact Name:

Alternate Contact Name:

*Address 1:

Address 2:

*State:

*City:

Country:

*Zip:

*Phone:

Email:

If you would like to validate the address you entered, click here [Validate Address](#)

NOTE: Enter the Recipients email address in the Ship To: section if you would like to notify the Recipient of delivery.

23. Select the type of package from the **Type** drop down-list. Then provide a **Shipment Reference** if applicable.

- Package Types
 - Fiberboard box: Brand new, unused, UN certified package (different sizes available).
 - Plastic case: UN certified package (different sizes available).
 - Customer packaging: Packaging not provided by the shipping carrier.

Package Information
(Select Package type and Service from the dropdown list)

No. of pkgs. for each address above:

Identical Non-Identical

*Type:

Service:

*Total Pkg Weight: (lbs)

Dimensions: x x (inches)

Shipment Reference:

[Help](#)

Express Shipping powered by eShipGlobal

24. Enter the approximate **Weight** and **Dimensions** of the package.

Package Information
(Select Package type and Service from the dropdown list)

No. of pkgs. for each address above: 1 Identical Non-Identical

*Type: Fibreboard Box Service: Select a service

***Total Pkg Weight: 5 (lbs) Dimensions: 4 x 5 x 6 (inches)**

Shipment Reference:

[Help](#)

25. Enter or select the COA instructions for this shipment.

Cost Allocation

Select a Charging Instructions:

Save Profile Charging Instructions Profile Name:

- All transactions must specify a Grant or Gift or Yale Designated.
- Company, Cost Center, Program, Project, and Requester are required on all transactions.
- Assignee is optional.
- You may either enter the charging segment code (e.g., CC0501 for Cost Center) or search for it by name (e.g., "Physics" will present a list of all cost centers that include "Physics" in the name).
- If you are preparing the transaction on behalf of someone else, specify that person by last name as the Requester. Otherwise, specify yourself as the Requester.

*Company:	<input type="text" value="CO01"/>	<input type="text" value="Yale University"/>
Grant:	<input type="text"/>	<input type="text"/>
Gift:	<input type="text"/>	<input type="text"/>
Yale Designated:	<input type="text" value="YD000002"/>	<input type="text" value="General Appropriations - Central Program Support"/>
*Cost Center:	<input type="text" value="CC0075"/>	<input type="text" value="FBOPRO Procurement"/>
*Program:	<input type="text" value="PG00363"/>	<input type="text" value="General University Administration (51)"/>
*Project:	<input type="text" value="PJ000001"/>	<input type="text" value="General Project"/>
Assignee:	<input type="text"/>	<input type="text"/>
Spend Category:	<input type="text" value="SC204"/>	<input type="text" value="Freight Shipping and Delivery"/>
*Requester:	<input type="text"/>	<input type="text"/>

NOTE: You can elect to have a Third Party, or the Recipient of the package pay for delivery. Enter the charging as a backup funding source. Then choose Third Party or Recipient from the Bill To drop-down list. Enter the Recipient / Third Party Account Number and Zip Code associated with the Recipient / Third Party Account Number in the boxes provided.

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26. Type in the last name of the **Requester** who requested the package delivery. Then select the appropriate person from the list of options provided.
- You can also check Save Profile and Create a Charging Instructions Profile Name from this screen.

Cost Allocation

Select a Charging Instructions:

Save Profile Charging Instructions Profile Name:

- All transactions must specify a Grant or Gift or Yale Designated.
- Company, Cost Center, Program, Project, and Requester are required on all transactions.
- Assignee is optional.
- You may either enter the charging segment code (e.g., CC0501 for Cost Center) or search for it by name (e.g., "Physics" will present a list of all cost centers that include "Physics" in the name).
- If you are preparing the transaction on behalf of someone else, specify that person by last name as the Requester. Otherwise, specify yourself as the Requester.

*Company:	<input type="text" value="CC001"/>	Yale University
Grant:	<input type="text"/>	
Gift:	<input type="text"/>	
Yale Designated:	<input type="text" value="YD000002"/>	General Appropriations - Central Program Support
*Cost Center:	<input type="text" value="CC0075"/>	FBOPRO Procurement
*Program:	<input type="text" value="PG00363"/>	General University Administration (51)
*Project:	<input type="text" value="PJ000001"/>	General Project
Assignee:	<input type="text"/>	
Spend Category:	<input type="text" value="SC304"/>	Freight Shipping and Delivery
*Requester:	<input type="text" value="13701189"/>	Minor, Przemyslaw Thomas -- CC0047 FBOFIN Business

NOTE: The Requester is the individual who requested that the package be shipped. This information captured in a structured way to facilitate reporting on data and improves the ability to provide financial reviewers with complete "initiator/Preparer" information on all University transactions.

27. Select any optional **Special Instructions** or enter a **Declared Value** (for insurance purposes if applicable) required for this package.
- Additional charges may apply for some special services.

Special Instructions

(Additional charges may apply for some special services)

Material Transfer Agreement (MTA) MTA Number :

Saturday Delivery

Signature Required

Signature Release

Dangerous Goods Dangerous Goods Type: [Help](#)

Dry Ice (Express shipments only) *Dry Ice Weight: (lbs) [Help](#)

Overpack

Declared Value: (USD)

[Help](#)

Express Shipping powered by eShipGlobal

28. If dry ice is included in your package, click Dry Ice and indicate how many pounds will be included.

TIP: The weight of dry ice should not exceed the total package weight you entered previously.

Special Instructions

(Additional charges may apply for some special services)

Material Transfer Agreement (MTA) MTA Number :

Saturday Delivery

Signature Required

Signature Release

Dangerous Goods Dangerous Goods Type: [Help](#)

Dry Ice (Express shipments only) *Dry Ice Weight: (lbs) [Help](#)

Overpack

Declared Value: (USD)

[Help](#)

29. Select optional Email Notifications requested.

- If you choose to Notify Shipper, Notify Recipient, Notify Shipper on Delivery, or Notify Others on Delivery, you will need to enter an email address, email addresses need to be entered for each of the requested Email Notifications.

Email Notifications

(Email notifications will be sent free of charge)

Notify Shipper on Order Notify Recipient on Order Notify Shipper on Delivery Notify Others on Delivery

Notify Shipper on Exceptions

[Help](#)

30. Click **Show Quote**.

Email Notifications

(Email notifications will be sent free of charge)

Notify Shipper on Order Notify Recipient on Order Notify Shipper on Delivery Notify Others on Delivery

Notify Shipper on Exceptions

[Help](#)

NOTE: There may be a substantial increase or difference in price for an 8:00 AM delivery as opposed to a 10:30 AM delivery from the same carrier. A breakdown of estimated charges will be displayed on the right side of the window or when you hover the Contracted Rate. The Transaction Charge will not be billed to the charging provided.

31. Review the package information.

- If changes are required, click **Edit Shipment** and return to the main form to make corrections.
- If the information is correct, continue to next step.

Express Shipping powered by eShipGlobal

32. Select a shipping Carrier, Service, and Rate from the list of options provided.

- Shipping Carrier options will be displayed from the least expensive to the most expensive option.

NOTE: After 3 PM, FedEx Overnight 8 AM may not show as an available option for the next business day.

33. Click **Ship**.

34. Click **Complete Shipment**.

Shipment Information					
Origin	Destination	Package Information	Workday Information	Scan Activity	Amount
Yale John Smith 25 Science Park 5th Floor New Haven CT 06511-1968 United States	Yale University 150 Munson Street New Haven CT 06511 United States	FedEx 2/18/2019 FedEx Standard Overnight CUSTOM 5 lbs DI - 4 lbs PK	Company: CO01 Yale Designated: YD000002 Cost Center: CC0075 Program: PG00400 Project: PJ000001 Spend Category: SC204 Requester ID: 17429590	No information at this time.	\$15.08
Material Name		Material Classification			
Human Urine		EXEMPT HUMAN SPECIMEN		Proper shipping name: UN NO: Preservative: Net Weight/Volume: 1 ml Net Value: 1 USD Risk Agent or Toxins: N/A Show Transaction details	
Total for this shipment					\$15.08

35. Read the Requirements for Exempt Human or Animal Specimen Packages.

36. Read the Requirements for Dry Ice Shipments.

37. Click in the box next to the statement that you will follow the steps indicated in the checklist when preparing the package for this shipment.

Exempt human or animal specimens with Dry Ice

Shipper name
Address
Telephone number

Consignee name
Address
Telephone number

Exempt human or animal specimens

Dry Ice
UN1845
___ kgs



By checking this box you agree to follow the steps indicated above when preparing the package for this shipment

38. Click **Continue**.

Express Shipping powered by eShipGlobal

39. Complete Shipment

- Click on the Complete Shipment button.
 - Review the checklists.
 - Check the box at the bottom agreeing to terms.
 - Click the Continue button.
- The page will close and all of the buttons for printing the labels and documents will be available to facilitate the completion of the shipment.

Shipment Information					
Origin	Destination	Package Information	Workday Information	Scan Activity	Amount
Yale John Smith 25 Science Park 5th Floor New Haven CT 06511-1968 United States	Yale University 150 Munson Street New Haven CT 06511 United States	 2/18/2019 FedEx Standard Overnight CUSTOM 5 lbs DI - 4 lbs PK	Company: CO01 Yale Designated: YD000002 Cost Center: CC0075 Program: PG00400 Project: PJ000001 Spend Category: SC204 Requester ID: 17429590	No information at this time.	\$15.08
Material Name	Material Classification		Proper shipping name:		
Human Urine	EXEMPT HUMAN SPECIMEN		UN NO: Preservative: Net Weight/Volume: 1 ml Net Value: 1 USD Risk Agent or Toxins: N/A Show Transaction details		
Total for this shipment					\$15.08
<input type="button" value="Cancel Shipment"/> <input type="button" value="Print Airwaybill"/> <input type="button" value="Print all Required Labels"/> <input type="button" value="Packaging Instructions"/> <input type="button" value="Schedule Pickup"/> <input type="button" value="Supporting Documents"/> <input type="button" value="Shipment History"/>					

40. Print Airwaybill

- Click on the **Print Airwaybill** button and [go to step 43](#).

Shipment Information					
Origin	Destination	Package Information	Workday Information	Scan Activity	Amount
Yale John Smith 25 Science Park 5th Floor New Haven CT 06511-1968 United States	Yale University 150 Munson Street New Haven CT 06511 United States	 2/18/2019 FedEx Standard Overnight CUSTOM 5 lbs DI - 4 lbs PK	Company: CO01 Yale Designated: YD000002 Cost Center: CC0075 Program: PG00400 Project: PJ000001 Spend Category: SC204 Requester ID: 17429590	No information at this time.	\$15.08
Material Name	Material Classification		Proper shipping name:		
Human Urine	EXEMPT HUMAN SPECIMEN		UN NO: Preservative: Net Weight/Volume: 1 ml Net Value: 1 USD Risk Agent or Toxins: N/A Show Transaction details		
Total for this shipment					\$15.08
<input type="button" value="Cancel Shipment"/> <input type="button" value="Print Airwaybill"/> <input type="button" value="Print all Required Labels"/> <input type="button" value="Packaging Instructions"/> <input type="button" value="Schedule Pickup"/> <input type="button" value="Supporting Documents"/> <input type="button" value="Shipment History"/>					

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41. Schedule Pickup

- Click on **Schedule Pickup** and [go to step 43](#)

Shipment Information					
Origin	Destination	Package Information	Workday Information	Scan Activity	Amount
Yale John Smith 25 Science Park 5th Floor New Haven CT 06511-1968 United States	Yale University 150 Munson Street New Haven CT 06511 United States	FedEx 2/18/2019 FedEx Standard Overnight CUSTOM 5 lbs DI - 4 lbs PK	Company: CO01 Yale Designated: YD000002 Cost Center: CC0075 Program: PG00400 Project: PJ000001 Spend Category: SC204 Requester ID: 17429590	No information at this time.	\$15.08
Material Name	Material Classification		Proper shipping name:		
Human Urine	EXEMPT HUMAN SPECIMEN		UN NO: Preservative: Net Weight/Volume: 1 ml Net Value: 1 USD Risk Agent or Toxins: N/A Show Transaction details		
Total for this shipment					\$15.08
<input type="button" value="Cancel Shipment"/> <input type="button" value="Print Airwaybill"/> <input type="button" value="Print all Required Labels"/> <input type="button" value="Packaging Instructions"/> <input type="button" value="Schedule Pickup"/> <input type="button" value="Supporting Documents"/> <input type="button" value="Shipment History"/>					

- Please retain the Pickup Confirmation Number for your records. Your package will be picked up only if you have a Pickup Confirmation Number.

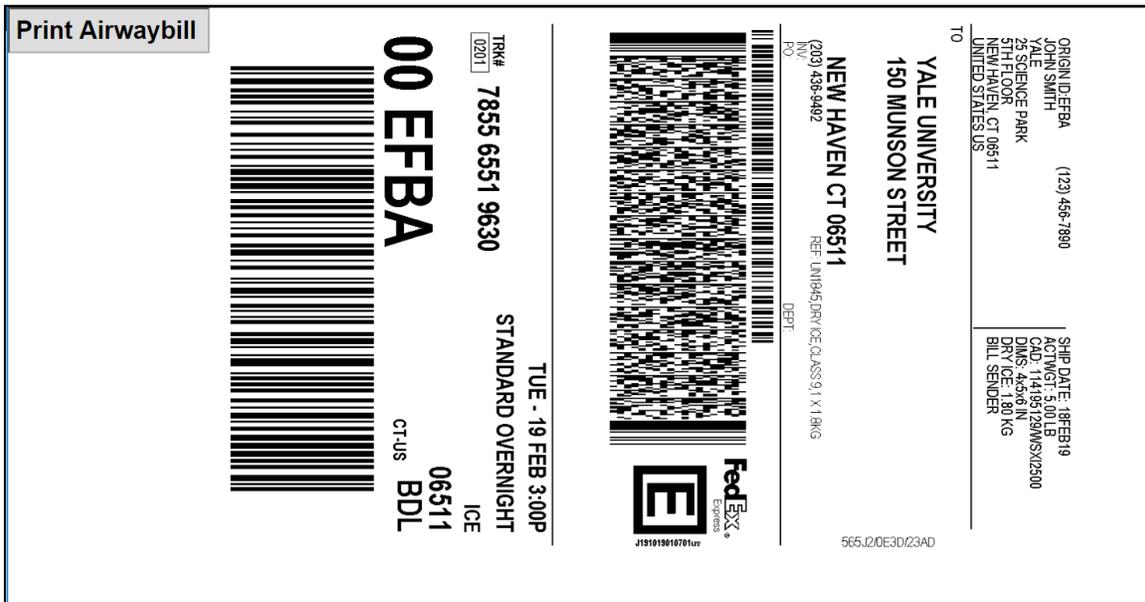
42. Cancel Shipment

- Check the checkbox next to the tracking number that you want to cancel.
- Click **Cancel Shipment**.
- After your label has been cancelled, you will see a "x" in the left-hand column of the shipment history and on the label summary.

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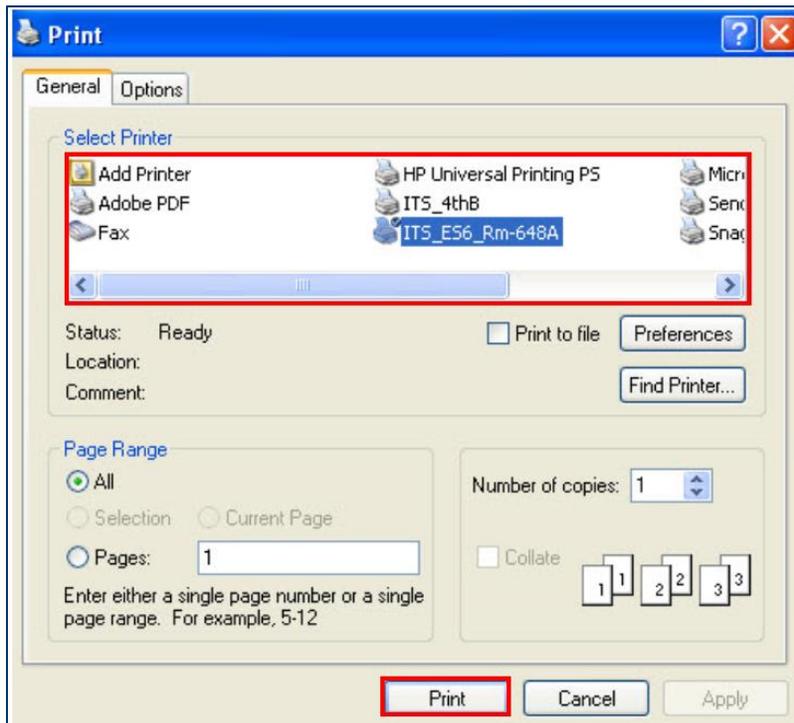
43. Click Print Airwaybill.

- Paper labels will print on locally installed printers, network printers, or multi-function devices.



NOTE: When the Shipping Label is printed, fold the paper in half and insert it into the plastic sleeve of your envelope. The Airway bill information should be facing through the window so that it can be easily scanned by the Carrier.

44. Select the Printer where you would like to print the shipping label. Then click Print.



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45. Close out the Print Label Screen to return to the My Shipments window.

46. Click Packaging Instructions & Labels.

Shipment Information					
Origin	Destination	Package Information	Workday Information	Scan Activity	Amount
Yale John Smith 25 Science Park 5th Floor New Haven CT 06511-1968 United States	Yale University 150 Munson Street New Haven CT 06511 United States	FedEx 2/18/2019 FedEx Standard Overnight CUSTOM 5 lbs DI - 4 lbs PK	Company: CO01 Yale Designated: YD000002 Cost Center: CC0075 Program: PG00400 Project: PJ000001 Spend Category: SC204 Requester ID: 17429590	No information at this time.	\$15.08
Material Name	Material Classification		Proper shipping name:		
Human Urine	EXEMPT HUMAN SPECIMEN		UN NO: Preservative: Net Weight/Volume: 1 ml Net Value: 1 USD Risk Agent or Toxins: N/A Show Transaction details		
Total for this shipment					\$15.08
<div style="display: flex; justify-content: space-around; align-items: center;"> Cancel Shipment Print Airwaybill Print all Required Labels Packaging Instructions </div> <div style="display: flex; justify-content: space-around; align-items: center; margin-top: 5px;"> Schedule Pickup Supporting Documents Shipment History </div>					

47. Print the packaging instructions and labels that appear.

- Checklists and labels were created based on your earlier responses to categorize the material you are shipping.

Shipment Information					
Origin	Destination	Package Information	Workday Information	Scan Activity	Amount
Yale John Smith 25 Science Park 5th Floor New Haven CT 06511-1968 United States	Yale University 150 Munson Street New Haven CT 06511 United States	FedEx 2/18/2019 FedEx Standard Overnight CUSTOM 5 lbs DI - 4 lbs PK	Company: CO01 Yale Designated: YD000002 Cost Center: CC0075 Program: PG00400 Project: PJ000001 Spend Category: SC204 Requester ID: 17429590	No information at this time.	\$15.08
Material Name	Material Classification		Proper shipping name:		
Human Urine	EXEMPT HUMAN SPECIMEN		UN NO: Preservative: Net Weight/Volume: 1 ml Net Value: 1 USD Risk Agent or Toxins: N/A Show Transaction details		
Total for this shipment					\$15.08
<div style="display: flex; justify-content: space-around; align-items: center;"> Cancel Shipment Print Airwaybill Print all Required Labels Packaging Instructions </div> <div style="display: flex; justify-content: space-around; align-items: center; margin-top: 5px;"> Schedule Pickup Supporting Documents Shipment History </div>					

48. Cut around the outside border of the label and affix it to a vertical side of the box (not the top or bottom) then cover the label with clear plastic packaging tape.

49. Cut around the outside border of the label, fill in the information in the Dry Ice label, affix it to a vertical side of the box (not the top or bottom) and then cover the label with clear plastic packaging tape.

NOTE: Missing information on this label can result in a returned shipment.

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50. Click **Schedule Pickup**.

Shipment Information					
Origin	Destination	¹ Package Information	Workday Information	Scan Activity	Amount
Yale John Smith 25 Science Park 5th Floor New Haven CT 06511-1968 United States	Yale University 150 Munson Street New Haven CT 06511 United States	FedEx 2/18/2019 FedEx Standard Overnight CUSTOM 5 lbs DI - 4 lbs PK	Company: CO01 Yale Designated: YD000002 Cost Center: CC0075 Program: PG00400 Project: PJ000001 Spend Category: SC204 Requester ID: 17429590	No information at this time.	\$15.08
Material Name	Material Classification		Proper shipping name:		
Human Urine	EXEMPT HUMAN SPECIMEN		UN NO: Preservative: Net Weight/Volume: 1 ml Net Value: 1 USD Risk Agent or Toxins: N/A Show Transaction details		
Total for this shipment					\$15.08
<input type="button" value="Cancel Shipment"/> <input type="button" value="Print Airwaybill"/> <input type="button" value="Print all Required Labels"/> <input type="button" value="Packaging Instructions"/> <input type="button" value="Schedule Pickup"/> <input type="button" value="Supporting Documents"/> <input type="button" value="Shipment History"/>					

51. Choose a pickup date (if other than today) and then select the Shipment Ready Time and Business Close time from the drop-down list of options provided.

- Please allow at least 2 hours between the shipment ready time and business close time.

Scheduling Information	
Choose Pickup date, Shipment ready time and Business close time	
Current time: 10:40:03 PM	
¹ Pickup date:	2/18/2019 ▼
Time Zone:	Eastern ▼
² Shipment ready time:	---Select--- ▼
Business close time:	---Select--- ▼

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52. Edit the address information if necessary. Please include building, floor, or suite numbers where the package is located.

Pickup Location	
Edit Address information for Package(s) to be picked up	
*Contact Name:	<input type="text" value="John Smith"/>
*Company:	<input type="text" value="Yale"/>
*Address:	<input type="text" value="25 Science Park 5th Floor"/>
*City:	<input type="text" value="New Haven"/>
*State:	<input type="text" value="CT"/>
*Zip:	<input type="text" value="06511-1968"/>
Country:	US
*Phone:	<input type="text" value="123-456-7890"/>
Special Instructions:	<input type="text" value="Dangerous Goods"/>

IMPORTANT: Please make sure **Address** field has the complete physical address where the package needs to be picked up from (including building, floor or suite numbers).

53. Edit the Number of Packages to be picked up from the specified location.

Shipment Information	
Edit Number of Packages to be picked up from this location	
Service Type: FedEx Standard Overnight	
*Number of Packages:	<input type="text" value="1"/>
*Total Weight:	<input type="text" value="5"/> lbs

54. Click Submit Pickup.

- Then wait for the Pickup Confirmation Number.
- Your package will only be picked up if you received a Pickup Confirmation Number.

Shipment Information	
Edit Number of Packages to be picked up from this location	
Service Type: FedEx Standard Overnight	
*Number of Packages:	<input type="text" value="1"/>
*Total Weight:	<input type="text" value="5"/> lbs
<input type="button" value="Back to Summary"/> <input style="border: 2px solid red;" type="button" value="Submit Pickup"/>	

55. Click **Back to Summary**.

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CREATING AN INTERNATIONAL SHIPPING LABEL FOR A RESEARCH SHIPMENT

Overview

- Use this chapter to create a shipping label for an international package that contains a research material.
- This chapter will provide an example of how to ship an exempt biological material packaged with dry ice internationally.
- Certain shipments may require training and/or may be routed for approvals. The system will notify you if your shipment requires you to take additional training, or if it needs to be approved.
- For additional information and FAQs for eShipGlobal, go to the [eShipGlobal information on “It’s Your Yale”](#).

Key Points

- eShipGlobal provides one easy-to-use interface to create shipping labels for FedEx, UPS, and USPS (flat rate shipping). This third-party service allows you to review shipping costs at Yale contracted rates and choose the most cost-effective shipping solution.
- Using the eShipGlobal application ensures the proper purchasing protocol is followed by using online validation of the Yale charging and Requester on every transaction. Each transaction is tied back to Yale Financial Statements through the tracking number and charging and Requester.
- To improve compliance, eShipGlobal is integrated with Yale’s TMS system. When you log in with your Yale NetID and password, the system provides automatic training verification.
 - Training courses for biological substances and dry ice packages are available online. In most cases, if you require training, you will be able to complete the training requirement and ship your package in the same day.
- After 30 minutes of inactivity, you will automatically be logged out of the eShipGlobal system.

Shipping Carriers

Contracted domestic rates for shipping research materials are available with FedEx.

Packaging

- When selecting Custom Packaging as the packaging Type, provide approximate weights and container sizes.
 - All packages are weighed and measured by the shipping vendor selected; prices will be adjusted according by the carrier if necessary.
- The [Medical School Stockroom](#) (Sterling Hall of Medicine, 333 Cedar Street, SHM I-E7) and Kline Biology Tower (219 Prospect Street, KBT C-11) have boxes available for most shipments containing biological materials. Supplies are also available on Workday with Access to SciQuest Catalog Content. Click on Favorites and then locate the Research Materials Shipping Supplies link from the left-hand navigation.

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1. Click **Ship To** located in the navigation menu at the top of your eShipGlobal window.
 - Research materials are generally defined as materials that are used in laboratory settings such as animals, biological (cultures or stocks of human or animal pathogens, select agents or toxins, human or animal materials, genetically modified microorganisms, vectors, plasmids, etc.), chemical or radioactive, and dry-ice.
 - Some research materials may not necessarily be hazardous but become regulated materials once they are transported.



2. Indicate that you are shipping research materials. Click **Yes**.

Does your shipment contain any of the following:

- Biological Materials
- Chemicals
- Radioactive Materials
- Dry Ice

Yes No

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3. Choose **International**.

Does your shipment contain any of the following:

- Biological Materials
- Chemicals
- Radioactive Materials
- Dry Ice

Yes No

Please select the shipment type below:

Domestic International Intra-Campus Self-Transport

4. After user selects the shipment type the certification pop-up message is presented. The user needs to read it, check the box – “I agree to the above requirements”, and click either **Confirm Shipment** or **Cancel Shipment**.
5. Classify the material in your shipment.
 - Check all that are applicable.

RESEARCH MATERIAL SHIPPING

Step 1 : Material Classification and Training Verification

Which of the following materials will be part of your shipment? (Check all that apply)

- BIOLOGICAL MATERIALS**
(May include dry ice, glycerol, and/or DMSO. If other preservative is used please check Chemicals as well.)
- CHEMICALS**
- RADIOACTIVE MATERIALS**
- NEWLY SYNTHESIZED NON-HAZARDOUS CHEMICALS**
- SPECIAL PROVISION A180**
- SPECIAL PROVISION A152 (DRY SHIPPERS)**

6. Click **Continue**.

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7. Select the appropriate material name for the biological material.
 - If you have completed the necessary training for this exempt biological material, you will see a confirmation of your training.
 - If you have not completed the necessary training, you will receive a prompt indicating which training you need and a link to complete that training.

RESEARCH MATERIAL SHIPPING

Step 1 : Material Classification and Training Verification

BIOLOGICAL MATERIAL SELECTION

Please complete the questionnaire below to proceed

Material Name:

Start OverResetContinueUndo Last Action

8. Select the appropriate Microorganism or Prion for the biological material.

RESEARCH MATERIAL SHIPPING

Step 1 : Material Classification and Training Verification

BIOLOGICAL MATERIAL SELECTION

Please complete the questionnaire below to proceed

Material Name:

Select Microorganism or Prion:

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9. Answer the questions related to the biological material.

Yes	No	Does the material contain a wild type bacterium, fungus, parasite, prion, protozoa or virus?
<input type="radio"/>	<input checked="" type="radio"/>	
Yes	No	Does this material contain a genetically modified microorganism?
<input type="radio"/>	<input checked="" type="radio"/>	
Yes	No	Does the material contain a genetically modified organism or is the material genetically modified?
<input type="radio"/>	<input checked="" type="radio"/>	
Yes	No	Have nucleic acids of any type from a microorganism or prion been introduced into the genetically modified organism?
<input type="radio"/>	<input checked="" type="radio"/>	
Yes	No	Does the material contain a plasmid or vector?
<input type="radio"/>	<input checked="" type="radio"/>	
Yes	No	Is there a high probability that the material contains a microorganism or prion?
<input type="radio"/>	<input checked="" type="radio"/>	
Yes	No	Does this shipment include dry ice?
<input type="radio"/>	<input checked="" type="radio"/>	
<input type="button" value="Start Over"/> <input type="button" value="Reset"/> <input type="button" value="Continue"/> <input type="button" value="Undo Last Action"/>		

10. Click **Continue**.

11. Enter the **Material Name, Quantity, Net Value**, and any additional fields for the substance that you plan to ship.

Material Entry		
Material Classification: Exempt Animal Specimen		
*Material Name: Animal Chicken eggs		
Maximum Quantity Per Inner Receptacle:	1 ml (Max. Inner Qty: NA)	
*Total Quantity in Package:	1 ml (Max. Total Qty: NA)	
¹ Net Value in USD(Min. 1):	1	
State Variation:		
² Schedule B Number:	0511.99.5050	
*ECCN#:	EAR99	
<input type="checkbox"/> Does the material contain any chemical preservative?		
Enter the total value of items shipped in each classification.		
² Please refer to these links to lookup for Schedule B Number.		
http://uscensus.prod.3ceonline.com/#/p=0		
https://www.census.gov/foreign-trade/schedules/b/index.html		
https://rulings.cbp.gov/		
https://hts.usitc.gov/		
<input type="button" value="Start Over"/> <input type="button" value="Add another material"/> <input type="button" value="Continue"/>		

12. Click **Continue**.

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13. Confirm or edit Sender's location.

- Only the Senders physical location can be modified. The Company and Contact information cannot be changed because it is tied to the person who logged into the system. This staff member has had their training levels validated and is the person who is expected to be making the shipping request. The Shipper is also expected to be the most knowledgeable about the material being shipped.

14. If the shipping location is accurate, [go to step 17](#).

15. Click **Edit**.

Required fields are indicated by an asterisks. All other fields are optional. Please complete the form and click on "Save Changes".

Edit Address

***Company/Contact Name:**

Alternate Contact Name:

***Address 1:**

Address 2:

***City:**

²State/Province:

Zip:

Country:

***Phone:**

Email:

16. Update the physical address information and click **Save Changes**.

17. Accept today's date (by default) or enter a future date in the **Shipping Date** field.

- To change the Shipping Date, click in the **Shipping Date** box and enter a new Shipping Date.
- You can also click on the calendar icon located on the right-hand side of the **Shipping Date** field to select the date from the calendar.
- Labels can be printed in advance.
- The shipping date selected cannot exceed 9 days from today's date.

Sender Information

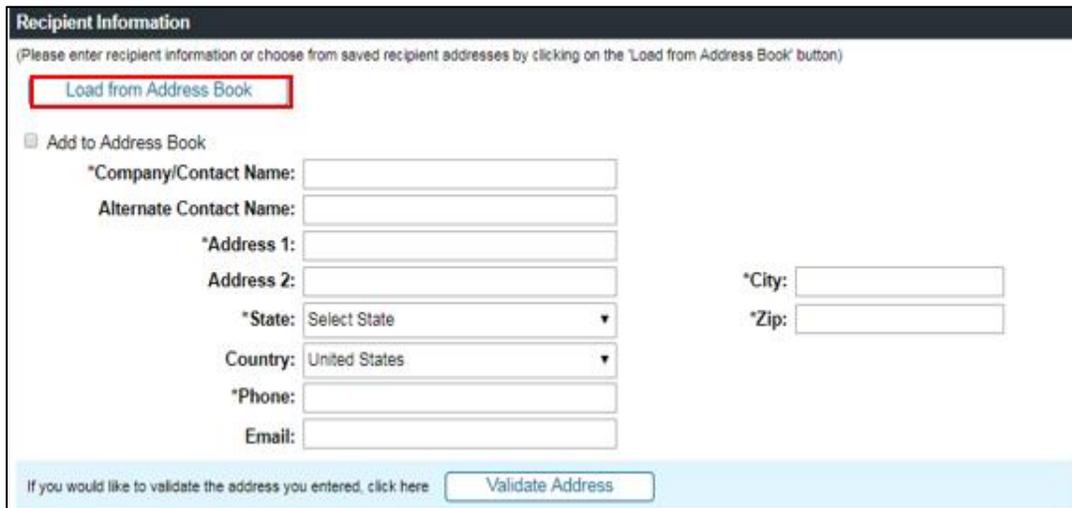
(Select a sender from the dropdown list)

Shipping Date:

(MMDDYYYY)

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18. Click on **Load from Address Book** to select a Recipient from the saved Address Book,
- [Go to step 22](#) to enter a new Recipient.



The form is titled "Recipient Information" and includes a sub-header "(Please enter recipient information or choose from saved recipient addresses by clicking on the 'Load from Address Book' button)". A red box highlights the "Load from Address Book" button. Below it is a checkbox for "Add to Address Book". The form contains several input fields: "*Company/Contact Name:", "Alternate Contact Name:", "*Address 1:", "Address 2:", "*State:" (a dropdown menu currently showing "Select State"), "Country:" (a dropdown menu currently showing "United States"), "*Phone:", and "Email:". To the right of these fields are "*City:" and "*Zip:" input fields. At the bottom, there is a "Validate Address" button and a note: "If you would like to validate the address you entered, click here".

19. Type **Search** criteria in the field provided. Then click **Find**.



The search interface features a "Search for:" input field containing the text "Yale", a "Find" button, and a "Location:" section with radio buttons for "From" and "To". Below the search bar is a navigation bar with letters A through Z and "All". At the bottom, there are buttons for "Delete", "Download", "Edit", "Import File", and "New".

NOTE: You can navigate the Address Book using the letters listed at the top of the window or using the Search feature. Please refer to the [Managing Your Address Book](#) chapter for more detail.

20. Click to select the address that you would like to use as the Recipient.

	Company/Contact	Alternate Contact	Address	City/State	Zip	Country
<input checked="" type="checkbox"/>	Yale University		150 Munson Street	New Haven CT	06520	United States

Buttons:

21. Click Ship To and [go to step 24](#).

- Recipient information will automatically be entered in the appropriate fields.

	Company/Contact	Alternate Contact	Address	City/State	Zip	Country
<input checked="" type="checkbox"/>	Yale University	John Smith	Inge-Beisheim-Platz 1	Berlin BE	10785	Germany

Buttons:

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22. To enter an address, complete the online form by entering the Recipient information for the delivery in the fields provided.
- If there is a Company Name, enter it in the **Company / Contact Name** box and then address the package to an individual by entering the Recipient contact name in the **Alternate Contact Name** box.
 - If the package is intended for residential delivery, enter the Recipient contact name in the **Company / Contact Name** box.

Recipient Information

(Please enter recipient information or choose from saved recipient addresses by clicking on the 'Load from Address Book' button)

[Load from Address Book](#)

Add to Address Book

Country: ? [Click here for address format](#)

*Company/Contact Name:

Alternate Contact Name:

*Address 1:

Address 2:

*City:

State/Province: Zip:

*Phone:

Email:

Fields marked with asterisks (*) are required.

23. To add the address being entered to the saved Address Book, click in the box next to **Add to Address Book** or leave blank if the address will not be needed for future deliveries.
24. Select the type of package from the **Type** drop down-list. Then provide the **Shipment Reference** and Content Description if applicable.
- Package Types
 - Fiberboard box: Brand new, unused, UN certified package (different sizes available).
 - Plastic case: UN certified package (different sizes available).
 - Customer packaging: Packaging not provided by the shipping carrier.

Package Information

(Select Package type and Service from the dropdown list)

No. of pkgs. for each address above: Identical Non-Identical

*Type:

Service:

*Total Pkg Weight: (lbs)

Dimensions: x x (inches)

Shipment Reference:

[Help](#)

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25. Enter the approximate **Weight** and **Dimensions** of the package.

Package Information
(Select Package type and Service from the dropdown list)

No. of pkgs. for each address above: 1

Identical Non-Identical

*Type: Fibreboard Box

Service: Select a service

Total Pkg Weight: 5 (lbs)

Dimensions: 4 x 5 x 6 (inches)

Shipment Reference: _____

[Help](#)

26. Enter the COA or select a saved set of charging instructions identifying where the shipping costs should be charged.

NOTE: You can elect to have a Third Party, or the Recipient of the package pay for delivery. Enter the charging as a backup funding source. Then choose Third Party or Recipient from the Bill To drop-down list. Enter the Recipient / Third Party Account Number and Zip Code associated with the Recipient / Third Party Account Number in the boxes provided.

27. Type in the last name of the **Requester** who requested the package delivery. Then select the appropriate person from the list of options provided.

Cost Allocation

Select a Charging Instructions: Select a profile

Save Profile

Charging Instructions Profile Name: _____

- All transactions must specify a Grant or Gift or Yale Designated.
- Company, Cost Center, Program, Project, and Requester are required on all transactions.
- Assignee is optional.
- You may either enter the charging segment code (e.g., CC0501 for Cost Center) or search for it by name (e.g., "Physics" will present a list of all cost centers that include "Physics" in the name).
- If you are preparing the transaction on behalf of someone else, specify that person by last name as the Requester. Otherwise, specify yourself as the Requester.

*Company:	CO01	Yale University
Grant:		
Gift:		
Yale Designated:	YD000002	General Appropriations - Central Program Support
*Cost Center:	CC0075	FBOPRO Procurement
*Program:	PG00363	General University Administration (51)
*Project:	PJ000001	General Project
Assignee:		
Spend Category:	EC001	Freight Shipping and Delivery
*Requester:	13701189	Minor, Przemyslaw Thomas -- CC0047.FBOFIN Business

NOTE: The Requester is the individual who requested that the package be shipped. This information captured in a structured way to facilitate reporting on data and improves the ability to provide financial reviewers with complete "initiator/Preparer" information on all University transactions.

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28. Select any optional **Special Instructions** or enter a **Declared Value** (for insurance purposes if applicable) required for this package.

- Additional charges may apply for some special services.

Special Instructions
(Additional charges may apply for some special services)
 Material Transfer Agreement (MTA) MTA Number :
 Saturday Delivery
 Signature Required
 Signature Release
 Dangerous Goods Dangerous Goods Type: --Select-- [Help](#)
 Dry Ice (Express shipments only) *Dry Ice Weight: (lbs) [Help](#)
 Overpack
Declared Value: 0 (USD)
[Help](#)

29. If dry ice is included in your package, click Dry Ice and indicate how many pounds will be included.

- TIP: The weight of dry ice should not exceed the total package weight you previously entered.

Special Instructions
(Additional charges may apply for some special services)
 Material Transfer Agreement (MTA) MTA Number :
 Saturday Delivery
 Signature Required
 Signature Release
 Dangerous Goods Dangerous Goods Type: --Select-- [Help](#)
 Dry Ice (Express shipments only) *Dry Ice Weight: 4 (lbs) [Help](#)
 Overpack
Declared Value: 0 (USD)
[Help](#)

30. Select optional Email Notifications requested.

Email Notifications
(Email notifications will be sent free of charge)
 Notify Shipper on Order **Notify Recipient on Order** **Notify Shipper on Delivery** **Notify Others on Delivery**
 Notify Shipper on Exceptions
[Help](#)

NOTE: If you choose to Notify Shipper, Notify Recipient, Notify Shipper on Delivery, or Notify Others on Delivery, you will need to enter an email address, email addresses need to be entered for each of the requested Email Notifications.

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31. Click **Show Quote**.

Email Notifications
(Email notifications will be sent free of charge)

Notify Shipper on Order **Notify Recipient on Order** **Notify Shipper on Delivery** **Notify Others on Delivery**
 Notify Shipper on Exceptions

[Help](#)

NOTE: There may be a substantial increase or difference in price for an 8:00 AM delivery as opposed to a 10:30 AM delivery from the same carrier. A breakdown of estimated charges will be displayed on the right side of the window or when you hover the Contracted Rate. The Transaction Charge will not be billed to the charging provided.

32. In the event the compliance check flags this shipment, click **Submit for Approval**.

- Your shipment will be routed for approval to a designated officer.

Compliance Checker

Please wait while we check this shipment for compliance ...

Validating COA Segments... ✔

Validating company, name and address with RPS database... ✘

below to submit this shipment for approval.

The information entered matched one or more entries in the RPS database as shown below:

PRIDMORE-SMITH, John B. AKA PRIDMORE-SMITH, Bramwell J.
Malabar Fields
Daventry
United Kingdom
Start Date: 12/14/1984
End Date: 12/30/2099
Alert Type: _Y

John Philip SMITH
95661

33. Review the package information.

- If changes are required, click **Edit Shipment** and return to step the main form to make corrections.
- If the information is correct, continue to next step.

34. Select a shipping Carrier, Service, and Rate from the list of options provided.

- Shipping Carrier options will be displayed from the least expensive to the most expensive option.

NOTE: After 3 PM, FedEx Overnight 8 AM may not show as an available option for the next business day.

NOTE: There may be a substantial increase or difference in price for an 8:00 AM delivery as opposed to a 10:30 AM delivery from the same carrier. A breakdown of estimated charges will be displayed on the right side of the window or when you hover the Contracted Rate. The Transaction Charge will not be billed to the charging provided.

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35. Click **Ship**.
36. This shipment has been routed to the designated officer to approve this shipment due to a compliance check. Once approved, you will get an email prompting you to login and complete the shipment.

Please find below summary of your shipment(s). Please follow the instructions given below to print the airwaybill(s), schedule a pickup, or to cancel shipments.

Your request has been submitted to the University's Export Control Officer. Once all necessary reviews have been completed, you will be notified via email by eShipGlobal. Once this has been approved, to complete the shipment, log on to eShipGlobal, print all required documents and complete the shipment.

[Printer friendly]

Order #: 101088912

Tracking #: 785600819830

Shipment Information					
Origin	Destination	Package Information	Workday Information	Scan Activity	Amount
Yale John Smith 25 Science Park 5th Floor New Haven CT 06511-1968 United States	Yale University John Smith Inge-Beisheim-Platz 1 Berlin BE 10785 Germany	FedEx 2/20/2019 FedEx International Economy CUSTOM 5 lbs PK	Company: CO01 Yale Designated: YD000002 Cost Center: CC0075 Program: PG00400 Project: PJ000001 Spend Category: SC204 Requester ID: 11784524	No information at this time.	\$33.60
Material Name Animal Chicken eggs		Material Classification EXEMPT ANIMAL SPECIMEN		Proper shipping name: UN NO: Preservative: Net Weight/Volume: 1 ml Net Value: 1 USD Risk Agent or Toxins: N/A Show transaction details	
Total for this shipment					\$33.60

37. When you receive approval notification and are back in the system, click **Complete Shipment**.

Shipment Information					
Origin	Destination	Package Information	Workday Information	Scan Activity	Amount
Yale John Smith 25 Science Park 5th Floor New Haven CT 06511-1968 United States	Yale University John Smith Inge-Beisheim-Platz 1 Berlin BE 10785 Germany	FedEx 2/20/2019 FedEx International Economy CUSTOM 5 lbs PK	Company: CO01 Yale Designated: YD000002 Cost Center: CC0075 Program: PG00400 Project: PJ000001 Spend Category: SC204 Requester ID: 11784524	No information at this time.	\$33.60
Material Name Animal Chicken eggs		Material Classification EXEMPT ANIMAL SPECIMEN		Proper shipping name: UN NO: Preservative: Net Weight/Volume: 1 ml Net Value: 1 USD Risk Agent or Toxins: N/A Show transaction details	
Total for this shipment					\$33.60

38. Read the Requirements for Exempt Human or Animal Specimen Packages.
39. Click in the box next to the statement that you will follow the steps indicated in the checklist when preparing the package for this shipment.
40. Then click **Continue**.

NOTE: Many actions can be performed from the shipment summary window.

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41. Complete Shipment by printing all required documents.

Shipment Information					
Origin	Destination	Package Information	Workday Information	Scan Activity	Amount
Yale John Smith 25 Science Park 5th Floor New Haven CT 06511-1968 United States	Yale University John Smith Inge-Beisheim-Platz 1 Berlin BE 10785 Germany	FedEx 2/20/2019 FedEx International Economy CUSTOM 5 lbs PK	Company: CO01 Yale Designated: YD000002 Cost Center: CC0075 Program: PG00400 Project: PJ000001 Spend Category: SC204 Requester ID: 11784524	No information at this time.	\$33.60
Material Name		Material Classification			
Animal Chicken eggs		EXEMPT ANIMAL SPECIMEN		Proper shipping name: UN NO: Preservative: Net Weight/Volume: 1 ml Net Value: 1 USD Risk Agent or Toxins: N/A Show Transaction details	
Total for this shipment					\$33.60
<div style="display: flex; justify-content: space-around; align-items: center;"> <div style="border: 1px solid red; padding: 2px 10px; color: red;">Cancel Shipment</div> <div style="background-color: #0070c0; color: white; padding: 2px 10px;">Print Airwaybill</div> <div style="background-color: #0070c0; color: white; padding: 2px 10px;">Print Documents</div> <div style="background-color: #0070c0; color: white; padding: 2px 10px;">Print FedEx Bio</div> </div> <div style="display: flex; justify-content: space-around; align-items: center; margin-top: 5px;"> <div style="border: 1px solid #ccc; padding: 2px 10px;">Print all Required Labels</div> <div style="border: 1px solid #ccc; padding: 2px 10px;">Packaging Instructions</div> <div style="border: 1px solid #ccc; padding: 2px 10px;">Schedule Pickup</div> <div style="border: 1px solid #ccc; padding: 2px 10px;">Supporting Documents</div> </div> <div style="text-align: center; margin-top: 10px;"> <div style="border: 1px solid #ccc; padding: 2px 10px; display: inline-block;">Shipment History</div> </div>					

42. Click Print Airwaybill.

- Paper labels will print on locally installed printers, network printers, or multi-function devices.

Shipment Information					
Origin	Destination	Package Information	Workday Information	Scan Activity	Amount
Yale John Smith 25 Science Park 5th Floor New Haven CT 06511-1968 United States	Yale University John Smith Inge-Beisheim-Platz 1 Berlin BE 10785 Germany	FedEx 2/20/2019 FedEx International Economy CUSTOM 5 lbs PK	Company: CO01 Yale Designated: YD000002 Cost Center: CC0075 Program: PG00400 Project: PJ000001 Spend Category: SC204 Requester ID: 11784524	No information at this time.	\$33.60
Material Name		Material Classification			
Animal Chicken eggs		EXEMPT ANIMAL SPECIMEN		Proper shipping name: UN NO: Preservative: Net Weight/Volume: 1 ml Net Value: 1 USD Risk Agent or Toxins: N/A Show Transaction details	
Total for this shipment					\$33.60
<div style="display: flex; justify-content: space-around; align-items: center;"> <div style="border: 1px solid red; padding: 2px 10px; color: red;">Cancel Shipment</div> <div style="background-color: #0070c0; color: white; padding: 2px 10px; border: 2px solid red;">Print Airwaybill</div> <div style="background-color: #0070c0; color: white; padding: 2px 10px;">Print Documents</div> <div style="background-color: #0070c0; color: white; padding: 2px 10px;">Print FedEx Bio</div> </div> <div style="display: flex; justify-content: space-around; align-items: center; margin-top: 5px;"> <div style="border: 1px solid #ccc; padding: 2px 10px;">Print all Required Labels</div> <div style="border: 1px solid #ccc; padding: 2px 10px;">Packaging Instructions</div> <div style="border: 1px solid #ccc; padding: 2px 10px;">Schedule Pickup</div> <div style="border: 1px solid #ccc; padding: 2px 10px;">Supporting Documents</div> </div> <div style="text-align: center; margin-top: 10px;"> <div style="border: 1px solid #ccc; padding: 2px 10px; display: inline-block;">Shipment History</div> </div>					

NOTE: When the Shipping Label is printed, fold the paper in half and insert it into the plastic sleeve of your envelope. The Airway bill information should be facing through the window so that it can be easily scanned by the Carrier.

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43. Schedule Pickup

- Click on **Schedule Pickup**.

Please retain the Pickup Confirmation Number for your records. Your package will be picked up only if you have a Pickup Confirmation Number.

Shipment Information					
Origin	Destination	Package Information	Workday Information	Scan Activity	Amount
Yale John Smith 25 Science Park 5th Floor New Haven CT 06511-1968 United States	Yale University John Smith Inge-Beisheim-Platz 1 Berlin BE 10785 Germany	FedEx 2/20/2019 FedEx International Economy CUSTOM 5 lbs PK	Company: C001 Yale Designated: YD000002 Cost Center: CC0075 Program: PG00400 Project: PJ000001 Spend Category: SC204 Requester ID: 11784524	No information at this time.	\$33.60
Material Name Animal Chicken eggs		Material Classification EXEMPT ANIMAL SPECIMEN		Proper shipping name: UN NO: Preservative: Net Weight/Volume: 1 ml Net Value: 1 USD Risk Agent or Toxins: N/A Show Transaction details	
Total for this shipment					\$33.60

Buttons: Cancel Shipment, Print Airwaybill, Print Documents, Print FedEx Bio, Print all Required Labels, Packaging Instructions, **Schedule Pickup**, Supporting Documents, Shipment History

44. Select the Printer where you would like to print the shipping label. Then click Print.

The screenshot shows a 'Print' dialog box with the following elements:

- General** tab selected.
- Select Printer** section: A list of printers is shown, with 'ITS_E56_Rm-648A' selected. The list includes 'Add Printer', 'Adobe PDF', 'Fax', 'HP Universal Printing P5', 'ITS_4thB', and 'ITS_E56_Rm-648A'.
- Status:** Ready
- Location:** (empty)
- Comment:** (empty)
- Page Range** section: 'All' is selected. 'Pages:' field contains '1'.
- Number of copies:** 1
- Collate** checkbox is unchecked.
- Buttons:** 'Print' (highlighted with a red box), 'Cancel', and 'Apply'.

45. Close out the Print Label Screen to return to the My Shipments window.

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46. Click Print Documents to print necessary Customs documents.

Shipment Information					
Origin	Destination	Package Information	Workday Information	Scan Activity	Amount
Yale John Smith 25 Science Park 5th Floor New Haven CT 06511-1968 United States	Yale University John Smith Inge-Beisheim-Platz 1 Berlin BE 10785 Germany	FedEx 2/20/2019 FedEx International Economy CUSTOM 5 lbs PK	Company: CO01 Yale Designated: YD000002 Cost Center: CC0075 Program: PG00400 Project: PJ000001 Spend Category: SC204 Requester ID: 11784524	No information at this time.	\$33.60
Material Name Animal Chicken eggs		Material Classification EXEMPT ANIMAL SPECIMEN		Proper shipping name: UN NO: Preservative: Net Weight/Volume: 1 ml Net Value: 1 USD Risk Agent or Toxins: N/A Show Transaction details	
Total for this shipment					\$33.60
<div style="display: flex; justify-content: space-around; align-items: center;"> Cancel Shipment Print Airwaybill Print Documents Print FedEx Bio </div> <div style="display: flex; justify-content: space-around; align-items: center; margin-top: 5px;"> Print all Required Labels Packaging Instructions Schedule Pickup Supporting Documents </div> <div style="text-align: center; margin-top: 10px;"> Shipment History </div>					

47. Click Print Documents.

- Select the printer, then click **Print**.
- Close out the Print Documents to return to the My Shipments window.

PAGE 1 OF 1				Print Documents
COMMERCIAL INVOICE				
Date Shipped:	2/20/2019	Air Waybill No:	785600819830	
Shipper Tax ID/EIN:				

IMPORTANT: Print 3 copies of the Commercial Invoice and other customs related forms for international air shipments and 5 copies for international FedEx Ground shipments to Canada or Mexico. Include the copies with the Shipping Label.

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48. Print the packaging instructions and labels that appear. Checklists and labels were created based on your earlier responses to categorize the material you are shipping.

Shipment Information					
Origin	Destination	Package Information	Workday Information	Scan Activity	Amount
Yale John Smith 25 Science Park 5th Floor New Haven CT 06511-1968 United States	Yale University John Smith Inge-Beisheim-Platz 1 Berlin BE 10785 Germany	FedEx 2/20/2019 FedEx International Economy CUSTOM 5 lbs PK	Company: CO01 Yale Designated: YD000002 Cost Center: CC0075 Program: PG00400 Project: PJ000001 Spend Category: SC204 Requester ID: 11784524	No information at this time.	\$33.60
Material Name	Material Classification		Proper shipping name:		
Animal Chicken eggs	EXEMPT ANIMAL SPECIMEN		UN NO: Preservative: Net Weight/Volume: 1 ml Net Value: 1 USD Risk Agent or Toxins: N/A Show Transaction details		
Total for this shipment					\$33.60
<div style="display: flex; justify-content: space-around;"><div>Cancel Shipment</div><div>Print Airwaybill</div><div>Print Documents</div><div>Print FedEx Bio</div><div>Print all Required Labels</div><div>Packaging Instructions</div><div>Schedule Pickup</div><div>Supporting Documents</div><div>Shipment History</div></div>					

49. Cut around the outside border of the label and affix it to a vertical side of the box (not the top or bottom) then cover the label with clear plastic packaging tape.

50. Cut around the outside border of the label, fill in the information in the Dry Ice label, affix it to a vertical side of the box (not the top or bottom) and then cover the label with clear plastic packaging tape.

NOTE: Missing information on this label can result in a returned shipment.

51. Click Schedule Pickup.

Shipment Information					
Origin	Destination	Package Information	Workday Information	Scan Activity	Amount
Yale John Smith 25 Science Park 5th Floor New Haven CT 06511-1968 United States	Yale University John Smith Inge-Beisheim-Platz 1 Berlin BE 10785 Germany	FedEx 2/20/2019 FedEx International Economy CUSTOM 5 lbs PK	Company: CO01 Yale Designated: YD000002 Cost Center: CC0075 Program: PG00400 Project: PJ000001 Spend Category: SC204 Requester ID: 11784524	No information at this time.	\$33.60
Material Name	Material Classification		Proper shipping name:		
Animal Chicken eggs	EXEMPT ANIMAL SPECIMEN		UN NO: Preservative: Net Weight/Volume: 1 ml Net Value: 1 USD Risk Agent or Toxins: N/A Show Transaction details		
Total for this shipment					\$33.60
<div style="display: flex; justify-content: space-around;"><div>Cancel Shipment</div><div>Print Airwaybill</div><div>Print Documents</div><div>Print FedEx Bio</div><div>Print all Required Labels</div><div>Packaging Instructions</div><div>Schedule Pickup</div><div>Supporting Documents</div><div>Shipment History</div></div>					

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52. Choose a pickup date (if other than today) and then select the Shipment Ready Time and Business Close time from the drop-down list of options provided.

- Please allow at least 2 hours between the shipment ready time and business close time.

Scheduling Information	
Choose Pickup date, Shipment ready time and Business close time	
Current time: 10:40:03 PM	
¹ Pickup date:	2/18/2019 ▼
Time Zone:	Eastern ▼
² Shipment ready time:	---Select--- ▼
Business close time:	---Select--- ▼

53. Edit the address information if necessary. Please include building, floor, or suite numbers where the package is located.

Pickup Location	
Edit Address information for Package(s) to be picked up	
*Contact Name:	John Smith
*Company:	Yale
*Address:	25 Science Park 5th Floor
*City:	New Haven
*State:	CT
*Zip:	06511-1968
Country:	US
*Phone:	123-456-7890
Special Instructions:	Dangerous Goods

IMPORTANT: Please make sure **Address** field has the complete physical address where the package needs to be picked up from (including building, floor or suite numbers).

54. Edit the Number of Packages to be picked up from the specified location.

Shipment Information	
Edit Number of Packages to be picked up from this location	
Service Type: FedEx Standard Overnight	
*Number of Packages:	1
*Total Weight:	5 lbs

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55. Click on **Submit Pickup**.

Please retain the Pickup Confirmation Number for your records. Your package will be picked up only if you have a Pickup Confirmation Number.

Shipment Information

Edit Number of Packages to be picked up from this location

Service Type: FedEx Standard Overnight

***Number of Packages:**

***Total Weight:** lbs

[Back to Summary](#) [Submit Pickup](#)

56. Click Back to Summary.

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FREQUENTLY ASKED QUESTIONS: INTERNATIONAL SHIPMENTS

- How do I send a “Documents Only” shipment?
 - A document is generally defined as a written, typed or printed communication of no commercial value. International documents shipped in an envelope or in any other packaging do not require an invoice. Call us at 1-800-816-1615 for information about documents. Enter customs value of at least \$1.00 for documents only.
- How do I send a Non-Documents shipment?
 - International shipments containing items other than documents require additional forms. When using non-document shipments, you need to fill in product profile and other information for export purpose. Multiple copies of commercial invoices and other forms are needed. The system will produce a label and other necessary documents for each package.
- What documents are required for international shipments?
 - If you're shipping internationally, eShipGlobal produces the following documents based on the information you provide:
 - Commercial Invoice
 - Shipper's Export Declaration (SED)
 - Certificate of Origin
 - NAFTA Certificate of Origin
 - Caribbean Common Market Commercial Invoice (CARICOM)
- What is a Commercial Invoice?
 - This is a document provided by the seller/exporter that describes the parties involved in the shipping transaction and the goods being transported. It is the primary document used by Customs and for imports should be prepared using the official language of the country to which the goods are being exported, if possible. The Commercial Invoice should include a detailed breakdown of all items included in the shipment: including any generic or scientific name, grade and quantity, composition and/or construction, the country of manufacture, the price or cost, currency used, the Harmonized System number for each commodity and the terms of delivery. The document shown is an example of one format. Some countries require that an original invoice be executed on the shipper's letterhead. The invoice should always be signed and dated by the exporter certifying that the details provided are true and correct representations of the contents covered by the Commercial Invoice.
- How many copies should I send with the shipment?
 - The system will provide a prompt indicating the quantity of commercial invoice copies and other forms needed for the shipment that are required.
 - Forms cannot be filed electronically.
- What is NAFTA Certificate of Origin?
 - The CF434 NAFTA Certificate of Origin is a US form that is used to validate claims for preferential duty treatment (reduced or duty-free entry) under the North American Free Trade Agreement (NAFTA) between the US, Canada and Mexico. Alternative versions of the form which have been approved by Canada or Mexico customs authorities may also be used. This form can be prepared to cover either a single shipment or for a 'blanket' period up to one (1) year. It may be prepared in Spanish, French or English. However, customs authorities may require that a written translation into the importer's

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language be provided. To request preferential treatment, the NAFTA Certificate must be prepared and signed by the exporter. However, the exporter may ask the actual producer of the goods to prepare and sign one (as the manufacturer) as a supporting document. For more information, please contact US Customs.

- What is Caribbean Common Market Commercial Invoice?
 - The CARICOM is an invoice much like the Commercial Invoice, that is used for export shipments consigned to the Caribbean Common Market member nations. The CARICOM can be used interchangeably with the Commercial Invoice provided the details required by the import customs requirements of the destination are met on the document that is prepared. It is recommended that the shipper verify with the importer what form of invoice is acceptable or required if there is any question. The CARICOM should not be used for exports other than to the CARICOM member nations. (Antigua, Barbuda, Bahamas, Barbados, Belize, Dominica, Grenada, Guyana, Haiti, Jamaica, Montserrat, St. Kitts and Nevis, St. Lucia, St. Vincent and Grenadines, Suriname and Trinidad and Tobago).
- What is a Shippers Export Declaration (SED)?
 - The Shipper's Export Declaration (SED) is required by the US Department of Census in order to obtain statistical data and by the Bureau of Export Administration (BXA) to assist in enforcing export controls. Many shipments qualify for an exemption on the basis of the destination and/or the value. (Shipments to most destination are exempt if the value per Schedule B is \$2500 USD or less.) The form is to be prepared and signed by a US shipper (exporter) or their agent, indicating the description (including the Schedule B or HTS number), value, weight, destination, and other basic information about an export shipment. SED information may be submitted electronically through the Automated Export System (AES). For information on SED requirements and exemptions, please review the U.S. Code of Federal Regulations.

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