iShipdocs User Guide

11/8/2016

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Contents

About This Guide....10
Purpose of this Guide....10
Who should read this Guide....10
How this Guide is organized....10
Typographical Conventions....11
How to Get in Touch....12
Documentation Support....12
Technical Support....12
For additional information....12
Chapter 1: Introduction – ishipdocs....13
Product Overview....14
Features....14
Chapter 2: Getting Started....15
Accessing iShipdocs Application....16
New User Registration....16
Personal User....17
Business User....19
Logging into ishipdocs....21
Forgetting your password....22
Understanding ishipdocs user interface....23
Chapter 3: Computer Setup....24
Settings....25
OS & Browser Compatibility....26
Chapter 4: Upgrading Account....27
Upgrading account package as Business User....28
Chapter 5: Functionality as a Personal User....30
How to send files....31
Send files to print shop....31
How to select files from storage for sending files to print shop....31
Uploading Files for sending to Print Shop....32
Including delivery details....34
Send files to others....34
Uploading Files for sending to others....34
'Cancel' button....35
Reasons to use Cancel button....35
How to View Inbox....36

How to View Sent Items 41
How to track files 46
How to add files in Storage 54
Cloud Workspace 54
Adding Workspace 54
Removing Work space 57
Setting Alerts 57
Folders 59
Adding Folders 59
Editing Folder 60
Deleting Folder 61
Setting Alert 62
Refreshing the Page 63
Files 63
Adding Files 63
Copying Files 65
Moving Files 66
Viewing History 67
Deleting Files 67
Linking Files 68
Setting Alert 69
Exporting the List of Files 70
Downloading File 71
How to Manage Contacts 72
List view 72
Searching Contacts 72
Adding New Contact 73
Editing Contacts 74
Removing Contacts 74
Importing/Exporting Contacts 75
Card View 77
Searching Contacts 78
Downloading VCard 78
Chapter 6: Functionality of ishipdocs application as a Business user 80
Creating new seats 81
How to send files 82
Send files to print shop 82

How to select files from storage for sending files to print shop 82
Uploading Files for sending to Print Shop 83
Including delivery details 85
Send files to others 85
Uploading Files for sending to others 85
'Cancel' button 86
Reasons to use Cancel button 86
How to View Inbox 88
How to View Sent Items 92
How to track files 98
How to share files 106
Workspace 106
Adding Workspace 106
Removing Work space 110
Setting Alerts 111
Folders 113
Adding Folders 113
Editing Folder 114
Deleting Folder 116
Setting Alert 116
Sharing Folder 118
Viewing shared list 122
Refreshing the Page 124
Files 124
Adding Files 124
Copying Files 129
Moving Files 129
Viewing History 130
Deleting Files 130
Linking Files 130
Setting Alert 131
Exporting the List of Files 133
Refreshing the Page 134
Downloading File 134
Share Workspace document 134
Adding Comment 136
How to Send DropFiles Invitation 138

DropFiles Info 138
Invitee List 140
How to Manage Contacts 147
List view 147
Searching Contacts 147
Adding New Contact 148
Editing Contacts 149
Removing Contacts 149
Importing/Exporting Contacts 149
Card View 152
Searching Contacts 152
Downloading VCard 153

About This Guide

Purpose of this Guide

This user guide is designed to provide user-friendly, detailed instructions for performing all tasks associated with **ishipdocs** application.

Who should read this Guide

This guide is intended for the users who will work on **ishipdocs** application.

How this Guide is organized

This guide is divided into the following chapters:

- **Chapter 1 – Introduction** explains the overview and objectives of ishipdocs application.
- **Chapter 2 – Getting Started** explains how to send files if you are not a registered user, the process of new user registration, login to ishipdocs, the process of retrieving your password if you forget it, and understanding ishipdocs' user interface.
- **Chapter 3 – Computer Setup** explains the process to setup browser compatibility and the Settings section.
- **Chapter 4 – Upgrading Account** explains the process to upgrade your account as single user, business user, and enterprise user.
- **Chapter 6 – Functionality as a Personal User** explains the functionalities ishipdocs users will enjoy as a personal user.
- **Chapter 7 – Functionality as a Business User** explains the functionalities ishipdocs users will enjoy as a business user.

Typographical Conventions

Before you start, it is important to understand the typographical conventions used in this guide.

This	Represents
Bold	Menu, any option on the menu, radio button, check box, command button or a link.
	A note, providing additional information about a certain topic.
	An important message not to be ignored.

How to Get in Touch

The following section provides information on how to obtain support for documentation and software.

Documentation Support

For any questions, comments or suggestions on the documentation, contact us by email at support@ishipdocs.com

Technical Support

If you have any problems, questions or suggestions regarding this software, email us at support@ishipdocs.com. While contacting technical support, please have the following information ready:

- ReferenceID (Which is Generated at the time of installation)

For additional information

Please contact: ARC via email, and / or phone:

Email: support@ishipdocs.com

Phone: 1-855 Go iShip

Chapter 1: Introduction – ishipdocs

In this chapter, you will learn about:

- Product Overview
- Features

Product Overview

Cloud Store, Share, Send, Print Anywhere!!!

The above tag line says everything about ishipdocs. You need your documents somewhere else but don't have the time to ship them? Here comes the utility for ishipdocs, which enables the global distribution easy, fast, and green.

Cloud Printing is now ubiquitous and accepted as an integral part of most companies' document management infrastructure. For the last two years ARC with the cloud application ishipdocs, has been providing customers with Cloud Printing Services (CPS). ishipdocs users range from Global Enterprise to Single Users. All users have the desire to get large business documents anywhere, anytime, in the shortest amount of time.

The benefits of Cloud Printing Services are clear. Print hardware and software costs are reduced. The cost of print with CPS is based on measured usage, in a just in time model. And distribution costs are drastically reduced with digital delivery combined with local print, avoiding the "print here, overnight there" model that has built the overnight industry delivery.

ARC's CPS offers unique ability to securely share and distribute large files over the ishipdocs network of print service providers. This capability gives users powerful Managed File Transfer capabilities as well.

Managed File Transfer, or MFT, is the term given to the technology that's replacing FTP. More secure than FTP and easily accessed via the Internet, MFT is another document management technology, like CPS, that organizations see as a valuable and necessary element of their communication infrastructure. MFT gives organizations visibility into file transfers and helps them manage, monitor and govern file transfers proactively. ARC's ishipdocs is showcased as a powerful offering for companies looking for aligning MFT and CPS strategies.

Features

- Provides faster and secure mode to distribute large files
- Transmits files up to 3 GB including large Architectural, Engineering, Marketing
- Advertising and Planning documents
- No printing limitations
- Reduce your document shipping costs
- Reduces the chances of losing document
- Have document management experts ensure your digital transmission and delivery
- Track your documents and get proof of the delivery
- Eliminates custom headaches at global locations
- Digitally ship domestically, too!
- Promotes green objectives

- Send files up to 3 GB
    - Track the file activity
- Manage users and set access permissions by a company, department or project team
- Turn any folder of content into a shared workspace and invite others to view, edit or add their own files
- Use your public folder for others to directly place their files into your workspace
- Store and back up your documents in the cloud
- Users can view previous versions of files even after changes are made and new versions are uploaded.
    - Can add comments to specific folder/files or exchange feedback with team members using discussion threads and notification via email

Chapter 2: Getting Started

In this chapter you will learn about:

- How to send print enquiry to Global Distribution Center
- New user registration
- Logging to ishipdocs
- Forgetting your password
- Understanding ishipdocs' user interface

Accessing iShipdocs Application

Enter the following URL on your browser address bar: www.ishipdocs.com

If you are a new user click on ***Sign Up*** to register.

Again, if you are an existing user click on ***Sign In*** button to log on to the application.

New User Registration

If you are a new user and do not have ishipdocs account you need to register first to access ishipdocs application. Follow the given procedure to register.

After the page for ishipdocs is displayed, click **Sign up**. The Plans and Pricing page appears with the two new sign up models as ***Personal User*** and ***Business User***.

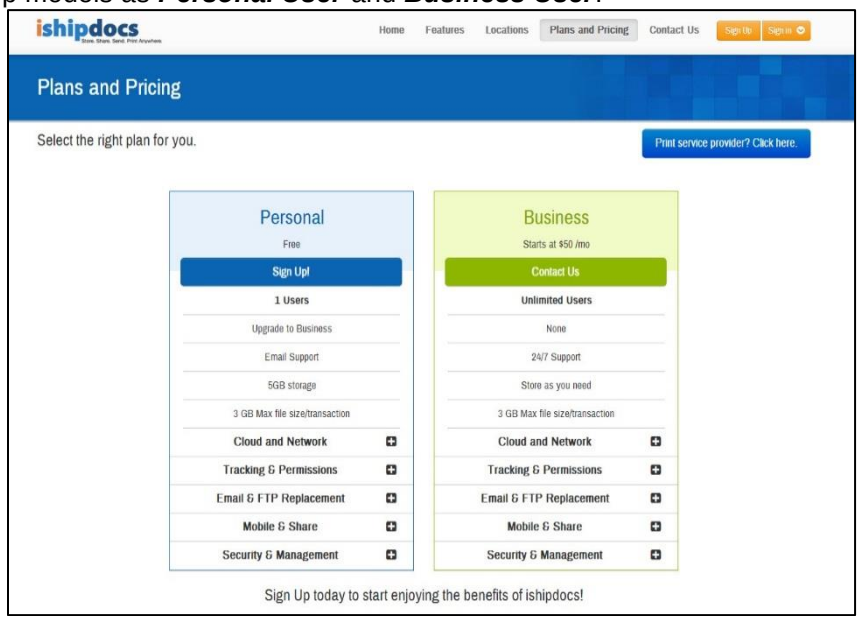


Figure 6: Plans & Pricing screen

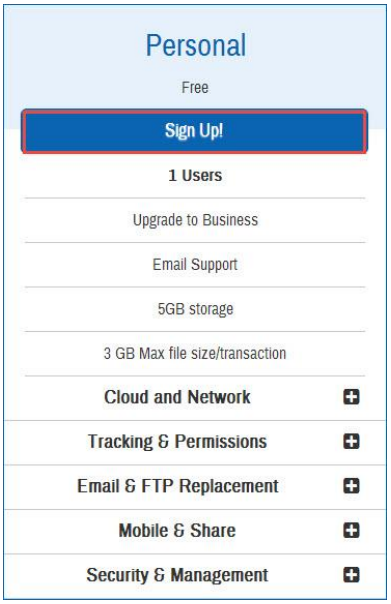
1. Here, you can find two sign up models as Personal and Business.
2. Personal user is an independent user and is free.
3. Business user cannot be independent users, with a basic fee of $50 per month.

In this section, we will see how to register both as a Personal User and as a Business user.

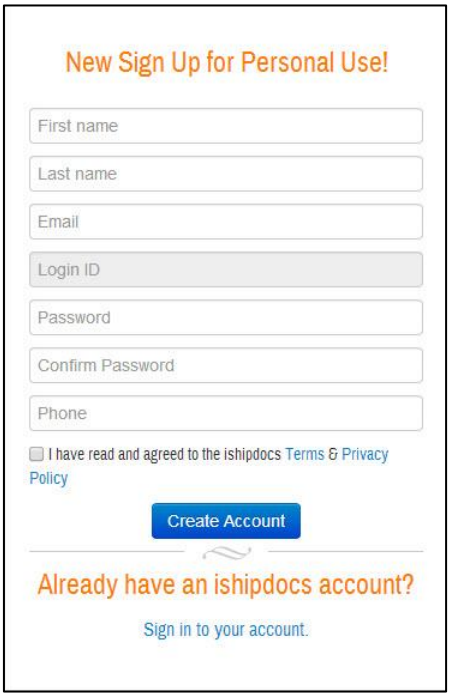
Personal User

In order to register as a **Personal User** follow the steps given below:

1. Click ***Sign up*** under the Personal user column as shown in the image below:

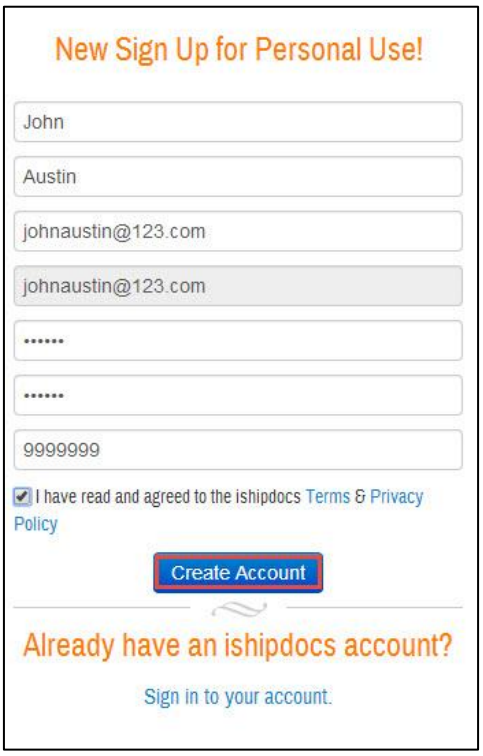


2. A new screen will appear to enter details as shown in the image below:

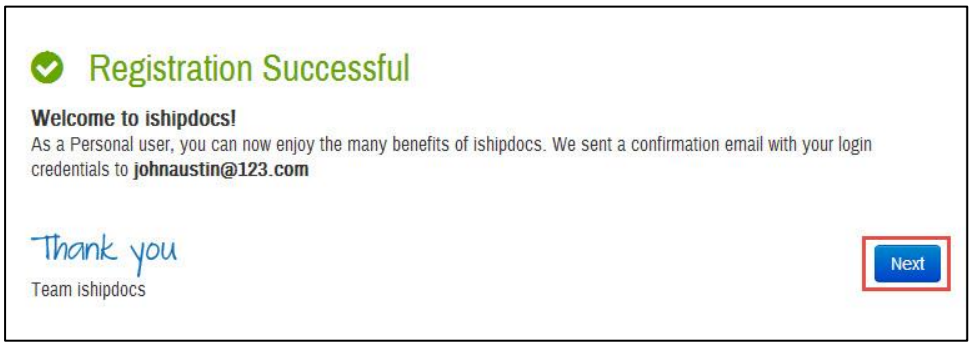


- Enter your First Name, Last Name, Email, Password, Confirm Password and Phone Number in the respective text boxes. Your email will be taken as your Login ID automatically.
- Select the "**I have read and agreed to the ishipdocs Terms and Privacy Policy"** check box.

3. Click **Create Account** after you have finished entering your details, as shown in the image below:



4. A new screen will appear with the Registration successful message. A confirmation email with all the login credentials will be sent to the email that you have provided. Click **Next**.



5. Enter the general information as well as contact information. You can reset your password if required. You can also opt to fill up the details later and start using ishipdocs. Click **Next**.

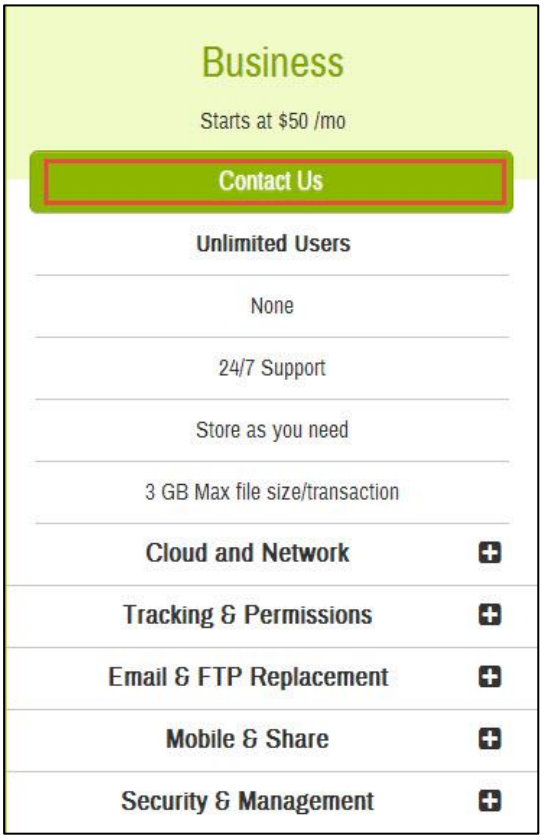
6. The **Settings** screen appears. Click **Finish**.

Business User

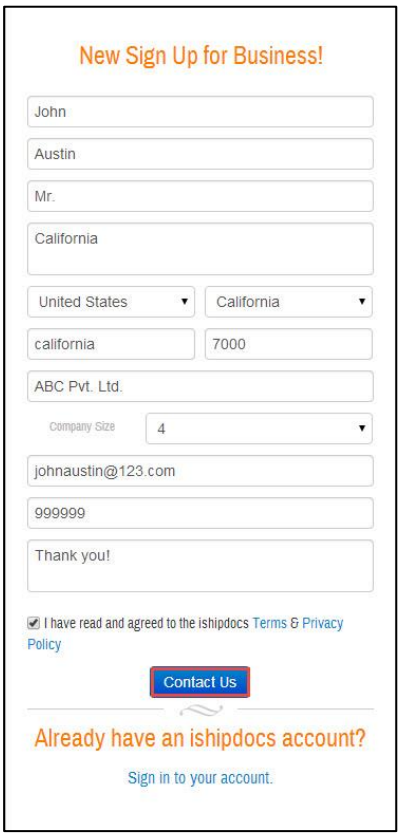
Now that we have seen how to sign up as a Personal User let's see how to sign up as a business user:

To sign up as a Business user you need to Contact Us. A business user cannot sign up directly. Let's see the steps as given below:

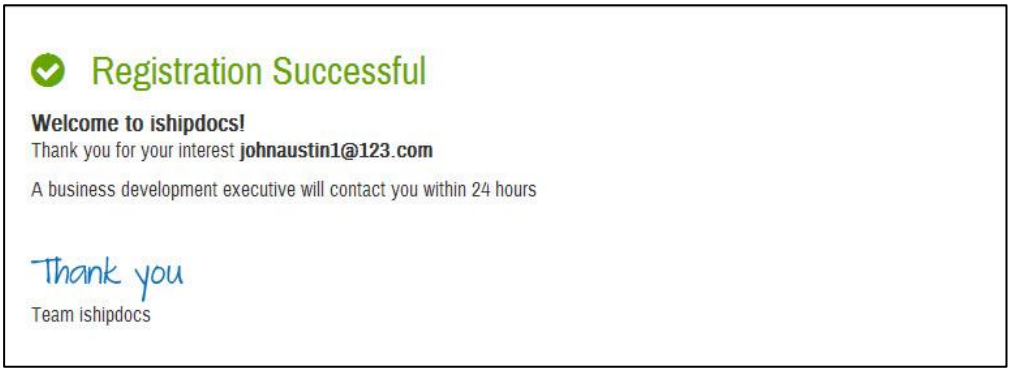
1. Click Contact Us in the Business Column as shown in the image below:



2. The new Sign up for business screen appears.
   - Enter the details in the respective text boxes. Select the "**I have read and agreed to the ishipdocs Terms and Privacy Policy"** check box.
   - Click **Contact Us**.



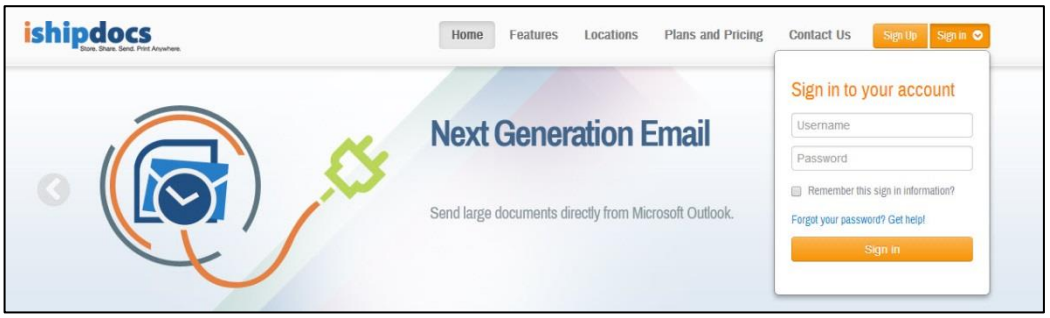
3. The Registration Successful message will appear. Once your account is approved a notification mail will be sent to your registered email.



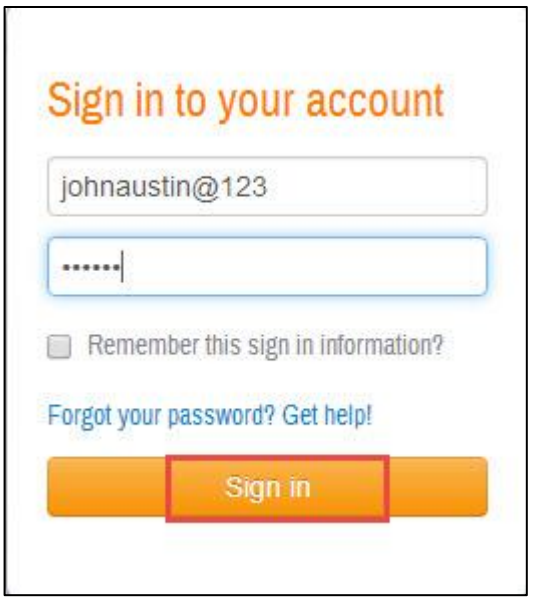
Logging into ishipdocs

Follow the given procedure to log on to the ishipdocs application.

1. After the page for ishipdocs is displayed, click **sign in**. A pop screen will appear as shown in the image below:



2. Enter valid user name and password in the **username** and **password** text boxes respectively.
3. Click ***Sign in***. The **Send Files** screen appears and you are logged in.

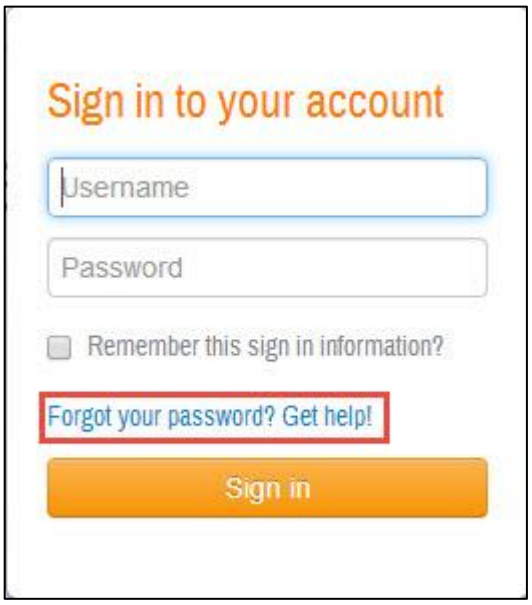


4. Select the "**Remember this sign in information?"** for the application to remember the credentials.

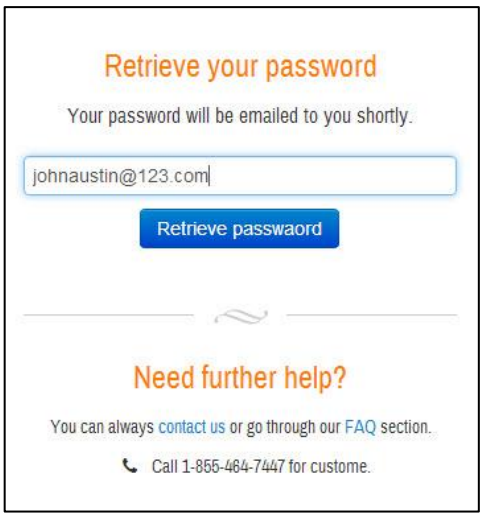
Forgetting your password

If you forgot your password, follow the given procedure to retrieve it.

1. Under the sign in pop up box click **"Forgot your password? Get Help!"**



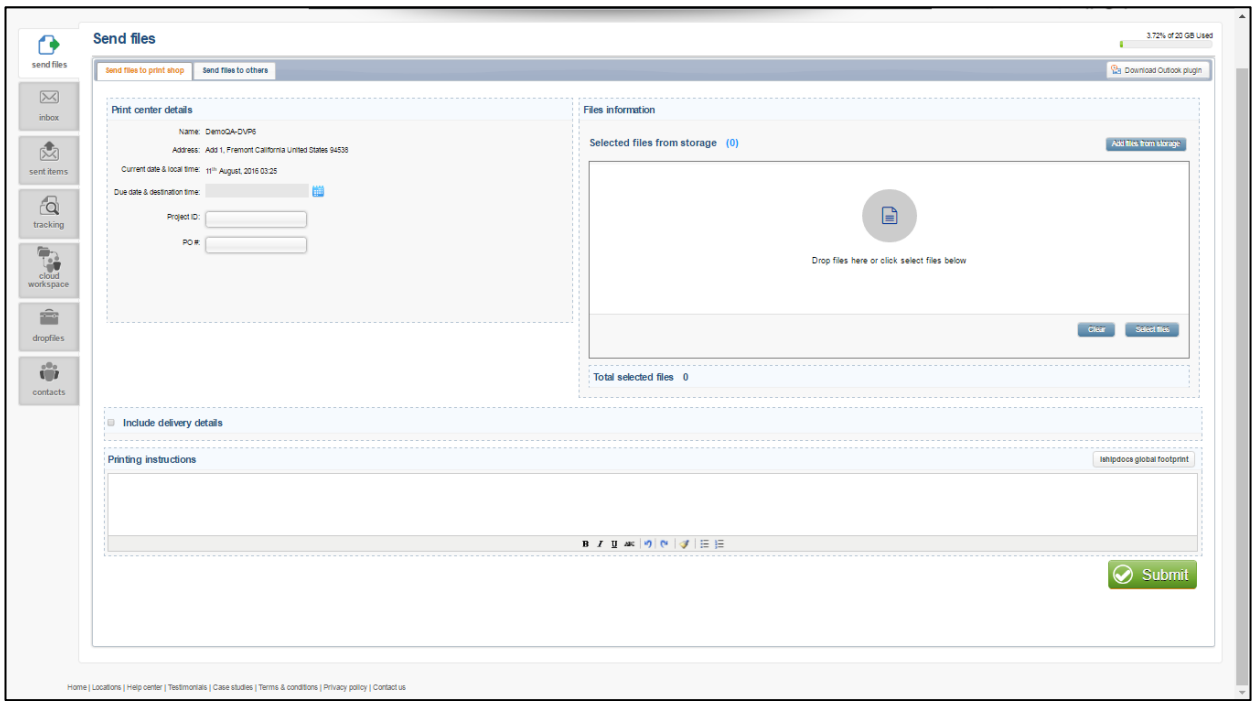
2. A new screen appears. Enter the username in the text box. Click **Retrieve Password**.



3. A confirmation message appears stating that the password has been sent to the user's e-mail id which was provided by the user.
4. Open your e-mail account, you will receive your password in the e-mail instantly.

Understanding ishipdocs user interface

To navigate successfully in ishipdocs, a proper understanding of the interface is essential. The following section illustrates the various parts of the ishipdocs interface and its uses.



ishipdocs' user interface

The main menu section consists of the following menus:

- **Send files:** You can send files through e-mail to specific recipients.
- **Inbox:** You can view the details of the mails received from the Inbox menu.
- **Sent items:** You can view the details of the sent items from the sent items menu.
- **Tracking:** You can track files at the same time you can track print documents through this module.
- **Share:** From this module you can able to store files in different folder. You can create your own folder or you can keep the files in the existing folders as per your requirement. You can share the folders to different ids as per your requirement.
- **DropFiles:** From this module you can give permission to the selected users to view the DropFiles in the store files.
- **Contacts:** From this module you can able to manage the address book. You may search, add contacts add groups as well as export/ import the list if required

Chapter 3: Computer Setup

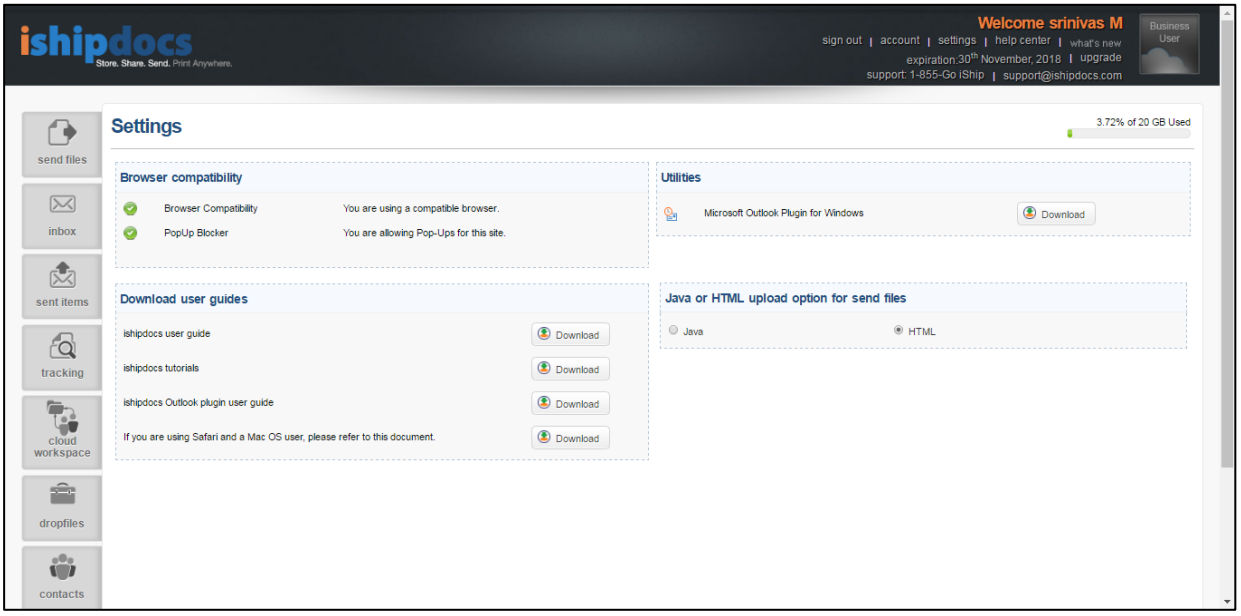
In this chapter, you will learn about:

- Settings section
- OS & Browser compatibility

Settings

Configure the Settings section to setup browser compatibility, select uploading tool. Also, you can download tutorials and plug-ins from Settings.

1. Click **settings** from the menu bar. The **Settings** screen appears.



2. Check the browser compatibility from the **Browser Compatibility** section. Green tick will be displayed if your browser is compatible with the application and pop-up blocker for the application is disabled in your browser.

3. Check the utilities from the **Utilities** section.

   - If the **Microsoft Outlook Plugin** is not installed click the **Download** button to install the Microsoft Outlook Plugin.

4. Select either **Java** or **HTML** upload option to enable Java or HTML upload of documents in the application, respectively.

OS & Browser Compatibility

Operating System	Browser
Windows 2003 (32 bit & 64 bit)	IE 7, IE 8, Firefox 3.6 and above, Chrome 6.0 and above, Safari 5.0 and above
Window XP (SP2 & SP3)	IE 7, IE 8, Firefox 3.6 and above, Chrome 6.0 and above, Safari 5.0 and above
Window XP (SP2 & SP3)	IE 7, IE 8, Firefox 3.6 and above, Chrome 6.0 and above, Safari 5.0 and above
Windows VISTA (32 bit & 64 bit)	IE 7, IE 8, Firefox 3.6 and above, Chrome 6.0 and above, Safari 5.0 and above
Windows 7 (32 bit & 64 bit)	IE 7, IE 8, Firefox 3.6 and above, Chrome 6.0 and above, Safari 5.0 and above
MAC (Snow Leopard)	Safari, Chrome, and Firefox

Chapter 4: Upgrading Account

In this chapter you will learn about:

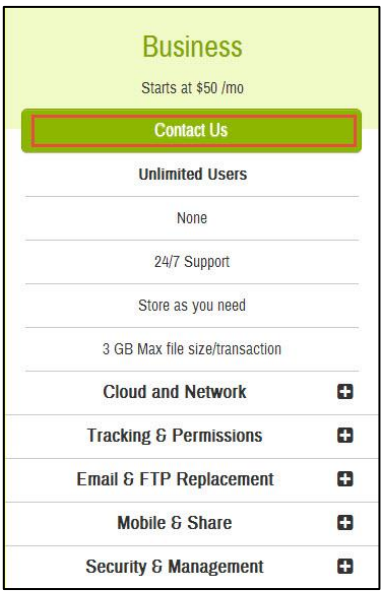
- Upgrading account package as Business User from a Personal user or existing single, lite or premium business user

Upgrading account package as Business User

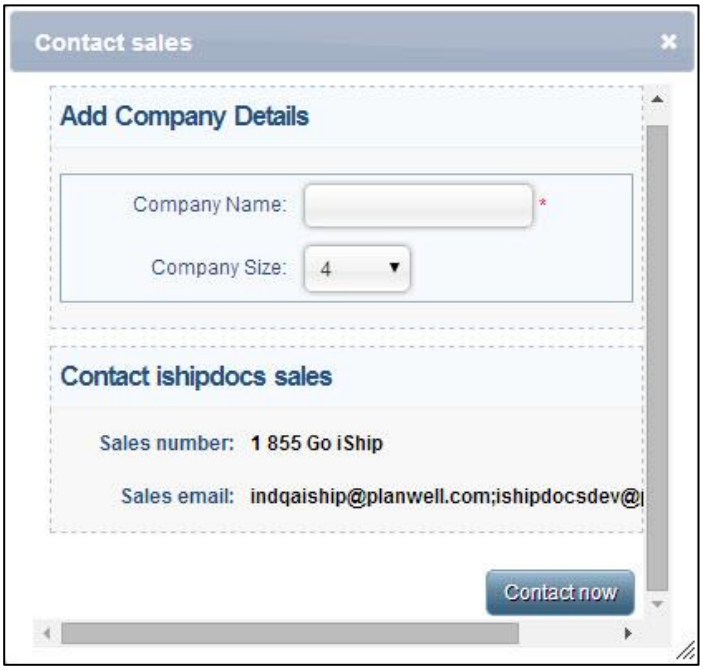
A new Personal user or existing single, lite, business or enterprise users can opt to upgrade their account to a business user. To do so, follow the steps given below:

1. Click **Upgrade** from the menu bar as shown in the image below:

2. The upgrade to business account screen appears. Click **Contact Us**.

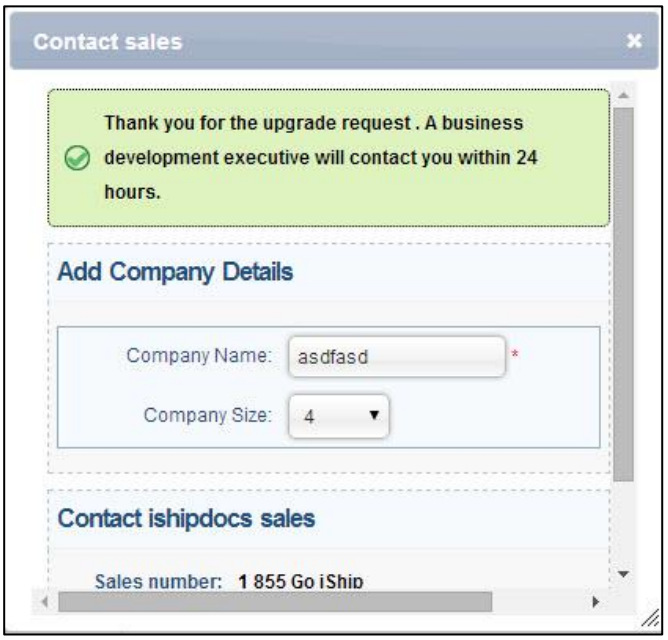


3. A new pop-up window appears. Enter the Company name and Company size in the respective text boxes. Click **Contact Now**.



Note: In case of an existing personal or business user the ***Company Name*** text box will not be present.

4. A message will appear and once approved a notification will be sent to your registered email. The message will look as under:



Chapter 5: Functionality as a Personal User

For Personal User the maximum file size per transaction is 3 GB, the storage capacity is 5 GB. You cannot share the file if you are a personal user. The DropFiles facility is not allowed if you are a personal user.

In this chapter you will learn about:

- How to send files
- How to view inbox
- How to view sent items
- How to track files
- How to share files
- How to manage contacts

How to send files

You can send files via ishipdocs to specific recipients. The file size for the free user is 3 GB. The first transaction will be free of cost from second transaction onwards you will be charged $ 5.

- Click

(**send files** icon) from the left hand panel. The **Send Files** screen appears with two tabs: **Send files to print shop** & **Send files to others**

Send files to print shop

You can send files in bulk either from storage or directly uploaded files from your local system to the print shop.

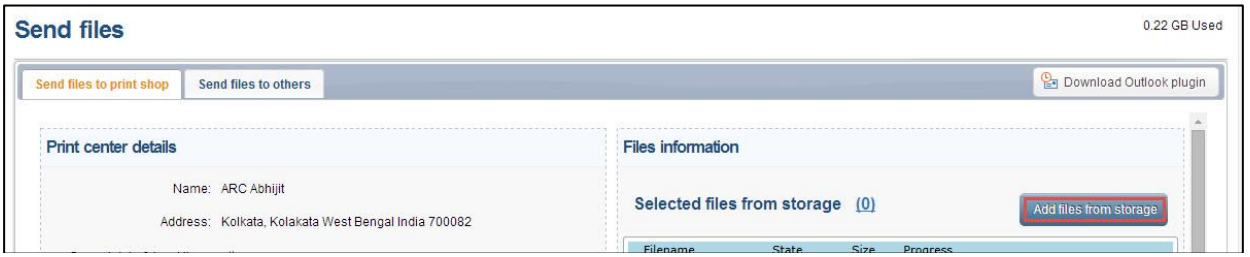
In the Print order details section enter the **Project ID** and the **Purchase order number (PO#)** on the respective fields. Rest of the fields are automatically populated by the application.

How to select files from storage for sending files to print shop

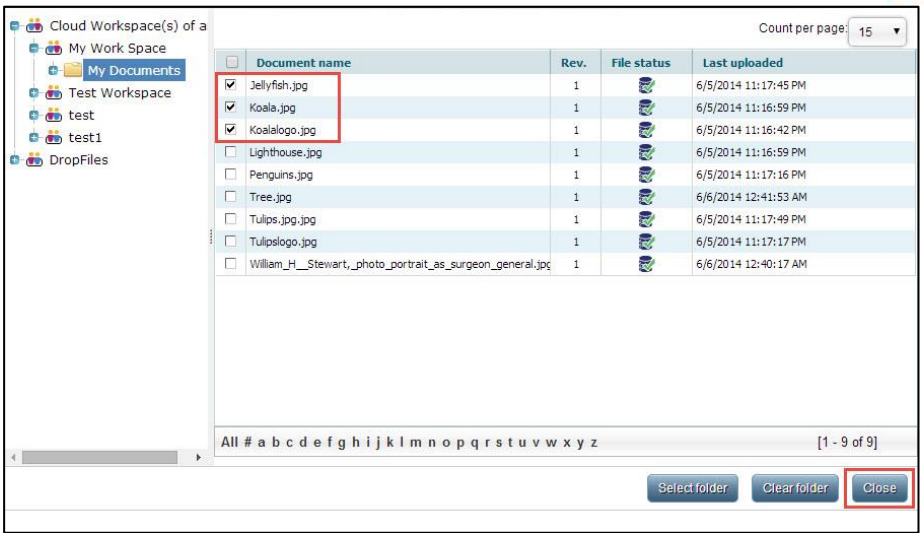
You can also add files from the cloud storage to send files to the print shop. To do so, follow the steps given below:

Note: This feature is only available for users associated with the Print Service Providers.

1. Click **Add files from storage** as shown in the image below:



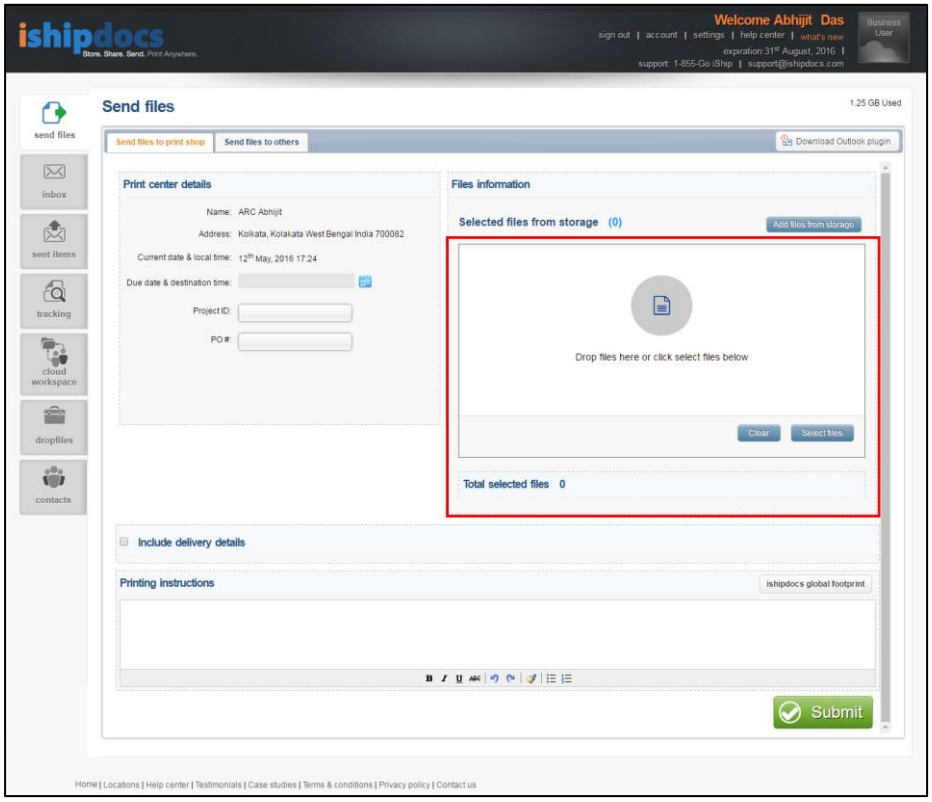
2. Select the files that you want to add and click **Close.**



3. The select files from storage will display the number of files that you have selected. You can then send these files to the print shop to print.

Uploading Files for sending to Print Shop

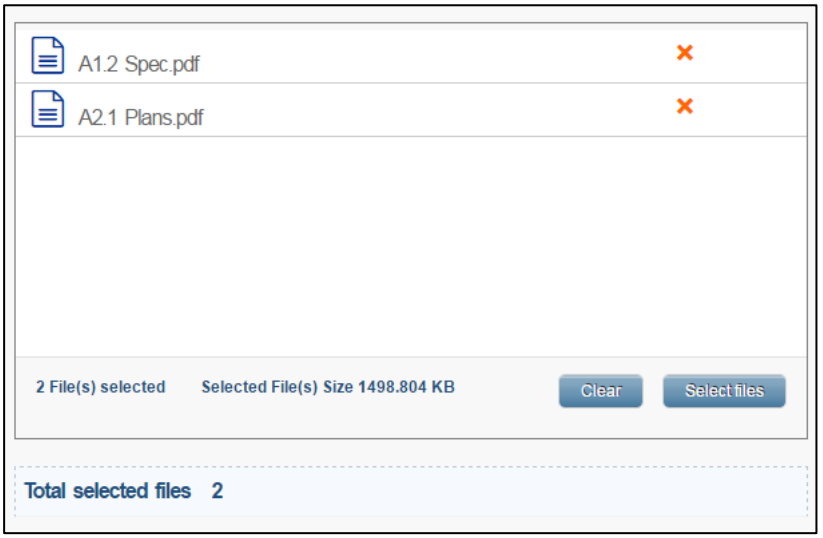
Under the **Send files to print shop** tab on the **Send files** screen, there is the **HTML 5 Upload Tool**. This is shown in the screenshot below,



Steps to select files for upload using HTML 5 Upload Tool:

- Click on **[Select Files]** button to open the *Document Selection window* to select files/images from the local computer
- Select the files/images and then click on **[Open]** button on the *Document Selection window* to attach the files in the upload tool

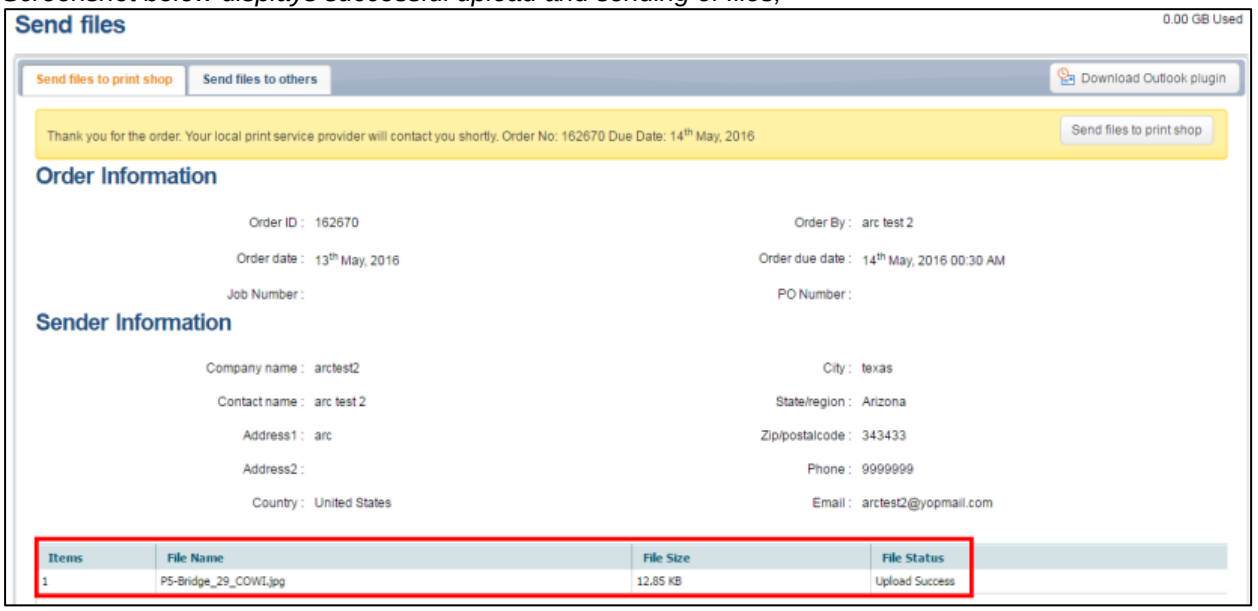
  Alternatively
  - Open any folder on the local computer, drag and then drop the selected files/images in the space provided in the upload tool on the application page
- The selected files/images will be displayed on the Upload Tool interface. The count of the selected files will also be displayed on the Upload tool interface. This is shown the screenshot below,



- Click on **[Clear]** button to remove the selected files/images

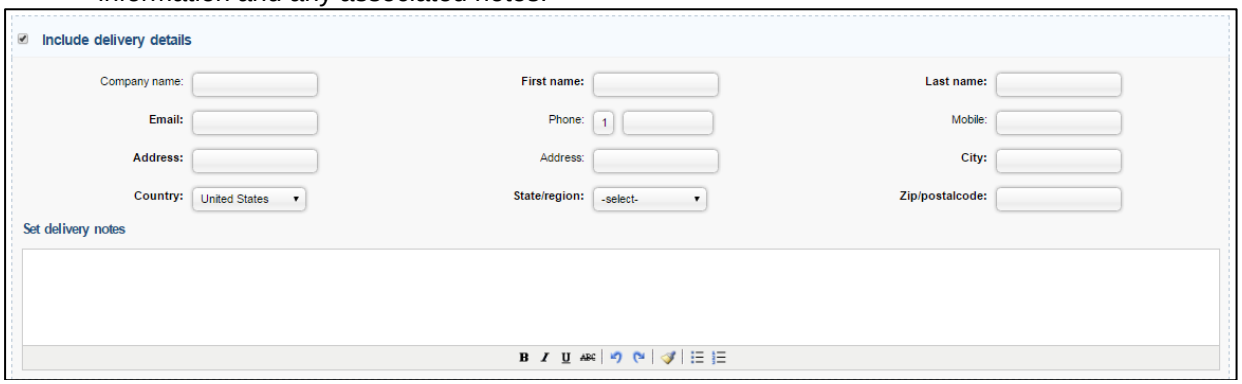
After entering the relevant information user needs to click on **[Submit]** button to upload the files and then send the files along with the print order to the print shop.

Screenshot below displays successful upload and sending of files,



Including delivery details

- Tick the checkbox **Include delivery details** to view and enter information delivery company information and any associated notes.



- In the end enter **Printing Instructions** and click **Submit** to send the documents to a print shop to be printed according to the given printing instructions

Note: Click **ishipdocs global footprints** to view ishipdocs global printing locations.

Send files to others

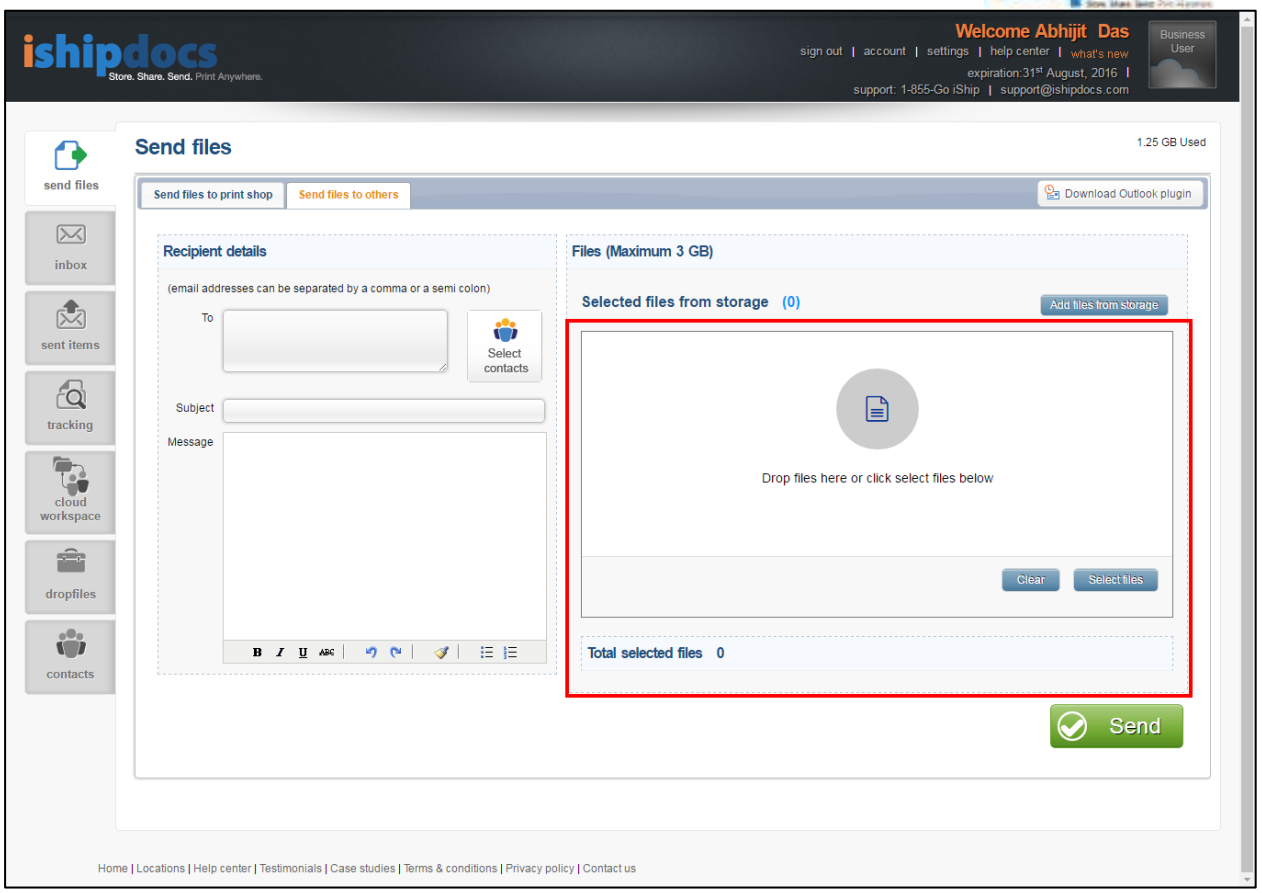
You can send files in bulk either from storage or directly uploaded files from your local system to the others (person or entity) through email from the application. In this case, the files will be send as an attachment with the email

In the **Recipient details** section enter one or more email address of recipient(s) (or select multiple email address from the Contacts section of the application), enter the **Subject** and **Message** of the email.

Note: Like, during files to print shop files can be uploaded from storage, the same can be done in this case.

Uploading Files for sending to others

Under the **Send files to others** tab on the **Send files** screen, there is the **HTML 5 Upload Tool**. This is shown in the screenshot below,



Steps to select files for upload using HTML 5 Upload Tool:

- Click on **[Select Files]** button to open the *Document Selection window* to select files/images from the local computer
- Select the files/images and then click on **[Open]** button on the *Document Selection window* to attach the files in the upload tool

  Alternatively
  - Open any folder on the local computer, drag and then drop the selected files/images in the space provided in the upload tool on the application page

The selected files/images will be displayed on the Upload Tool interface. The count of the selected files will also be displayed on the Upload tool interface.

- Click on **[Clear]** button to remove the selected files/images

After entering the relevant information user needs to click on **[Send]** button to upload the files and then send the files along with the print order to the intended recipients.

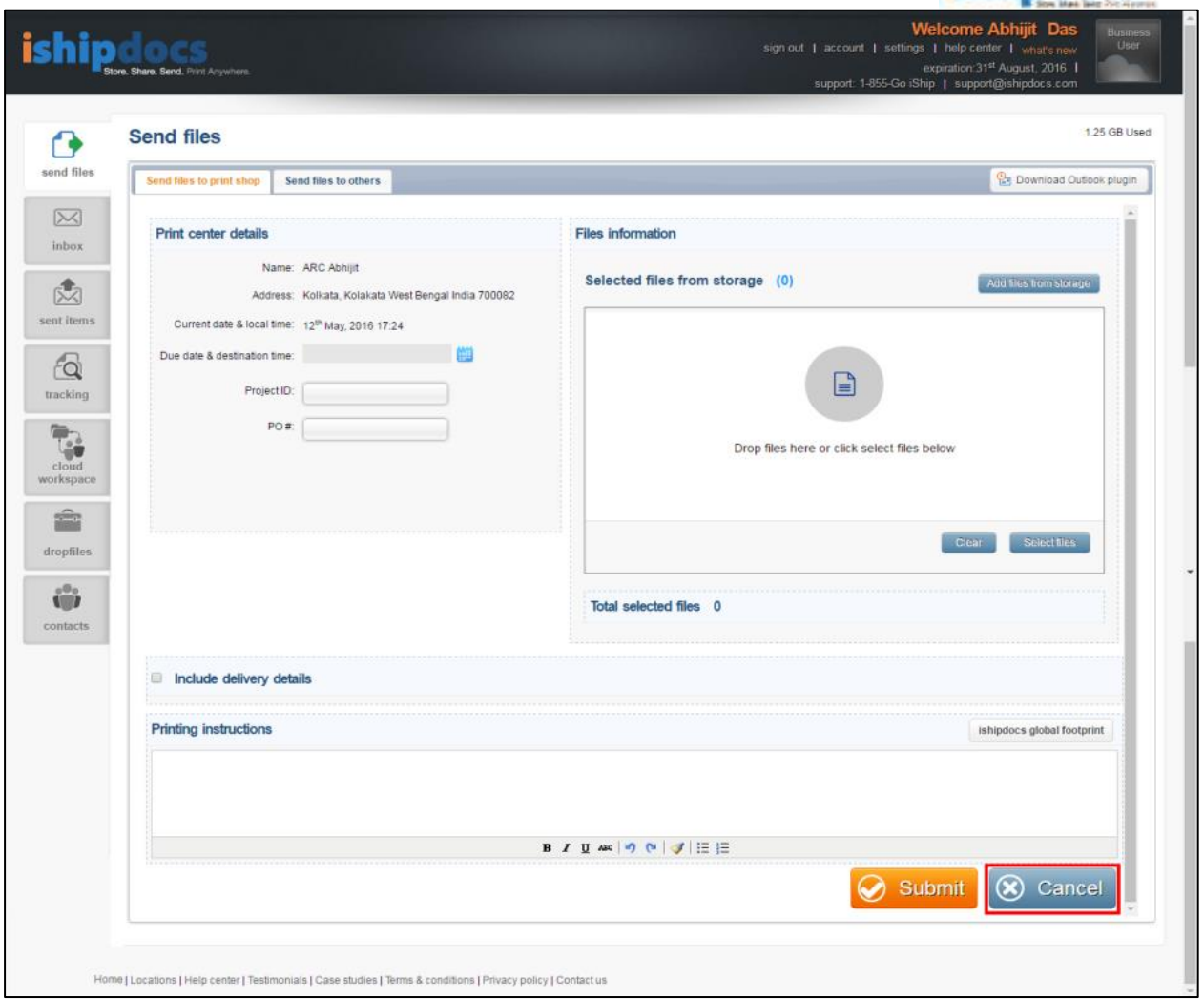
'Cancel' button

A **'Cancel'** button has been newly introduced under **Send files to print shop** tab on the **Send Files** screen. This button appears after user select files and enters all the relevant information and then clicks on the **[Submit]** button for sending the files for printing or for any other purpose.

Reasons to use Cancel button

- This button can be used to cancel transfer of files when the application displays error due to missing mandatory field data entry, wrong data entry etc. after clicking the **Submit** button
- This button can be used when user realizes after clicking **Submit** button that he/she would like to cancel file transfer

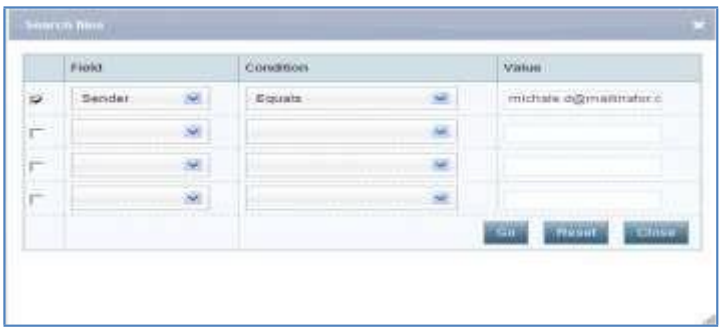
*Screenshot below displays the **Cancel** button:*



How to View Inbox

You can view the details of the mails received from the Inbox menu. Follow the given procedure to view the e-mails.

1. Click (**Inbox** icon) from the left hand panel. The **Inbox** screen appears. You can delete senders, download files, search files from this screen.
2. **Searching Files**
   a) Click **Search** button from the action bar. The **Search files** window appears.
   b) From the **Field** drop-down list, select specific option. The options are: **Sender**, **Subject**, and **Date Received**. As soon as the field gets selected the check box and the condition related to the field get selected automatically. You may change the condition as per your requirement.



Search files window

c) Enter the value related to the field.

d) Click **Go**. All the files related to the field are displayed in the inbox list.

You may reset the fields if required.

3. **Show All**

- Click **Show All** button from the action bar, the whole list of mails will get displayed.

4. **Downloading Files**

a) Click (**Download Files** icon) to download the file. The **Download files** window appears.

Download files window

b) Select the file(s) that you want to download. There are three options: **Download**, **Zip Download**, and **Copy to Storage**. By clicking **Download** you are allowed to select the file and download it as per your selection. **Zip Download** allows you to download all files in zip format and **Copy To Storage** allows you to copy the file to the existing storage.

Download

i. Select the file(s) that you want to download.

ii. Click (**Download** icon). The selected files will get downloaded.

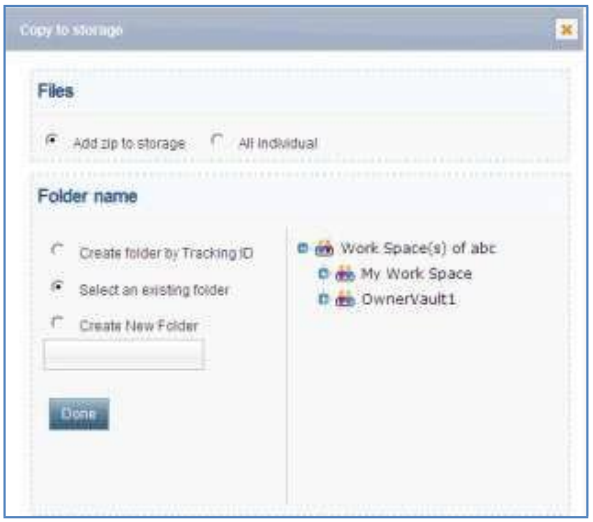
You may search the file by entering the file name and clicking **Find** button. You may also click **Show all** button to view all the files.

Zip Download

- Click **Zip Download**. All the files will get downloaded in zip format. The Non IE users can only use the Zip Download process.

Copy to Storage

i. Click **Copy To Storage**. The **Copy to storage** window appears. You can also click (**Copy to storage** icon) from the main screen. The **Copy to storage** window appears.



Copy to storage window

ii. From the **Files** section select **Add zip to storage** or **All individual**. The add zip to storage will allow you to store the zipped file and all individual option will allow to store the files individually.

iii. From the **Folder Name** section there are three options:

- **Create folder by Tracking ID:** You may create folder in the right hand panel by selecting a cabinet or a folder. Click **Done** and the files will get included within the selected cabinet or the folder.
- **Select an existing folder:** In this case you may select an existing folder from the right hand panel and click **Done**. The files will get included in the selected folder.
- **Create New Folder:** Here you may create a folder and name it in the text box below and click **Done**. The folder will be created and the files will get included in that folder.

After the file(s) get included in the storage a confirmation message appears and if the storage limit exceeds a warning message appears.

5. **Deleting Senders**

a) Select the sender from the list.

b) Click **Delete** button from the action bar. The specific sender(s) gets deleted from the list.

6. **Searching Files through Tracking Id**

a) Select the file that you want to view through tracking id.

b) Click **Tracking Id**. The history window appears. You can view the detail of the file in the screen.

history window

How to View Sent Items

You can view the details of the sent items from the sent items menu. Follow the given procedure to view the details of the sent items.

1. Click (**sent items** icon) from the left hand panel under the Toolbox. The **Sent items** screen appears. You can delete the items, display all the files, and search files from this screen.

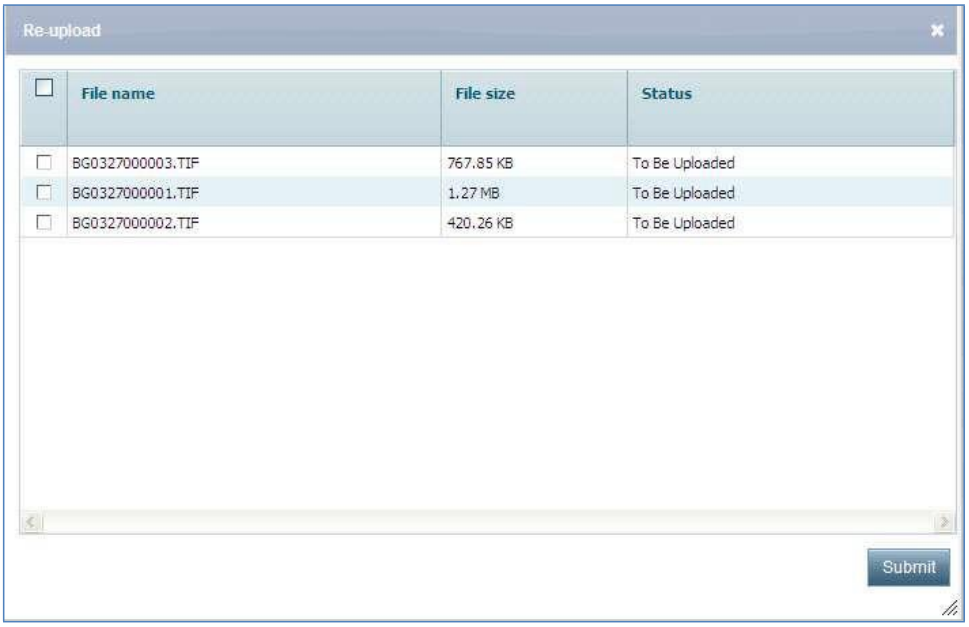
Sent items screen

2. **Re-upload**

   a) If in any case the upload is not completed, you can re-upload the file by clicking the **Re-upload** button.

   b) Select the recipient whose file is not uploaded. The **Re-upload** button will get enabled.

   c) Click the **Re-upload** button, the **Re-upload** screen appears.



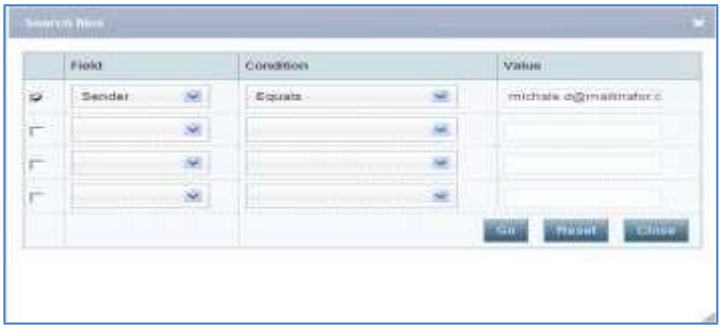
Re-upload screen

d) Select the files that you want to upload and click the **Submit** button. The uploading files screen appears as shown.

Uploading files screen

3. **Searching Files**

a) Click **Search** button from the action bar. The **Search files** window appears.



Search files

b) From the Field drop-down list, select the specific option. The options are: **Recipient**, **Subject**, and **Date Sent**. As soon as the field is selected the check box adjacent to the field and the condition get selected automatically. You may change the condition as per your requirement.

c) Enter the value related to the field.

d) Click **Go**. All the files related to the field are displayed in the inbox list.

You may reset the fields if required.

4. **Show All**
   - Click **Show All** button from the action bar, the whole list of the sent items get displayed.
5. **Deleting Items**

a) Select the check box adjacent to the recipient name from the list.

b) Click the **Delete** button from the action bar. The selected item(s) gets deleted from the list

6. **Searching Files through Tracking Id**

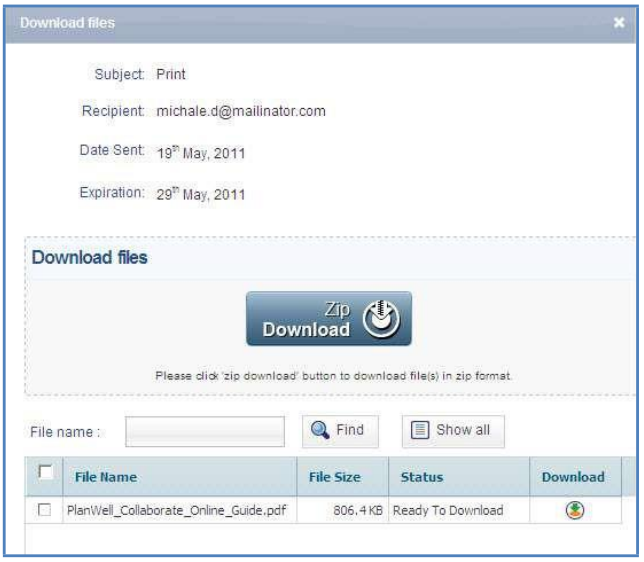
a) Select the file that you want to view through tracking id.

b) Click **Tracking Id**. The **history** window appears. You can view the detail of the file in the screen.

history window

7. **Downloading Files**

a) Select the recipient whose file you want to download. Click (**Download Files** icon) to download the file. The **Download files** window appears.



Download files

b) Select the file(s) that you want to download. There are three options: **Download**, **Zip Download**, and **Copy to Storage**. By clicking **Download** you are allowed to select the file and download it as per your selection. **Zip Download** allows you to download all files in zip format and **Copy to storage** allows you to copy the file to the existing storage.

Download

i. Select the file(s) that you want to download.

ii. Click (**Download** icon). The selected files will get downloaded.

You may search the file by entering the file name and clicking **Find** button. You may also click **Show all** button to view all the files.

Zip Download

- Click **Zip Download**. All the files will get downloaded in zip format. The Non IE users can only use the Zip Download process.

Copy to Storage

i. Click **Copy To Storage**. The **Copy to storage** window appears. You can also click (**Copy to storage** icon) from the main screen. The **Copy to storage** window appears.

ii. From the **Files** section select **Add zip to storage** or **All individual**. The add zip to storage will allow you to store the zipped file and all individual option will allow to store the files individually.

iii. From the **Folder Name** section there are three options:

- **Create folder by Tracking ID:** You may create folder in the right hand panel by selecting a cabinet or a folder. Click **Done** and the files will get included within the selected cabinet or the folder.
- **Select an existing folder:** In this case you may select an existing folder from the right hand panel and click **Done**. The files will get included in the selected folder.
- **Create New Folder:** Here you may create a folder and name it in the text box below and click **Done**. The folder will be created and the files will get included in that folder.

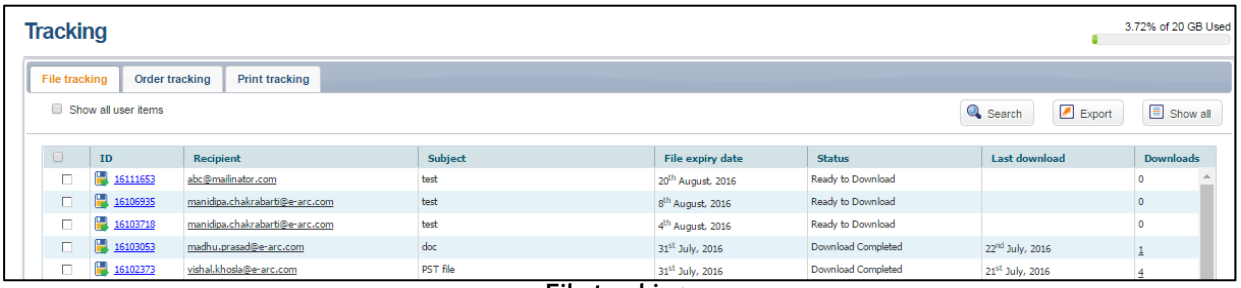
After the file(s) get included in the storage a confirmation message appears and if the storage limit exceeds a warning message appears.

How to track files

You can track files at the same time you can track print documents through this module.

Follow the given procedure to track files.

1. Click (**Tracking** icon) from the left hand panel. The **File Tracking** screen appears. You can track files as well as print the tracked file through this module.



File tracking screen

2. **File Tracking**

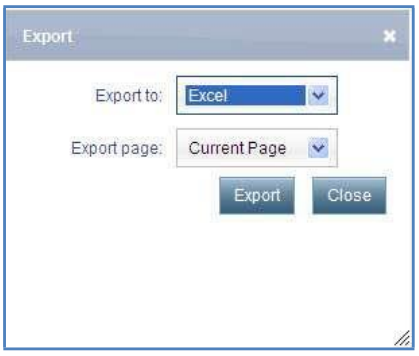
   a) **Searching Files**

      i. Enter the tracking id of the file that you want to search in the **Tracking ID#** text box. You can also select the Recipient option and track files accordingly.

      ii. Click the **Search** button from the action bar. The specific file will be displayed in the grid section. You can see the status of the file, the recipient's name, the expiry date everything related to the file.

   b) **Exporting the lists**

      i. Click the **Export** button from the action bar. The **Export** window appears.



Export window

ii. Select your preference from the **Export to** drop-down list. The options are **Excel**, **CSV**, and **XML**.

iii. Select the page you want to export from the **Export page** drop-down list. You may select **Current Page** or **All Pages**.

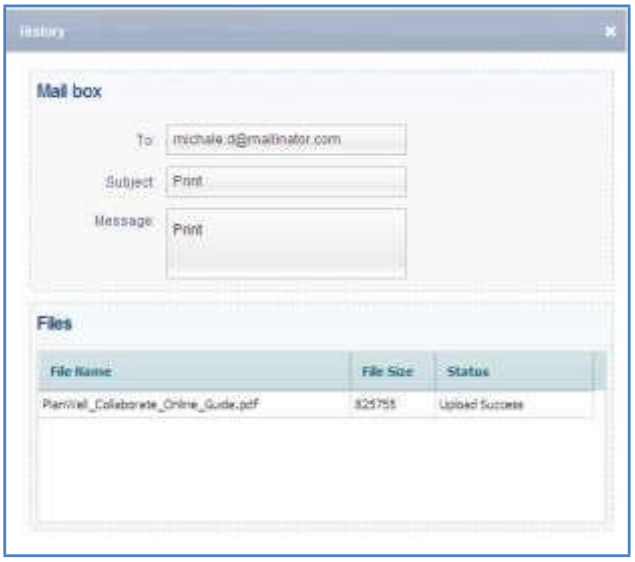
c) **Show All**

- Click the **Show All** button from the action bar, the entire list of the files with the tracking id are displayed in the grid section.

d) **Deleting Items**

i. Select the file that you want to view through tracking id.

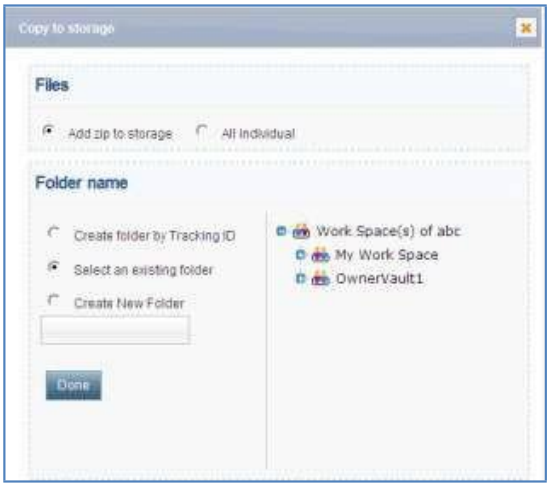
ii. Click **Tracking Id**. The **history** window appears. You can view the detail of the file in the screen.



History window

e) **Copying To Storage**

i. Click (**Copy to storage** icon). The **Copy to storage** window appears.



Copy to storage window

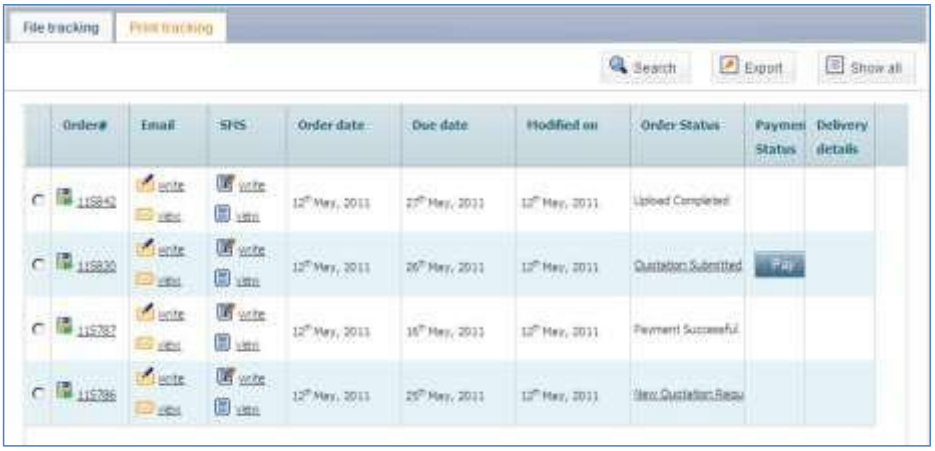
ii. From the Files section select **Add zip to storage** or **All individual**. The add zip to storage will allow you to store the zipped file and all individual option will allow to store the files individually.

iii. From the **Folder Name** section there are three options:

- **Create folder by Tracking ID:** You may create folder in the right hand panel by selecting a cabinet or a folder. Click **Done** and the files will get included within the selected cabinet or the folder.
- **Select an existing folder:** In this case you may select an existing folder from the right hand panel and click **Done**. The files will get included in the selected folder.
- **Create New Folder:** Here you may create a folder and name it in the text box below and click **Done**. The folder will be created and the files will get included in that folder.

After the file(s) get included in the storage a confirmation message appears and if the storage limit exceeds a warning message appears.

3. **Print Tracking**
   - Click **Print Tracking** tab, the **Print tracking** screen appears.



Print tracking screen

a) **Searching Files**

i. Click **Search** button from the action bar. The **Search orders** window appears.

Search orders window

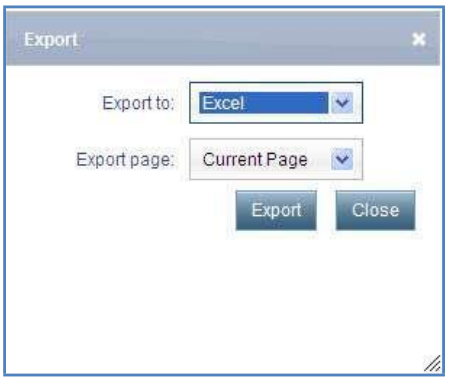
ii. Select the field from the Field drop-down list. The options are: **Order #**, **Order date**, **Due date**, **Modified on**, and **Status**. As soon as the field gets selected the check box and the condition related to the field get selected automatically. You may change the condition as per your requirement.

iii. Enter the value related to the field.

iv. Click **Go**. All the files related to the field are displayed in the Print Tracking grid section. You can see the status of the file, the recipient's name, the order date, the due date, the modification date, the status and the delivery details everything related to the files.

b) **Exporting the lists**

i. Click the **Export** button from the action bar. The **Export orders** window appears.



Export window

ii. Select your preference from the **Export to** drop-down list. The options are **Excel**, **CSV**, and **XML**.

iii. Select the page you want to export from the **Export page** drop-down list. You may select **Current Page** or **All Pages**.

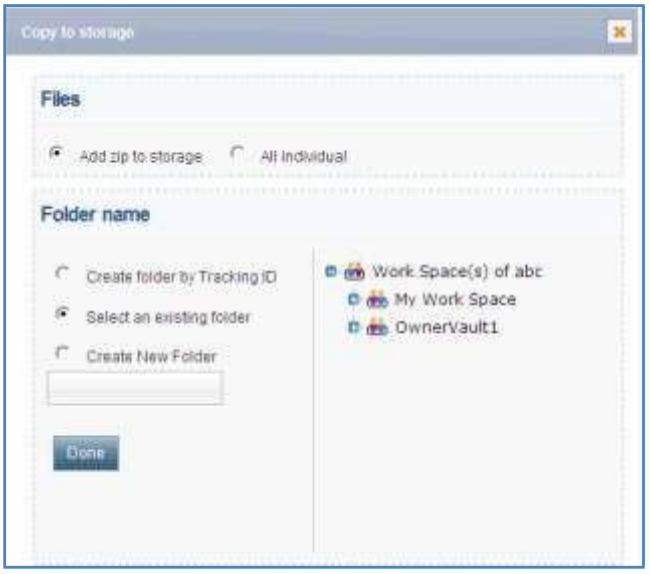
iv. Click **Export**. The page(s) gets exported.

c) **Show All**

- Click the **Show all** button from the action bar, the entire list of the files with the Order Id are displayed in the Print Tracking list.

d) **Copying to Storage**

i. Click (**Copy to storage** icon). The **Copy to storage** window appears.



Copy to storage window

ii. From the **Files** section select **Add zip to storage** or **All individual**. The add zip to storage will allow you to store the zipped file and all individual option will allow to store the files individually.

iii. From the **Folder Name** section there are three options:

- **Create folder by Tracking ID:** You may create folder in the right hand panel by selecting a cabinet or a folder. Click Done and the files will get included within the selected cabinet or the folder.
- **Select an existing folder:** In this case you may select an existing folder from the right hand panel and click **Done**. The files will get included in the selected folder.
- **Create New Folder:** Here you may create a folder and name it in the text box below and click **Done**. The folder will be created and the files will get included in that folder.

e) **Sending Email**

i. Click **write** adjacent to for which tracking id you want to send an email. The **Write Email** window appears.

Write Email

ii. Enter the mail id of the person whom you want to send an email in the **To** text box. You may enter ids in **CC** and **BCC** text boxes as well.

iii. Subject will come automatically. You may change the subject if required.

iv. Enter the message in the **Message** text box.

v. Click **Send**.

vi. Click **Close** after sending the email. The window will close automatically. You may also print the email by clicking the **Print** button.

f) **Sending SMS**

i. Click **write** adjacent to for which tracking id you want to send a SMS. The **Write SMS** window appears.

Write SMS window

ii. Enter the phone number whom you want to send a SMS in the **To** text box.

iii. **Subject** will come automatically. You may change the subject if required, but you have to keep in mind number of characters allowing for SMS is 70 only.

iv. Enter the message in the **Message** text box.

v. Click **Send**.

vi. Click **Close** after sending the SMS. The window will close automatically. You may also print the SMS by clicking the **Print** button.

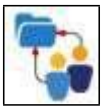
You can track the order by viewing the status of the order and when the delivery completes (**Delivery info** icon) appears for the particular order. Click (**Delivery info** icon). You will get the delivery information from the Delivery Information Details window.

Note: Another tab **'Order Tracking'** is similar to **'Print Tracking'** but it shows tracks of customer print orders from a PSP whereas personally logged-in user print orders are displayed under the 'Print Tracking' tab.

How to add files in Storage

From this module you can able to store files in different folder. You can create your own folder or you can keep the files in the existing folders as per your requirement.

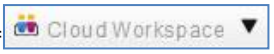
Follow the given procedure to store your files.

- Click  (**cloud workspace** icon) from the left hand panel. The **cloud workspace** screen appears.

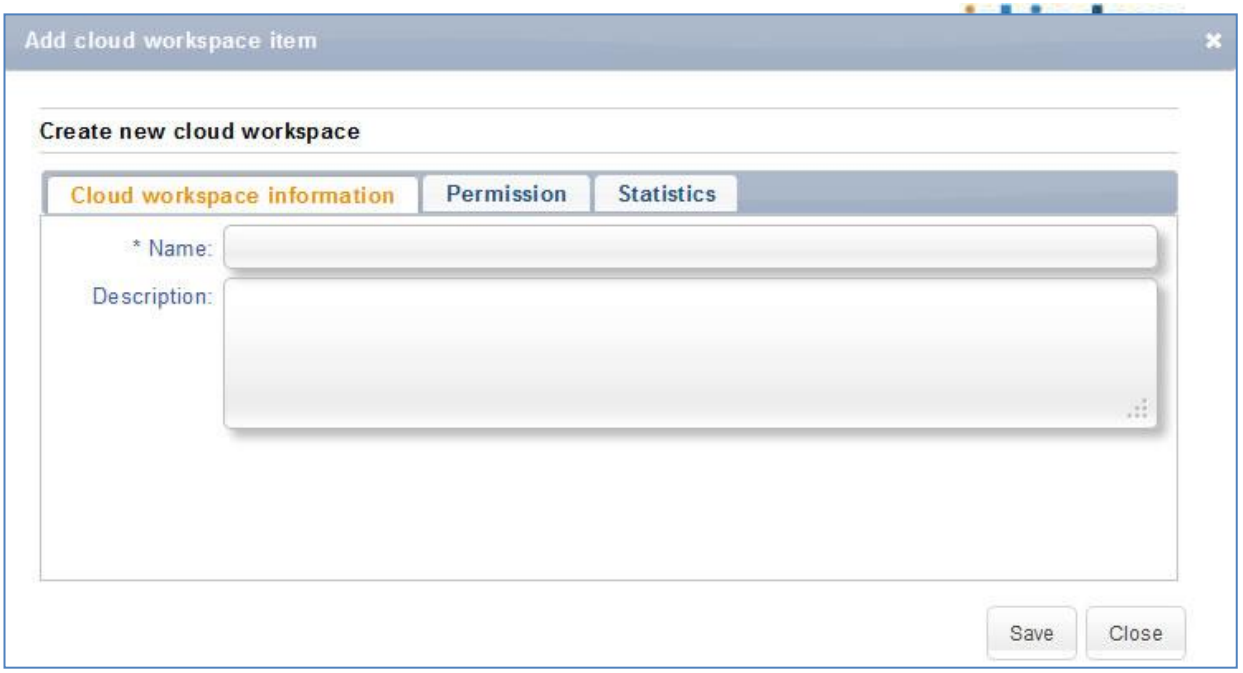
Cloud Workspace

Adding Workspace

Follow the given procedure to add workspace.

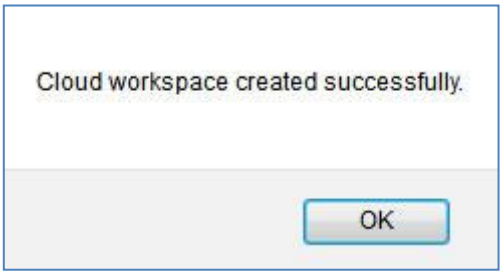
1. Place the cursor in the downward arrow of  . Three options will appear in the drop-down list: **Add/Edit work space**, **Remove work space** and **Set alert**.

2. Select (**Add/Edit work space** icon). Make sure that the **Work Space(s) of some company name** is selected at the time you want to add another work space. The **Add/Edit Work Space Item** window pops up. The window has three tabs: **Work**



Add Work Space Item

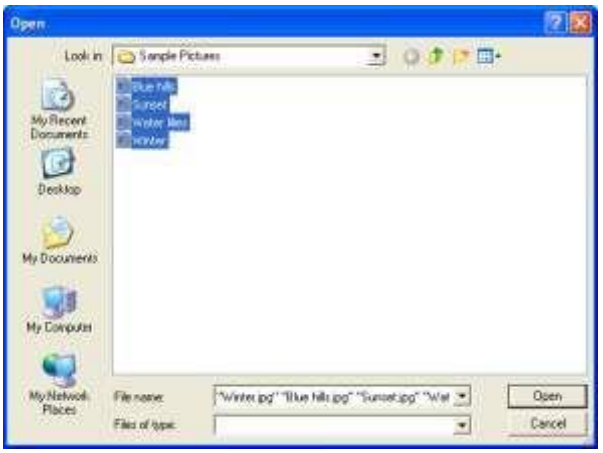
3. In the **Work space Information** tab:
   a) Enter the name of the work space in the **Name** text box. This field is mandatory.
   b) Enter the work space description if required in the **Description** text area.
4. Click **Create**. The confirmation message appears.



Confirmation message

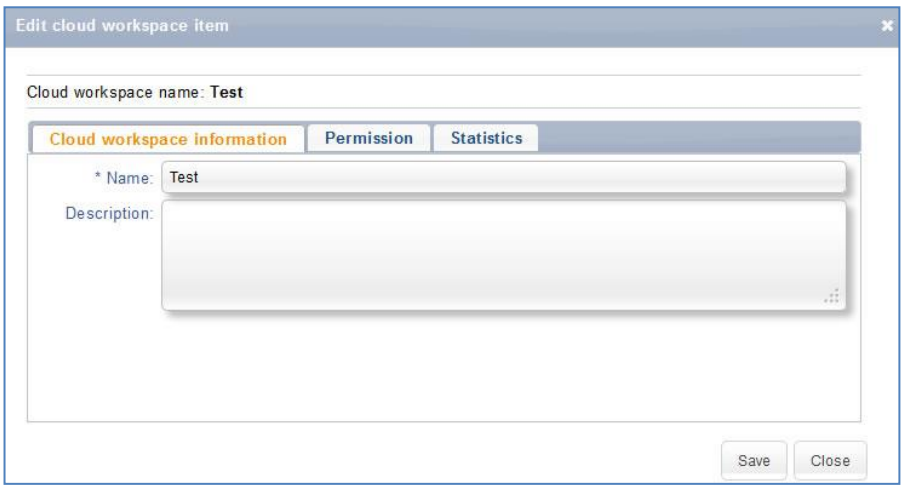
5. Click **OK**. The Workspace is created automatically.
6. Click **Close** to close the window.
7. Select the workspace that you have created to upload files.
8. Click **Add/Upload files**. The **Upload Document** window appears.

9. Click **Select Files**. The **Open** dialog box appears.



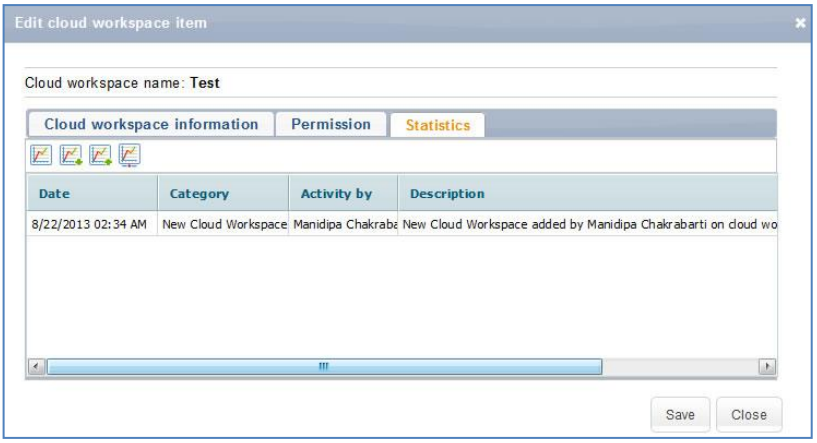
Open dialog box

10. Select the file that you want to upload from the particular location.
11. Click **Open**. The files get inserted in the **Upload Document** window.
12. Click **Upload**. The files get uploaded in the workspace or the folder that you have selected.
13. Click **Close** to close the screen.
14. Click **Add/Edit Work Space**.
15. If you click **Add/Edit Work Space**, the **Edit Work Space Item** screen appears as shown.



Edit Work Space Item screen

16. Click **Statistics**. All the operational occurrences will be displayed as shown.



Statistics tab

17. Click **Close** to close the screen.

Removing Work space

Follow the given procedure to remove workspace.

1. Select the work space you want to remove and place the cursor in the downward arrow of

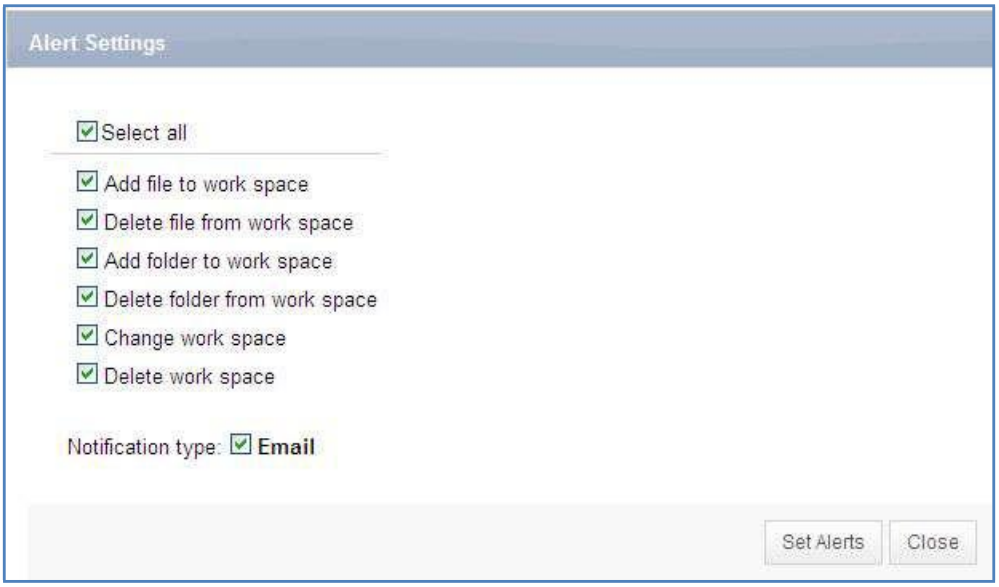
.
2. Click the second icon (**Remove work space** icon). A warning message appears.
3. If you are confirmed that you want to delete the work space then click **OK**. The confirmation message appears stating "Selected work space deleted successfully".
4. Click **OK** and the selected work space gets deleted from the tree.

Setting Alerts

Follow the given procedure to set alerts.

1. Select the work space for which you want to set alert.
2. Place the cursor in the downward arrow of

3. Click the third icon (**Set alert** icon). The **Alert Settings** window popped up. There are lots of options.



Alert Settings window

4. For setting notification for the file(s), select the appropriate options or you can select the options altogether by selecting **Select All** check box. The **File Alert Subscription** section consists of the following options:
    - **Add file to work space:** If you select this check box, any file added to workspace will be notified.
    - **Delete file from work space:** If you select this check box, any file gets deleted from the workspace will be notified to other members.
    - **Add folder to work space:** If you select t this check box, any folder gets added to workspace will be notified to other members.
    - **Delete folder from work space:** if you select this check box, any folder gets deleted from the workspace will be notified to other members.
    - **Change work space:** If you select this check box, any change in work space will be notified to other members.
    - **Delete work space:** If you select this check box, any work space gets deleted from the list will be notified to the members.
5. Select **e-mail** as a mode of notification.
6. Click **Set Alerts** to set the notification alert as per your selection. The confirmation message appears to confirm successful settings.
7. Click **OK**.
8. Click **Close** to exit from the **Alert Settings** window.
9. If you want to set alert for all the options directly select **Select All** check box. All the options get selected automatically. You can also select individual options as per your requirement.

10. Select **Email** in the **Notification Alert Type**.
11. Click **Set Alerts**. The confirmation message appears.
12. Click **OK**.
13. Click **Close** to close the window.

Folders

Adding Folders

Follow the given procedure to add folders.

1. Select the folder or work space where you want to add another folder.
2. Click the downward arrow of

. Different options will appear.
3. Click the first option (**Add Folder** icon). The **Add Work Space Item** window pops up. The window has two tabs: **Folder information** and **Statistics**. The Folder information is displayed by default.

Add Work Space Item

4. Enter the folder name in the **Folder Name** text box.
5. Click **Create**. A confirmation message appears.

Confirmation message

6. Click **OK**. The folder will be created.
7. Click **Add/Upload** from the **Files** drop-down list. The **Upload Document** window appears.
8. Click **Select Files**. The **Open** dialog box appears.
9. Select the file(s) that you want to upload from a particular location.
10. Click **Open**. The file(s) get selected in the **Upload Document** window.
11. Click **Upload**. The file(s) get uploaded in the **Files** section in the right hand panel.
12. Click **Close** to close the window.

Editing Folder

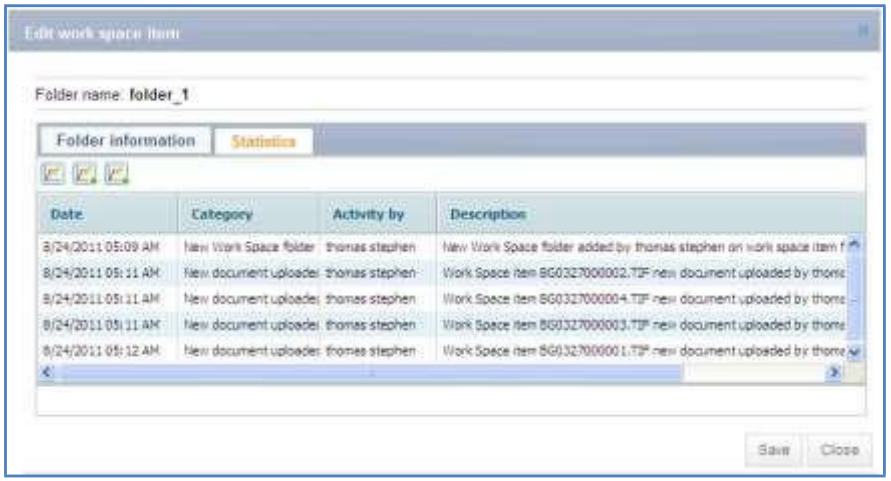
Follow the given procedure to edit folder.

1. Select the folder or vault that you want to modify.
2. Click the downward arrow of

. Different options will appear.
3. Click the second option (**Edit Folder** icon). The **Edit Work Space Item** window pops up.

Edit Work Space Item window

4. Modify the information in the **Folder information**.
5. Click **Statistics** tab. All the operational activities are displayed in the **Statistics** tab as shown.



Statistics tab

6. Click **Save**. A confirmation message appears and the folder gets updated successfully.

Deleting Folder

Follow the given procedure to delete folder.

1. Select the folder that you want to delete.
2. Click the downward arrow of

. Different options will appear.

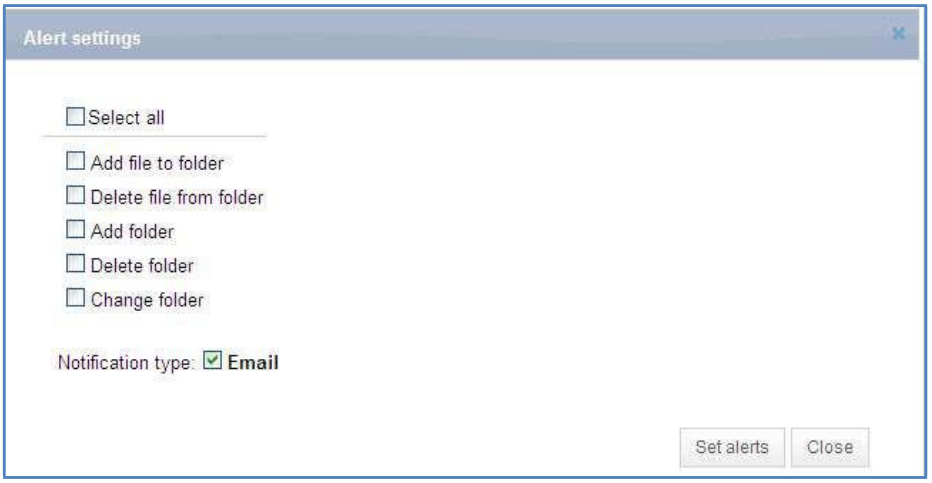
3. Click the third option (**Delete Folder** icon). A warning message pops up asking whether you are sure that you want to delete the folder.
4. Click **OK**, if you really want to delete the folder. Your folder gets deleted from the list.

Setting Alert

Follow the given procedure to set alert.

1. Select the folder for which you want to set the alert.
2. Click the downward arrow of

. Different options will appear.
3. Click the fourth option (**Set Alert** icon). The **Alert Setting** window pops up. There are lots of options.



Alert Setting window

4. For setting notification for the file(s), select the appropriate options or you can select the options altogether by selecting **Select All** check box. The **File Alert Subscription** section consists of the following options:
   - **Add file to folder:** If you select this check box, any file added to folder will be notified.
   - **Delete file from folder:** If you select this check box, any file gets deleted from the folder will be notified to other members.
   - **Add folder:** If you select t this check box, any folder gets added will be notified to other members.
   - **Delete folder:** If you select this check box, any folder gets deleted will be notified to other members.

- **Change folder:** If you select this check box, any change in folder will be notified to other members.

5. Select **e-mail** as a mode of notification.
6. Click **Set Alerts** to set the notification alert as per your selection. The confirmation message appears to confirm successful settings.
7. Click **OK**.
8. Click **Close** to exit from the **Alert Settings** window.

Refreshing the Page

Follow the given procedure to refresh page.

Click (**Refresh** icon). The Work Space section gets refreshed.

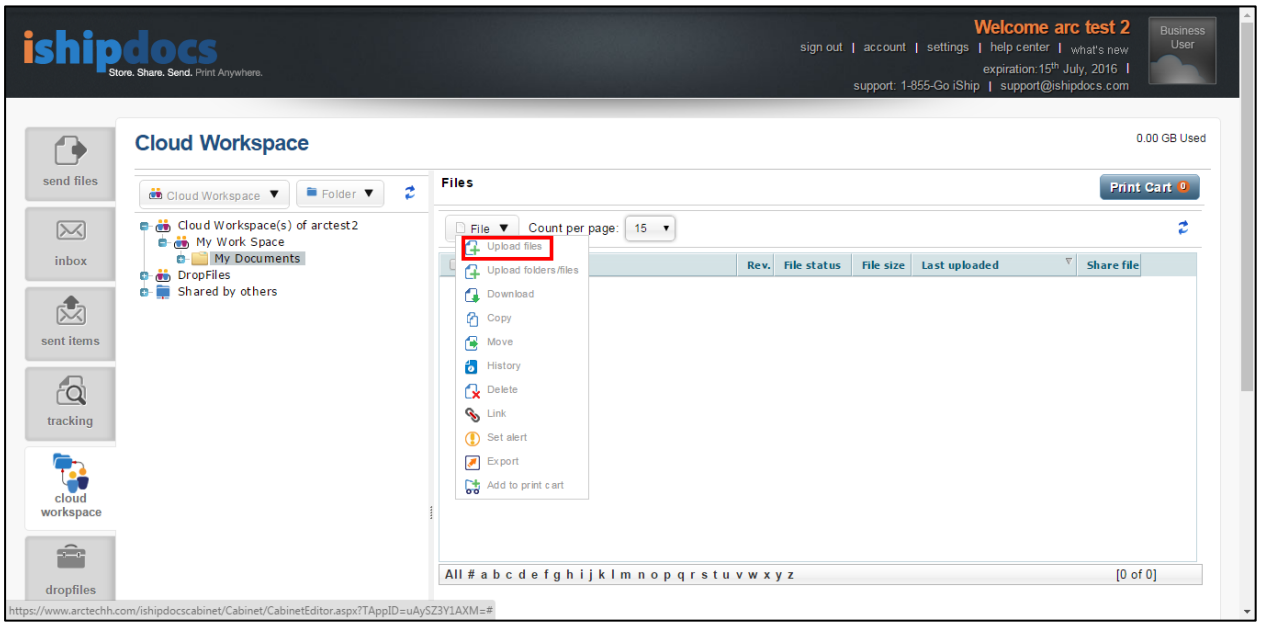
Files

Adding Files

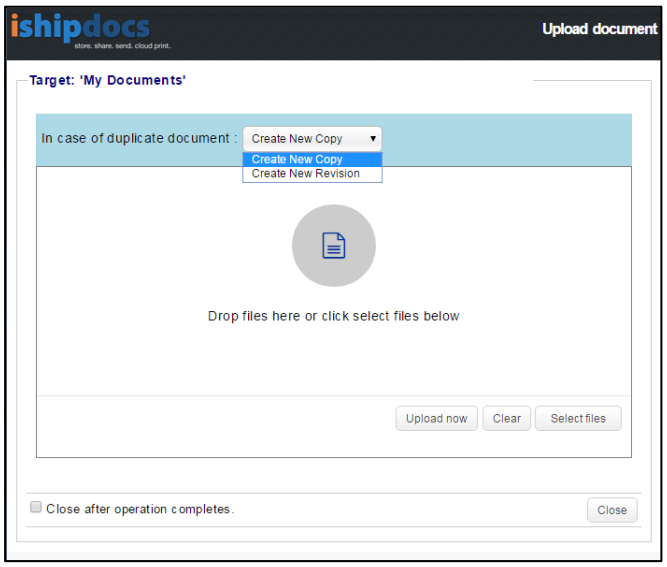
Silverlight Upload Tool has also been replaced with *HTML 5 Upload Tool* for uploading file in **Cloud Workspace**.

Go to **Cloud Workspace** > Click on the Folder where you would like to upload the file(s) from the left-hand panel > Click on **File** drop-down > Click on **Upload Files** menu item

Screenshot below highlights the **Upload Files** menu item on the **Cloud Workspace** screen,



The **HTML 5 Upload Tool** will now open up instead of the **Silverlight Upload Tool**. This screen is shown below,

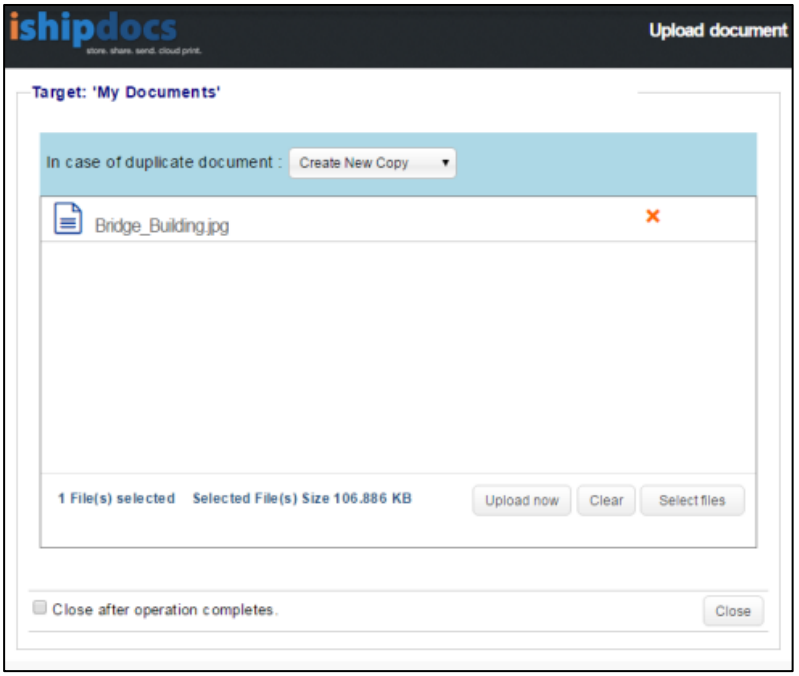


Steps to demonstrate upload of files:

- Click on **[Select Files]** button to open the *Document Selection window* to select files/images from the local computer
- Select the files/images and then click on **[Open]** button on the *Document Selection window* to attach the files in the upload tool

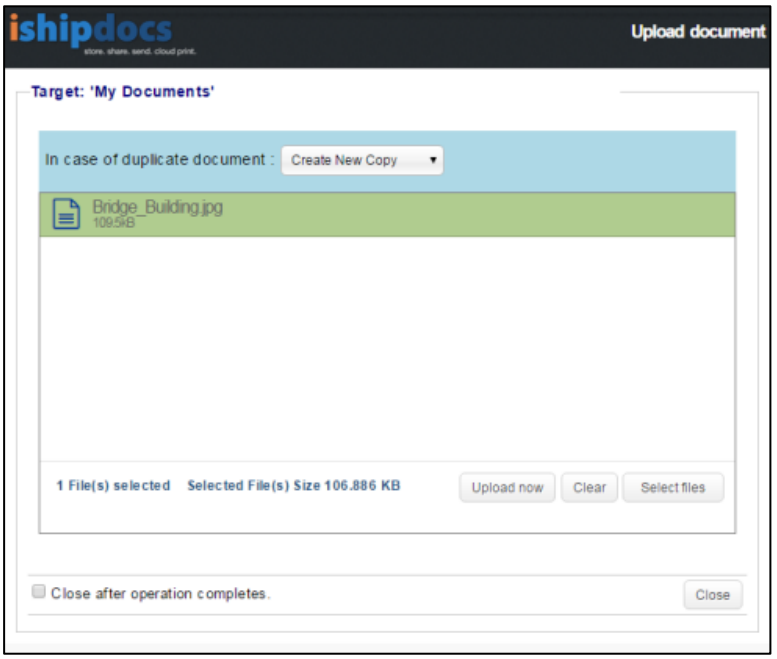
  Alternatively
  - Open any folder on the local computer, drag and then drop the selected files/images in the space provided in the upload tool on the application page

    The selected file is shown in the screenshot below,



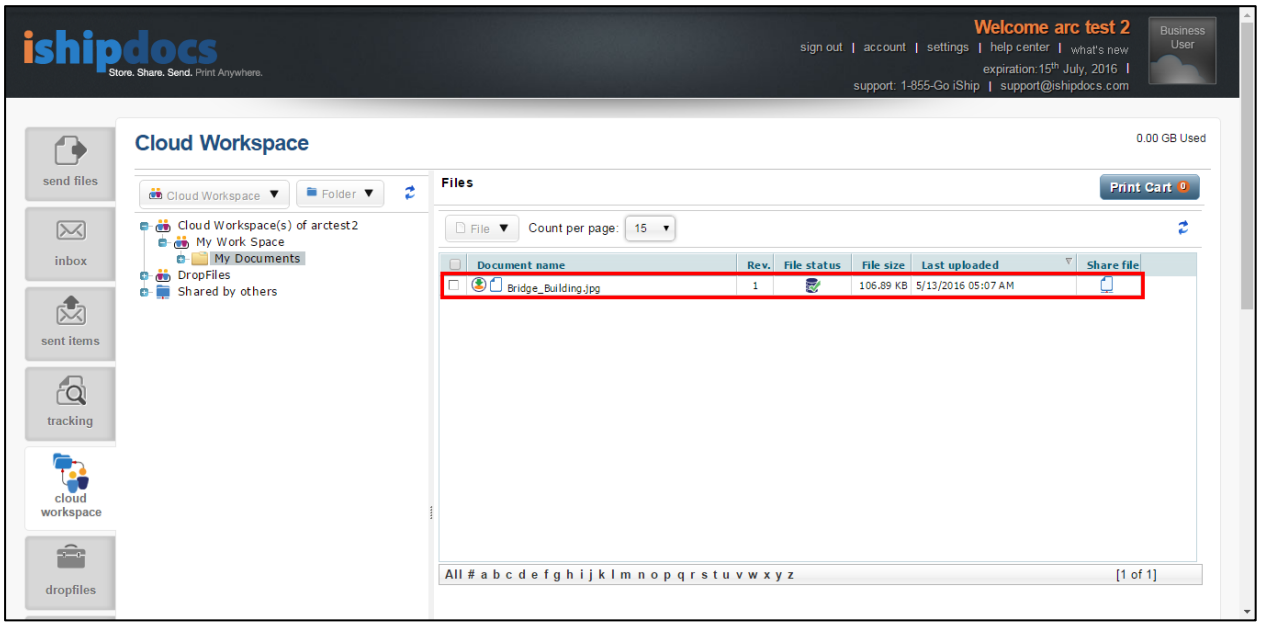
- Click on **[Upload Now]** button to start the uploading process
- *Optionally:* Tick the checkbox **Close after operation completes** will automatically close the open Upload Tool window after the completion of upload
- *Optionally:* Select the option **Create New Copy,** if an already existing file in the application is being uploaded again. This will create a new copy of the already existing file. Select the option

Create New Revision if a new revised version of the document with the same name is being uploaded again. Below screenshot displays the successfully uploaded file on the Upload Tool interface:



- *Is needed:* Click **[Clear]** button to remove the selected files
- After the completion of successful upload, click **[Close]** to close the window

Screenshot below displays the successfully uploaded file under the target folder:



Copying Files

Follow the given procedure to copy files.

1. Select the files that you want to copy from one folder to another folder.

2. Click the downward arrow of . Different options will appear.
3. Click (**Copy files** icon). The **Select Folder** window popped up.

Select folder window

4. Select the folder where you want to copy the files. A warning message appears stating whether the user is sure to copy the file in that particular location.
5. Click **OK** if you are sure to copy that file in that particular location.
6. Click **Close** to close the window. The file will be copied to the folder as per your choice.

Moving Files

Follow the given procedure to move files.

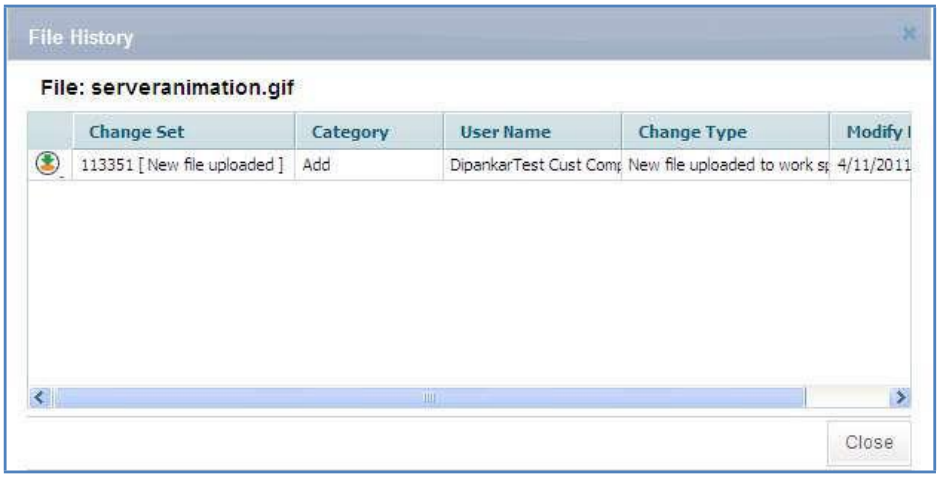
1. Select the files that you want to move from one folder to another folder.
2. Click the downward arrow of File . Different options will appear.
3. Click (**Move files to other folder** icon). The **Select Folder** window popped up.
4. Select the folder where you want to move the files. A warning message appears stating whether the user is sure to move the file in that particular location.
5. Click **OK** if you are sure to copy that file in that particular location.
6. Click **Close** to close the window. The file will be moved to the folder as per your choice.

Viewing History

Follow the given procedure to view history.

1. Click the downward arrow of

. Different options will appear.
2. Click (**View file history** icon). The **File History** window popped up, where you can see the files history.



File History window

3. Click **Close** to close the File History window.

Deleting Files

Follow the given procedure to delete files.

1. Click the downward arrow of

. Many options will appear.
2. Click (**Delete files** icon). A warning message pops up asking whether you are sure that you want to delete the file(s).
3. Click **OK**. A confirmation message appears stating "Selected documents successfully deleted".
4. Click **OK**. The document(s) gets deleted from the selected folder.

Linking Files

Follow the given procedure to link files.

1. Select the folder or cabinet from the Cabinets section. The files within the folder those are uploaded are displayed in the Cabinet Files list.
2. Click the downward arrow of

. Different options will appear.
3. Click the sixth option (**Link files** icon). The **Document Download Link(s)** window popped up. The link of the download link is displayed by default.

Document Download Link(s)

4. You may or may not want to add expiry date. Adding expiry date implies that the file can be downloaded before the expiry date only and if the date exceeds due to any reason you won't be able to find out the file.
   a) Select **Add expiry date** check box to add the expiry date.
   b) Click (**Calendar** icon) to add the expiry date from the calendar.
   c) To remove the expiry date, deselect the **Remove expiration date** check box. This means there is no stipulated time frame for downloading the package.
   d) Click **Individual Expiration Date** to create your own expiry date.
5. Click **Create Link** and the link gets added under **Document Package Download Link(s)** text area.

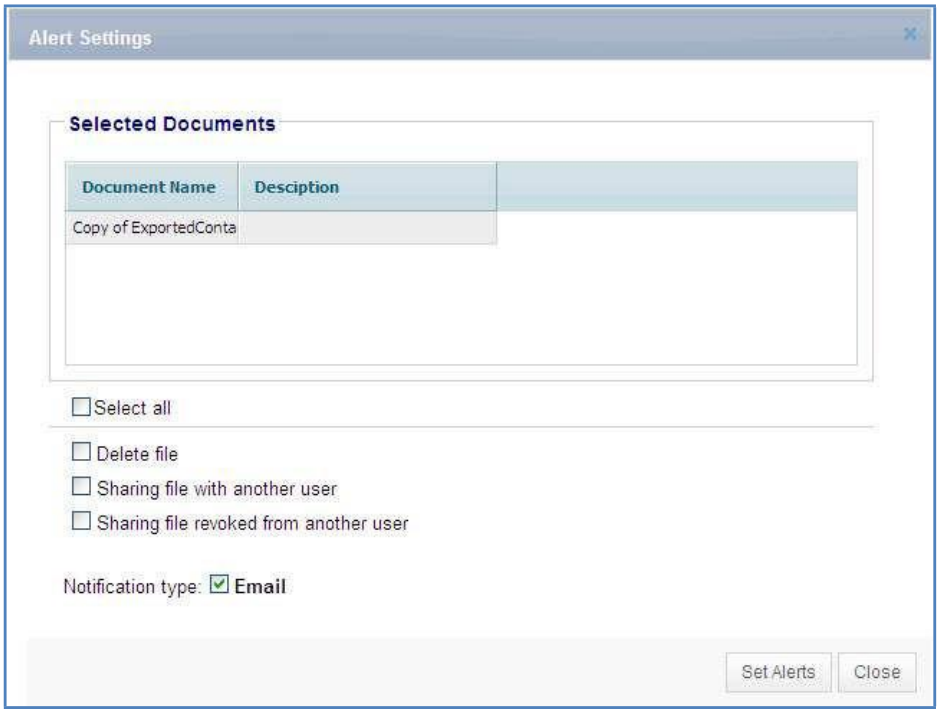
6. Click **Copy to Clipboard**. The confirmation message appears stating links get successfully added to the clipboard.
7. Click **Close**. The link gets copied to the clipboard.

Setting Alert

Follow the given procedure to set alert.

1. Select the folder or cabinet from the Cabinets section. The files within the folder those are uploaded are displayed in the Cabinet Files list.
2. Select the file(s) from the list for which you want to set alert.
3. Click the downward arrow of

. Different options will appear.
4. Click the seventh option (**Subscribe for alert** icon). The **Alert Settings** window popped up. The selected documents get displayed under **Selected Documents** section.



Alert Settings window

5. For setting notification for the file(s), select the appropriate options. The **File Alert Subscription** section consists of the following options:
   - **Delete File:** If you select this option, any file deleted will be notified.
   - **Sharing file with another user:** If you select this option, any file shared to some other person will be notified to other members.

- **Sharing file revoked from another user:** If you select this option, any file sharing cancelled or withdrawn from someone will be notified to other members.

6. Select **E-mail** as a mode of notification.
7. Click **Set Alerts** to set the notification alert as per your selection. The confirmation message appears to confirm successful settings.
8. Click **OK**.
9. Click **Close** to exit from the **Alert Settings** window.

Exporting the List of Files

Follow the given procedure to export the list of files.

1. Select the folder or cabinet from the Cabinets section. The files within the folder those are uploaded are displayed in the Cabinet Files list.
2. Click the downward arrow of

. Many options will appear.
3. Click the eighth option (**Export** icon). The **Export Data** window popped up.

Export Data window

4. Select the type of format from the Format drop-down list. The options are **Excel**, **CSV**, and **XML**. Selecting specific option will enable the list of files to get exported according to that particular format.
5. Click **Export**. The **File Download** dialog box appears.
6. Click **Open** to view the document that gets exported then save it to a particular location or else click **Save**. The **Save As** dialog box appears. Select the specific location where you want to save the document and click **Save**. The document gets saved into that particular location and the confirmation message appears.
7. Click **Close** to close the **Export Data** window.

Refreshing the Page

Follow the given procedure to refresh the files section.

Click (**Refresh** icon). The Files section gets refreshed.

Downloading File

Follow the given procedure to download file.

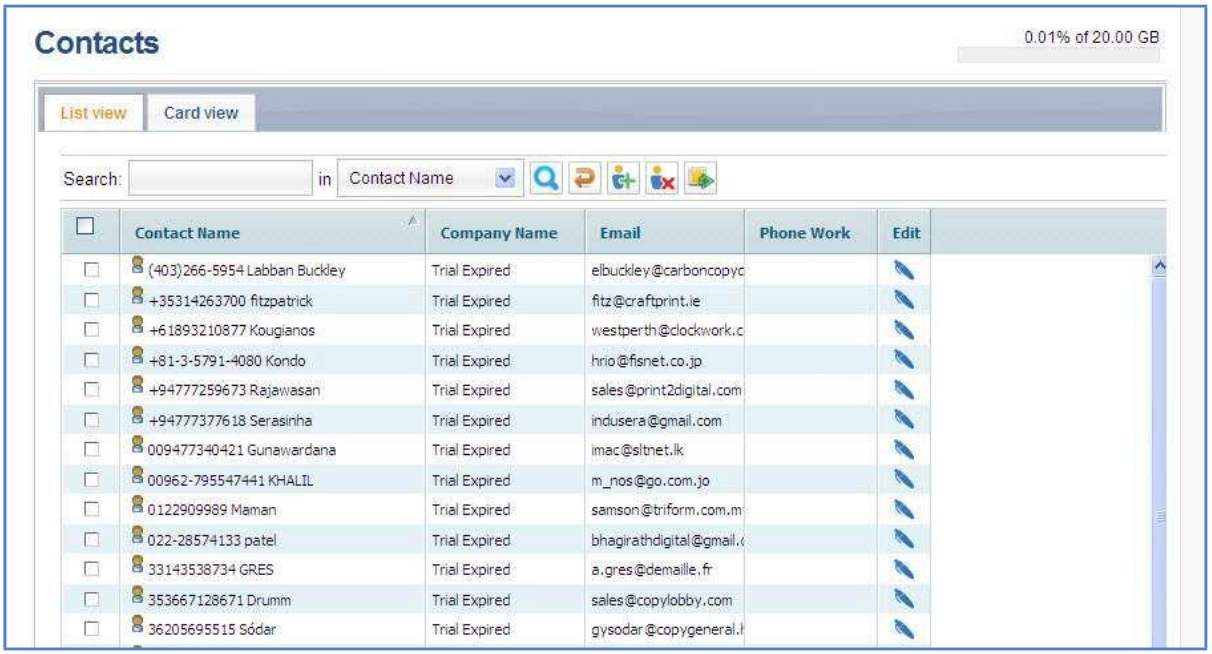
1. Select the folder or workspace. The list of files within the folder is displayed.
2. Select the file from the list that you want to download.
3. Click (**Download** icon). The **File Download** dialog box appears.
4. Click **Open** to view the file or **Save** to save the file in a particular location in your machine.

How to Manage Contacts

From this module you can able to manage the address book. You may search, add contacts, add groups as well as export the list if required.

Follow the given procedure to manage contacts.

Click (**Contact** icon) from the left hand panel. The **Contacts** screen appears. The screen has two tabs **List view** and **Card view**. The List view tab displays all the contact in form of a list and the Card view tab displays all the contacts in form of cards.



Contacts screen

List view

Searching Contacts

Follow the given procedure to search contacts.

1. Enter the search item in the **Search** text box.
2. Select the required option with which you want to search in the adjacent in text box. The options are: **Contact Name**, **Contact Last Name**, **Company Name**, **Email**, and **Phone**.
3. Click (**Search** icon). The specific option is displayed in the List view screen.

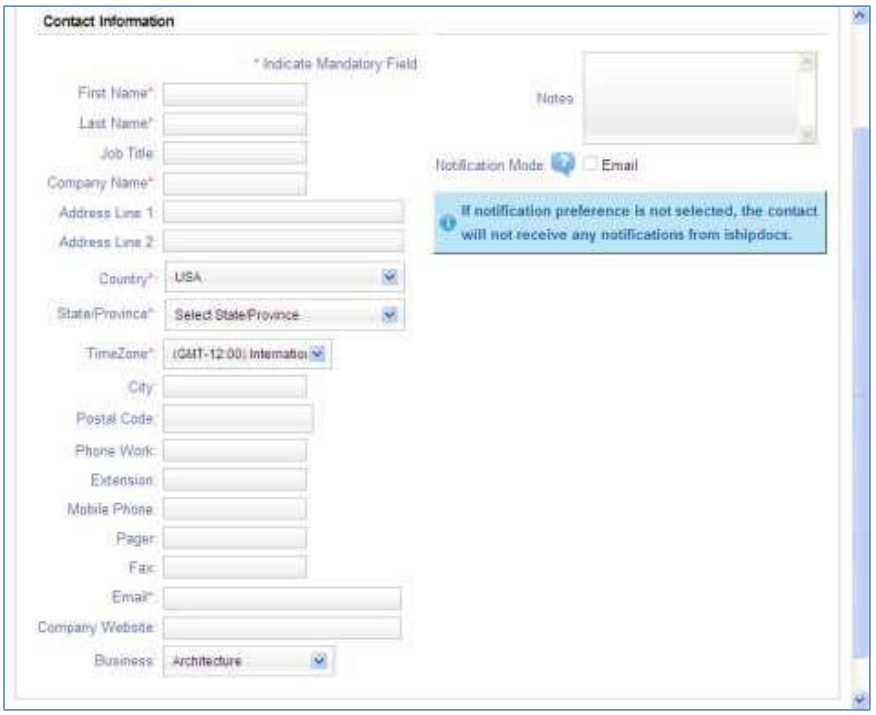
4. You may also click All / # / alphabets to search the contacts.

Click (**Reset** icon) to reset the setting.

Adding New Contact

Follow the given procedure to add new contact.

1. Click (**Add New Contact** icon) from the action bar. The **Add Contact** window appears.



Add Contact window

2. Fill up all the specific fields of the Contact Information section. The fields with the red stars are to be considered as mandatory fields, therefore you need to fill up at least those specific fields.
3. Click **Close** to close the window.

You can click **Save & Close**. This will save the information and close the window automatically. You need not have to click **Save** and then **Close** separately.

Editing Contacts

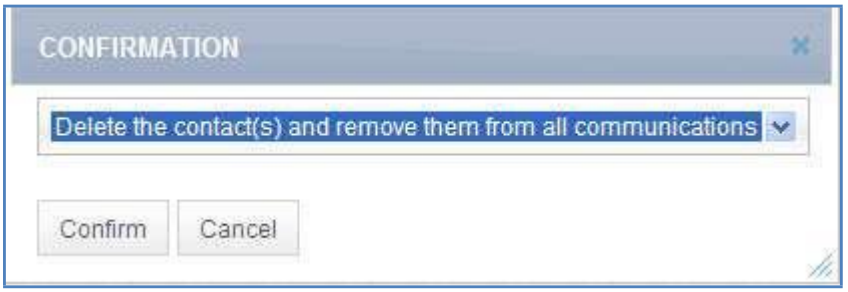
Follow the given procedure to edit contact.

1. Click (**Edit Contact** icon) from the Edit section adjacent to the contact name. The **Edit Contact** window appears. Modify the fields as per your requirement.
2. Click **Save**. A confirmation message appears if updated successfully.
3. Click **Close** to close the window.

Removing Contacts

Follow the given procedure to remove contact.

1. Select the contact(s) that you want to remove from the contact list.
2. Click (**Remove Contact** icon) from the action bar. The Confirmation window appears.



Confirmation window

3. If you are sure to delete it from the list select **Delete the contact(s) and remove them from all communications** from the drop-down list.
4. Click **Confirm**. A confirmation message appears if deleted successfully.
5. Click **OK** to continue.

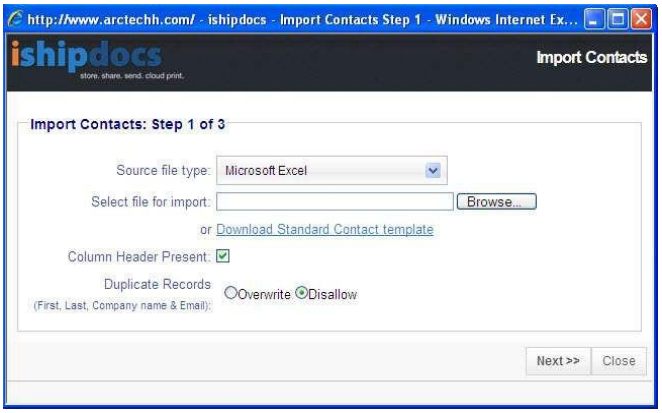
Importing/Exporting Contacts

Follow the given procedure to import/export contact.

1. Click (**Import/Export Contacts** icon) from the action bar. The **Import/export contact** window appears.

Import/export contact window

2. Select **Import Contacts** if you want to import the contacts or **Export Contacts** if you want to export contacts from the drop-down list.
3. Click **OK**.
4. **Importing Contacts:**
   i. Select **Import Contacts** from the drop-down list in the IMPORT/EXPORT CONTACT window.
   ii. Click **OK**. The **Import Contacts Step 1** window appears.



Import Contacts Step 1 window

   iii. Select the source file type from the **Source file type** drop-down list.
   iv. Click **Browse** to locate the file to import in the **Select file for import** field.

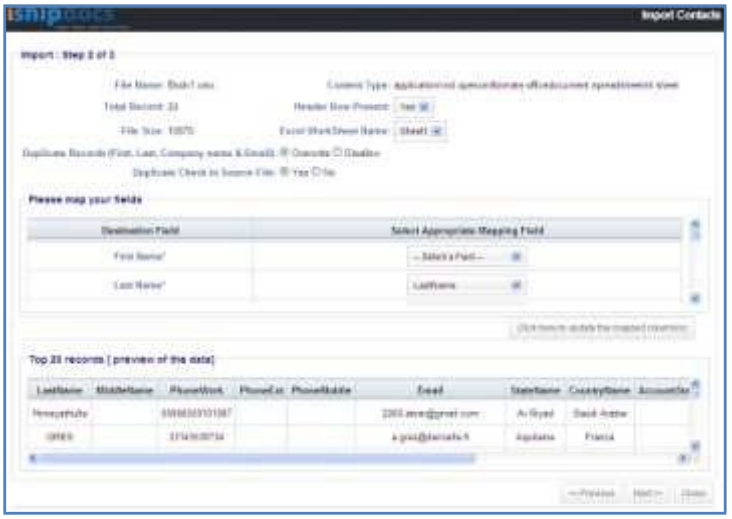
Or,

v. Click to download the standard contact template.

vi. Select the **Column Header Present** check box to make the column header available.

vii. You can overwrite the records with the same name or disallow the duplicate one. Click to select the appropriate option for the **Duplicate Records**.

viii. Click **Next** to continue. The Import Contact Step 2 window appears. The **Import Contact Step 2** window displays the records available in the file. The top 20 records are displayed for your perusal. If you want to modify certain fields, please select the appropriate option to do so.



Import Contacts Step 2 window

ix. Click **Next** to continue. The file gets imported and the import summary is displayed in the **Import Summary** window.

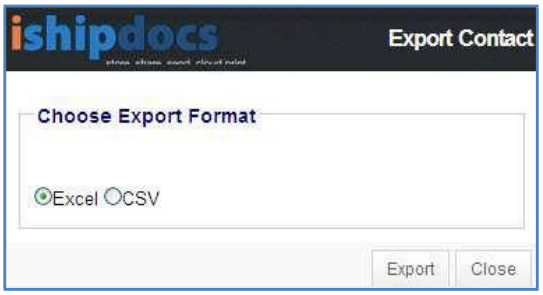
Import Summary window

x. Click **Close** to close the window.

5. **Exporting Contacts:**

i. Select **Export Contacts** from the drop-down list in the **Import/Export Contact** window.

ii. Click **OK**. The **Export Contacts** window appears.



Export Contact window

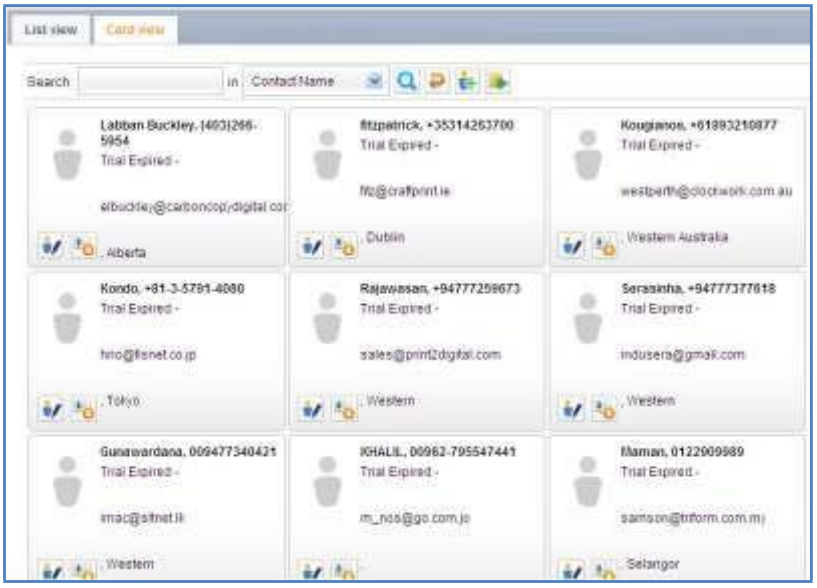
iii. Click to select the export format. You can export either excel sheets or the CSV files.

iv. Click **Export**. The **File Download** dialog box appears.

v. Click Open to open the file or click Save to save the file in a particular location

Card View

Click the **Card View** tab the **Card View** screen appears.



Card view screen

Searching Contacts

Follow the given procedure to search contacts.

i. Enter the search item in the **Search** text box.

ii. Select the required option with which you want to search in the adjacent in text box. The options are: **Contact Name**, **Contact Last Name**, **Company Name**, **Email**, and **Phone**.

iii. Click (**Search** icon). The specific option is displayed in the Card view screen.

iv. You may also click All / # / alphabets to search the contacts.

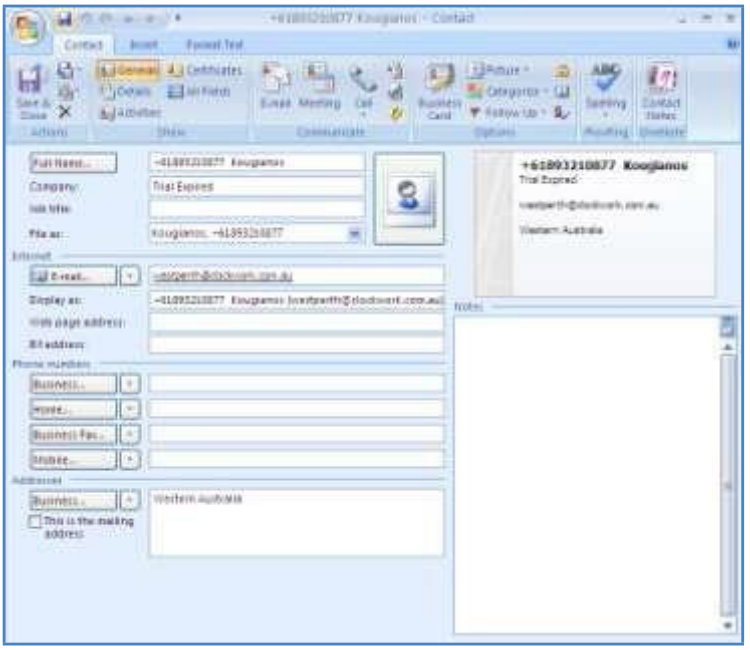
Click (**Reset** icon) to view the whole list. You can add, edit and export/import contacts by clicking (**Add New Contact** icon), (**Edit Member** icon) and (**Import/Export Contacts** icon) respectively. To know the process please go through the above section.

Downloading VCard

Follow the given procedure to download VCard.

i. Click (**Download VCard** icon). The **File Download** dialog box appears.

ii. Click **Save** to save the VCard or just click **Open** to view the Vcard. The VCard details are displayed as shown.



VCard details

Chapter 6: Functionality of ishipdocs application as a Business user

For Business User the maximum file size per transaction is 3 GB, the storage capacity is 20 GB. You are capable of using all the facilities available if you are Business User.

In this chapter you will learn about:

- Creating new seats
- How to send files
- How to view inbox
- How to select files from storage for send files to print shop
- How to view sent items
- How to track files
- How to share files
- How to send DropFiles invitation
- How to manage contacts

Creating new seats

You can avail three seats as a business user. To create more users follow the given procedure.

1. Click **account** from the action bar. The **My account** screen appears.
2. Click the **User Management** tab. The **User Management** screen appears.

User Management screen

3. Click **Add User**. The **Add User** screen appears.

Add User screen

4. Enter the following details and click **Save**. The confirmation message appears and the user gets added in the user's list. You can delete the user by clicking (**Delete** icon) as well as activate the user by clicking (**Activate** icon) if required.

How to send files

You can send files via ishipdocs to specific recipients. The file size for the free user is 3 GB. The first transaction will be free of cost from second transaction onwards you will be charged $ 5.

- Click

(**send files** icon) from the left hand panel. The **Send Files** screen appears with two tabs: **Send files to print shop** & **Send files to others**

Send files to print shop

You can send files in bulk either from storage or directly uploaded files from your local system to the print shop.

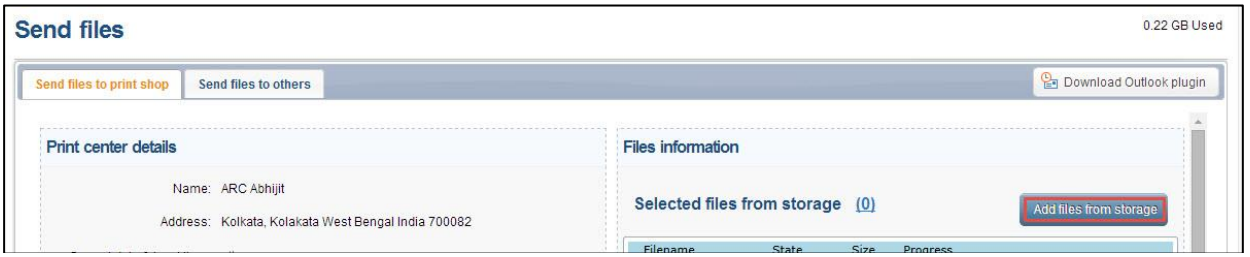
In the Print order details section enter the **Project ID** and the **Purchase order number (PO#)** on the respective fields. Rest of the fields are automatically populated by the application.

How to select files from storage for sending files to print shop

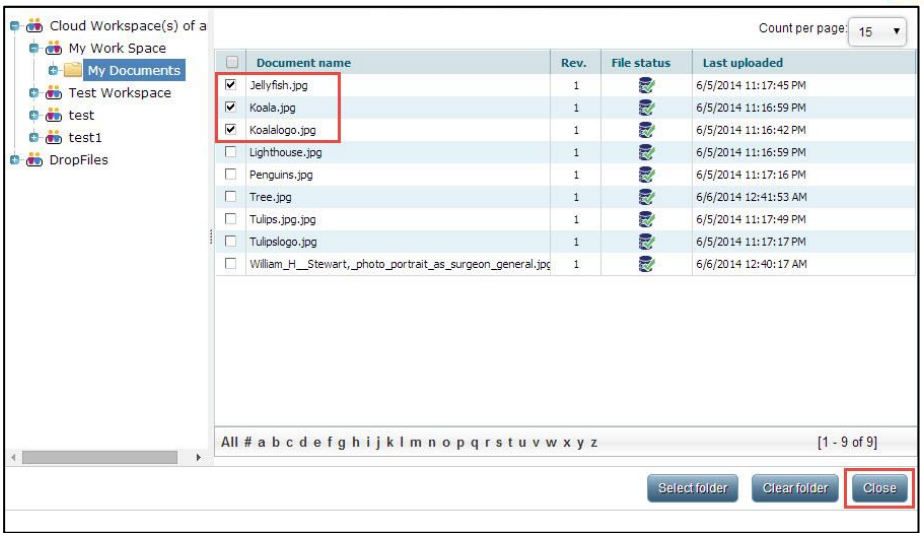
You can also add files from the cloud storage to send files to the print shop. To do so, follow the steps given below:

Note: This feature is only available for users associated with the Print Service Providers.

4. Click **Add files from storage** as shown in the image below:



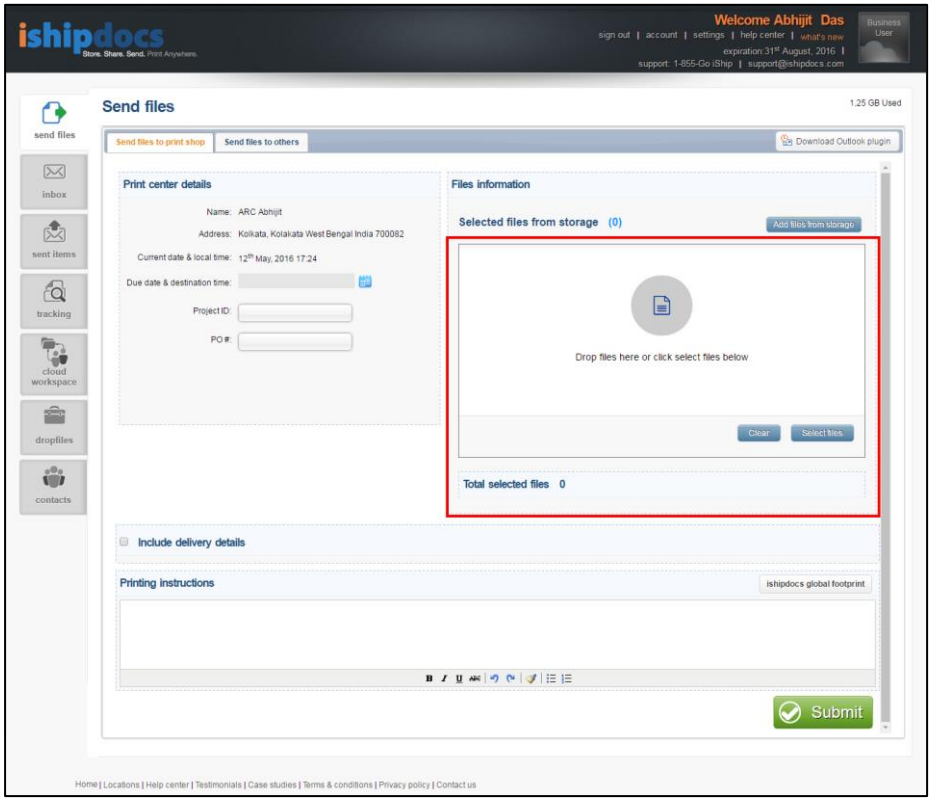
5. Select the files that you want to add and click **Close.**



6. The select files from storage will display the number of files that you have selected. You can then send these files to the print shop to print.

Uploading Files for sending to Print Shop

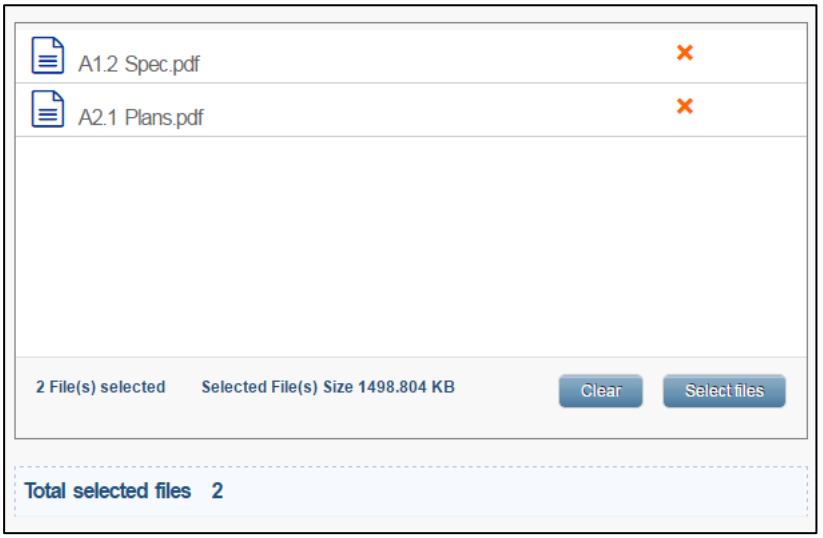
Under the **Send files to print shop** tab on the **Send files** screen, there is the **HTML 5 Upload Tool**. This is shown in the screenshot below,



Steps to select files for upload using HTML 5 Upload Tool:

- Click on **[Select Files]** button to open the *Document Selection window* to select files/images from the local computer
- Select the files/images and then click on **[Open]** button on the *Document Selection window* to attach the files in the upload tool

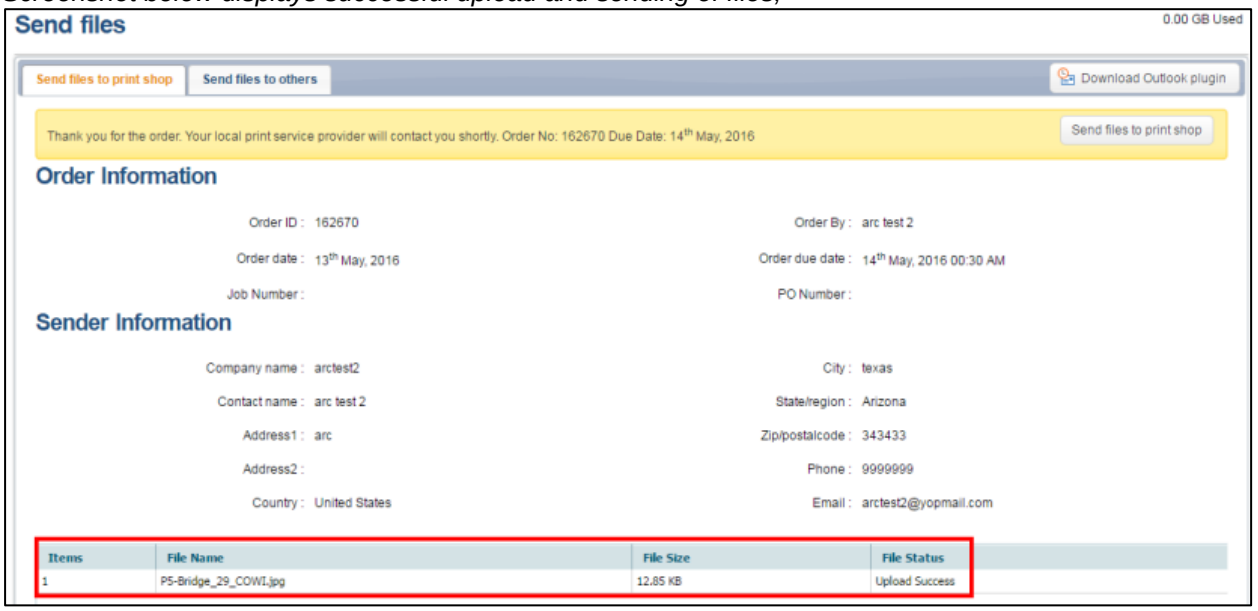
  Alternatively
  - Open any folder on the local computer, drag and then drop the selected files/images in the space provided in the upload tool on the application page
- The selected files/images will be displayed on the Upload Tool interface. The count of the selected files will also be displayed on the Upload tool interface. This is shown the screenshot below,



- Click on **[Clear]** button to remove the selected files/images

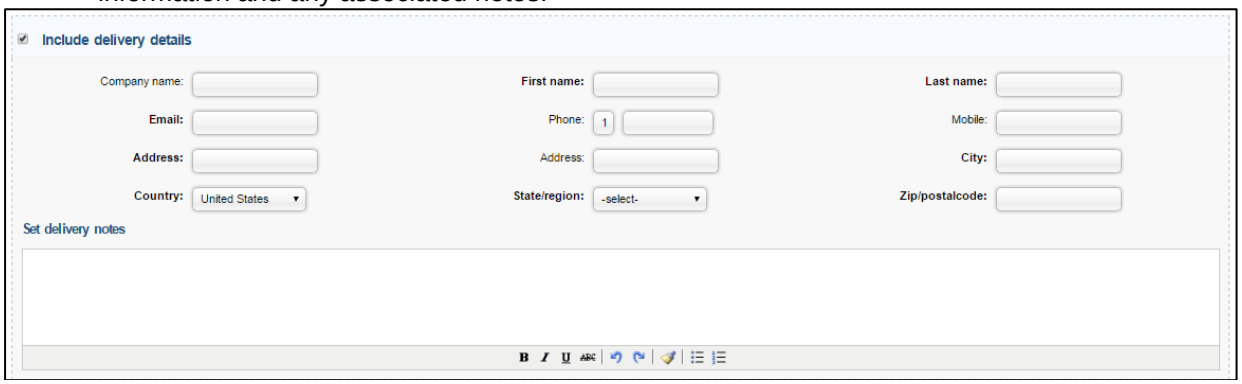
After entering the relevant information user needs to click on **[Submit]** button to upload the files and then send the files along with the print order to the print shop.

Screenshot below displays successful upload and sending of files,



Including delivery details

- Tick the checkbox **Include delivery details** to view and enter information delivery company information and any associated notes.



- In the end enter **Printing Instructions** and click **Submit** to send the documents to a print shop to be printed according to the given printing instructions

Note: Click **ishipdocs global footprints** to view ishipdocs global printing locations.

Send files to others

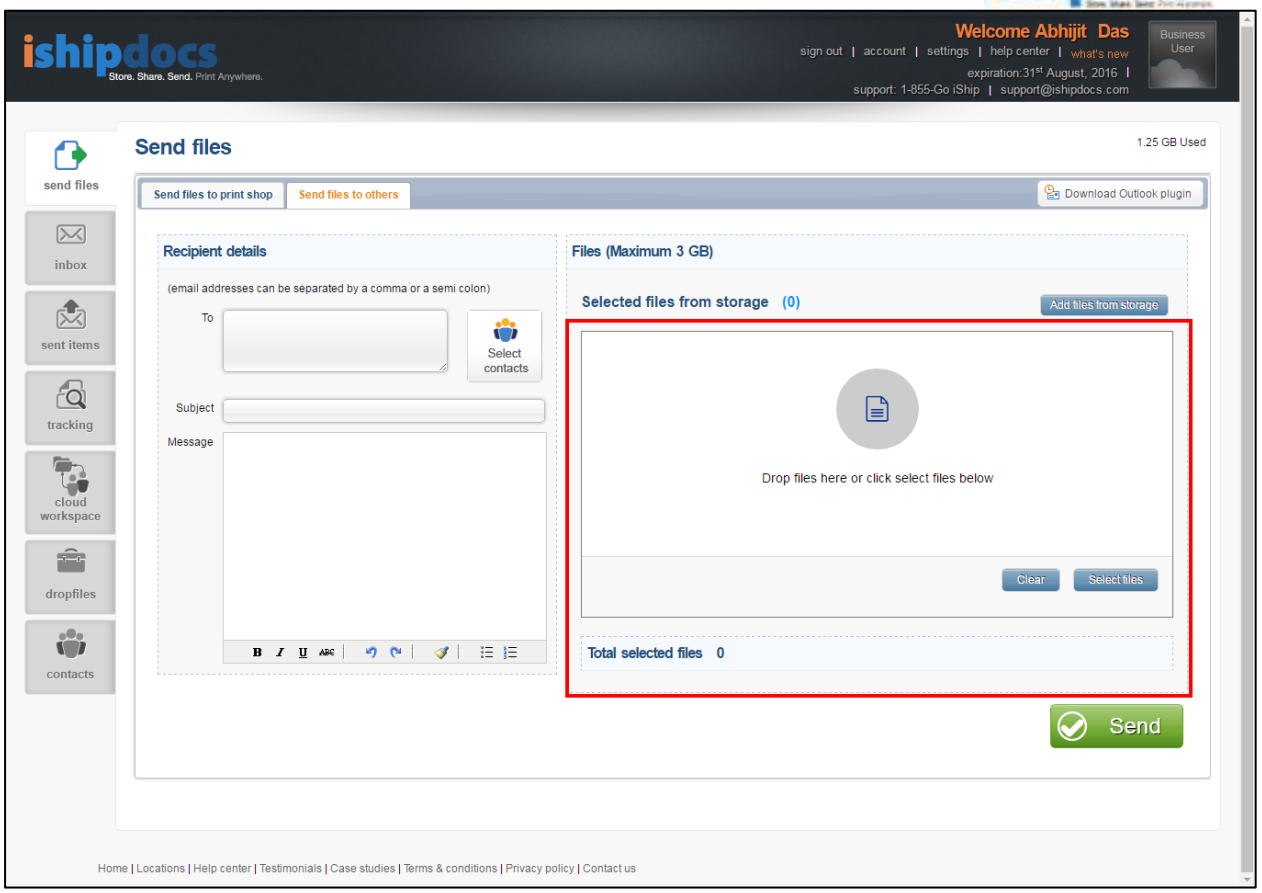
You can send files in bulk either from storage or directly uploaded files from your local system to the others (person or entity) through email from the application. In this case, the files will be send as an attachment with the email

In the **Recipient details** section enter one or more email address of recipient(s) (or select multiple email address from the Contacts section of the application), enter the **Subject** and **Message** of the email.

Note: Like, during files to print shop files can be uploaded from storage, the same can be done in this case.

Uploading Files for sending to others

Under the **Send files to others** tab on the **Send files** screen, there is the **HTML 5 Upload Tool**. This is shown in the screenshot below,



Steps to select files for upload using HTML 5 Upload Tool:

- Click on **[Select Files]** button to open the *Document Selection window* to select files/images from the local computer
- Select the files/images and then click on **[Open]** button on the *Document Selection window* to attach the files in the upload tool

  Alternatively
  - Open any folder on the local computer, drag and then drop the selected files/images in the space provided in the upload tool on the application page

The selected files/images will be displayed on the Upload Tool interface. The count of the selected files will also be displayed on the Upload tool interface.

- Click on **[Clear]** button to remove the selected files/images

After entering the relevant information user needs to click on **[Send]** button to upload the files and then send the files along with the print order to the intended recipients.

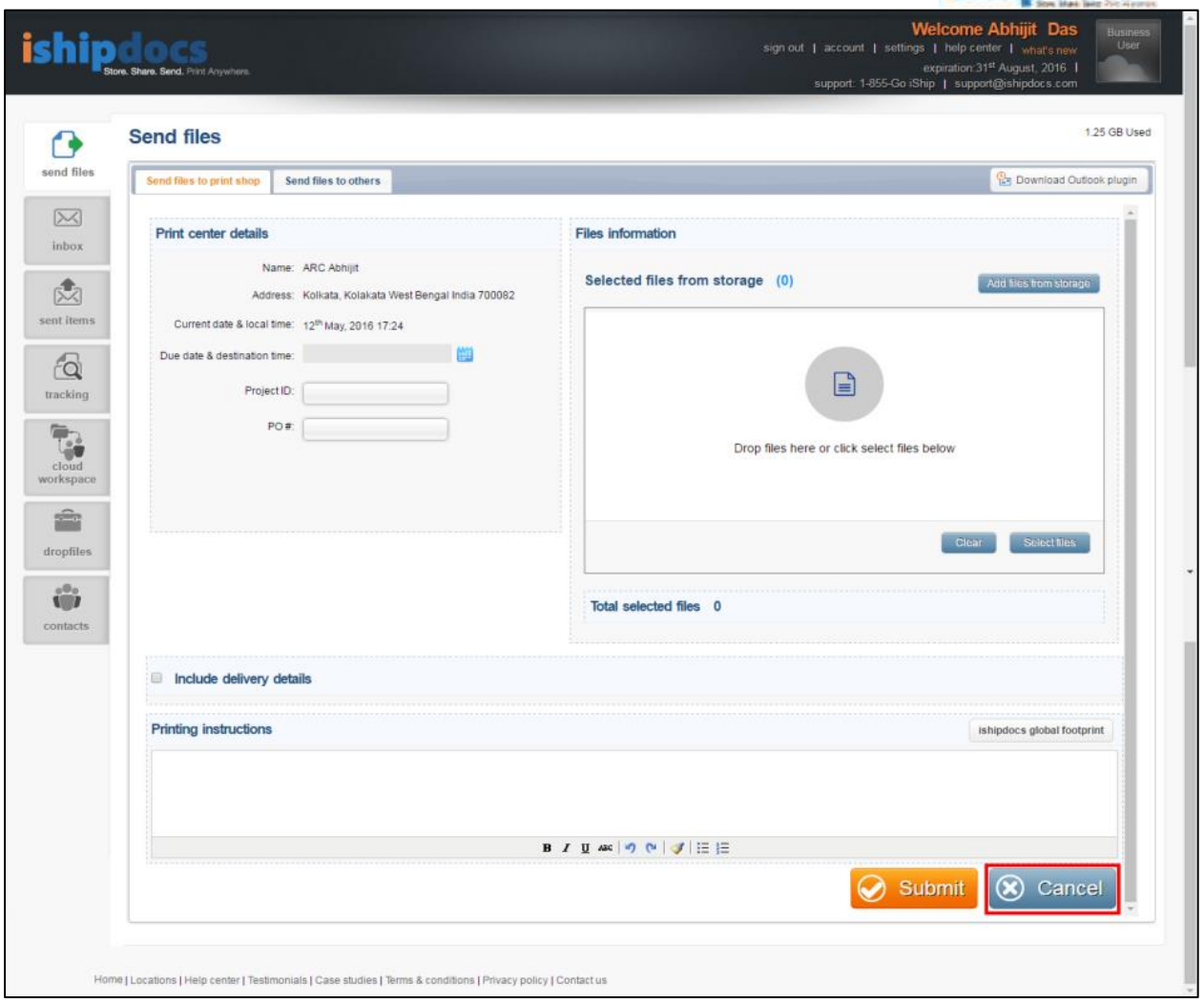
'Cancel' button

A **'Cancel'** button has been newly introduced under **Send files to print shop** tab on the **Send Files** screen. This button appears after user select files and enters all the relevant information and then clicks on the **[Submit]** button for sending the files for printing or for any other purpose.

Reasons to use Cancel button

- This button can be used to cancel transfer of files when the application displays error due to missing mandatory field data entry, wrong data entry etc. after clicking the **Submit** button
- This button can be used when user realizes after clicking **Submit** button that he/she would like to cancel file transfer

*Screenshot below displays the **Cancel** button:*



Click (**Download Outlook plugin** button) to download Outlook plugin.

How to View Inbox

You can view the details of the mails received from the Inbox menu. Follow the given procedure to view the e-mails.

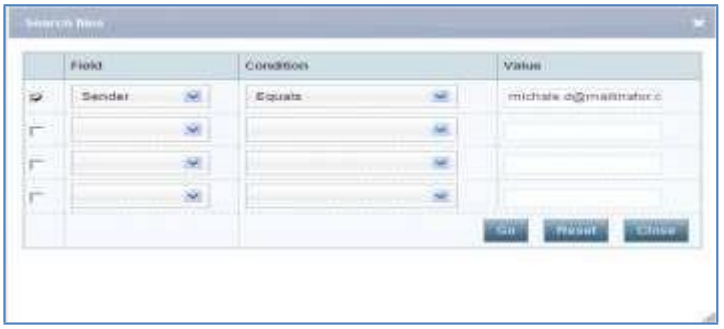
1. Click (**Inbox** icon) from the left hand panel. The **Inbox** screen appears. You can delete senders, download files, search files from this screen.

Inbox screen

2. **Searching Files**

   a) Click **Search** button from the action bar. The **Search files** window appears.

   b) From the Field drop-down list, select specific option. The options are: Tracking ID, Sender, Subject, and Date Received. As soon as the field gets selected the check box and the condition related to the field get selected automatically.



Search files window

c) Enter the value related to the field.

d) Click **Go**. All the files related to the field are displayed in the inbox list.

You may reset the fields if required.

3. **Show All**
   - Click **Show All** button from the action bar, the whole list of mails will get displayed.
4. **Downloading Files**

a) Click (**Download Files** icon) to download the file. The **Download files** window appears.

Download files window

b) Select the file(s) that you want to download. There are three options: **Download**, **Zip Download**, and **Copy to Storage**. By clicking **Download** you are allowed to select the file and download it as per your selection. **Zip Download** allows you to download all files in zip format and **Copy To Storage** allows you to copy the file to the existing storage.

Download

i. Select the file(s) that you want to download.

ii. Click (**Download** icon). The selected files will get downloaded.

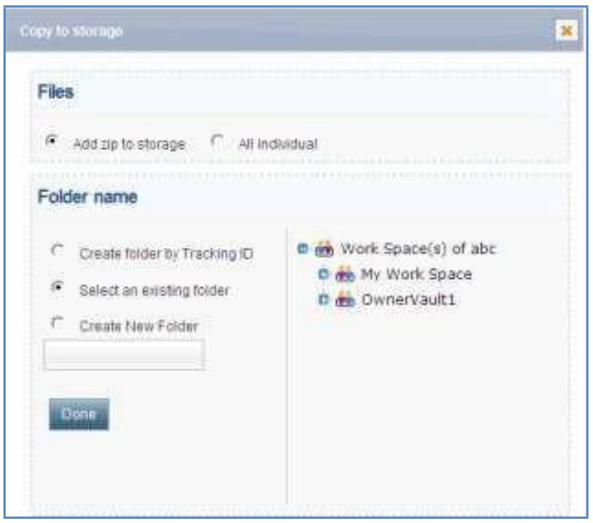
You may search the file by entering the file name and clicking **Find** button. You may also click **Show all** button to view all the files.

Zip Download

- Click **Zip Download**. All the files will get downloaded in zip format. The Non IE users can only use the Zip Download process.

Copy to Storage

i. Click **Copy To Storage**. The **Copy to storage** window appears. You can also click (**Copy to storage** icon) from the main screen. The **Copy to storage** window appears.



Copy to storage window

ii. From the **Files** section select **Add zip to storage** or **All individual**. The add zip to storage will allow you to store the zipped file and all individual option will allow to store the files individually.

iii. From the **Folder Name** section there are three options:

- **Create folder by Tracking ID:** You may create folder in the right hand panel by selecting a cabinet or a folder. Click **Done** and the files will get included within the selected cabinet or the folder.
- **Select an existing folder:** In this case you may select an existing folder from the right hand panel and click **Done**. The files will get included in the selected folder.
- **Other:** Here you may create a folder and name it in the text box below and click **Done**. The folder will be created and the files will get included in that folder.

After the file(s) get included in the storage a confirmation message appears and if the storage limit exceeds a warning message appears.

5. **Deleting Senders**

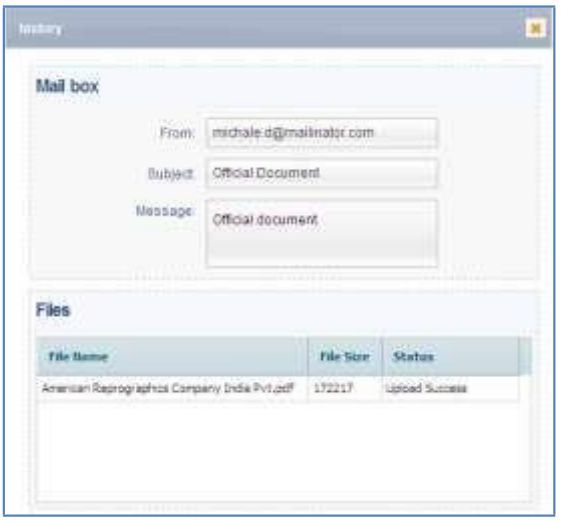
a) Select the sender from the list.

b) Click **Delete** button from the action bar. The selected sender(s) gets deleted from the list.

6. **Searching Files through Tracking Id**

a) Select the file that you want to view through tracking id.

b) Click **Tracking Id**. The history window appears. You can view the detail of the file in the screen.



history window

How to View Sent Items

You can view the details of the sent items from the sent items menu. Follow the given procedure to view the details of the sent items.

1. Click (**sent items** icon) from the left hand panel under the Toolbox. The **Sent items** screen appears. You can delete the items, display all the files, and search files from this screen.

Sent items screen

2. **Re-upload**

   e) If in any case the upload is not completed, you can re-upload the file by clicking the **Re-upload** button.

   f) Select the recipient whose file is not uploaded. The **Re-upload** button will get enabled.

   g) Click the **Re-upload** button, the **Re-upload** screen appears.

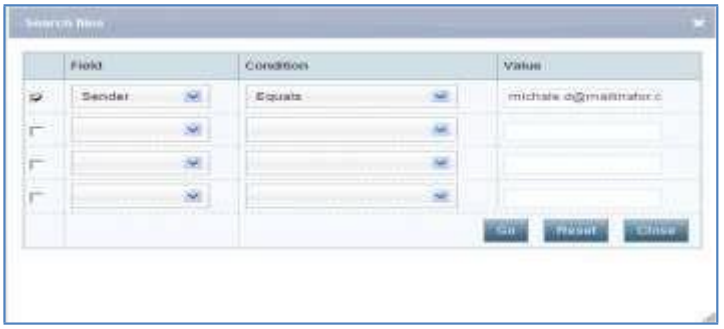
Re-upload screen

h) Select the files that you want to upload and click the **Submit** button. The uploading files screen appears as shown.

Uploading files screen

3. **Searching Files**

a) Click **Search** button from the action bar. The **Search files** window appears.



Search files

b) From the Field drop-down list, select the specific option. The options are: **Recipient**, **Subject**, and **Date Sent**. As soon as the field is selected the check box adjacent to the field and the condition get selected automatically. You may change the condition as per your requirement.

c) Enter the value related to the field.

d) Click **Go**. All the files related to the field are displayed in the inbox list.

You may reset the fields if required.

4. **Show All**
   - Click **Show All** button from the action bar, the whole list of the sent items get displayed.
5. **Deleting Items**

a) Select the check box adjacent to the recipient name from the list.

b) Click the **Delete** button from the action bar. The selected item(s) gets deleted from the list

6. **Viewing Files through Tracking Id**

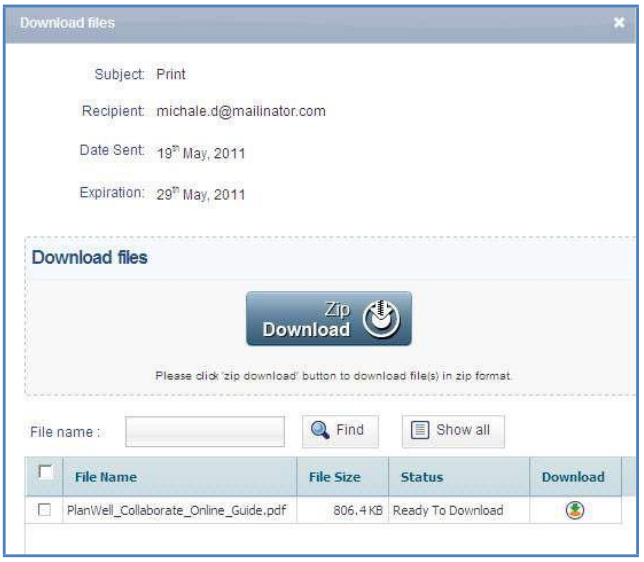
a) Select the file that you want to view through tracking id.

b) Click **Tracking Id**. The **history** window appears. You can view the detail of the file in the screen.

History window

7. **Downloading Files**

a) Select the recipient whose file you want to download. Click (**Download Files** icon) to download the file. The **Download files** window appears.



Download files

b) Select the file(s) that you want to download. There are three options: **Download**, **Zip Download**, and **Copy to Storage**. By clicking **Download** you are allowed to select the file and download it as per your selection. **Zip Download** allows you to download all files in zip format and **Copy to storage** allows you to copy the file to the existing storage.

Download

i. Select the file(s) that you want to download.

ii. Click (**Download** icon). The selected files will get downloaded.

You may search the file by entering the file name and clicking **Find** button. You may also click **Show all** button to view all the files.

Zip Download

- Click **Zip Download**. All the files will get downloaded in zip format. The Non IE users can only use the Zip Download process.

Copy to Storage

i. Click **Copy To Storage**. The **Copy to storage** window appears. You can also click (**Copy to storage** icon) from the main screen. The **Copy to storage** window appears.

Copy to storage window

ii. From the **Files** section select **Add zip to storage** or **All individual**. The add zip to storage will allow you to store the zipped file and all individual option will allow to store the files individually.

iii. From the **Folder Name** section there are three options:

- **Create folder by Tracking ID:** You may create folder on the right hand panel by selecting a cabinet or a folder. Click **Done** and the files will get included within the selected cabinet or the folder.
- **Select an existing folder:** In this case you may select an existing folder from the right hand panel and click **Done**. The files will get included in the selected folder.
- **Other:** Here you may create a folder and name it in the text box below and click **Done**. The folder will be created and the files will get included in that folder.

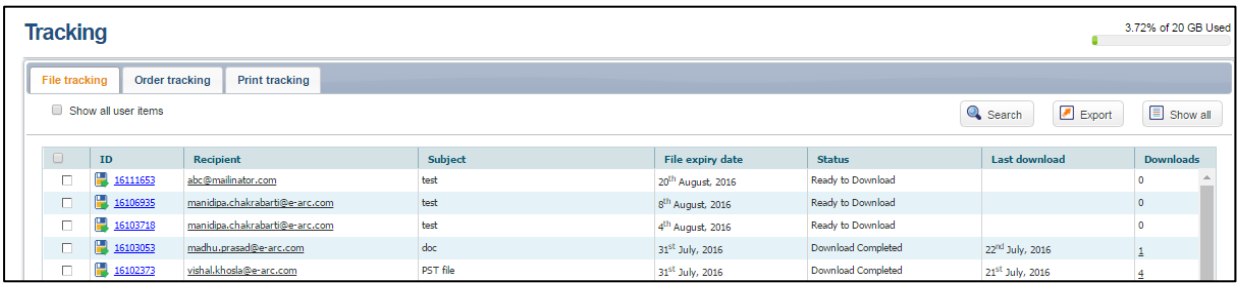
After the file(s) get included in the storage a confirmation message appears and if the storage limit exceeds a warning message appears.

How to track files

You can track files at the same time you can track print documents through this module.

Follow the given procedure to track files.

1. Click (**Tracking** icon) from the left hand panel. The **Tracking** screen appears. You can track files as well as print the tracked file through this module.



2. **File Tracking**

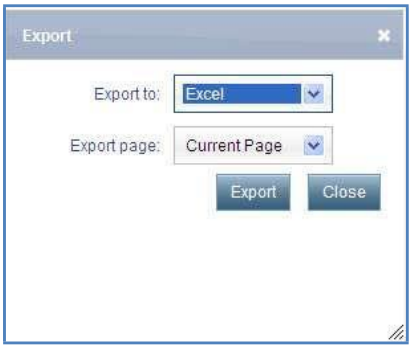
   a) **Searching Files**

      i. Enter the tracking id of the file that you want to search in the **Tracking ID#** text box. You can also select the **Recipient** option and track files accordingly.

      ii. Click the **Search** button from the action bar. The specific file will be displayed in the grid section. You can see the status of the file, the recipient's name, the expiry date everything related to the file.

   b) **Exporting the lists**

      i. Click the **Export** button from the action bar. The **Export** window appears.



Export window

ii. Select your preference from the **Export to** drop-down list. The options are **Excel**, **CSV**, and **XML**.

iii. Select the page you want to export from the **Export page** drop-down list. You may select **Current Page** or **All Pages**.

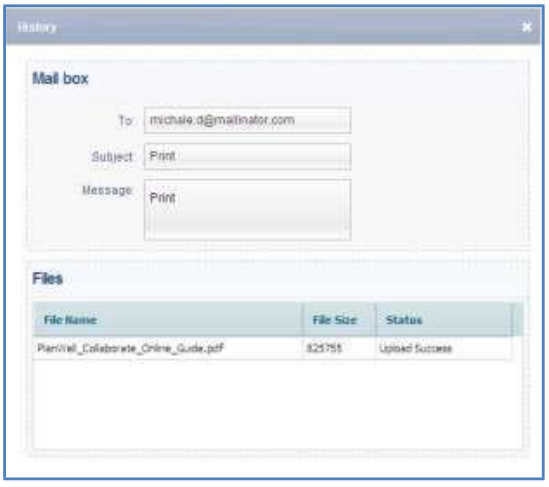
c) **Show All**

- Click the **Show All** button from the action bar, the entire list of the files with the tracking id are displayed in the grid section.

d) **History screen**

i. Select the file that you want to view through tracking id.

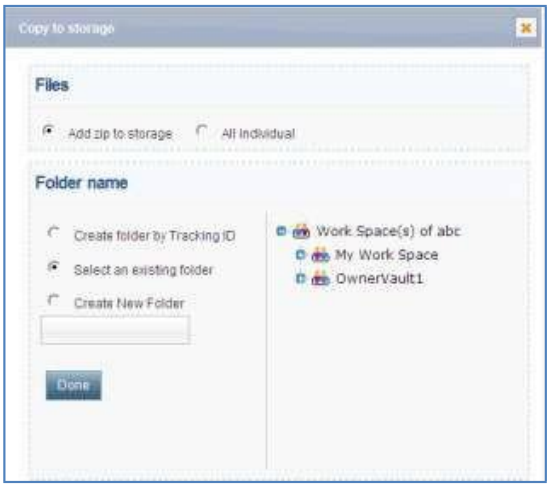
ii. Click **Tracking Id**. The **history** window appears. You can view the detail of the file in the screen.



History window

e) **Copying To Storage**

i. Click (**Copy to storage** icon). The **Copy to storage** window appears.



Copy to storage window

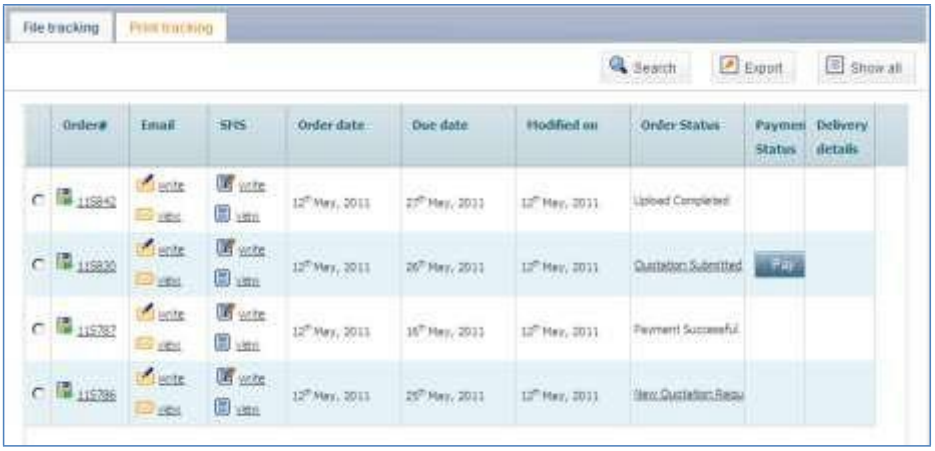
ii. From the Files section select **Add zip to storage** or **All individual**. The add zip to storage will allow you to store the zipped file and all individual option will allow to store the files individually.

iii. From the **Folder Name** section there are three options:

- **Create folder by Tracking ID:** You may create folder in the right hand panel by selecting a cabinet or a folder. Click **Done** and the files will get included within the selected cabinet or the folder.
- **Select an existing folder:** In this case you may select an existing folder from the right hand panel and click **Done**. The files will get included in the selected folder.
- **Create New Folder:** Here you may create a folder and name it in the text box below and click **Done**. The folder will be created and the files will get included in that folder.

After the file(s) get included in the storage a confirmation message appears and if the storage limit exceeds a warning message appears.

3. **Print Tracking**
   - Click **Print Tracking** tab, the **Print tracking** screen appears.



Print tracking screen

f) **Searching Files**

i. Click **Search** button from the action bar. The **Search orders** window appears.

Search orders window

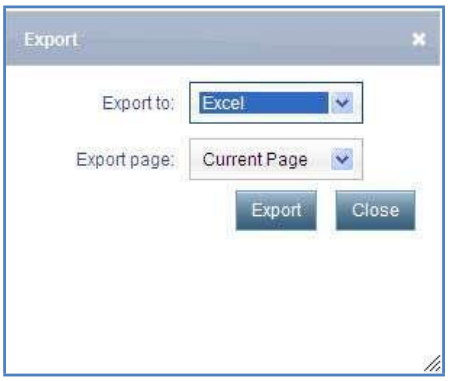
ii. Select the field from the Field drop-down list. The options are: **Order #**, **Order date**, **Due date**, **Modified on**, and **Status**. As soon as the field gets selected the check box and the condition related to the field get selected automatically. You may change the condition as per your requirement.

iii. Enter the value related to the field.

iv. Click **Go**. All the files related to the field are displayed in the Print Tracking grid section. You can see the status of the file, the recipient's name, the order date, the due date, the modification date, the status and the delivery details everything related to the files.

g) **Exporting the lists**

i. Click the **Export** button from the action bar. The **Export orders** window appears.



Export window

ii. Select your preference from the **Export to** drop-down list. The options are **Excel**, **CSV**, and **XML**.

iii. Select the page you want to export from the **Export page** drop-down list. You may select **Current Page** or **All Pages**.

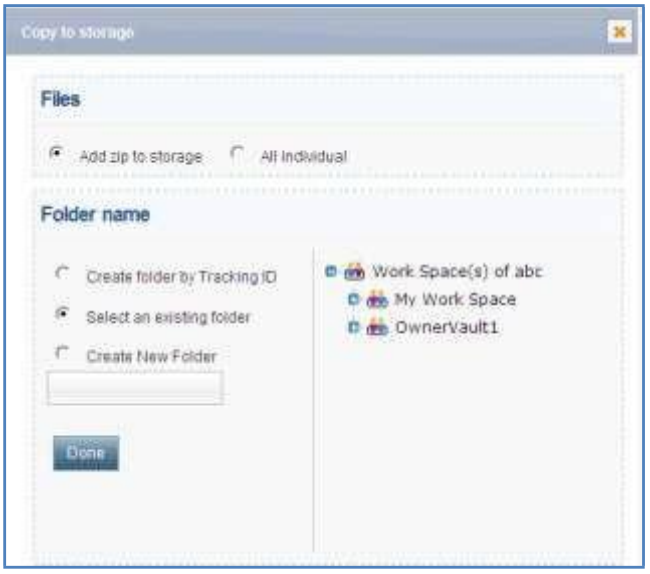
iv. Click **Export**. The page(s) gets exported.

h) **Show All**

- Click the **Show all** button from the action bar, the entire list of the files with the Order Id are displayed in the Print Tracking list.

i) **Copying to Storage**

i. Click (**Copy to storage** icon). The **Copy to storage** window appears.



Copy to storage window

ii. From the **Files** section select **Add zip to storage** or **All individual**. The add zip to storage will allow you to store the zipped file and all individual option will allow to store the files individually.

iii. From the **Folder Name** section there are three options:

- **Create folder by Tracking ID:** You may create folder in the right hand panel by selecting a cabinet or a folder. Click **Done** and the files will get included within the selected cabinet or the folder.
- **Select an existing folder:** In this case you may select an existing folder from the right hand panel and click **Done**. The files will get included in the selected folder.
- **Other:** Here you may create a folder and name it in the text box below and click **Done**. The folder will be created and the files will get included in that folder.

j) **Sending Email**

i. Click **write** adjacent to for which tracking id you want to send an email. The **Write Email** window appears.

Write Email

ii. Enter the mail id of the person whom you want to send an email in the **To** text box. You may enter ids in **CC** and **BCC** text boxes as well.

iii. Subject will come automatically. You may change the subject if required.

iv. Enter the message in the **Message** text box.

v. Click **Send**.

vi. Click **Close** after sending the email. The window will close automatically. You may also print the email by clicking the **Print** button.

k) **Sending SMS**

i. Click **write** adjacent to for which tracking id you want to send a SMS. The **Write SMS** window appears.

Write SMS window

ii. Enter the phone number whom you want to send a SMS in the **To** text box.

iii. **Subject** will come automatically. You may change the subject if required, but you have to keep in mind number of characters allowing for SMS is 70 only.

iv. Enter the message in the **Message** text box.

v. Click **Send**.

vi. Click **Close** after sending the SMS. The window will close automatically. You may also print the SMS by clicking the **Print** button.

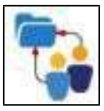
You can track the order by viewing the status of the order and when the delivery completes (**Delivery info** icon) appears for the particular order. Click (**Delivery info** icon). You will get the delivery information from the Delivery Information Details window.

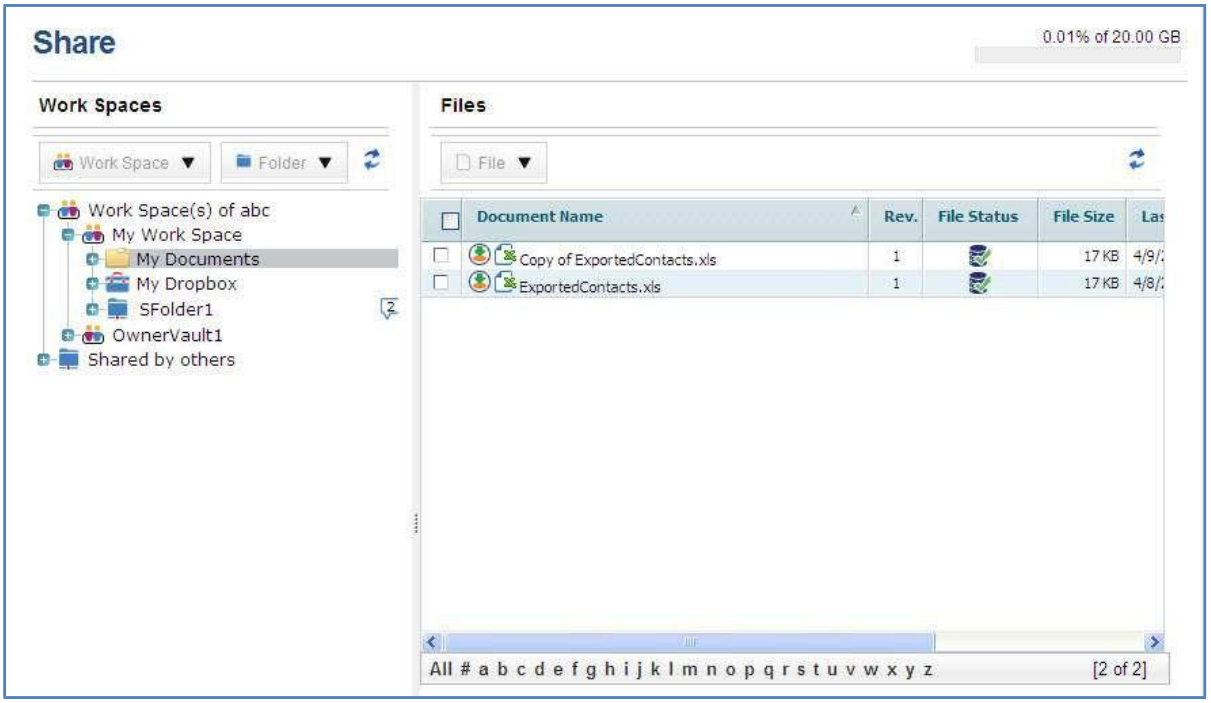
Note: Another tab **'Order Tracking'** is similar to **'Print Tracking'** but it shows tracks of customer print orders from a PSP whereas personally logged-in user print orders are displayed under the 'Print Tracking' tab.

How to share files

From this module you can able to store files in different folder. You can create your own folder or you can keep the files in the existing folders as per your requirement.

Follow the given procedure to store your files.

Click  (**Share** icon) from the left hand panel. The **Share** screen appears.



Share screen

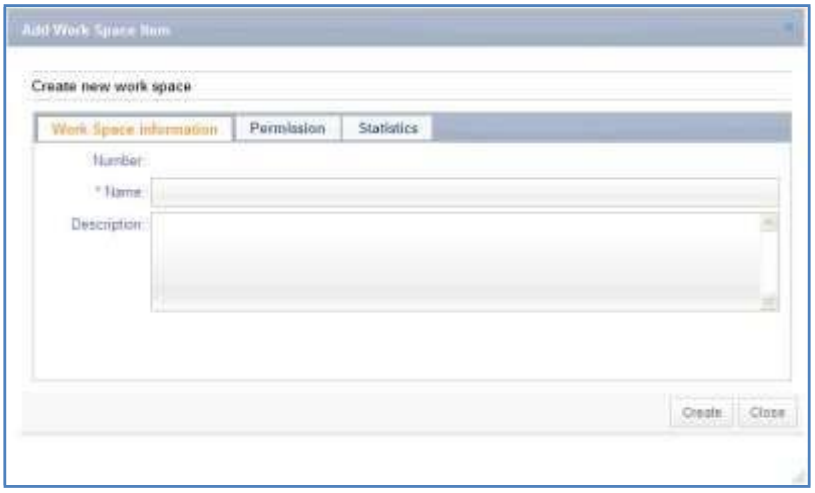
Workspace

Adding Workspace

1. Place the cursor in the downward arrow of

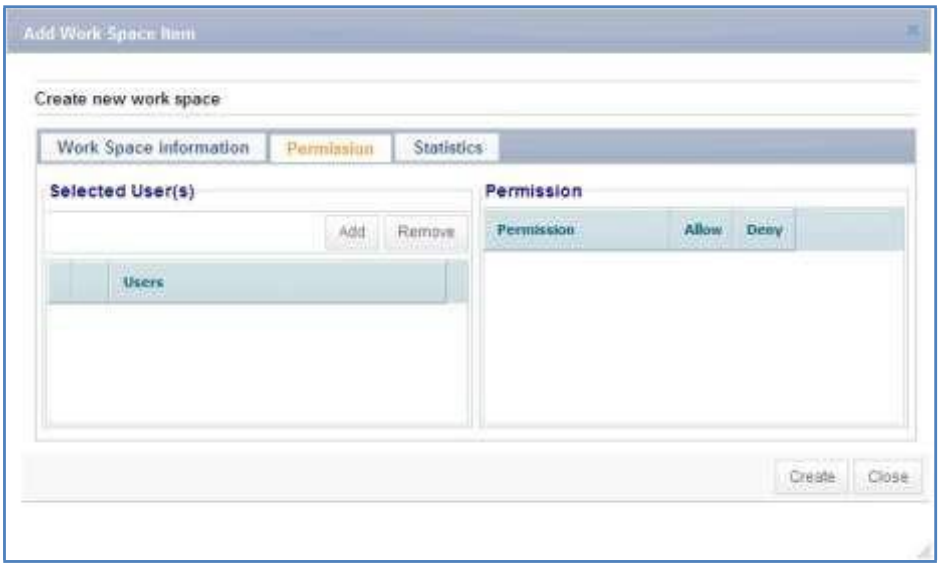
. Three options will appear in the drop-down list: Add/Edit work space, Remove work space and Set alert.

2. Select (**Add/Edit work space** icon). Make sure that the **Work Space(s) of some company name** is selected at the time you want to add another work space. The **Add/Edit Work Space Item** window pops up. The window has three tabs: **Work space Information**, **Permission**, and **Statistics**. The Work space information tab is displayed by default.



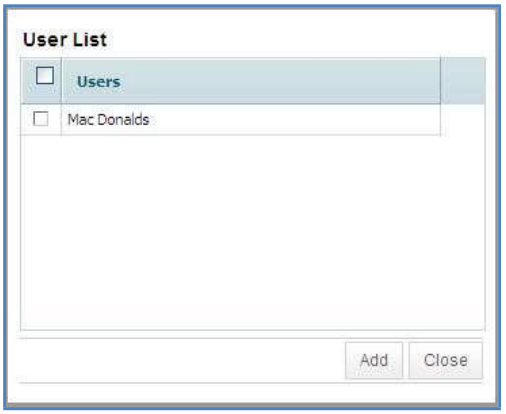
Add Work Space Item

3. In the **Work space Information** tab:
   a) Enter the name of the work space in the **Name** text box. This field is mandatory.
   b) Enter the work space description if required in the **Description** text area.
   c) Click **Create**. The confirmation message appears.
4. Click the **Permission** tab, the **Permission** screen appears. You can give permission to specific users who have availed the seats.



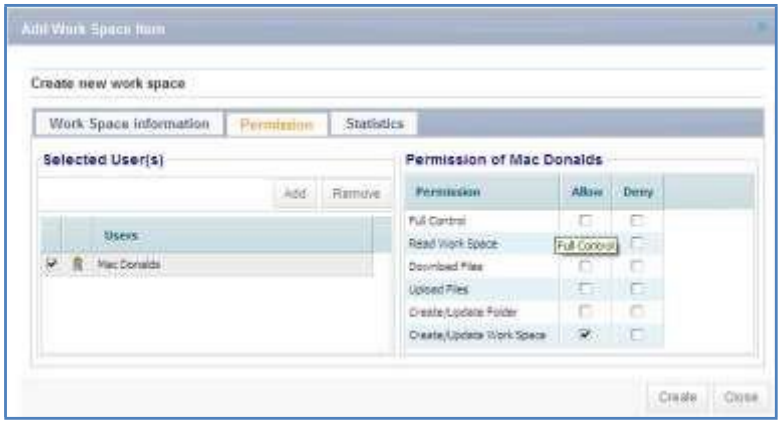
Permission screen

5. To select the user(s)/user role(s), click **Add**, the **User List** appears.



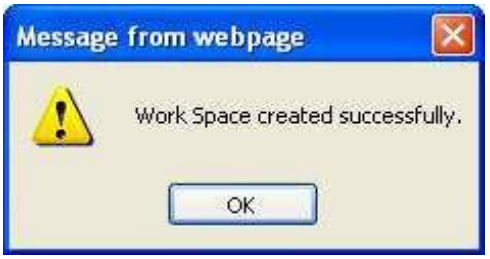
User List

6. Select the users from the drop-down list. The **User/User Roles** list appears.
7. Select the user and click **Add**. The **Permission** screen pops up.



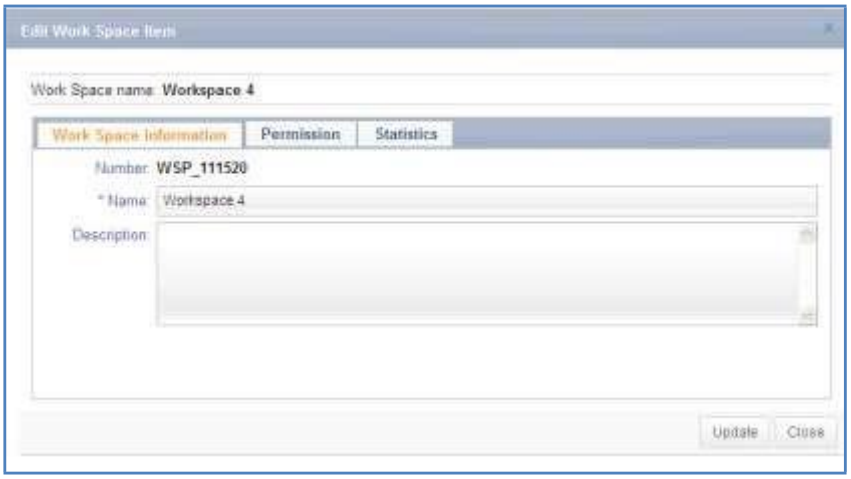
Permission tab

8. Select the type of permission you want to provide to the users from the right hand panel.
9. Click **Create**. The confirmation message appears.



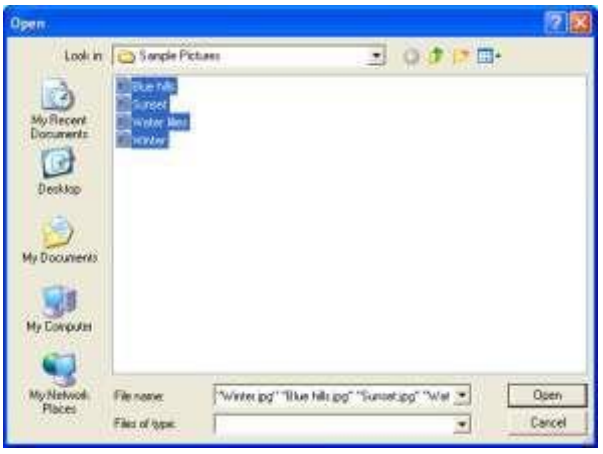
Confirmation message

10. Click **OK**. The number is created automatically.

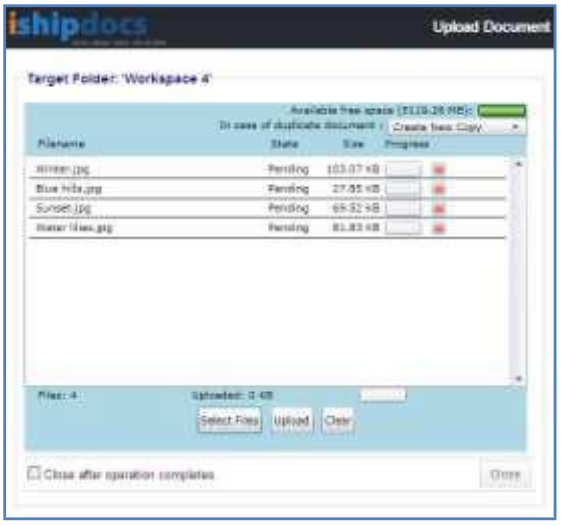


Number created in Edit Work Space Item

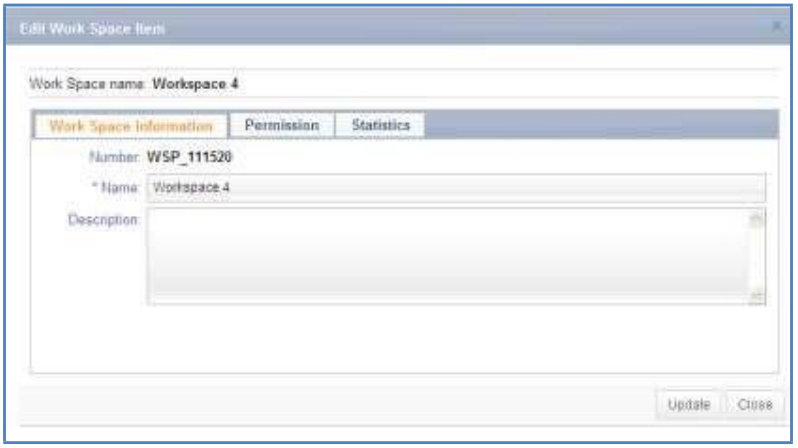
11. Click **Close** to close the window.
12. Select the workspace that you have created to upload files.
13. Click **Add/Upload files**. The **Upload Document** window appears.
14. Click **Select Files**. The **Open** dialog box appears.



15. Select the file that you want to upload from the particular location.
16. Click **Open**. The files get inserted in the **Upload Document** window.

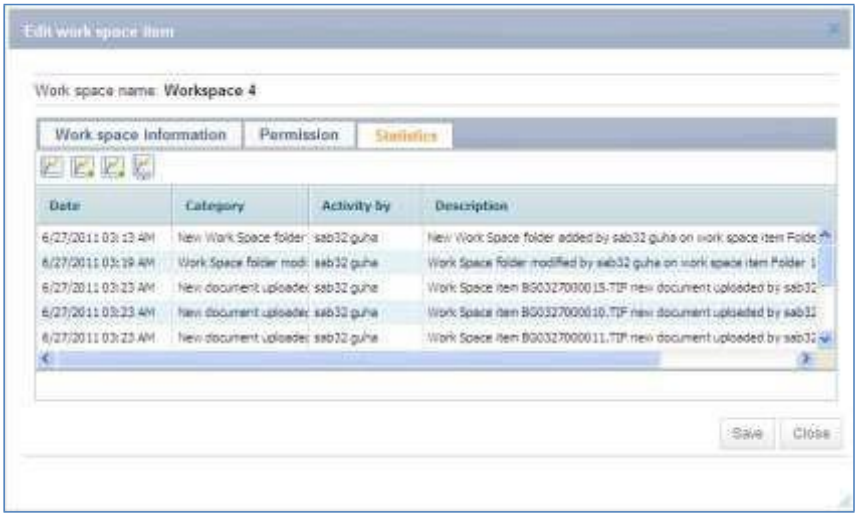


17. Click **Upload**. The files get uploaded in the workspace or the folder that you have selected.
18. Click **Close** to close the screen.
19. Click **Add/Edit Work Space**.
20. If you click **Add/Edit Work Space**, the **Edit Work Space Item** screen appears as shown.



Edit Work Space Item screen

21. Click **Statistics**. All the operational occurrences will be displayed as shown.



Statistics tab

22. Click **Close** to close the screen.

Removing Work space

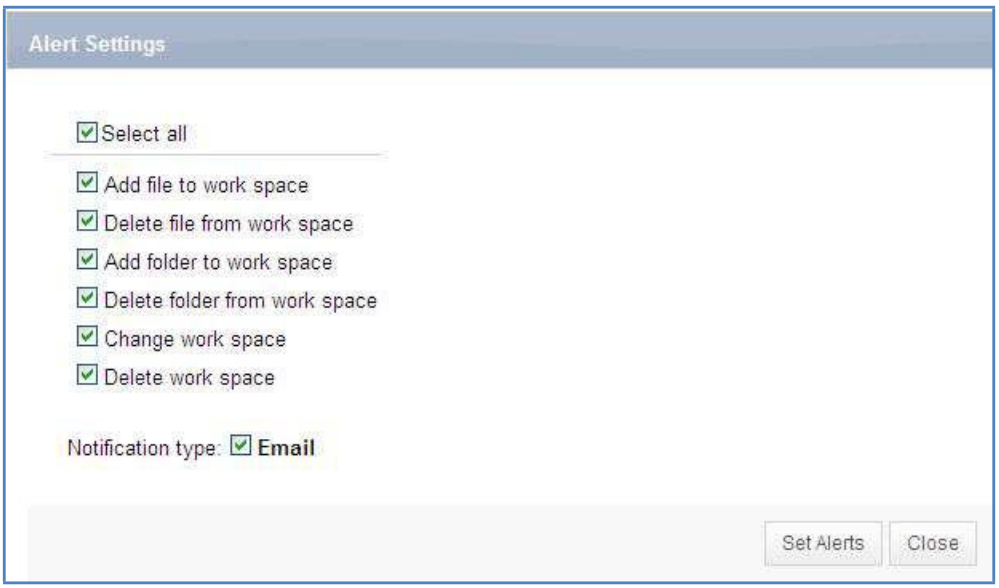
1. Select the work space you want to remove and place the cursor in the downward arrow of

.
2. Click the second icon (**Remove work space** icon). A warning message appears.
3. If you are confirmed that you want to delete the work space then click **OK**. The confirmation message appears stating "Selected work space deleted successfully".
4. Click **OK** and the selected work space gets deleted from the tree.

Setting Alerts

1. Select the work space for which you want to set alert.
2. Place the cursor in the downward arrow of

.
3. Click the third icon (**Set alert** icon). The **Alert Settings** window popped up. There are lots of options.



Alert Settings window

4. For setting notification for the file(s), select the appropriate options or you can select the options altogether by selecting **Select All** option. The **File Alert Subscription** section consists of the following options:
   - **Add file to work space:** If you select this check box, any file added to workspace will be notified.
   - **Delete file from work space:** If you select this check box, any file gets deleted from the workspace will be notified to other members.
   - **Add folder to work space:** If you select t this check box, any folder gets added to workspace will be notified to other members.
   - **Delete folder from work space:** if you select this check box, any folder gets deleted from the workspace will be notified to other members.

- **Change work space:** If you select this check box, any change in work space will be notified to other members.
- **Delete work space:** If you select this check box, any work space gets deleted from the list will be notified to the members.

5. Select **e-mail** as a mode of notification.
6. Click **Set Alerts** to set the notification alert as per your selection. The confirmation message appears to confirm successful settings.
7. Click **OK**.
8. Click **Close** to exit from the **Alert Settings** window.
9. If you want to set alert for all the options directly select **Select All** check box. All the options get selected automatically. You can also select individual options as per your requirement.
10. Select **Email** in the **Notification Alert Type**.
11. Click **Set Alerts**. The confirmation message appears.
12. Click **OK**.
13. Click **Close** to close the window.

Folders

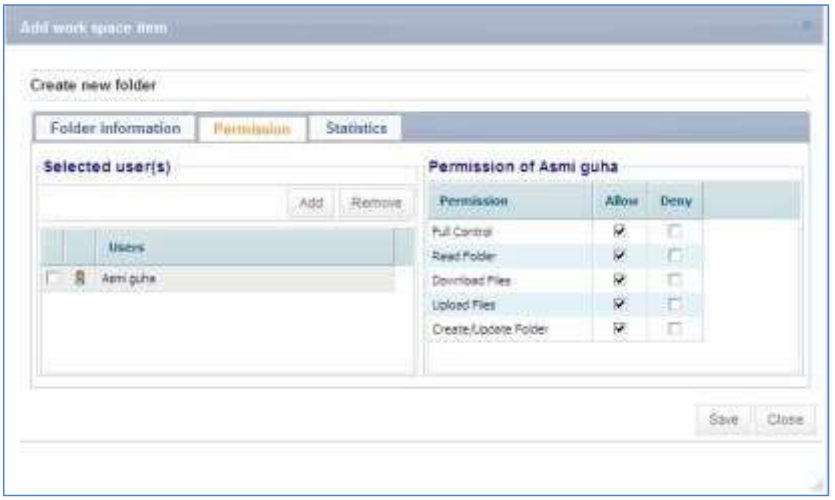
Adding Folders

1. Select the folder or work space where you want to add another folder.
2. Click the downward arrow of

. Many options will appear.
3. Click the first option (**Add Folder** icon). The **Add Work Space Item** window pops up. The window has two tabs: **Folder information** and **Statistics**. The Folder information is displayed by default.

Add Work Space Item

4. Enter the folder name in the **Folder Name** text box.
5. Click the **Permission** tab, the **Permission** screen appears. You can give permission to specific users who have availed the seats just like the Workspace section.
6. To select the user(s)/user role(s), click **Add**, the **User List** appears.
7. Select the users from the drop-down list. The **User/User Roles** list appears.
8. Select the user and click **Add**. The **Permission** screen pops up.
9. Select the type of permission you want to provide to the users from the right hand panel.



Add Work space item screen

10. Click **Save**. The confirmation message appears.

Confirmation message

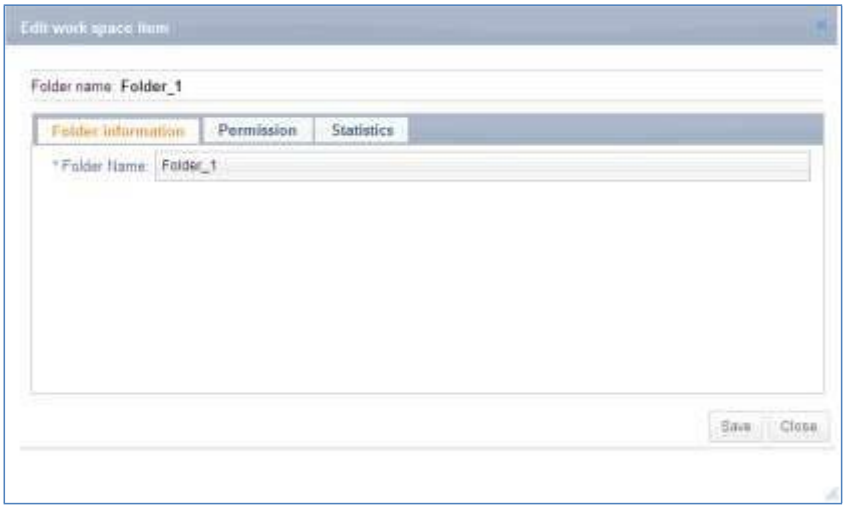
11. Click **OK**. The folder will be created.
12. Click **Add/Upload** from the **Files** drop-down list. The **Upload Document** window appears.
13. Click **Select Files**. The **Open** dialog box appears.
14. Select the file(s) that you want to upload from a particular location.
15. Click **Open**. The file(s) get selected in the **Upload Document** window.
16. Click **Upload**. The file(s) get uploaded in the **Files** section in the right hand panel.
17. Click **Close** to close the window.

Editing Folder

1. Select the folder or vault that you want to modify.
2. Click the downward arrow of

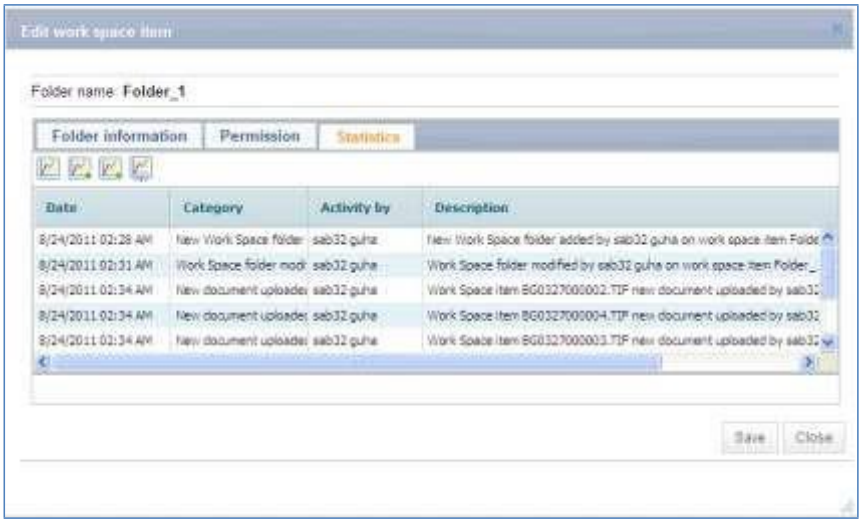
. Different options will appear.

3. Click the second option (**Edit Folder** icon). The **Edit Work Space Item** window pops up.



Edit Work Space Item window

4. Modify the information in the **Folder information**.
5. You may add or remove permission from the **Permission** tab.
6. Click **Statistics** tab. All the operational activities are displayed in the **Statistics** tab as shown.



Statistics tab

7. Click **Save**. A confirmation message appears and the folder gets updated successfully.

Confirmation message

8. Click **OK** and click **Close** from the main window.

Deleting Folder

1. Select the folder that you want to delete.
2. Click the downward arrow of

. Different options will appear.
3. Click the third option (**Delete Folder** icon). A warning message pops up asking whether you are sure that you want to delete the folder.
4. Click **OK**, if you really want to delete the folder. Your folder gets deleted from the list.

Setting Alert

1. Select the folder for which you want to set the alert.
2. Click the downward arrow of

. Different options will appear.
3. Click the fourth option (**Set Alert** icon). The **Alert Setting** window pops up. There are lots of options.

Alert Setting window

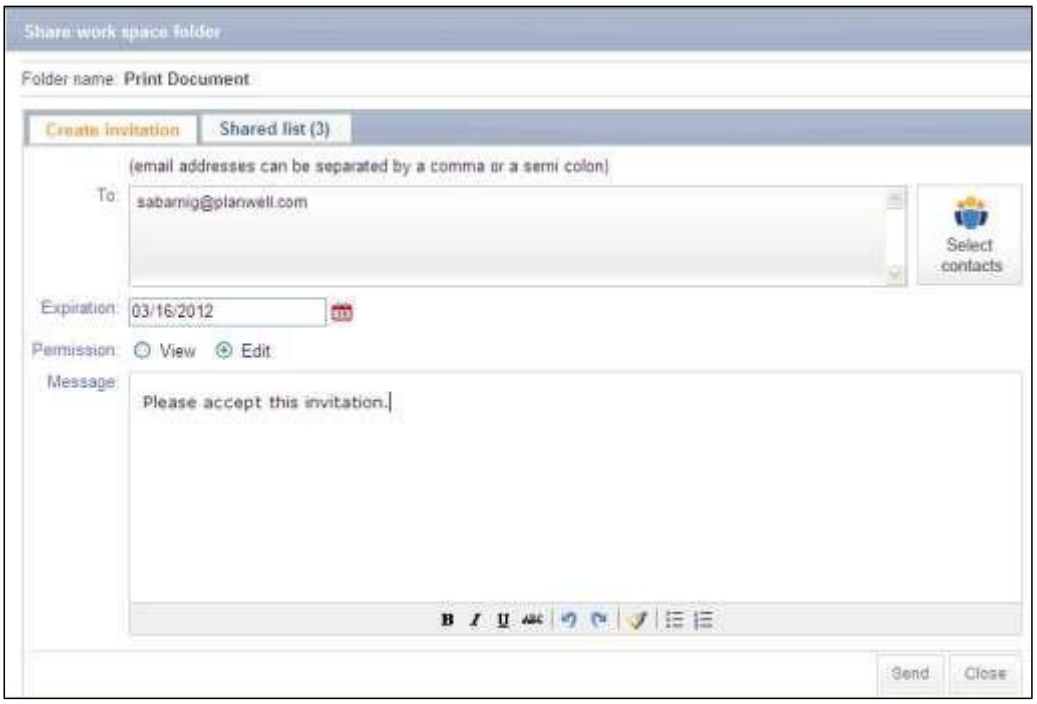
4. For setting notification for the file(s), select the appropriate options or you can select the options altogether by selecting **Select All** check box. The **File Alert Subscription** section consists of the following options:
   - **Add file to folder:** If you select this check box, any file added to folder will be notified.
   - **Delete file from folder:** If you select this check box, any file gets deleted from the folder will be notified to other members.
   - **Add folder:** If you select t this check box, any folder gets added will be notified to other members.
   - **Delete folder:** If you select this check box, any folder gets deleted will be notified to other members.
   - **Change folder:** If you select this option, any change in folder will be notified to other members.
   - **Sharing folder with another user:** If you select this check box, any folder shared with another user will be notified to other members.
   - **Folder sharing revoked from another user:** If you select this check box, any folder sharing cancelled or withdrawn from someone will be notified to other members.
5. Select **e-mail** as a mode of notification.
6. Click **Set Alerts** to set the notification alert as per your selection. The confirmation message appears to confirm successful settings.
7. Click **OK**.

8. Click **Close** to exit from the **Alert Settings** window.

Sharing Folder

1. Select the folder that you want to share.
2. Click the downward arrow of

. Different options will appear.
3. Click the fifth option (**Share Folder** icon). The **Share Work Space Folder** window pops up. The folder name section displayed the folder name that you want to share.

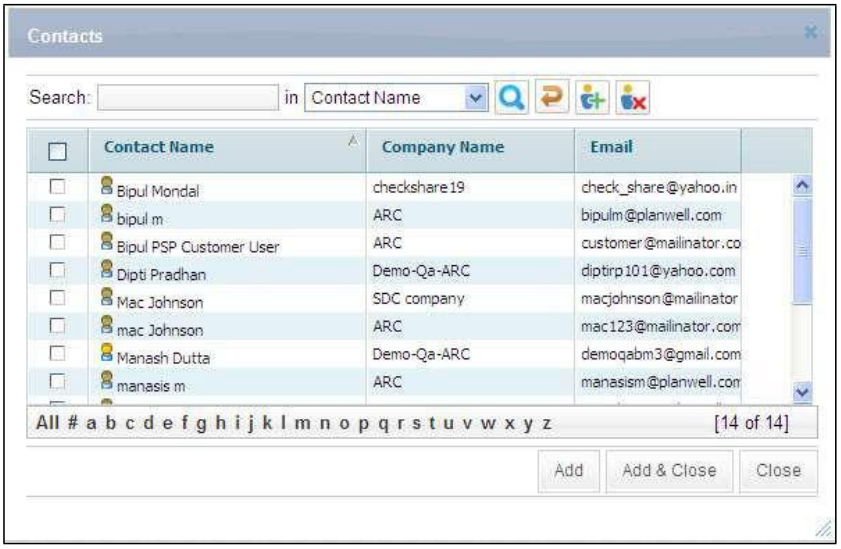


Share Work Space Folder window

4. The window has two tabs: Create invitation and Shared list. The **Create invitation** screen is displayed by default.
5. **Create invitation:**

   a) Enter the email address of the person whom you want to share. You can share folders with the same account users as well. To do so, enter the email id of the account user in the **To** text box of the **Create invitation** screen.

   b) If you want to share the folder with the existing contacts, click the **Select Contacts** button adjacent to the **To** text box. The **Contacts** screen will appear. It displays the list of existing contacts.



Contacts screen

i. Select the specific contact(s) from the list whom you want to share the folder.

ii. Click **Add & Close** or click **Add** and **Close** separately to close the window.

You can search specific contact, add new contacts and delete existing contacts from the list by clicking (**Search** icon), (**Add New Contact** icon) and (**Delete Contact** icon) respectively. Click (**Reset** icon) to reset the contacts. To know more about Adding New Contact please go through How To Manage Contacts.

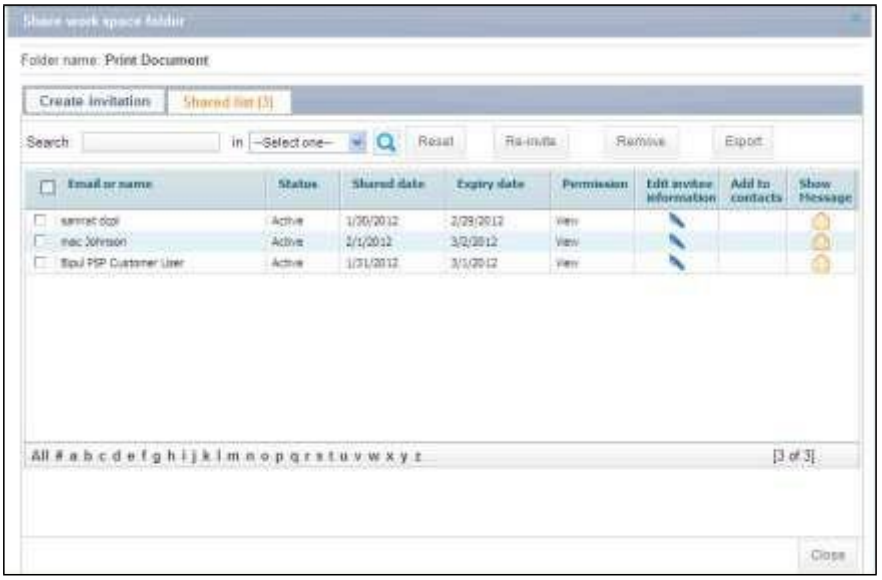
c) To select the expiration date, click (Calendar icon). The calendar will be displayed, select the date from the calendar.

d) Select the **View** option or the **Edit** option from the **Permission** field. The view option will allow the selected contacts to view and download the shared files within the folder and the edit option will allow the selected contacts to add/upload the files within the folder and delete the files uploaded by the user.

e) Write down a message in the **Message** text field.

6. **Shared list**

a) Click the **Shared list** tab. The **Shared list** screen appears. The shared list displays the list of invitees to whom you have already sent invitation to view or modify the folder.



Shared list screen

b) To search the contact from the shared list, enter the search string in the **Search** text box**,** select the search criteria from the **in** drop-down list and click (**Search** icon). The particular contact will be displayed in the grid section. Clicking **Reset** button will erase the search string from the **Search** text box.

c) To re-invite any contact(s) from the shared list, select the invitee(s) and click the **Re-invite** button. The invitation will be again sent to the specific invitee(s) and a confirmation message will be displayed after successful invitation.

d) To remove invitee(s) from the Shared list, select the invitee(s) and click the **Remove** button. The selected invitee(s) will be removed from the shared list and a confirmation message will be displayed after successful deletion.

e) To export the existing invitee list, click the **Export** button. The **Export invitee** list window appears.

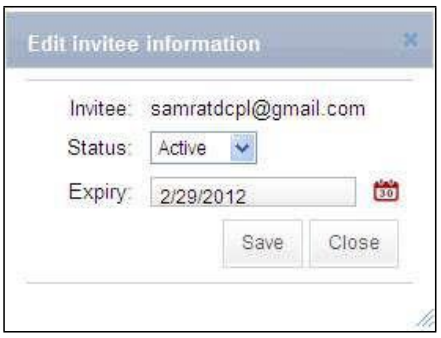
Export invitee list window

i. Select the file format in which you want to export the invitee list from the **Format** drop-down list.

ii. Click the **Export** button. The list of invitees will be exported in the selected format.

iii. Click the **Close** button to close the window.

f) To modify the existing invitee, click (**Edit invitee information** icon). The **Edit invitee information** window pops up.



Edit invitee information window

i. Select the status of the invitee from the **Status** drop-down list. There are two options: **Active** and **Inactive**.

ii. To select the expiry date, click (Calendar icon). The calendar will be displayed, select the date from the calendar.

iii. Click **Save**. The information is saved.

g) To view the invitation message for specific invitee, click (**Show Message** icon). The **Invitee Message** window pops up showing the invitation message.

Invitee Message window

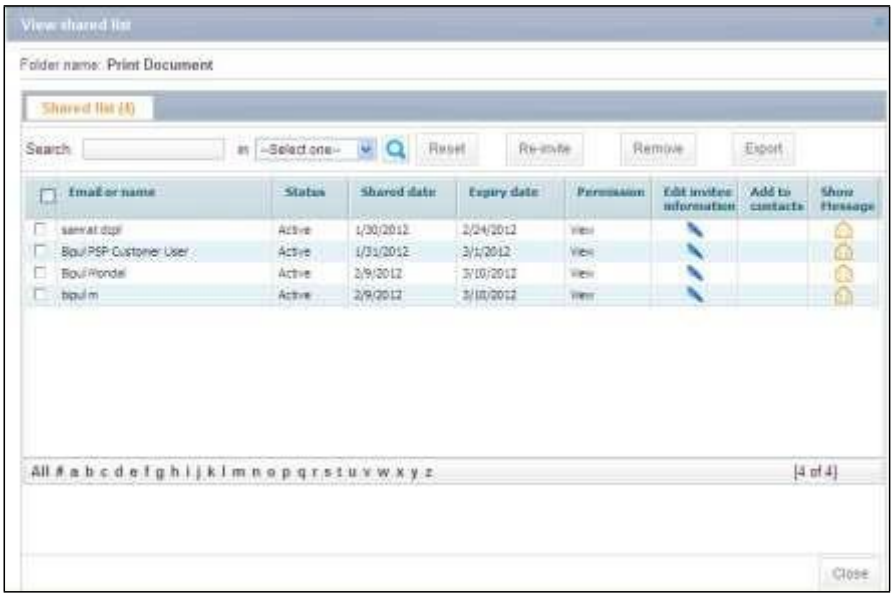
7. To send the invitation to specific contacts, click the **Create invitation** tab first and then click the **Send** button from the screen. The confirmation message appears if the share invitation is successfully sent.
8. Click **Close** button to close the **Share workspace folder** screen.

New users have to accept the invitation and register to ishipdocs application to view or modify the shared folder. For registered users the above process is not mandatory, they can access files and folders without accepting the invitation shared by other users.

Viewing shared list

1. To view the list of invitees for a particular folder, select the folder.
2. Click the downward arrow of

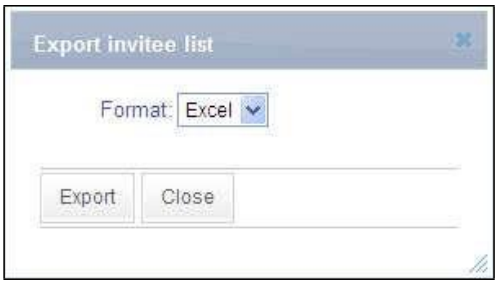
. Different options will appear.
3. Click the sixth option (**Shared list** icon). The **View shared list** screen appears which displays the list of invitees for that particular folder.



View shared list screen

4. To search the invitee from the shared list, enter the search string in the **Search** text box**,** select the search criteria from the **in** drop-down list and click (**Search** icon). The particular invitee will be displayed in the grid section. Clicking **Reset** button will erase the search string from the **Search** text box.

5. To re-invite any contact(s) from the shared list, select the invitee(s) and click the **Re-invite** button. The invitation will be again sent to the specific invitee(s) and a confirmation message will be displayed after successful invitation.
6. To remove invitee(s) from the Shared list, select the invitee(s) and click the **Remove** button. The selected invitee(s) will be removed from the shared list and a confirmation message will be displayed after successful deletion.
7. To export the existing invitee list, click the **Export** button. The **Export invitee** list window appears.



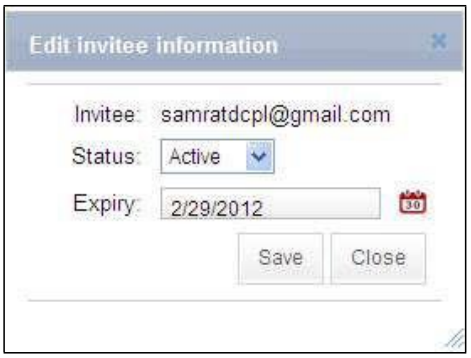
Export invitee list window

a) Select the file format in which you want to export the invitee list from the **Format** drop-down list.

b) Click the **Export** button. The list of invitees will be exported in the selected format.

c) Click the **Close** button to close the window.

8. To modify the existing invitee, click (**Edit invitee information** icon). The **Edit invitee information** window pops up.



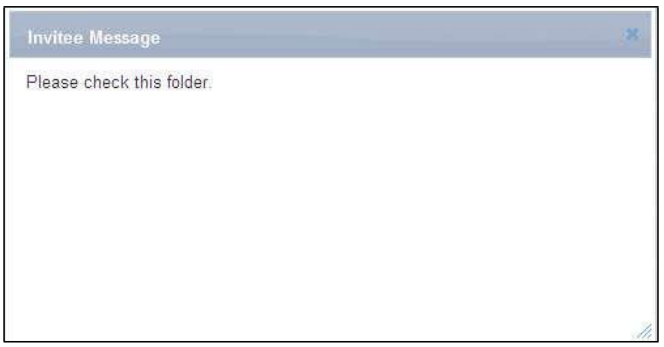
Edit invitee information window

a) Select the status of the invitee from the **Status** drop-down list. There are two options: **Active** and **Inactive**.

b) To select the expiry date, click (Calendar icon). The calendar will be displayed, select the date from the calendar.

c) Click **Save**. The information is saved.

9. To view the invitation message for specific invitee, click (**Show Message** icon). The **Invitee Message** window pops up showing the invitation message.



Invitee Message window

10. Click the **Close** button to close the **View shared list** screen.

Refreshing the Page

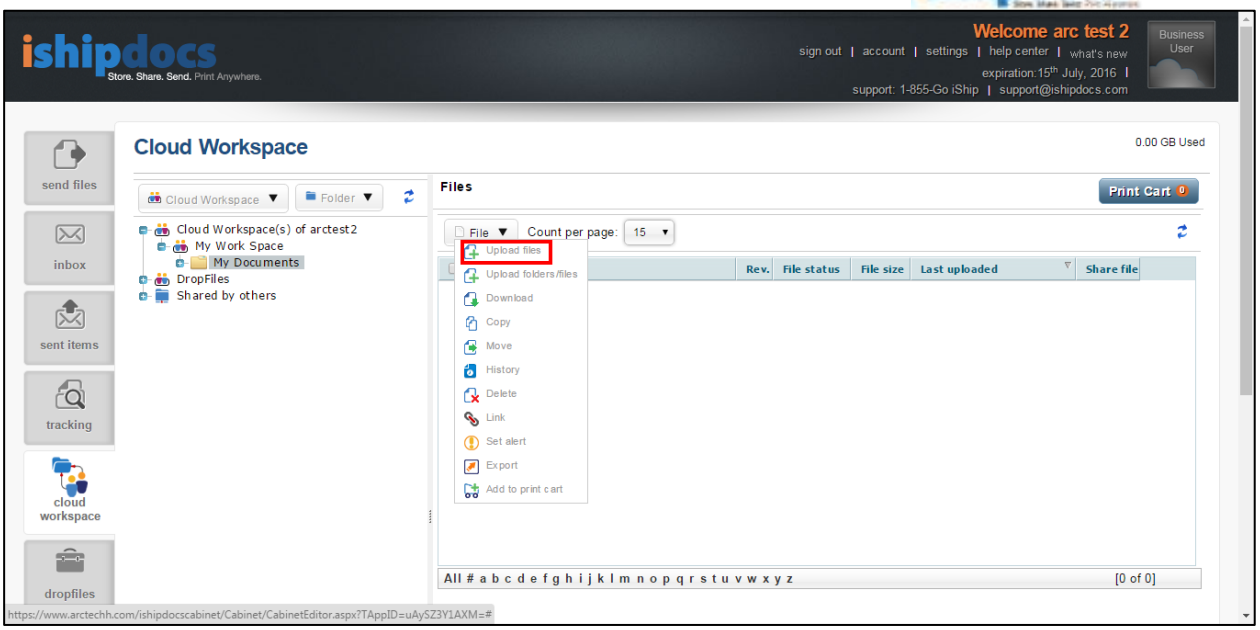
Click (**Refresh** icon). The Work Space section gets refreshed.

Files

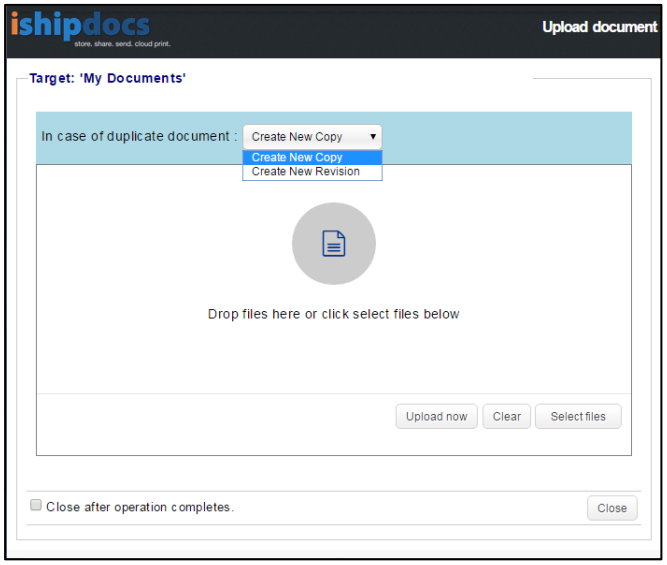
Adding Files

Go to **Cloud Workspace** > Click on the Folder where you would like to upload the file(s) from the left-hand panel > Click on **File** drop-down > Click on **Upload Files** menu item

Screenshot below highlights the **Upload Files** menu item on the **Cloud Workspace** screen,



The **HTML 5 Upload Tool** will now open up instead of the **Silverlight Upload Tool**. This screen is shown below,

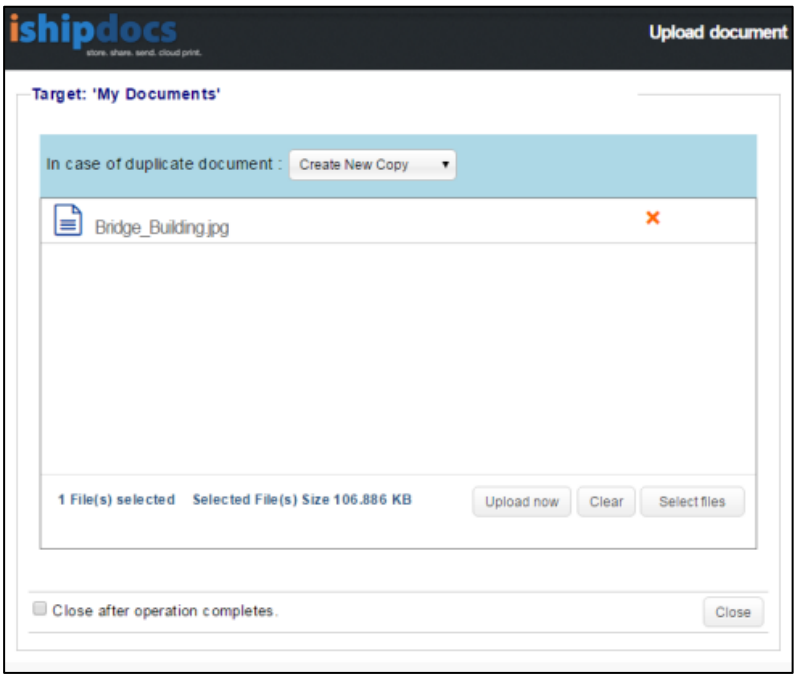


Steps to demonstrate upload of files:

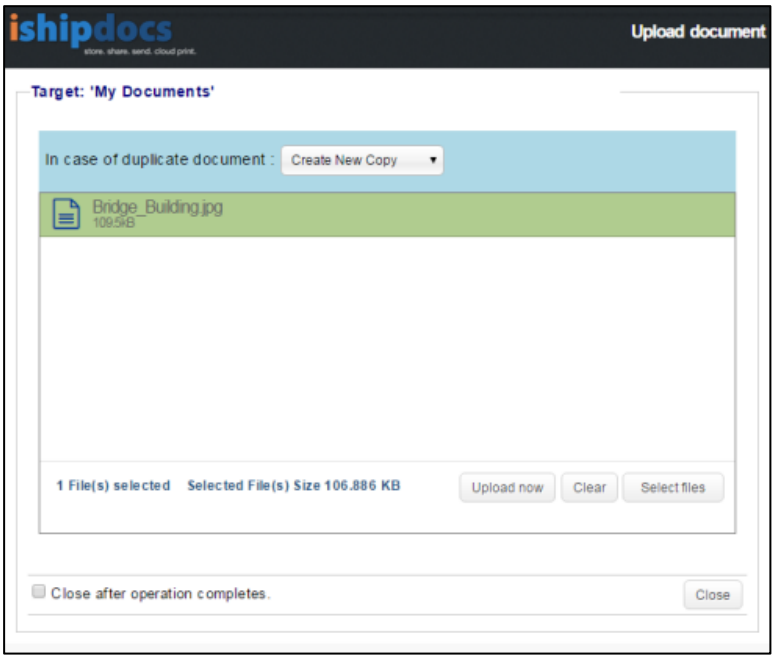
- Click on **[Select Files]** button to open the *Document Selection window* to select files/images from the local computer
- Select the files/images and then click on **[Open]** button on the *Document Selection window* to attach the files in the upload tool

  Alternatively
  - Open any folder on the local computer, drag and then drop the selected files/images in the space provided in the upload tool on the application page

    The selected file is shown in the screenshot below,

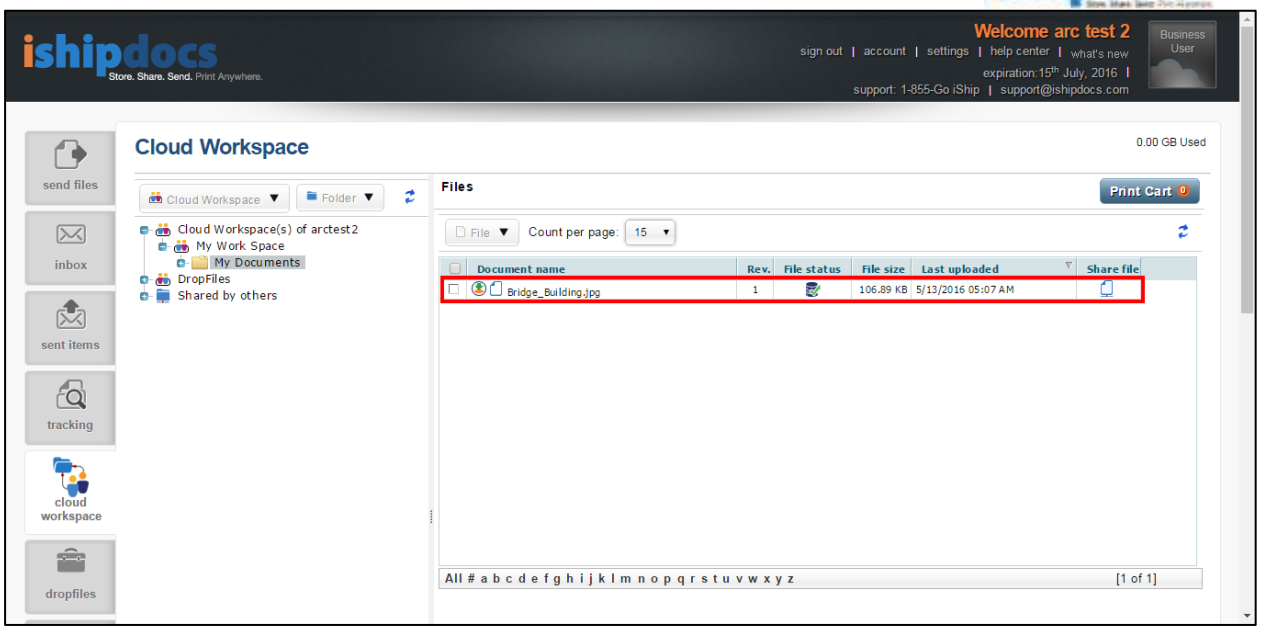


- Click on **[Upload Now]** button to start the uploading process
- *Optionally:* Tick the checkbox **Close after operation completes** will automatically close the open Upload Tool window after the completion of upload
- *Optionally:* Select the option **Create New Copy,** if an already existing file in the application is being uploaded again. This will create a new copy of the already existing file. Select the option **Create New Revision** if a new revised version of the document with the same name is being uploaded again. Below screenshot displays the successfully uploaded file on the Upload Tool interface:



- *Is needed:* Click **[Clear]** button to remove the selected files
- After the completion of successful upload, click **[Close]** to close the window

Screenshot below displays the successfully uploaded file under the target folder: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sent items
tracking
cloud workspace
dropfiles
Cloud Workspace
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Cloud Workspace
Folder
Cloud Workspace(s) of arctest2
My Work Space
My Documents
DropFiles
Shared by others
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Print Cart 0
File
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Rev.
File status
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[1 of 1]

10. **Creating Revised Document**

a) If you want to modify the existing document, click (**Download** icon). The file gets downloaded.

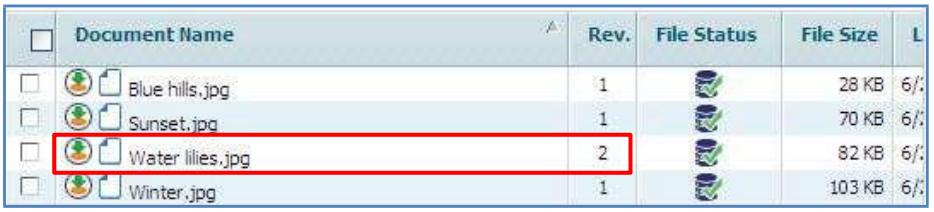
b) Modify the file.

c) Click **Add/ Upload** from the **File** drop-down list. The **Upload Document** window appears.

d) Select **Create New Revision** from the **In case of duplicate document** drop-down list.

e) Click **Select Files** and upload the modified file.

f) Refresh the page. The file will display as **Revised 2** as shown.



Revised document

11. Click **History** from the **File** drop-down list. You can see both the files, the original one as well as the revised one. You can download the files as per your requirement.

Copying Files

1. Select the files that you want to copy from one folder to another folder.
2. Click the downward arrow of

. Different options will appear.
3. Click (**Copy files** icon). The **Select Folder** window popped up.

Select folder window

4. Select the folder where you want to copy the files. A warning message appears stating whether the user is sure to copy the file in that particular location.
5. Click **OK** if you are sure to copy that file in that particular location.
6. Click **Close** to close the window. The file will be copied to the folder as per your choice.

Moving Files

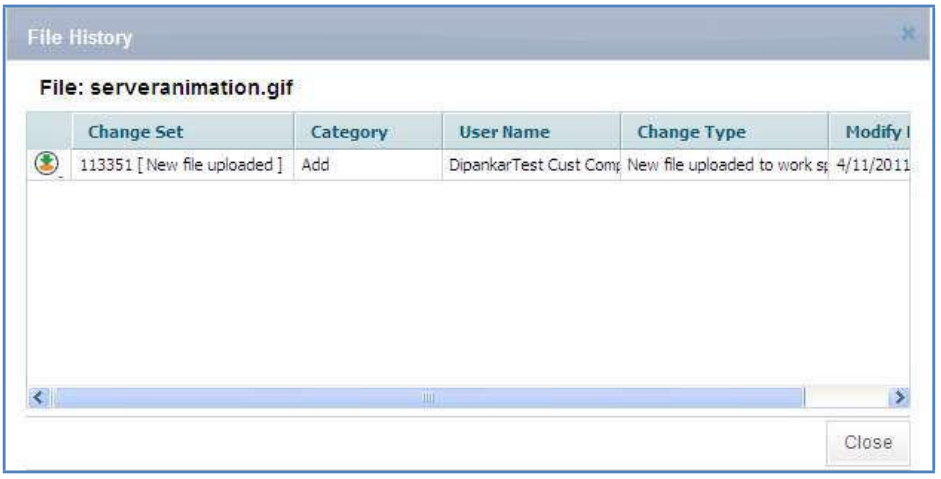
1. Select the files that you want to move from one folder to another folder.
2. Click the downward arrow of

. Different options will appear.
3. Click (**Move files to other folder** icon). The **Select Folder** window popped up.
4. Select the folder where you want to move the files. A warning message appears stating whether the user is sure to move the file in that particular location.
5. Click **OK** if you are sure to copy that file in that particular location.
6. Click **Close** to close the window. The file will be moved to the folder as per your choice.

Viewing History

1. Click the downward arrow of

. Different options will appear.
2. Click (**View file history** icon). The **File History** window popped up, where you can see the files history.



File History window

3. Click **Close** to close the File History window.

Deleting Files

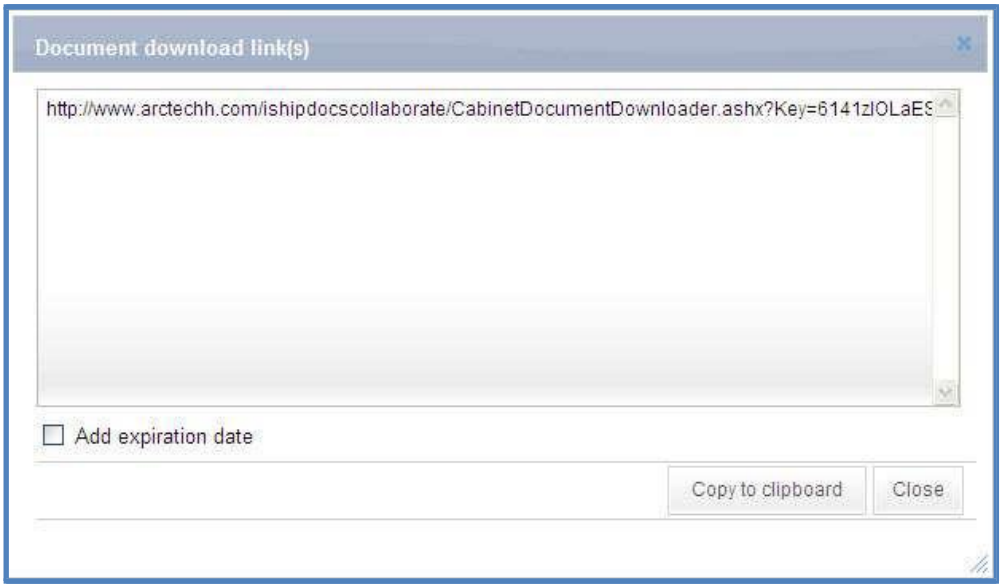
1. Click the downward arrow of

. Different options will appear.
2. Click (**Delete files** icon). A warning message pops up asking whether you are sure that you want to delete the file(s).
3. Click **OK**. A confirmation message appears stating "Selected documents successfully deleted".
4. Click **OK**. The document(s) gets deleted from the selected folder.

Linking Files

1. Select the folder or cabinet from the Cabinets section. The files within the folder those are uploaded are displayed in the Cabinet Files list.
2. Click the downward arrow of

. Different options will appear.
3. Click the sixth option (**Link files** icon). The **Document Download Link(s)** window popped up. The link of the download link is displayed by default.



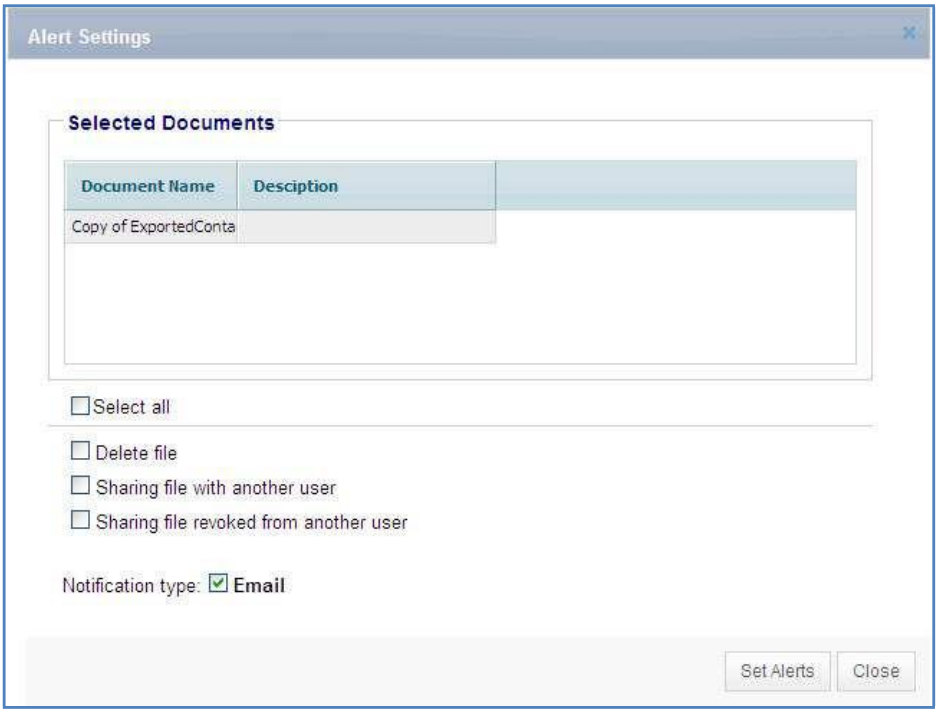
Document Download Link(s)

4. You may or may not want to add expiry date. Adding expiry date implies that the file can be downloaded before the expiry date only and if the date exceeds due to any reason you won't be able to find out the file.
   a) Select **Add expiry date** check box to add the expiry date.
   b) Click (**Calendar** icon) to add the expiry date from the calendar.
   c) To remove the expiry date, deselect the **Remove expiration date** check box. This means there is no stipulated time frame for downloading the package.
   d) Click **Individual Expiration Date** to create your own expiry date.
5. Click **Create Link** and the link gets added under **Document Package Download Link(s)** text area.
6. Click **Copy to Clipboard**. The confirmation message appears stating links get successfully added to the clipboard.
7. Click **Close**. The link gets copied to the clipboard.

Setting Alert

1. Select the folder or cabinet from the Cabinets section. The files within the folder those are uploaded are displayed in the Cabinet Files list.
2. Select the file(s) from the list for which you want to set alert.
3. Click the downward arrow of File. Many options will appear.

4. Click the seventh option (**Subscribe for alert** icon). The **Alert Settings** window popped up. The selected documents get displayed under **Selected Documents** section.



Alert Settings window

5. For setting notification for the file(s), select the appropriate options. The **File Alert Subscription** section consists of the following options:
   - **Delete File:** If you select this check box, any file deleted will be notified.
   - **Sharing file with another user:** If you select this check box, any file shared to some other person will be notified to other members.
   - **Sharing file revoked from another user:** If you select this check box, any file sharing cancelled or withdrawn from someone will be notified to other members.
6. Select **E-mail** as a mode of notification.
7. Click **Set Alerts** to set the notification alert as per your selection. The confirmation message appears to confirm successful settings.
8. Click **OK**.
9. Click **Close** to exit from the **Alert Settings** window.

Exporting the List of Files

1. Select the folder or cabinet from the Cabinets section. The files within the folder those are uploaded are displayed in the Cabinet Files list.
2. Click the downward arrow of

. Many options will appear.
3. Click the eighth option (**Export** icon). The **Export Data** window popped up.

Export Data window

4. Select the type of format from the Format drop-down list. The options are **Excel**, **CSV**, and **XML**. Selecting specific option will enable the list of files to get exported according to that particular format.
5. Click **Export**. The **File Download** dialog box appears.
6. Click **Open** to view the document that gets exported then save it to a particular location or else click **Save**. The **Save As** dialog box appears. Select the specific location where you want to save the document and click **Save**. The document gets saved into that particular location and the confirmation message appears.
7. Click **Close** to close the Export Data window.

Refreshing the Page

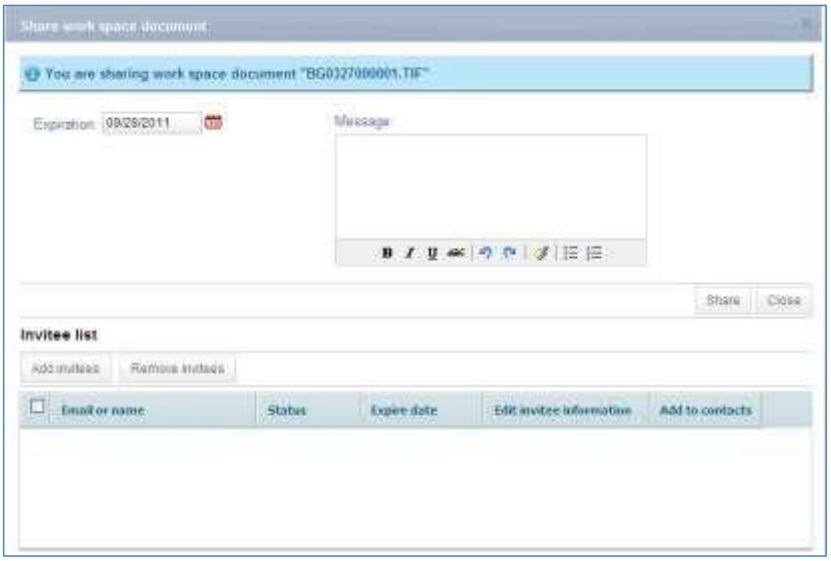
Click (**Refresh** icon). The Files section gets refreshed.

Downloading File

1. Select the folder or workspace. The list of files within the folder is displayed.
2. Select the file from the list that you want to download.
3. Click (**Download** icon). The **File Download** dialog box appears.
4. Click **Open** to view the file or **Save** to save the file in a particular location in your machine.

Share Workspace document

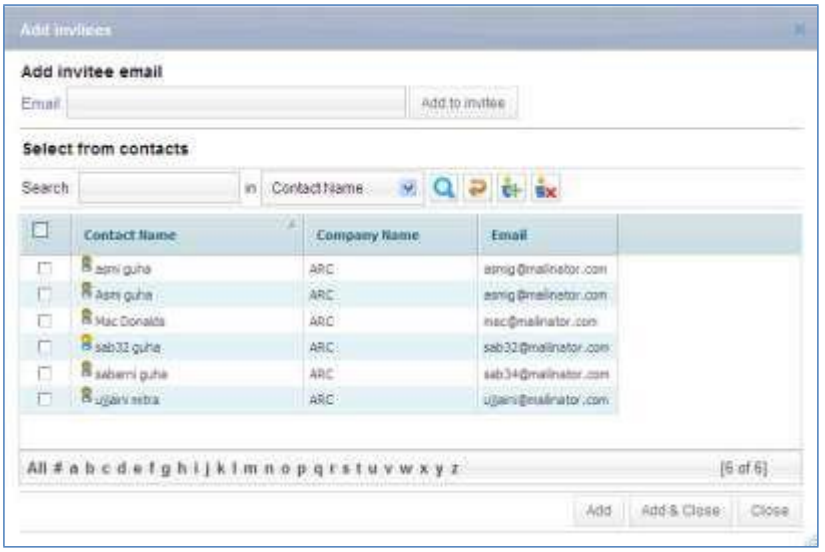
1. Select the file that you want to share.
2. Click (**Share File** icon). The **Share work space document** window appears. At the top of the window the name of the document that you are sharing will appear.



Share work space document window

3. In the **Share Info** section:
   - Click (**Calendar** icon) to select the expiry date of the shared document.
   - Write down a message in the **Message** text field.
4. In the **Invitee list** section:

a) Click **Add Invitees** from the **Invitees List** section. The **Add Invitees** window pops up.



Add invitees window

b) Enter the email in the **Email** text box.

c) Click **Add to invitee**. If the e-mail id is new then a confirmation message appears stating that the e-mail is successfully added. You can view the mail id within the invitees list.

d) If you want to add contacts from the **My Contacts** section, select the contact name from the list and click **Add**. A confirmation message appears stating "invitees successfully added". You can view the contacts within the invitees list.

e) Click **OK**.

f) Click **Add & Close** or click **Add** and **Close** separately to close the window.

You can add new contacts and delete existing contacts from the list by clicking (**Add New Contact** icon) and (**Delete Contact** icon) respectively. Click (**Reset** icon) to reset the contacts. To know more about Adding New Contact please go through How To Manage Contacts.

5. **Removing Invitees:**

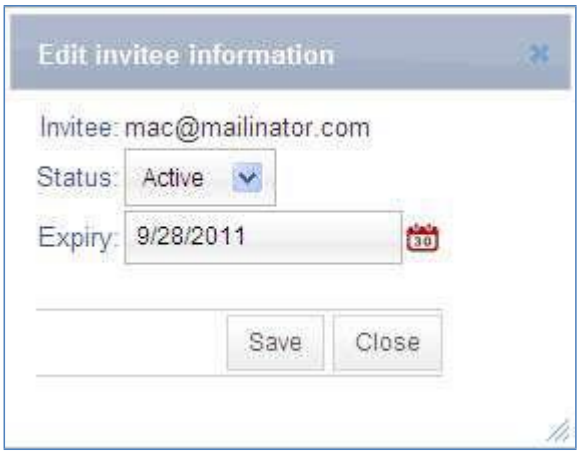
a) Select the invitee(s) whom you want to remove from the invitee list.

b) Click **Remove Invitees**. A confirmation message appears stating "Selected Invitee(s) successfully deleted".

c) Click **OK**. The invitee(s) gets deleted from the list.

6. **Editing Invitee Information:**

a) Click . The **Edit invitee information** window pops up.



Edit invitee information window

b) Select the status from the **Status** drop-down list. There are two options: **Active** and **Inactive**.

c) Click to select the expiry date.

d) Click **Save**. A confirmation message appears stating "Invitee information successfully saved".

e) Click **OK** to continue.

7. Click **Share**. A confirmation message appears stating "Selected item successfully shared".
8. Click **OK** to continue.
9. Click to close the window.

Adding Comment

1. Click (Comment icon). The **Comments** window appears.

Comments window

2. Enter the comment in the **Enter your comment here** text box.
3. Click **Add Comment**. A confirmation message appears.

Confirmation message

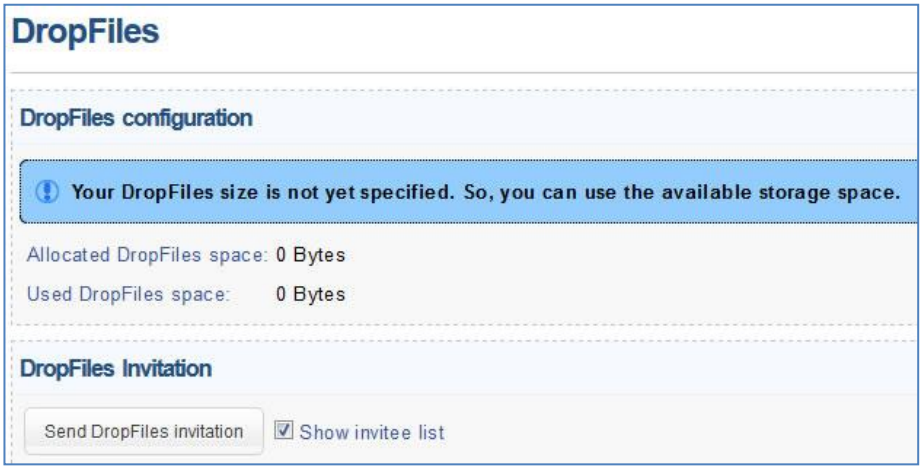
4. Click **OK** to continue.

You can delete the comment by clicking (**Delete** icon). You can also edit the comment if required and add more comments to it.

How to Send DropFiles Invitation

From this module you can give permission to the selected users to view the DropFiles in the store files. Follow the given procedure to share the DropFiles.

Click (**DropFiles** icon) from the left hand panel. The **My DropFiles** screen appears.

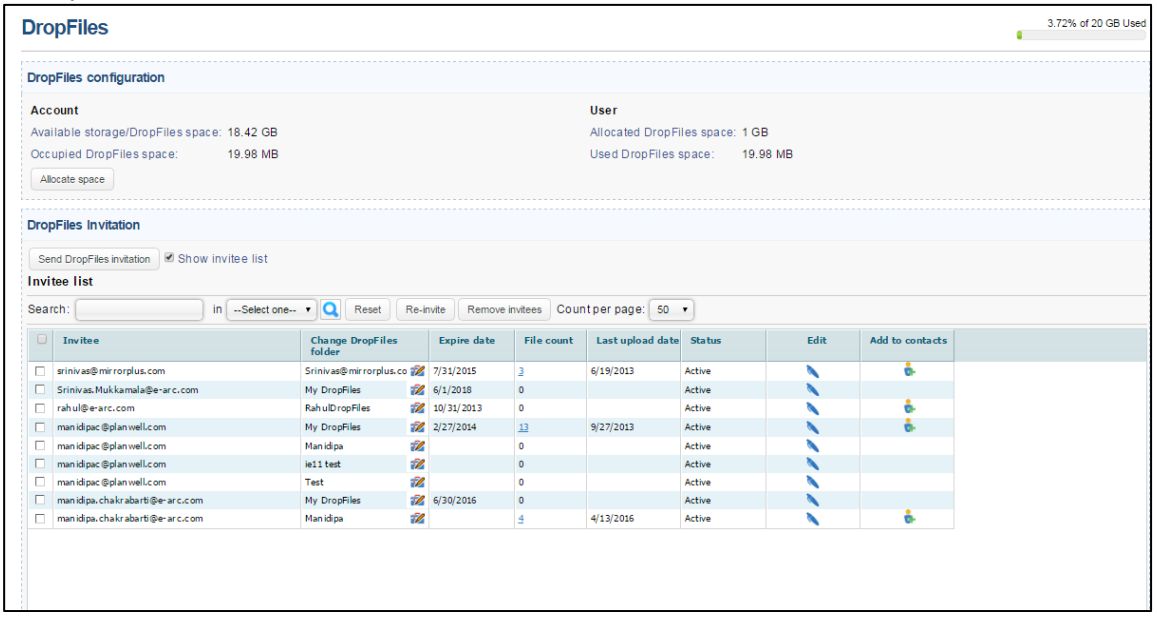


DropFiles screen

DropFiles Info

The **DropFiles Info** section consists of the following information: Available Storage Capacity, DropFiles storage capacity, DropFiles occupied size, Current DropFiles name, and the url of the location of your DropFiles. You can change the DropFiles Storage Capacity and the Current DropFiles Name.

A DropFiles screenshot is shown below,



To change the DropFiles capacity, follow the given procedure.

a) Enter the DropFiles storage capacity in numerical number in the DropFiles Storage Capacity text box.

b) Select the capacity from the adjacent drop-down list. The options are **Byte**, **KB**, **MB**, **GB**, and **TB**.

c) Click **Save**. A confirmation message appears stating "Dropbox information successfully saved".

d) Click **OK**.

e) You can allocate DropFiles size to the individual user. Click **Allocate user DropFiles size** button. The **Allocate user DropFiles size** window appears.

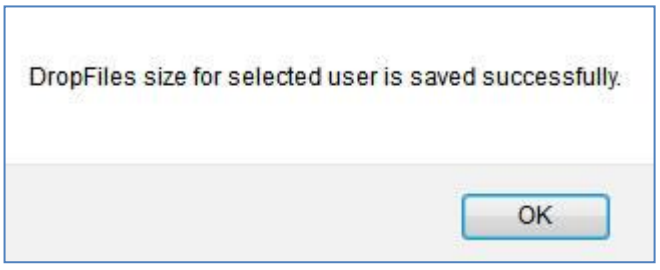
Allocate user DropFiles size window

f) Select user from the **Select user** drop-down list.

g) Enter the DropFiles storage capacity.

h) DropFiles occupied size is given.

i) Click **Save**. A confirmation message appears.

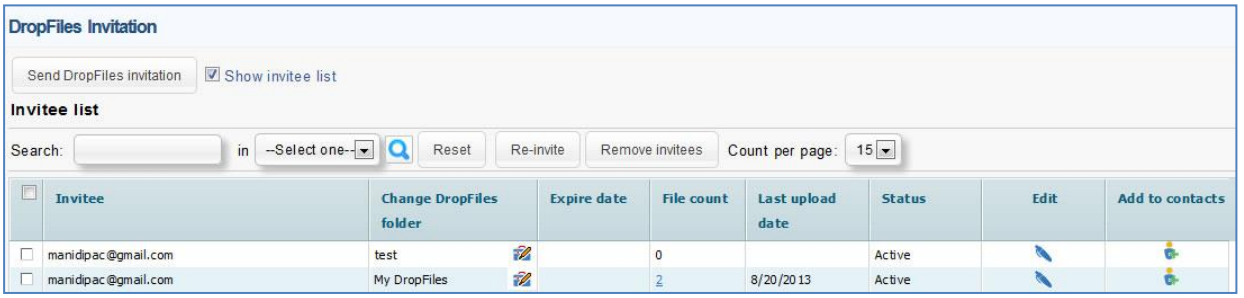


Confirmation message

Invitee List

From this section you may send invitation to the persons who can able to view the documents in your DropFiles. Follow the given procedure to invite the persons to view the documents within the DropFiles.

1. Select **Show invitee list** check box. The Invitation list will be displayed below the checkbox.



Invitee list section

2. **Searching Invitees**

   If the invitee already exists you may search the invitees. To do so, follow the given procedure.

   a) Enter the search item in the **Search** text box.

   b) Select the particular option from the **in** drop-down list. The options are: **Email or Name** and **Expiry**.

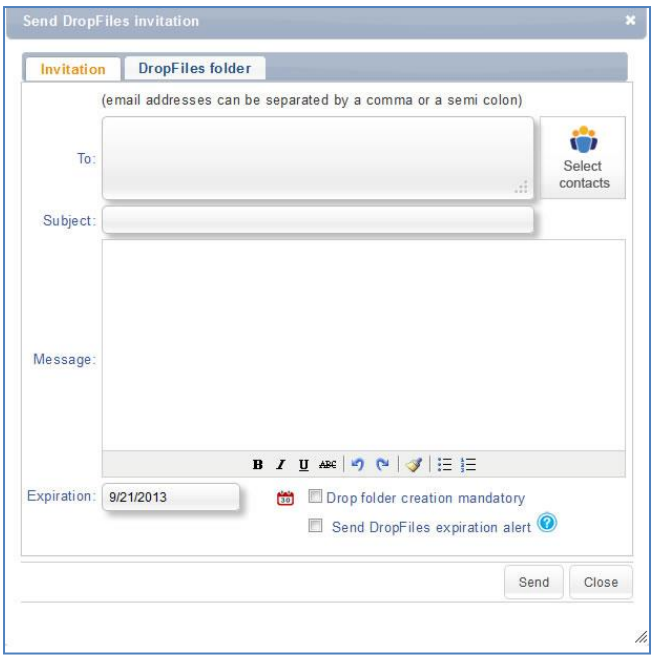
   c) Click (**Search** icon). The specific option is displayed in the Invitee list.

   d) You may also click All / # / alphabets to search the contacts.

3. **Inviting Members**

   To invite the members follow the given procedure.

   a) Click **Send DropFiles invitation** button adjacent to the **Show invitee list** checkbox. The **Send DropFiles Invitation** window pops up. The window has two tabs: **Invitation** and **DropFiles Folder**.

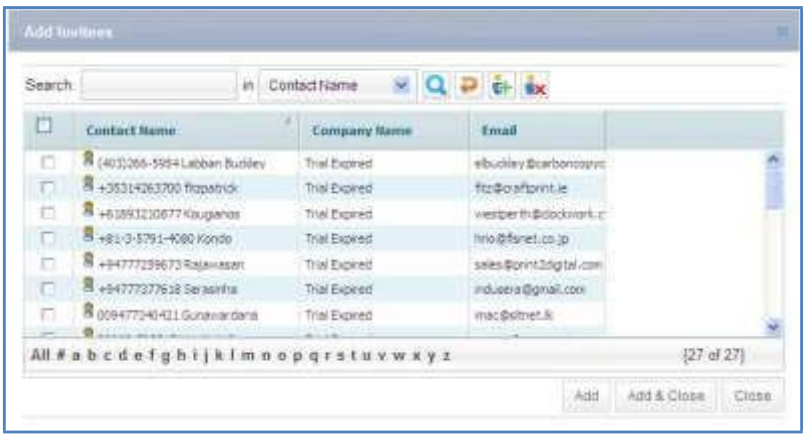


Send DropFiles Invitation window

b) **Invitation tab:**

i. Click

to add invitees. The **Add Invitees** window pops up.



Add Invitees window

ii. Select the contact name from the list of contacts.

iii. Click **Add**. A confirmation message appears.

Confirmation message

- **Searching Invitees**

i. Enter the search item in the **Search** text box.

ii. Select the particular option from the **in** drop-down list. The options are: **Contact Name**, **Contact Last Name**, **Company Name**, **Email**, **Phone**.

iii. Click (**Search** icon). The search member will be displayed in the grid section.

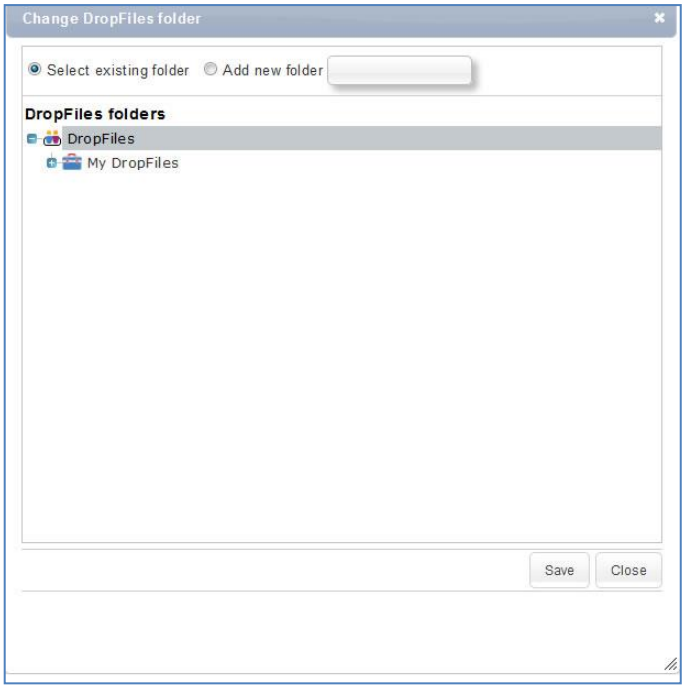
iv. Select the member and click **Add** him/her in the invitee list.

v. Click **Close** to close the window.

Click **Reset** button to reset the setting.

a) **DropFiles Folder tab**

i. Click the **DropFiles Folder** tab. The following screen appears.



DropFiles Folder tab

ii. You can select either **Select Existing Folder** option or you can create a new folder by selecting **Add New Folder** option.

iii. If you select existing folder option you can select a folder from the existing folder list and the person will be invited in that particular folder. If you do not select any folder the files will be dropped in to My DropFiles folder by default.

iv. Select **Add New Folder** option and enter the folder name in the **Add New Folder** text box.

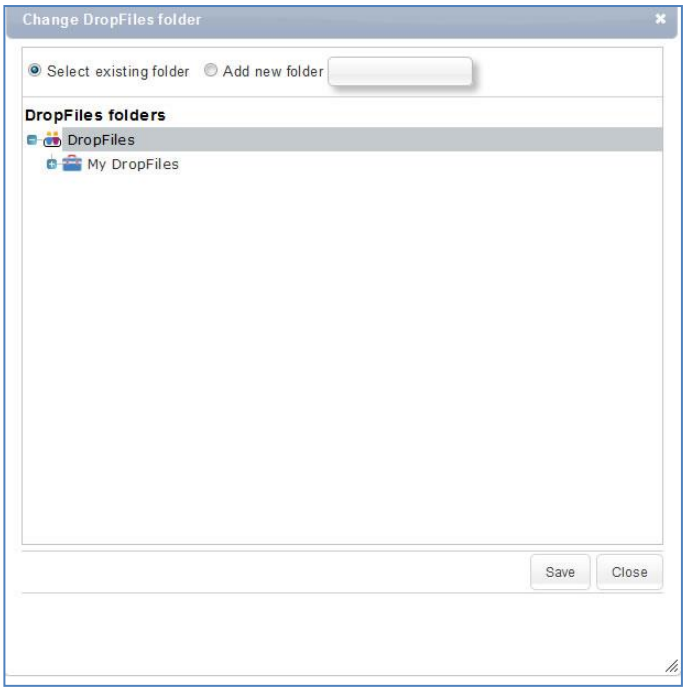
v. Click **Save**. A new folder will be created.

vi. Click **Close** to close the window.

4. **Changing DropFiles Folder**

a) Select the one for whom you want to change the DropFiles.

b) Click to change the DropFiles. The **Change DropFiles Folder** window pops up.



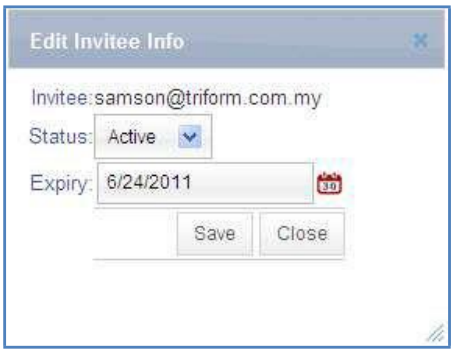
Change DropFiles Folder window

c) You may select an existing folder or can create a new folder and click **Save** and the folder will be saved as per your requirement and the person will be invited in that particular folder from then onwards.

d) Click **Close** to close the window.

5. **Editing Invitee Information**

a) Click to edit the invitee information. The **Edit Invitee Info** window pops up.



Edit Invitee Info window

b) You can change the status from the **Status** drop-down list. The options are **Active** and **Inactive**. If the option is active the person will be able to upload his files in the selected time frame and if it is inactive the person won't be able to upload his file in that time frame.

c) Click to modify the expiry date. You may extend the date or curtail the date as per your requirement.

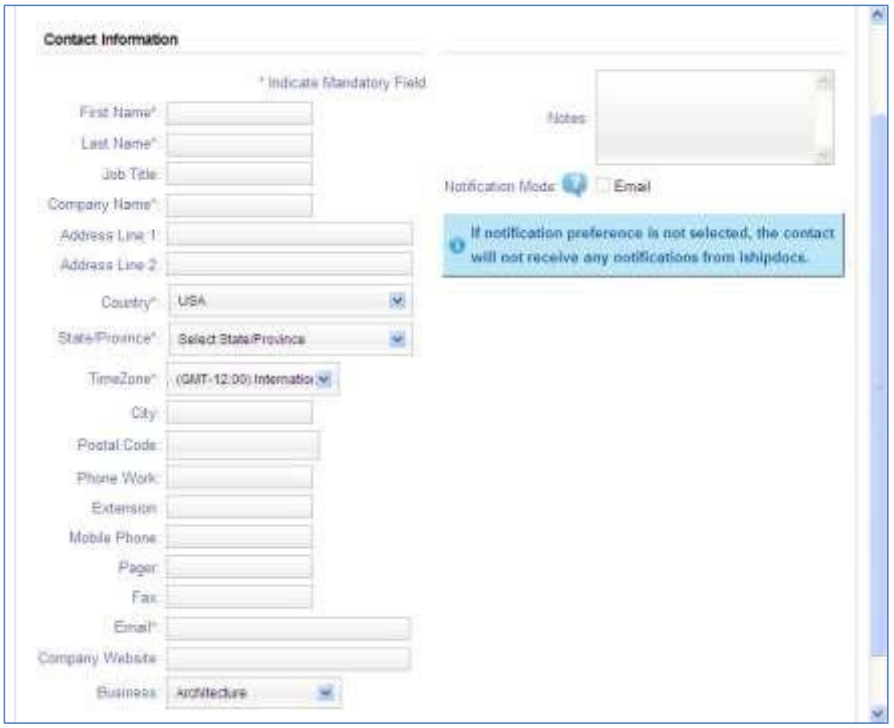
d) Click **Save** to save the invitee information. A confirmation message appears.

e) Click **OK** and the information gets modified.

6. **Add to Contacts**

a) If the contacts are not added to the contact list (**Add to Contacts** icon) appears adjacent to that particular contact.

b) Click (**Add to Contacts** icon). The **Add Contact** window appears.



Add Contact window

c) Fill up all the specific fields of the following sections: Contact Information and Other Important Information. The fields with the red marks are to be considered as mandatory fields so you have fill up at least those specific fields.

d) Click **Save**. The confirmation message appears at the top of the screen if added successfully.

e) Click **Close** to close the window. You can see the contact added under Contact/Group Name list.

You can click **Save & Close**. This will save the information and close the window automatically. You need not have to click **Save** and then **Close** separately.

7. **Re-inviting the Contacts**

a) Select the contact members whom you want to re-invite.

b) Click the **Re-invite** button. A confirmation message appears.

c) Click **OK** to continue.

8. **Removing invitees**

a) Select the contact members whom you want to remove from the list.

b) Click **Remove Invitees**. A confirmation message appears.

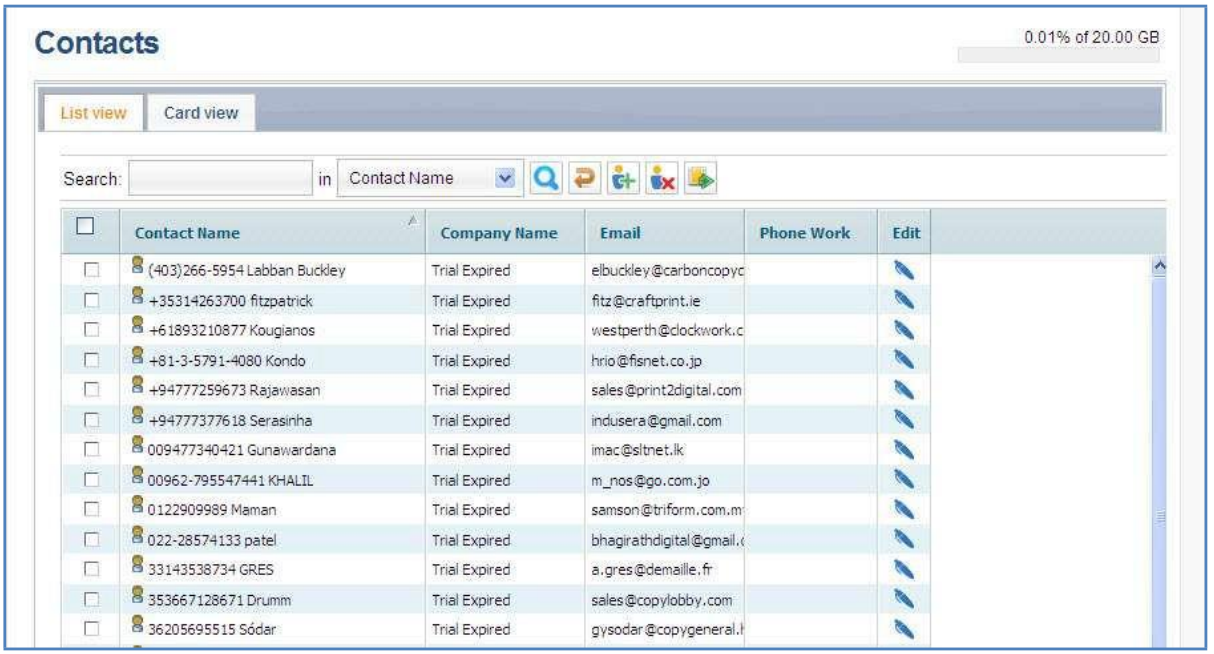
c) Click **OK** and the contact member gets deleted from the list.

How to Manage Contacts

From this module you can able to manage the address book. You may search, add contacts, add groups as well as export the list if required.

Follow the given procedure to manage contacts.

Click (**Contact** icon) on the left hand panel. The **Contacts** screen appears. The screen has two tabs List view and Card view. The List view tab displays all the contact in form of a list and the Card view tab displays all the contacts in form of cards.



Contacts screen

List view

List View screen is displayed by default, but if you want to come from Card View screen click the **List View** tab. The **List View** screen will be displayed automatically.

Searching Contacts

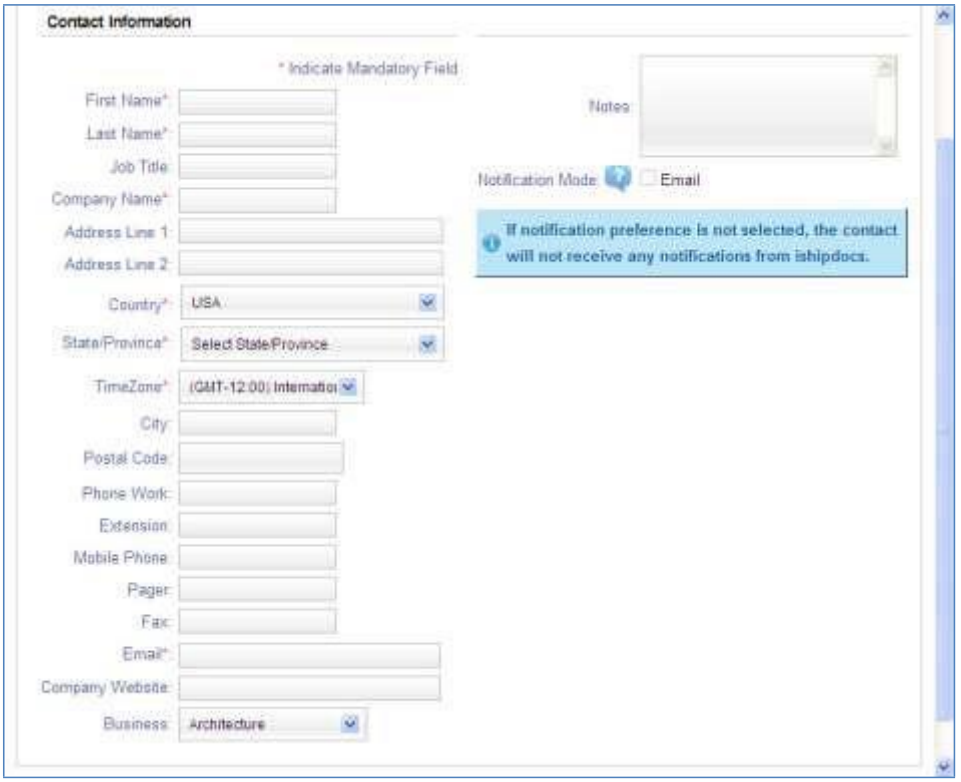
1. Enter the search item in the **Search** text box.
2. Select the required option with which you want to search in the adjacent in text box. The options are: **Contact Name**, **Contact Last Name**, **Company Name**, **Email**, and **Phone**.

3. Click (**Search** icon). The specific option is displayed in the List view screen.
4. You may also click All / # / alphabets to search the contacts.

Click (**Reset** icon) to reset the setting.

Adding New Contact

1. Click (**Add New Contact** icon) from the action bar. The **Add Contact** window appears.



Add Contact window

2. Fill up all the specific fields of the Contact Information section. The fields with the red stars are to be considered as mandatory fields so you have fill up at least those specific fields.
3. Click **Close** to close the window.

You can click **Save & Close**. This will save the information and close the window

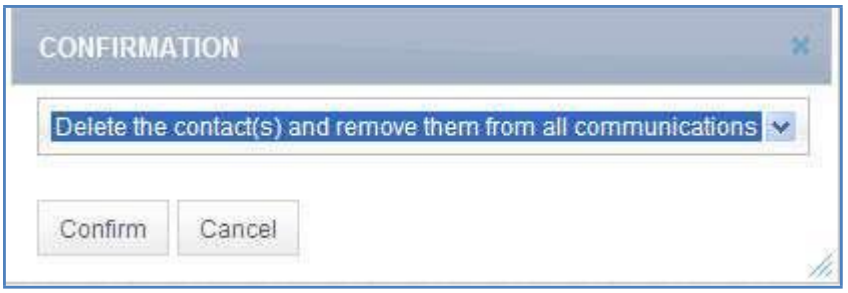
automatically. You need not have to click **Save** and then **Close** separately.

Editing Contacts

1. Click (**Edit Contact** icon) from the Edit section adjacent to the contact name. The **Edit Contact** window appears. Modify the fields as per your requirement.
2. Click **Save**. A confirmation message appears if updated successfully.
3. Click **Close** to close the window.

Removing Contacts

1. Select the contact(s) that you want to remove from the contact list.
2. Click (**Remove Contact** icon) from the action bar. The Confirmation window appears.



Confirmation window

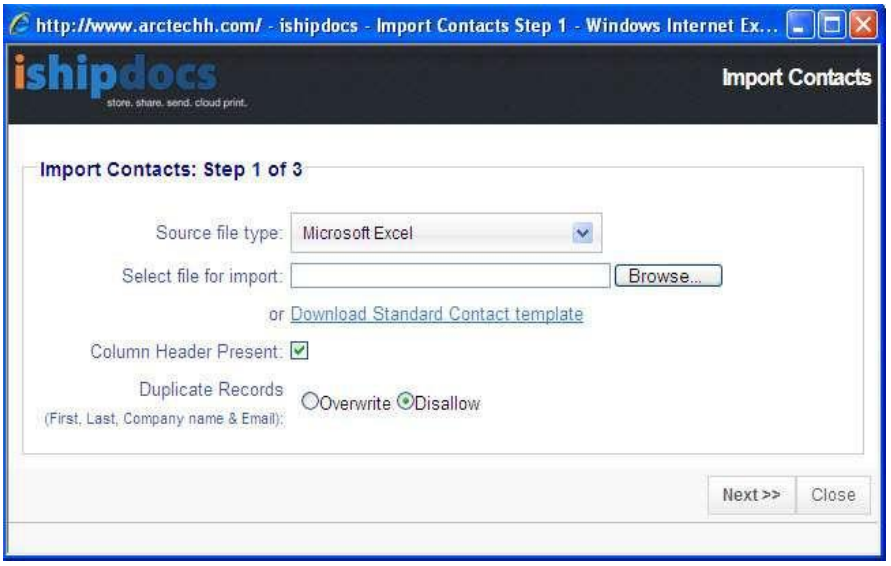
3. If you are sure to delete it from the list select **Delete the contact(s) and remove them from all communications** from the drop-down list.
4. Click **Confirm**. A confirmation message appears if deleted successfully.
5. Click **OK** to continue.

Importing/Exporting Contacts

1. Click (**Import/Export Contacts** icon) from the action bar. The **Import/Export contact** window appears.

IMPORT/EXPORT CONTACT window

2. Select **Import Contacts** if you want to import the contacts or **Export Contacts** if you want to export contacts from the drop-down list.
3. Click **OK**.
4. **Importing Contacts:**
   i. Select **Import Contacts** from the drop-down list in the **Import/export contact** window.
   ii. Click **OK**. The **Import Contacts Step 1** window appears.



Import Contacts Step 1 window

   iii. Select the source file type from the **Source file type** drop-down list.
   iv. Click **Browse** to locate the file to import in the **Select file for import** field.

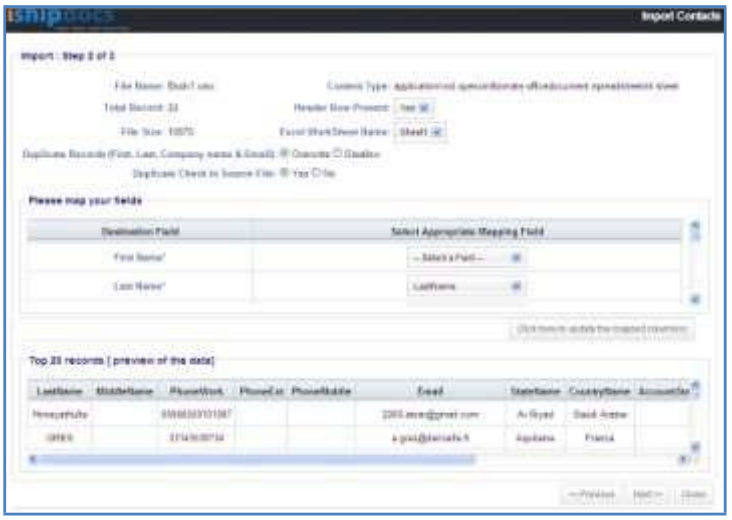
   Or,

   Click to download the standard contact template.

v. Select the **Column Header Present** check box to make the column header available.

vi. You can overwrite the records with the same name or disallow the duplicate one. Click to select the appropriate option for the **Duplicate Records**.

vii. Click **Next** to continue. The Import Contact Step 2 window appears. The **Import Contact Step 2** window displays the records available in the file. The top 20 records are displayed for your perusal. If you want to modify certain fields, please select the appropriate option to do so.



Import Contacts Step 2 window

viii. Click **Next** to continue. The file gets imported and the import summary is displayed in the **Import Summary** window.

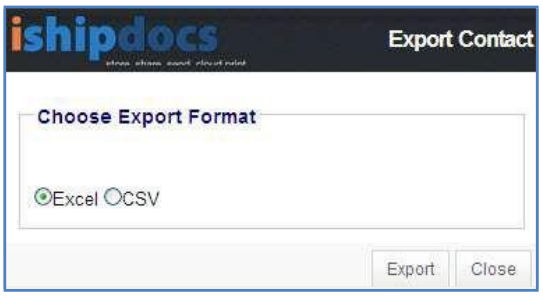
Import Summary window

ix. Click **Close** to close the window.

5. **Exporting Contacts:**

i. Select **Export Contacts** from the drop-down list in the **Import/export contact** window.

ii. Click **OK**. The **Export Contact** window appears.



Export Contact window

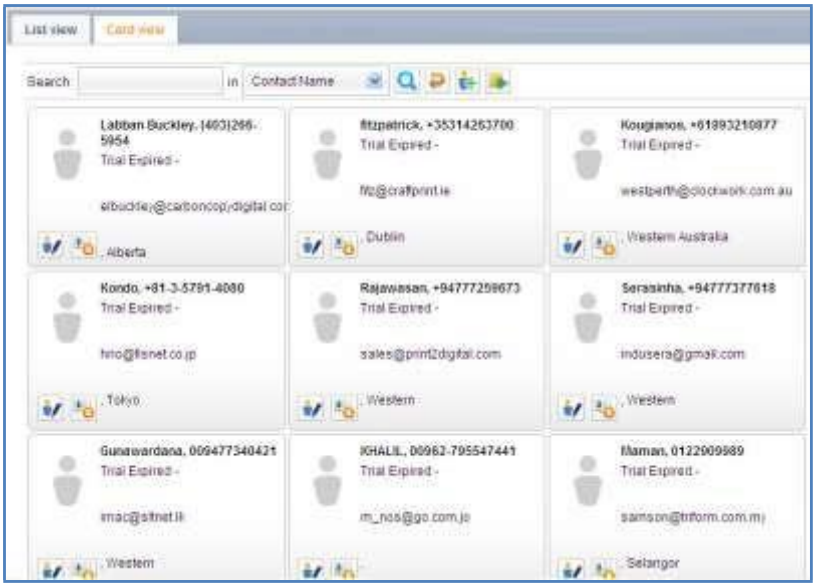
iii. Click to select the export format. You can export either excel sheets or the CSV files.

iv. Click **Export**. The **File Download** dialog box appears.

v. Click **Open** to open the file or click **Save** to save the file in a particular location.

Card View

Click the **Card View** tab the **Card View** screen appears.



Card view screen

Searching Contacts

i. Enter the search item in the **Search** text box.

ii. Select the required option with which you want to search in the adjacent in text box. The options are: **Contact Name**, **Contact Last Name**, **Company Name**, **Email**, and **Phone**.

iii. Click (**Search** icon). The specific option is displayed in the Card view screen.

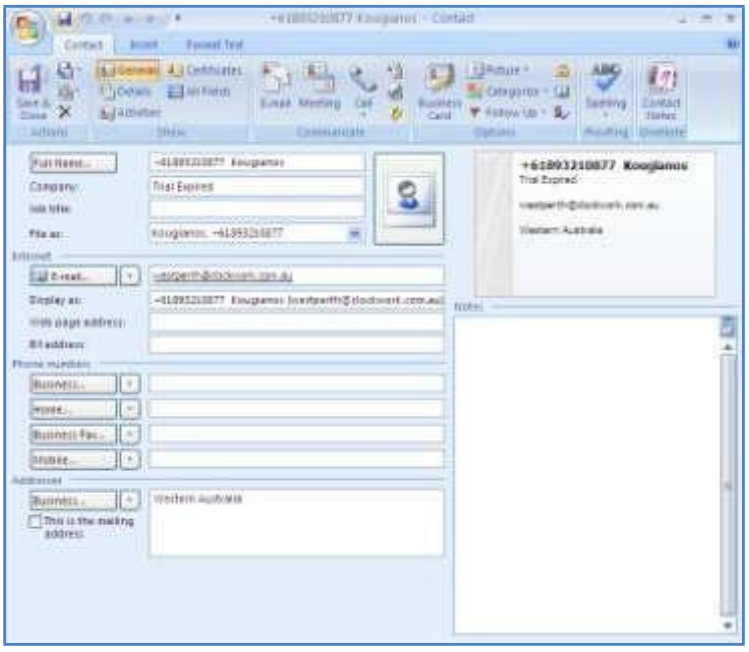
iv. You may also click All / # / alphabets to search the contacts.

Click (**Reset** icon) to view the whole list. You can add, edit and export/import contacts by clicking (**Add New Contact** icon), (**Edit Member** icon) and (**Import/Export Contacts** icon) respectively. To know the process please go through the above section.

Downloading VCard

i. Click (**Download VCard** icon). The **File Download** dialog box appears.

ii. Click **Save** to save the VCard or just click **Open** to view the Vcard. The VCard details of the Vcard are displayed as shown.



VCard details