

BulkShip Pro

Commercial Edition Guide

From Excel to label: setup and daily use — FedEx and UPS

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1. What is BulkShip Pro

BulkShip Pro is a Windows program that creates **shipments, labels and commercial invoices** from an Excel file, using **your own** FedEx or UPS account through their official API. There are two independent programs, **BulkShip Pro for FedEx** and **BulkShip Pro for UPS**, which work the same way.

> The screenshots in this guide show the FedEx version. The UPS version has the same screen layout.

2. What you need

- A **Windows** PC with internet access.
- A FedEx and/or UPS **business account** with its **API credentials**: Client ID, Client Secret and Account Number (for live shipments; on day one you can also test **AI Simulation Mode** without API keys). The website has a step-by-step guide to get them (Documentation > “How to get your API credentials”).
- A BulkShip Pro **licence** (includes a **free 7-day trial**, no card required).

3. Installation and activation

1. Install the **Commercial Edition** in 1 click from **Microsoft Store** (recommended, certified with zero SmartScreen warnings) or download the direct installer from bulkshippro.com.
2. Open the program. Your **7-day free trial** activates automatically on launch with internet access (you can also view and copy your PC's **Hardware ID (HWID)**).
3. To activate your paid licence or generate a manual key, click **Copiar ID** (Copy ID) inside “Gestión de Licencia / HWID”.
4. **7-day trial:** activates automatically on first launch or on the website by entering your HWID. **Purchase:** after payment, open the Activation Portal (bulkshippro.com/activar.html) and enter your order code and the HWID to get your official key.
5. Paste your official key into the program and click **Activar Clave Oficial** (Activate).

> You can see your HWID and licence status at any time with the “Gestión de Licencia / HWID” button in the side menu.

4. Connect your account (API settings)

1. In the side menu open **Configuración API** (API settings).
2. Choose the environment: **Producción Oficial** (real shipments) or **Sandbox / Pruebas** (testing).
3. Enter **Client ID**, **Client Secret** and **Account Number**.
4. Click **Probar Conexión OAuth2 en Vivo** (test the live connection) to check everything works, then **Guardar Credenciales API** (Save).

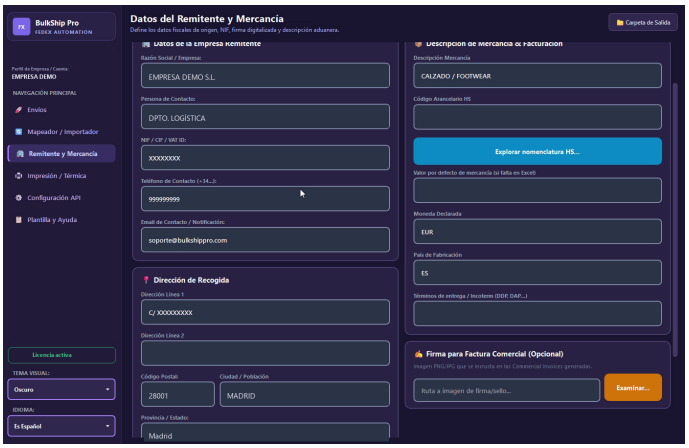
> The credentials are stored encrypted on your computer. In the UPS version the steps are equivalent with your UPS credentials.

5. Sender and goods details

In **Remitente y Mercancía** (Sender and goods) you fill in once the data that repeats on every shipment.

- **Sender company details**: company name, contact person, tax ID (NIF/CIF/VAT), phone and email.
- **Pickup address**: address, postcode, city and province.
- **Goods and invoicing**: description, HS tariff code (with a nomenclature search), **default value** (if missing in the Excel), **declared currency** (for example EUR), country of manufacture and incoterm.
- **Commercial invoice signature** (optional): a PNG/JPG image embedded in the generated invoices.

When finished click **Guardar Cambios del Remitente y Mercancía** (Save changes).



"Remitente y Mercancía" screen (example data).

6. Prepare your shipments file (Excel, CSV or PDF with OCR)

Download the official template from the **Descargar Plantilla** button (Shipments screen) or from **Plantilla y Ayuda** (Template and help). You can also load **.csv** files or **.pdf** packing slips/order lists (the smart OCR engine extracts recipients automatically). These are the columns of the official template:

`Order No · Invoice Number · Service · Packaging · Weight · Packages · Sign Required · Company · Name · Address · Address2 · Address3 · ZIP · City · State · Country · Phone · Email · Tax ID · Value · Insurance · Incoterm · Description · HSCODE · Currency`

Key columns: "Address3", "Tax ID" and "Currency"

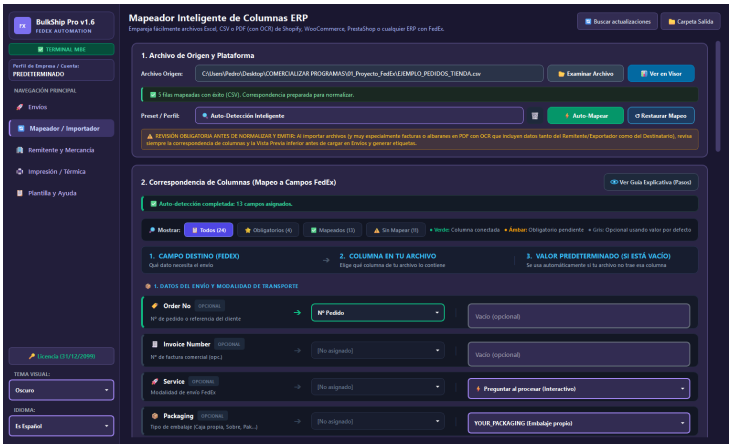
- **Address, Address2 and Address3**: let you split long addresses across up to 3 lines of 35 characters each.
- **Tax ID** (optional): recipient's Tax ID, VAT, EORI or CPF/CNPJ for customs clearance (mandatory for destinations such as Brazil).
- **Currency** (optional): 3-letter currency code for that row's declared value (**EUR**, **USD**, **GBP**…). If left empty, the default currency in "Remitente y Mercancía" is used.

7. Mapper / Importer (multi-sheet and profiles)

If your orders come from Shopify, WooCommerce, PrestaShop, an ERP with different column names or a PDF document (packing slip, invoice or pickup order), open **Mapeador / Importador** (Column Mapper):

• **1. Select the file and click “Auto-Map”:** choose your Excel, CSV or PDF with **Browse File** (if the Excel workbook has multiple sheets, pick the sheet in the dropdown) and click the green **Auto-Map** button. For Excel/CSV files, the smart engine and AI match each column to its official field; for **unstructured PDFs without tables**, AI/OCR automatically extracts the recipient details and shows the detected value right in each dropdown (`Detected in PDF: «...»`).

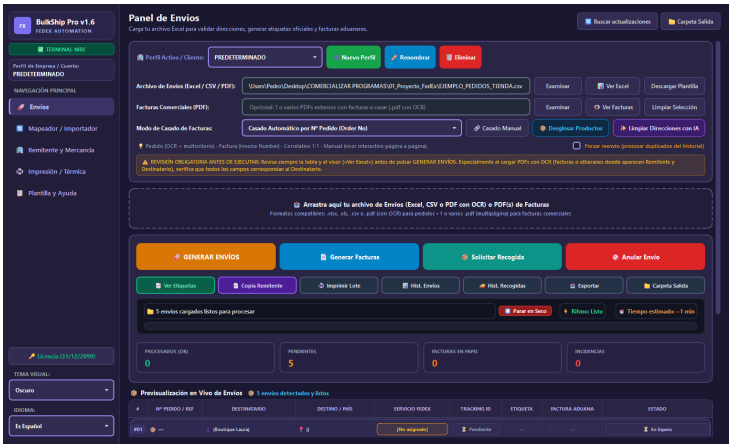
• **2. Preview & “Clean Addresses with AI”:** check the **Normalised Shipments Preview** (step 3). You can click **Clean Addresses with AI** to automatically split long streets across `Address / Address2 / Address3` (≤35 chars), verify ISO codes and normalise English customs descriptions, then click **Normalize & Load into Shipments**.



Smart column mapper.

8. Create shipments & Live Interactive Assistants

1. Open **Envíos** (Shipments) and choose the **active profile** (client/sender).
2. Load your file (`.xlsx, .xls, .csv, .pdf`) with **Examinar…** (Browse) or drag it onto the dotted area (if you drop an Excel file and an invoice PDF together, the program places each one in its slot automatically).
3. Check the summary: loaded, processed, pending shipments, incidents and **Paper Invoice** alerts.
4. Click **GENERAR ENVÍOS**. If any row has an address over 35 characters, a P.O. Box, a generic customs description, a missing Tax ID/CPF or a fixable postcode, a **Live Interactive Assistant** pops up so you can fix it on the spot or click **“Postpone until End”** to defer that shipment to the end of the batch without stopping the rest.



Shipments panel: file loading and action buttons.

> If an order is already in the history, the program does not send it again unless you tick **Forzar reenvío** (Force resend). This protects against duplicates.

9. Labels

- **Ver etiquetas del lote** (View batch labels): opens the viewer with all generated labels (zoom, page, rotate).
- **Imprimir Lote** (Print batch): sends the labels to your printer. Set the format in **Impresión / Térmica** (Printing / Thermal).
- **Copia del Remitente** (Sender copy): creates a copy for your records.
- **Carpeta de Salida** (Output folder): opens the folder where the PDFs and batch files are saved.



Batch label viewer (sample shipment).

10. Commercial customs invoices (ETD, Paper & 4 matching modes)

For shipments outside the European Union or to customs territories, click **Facturas Aduana** so the program generates commercial invoices automatically (in each row's currency), or load your own invoice PDF under **“Facturas Comerciales (PDF)”** choosing one of the **4 matching modes**:

- **Auto: Order No.** and **Auto: Invoice Number**: the smart engine reads the PDF (with OCR support for scanned invoices) and matches each page automatically to its shipment.
- **Sequential 1-to-1 (PDF Order)**: assigns page 1 to the first customs shipment, page 2 to the second, etc.
- **Manual Matching (Page-by-page viewer)**: opens the **Visual Matching Studio** with thumbnails, zoom, single or multi-page assignment, the **“AI Auto-Match”** and **“Match by Sequential Order”** buttons (1st invoice → 1st shipment, 2nd → 2nd…) and **“Attach Additional Documentation”** to append supplementary customs documents to the shipment.
- **Digital Customs (ETD / Paperless) vs Paper**: the program uploads the invoice electronically when the destination country supports it (including the Canary Islands by air) and shows an orange `Paper (Print 3 copies)` alert when customs requires 3 physical copies on the parcel.

Multi-Product Commercial Invoices (multiple items in a single shipment)

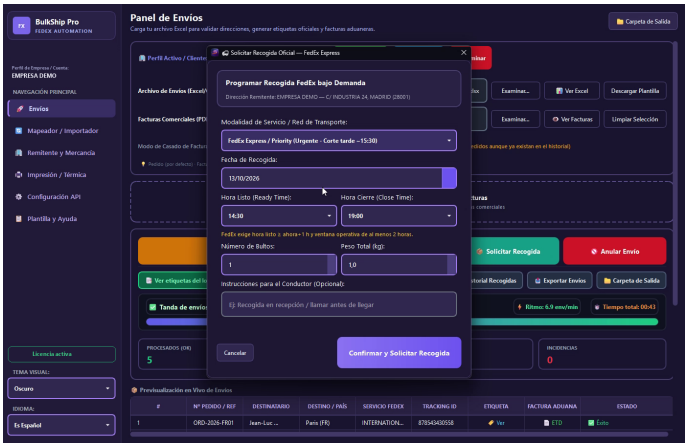
If a shipment contains several different items (for example, electrical supplies consisting of cables, LED spotlights and lamps), customs requires each item to be listed on its own line on the commercial invoice. You can do this in **two complementary ways**:

- **Method 1 — Multi-line syntax in the Excel** `Description` **cell**: separate each item with a semicolon (`;`), pipe (`|`) or line break (`Alt+Enter`) using the format `Qtyx ENGLISH DESCRIPTION [OPTIONAL_HS] = LINE_TOTAL_VALUE`.
  • **Example with per-line value:** `10x ELECTRICAL CABLES [854442] = 50; 20x LED RECESSED LIGHTS [940542] = 120; 10x DESK LAMPS [940521] = 130` (automatically totals 300.00 on the invoice even if the `Value` column is left blank; supports European `1.250,00` or US `1,250.00` numbers and unit prices with `@ 12.50`).
  • **Example with automatic proration:** `10x ELECTRICAL CABLES; 20x LED RECESSED LIGHTS; 10x DESK LAMPS` (automatically prorates the `Value` column proportionally by quantity).
- **Method 2 — Per-Recipient Visual Assistant "Itemize Products (Multi-Product)..."**: available directly in the **Shipments Panel** (next to *Manual Match* under Commercial Invoices), inside **"View Excel"**, and in the live customs correction popup during batch processing. Lists all recipients from your Excel on the left so you can assign 1 product to one recipient and multiple distinct products to another (with Qty, English Description, HS Code picker and Line Value), copy products across recipients, and save directly to the Excel file.

> Both the **Commercial Invoice PDF** (with a dynamic multi-row table, unit rate and line total) and the **electronic customs declaration (ETD / Paperless)** transmitted to the carrier will automatically include all itemised products.

11. Request a pickup

1. Click **Solicitar Recogida** (Request pickup).
2. Choose the service, the **date** and the time window (**ready time** and **close time**). The carrier requires the ready time to be at least one hour from now and a window of at least two hours.
3. Enter the number of packages, the total weight and, optionally, instructions for the driver.
4. Click **Confirmar y Solicitar Recogida** (Confirm and request pickup). You will get a **confirmation code (PRN)**; you can check it or cancel the pickup in **Historial Recogidas** (Pickup history).



Official pickup request.

12. Cancel a shipment

If you created a shipment by mistake, click **Anular Envío** (Cancel shipment), enter the tracking number and confirm. The program cancels the shipment with the carrier to avoid pickup and billing. Do it as soon as possible and **before the package is picked up**.

13. Other tools & 1-click updates

- **Check for updates (1-click OTA)**: use the top bar button to check and install new versions automatically without losing your profiles or history.
- **Shipment History & Export Shipments**: review all shipments made and export them to Excel or CSV.
- **Rate Quotes (Cotizador)**: check and compare your account rates before shipping.
- **Visual theme & 5 languages**: switch between light/dark mode and between **Spanish, English, Italian, French and German** at the bottom of the side menu.

14. Common problems

Symptom	What to do
Connection or credentials error	Review Client ID, Secret and Account Number in API settings and click “Probar Conexión”. Check that the environment (Production/Sandbox) is correct.
A row has a long address, P.O. Box or missing customs data	The Live Interactive Assistant opens during emission so you can fix it on the spot (with live X/35 counter) or click “Postpone until End”.
Invalid currency	Use a 3-letter code (EUR, USD, GBP…) in the Currency column or leave it empty.
The order is not sent again	It is already in the history. Tick “Forzar reenvío” only if you really want to duplicate it.
The licence does not activate	Check that the key is complete and belongs to this device (HWID). If it persists, write to soporte@bulkshippro.com with your HWID.

15. Support and legal notice

Support: **soporte@bulkshippro.com** · Web: **bulkshippro.com**

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