

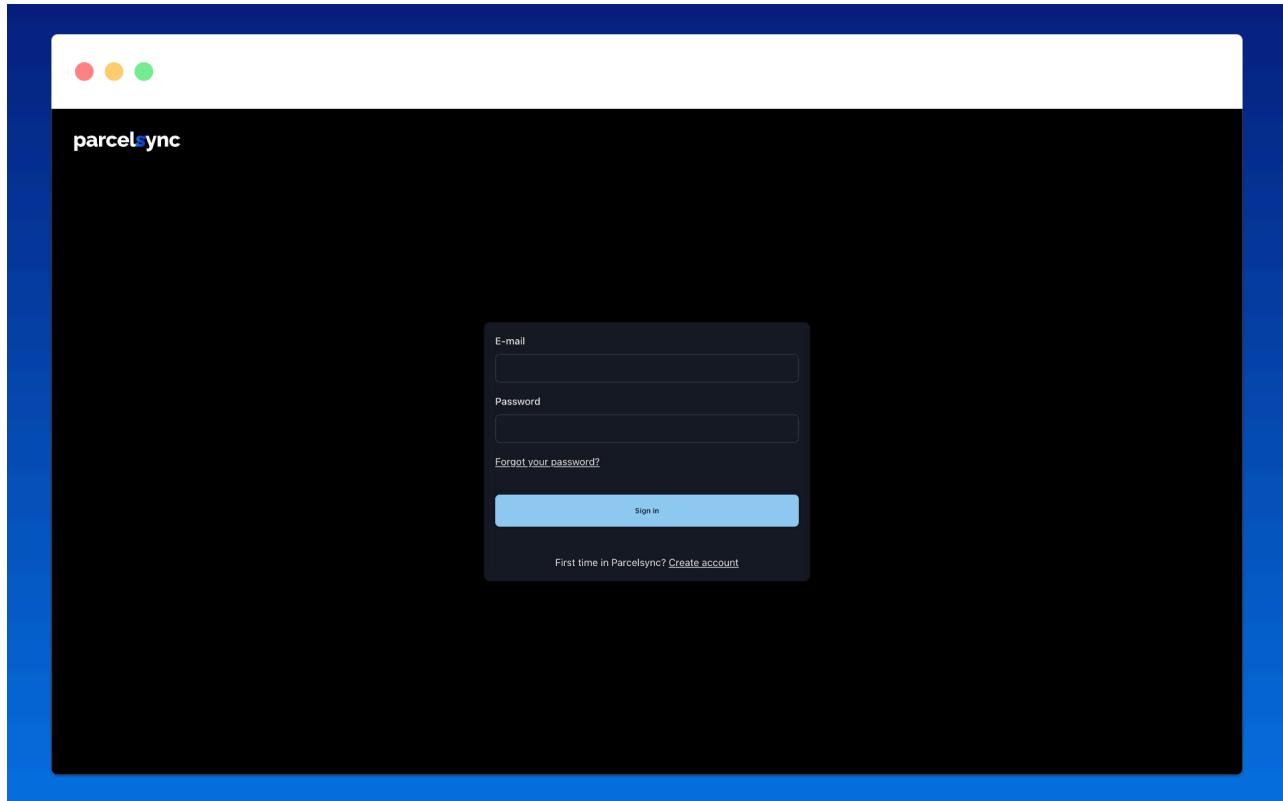
Getting Started

Now that you've learned what Parcelsync has to offer, it's time to get to work. The following steps will guide you through the basic setup of your account, from registration to launching your first project.

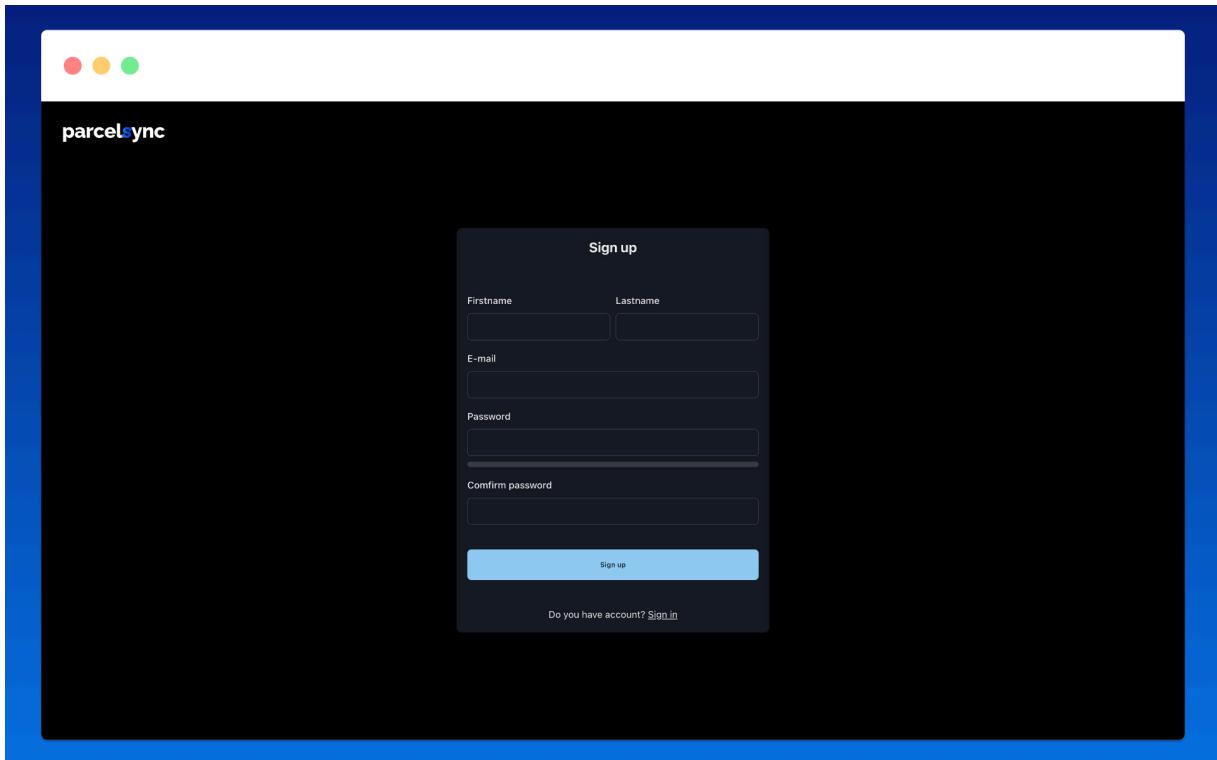
Sign Up

Registration to Parcelsync is very simple. Let's take a look at how to do it.

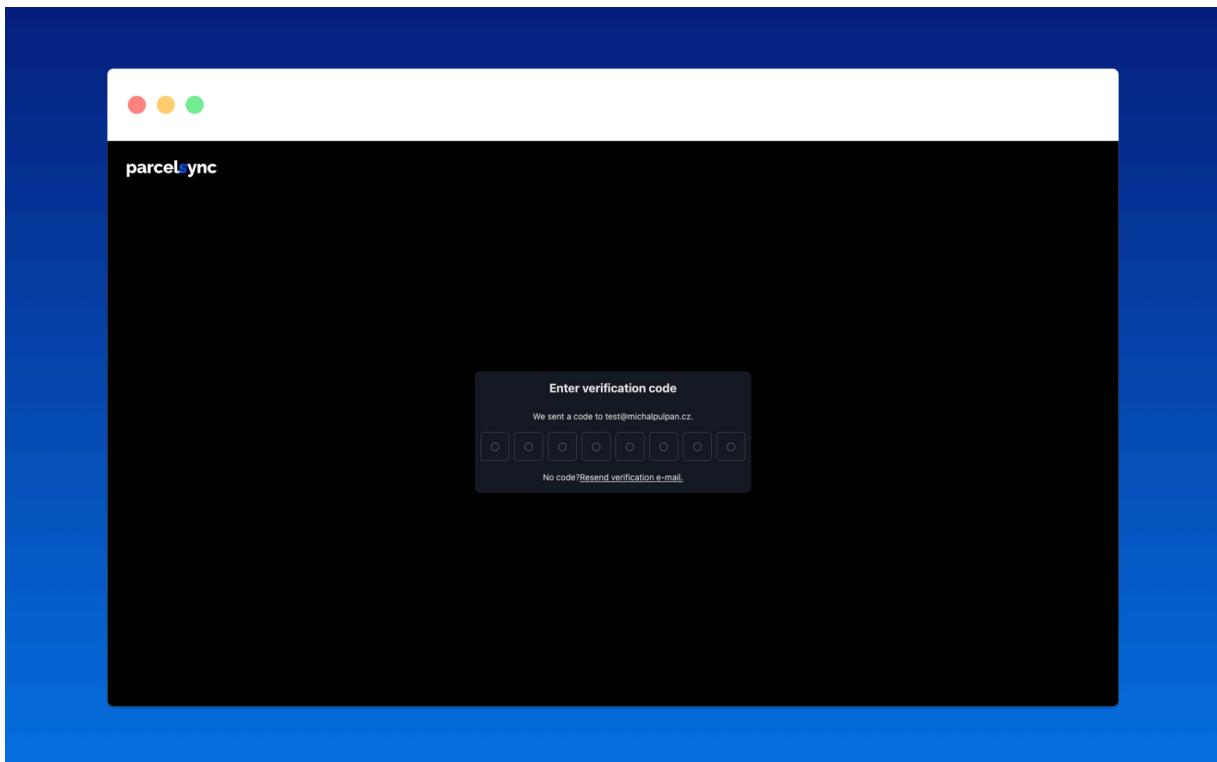
1. Open your web browser and go to <https://app.parcelsync.io>.



2. Click on Create new account and fill in the form with your e-mail address and password.



3. Confirm your e-mail address by entering the code you received in your e-mail.



Choosing a subscription plan

At the moment, we offer 3 types of subscriptions: Basic, Plus and Premium. Each of them has its own benefits and limitations. You can find the current prices and benefits on our website in the [Onboarding](#) section.

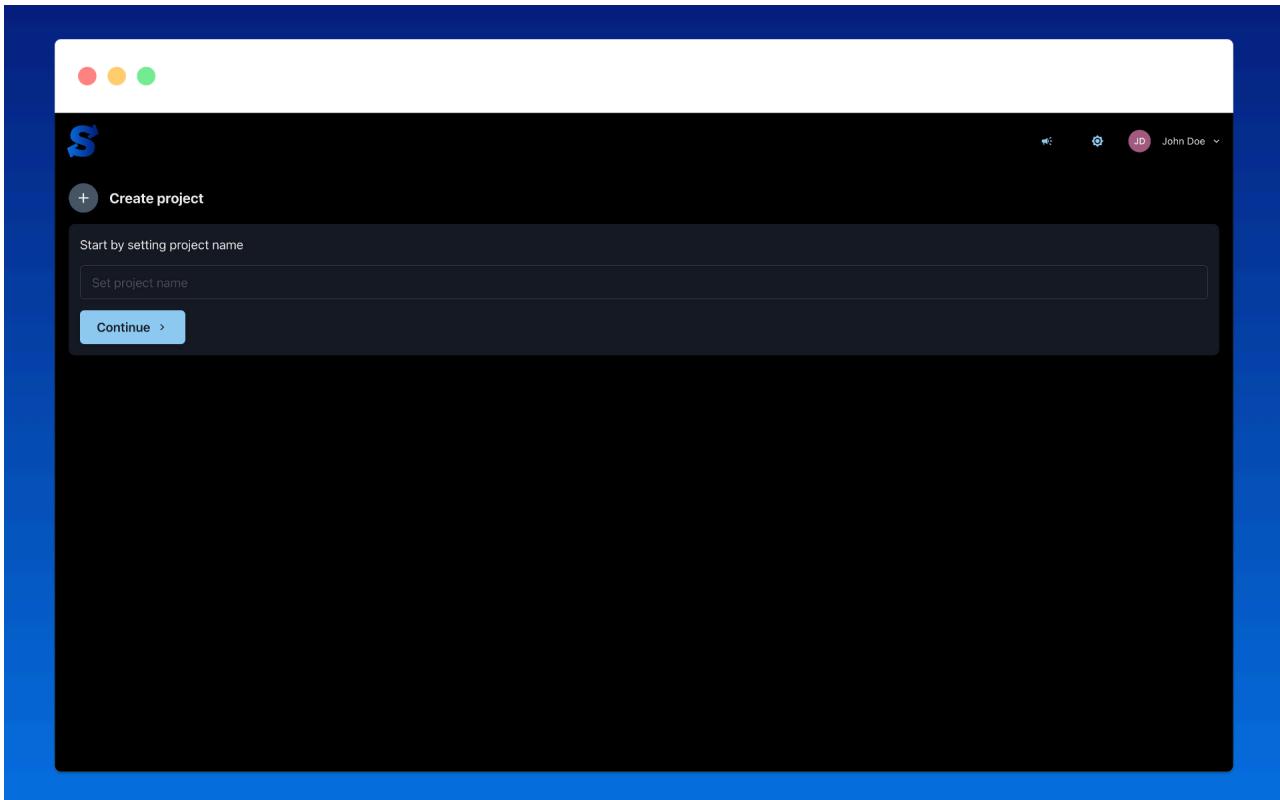
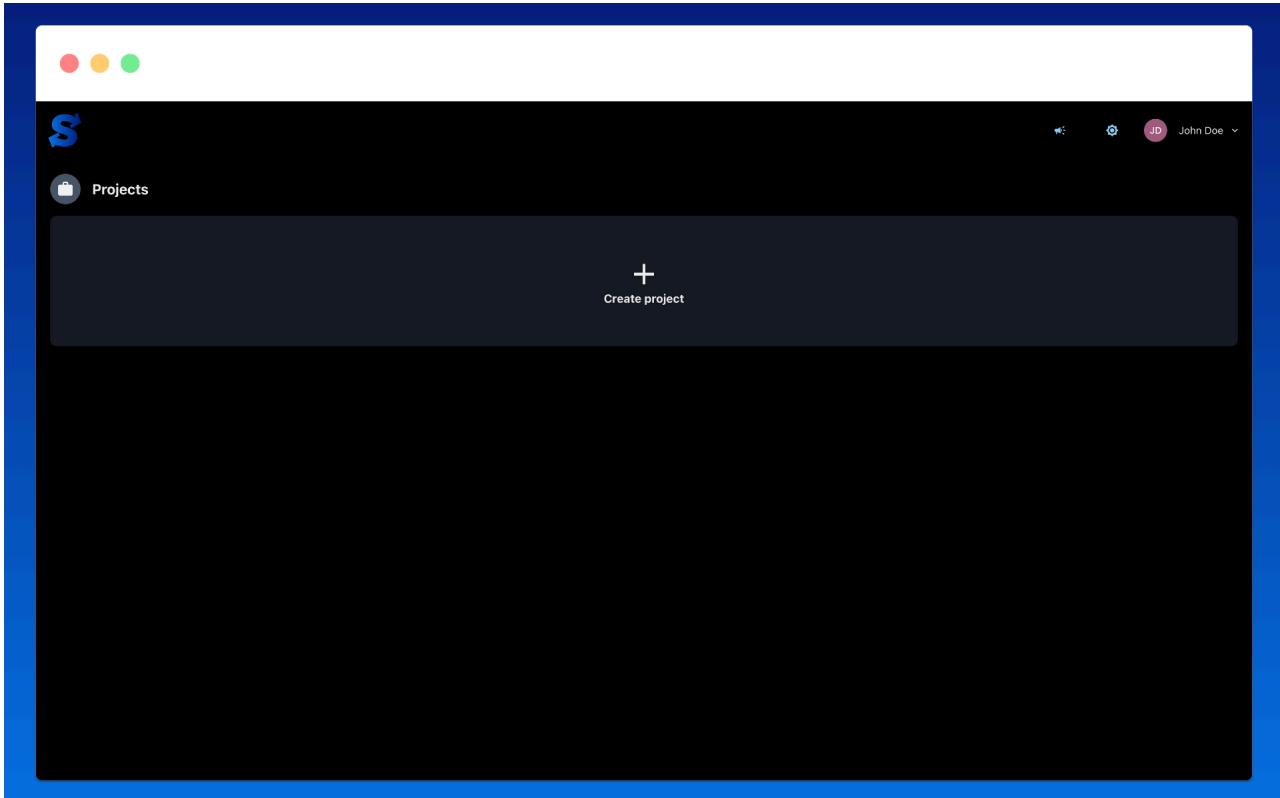
Creating a project

- [Creating a project](#)
 - [Creating your first project](#)
 - [Creating additional projects](#)

Projects in Parcelsync are the basic building block of your account. Each project can have its own settings, members, subscription, and API key. You can use projects to differentiate between different warehouses or customers, for example. The ability to create multiple projects may vary depending on your subscription. If you are interested in creating additional projects, please contact us.

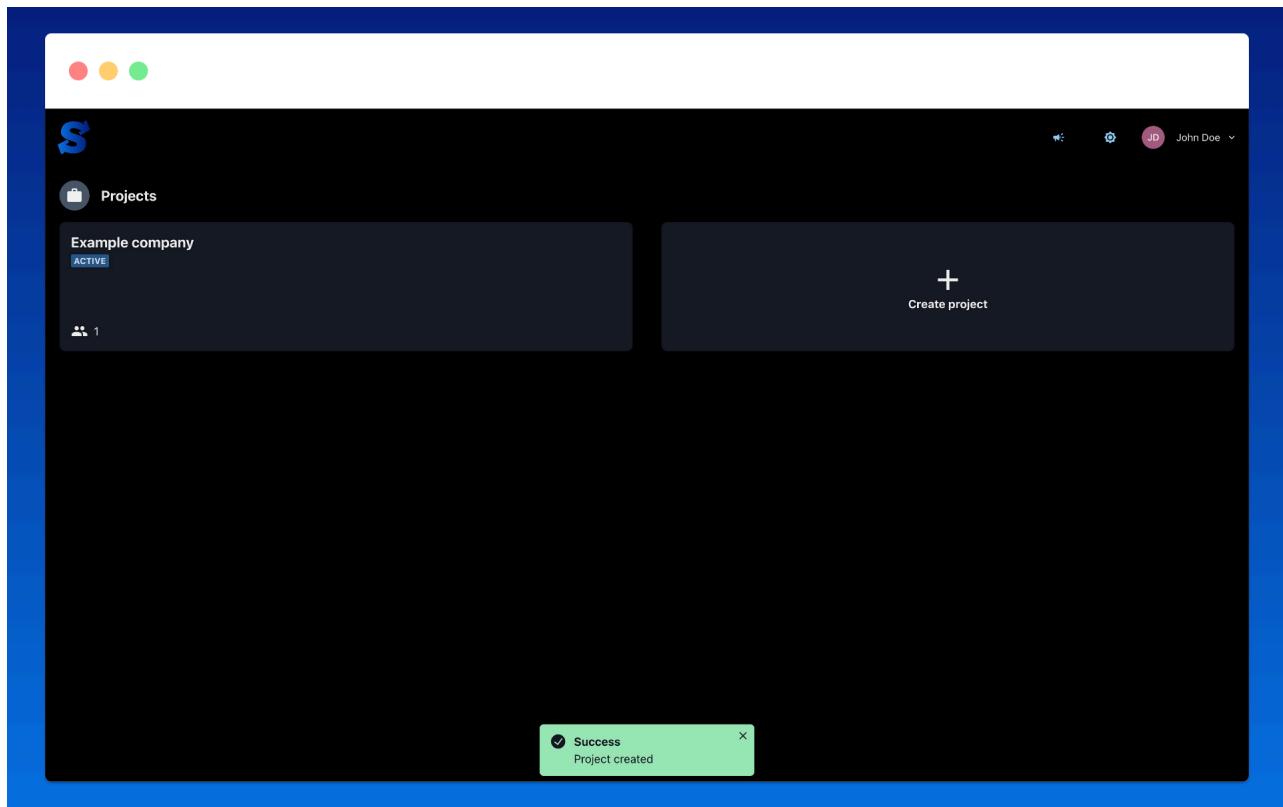
Creating your first project

The first page you will see after logging in is a list of your projects. If you are a new user, the list will be empty. Click the "Create project" button and fill out a simple form with the name of your project.



Creating additional projects

Creating additional projects may be limited by your subscription. To create another project, simply click on the name of your current project in the bottom left corner. Here you will see a list of all your projects and you can create a new project by clicking the "Create project" button, just like in the previous step.



Invitations

- [Invitations](#)
 - [How to invite a user](#)
 - [Changing user role](#)

Invitations are a way to add new users to your team. Every user that is part of your team must be invited and must accept the invitation. Only users with an account in Parcelsync can be added to the team. If the user does not have an account, they will be prompted to create one when they accept the invitation.

How to invite a user

Go to your project to which you want to invite a user. Click on the "Users" tab in the left menu. Here you will see a list of all users including their roles that you have already added and you can create a new invitation by clicking on the user icon in the top right.

The screenshot shows the Parcelsync web application interface. On the left, a sidebar menu includes 'Dashboard', 'Shipments', 'Users' (which is currently selected), and 'Settings'. The main content area is titled 'Users' and displays a message: 'Great! Share the following one time link with the user you want to invite. The link is valid for one hour.' followed by a URL: <https://app.staging.parcelsync.io/invitations/3d2a9b39-6736-4021-89e5-8f72fc61194>. Below this, a table lists a single user: John Doe (test@michalpulpan.cz) with a role of 'Owner'. At the bottom right of the table, there is a red 'Smazat' (Delete) button. The footer of the page shows 'Example company'.

This screenshot shows the same Parcelsync application interface, but the 'Users' table now contains two entries: John Doe (jdoe@michalpulpan.cz) with a role of 'Majitel' and Jane Doe (janedoe@michalpulpan.cz) with a role of 'Člen'. A red 'Smazat' (Delete) button is visible at the bottom right of the table. The footer shows 'Example company'.

Changing user role

User can be left in the default role of "Member". Member can read and write data in the project. However, they cannot change project settings, invite other users or delete data. If you want, you can promote the user to "Admin". Admin can do everything a member can, but additionally can change project settings, invite other users and delete data. The highest role is "Owner". Owner is the one who created the project and can do everything an admin can, but additionally can delete the project.

Setting up a project

Before you start working with shipments in your project, it is important to make a few basic project settings. This part of the documentation will show you how to do it.

Key settings include:

- [Setting up carriers](#)
- [Setting up shipper](#)
- [Setting up sellers](#)

Setting up carriers

- [Setting up carriers](#)
 - [Carriers](#)
 - [PPL](#)
 - [Czech Post](#)
 - [Packeta](#)

In order to create a shipment and send it through the selected carrier, you must first set up the carriers you want to work with. The setup is basically entering the API access credentials of the carrier that Parcelsync uses to create shipments and track shipments using your account that you have created with the carrier or that has been assigned to you (e.g. after signing a contract with the carrier).

Carrier settings can be found in the left menu under "Settings" -> "Carrier settings".

Carriers

List of carriers is constantly expanding. Below is a list of carriers you can work with and set up in Parcelsync. If your carrier is not in the list, do not hesitate to contact us and we will try to add your carrier to Parcelsync.

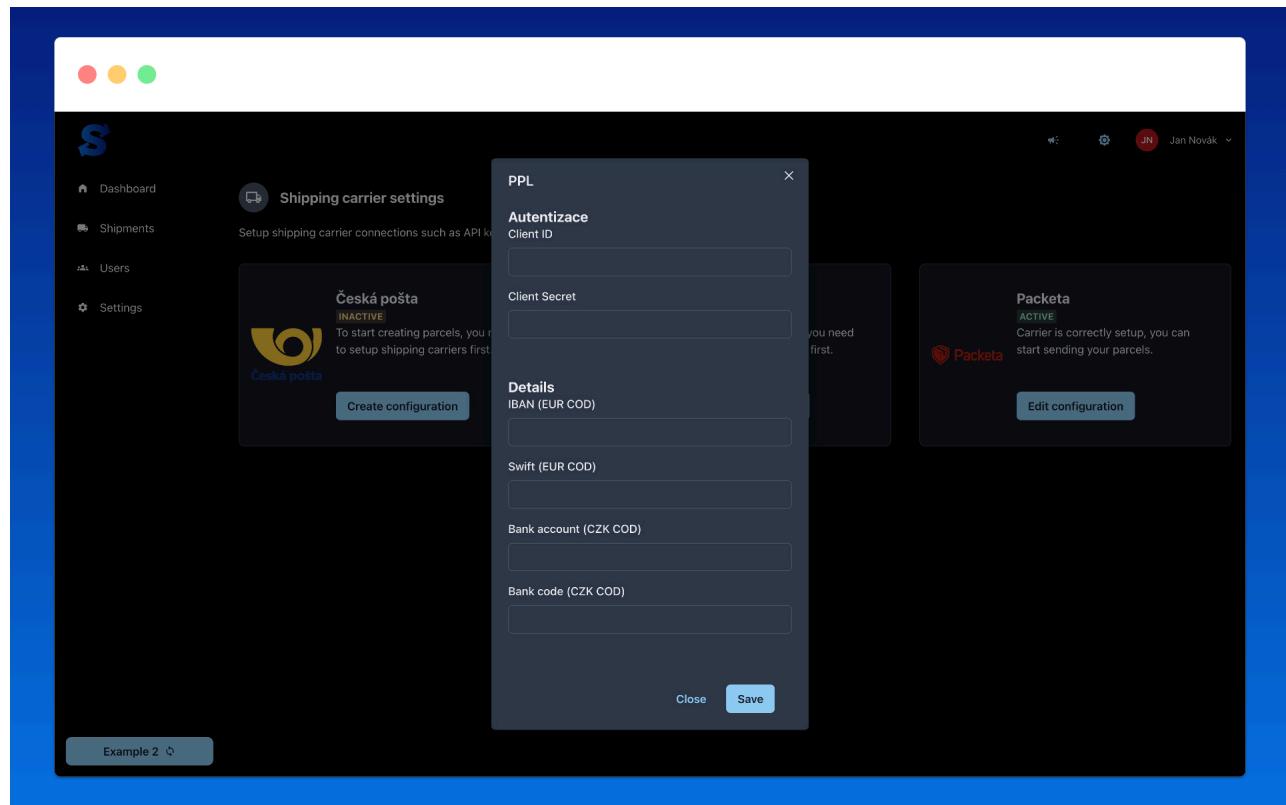
PPL

To setup PPL click on "Create configuration" in the PPL tab. A form will appear where you fill in the API access credentials for PPL. You will get the authentication data from your PPL sales representative:

- Client ID
- Client Secret

Then in the second part, you need to fill in the sender's details that PPL requires:

- **IBAN, SWIFT (to be filled in only if you want to use the cash on delivery service in EUR)**
- **Bank account, Bank code (to be filled in only if you want to use the cash on delivery service in CZK)**



Czech Post

To setup Czech Post click on "Create configuration" in the Czech Post tab. A form will appear where you fill in the API access credentials for Czech Post. To get access to the API, you need to contact your Czech Post sales representative. The sales representative will help you with registration, initial setup, and grant rights.

After you have access to your account, you can log in to [Pošta Online](#). In the "Services for companies" tab, you will find access to the B2B profile management, where you can

create and change keys that need to be used to encrypt the request that will be sent to the API.

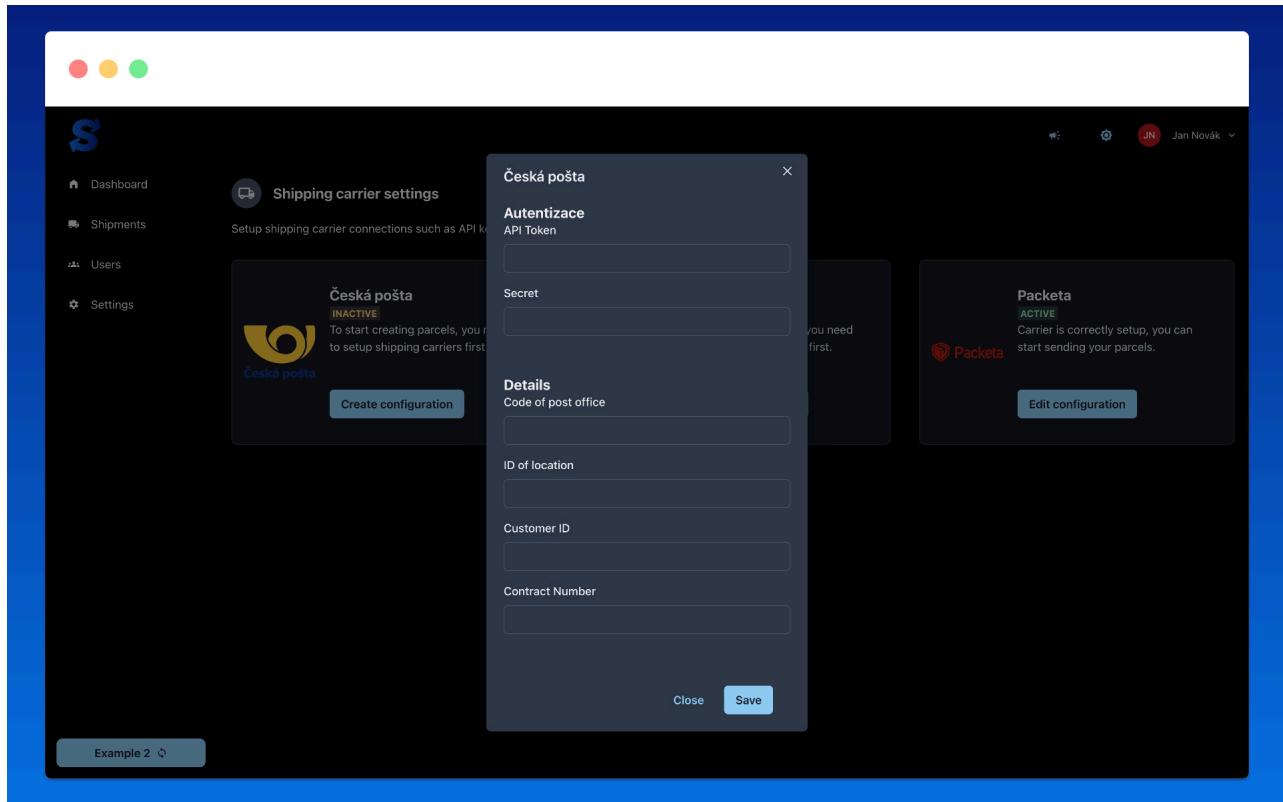
(Using the test accounts of the Czech Post in Parcelsync is not supported and the data transfer will not work.)

Authentication data that needs to be filled in the form:

- **API Token - API key generated in B2B profile**
- **Secret - Secret key generated in B2B profile for given API key**

After filling in the authentication data, you need to fill in the sender's details that Czech Post requires

- **Post code - Code of post from where your shipments will be shipped, again you can get this information from your sales representative.**
- **ID of location - ID of the location (company/warehouse) from where your shipments will be shipped, again you can get this information from your sales representative.**
- **Customer ID - Customer ID, which you have with Czech Post, again you can get this information from your sales representative.**
- **Contract Number - Contract number, which you have with Czech Post, again you can get this information from your sales representative.**



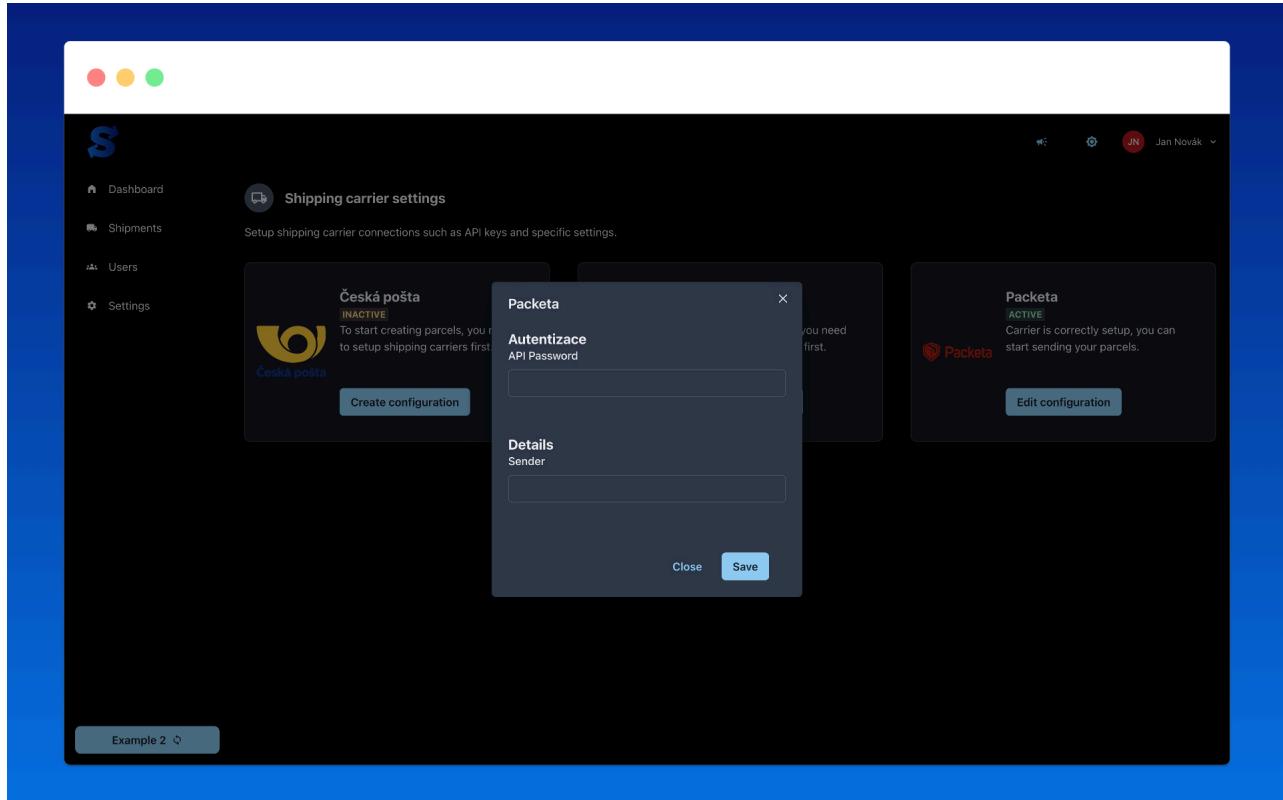
Packeta

To setup Packeta click on "Create configuration" in the Packeta tab. A form will appear where you fill in the API access credentials for Packeta. Authentication data that needs to be filled in the form:

- API Password - API key can be obtained in the environment [Packeta](#)

After filling in the authentication data, you need to fill in the sender's details that Packeta requires:

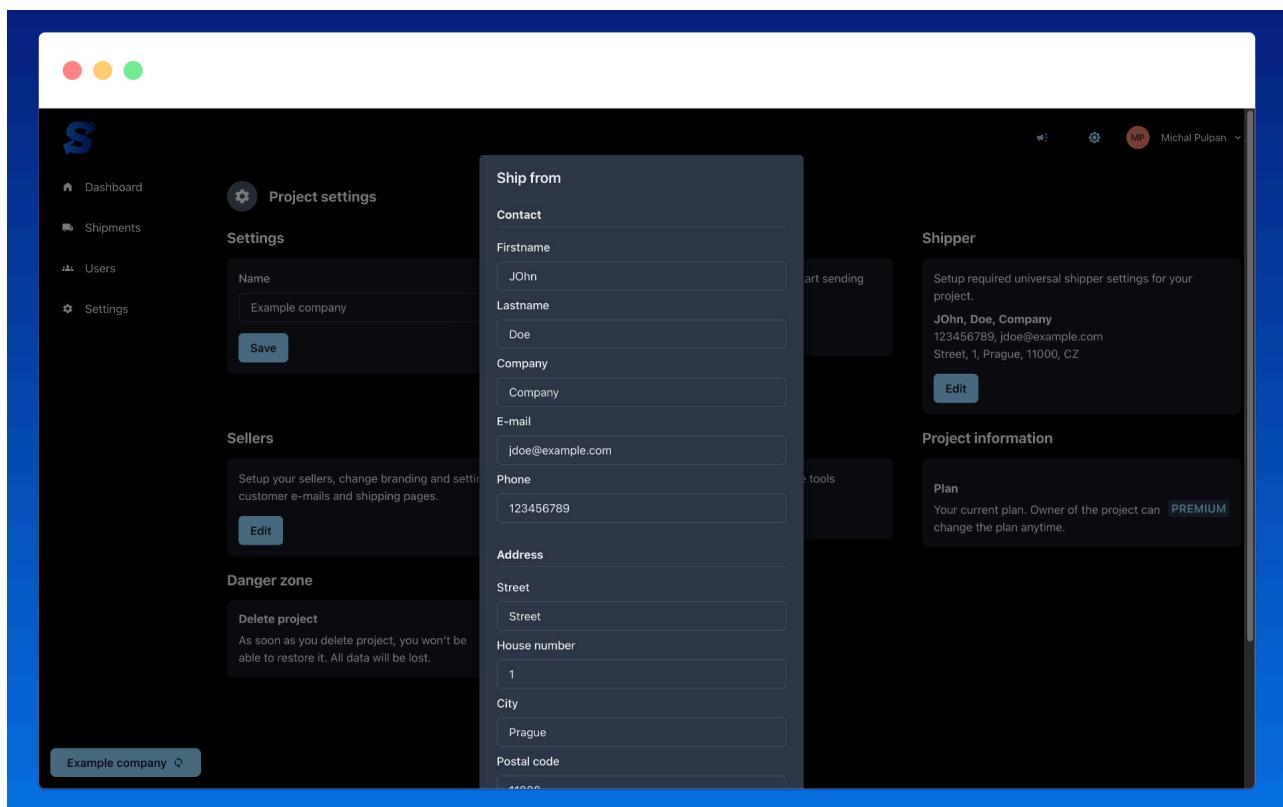
- Sedner - Name of the sender (company/warehouse) from where your shipments will be shipped. This information can be obtained from your sales representative.



Universal Shipper

After creating a connection to a carrier, it is important to set a universal shipper. This shipper will be used for all shipments in the project. It's mandatory to provide a shipper, some carriers require you to provide your contact details with the shipment. Thanks to the shipper, you can set it uniformly and easily.

You can find the shipper settings in the left menu under "Settings" -> "Shipper" and click on "Edit".



Sellers

- **Sellers**
 - [How to create a seller](#)
 - [How to edit a seller](#)
 - [How to set up branding for the seller and communication](#)
 - [Web / E-mail](#)
 - [Setting up e-mail notifications](#)

Sellers are an important part of your project. They allow you to set up communication with the customer and branding for different shipments. At the project level, you can create sellers that will be used for sending shipments (may vary depending on the selected subscription).

Thanks to the seller, you are able to set how your tracking page and e-mail for the customer will look, what notifications will be sent, and in what language the communication will take place.

How to create a seller

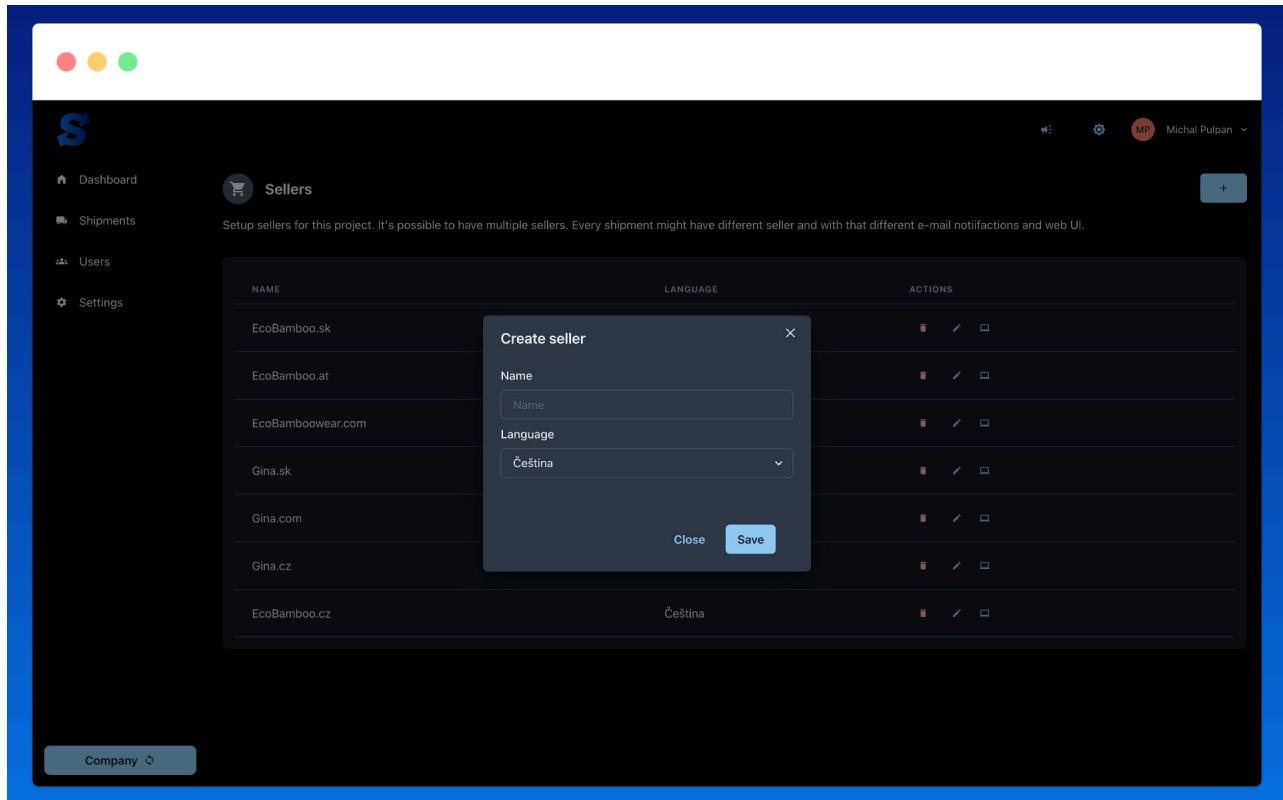
To create a seller, go to the left menu to the "Settings" -> "Sellers" section and click on "Edit". You will see a list of all sellers you have already created and you can create a new seller by clicking the "Create seller" button.

The screenshot shows a dark-themed application window titled 'Sellers'. On the left is a sidebar with icons for Dashboard, Shipments, Users, and Settings. The main area has a title 'Sellers' with a subtitle: 'Setup sellers for this project. It's possible to have multiple sellers. Every shipment might have different seller and with that different e-mail notifications and web UI.' Below this is a table with columns: NAME, LANGUAGE, and ACTIONS. The table lists seven sellers:

NAME	LANGUAGE	ACTIONS
EcoBamboo.sk	Slovensky	[Edit]
EcoBamboo.at	Deutsch	[Edit]
EcoBamboowear.com	English	[Edit]
Gina.sk	Slovensky	[Edit]
Gina.com	English	[Edit]
Gina.cz	Čeština	[Edit]
EcoBamboo.cz	Čeština	[Edit]

At the bottom left is a button labeled 'Company' with a dropdown arrow.

After clicking the "Create seller" button ("+" in the top right corner), a form will appear where you fill in all the languages of communication and the name of the seller (which you will then use when creating shipments).



How to edit a seller

After creating the seller, you will see a list of all sellers you have already created. By clicking the "Edit" button on the seller's row, a form will appear where you can change the language of communication or the name.

How to set up branding for the seller and communication

To set up branding for the seller and communication, click on the "Edit UI" button on the seller's row. A form will appear where you can set the branding for the seller and communication.



After clicking the button, a form will appear where you can set the colors, logo, and texts for the seller. By changing the color mode of the administration (dark mode/light mode), you also change the display of the tracking page for the customer as they will see it in that mode. If you do not want to enable dark mode, you can turn it off in the seller's settings and the customer will not see it.

The screenshot shows the 'Custom UI' configuration for a seller. On the left, there are fields for 'Title' (EcoBamboo) and 'Primary color' (#729A15). Below these are sections for 'Logo (for light background)' and 'Logo (for dark background)'. The 'Logo (for light background)' section displays a logo for 'eco BAMBOO' with a green leaf icon. The 'Logo (for dark background)' section shows a placeholder area with a green leaf icon. In the center, a preview window shows a tracking page with the 'eco BAMBOO' logo and a green checkmark icon inside a circle. At the bottom of the preview, the text 'Zásilka doručena, děkujeme!' is visible. At the very bottom, there is a footer for 'Packeta' with tracking numbers and a page number '1'.

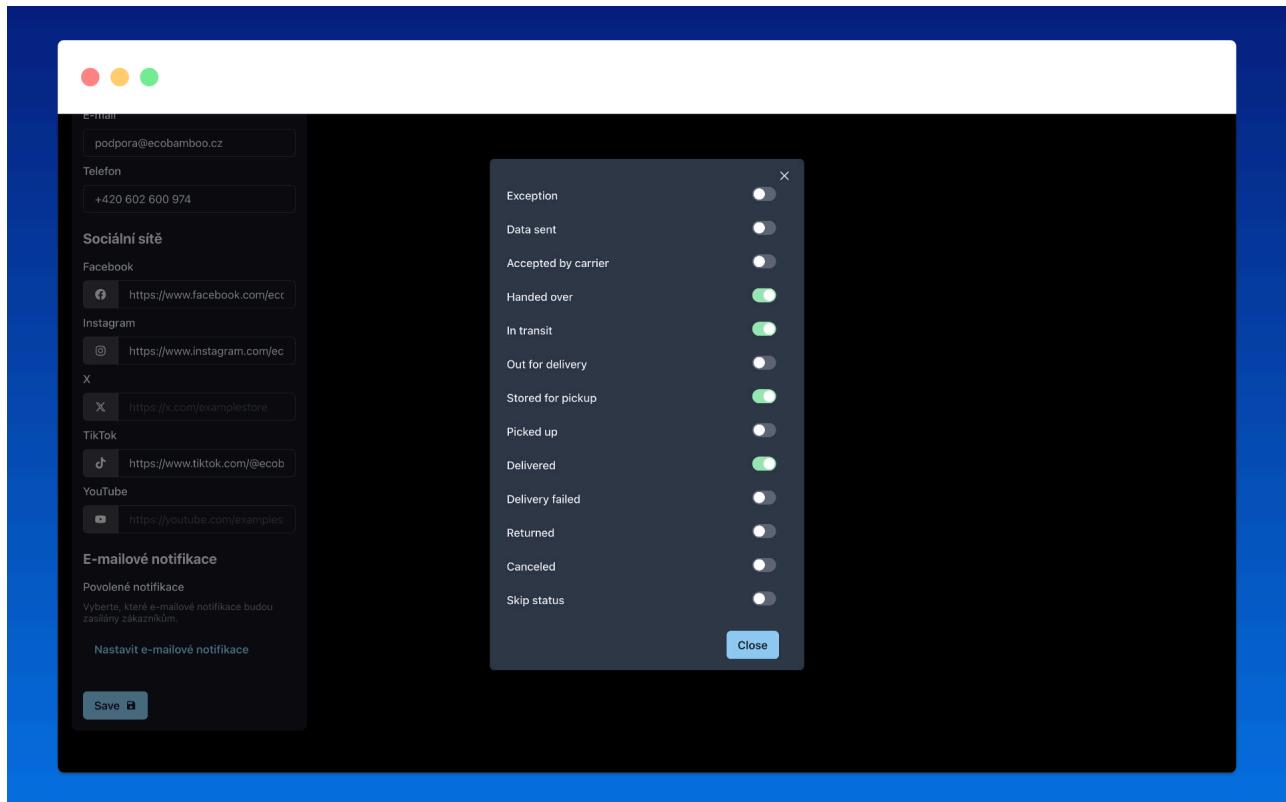
Web / E-mail

Additionally, you can set up the texts for the tracking page and e-mail communication. You can also switch between web and e-mail display in this form. The settings are shared

for both communications, but you can see how the e-mail and web will look.

Setting up e-mail notifications

Seller can also have e-mail notifications set up. You can set up the e-mail notifications in the "E-mail notifications" tab. You can set up the e-mail notifications for the seller for different shipment states. The seller can also have e-mail notifications banned for selected states. You can send a notification e-mail only for selected shipment states (e.g. only for handing over the shipment to the carrier). We recommend setting up notifications so that the customer does not receive unnecessary e-mails, but at the same time is informed about important shipment states.



Shipments

Shipments are a key element in Parcelsync. This part of the documentation will show you how to create, edit, and manage shipments in your project. In Parcelsync, you can create shipments directly within the web administration of the project or via our API. The same can be done with labels, shipment manifests, and other methods.

Parcels

Parcel is a physical object with a label and a tracking number. Within one shipment in Parcelsync, you can create several parcels.

Filters

In the administration of the project, you can filter shipments according to various criteria. For example, by status, carrier, your reference, and the date of creation. You can recognize that filtering is available for a given field by the filter icon next to the field name. Clicking on the field name will display filtering options. For text fields, you can filter by content (e.g. contains, does not contain, starts with, ends with).

S
MP Michal Pulpan

Dashboard
Shipments

Users
Settings

Shipments

	REFERENCE	CARRIER	NAME	E-MAIL	COUNTRY	CASH ON DELIVERY	CREATED	PARCELS	STATUS
<input type="checkbox"/>	53203601	CESKAPOSTA	Joshua Pruitt	leemathew@example.org	CZ		05.03.2024 21:00:58	2	Sent
<input type="checkbox"/>	50459162	CESKAPOSTA	Colleen Ballard	villanuevadylan@example.net	SK		05.03.2024 21:00:49	3	Finished
<input type="checkbox"/>	11112891	PACKETA	Robert Moyer	johsonchristina@example.net	CZ	5369.00 CZK	05.03.2024 20:58:26	3	Imported
<input type="checkbox"/>	95594583	PACKETA	Katelyn Hester	jescobar@example.com	SK	3634.00 EUR	05.03.2024 20:58:01	4	Imported
<input type="checkbox"/>	01128451	CESKAPOSTA	Jon Cruz	bryan80@example.net	CZ	684.00 CZK	05.03.2024 20:50:57	1	Finished
<input type="checkbox"/>	52229060	CESKAPOSTA	Tony Stewart	mitchellclark@example.net	CZ	2233.00 CZK	05.03.2024 20:49:02	3	Sent
<input type="checkbox"/>	62617550	PPL	Michael Hurley	hansonchristopher@example.net	SK		05.03.2024 20:40:38	1	Imported
<input type="checkbox"/>	58295633	PPL	Troy Nguyen	smithtiffany@example.net	CZ	4136.00 CZK	05.03.2024 20:36:04	2	Sent
<input type="checkbox"/>	99998820	PACKETA	Erin Young	zachary37@example.net	SK	3587.00 EUR	05.03.2024 20:35:01	5	Imported
<input type="checkbox"/>	62588643	PPL	Ronald Edwards	richardskeith@example.com	SK	5944.00 EUR	05.03.2024 20:30:05	5	Imported
<input type="checkbox"/>	98065097	PPL	Tanya Roman	reneehunter@example.com	CZ		05.03.2024 20:25:59	4	Imported
<input type="checkbox"/>	95073583	PACKETA	Keith Ross	kpeterson@example.com	SK		05.03.2024 20:23:58	1	Imported
<input type="checkbox"/>	77910301	PPL	Stephanie Brooks	monicapitts@example.org	SK		05.03.2024 20:08:24	3	Finished
<input type="checkbox"/>	63768312	PPL	Jacob Williams	garzajoshua@example.net	CZ	1498.00 CZK	05.03.2024 20:01:50	4	Imported
<input type="checkbox"/>	83470011	CESKAPOSTA	Garrett Johnson	kathrynkelly@example.com	SK		05.03.2024 19:55:47	3	Sent
<input type="checkbox"/>	77723246	CESKAPOSTA	William Graves	sharon08@example.com	SK		05.03.2024 19:51:10	1	Sent
<input type="checkbox"/>	20989698	PACKETA	Keith Murray	joyce51@example.net	CZ	8549.00 CZK	05.03.2024 19:38:50	3	Finished
<input type="checkbox"/>	68250543	PACKETA	Julie Benton	matthewgibson@example.org	SK	9328.00 EUR	05.03.2024 19:33:49	5	Finished
<input type="checkbox"/>	62905442	PPL	George Hill	johnsonjesse@example.org	CZ		05.03.2024 19:31:00	4	Finished
<input type="checkbox"/>	75450441	PPL	Steven Bradley	amanda18@example.org	SK		05.03.2024 19:28:26	4	Finished

Managing and creating shipments

In this section, we will show you how to create, edit, and manage shipments in your project. There are two equivalent options to choose from:

- [User interface](#)
- [API](#)

Shipment statuses

Shipment can be in one of the following states at any given time:

- Imported - The shipment has been imported into Parcelsync. You can edit it.
- Processing - The data file has been sent to the carrier. This state is only valid for selected carriers (Czech Post, PPL). You can edit the shipment and call the "pick up" method.
- Sent - The data file has been sent to the carrier. You can't edit the shipment.
- Error - There was an error during processing. You can edit the shipment. The shipment can't be sent.
- Finished - Shipment has been successfully delivered. You can't edit the shipment. All of its parcels have reached the final state "Delivered" or "Returned" and their statuses are no longer updated (except for the PPL carrier, which assigns the invoice number to the shipment at the beginning of the following month).

User interface

In the user interface, you can find the created shipments in the "Shipments" section.

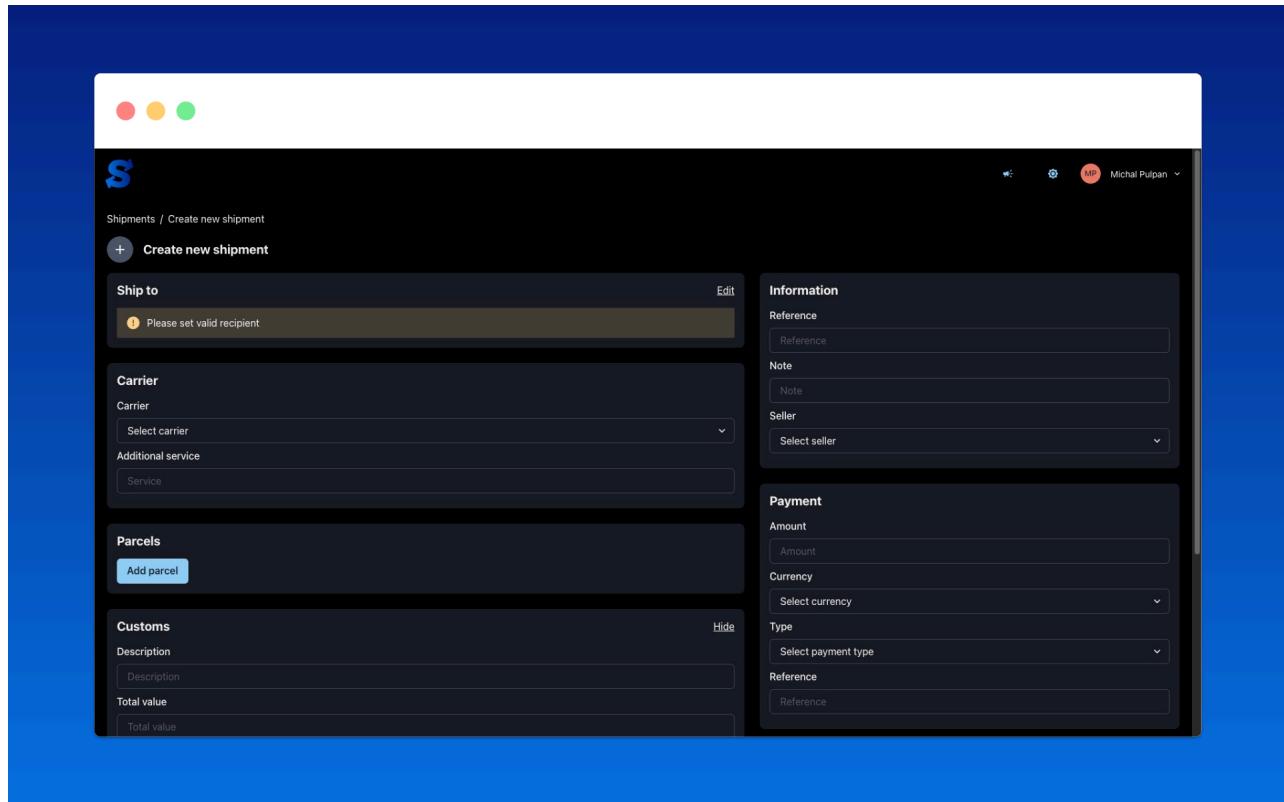
Here you can create, edit, and manage shipments.

Shipment list

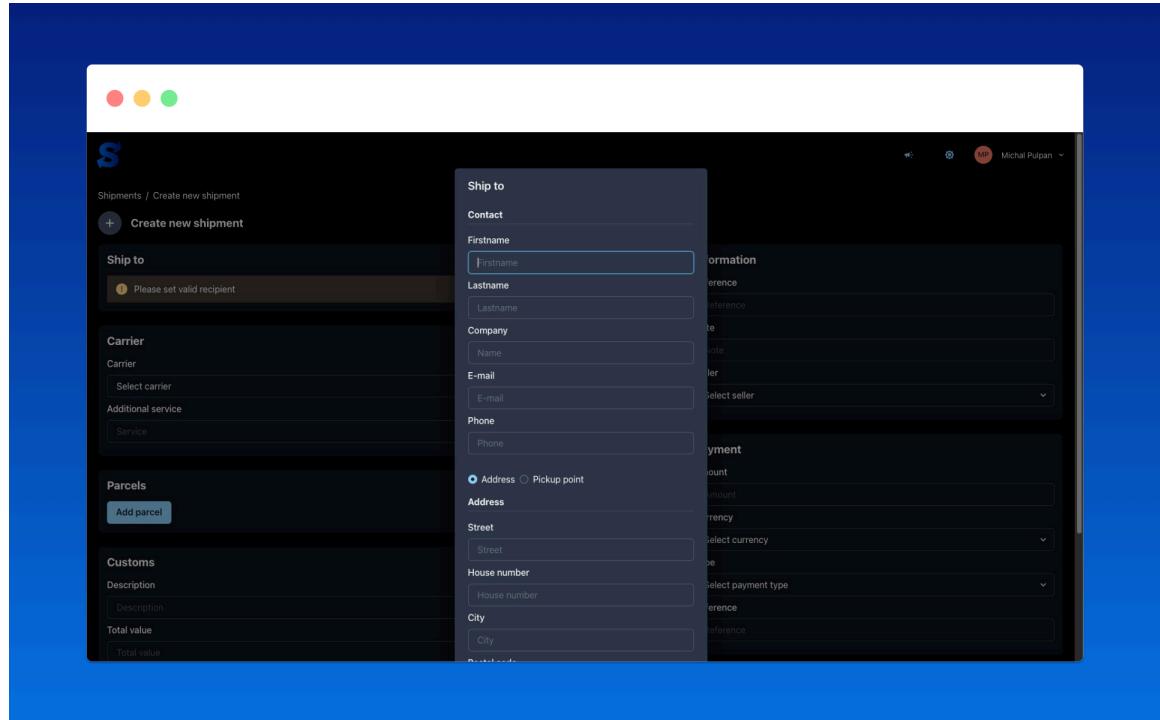
In the list of shipments, you can go to the detail of the shipment, edit it, or delete it.

Creating a shipment

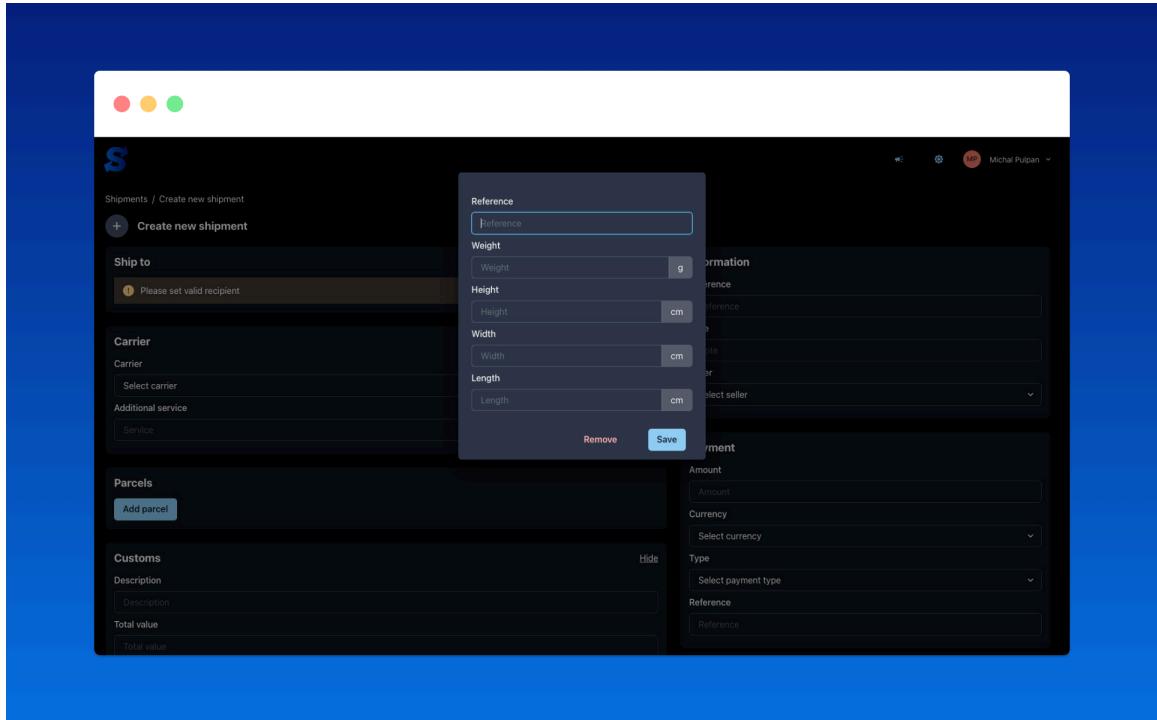
Shipment is created by clicking the button in the upper right corner ("+"). When creating a shipment, fill in the following details:



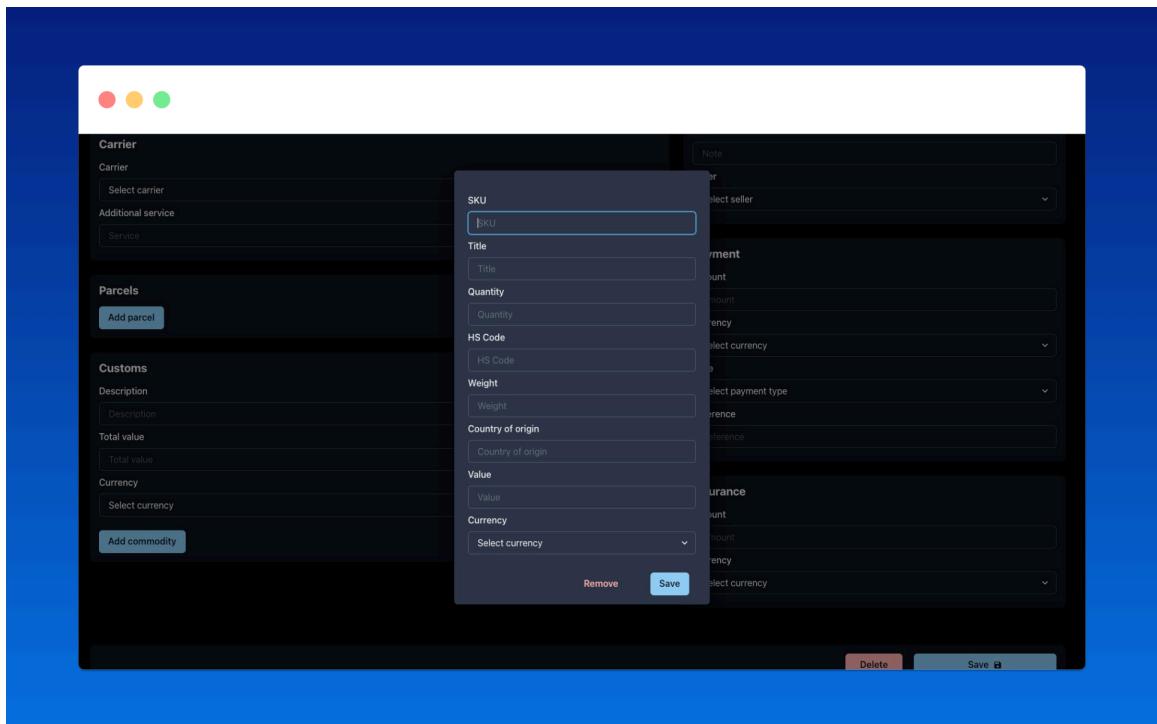
- **Carrier** - Select the carrier you wish to send the shipment with and optionally add additional services for the carrier. Cash on delivery is automatically added if the cash on delivery amount is filled in.
- **Reference** - A unique identifier of the shipment in your system
- **Note** - An optional note about the shipment, if supported by the carrier, it will be displayed on the label
- **Recipient** - Recipient's information
 - including the option to specify either a pick-up point or the recipient's address



- **Packages - Creation of packages that will be part of the shipment**
 - **Parcelsync supports creating several packages within one shipment. For example, when you have an order with multiple items that you do not want or cannot send in one shipment, multiple packages can be created and sent separately (with different tracking numbers).**



- **Customs control - If you are sending a shipment outside the EU, it is necessary to fill in customs information**



- **Payment - Here you fill in the payment details for the order. It is necessary to select**

the type of payment (cash on delivery/prepaid) so that the customer can see the payment status for the order on tracking.

- The "Reference" field is used to identify the payment in your system when paying out the cash on delivery.

The screenshot shows a dark-themed user interface for a payment form. At the top, it says "Payment". Below that are fields for "Amount" (with a placeholder "Amount") and "Currency" (with a dropdown menu labeled "Select currency"). Under "Type", there is a dropdown menu with three options: "Select payment type" (which is highlighted with a blue background), "Prepaid", and "Cash on delivery". At the bottom of the form is a field for "Reference".

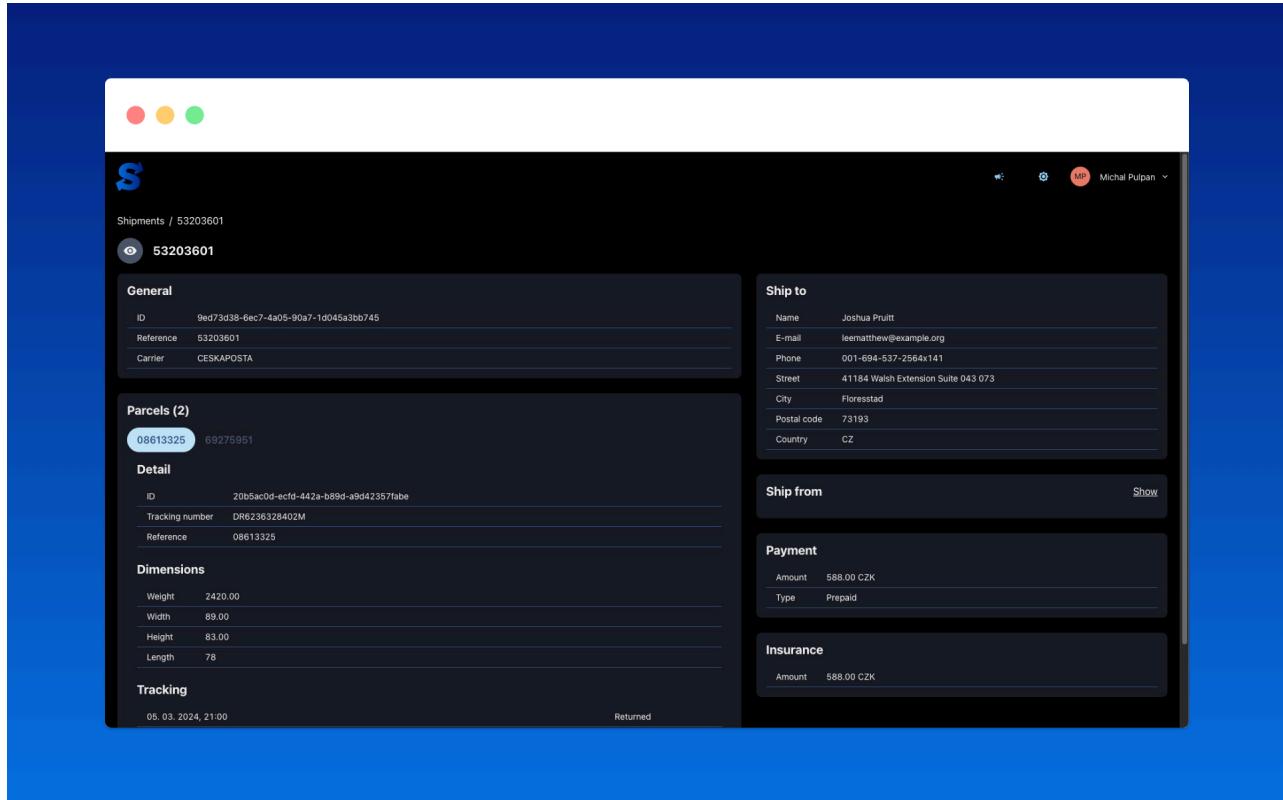
- Insurance - If you want the shipment insured, fill in the insurance details

Editing a shipment

If the shipment is in a state that allows editing (Imported, Processing, Error), you can edit the shipment. After clicking the "Edit" button on the shipment, the shipment detail will appear, where you can edit the shipment in the same way as it was created.

Shipment detail

If the shipment is in a state that allows viewing its detail (Sent, Finished), you can view the shipment. Here you will see all the details of the shipment, including the status of the packages.



API

Creating, editing, and viewing shipments is also possible via the API. For more information, see the [API section in this documentation](#) and the [Swagger API Docs](#)

Generating labels

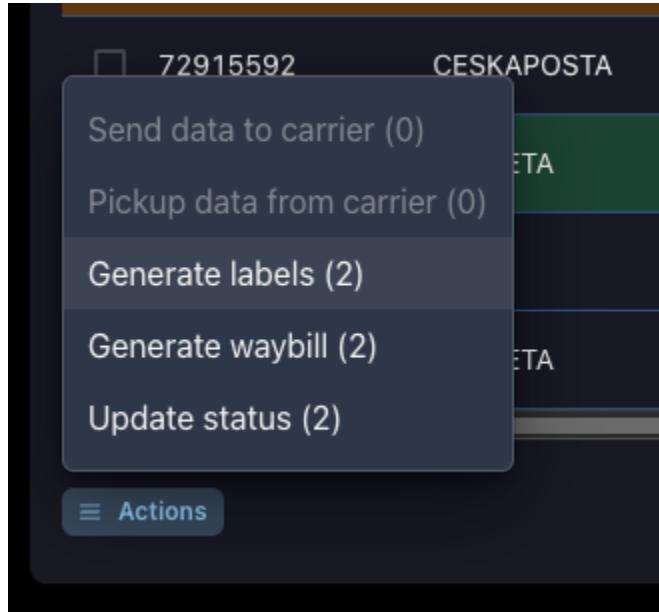
Generating shipping labels is a key element in the shipment process and can be done in several ways. Shipping labels can be generated through the web administration of the project and the API.

You can treat shipments as a homogeneous set regardless of the carrier, or as a heterogeneous set, where each shipment can be from a different carrier. In both cases, it is possible to generate labels for all shipments at once.

User interface

In the user interface, it is possible to generate labels for selected shipments in the shipment list. For more information, see the [Shipments](#) section in this documentation.

You can generate labels only for shipments in the "Sent" status.



After clicking the "Generate labels" button, the labels are prepared and, depending on the

number of selected carriers, a PDF with labels for each carrier is downloaded separately.

API

Generating labels is also possible through the API. For more information, see the [API](#) section in this documentation and the Swagger [API Docs](#). The response is divided into sections according to the carrier, which contain PDFs in base64 format.

Generating consignment list

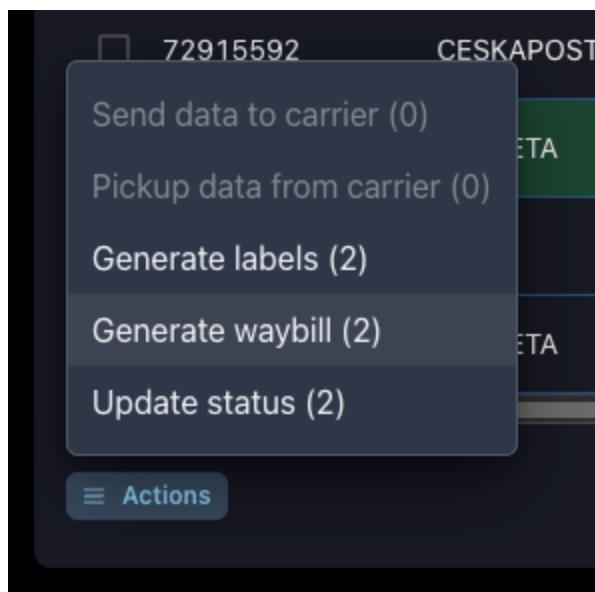
Generating a consignment list is a key element in the shipment expedition and can be done in several ways. Consignment lists are available through the web administration of the project and the API.

You can treat shipments as a homogeneous set regardless of the carrier, or as a heterogeneous set, where each shipment can be from a different carrier. In both cases, it is possible to generate consignment lists for all shipments at once.

User interface

Within the user interface, it is possible to generate consignment lists for selected shipments in the shipment list. For more information, see the [Shipments](#) section in this documentation.

Generating consignment lists is only possible for shipments in the "Sent" status.



After clicking the "Generate consignment list" button, the consignment lists are prepared and, depending on the number of selected carriers, a PDF with consignment lists for each carrier is downloaded separately.

API

Generating consignment lists is also possible through the API. For more information, see the [API](#) section in this documentation and the Swagger [API Docs](#). The response is divided into sections according to the carrier, which contain PDFs in base64 format.

Status update

Updating shipment statuses is a key element in Parcelsync. This part will show you how to access shipment statuses in your project.

Given the data nature of a shipment in Parcelsync, it is important to understand that we only update statuses of parcels included in the shipment (more [here](#)).

Parcels can be in different states, which are updated by carriers. The states parcels can be in are:

- DATA_SENT - Data about parcels has been sent to the carrier
- ACCEPTED_BY_CARRIER - Parcels have been accepted by the carrier
- IN_TRANSIT - Parcels are in transit
- OUT_FOR_DELIVERY - Parcels are out for delivery
- DELIVERED - Parcels have been delivered
- PICKED_UP - Parcels have been picked up
- DELIVERY_FAILED - Delivery failed
- RETURNED - Parcels have been returned
- CANCELED - Parcels have been canceled
- EXCEPTION - Exception occurred

Automatic status updates

Automatic status updates are performed based on information provided by carriers. This information is processed and statuses are converted into a unified [format](#), which is then available through the UI and API. We also store metadata ([metadata](#)) provided by carriers.

PPL metadata

- `services` - field containing services and their prices for a given package (toll, fuel charge, etc.)
- `deliveryFeature` - delivery features (`delivDate` and `delivPerson`)
- `paymentInfo.invoiceNumber` - invoice number

Czech Post metadata

- `postOffice` - code/zip code of the post office where the status occurred
- `postOfficeName` - post office name
- `statusDescription` - description of the status

Packeta

- `isReturning`
- `externalTrackingCode` - external tracking code
- `storedUntil` - date until the package is stored

Getting shipment status by tracking number

For chosen carriers (PPL) it is possible to retrieve status of shipments by tracking number. This status is retrieved directly from the carrier and is available through the API, see [API documentation](#). This way you can get the current status of a shipment that was not sent through Parcelsync.

Tracking e-mail

Within Parcelsync you can send notification e-mails that inform about the status of shipments. For individual shipment statuses (more info [here](#)) you can set whether a notification e-mail should be sent in your seller settings (see [seller settings](#)). E-mails are sent almost immediately after the shipment status is acquired, so the customer is informed in real time.

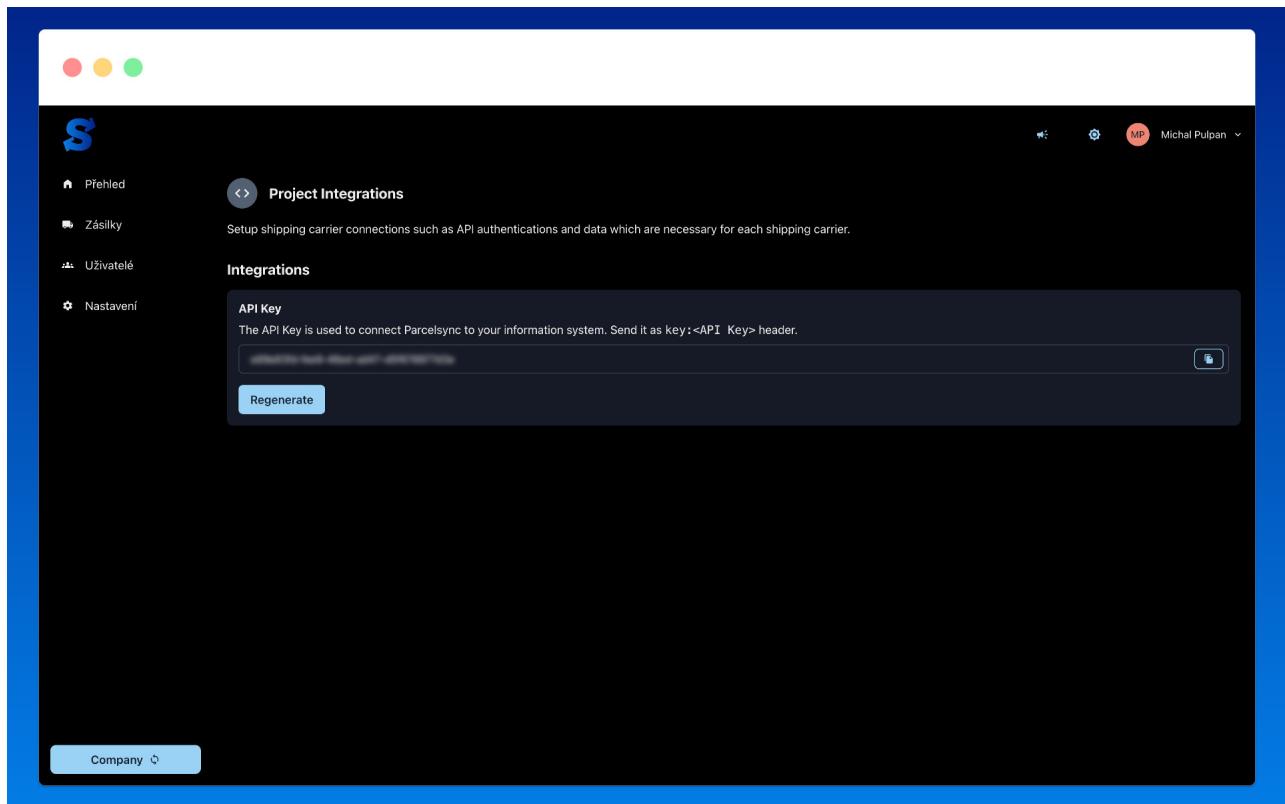
The appearance of the e-mail can be customized in the [seller settings](#).

API

If you want to use the Parcelsync API, you need to have a valid API key for the project.

Generating API key for project

You can create an API key in the project settings in the "Integrations" section. The key can be copied and used in API calls as needed, see [API Docs](#) in the `key` header.



API documentation

Documentation for the API is available at <https://api.parcelsync.io/docs> or <https://api.parcelsync.io/openapi.json> for the OpenAPI specification.