Updating preferences for UPS Paperless® Invoice on ups.com User Guide

4/7/2023

UPS Paperless® Invoice

Overview

A user with a ups.com user ID authenticated to an active UPS 6-digit account number once newly created will be automatically enrolled in **Paperless® Invoice**

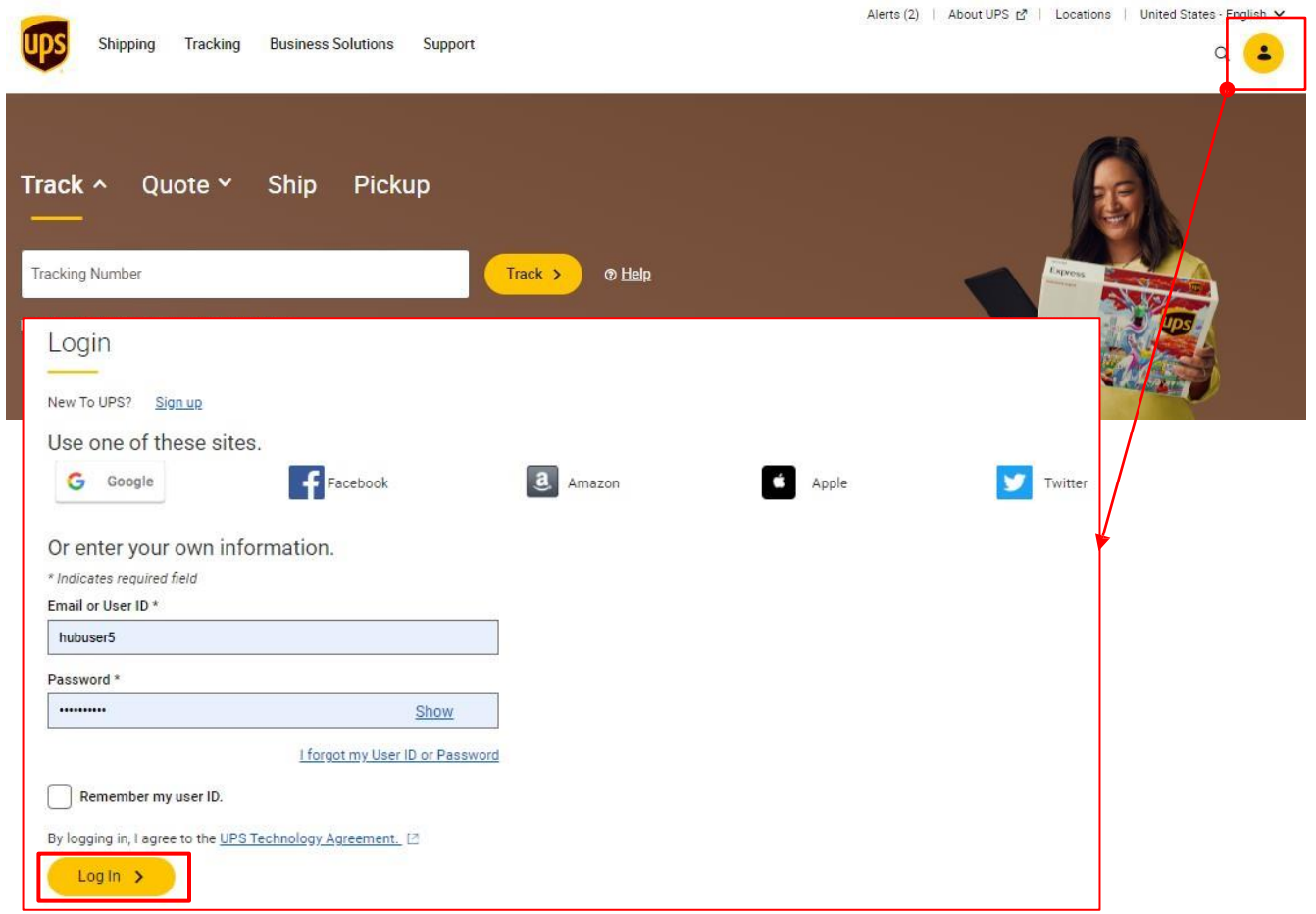
UPS Paperless® Invoice is an application feature that enables the shipper to automatically generate electronic commercial invoices required to clear customs at a destination country that accepts electronic customs documents.

The scope of this document covers instructions on how to update UPS Paperless® Invoice settings on ups.com for countries where self-enrollment is available. Additional information on how to ship with Paperless Invoice and Upload my own customs document on ups.com and WorldShip® are included in the appendices.

Log in

Visit ups.com and select the Login icon on the upper-right hand corner of the page. Enter your user ID and Password credentials then click **Log In**.

If you forget your User ID or password, click **I forgot my User ID or Password** on the **Login** page.



Note: *User IDs and passwords are case sensitive. Three failed attempts to log in will cause your ID to be locked out for 30 minutes.*

Proprietary and Confidential: This presentation may not be used or disclosed to other than employees or customers, unless expressly authorized by UPS.© 2021 United Parcel Service of America, Inc. UPS, the UPS brandmark and the color brown are trademarks of United Parcel Service of America, Inc. All rights reserved.

Checking UPS Paperless® settings

Access the UPS Paperless® settings

Once logged in, under your user drop down menu, select **Accounts and Payment.**

Under **Actions** corresponding to your UPS account number, select **View Account Details**

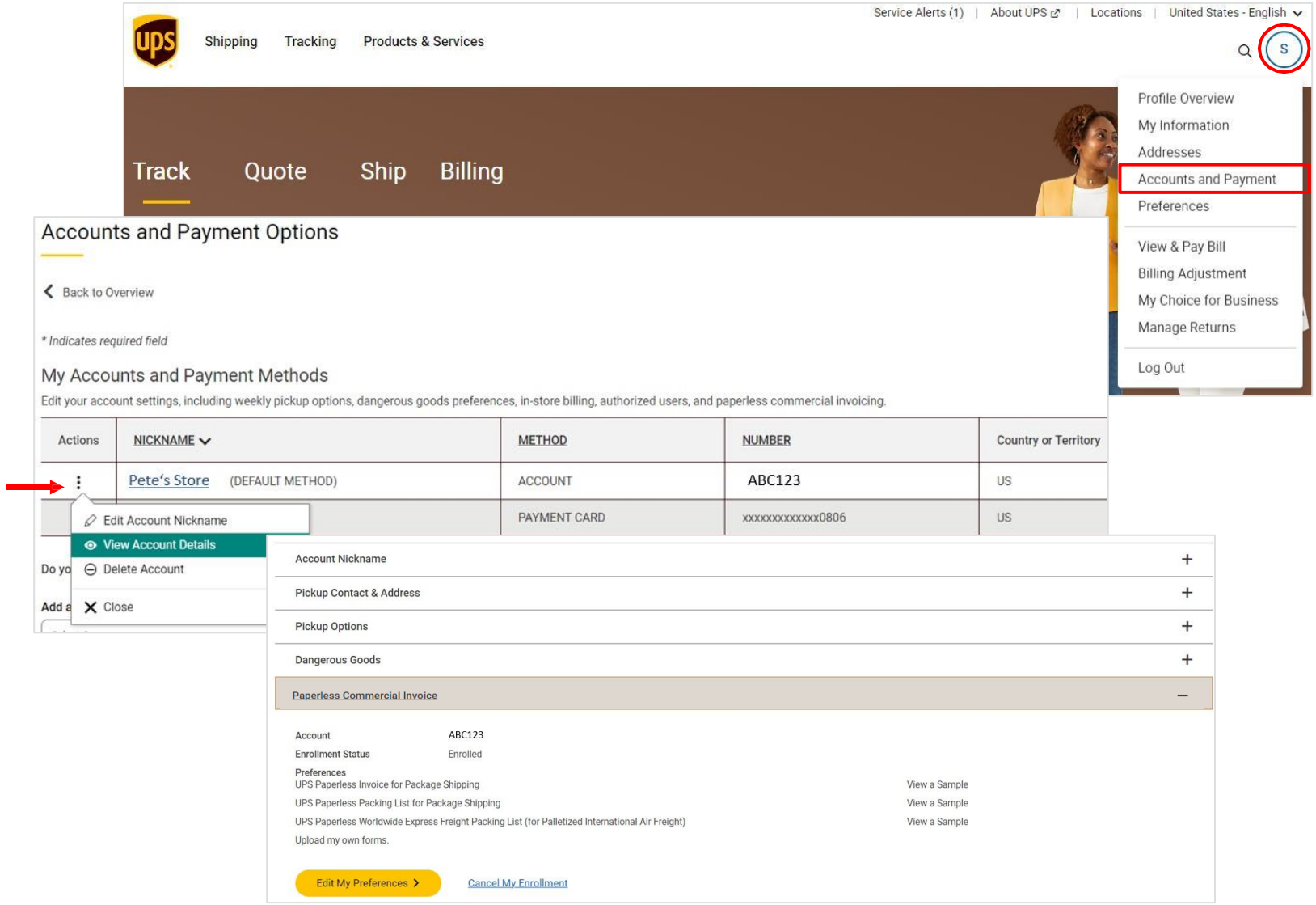
Click on the **+** sign for **Paperless Commercial Invoice.**

The account will show Enrolled status for the following:

- UPS Paperless Invoice for Package shipping
- UPS Paperless Packing List for Package Shipping
- UPS Paperless service for UPS Worldwide Express Freight® (for palletized International air freight)
- Upload my own customs documents

To see shipper views on ups.com using Paperless Invoice and Upload My own customs document, see Appendix A

To see shipper views on WorldShip, see Appendix B



Proprietary and Confidential: This presentation may not be used or disclosed to other than employees or customers, unless expressly authorized by UPS.© 2021 United Parcel Service of America, Inc. UPS, the UPS brandmark and the color brown are trademarks of United Parcel Service of America, Inc. All rights reserved.

Updating UPS Paperless® Invoice settings

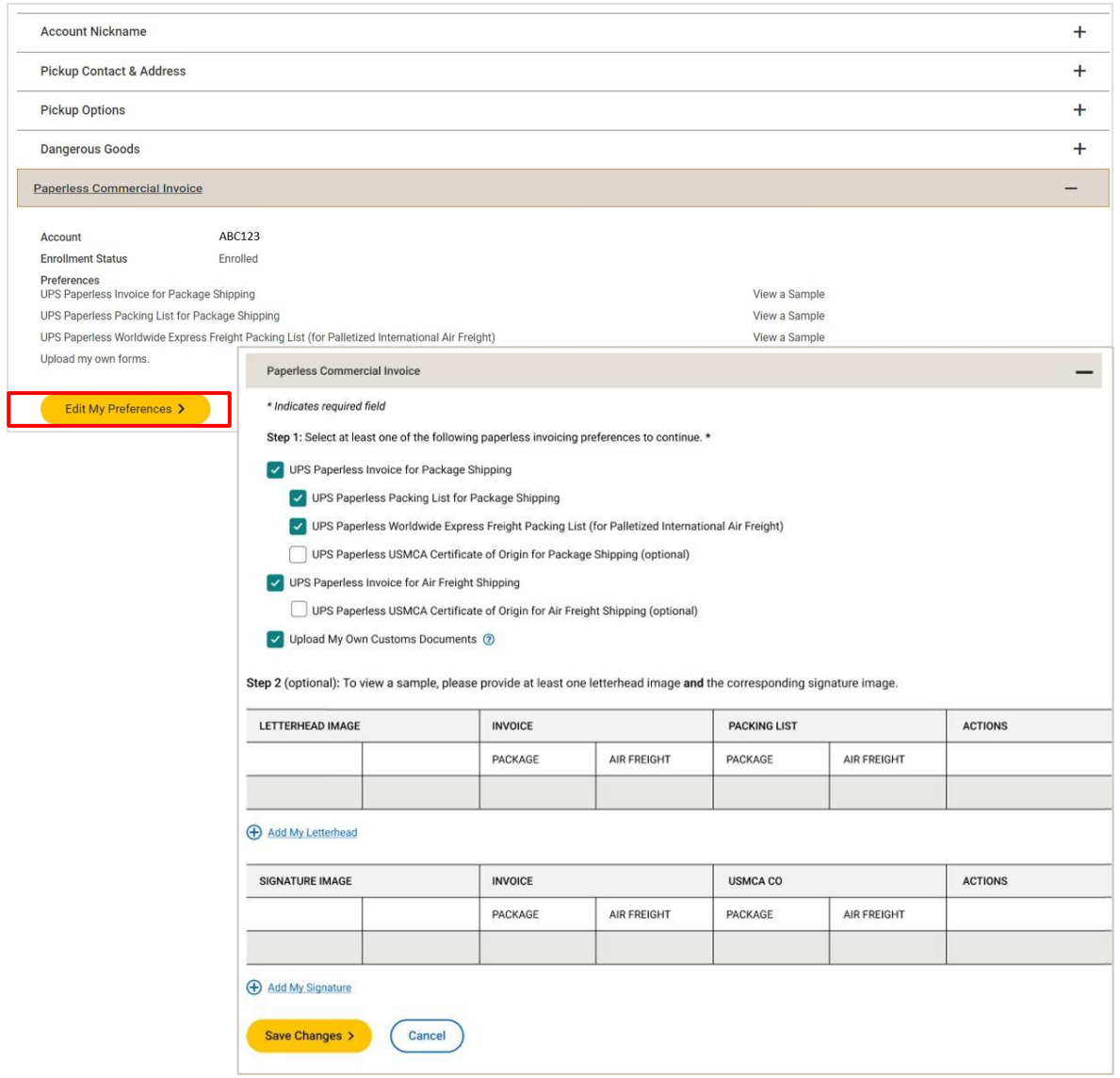
To change UPS Paperless® settings

Follow the same steps on page 2 to access the Paperless Invoice settings page.

Once you are in the **Paperless Invoicing** tab, click on **Edit My Preferences**

Step 1: This section lists all the paperless invoicing settings. You must have at least one of the 3 main options selected.

- **UPS Paperless® Invoicing for Package shipping**: Select this option if you want to enable electronic commercial invoices to be sent digitally to customs when shipping cross border packages <150 lbs.
  - **UPS Paperless® Packing List for Package Shipping**: Checking this option will enable an electronic packing list to be included in the set of documents sent digitally to customs when shipping cross border package <150 lbs.
  - **UPS Paperless® Worldwide Express Freight Packing List**: Checking this option will enable an electronic packing list to be included in the set of documents sent digitally to customs when shipping palletized international air freight
- **UPS Paperless® Invoice for Air Freight Shipping**: Checking this option will enable electronic commercial invoice to be sent digitally



Proprietary and Confidential: This presentation may not be used or disclosed to other than employees or customers, unless expressly authorized by UPS.© 2021 United Parcel Service of America, Inc. UPS, the UPS brandmark and the color brown are trademarks of United Parcel Service of America, Inc. All rights reserved.

Updating UPS Paperless® settings

To change UPS Paperless® settings

Step 1 – continued

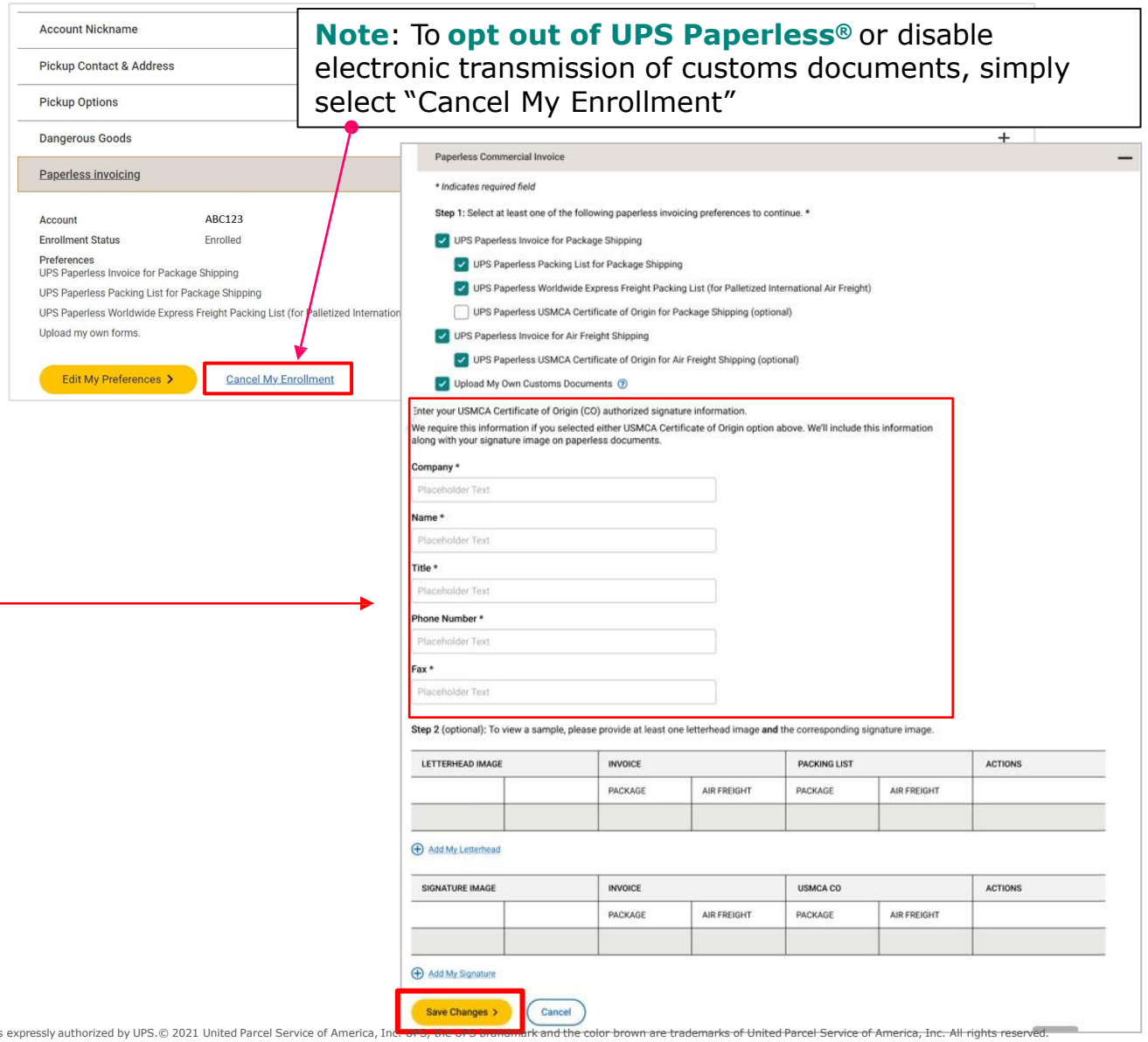
- **UPS Paperless® USMCA Certificate of Origin for package Shipping (optional)**: Checking this option will unhide a form for the shipper to add required fields to be included in the set of electronic documents sent to customs. Applicable in US, MX or CA
- **UPS Paperless® USMCA Certificate of Origin for Air Freight Shipping (optional)**: Checking this option will unhide a form for the shipper to add required fields to be included in the set of electronic documents sent to customs. Applicable in US, MX or CA

- **Upload My Own Customs Documents:** Checking this option will enable the shipper to upload your own commercial invoice or additional shipper-produced electronic documents to be sent to customs. If this option is the only setting enabled, it is the shipper's responsibility to ensure that the destination country accepts electronic customs documents.

Click **Save Changes** once you have updated your Paperless Invoice settings.

Optional Step 2: Uploading letterhead and signature image files are optional and not required. These images if available are used in the creation of the digital commercial invoice. Both letterhead and signature files will be needed should you choose to complete this step.

Note: *It is the shipper's responsibility to know and physically attach original documents to the package if required by the destination country.*



Proprietary and Confidential: This presentation may not be used or disclosed to other than employees or customers, unless expressly authorized by UPS.© 2021 United Parcel Service of America, Inc. UPS, the UPS brandmark and the color brown are trademarks of United Parcel Service of America, Inc. All rights reserved.

THANK YOU