

ShipCompliant



License Portal User Guide

Welcome to ShipCompliant!

Consult this document to learn the features, functionalities, and standard operating instructions for the ShipCompliant License Portal Solution.

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CHAPTER

About This Guide

Overview

This chapter provides the following information:

- [Audience](#)
- [Conventions](#)
- [Support and Service](#)

Audience

This guide is written for users of the ShipCompliant License Portal.

Conventions

This guide may contain the following conventions for formatting text and code examples:

Typeface	Description	Example
<i><Italic></i>	A variable to be replaced by another name or value.	<i><user_name></i>
'Single Quotes'	Information to be input into a field or system.	Enter '123' as the password
"Double Quotes"	Written out message, such as an error or confirmation message.	"Error(s) found upon import"
Code	Any URL or example of code.	Code
Bold	Names of columns, buttons, screen names, and other elements that appear on-screen.	Sovos Parameters
Menu > Item > Selection	Menu item selection.	Organization Administration > Setup > Organization > Legal Entities

Support and Service

If you experience issues or have questions regarding this product, please contact Carrier Compliance Support by clicking the  icon in the upper right-hand corner of any screen.

Instructional Training Video

For an abbreviated video guide of the typical License Portal workflow, see the following link:

<https://www.youtube.com/watch?v=tQYyDG6XMPE>

Using the ShipCompliant License Portal

Overview

This chapter details how to use the ShipCompliant License Portal and includes the following:

- [Logging In](#)
- [Logging Out](#)
- [Viewing Licenses](#)
- [Account Settings](#)
- [Adding Licenses](#)
- [Deleting Licenses](#)
- [Account Settings](#)
- [My Account](#)

Logging In

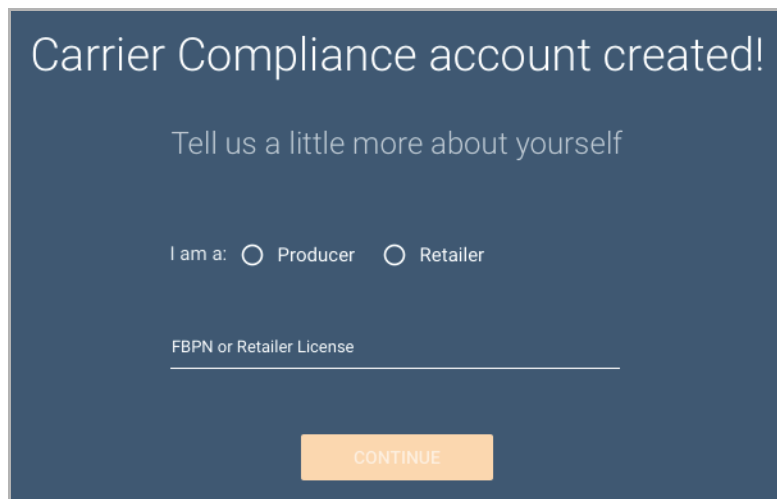
1. To create an account, from the login screen, enter the appropriate information in each field and click **CREATE ACCOUNT**.



The screenshot shows the 'Welcome to ShipCompliant Carrier Compliance' page. At the top is the logo 'shipCOMPLIANT by SOVOS'. Below the logo is the heading 'Welcome to ShipCompliant Carrier Compliance' and the subheading 'Create your new account'. There are three input fields: 'Your Email', 'Password', and 'Retype password'. At the bottom right is an orange button labeled 'CREATE ACCOUNT'.

Note: If already a user, click **Sign In**.

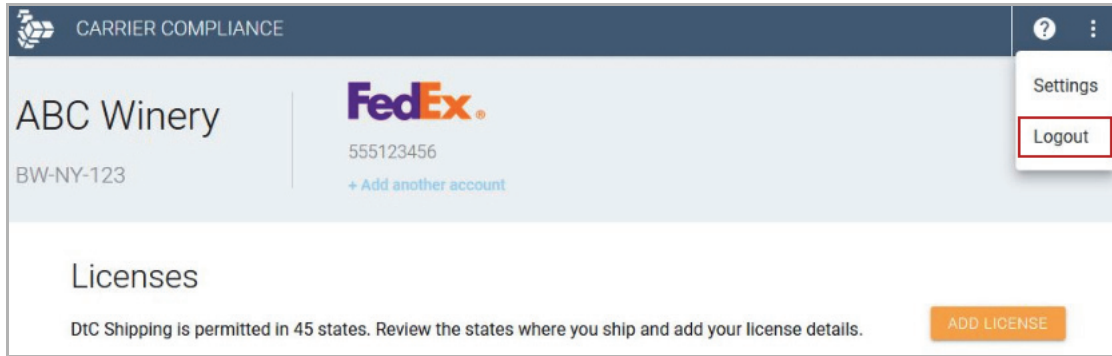
2. Once the account has been created, a prompt will appear for additional information to be provided; select **Producer** or **Retailer** and enter a FBPN or Retailer License into the appropriate field and click **Continue**.



The screenshot shows the 'Carrier Compliance account created!' screen. At the top is the heading 'Carrier Compliance account created!'. Below it is the subheading 'Tell us a little more about yourself'. There are two radio buttons: 'I am a: ☐ Producer ☐ Retailer'. Below the radio buttons is an input field labeled 'FBPN or Retailer License'. At the bottom right is an orange button labeled 'CONTINUE'.

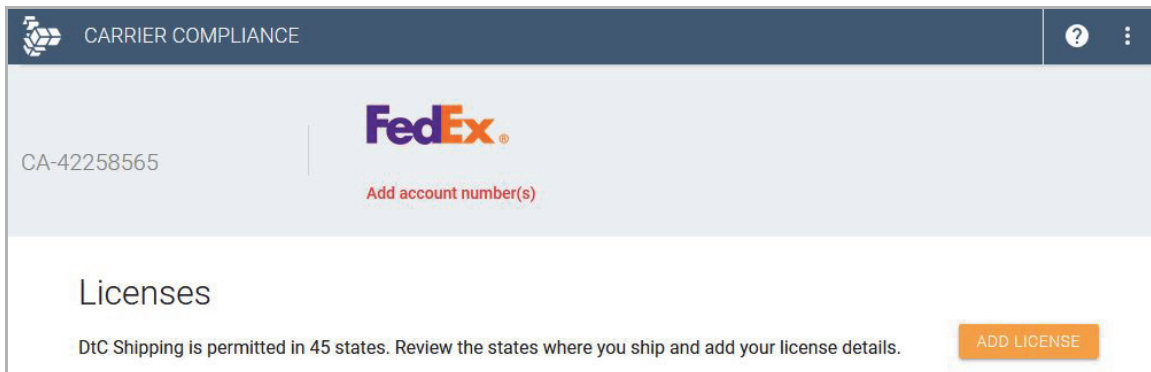
Logging Out

To log out of the ShipCompliant License Portal, click the  icon in the upper right-hand corner of the screen and click **Logout**.



Viewing Licenses

Upon logging in, the **License** screen will be displayed. If state licenses have not been added to the account, the **Licenses** screen will appear empty.



If state licenses have been added to the account, these licenses will be listed on the **Licenses** screen upon logging in.

CARRIER COMPLIANCE

ABC Winery
BW-NY-123

FedEx
Add account number(s)

Licenses

DtC shipping is permitted in 45 states. Review the states where you ship and add your license details. [ADD LICENSE](#)

Ship-To State ▼	License Type	License Number	Effective	Expires
Alaska	No license required	n/a	n/a	n/a
Colorado	Winery direct shipper permit	047-58276	1/1/2013	Does not expire
Florida	No license required	n/a	n/a	n/a
Hawaii	Direct shipper license - Hawaii	9218341209380	6/13/2015	Does not expire
Hawaii	Direct shipper license - Honolulu	9898-WIL-299	7/1/2017	12/31/2025
Nebraska	S1-Direct shipper license	0000129812	5/24/2015	Does not expire
New York	Direct wine shipment license serial number	90-OPA103948	4/30/2014	Does not expire

Adding FedEx Accounts

FedEx accounts can be added to the Licence Portal from the **Licenses** screen or from the **My Account** screen. To add an additional account from the **Licenses** screen:

1. Click **Add account number(s)**; the account number field will be displayed.

CARRIER COMPLIANCE

ABC Winery
BW-NY-123

FedEx
Add account number(s)

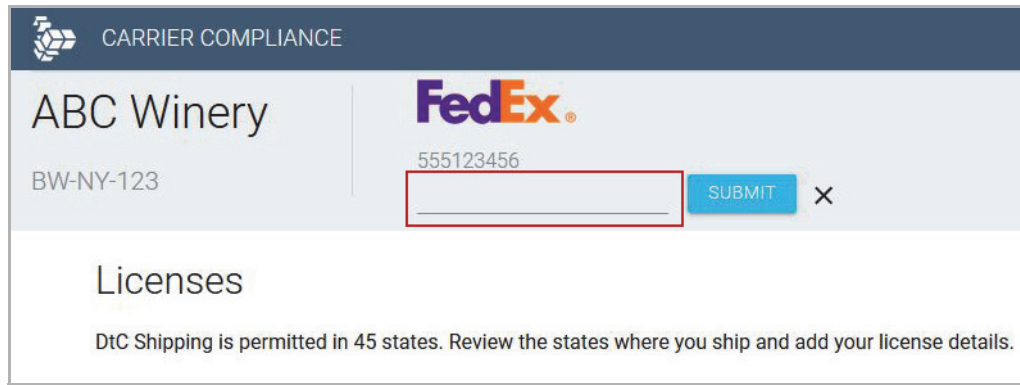
Licenses

DtC shipping is permitted in 45 states. Review the states where you ship and add your license details. [ADD LICENSE](#)

Ship-To State ▼	License Type	License Number	Effective	Expires
Alaska	No license required	n/a	n/a	n/a
Colorado	Winery direct shipper permit	047-58276	1/1/2013	Does not expire

Note: If a FedEx account number already exists in the account, this field will read **Add another account**.

2. Enter the account number into the field and click **Submit**. To cancel, click **X**.



CARRIER COMPLIANCE

ABC Winery

BW-NY-123

555123456

SUBMIT X

Licenses

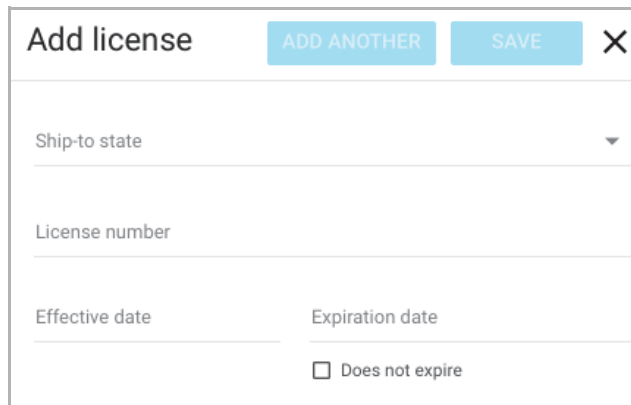
DtC Shipping is permitted in 45 states. Review the states where you ship and add your license details.

Note: To add an account from the **My Account** screen, see [Adding FedEx Accounts](#).

Adding Licenses

To add a license:

1. From the **License** screen, click **Add License**; the **Add license** sliding panel will be displayed.



Add license

ADD ANOTHER SAVE X

Ship-to state

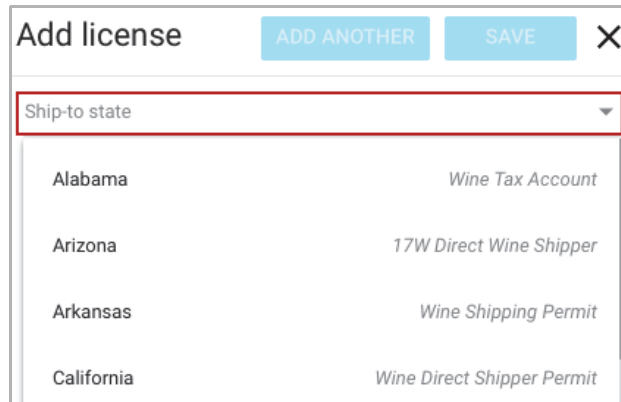
License number

Effective date

Expiration date

☐ Does not expire

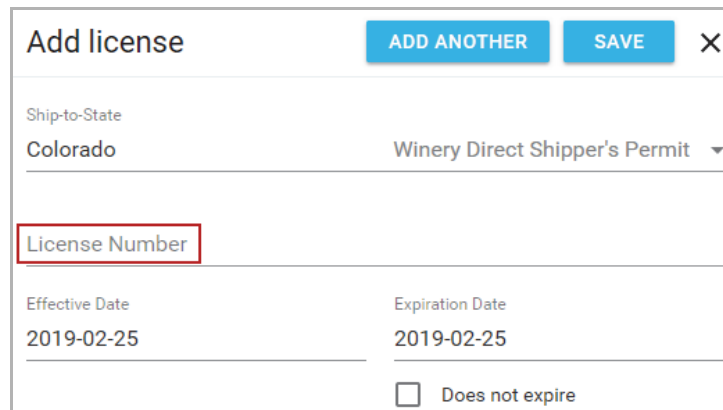
- Click into the **Ship-to state** field and select the desired state from the drop-down list.



The screenshot shows the 'Add license' form with the 'Ship-to state' dropdown menu open. The dropdown list includes the following states and permit types:

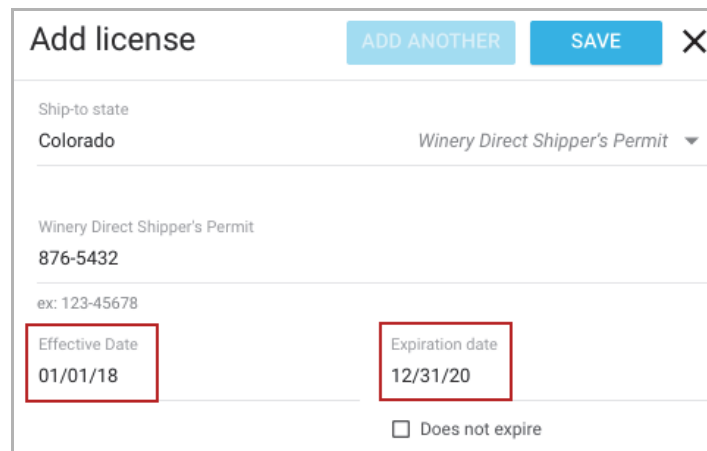
State	Permit Type
Alabama	Wine Tax Account
Arizona	17W Direct Wine Shipper
Arkansas	Wine Shipping Permit
California	Wine Direct Shipper Permit

- Enter the Direct Shipper's Permit number into the **License Number** field.



The screenshot shows the 'Add license' form with the 'License Number' field highlighted. The form also displays the 'Ship-to-State' as Colorado and the 'Winery Direct Shipper's Permit' type. Below the license number field, there are fields for 'Effective Date' (2019-02-25) and 'Expiration Date' (2019-02-25), and a checkbox for 'Does not expire'.

- If the license has an expiration date, click into the **Effective Date** and **Expiration Date** fields to select dates from the date picker window. If the license does not expire, check the **Does not expire** box. Alternatively, to close the **Add license** sliding panel and discard any changes, click the **X** icon in the upper right-hand corner of the screen.



The screenshot shows the 'Add license' form with the 'Effective Date' and 'Expiration Date' fields highlighted. The form also displays the 'Ship-to state' as Colorado and the 'Winery Direct Shipper's Permit' type. Below the license number field, there are fields for 'Effective Date' (01/01/18) and 'Expiration date' (12/31/20), and a checkbox for 'Does not expire'.

5. If there are no more licenses to be added, click **Save**; to save the current license and add another, click **Add Another**.

Deleting Licenses

To delete a license:

1. From the **Licenses** screen, hover over the license to be deleted; the  icon will appear.

Licenses

DtC shipping is permitted in 45 states. Review the states where you ship and add your license details. ADD LICENSE

Ship-To State ▼	License Type	License Number	Effective	Expires
Alaska	No license required	n/a	n/a	n/a
Colorado	Winery direct shipper permit	047-58276	01/01/13	Does not expire 
Florida	No license required	n/a	n/a	n/a
Hawaii - Hawaii	Direct shipper license	9218341209380	06/13/15	Does not expire
Hawaii - Honolulu	Direct shipper license	9898-WIL-299	07/01/17	12/31/25
Nebraska	S1-Direct shipper license	0000129812	05/24/15	Does not expire
New York	Direct wine shipment license serial number	90-OPA103948	04/30/14	Does not expire

2. Click ; the **Delete License?** window will appear.

Delete License? ✕

Colorado 047-8527
Winery direct shipper permit
01/01/13 - Does not expire

DELETE LICENSE

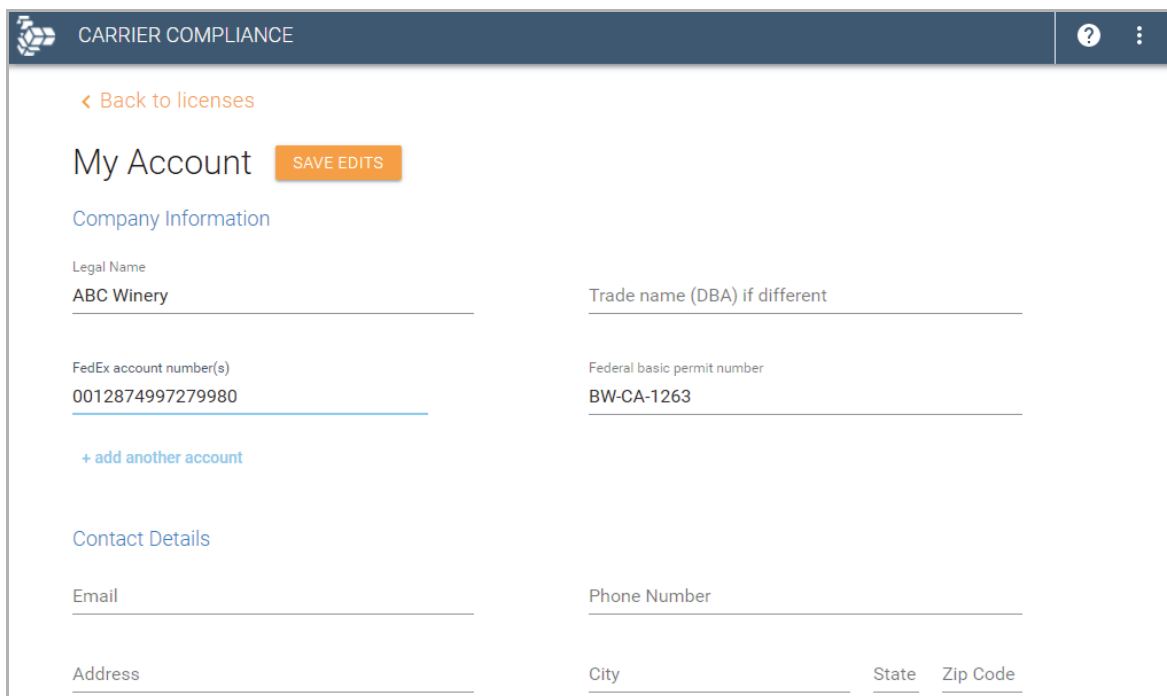
3. Click **Delete License** to delete the license, or click **X** to cancel and exit the **Delete License?** window.

Account Settings

Users can manage company information and contact details, as well as add additional FedEx accounts in the **My Account** screen.

My Account

To access the **My Account** screen, click ; the **My Account** screen will be displayed.



The screenshot displays the 'My Account' screen within the 'CARRIER COMPLIANCE' portal. The header includes a logo, the text 'CARRIER COMPLIANCE', and a help icon. Below the header, there is a link to '< Back to licenses' and a 'My Account' title with a 'SAVE EDITS' button. The 'Company Information' section contains fields for 'Legal Name' (ABC Winery), 'Trade name (DBA) if different', 'FedEx account number(s)' (0012874997279980), and 'Federal basic permit number' (BW-CA-1263). There is also a '+ add another account' link. The 'Contact Details' section includes fields for 'Email', 'Phone Number', 'Address', 'City', 'State', and 'Zip Code'.

Company Information	
Legal Name ABC Winery	Trade name (DBA) if different
FedEx account number(s) 0012874997279980	Federal basic permit number BW-CA-1263
+ add another account	

Contact Details	
Email	Phone Number
Address	City State Zip Code

Editing Account Information

To edit company information or contact details:

1. Click into the field(s) to be edited and make any necessary changes.

My Account [SAVE EDITS](#)

[Company Information](#)

Legal name
ABC Winery

Trade name (DBA) if different

FedEx account number(s)
0012874997279980

Federal basic permit number(s)
BW-CA-1263

FedEx account number

[Contact details](#)

Email

Phone Number

Mailing address

City State Zipcode

2. Ensure all the information is correct and click **Save Edits**.

My Account [SAVE EDITS](#)

[Company Information](#)

Legal name
ABC Winery

Trade name (DBA) if different

FedEx account number(s)
0012874997279980

Federal basic permit number(s)
BW-CA-1263

FedEx account number

[Contact details](#)

sample@email.com

Phone Number

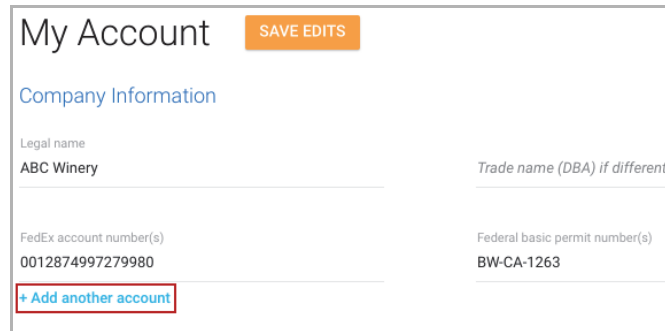
Mailing address

City State Zipcode

Adding FedEx Accounts

To add an additional account in the **My Account** screen:

1. From the **My Account** screen, click **+ Add another account**.



My Account **SAVE EDITS**

Company Information

Legal name
ABC Winery

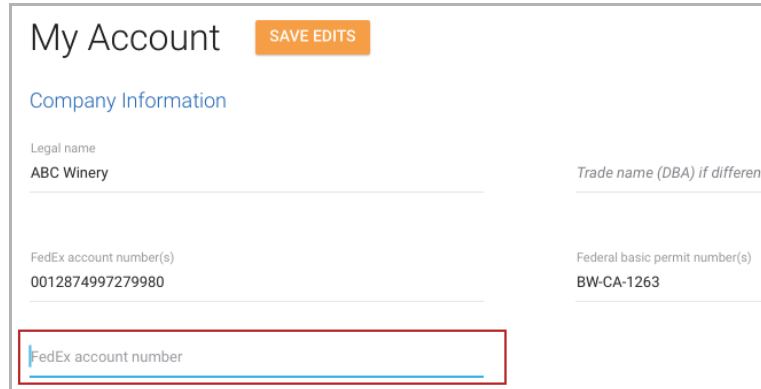
Trade name (DBA) if different

FedEx account number(s)
0012874997279980

Federal basic permit number(s)
BW-CA-1263

+ Add another account

2. Enter the new account number into the field indicated below.



My Account **SAVE EDITS**

Company Information

Legal name
ABC Winery

Trade name (DBA) if different

FedEx account number(s)
0012874997279980

Federal basic permit number(s)
BW-CA-1263

FedEx account number

3. Ensure the account number is accurate and click **Save Edits**.

Note: Additional accounts can also be added from the **Licenses** screen; to add accounts from the **Licenses** screen, see [Account Settings](#).
