



Your 1-hour Shippo setup guide

Get ready to spruce up your shipping— *in less than an hour.*

Spring is the perfect moment to freshen up your business and make shipping easier on yourself. In less than an hour, you can set up a handful of Shippo features that quietly save time, prevent mistakes, and help your business run more smoothly all year long. Think of it as spring cleaning for your shipping setup, without the overwhelm. Here's what you'll accomplish:

Save time with automated workflows and more

- Connect all your stores so orders flow into Shippo automatically
- Fulfill orders quickly with automations, defaults, and package templates
- Streamline shipping with your whole team

Maximize your profits

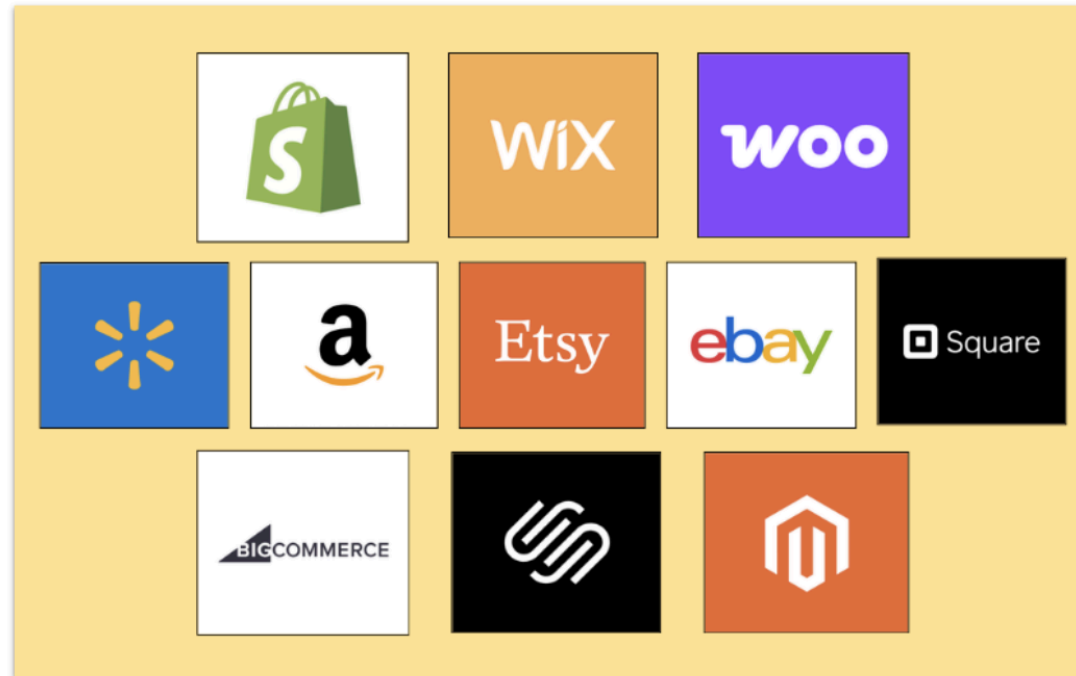
- Get clear, estimated delivery dates to balance cost and speed for every order
- Insure your orders to protect your bottom line

Elevate your customer experience to drive repeat sales

- Build customer trust with branded tracking and easy returns

Save time with automated workflows and more

Connect all your
stores to Shippo





💡 Why it matters

To keep customers happy and grow your business, you need to fulfill orders efficiently and accurately. Connecting your stores to Shippo means orders are imported into Shippo automatically and tracking updates sync back to your store platform without extra effort. No more juggling tools or making any copy/paste errors, especially when things get busy.

How to connect your stores

1. Go to Settings → [Stores](#).
2. Click on your e-commerce store.
3. On the *Connect store* modal, enter your store credentials.
4. Click the Continue button.
5. Follow the authentication prompt (typically just logging into your store platform and authorizing Shippo).

 **Want a quick demo?** Check out our [video](#).

 **Questions?** Check out our [Help Center article](#).

Set defaults

Default service level

1. Select a carrier
UPS - (US) ▼

2. Select a service level
UPS Ground ▼

Default return label service level

1. Select a carrier
UPS - (US) ▼

2. Select a service level for returns
UPS Saver® ▼

Auto-create return labels for outbound shipments

Why it matters


Setting up your defaults now means fewer clicks and fewer mistakes when things get hectic. By saving your most-used settings—like carrier, label format, packing slip format, and international shipment details—there’s no need to re-enter these details for every order. You’ll speed through label creation and ensure every shipment is accurate.

Common defaults that take seconds to set up

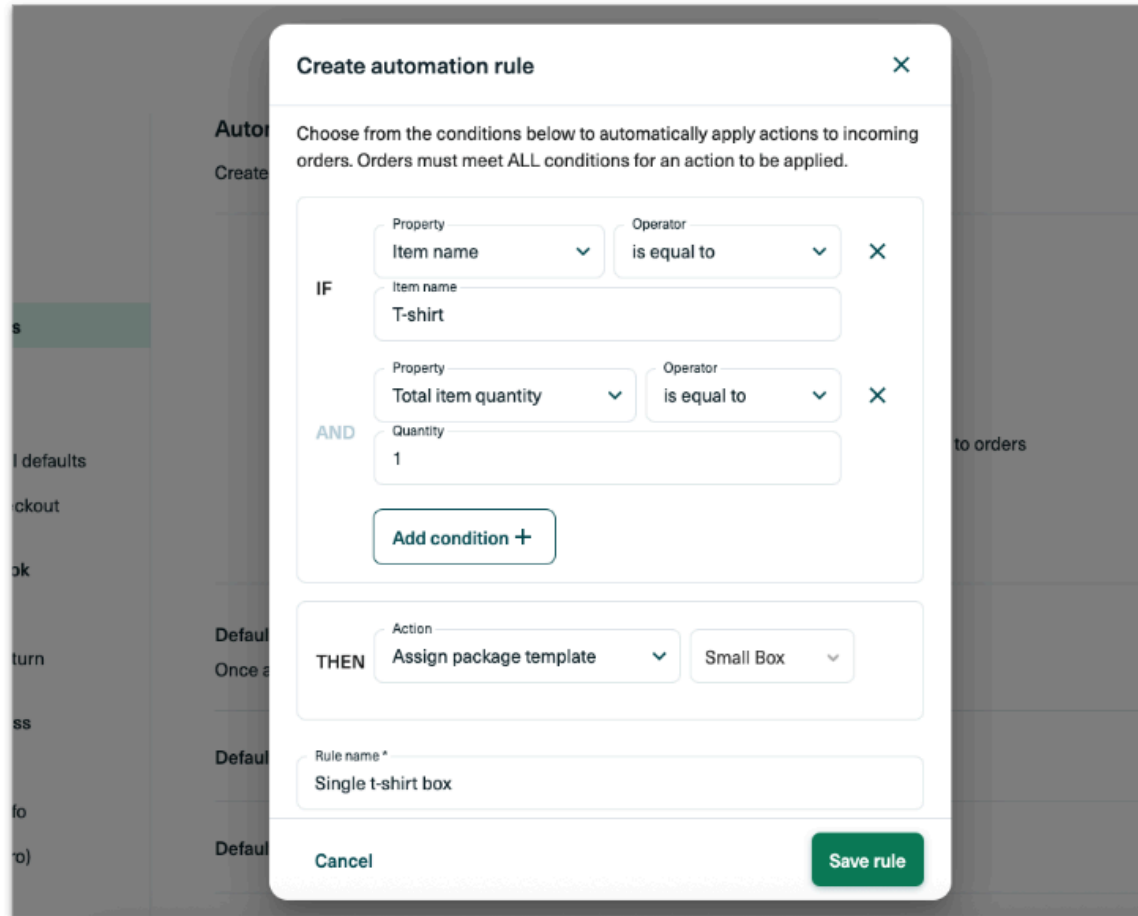
- If you only ship using a specific carrier/service level, set your *Default service level* to the carrier/service level of your choice
 - If you only use UPS for all shipments, set your *Default service level* to UPS
 - If you only use UPS Ground for outbound shipments, set your *Default service level* to UPS Ground
 - If you only use UPS Saver for return labels, set your *Default return label service level* to UPS Saver
- If you ship internationally, you can set defaults for certain international fields
 - If you always choose “DDU” as your *Incoterm*, set your *Incoterm Default* to “DDU (customs billed to recipient)”
 - If you always choose “Merchandise” as your *Purpose of shipment*, set your *Purpose of shipment default* to “Merchandise”

How to set defaults

1. To set your default carrier, label format, or packing slip format, go to Settings → [Labels & packing slips](#).
 - a. Under “Default service level,” choose your preferred carrier (if you have one). This ensures your labels automatically default to that carrier during label creation.
2. To set your international defaults, go to [International defaults](#).
 - a. Set your defaults for incoterm, purpose of shipment, tax ID, and AES ITN if applicable, then click “Save.”
3. These settings will automatically apply to every new label.

 **Want a quick demo?** Check out our [video](#).

Create shipping automations



Create automation rule ✕

Choose from the conditions below to automatically apply actions to incoming orders. Orders must meet ALL conditions for an action to be applied.

IF

Property: Item name ▼ Operator: is equal to ▼ ✕
 Item name: T-shirt

AND

Property: Total item quantity ▼ Operator: is equal to ▼ ✕
 Quantity: 1

Add condition +

THEN

Action: Assign package template ▼ Small Box ▼

Rule name *
 Single t-shirt box

Cancel **Save rule**

💡 Why it matters


When things get busy, don't waste time manually selecting carriers, services, and package templates for every order. Automations lets you set shipping rules once—like “if the order contains 1 t-shirt, use the 5x5x5 package template”—and applies these rules automatically to all your orders. Save hours and reduce errors when speed matters most.


Common automations that take seconds to set up

- Automatically assign a package template based on what's in the order
 - If item name contains “poster” → use “Tube Mailer”
 - If item SKU is “D12345” and contains 1 item quantity → use “5x5x5 Box”
- Automatically choose service levels based on weight
 - If weight < 1 lb → Assign the cheapest rate
 - If weight > 2 lbs → Assign USPS Priority
- Automatically choose the right sender address based on where the order is going
 - If the destination is CA, OR, or WA → Ship from your California warehouse
 - If it's headed to NY, NJ, or MA → Ship from your East Coast center

How to create automations

1. Go to Settings → [Automations](#).
2. Click “Create new rule” and start with your most common scenarios.
3. In the “If” section, choose the order property (e.g., weight, item name, destination) that determines when your rule applies.
4. In the “Then” section, select the action Shippo should take on those orders (for example, apply a specific package template).
5. Give your Automation Rule a name and description, and click “Save rule.”
6. Set rule priority if you have multiple rules (simply drag to reorder). Rules will run in sequence from top to bottom in the order you specify.

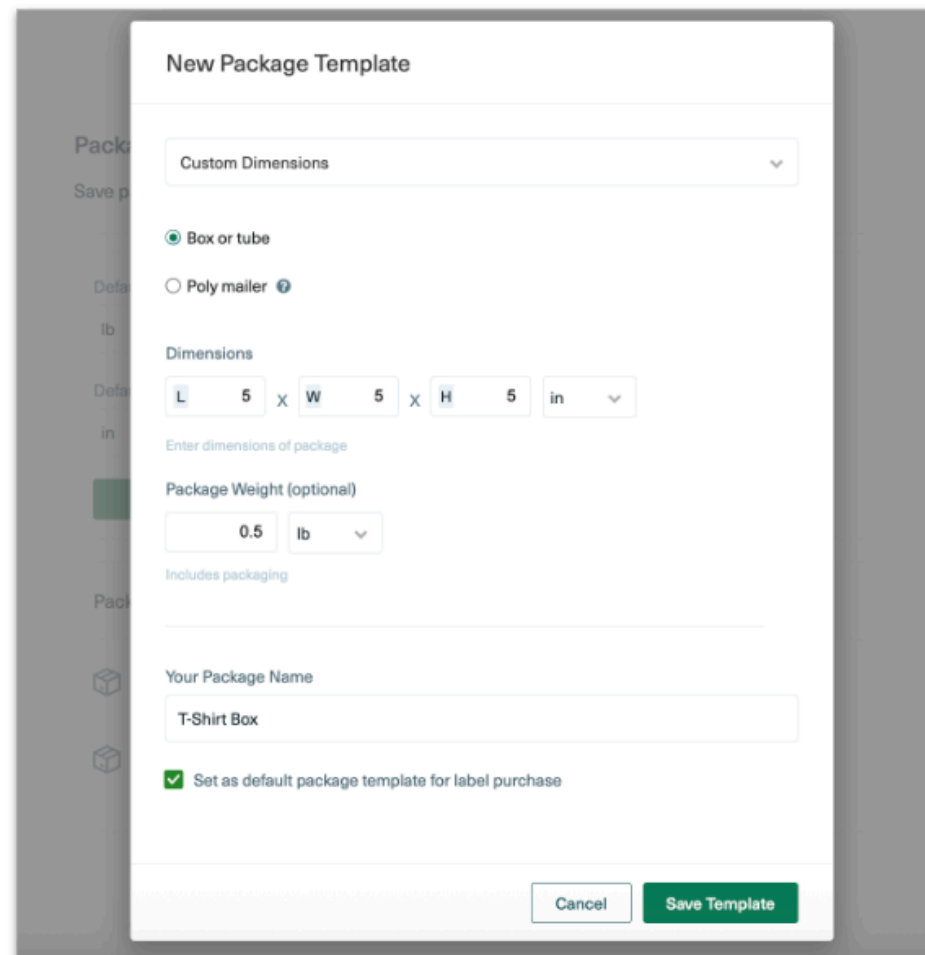
 **Want a quick demo?** Check out our [video](#).

 **Questions?** Check out our [Help Center article](#).

Set up package templates

💡 Why it matters

Stop entering the same package dimensions over and over. Create package templates for items you ship regularly—like a 5x5x5 box for t-shirts. Then during label creation, just select "5x5x5 Box" instead of typing dimensions and weight manually, saving time and preventing costly shipping errors.



New Package Template

Custom Dimensions

Box or tube

Poly mailer

Dimensions

L 5 x W 5 x H 5 in

Enter dimensions of package

Package Weight (optional)

0.5 lb

Includes packaging

Your Package Name

T-Shirt Box

Set as default package template for label purchase

Cancel Save Template


How to set up package templates


1. Go to Settings → [Packages](#).
2. Click “+ New template” and enter in your package template’s dimensions, weight (optional), and name.
3. If you’d like this to be your default package template for new labels, check “Set as default package template for label purchase” and click “Save.”
4. Your saved package templates will appear as options whenever you create labels.

Want to save extra time?

Create an automation rule that automatically assigns a package template based on what’s in the order. For instance:

- If item SKU is “D12345” and contains 1 item quantity → use “5x5x5 Box”
- If item name contains “poster” → use “Tube Mailer”

 **Want a quick demo?** Check out our [video](#).

 **Questions?** Check out our [Help Center article](#).

Add users to your account

Why it matters

Fulfilling orders solo can be time-consuming. Add teammates, temps, or family with individual logins (up to 300 logins on Pro Plan). Individual accounts let you track who created which label which is critical when investigating specific orders in case things go wrong.

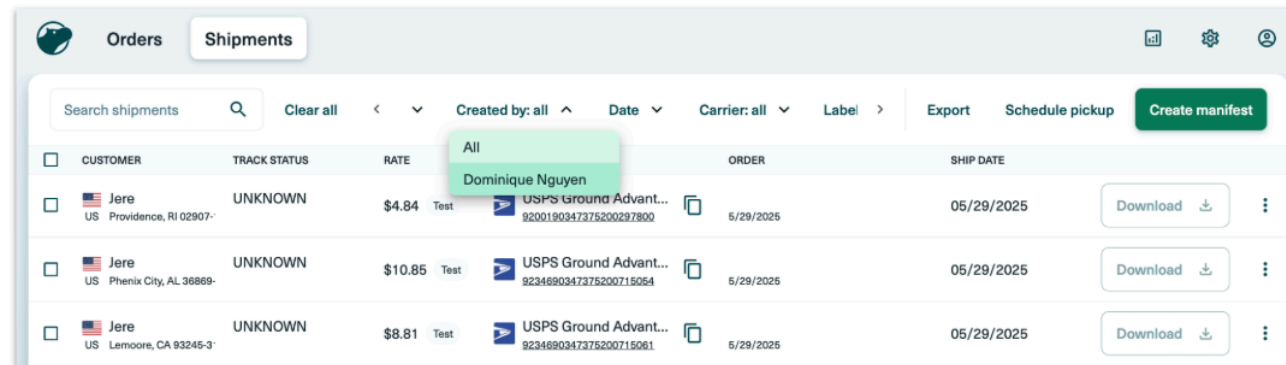
How to add users to your account

1. Go to Settings → [Users](#).
2. Click “+ Add New User” toward the top right of the user management pane and enter their email address.
3. Click “Send Invite.” The user will receive an email invitation to create their password to access their account.

How to track who created a specific label

1. Go to the [Shipments](#) page.

2. Click "Created By" in the filter bar.
3. Select a user to see all labels they created.



🗨️ **Questions?** Check out our [Help Center article](#).

Add tags to your orders






💡 Why it matters

To keep your business running smoothly, organization is everything. Tags give you an easy, flexible way to label orders—like “High Priority,” “VIP,” or “Restock”—so you can manage and sort them however makes the most sense for your workflow. For example, if orders being shipped to West Coast states like California, Oregon, and Washington are high priority for your business, you can create a “high priority” tag and assign this tag to your orders—making it easy to identify and manage these high priority orders.


📌 Common tags that can be set up


Note: Tags are completely customizable based on your needs. The examples below are just to provide you with inspiration. Feel free to create tags that work best for your workflow.

- "Priority" for expedited orders
- "VIP Customer" for your best customers
- "Gift Order" for orders that require gift wrapping

ORDER	TAGS	CUSTOMER	ITEMS
 10/22/2025		 Jere US Macon, GA 31217-4374	1x T-shirt 1 lb \$20.00
 10/22/2025		31217-4374	1x T-shirt 1 lb \$20.00
 10/22/2025		35711-2065	1x T-shirt 1 lb \$20.00

+ New tag...

 International

 VIP Customer ×

How to create tags

1. Go to Settings → [Tags](#).
2. Click “Create Tag +.”
3. Select the icon you would like to use to tag orders and enter a tag name.
4. Click the “Save” button.

How to add tags to one order at a time

1. Go to the [Orders](#) page.
2. Click the + icon found in the Tags column.
3. Select the tag you would like to apply to the order.

How to add tags to multiple orders at a time

1. Go to the [Orders](#) page.
2. Select your orders by checking the box on the left side of each order.
3. Click Tag found in the top navigation bar.
4. Select the tag you would like to apply to the selected orders.

Want to automatically assign tags to orders?

You can automatically tag orders to batch, filter, and prioritize with ease. For instance, you can create automation rules like:

- If shipping country \neq US \rightarrow Assign “International” tag to order
- If item name contains “Holiday” \rightarrow Assign “Holiday 2024” tag to order

Want a quick demo? Check out our [video](#).

Questions? Check out our [Help Center article](#).

Set up filter views for your orders

ORDER	TAGS	CUSTOMER	ITEMS	PACKAGE	RATES	
<input type="checkbox"/> 11/5/2025	+	Jere CA Victoria, BC V8V 4G1		Custom dimensions 1.00 lb 5 x 5 x 5 in	The customs item informatio...	View order
<input type="checkbox"/> 11/5/2025	+	Jere CA Victoria, BC V8V 4G1		Custom dimensions 1.00 lb 6 x 5 x 5 in	The customs item informatio...	View order
<input type="checkbox"/> 5/27/2025	+	Jere CA Victoria, BC V8V 4G1		Custom dimensions 2.00 lb 8 x 5 x 4 in	The customs item informatio...	View order

Why it matters

Filter views help you see orders from specific stores, domestic vs. international orders, and more. Instead of setting up these order filters every time, save your filters once and access them with a single click. For instance, if you have two Shopify stores, create a filter for each so you can easily toggle between them. Pre-saved filters let you jump straight to what matters most.

How to set up filter views





1. Go to the [Orders](#) page.
2. Select your filters as you normally do.

3. Once your filter criteria are set, click “Save search” under the “Create label” button.
4. Name your filter something descriptive like "Rod's Rocks Shopify Store.”
5. Repeat for other common filter views you need.
6. Your saved filters now appear above your orders.

🗨️ **Questions?** Check out our [Help Center article](#).

Maximize your profits

Enable Shippo Estimate

Without Shippo Estimate	With Shippo Estimate
<p>BEST</p> <p> USPS Priority Mail \$12.81 3 days</p>	<p>BEST</p> <p> USPS Priority Mail \$12.81 📅 Mon, Nov 10</p>
<p>CHEAPEST</p> <p> USPS Ground Advantage \$8.59 5 days</p>	<p>CHEAPEST</p> <p> USPS Ground Advantage \$8.59 📅 Wed, Nov 12</p>

💡 **Why it matters**


Shippo Estimate uses AI to show estimated delivery dates before you purchase a label, helping you balance speed

and cost for every order. No more overspending on expedited services or worrying about late deliveries—choose the right service level with confidence. Plus, when customers ask "Where's my order?," you can give them accurate delivery expectations to keep customers happy.

How to enable Shippo Estimate (if you're not on Pro Plan)

1. Go to Settings → [Plan](#).
2. Click "Upgrade Plan" and upgrade to Pro Plan.
3. Shippo Estimate's estimated delivery dates will automatically appear in your rate shopping experience.

If you're on our Pro Plan, no action is required. Shippo Estimate will automatically appear in your rate shopping experience.

 **Questions?** Check out our [Help Center article](#).

Set up automatic insurance

Why it matters

Affordable insurance (as low as 1.25% of order value—just pennies for a \$10 package) protects your revenue and reputation when packages are lost, damaged, or stolen.

- **Only insure orders over a certain value?** → Set automatic insurance for orders over a specified value.
- **Insure everything?** → Set automatic insurance for all orders.
- **Don't use insurance yet?** → You should. Get reimbursed for your package's total order value, shipping label, return shipping (for damaged packages), and re-shipping. File claims through an easy online portal and get reimbursed in less than 3 days. Insurance is 20% cheaper and claims are 20 days faster compared to carrier insurance.

How to set up automatic insurance

1. Go to Settings → [Insurance](#).
2. Select whether you'd like to automatically add insurance to all your packages or those over a specified value.

3. If you're insuring all packages over a specified value, select a currency and enter a value that determines whether or not insurance will be added.
4. Choose your option and click "Save."

Insurance Save

Automatic package protection

Automatically add insurance to all my packages

Automatically add insurance to all my packages with a value above


Currency: USD

Do not automatically add protection. I prefer to add manually

By adding protection, you agree to the [terms, conditions and exclusions](#). Protection sold by Cover Genius and powered by XCover.

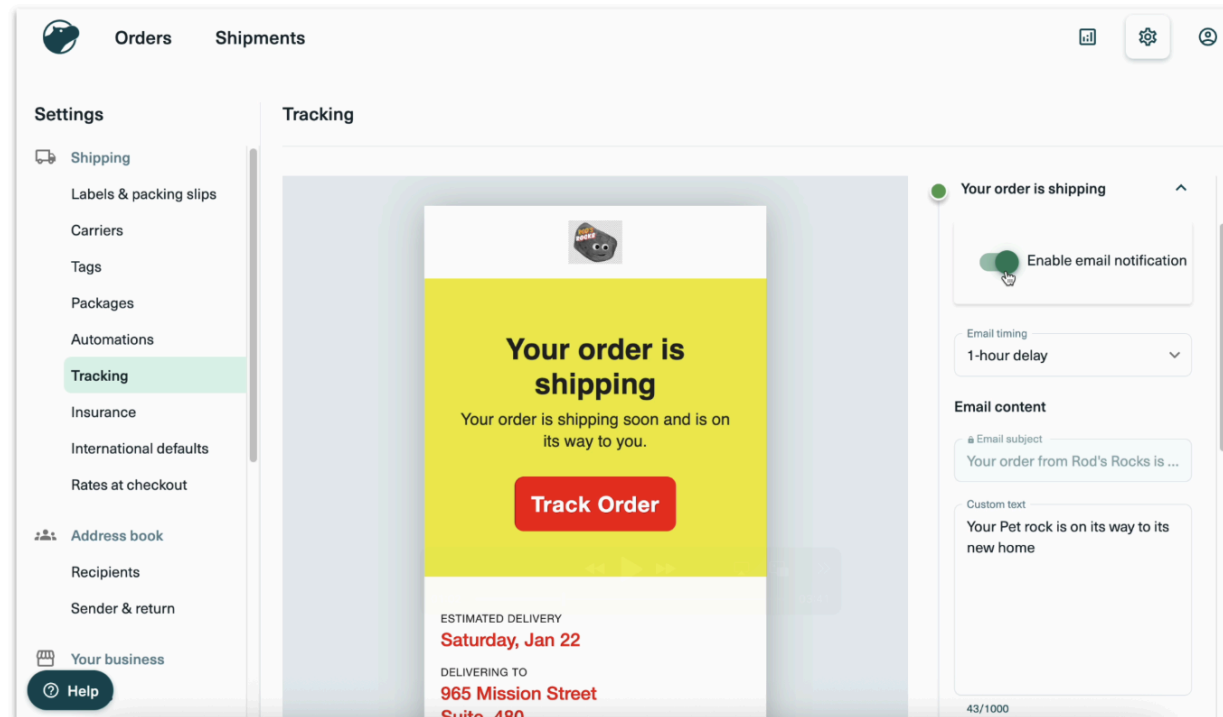
Shippo Total Protection

- 20% cheaper and 20 days faster claims compared to carrier insurance
- Coverage for lost, stolen, or damaged shipments
- Reshipping and return reimbursement
- Instant payouts for approved claims

 **Questions?** Check out our [Help Center article](#).

Elevate your customer experience to drive repeat sales

Set up
automated,
branded
tracking
notifications



💡 Why it matters

Turn shipping updates into sales opportunities. Branded tracking pages let you add your logo, colors, and product recommendations—transforming "Where's my order?" into trust and repeat purchases. Automated notifications also keep customers informed without lifting a finger, reducing support tickets when you're busiest.


⚙️ How to set up automated tracking notifications


1. Go to Settings → [Tracking](#).

2. On the right-hand side under “Email notifications,” toggle on automated tracking notifications for “Your order is shipping” emails and adjust the email timing to whatever you prefer.
3. Under “Email notifications,” toggle on automated tracking notifications for your “Your order has arrived” emails. After, click “Save.”

How to set up branded tracking notifications

1. Go to Settings → [Branding](#).
2. Upload your logo and brand colors, then click “Save”.
3. Go to Settings → [Tracking](#).
4. Within the “Emails” section, add product recommendations or promotional content to your tracking page.
5. Within the “Tracking Page” section, add product recommendations or promotional content to your tracking page.

 **Want a quick demo?** Check out our [video](#).

 **Questions?** Check out our [Help Center article](#).

Set up automatic return labels

Default return label service level

1. Select a carrier
USPS

2. Select a service level for returns
USPS Ground Advantage


Auto-create return labels for outbound shipments


Why it matters

Pre-configured return labels turn returns into a seamless experience. Set Shippo to automatically generate a return label for every outbound shipment, print it, and include it in the package. Customers can return items without contacting you—saving you time and email back-and-forth while preserving customer trust. The best part? You only get charged if the return label is actually used.

How to set up automatic return labels

1. Go to Settings → [Labels & packing slips](#).
2. If you want to create all return labels using a specific carrier/service level, set your *Default return label service level* accordingly.
3. Check “Auto-create return labels for outbound shipments” and click “Save.”
4. When you generate outbound labels for domestic shipments, return labels will be automatically generated.
5. Include the return label in your outbound package.

 **Want a quick demo?** Check out our [video](#).

 **Questions?** Check out our [Help Center article](#).

Even more spring shipping strategies

Looking for more ways to save even more time and money while elevating your customer experience?

- Edit and print up to 100 orders at once → [Learn more](#)
- Drop off dozens of packages in seconds with manifests → [Learn more](#)
- See 8 ways to lower your shipping costs → [Learn more](#)

Questions? Reach out to our [support team](#).