

BigCommerce Shadow-Pilot Setup Guide

This guide explains the managed setup path available after a BigCommerce shadow-pilot application is accepted and readiness is verified; it is not a self-service marketplace install. An approved pilot defines a representative sample, uses only agreed connections, reviews recommendations beside real operations for up to 30 days, and ends with a documented go-live, revise, or no-go decision.

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BEST FOR: BigCommerce owners, operators, and implementation leads

WEB GUIDE: <https://shipsafeoffers.com/guides/bigcommerce-shadow-pilot-setup>

Current availability

The public first step is the BigCommerce pilot waitlist. Margin Safe Discounts is not presented here as a public, self-service BigCommerce Marketplace install. Connection instructions are provided only after acceptance, readiness verification, scope, data handling, permissions, and support ownership are agreed.

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Begin with current availability

Begin by joining the BigCommerce pilot waitlist. If the application is accepted and readiness is verified, the team defines a selected sample, confirms how information will be exchanged, reviews the requested connections, and agrees on the evidence needed for a decision.

An accepted pilot runs beside the merchant's current operation for up to 30 days. It evaluates selected carts and records recommendations without changing the shopper experience. Any live use requires a separate merchant approval and a verified scope.

No public form should receive secrets

Do not submit passwords, API keys, carrier credentials, customer labels, negotiated rates, or sensitive catalog exports through the pilot-fit form, contact form, or ordinary email. Ship Safe Offers provides the approved secure intake or connection method after scope is agreed.

Prepare the smallest useful sample

A useful pilot does not need the whole catalog. Start with a representative group that covers the operating decisions the merchant actually wants to test.

Pilot inputs to prepare before the kickoff	
Input	What to prepare
Selected products	A small set of important, high-variance, or operationally difficult products and variants.
Representative carts	Examples that include nearby and distant destinations, single- and multi-line orders, and parcel, LTL, palletized, or mixed scenarios where relevant.
Ship-from context	The approved origin or origins and the operating rule used to choose among them.
Product economics	The positive product-cost fields and the merchant-selected contribution-margin boundary used for the pilot.
Shipping attributes	The dimensions, weights, handling requirements, and known service constraints available for the selected sample.
Packout evidence	Reviewed examples of how the products actually leave the floor, including available final measurements or photos.
Available actuals	Recent shipment outcomes, invoices, or variance examples that can support a useful comparison, if the merchant is authorized to share them securely.

Missing data can still teach us something

The pilot can identify which selected items are not yet ready and why. Missing information should narrow the decision, not be converted into a zero or an unlabelled guess.

Step 1: Define the pilot scope

1 Name the operating question

Decide whether the pilot is testing catalog readiness, parcel-versus-LTL decisions, all-in offer headroom, packout variance, final-bill variance, or a defined combination.

2 Choose the sample

List the products, carts, destinations, shipment modes, and available actuals included in the review.

3 Write the exclusions

Call out checkout paths, promotions, carriers, categories, destinations, or data that are not part of the pilot.

4 Assign owners

Identify the merchant owner for catalog data, warehouse review, margin rules, technical connection, and final approval.

5 Set the review date

Choose when the team will compare evidence and decide to approve, revise, extend within the agreed limit, or stop.

Start with the invite-only pilot waitlist before sharing a private sample:

- JOIN PILOT WAITLIST

<https://shipsafeoffers.com/shadow-pilot#fit-check>

- See what the pilot includes

<https://shipsafeoffers.com/shadow-pilot#pilot-includes>

Step 2: Approve the BigCommerce connection

If the pilot is accepted and readiness is verified, Ship Safe Offers provides the tenant-specific connection path and the exact permissions requested. A merchant owner or authorized administrator should review those permissions before approving the connection.

1 Use an authorized account

The person approving access must have the right to connect the store and should follow the merchant's own change-control process.

1 Review the requested scope

Confirm that the requested BigCommerce permissions match the written pilot scope. Ask before approving anything that is unclear.

1 Keep credentials private

Never email a store password, API key, carrier credential, or access token. Use only the connection method supplied for the approved pilot.

1 Record the change

Keep the connection date, approver, scope, and support owner with the pilot record.

Stop if the request does not match the plan

Do not approve a permission or connection because it appears in a setup screen. Compare it with the written scope and ask help@shipsafeoffers.com to explain the need.

Step 3: Connect only the approved shipping inputs

Current carrier or rate information may be included when it is necessary for the agreed pilot. The connection method, fields, and provider responsibilities depend on the merchant's systems and the approved scope.

1 Confirm each ship-from origin

Document the physical origin used by the selected orders and how the operation chooses among multiple locations.

2 List the shipment modes

Identify parcel, LTL, palletized, mixed, custom, or merchant-approved rate sources included in the sample.

3 Confirm service requirements

Record known residential, liftgate, appointment, handling, delivery-area, or other requirements that materially affect the selected scenarios.

4 Use the secure connection path

Provide credentials or private rate information only through the approved server-side method, never through the public site or a shared document.

5 Document fallback behavior

Agree on what the pilot should record when a required source is unavailable. The protected recommendation should be withheld rather than guessed.

Step 4: Review catalog and packout readiness

Review the selected products with both the catalog owner and the warehouse team. The catalog supplies the declared product information; the operation supplies the reality of how the item is protected, combined, boxed, palletized, measured, weighed, and handed off.

Readiness review for each selected product or variant	
Check	Ready when
Product cost	A known positive value is available from the approved merchant source.
Dimensions and weight	The selected shipping attributes are present and their source is understood.

Check	Ready when
Packout evidence	The warehouse has reviewed an example or approved operating pattern that reflects real practice.
Shipment requirements	Special handling, palletization, delivery service, and known accessorial exposure are identified where relevant.
Pilot eligibility	The product, origin, destination type, shipment mode, and checkout path are inside the written scope.

Do not force a fake box routine

The goal is not to make the floor obey an abstract carton plan. The goal is to start from reviewed real packouts and let the team correct what does not fit the operation.

Step 5: Approve the merchant rules

Before shadow decisions are reviewed, the merchant should document the business rules being tested. The selected contribution-margin floor is based on the listed inputs and is not a guarantee of profit or final carrier cost.

1 Protected margin floor

The contribution-margin boundary used to evaluate eligible recommendations for the selected sample.

1 Included costs

The product, payment, shipping, handling, reserve, or other approved inputs that belong in the pilot decision.

1 Reserve treatment

How uncertainty or expected variance will be represented during review.

1 Eligibility and exclusions

The exact products, paths, destinations, modes, and promotion interactions that may or may not receive a recommendation.

1 Presentation limits

The customer-facing form, minimum display rule, and offer limits to test if a later live scope is considered.

Use the public calculator only as an illustrative explanation of the margin boundary:

- Open the Maximum Safe Discount Calculator

<https://shipsafeoffers.com/tools/maximum-safe-discount-calculator>

Step 6: Run and review shadow mode

Run the selected sample beside the current operation for the agreed period, up to 30 days. The shopper experience remains unchanged while the team reviews recommendations, withheld decisions, packout evidence, and available final-bill comparisons.

1 Check decision coverage

Confirm how many selected scenarios had enough trusted information for review and which inputs blocked the rest.

2 Read the withhold reasons

Decide whether each no-offer result reflects a missing input, unavailable source, scope boundary, or genuinely limited headroom.

3 Compare representative actuals

Where evidence is available, compare the planned shipment with the final packout, service, invoice, and material variance.

4 Review merchant controls

Confirm that the selected floor, included costs, reserve treatment, and eligibility rules match the written plan.

5 Record disagreements

Preserve examples the warehouse, finance, or implementation team wants to challenge. A useful pilot makes disagreement visible.

Step 7: Make a documented activation decision

Shadow mode does not automatically become live. The merchant and Ship Safe Offers review the evidence and choose one of four outcomes: approve a narrow live scope, revise and re-test, continue only within the agreed pilot limit, or stop.

Pre-activation review gate	
Review	Evidence to confirm
Scope	The exact products, destinations, shipment modes, checkout paths, and promotion interactions allowed live.
Connections	The required store and rate sources are available and their fallback behavior has been observed.
Catalog and packout	The selected products have trusted inputs and warehouse-reviewed operating evidence.
Merchant controls	The approved floor, cost treatment, eligibility, offer limits, and named owners are documented.
Storefront QA	A controlled test covers eligible, excluded, changed-cart, changed-address, and unavailable-source cases for the approved paths.
Pause and support	The responsible people know the configured pause or stop path, escalation route, and rollback owner.

A farther address is not a predictable answer by itself

Changing a destination should trigger a fresh decision or a documented no-offer result. It does not always produce a smaller offer; rates, modes, service rules, and the rest of the cart can change the outcome.

Know how to pause, disconnect, delete, and get support

1 **Pause or narrow**

Use the configured pilot or live control where available, and contact the named support owner before widening the scope again.

1 **Disconnect**

Follow the tenant-specific connection instructions and the written pilot or order-form terms. Do not assume a marketplace uninstall flow applies.

1 **Request deletion**

Send a verified request under the Account and Data Deletion policy. The policy explains the 30-day handling target and legal-retention exceptions.

1 **Report an issue**

Preserve the store, time, affected path, and non-sensitive example identifier. Do not send credentials, private rates, or customer data through ordinary email.

1 **Get help**

Email help@shipsafeoffers.com. Ship Safe Offers aims to acknowledge new requests within one business day during the published support window.

Review the controlling trust and support documents:

- **Security and Trust Statement**

<https://shipsafeoffers.com/policies/security>

- **Data Processing Addendum**

<https://shipsafeoffers.com/policies/data-processing>

- **Account and Data Deletion**

<https://shipsafeoffers.com/policies/data-deletion>

- **Support Policy**

<https://shipsafeoffers.com/policies/support>

- **Terms of Service**

<https://shipsafeoffers.com/terms>

RELATED RESOURCES

Use the Margin Safe Discounts user guide

Understand eligibility, merchant controls, evidence review, and safe no-offer behavior.

<https://shipsafeoffers.com/guides/margin-safe-discounts-user-guide>

See the shadow-pilot method

Read what observation mode measures before a merchant considers a live change.

<https://shipsafeoffers.com/blog/what-a-30-day-shadow-pilot-actually-does>

See the BigCommerce parcel and LTL guide

Review the commerce-platform and shipping-mode handoffs behind the pilot.

<https://shipsafeoffers.com/blog/bigcommerce-parcel-ltl-checkout>

SUPPORT: help@shipsafeoffers.com

Do not send passwords, API keys, carrier credentials, negotiated rates, customer labels, or sensitive exports through ordinary email.