

Margin Safe Discounts User Guide

Margin Safe Discounts turns approved cart, shipment, and product-economics inputs into an eligible customer-offer recommendation above a merchant-set margin floor. This guide explains what the merchant reviews, why a recommendation may be withheld, and how shadow-pilot evidence informs a deliberate go-live decision.

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BEST FOR: BigCommerce merchants evaluating or running a supported pilot

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

Current availability

Access begins through the BigCommerce pilot waitlist. If a pilot is accepted and readiness is verified, setup is supported within the agreed scope. Available screens, connections, and controls depend on that scope. A written pilot plan or order form controls if it differs from this public guide.

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Start with the operating rule

The shopper wants one understandable price. The merchant still has to pay for the shipment that actually leaves the floor. Margin Safe Discounts is designed to connect those two facts without asking the warehouse to pretend every product fits a tidy box recipe.

For a supported pilot, the merchant approves the products, operating evidence, cost inputs, margin rules, and review boundaries. The platform evaluates selected carts in shadow mode first. It records what it would recommend, but nothing changes for the shopper until the merchant approves a live scope.

Unknown is not zero

If a required cost, shipping input, approval, or connection is missing, the protected offer is withheld. A cautious no-offer result is useful evidence, not a reason to invent a number.

Read the pilot workspace

The exact interface can change as the pilot is configured, but the workspace should help the merchant answer four practical questions.

The four operating views to review during a pilot	
View	Question it answers
Mode and scope	Is this observation-only, or has a defined live scope been approved?
Connection health	Are the store and rate sources included in this pilot available for the current decision?
Catalog readiness	Which selected products have enough trusted information for review, and what is missing from the rest?
Recent decisions	What was recommended or withheld, and what evidence should the team review next?

Labels may vary

Use the outcome and reason, not a screenshot or menu label, as the durable operating reference. Pilot screens may change as the product is tested and improved.

Follow one cart decision

A useful user guide should explain the decision without publishing the private models, parameters, rate data, or datasets behind it. The merchant-facing flow is straightforward.

- 1 Review the approved cart inputs**
Use the selected products, destination, shipping requirements, and product economics included in the pilot scope.
- 2 Compare practical shipment choices**
Consider the reviewed packout context and the parcel, LTL, palletized, or mixed options available for that order.

3 **Apply the merchant rules**

Evaluate the available customer value against the merchant-selected margin floor, eligibility rules, reserve treatment, and presentation limits.

4 **Recommend or withhold**

Return an eligible offer recommendation only when the required evidence and rules support it; otherwise record a clear reason for withholding it.

5 **Review what actually happened**

Where available, compare the recommendation with the final packout, shipment, carrier bill, and order outcome before changing future assumptions.

The team remains the authority

The platform supports a decision. The merchant approves the economics, and the warehouse approves what reflects the way the product really ships.

Know what is eligible and why

Eligibility is limited to the products, destinations, shipment modes, and checkout paths that have been included in the pilot and supported by the required information. A complete catalog is not required to learn from a useful sample.

1 **Ready for review**

The selected line has approved product economics, required shipping attributes, and reviewed packout evidence or operating context.

1 **Missing input**

A required cost, dimension, weight, origin, service requirement, or other approved input is absent or cannot be trusted.

1 **Outside scope**

The product, destination, checkout path, promotion, or shipping mode has not yet been approved for this pilot.

1 **No safe headroom**

The listed inputs and merchant rules do not support an eligible offer above the selected floor.

1 **Connection unavailable**

A required store, rate, or service connection did not return enough information for a protected decision.

A withheld recommendation protects the review

Do not turn missing evidence into an estimate that looks more certain than it is. Fix the input, narrow the scope, or leave the product at its normal price.

Understand what the shopper sees

In shadow mode, the shopper sees no change from Margin Safe Discounts. The merchant reviews recommendations beside the current checkout experience while the pilot gathers evidence.

After a live scope is approved and configured, shoppers see only the merchant-approved offer presentation. Product cost, carrier-account pricing, rate details, internal margin rules, and reasons one cart has more room than another remain private.

Every supported checkout path, promotion interaction, address change, and cart change should be verified in the merchant's own storefront before activation. An alternate path that cannot be verified should remain outside the live scope until it is tested.

Set the merchant controls deliberately

The pilot plan defines what safe means for the merchant. The exact controls depend on the approved implementation, but every live decision should have an owner, a documented value, and a review history.

Merchant controls to define before any live activation	
Control	What to decide
Protected margin floor	The selected contribution-margin boundary the eligible offer is not intended to cross, based on the listed inputs.
Eligibility scope	The products, destinations, shipment modes, and checkout paths that are allowed into the decision.
Cost and reserve treatment	Which approved cost inputs are included and how uncertainty or expected variance is handled.
Offer presentation	The customer-facing amount, limits, minimum display rules, and merchant-approved language.
Launch and pause authority	Who can approve a live scope, narrow it, return it to observation, or stop it where the configured controls support that action.

A model is not a guarantee

The protected margin floor is evaluated from the inputs and rules available to the service. Incorrect inputs, excluded lines, carrier changes, and costs outside the configured model can change the realized result.

Keep the warehouse as a source of truth

Packing evidence should reflect approved real practice. Review example packouts with the people who pull, protect, box, palletize, measure, weigh, and hand off the shipment. They will see constraints that a catalog export cannot.

1 Before the decision

Use reviewed packout evidence or approved operating patterns for the selected products.

1 On the floor

Record the final handling units, dimensions, scale weight, condition, and photos where the pilot calls for them.

1 After shipment

Compare planned and actual packout, then review material variance before updating any future assumption.

1 For the record

Keep shipment identifiers, documents, tracking, invoices, and carrier-specific claim evidence linked where available.

Continue with the warehouse and evidence workflows:

- See the Margin Safe Packer workflow

<https://shipsafeoffers.com/packer>

- Read the quote-to-bill field note

<https://shipsafeoffers.com/blog/quote-to-bill-reconciliation>

Treat changes and no-offer results as new decisions

1 Cart or address changes

A changed order should receive a fresh decision or a documented no-offer result. Do not assume an earlier recommendation still fits.

1 Promotions and coupons

Review and test compatibility before activation. Do not assume a protected offer can safely combine with another promotion.

1 Rate or service changes

If a required source is unavailable or the available service no longer fits the scope, withhold the recommendation and record the reason.

1 Unexpected behavior

Use the configured pause or stop control where available, preserve the affected examples, and contact support before widening the live scope.

Reliability posture

The service is designed to fail closed: when a required live rate, cost, approval, or connection is unavailable, the protected offer is withheld rather than computed unsafely. No public uptime guarantee applies to the free audit or shadow pilot.

Review evidence before changing the live scope

The useful question is not how many recommendations the platform produced. It is whether the team can explain the decisions, compare them with available actuals, and define where a controlled live use is ready.

1 Decision coverage

Which selected carts had enough trusted information to receive a recommendation?

2 Withhold reasons

Which missing inputs, connections, or scope boundaries appeared most often?

3 Packout and rate variance

Where did the planned shipment differ materially from the final operation or carrier bill?

4 Offer headroom

What customer value appeared under the selected inputs and merchant rules?

5 Go-live decision

Which products and paths are ready, which need revision, and which should remain out of scope?

Protect data and know where to get help

1 Payment details

Ship Safe Offers does not store payment-card details; the merchant's payment provider handles them.

1 Credentials and private rates

Do not place passwords, API keys, carrier credentials, customer labels, negotiated rates, or sensitive exports in a public form or ordinary email. Secure connection instructions follow an agreed pilot scope.

1 Business and derived data

The merchant owns the store, catalog, and order information used to run its business. The Terms and Privacy Policy explain rights in derived measurements, reconciliation outputs, accuracy metrics, and aggregated or de-identified learning data.

1 Deletion requests

Verified requests are handled under the published Account and Data Deletion policy, including stated timing and legal-retention exceptions.

1 Support

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

Use the current published policies for the controlling detail:

- Privacy Policy

<https://shipsafeoffers.com/privacy>

- Security and Trust Statement

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

- Support Policy

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

- Account and Data Deletion

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

- Terms of Service

<https://shipsafeoffers.com/terms>

RELATED RESOURCES

Furniture margin and freight: a worked \$2,000 example

See how product gross margin becomes a defined order contribution after delivery and payment costs.

<https://shipsafeoffers.com/blog/furniture-profit-margins-freight-costs>

Browse the margin and freight resource library

Use evergreen definitions, carrier-service checklists, shipment measurement guidance, and the price-floor formula.

<https://shipsafeoffers.com/resources>

Prepare a BigCommerce shadow pilot

Gather the sample, approved inputs, and review gates before anything connects.

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

See the complete platform

Follow the cart decision through booking, packout, delivery, and final-bill review.

<https://shipsafeoffers.com/platform>

Check a sample cart

Use the public illustrative calculator to understand the contribution-margin boundary.

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

SUPPORT: help@shipsafeoffers.com

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