

# **Intelligent Shipper**

# Booking Wizard User Guide Version 4.0

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Description	Instructs users how to create a single shipment at a time using the Booking Wizard functionality.
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## **1** Document Controls

#### **Version History**

Version	Amendments	Date	Author
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V2.0	Added multi-piece shipments functionality	24/12/2018	Deepa Sankaran
V2.1	Minor changes to Introduction and formatting	27/12/2018	Laura Lyonette
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	information on multi-piece		
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V3.0	Final version	28/01/2019	Deepa Sankaran
V4.0	Shipper reference 2 field added	09/09/2020	Laura Price

#### Review

Ite field			
Name	Title	Date Reviewed	Version Reviewed
Steve Sneath	Retail Solutions Consultant	24/01/2019	V2.2
Weronika Kucharska Customer Success Executive		23/01/2019	V2.2
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Lalitha Musnuri	Test Analyst	23/01/2019	V2.2
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#### **Referenced Documents**

Document Name	Version	Location (e.g. Link to Shared Drive, SharePoint etc.)
Intelligent Shipper Carrier	N/A	https://intersoftuk-servicedesk.atlassian.net/wiki/spaces/
Integrations and Features		EST/pages/716243076/Intelligent+Shipper+Carrier+
		Integrations+and+Features
User Roles Manual	V5.0	https://intersoftuk-
		servicedesk.atlassian.net/wiki/spaces/EST/pages/
		408944642/User+Roles+Manual+v2.0



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### 3 Introduction

Booking Wizard is a feature that facilitates manual booking of shipments one at a time within the Intelligent Shipper System. Customer User role can either create a single piece shipment or multipiece shipment using this functionality. This guide describes the steps to book shipments using the Booking Wizard feature.

## 4 Using the Booking Wizard to Book Shipments Individually

To book shipments one at a time using the Booking Wizard, follow the steps below:

- 1. Click on 'Shipment Processing' on the left pane menu
- 2. Click on 'Booking Wizard'

	Shipment Processing	(ins
TELEPHENT (1	Represent Basis Topday	Booking Wiczer Built Musiking III Scan Ungencessed Shipmones:
CURTOMER INFVICE CONSOLE	Processed Shipments (0)	Unprocessed Shipments (14)
	Last Sphared 25 Mag 2015/06 5032	Lant Updated 22 May 2018 BN 118 92
WARTENANCE	There are surrently no phymotry waiting close east	Trime Arona Mail + Yess Service
QUETATION		Dispane Care M Starfinger Kalle Ke Versikiratis

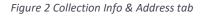
Figure 1 Shipment Processing Screen

- 3. The Booking Wizard screen has 4 tabs:
  - Collection Info & Address,
  - Destination Address,
  - Shipment Contents, and;
  - Review.

Enter the Shipper's information in the first tab (Figure 2) and once complete click on 'Next' to store the details and navigate to the 'Destination Address' tab.



() Collection Info & Address	(	Destination Address	3 Shipment Contents	(4) Review
Step 1	Reference *	Referen	:e2	
The Shipper	Department			
Please complete the shipper's information. This is the collection address for the shipment.	Contact Name	Testing Customer		]
The shipper will need a printer to print their labels and customs documents.	Company Name *	Intersoft Test Account		]
	Address *	Blays House		]
		Wick Road		Ĵ
				]
	Town *	Egham		]
	County			]
	Country *	United Kingdom		]
	Postcode *	TW20 9QP		
	Daytime Phone *	07577445896		]
	Email Address	testingcustomer@intersoft.co.uk		]
		Next >		



The following fields are within the Collection & Address tab:

Field Name	Description	Character
		Allowance
Reference*	Reference created by Shipper	20
Reference 2	For Royal Mail shipments for eBay orders, this	20
	must be populated with the eBay Virtual Tracking	
	Number (VTN).	
	For all other carriers this can be used to provide	
	any further identifiers in addition to shipper	
	reference.	
Department	Department of where shipment is from	17
Contact Name	Contact name of Shipper	35
Company Name*	Company name of Shipper	35
Address*	Company's Shipment Address	35
Town*	Town in which company is located	20
County	County in which company is located	35
Country*	Country in which company is located	2
Postcode*	Company's Postcode	10
Daytime Phone*	Daytime telephone number of Company contact	20
Email Address	Email address of company contact	254

Figure 3 Collection & Address tab – Field name, description

Note:

- Mandatory fields are marked with an asterisk; please note customer user types are required to be linked to a customer account. The information displayed for Company Name, Address, Town, County, Country and Postcode is taken from the customer account file.
- 4. Enter the relevant receiver's details as required in the 'Destination Address' tab.



🚊 Booking Wizard				
Deshboard / Shipmant Processing / Deaking Wound				
Collection info & Address		② Destination Address	(3) Shipment Contents	<li>Review</li>
	Contact Name	jane Doe		
Step 2		At least one name is required for contact or company name		
The Receiver	Company Name	ABC		
Please complete the receivers address in full, ensuring all fields marked with a * are completed.	Company Name	Ad.		
	Country *	US - United States of America	~	
	Address <sup>10</sup>	1088 West Marine		
	Town *	Houston		
	1044	nausan		
	State *	TX - Tecas	~	
	Zip Cade *	77002		
	Daytime Phone *	0019659899692		
	Ensail Address	Jane@email.com		
		Next >		

#### Figure 4 Destination tab

The following fields are in the Destination Address tab:

Field name	Description	Character	
		Allowance	
Contact Name	Recipient's Primary Contact for the shipment	40	
Company Name	Recipient's Company Name	35	
Country*	Recipient's Country location (selected from drop down	2	
	box). 'State' and 'Zip Code' field name dynamically		
	changes to reflect country.		
Address*	Recipient's Customer's Address	35	
Town*	Recipient's Customer's Town	20	
County Recipient's County. This field name dynamically changes		35	
	to reflect country.		
Post Code	Recipient's Post Code. This field name dynamically	10	
	changes to reflect country.		
Daytime Phone*	Recipient's Primary Contact telephone number	20	
Email Address Recipient's Primary Contact email address			

Figure 5 Destination tab - Field name, description

Note:

- Mandatory fields are marked with an asterisk.
- Depending on which Country is selected the County and Postcode field names dynamically changes to reflect country.
- 5. In the 'Shipments Contents' tab; Enter details of the shipment contents such as description, value and weight in the Shipment Contents tab.



Booking Wizard					€ Carto
Collection Info & Address	<li>2 Destination</li>	on Address	Shipment Contents	(d) Review	
Step 3 Shipment Contents & Value News advances the default of shares, strans, from it granged, what remains and share to a work. Please complexe all registrat(?) Felds.	Contarts Type * Sensend Gaede Decorytrian * Packages *	Documents Observents - NCV Documents - NCV L		Possaging Wingths       lig         on       X       H	
	Contorna Value Yotal Weight *	a car			

Figure 6 Shipment Contents tab

The following fields are within the "Shipment Contents" tab:

Field name	Description					
Content Type	Type of contents within the shipment. Drop down box which					
	display choices of:					
	Non-Documents					
	Documents					
	High Value					
General Goods Description	General description of goods within the shipment field is enabled					
	when Non-Documents or High Value is selected in Content Type					
	field. If the "documents" option is selected, then this field will					
	display "Documents -NCV".					
Customs Value	Value of shipments for customs clearing					
Total Weight	Total weight of shipment					

Figure 7 Shipment Contents tab - Field name, description

The Packages section has some mandatory fields, mandatory data needs to be entered to go to the next screen, to add another item click on 'Add another shipment item'.

Packages *	
Ū	Package Type   Qty *   1   Packaging Weight   kg
	L       cm       x       W       cm       x       H       cm
	Package item information
	Description *
	Qty * Val * GBP Weight kg
	HS Code SKU - Select Country of Origin -
	Add another shipment item

Figure 8 Packages Section

6. The Package section supports multi-piece shipment data and can accept values between 1 and 9 in the "Qty" field. On clicking the "Next" button, if the given value is not within the range an error is returned, "Please enter 9 or less". In this scenario, you can correct the quantity entered and re-try the "Next" button.



- 7. Likewise, the "Qty" of items entered must not be less than the number of pieces entered. On clicking the "Next" button, if the entered items are less than the number of pieces, an error is returned "Total number of items cannot be less than the total number of pieces". In this scenario you can correct the quantity entered and re-try the "Next" button.
- 8. On processing a multi-piece shipment data, if the Item information is provided then the items will be distributed out across the pieces ensuring 1 item is assigned to each piece. If there are any remaining items, then it is assigned to the first piece of the shipment. If an integrated label format is being used, then the order information section of each label produced will show the items that have been distributed to each piece. Please see 'Label Example' below.

The dimensions of each piece or package is calculated by the given shipment dimension divided by the number of pieces. Please refer to the online help center to see the list of carriers that supports multi-piece shipments.

Packages *	
	Box Qty * 2 Packaging Weight 0.5 kg
	L       10       cm       X       W       10       cm       X       H       20       cm
	Package item information
	Iphone8
	Qty *       1       Val *       250       GBP       Weight       0.2       kg
	123456       456789       GB - United Kingdom
	Iphone9
	Qty *       1       Val *       250       GBP       Weight       0.2       kg
	123456       456790       GB - United Kingdom
	Add another shipment item

Figure 9 Example Multi-Piece Shipment with two shipments

A review of the booked shipment can be visualised as per example below. For multi-piece shipment booking only services that are enabled for multi-piece shipments will be displayed. To select the appropriate service for the shipment, identify the required row and click 'Confirm Booking' to be taken to the 'Confirmation page' where your labels can be printed.



Booking Wizard							€ Cancel
Collection Info & Add	tress	2 Destination Address		③ Shipment Conte	ents	() Rev	iew
Step 4 Review Pase releasings: Use the large approx Case the "Senter Brown" for better better yor brown grand grand the dropped Brownies.	Collection Info & Address Collection Info & Address Collection 128 Internet 128 Internet Ray Inson Ray Inson Ray Info Info Info Info Ray Info Info Info Info Ray Info Info Info Contact Test Canona Insul Info Info Info		Destination Address jure like ADC MORT Market Mark Market Mark Market Market D CMARCA Market (Market Market (Market Market (Market Market (Market) Market (Market)			Shipment Contents Contents Contents Contents Contents Content	
		Plaase salest t	Select your service	ahipmans.			
Service			87D	Price	Agent		
0.0			25 May 2015				Confirm Booking

Figure 10 Review tab

10. A tracking number will be provided on the confirmation page. When you click 'Print Your Label', a label will be downloaded in a pdf format which can be printed. An example screen of the confirmation page is given below.

Booking Wizard - Confirmation 🕖	
Confirmation       Thank you.       Your Tracking Number for this shipment is:       T660001678908       Please attach the tracking label to the package.       Please ensure your goods are sufficiently packed for delivery.	Print your Shipping Label
	Print Your Label

Figure 11 Confirmation

### 4.1 Label Examples

An example of a standard label is shown below.



International Priority	Postage on Account GB
	AIR MAIL PAR AVION
28-070 338 6001-000 013 86F	TG 6000 1678 9GB
Jane Doe ABC 1088 West Marine Houston 77002	RIITURN TO: Return Hub., Return Services, 4th Floor, 10 Brock 01, Ilipham, TW20 0HJ, 0B
Customer reference: 123 Department reference:	

Figure 12 Standard Label

An example of an integrated label for a multi-piece shipment is shown below:





Figure 13 Multi-Piece Shipment Integrated Label

### 4.2 CN23 Documentation

Some destinations will require CN23 documentation. Intelligent Shipper will produce the correct number of CN23 documents for the destination country with the delivery label. An example of CN23 documentation is given below.



	5000	16789	GE	3 3					
FROM	Interse Blays Englei Wick f Eghar TW4 5	House field Greer Road n					VAT/EORI Number		
Custor	ABC 1088 1 Houst 77002 Conta Email:	1088 West Marine Houston 77002 United States of America Contact Tel: 0019659999692 Email: Jane@email.com							
	RN TO SET	otions in or NOER	10 631	non-del	Ivery				
Catego	ory of iter	n6: DOCU	MENTS	S-NCV					
								cial items only	
	ion of conte	ent	Сtу	Net Kg		HS Tarifi No	Country of	of Manufa	act.
Document			1	1.000	0.00		69		_
			-						-
Postage	Eas				Total Con	aa Weight		1.000	i Ka
License									
Certificate					Campania				
Invoice									
	a Dass of I carify that the particulars given in this customs declaration are convex and this har does not contain any dangerous anticles prohibited by inglation or by possil or customs regulations. Date and render's name:								
	22/05/2018 Test Customer								

Figure 14 CN23



# 5 Appendix-Glossary

Term	Definition
Booking Wizard	Shipments will be processed, and labels will be produced on booking confirmation.
Multi-Piece Shipment	A Shipment that contains more than one package/piece which is sent to the same destination.
Customer User	The core users of the system who will be creating, processing and closing out shipments. This user role will be assigned to a customer account. Please check the user roles manual for further reference.