Intelligent Shipper

Booking Wizard User Guide Version 4.0

Document Owner	INTERSOFT Systems and Programming Limited
Version	4.0
Date	09/09/2020
Description	Instructs users how to create a single shipment at a time using the Booking Wizard functionality.
Author	Laura Price

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1 Document Controls

Version History

Version	Amendments	Date	Author
V1.0	Initial Document	26/6/2018	Anna Diaz
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
V2.2	Minor changes to include additional information on multi-piece	18/01/2019	Deepa Sankaran
V2.3	Review comments update	25/01/2019	Deepa Sankaran
V3.0	Final version	28/01/2019	Deepa Sankaran
V4.0	Shipper reference 2 field added	09/09/2020	Laura Price

Review

Name	Title	Date Reviewed	Version Reviewed
Steve Sneath	Retail Solutions Consultant	24/01/2019	V2.2
Weronika Kucharska	Customer Success Executive	23/01/2019 25/01/2019	V2.2 V2.3
Lalitha Musnuri	Test Analyst	23/01/2019 25/01/2019	V2.2 V2.3

Referenced Documents

Document Name	Version	Location (e.g. Link to Shared Drive, SharePoint etc.)
Intelligent Shipper Carrier Integrations and Features	N/A	https://intersoftuk-servicedesk.atlassian.net/wiki/spaces/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 multi-piece 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
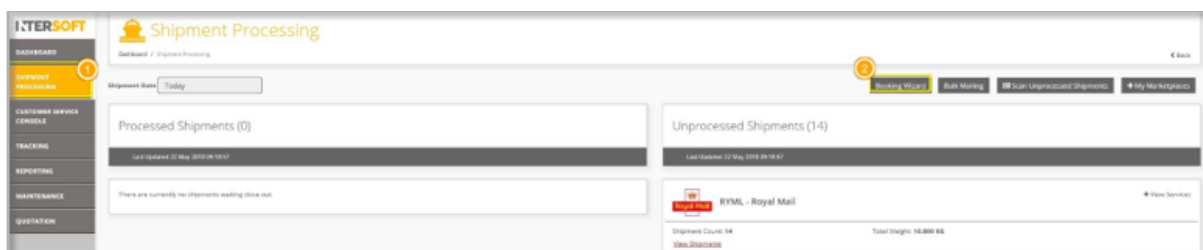2. Click on 'Booking Wizard'

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.

Figure 2 Collection Info & Address tab

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 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.	20
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.
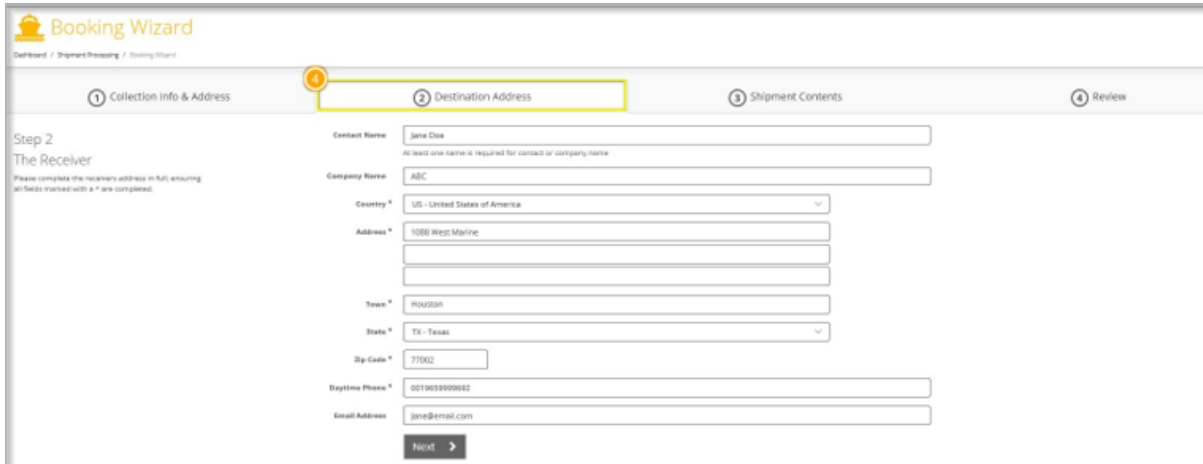
Figure 4 Destination tab

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 box). 'State' and 'Zip Code' field name dynamically changes to reflect country.	2
Address*	Recipient's Customer's Address	35
Town*	Recipient's Customer's Town	20
County	Recipient's County. This field name dynamically changes to reflect country.	35
Post Code	Recipient's Post Code. This field name dynamically changes to reflect country.	10
Daytime Phone*	Recipient's Primary Contact telephone number	20
Email Address	Recipient's Primary Contact email address	254

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.
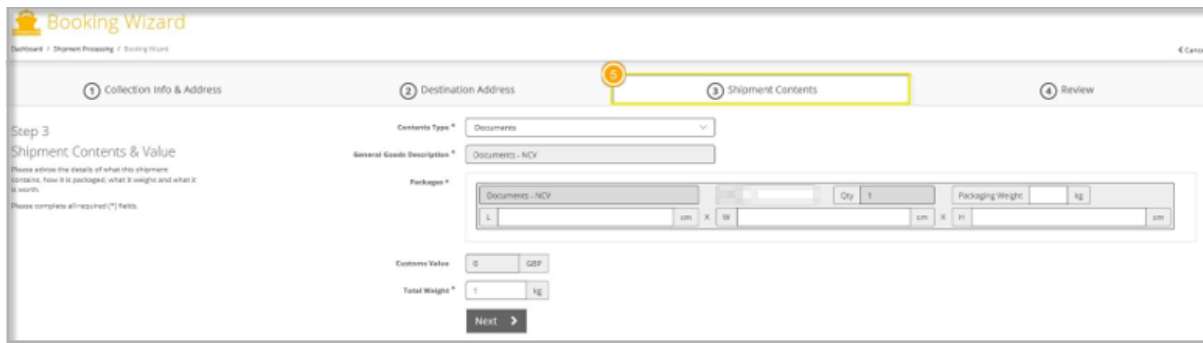
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Figure 6 Shipment Contents tab

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'.
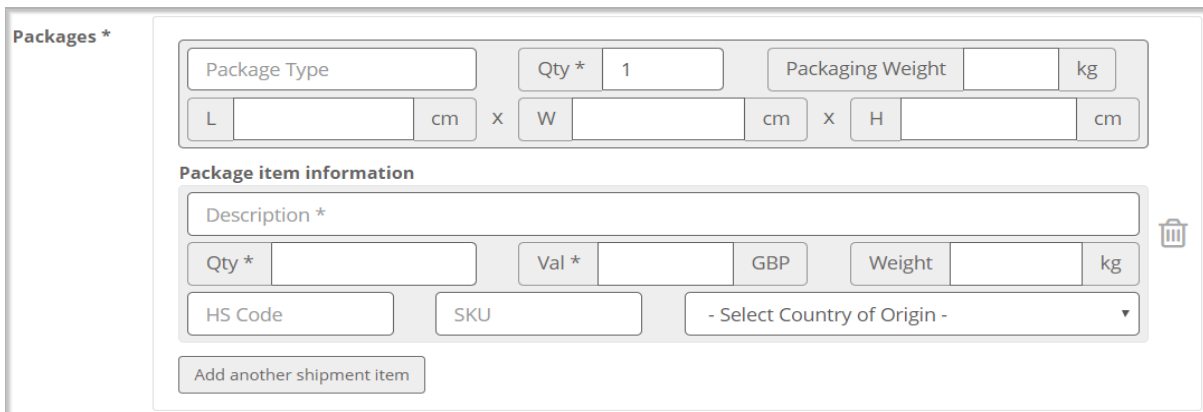

Figure 8 Packages Section

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.

Figure 9 Example Multi-Piece Shipment with two shipments

9. 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.
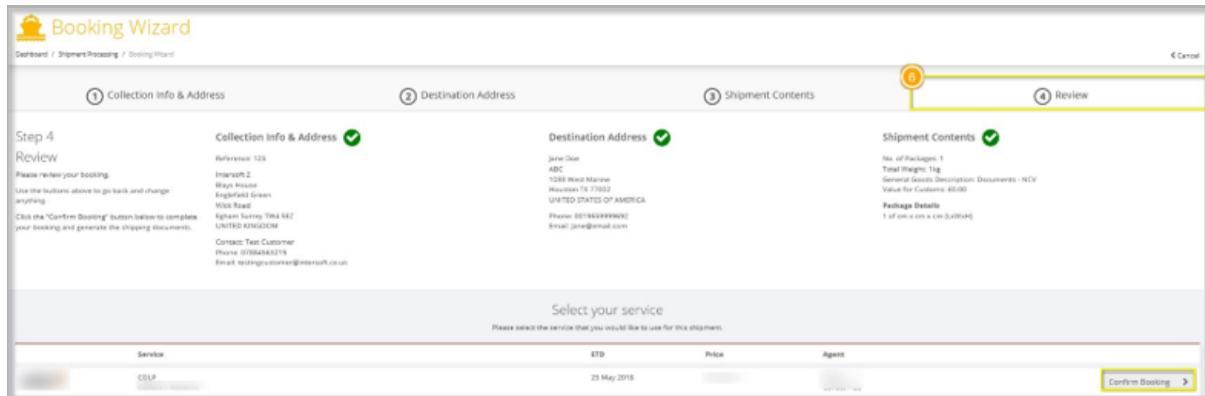
Figure 10 Review tab

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.
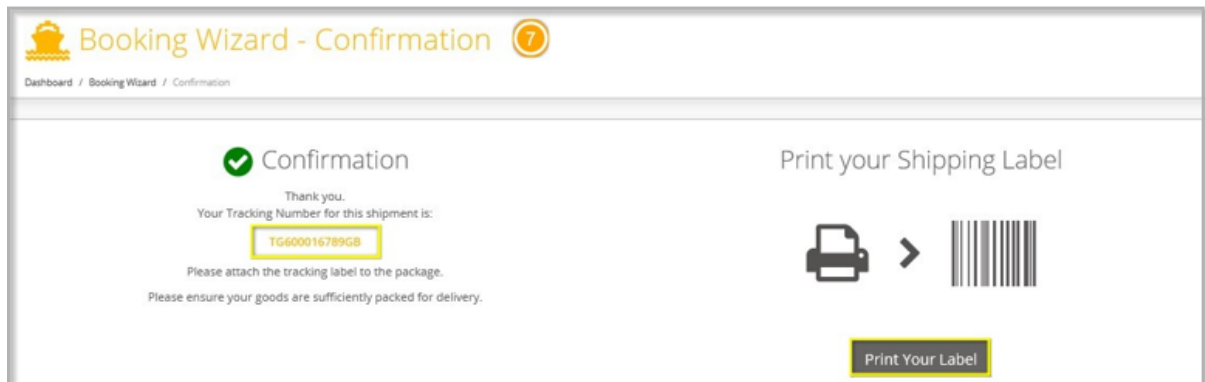

Figure 11 Confirmation

4.1   Label Examples

An example of a standard label is shown below.

Figure 12 Standard Label

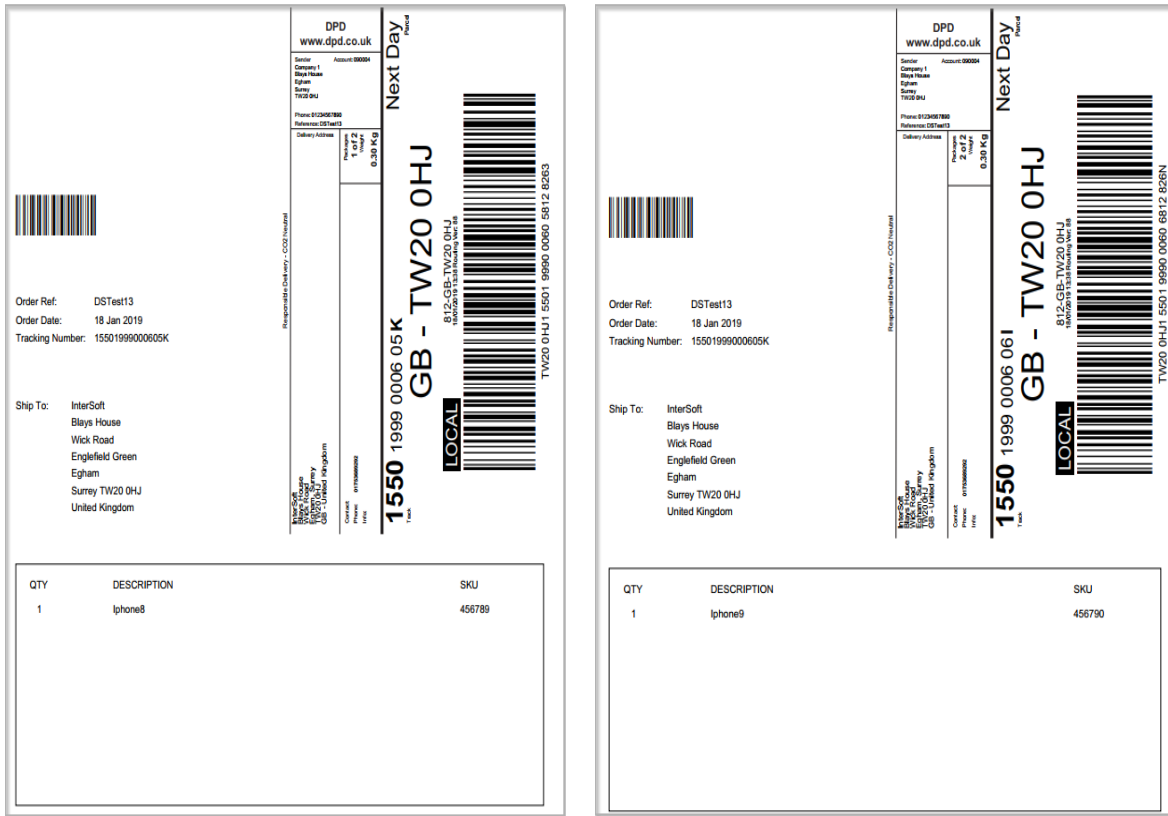An example of an integrated label for a multi-piece shipment is shown below:

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.

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.