

Intelligent Shipper

Bulk Upload Shipments V3.0

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1 Document Controls

Version History

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Review

Name	Title	Date Reviewed	Version Reviewed
Steve Sneath	Retail Solutions Consultant	24/01/19	V0.7
Weronika Kucharska	Customer Success Executive	25/01/19	V0.7, V0.8
Lalitha Musnuri	Test Analyst	25/01/19	V0.7, V0.8
Laura Lyonette	Senior Business Analyst Team Lead	12/07/2019	3.0

Referenced Documents

Document Name	Version	Location (e.g. Link to Shared Drive, SharePoint etc.)
Shipment Scan to Print v1.0	1.0	https://intersoftuk-servicedesk.atlassian.net/wiki/spaces/EST/pages/66322475/Shipments+Scan+to+Print+v1.0
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	v1.0	https://intersoftuk-servicedesk.atlassian.net/wiki/spaces/EST/pages/408944642/User+Roles+Manual+v1.0

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3 Introduction

Bulk Mailing is a feature in the Intelligent Shipper System that enables Customer User role to create shipments by uploading a shipment data file. You can either create a single piece shipment or a multi-piece shipment using this functionality. This guide instructs Customer users how to use the “Bulk Upload Shipment” process within Intelligent Shipper.

4 Create a Bulk Mailing Template

Name	Import Profile ID	Type	Created By	Date	Changed	Last used	Shared	
Test abc	6df29fa8-86db-4a1a-b5da-b5e8c59503eb	Domestic	Shayne Cabral	09/07/2019	09/07/2019	09/07/2019		Example (CSV)
Testing Repack	6b6e7573-7ae1-4179-b1c4-db17ed9f33cf	Domestic	Deepali Support	28/06/2019	09/07/2019	03/07/2019	✓	Example (CSV)
Package Type International	ad4a4d24-6738-43df-9326-ace8a223a426	International	Praveena	26/06/2019	27/06/2019	27/06/2019	✓	Example (CSV)
Package types domestic	26ae4136-a7a1-4d68-b4ee-4ce3dbac5c2d	Domestic	Praveena	26/06/2019	26/06/2019	26/06/2019	✓	Example (CSV)
test veronika	5891de33-6ef5-4fbb-aaba-1193f85d4058	Domestic	Weronika	17/05/2019	27/06/2019	18/06/2019	✓	Example (CSV)
INTDOParcelForce	1688bbc6-2efc-463b-b527-e724e0a64e4	International	Lalitha Musnuri	16/05/2019	16/05/2019	09/07/2019	✓	Example (CSV)
Catalogue Biscuitteers	13c2ac01-0112-45ab-9b2c-5ceaaa7a45db	Domestic	TechSupport	02/04/2019	02/04/2019	02/04/2019	✓	Example (CSV)
International_29032019	1b82d9f9-9363-4919-907d-570020b95099	International	Test Customer	01/04/2019	07/06/2019	07/06/2019	✓	Example (CSV)
Domestic29032019	bae00fc6-ddcc-4169-9783-47c238dc2a28	Domestic	Test Customer	29/03/2019	07/06/2019	07/06/2019	✓	Example (CSV)
Domestic required fields only	531c3fee-fb01-42a1-b48c-f58d8e35e62e	Domestic	Laura Lyonette	26/03/2019	04/07/2019	09/07/2019	✓	Example (CSV)
test dom-intl	38249442-ffc4-476a-b572-92881030f6ac	Domestic	Test Customer	26/02/2019	26/02/2019	26/02/2019	✓	Example (CSV)
WK_TJC_Test	45ae3b76-a631-45aa-a1e1-e936cc9c1ff8	International	Test Customer	19/02/2019	19/02/2019	19/02/2019	✓	Example (CSV)
MRIAH LIVE TEST	c6388265-8b17-4dd7-acfe-ab95c042864a	International	Test Customer	14/02/2019	---/---/---	15/02/2019	✓	Example (CSV)
TEST - DOMESTIC TEMPLATE TYPE USING INTERNATIONAL SHIPMENTS	b6b3572b-3f7a-45e9-8ecc-19f0acc8e813	Domestic	Faris Customer Test	21/12/2018	07/01/2019	19/02/2019	✓	Example (CSV)
Hermes Test Pack Multi-piece	e0af3f0a-3ce0-4804-af54-c1f9d3e9fa0d	Domestic	Lalitha Musnuri	18/12/2018	18/12/2018	21/03/2019	✓	Example (CSV)
Multi-Piece No Item Info	58c30578-78c4-4e5e-bf2d-c50ab977a642	Domestic	Lalitha Musnuri	11/12/2018	09/07/2019	07/05/2019	✓	Example (CSV)

Figure 1- Bulk Mailing Templates

Before uploading bulk shipments, you will need to setup a bulk mailing template in Intelligent Shipper to match the format of the shipment data file you will be uploading.

To create a bulk mailing template, complete the steps below:

1. Navigate to the Maintenance menu
2. Click on Bulk Mailing Templates
3. And click Add Template

This will then take you to the Add Bulk Mailing Template screen.

4.1 Add Bulk Mailing Template

The screenshot shows the 'Add Bulk Mailing Template' interface. On the left is a sidebar with navigation options: DASHBOARD, SHIPMENT SEARCH, SHIPMENT PROCESSING, TRACKING, REPORTING, MAINTENANCE (highlighted), Address Book, Bulk Mailing Templates (highlighted), Departments, Goods Descriptions, Hold Reasons, Label Options, Package Types, Services, Silent Printing, Tracking Milestones, and Users.

The main content area is titled 'Add Bulk Mailing Template' and includes a breadcrumb trail: Dashboard / Maintenance / BulkMailingTemplate / Add Bulk Mailing Template. A 'Back' button is in the top right.

The form contains the following fields:

- Template name * (text input)
- File format (dropdown menu, currently set to 'CSV (Comma Separated)')
- Template type (dropdown menu, currently set to 'DOMESTIC')
- Unit weight (dropdown menu, currently set to 'KG (Kilos)')
- Unit length (dropdown menu, currently set to 'CM (Centimetres)')
- Share this template (checkbox, currently unchecked)
- Save (button)
- Cancel (button)
- Information (icon)

Below the form are two tables:

Selected Fields (0 of 13 Required Fields Selected, 0.00% progress bar)

Name	Max Length	Required

Available Fields (Filter: Required Conditional Optional)

Name	Max Length	Required
Filler	N/A	Optional
Receiver Contact Name	40	Conditional
Receiver Company Name	35	Conditional
Receiver Address Line 1	35	Required
Receiver Address Line 2	35	Optional
Receiver Address Line 3	35	Optional
Receiver Town	30	Required
Receiver State/Country	35	Optional
Receiver Post/Zip Code	10	Required
Receiver Country Code	2	Required

Figure 2- Add Bulk Mailing Template

In the Add Bulk Mailing Template screen:

1. A template name is required
2. Specify the format of the file which you will be uploading. Intelligent Shipper supports CSV (Comma Separated), PIPE Separated and ASCII fixed length file formats.
3. There are 2 types of template. Domestic and International. International template has extra required fields needed to send shipments abroad.
4. The available Units of weight are: KG(Kilos), G(Grams).
5. The available Units of length are: CM(Centimetres), MM(Millimetres).
6. The option to share this template with other team members is available.
7. The newly created template cannot be saved unless all required fields are selected
8. All required fields must be selected. A progress bar indicates if all required fields have been selected. This bar should be at 100% before a template can be saved.
9. If a Conditional field is selected, then it may require other fields. E.g. Item Description requires item value and weight. In this case, if the relevant conditional fields are not selected then it will display an error as shown below.

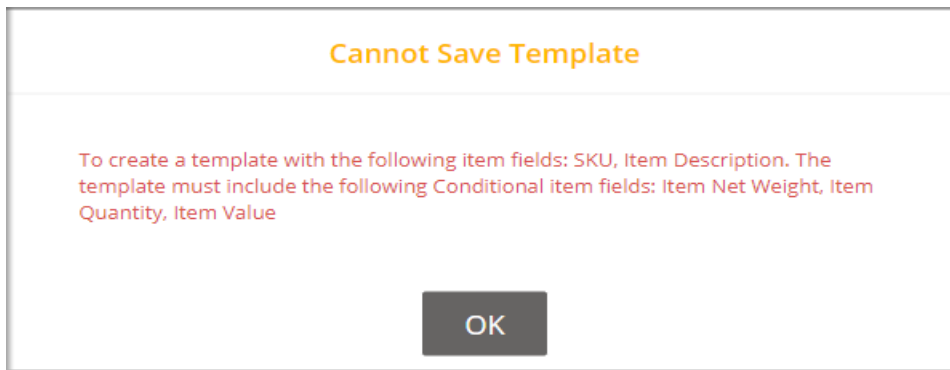


Figure 3- Conditional Field Error

10. Optional fields are truly optional, if they are not select there is no impact to template functionality
11. A newly created Bulk Mailing Template may be saved once all required fields have been selected
12. Click on the back button to go back the Bulk Mailing Templates screen

4.2 Selecting fields for the Bulk Mailing Template

Selected Fields			All Required Fields Selected		100.00%		Available Fields			Filter: <input type="checkbox"/> Required <input type="checkbox"/> Conditional <input type="checkbox"/> Optional		
Name	Max Length	Required					Name	Max Length	Required			
1 Receiver Address Line 1	35	Required					Filler	N/A	Optional			
2 Receiver Country Code	2	Required					Receiver Address Line 2	35	Optional			
3 Receiver Post/Zip Code	10	Required					Receiver Address Line 3	35	Optional			
4 Receiver Contact Name	40	Conditional					Receiver State/County	35	Optional			
5 Receiver Telephone	20	Required					Safe Place	30	Optional			
6 Filler	N/A	Optional					Shipment Date (DD/MM/YYYY)	10	Optional			
7 Receiver Town	30	Required					Customer Department Code	17	Optional			
8 Receiver Email Address	254	Required					Shipper's Contact Name	40	Optional			
9 Shipment Weight	7	Required					Shipper's Contact Phone	20	Optional			
10 Shipment Type	3	Required					Service Level	2	Optional			

Figure 4- Field Selection for the Bulk Mailing Template

1. From the Available Fields table, as fields are selected these will move across into the Selected fields table.
2. "All required fields selected" progress bar in the example above is now Green and 100% indicating the template can now be saved.
3. The order of the upload file must match the order of the template that has been saved i.e. if the shipper's reference is in the first column in the template then the same must be given as the first column in the upload file.
4. Fillers can be used for any fields that will be given in the upload file but are not in the available field list. For e.g. "upload date" is not available in the available field list but if it will be used in the upload file then a "Filler" field can be used. The filler can also be used to pass blank values, so that you do not need to manually edit your upload file before uploading it.

4.2.1 Adding a default value to a selected field

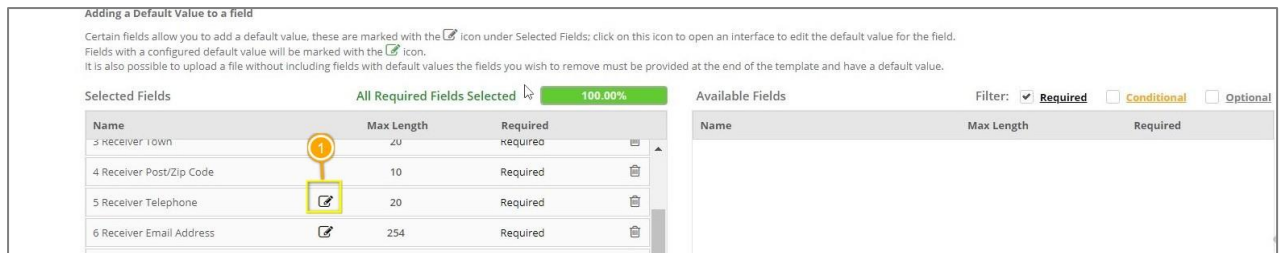


Figure 5- Default Values

1. A default value can be added by clicking on the icon in the image above. On clicking the icon, the Default Value option appears as below in the Shipment Service example. The default value will be used as a replacement if the corresponding field value is left blank in the upload file. Please note that the field name must still be provided in the upload file and cannot be taken out from the upload file even if there is a default value.



Figure 6- Default Value for the Shipment Service Field

You can enter the default value in the field provided.

2. For the “Number of Pieces” field the default value must be set to a value between 1 and 9. On clicking the “Save” button, if the given value is not within the range an error is returned, “Number of pieces must range between 1 and 9”. In this scenario, you can correct the number of pieces entered and re-try the “Save” button.
3. Likewise, in the Shipment Service field only valid services can be entered as default value. On clicking the “Save” button, if the given service code is invalid an error is returned, “The shipment service code is not valid”. In this scenario, you can correct the shipment service entered and re-try the “Save” button.

NOTE: Valid services mean the service codes assigned in the Intelligent Shipper to your account. The assigned service codes can be found in the “Maintenance->services” section of the Intelligent Shipper.

4.2.2 Bulk Mailing Templates

Bulk Mailing Templates									
Dashboard / Maintenance / Bulk Mailing Templates									
Show only my templates + Add Template									
Name	Import Profile ID	Type	Created By	Date	Changed	Last used	Shared		
User Guides	6df29fa8-86db-4a1a-b5da-b5e8c59503eb	Domestic		09/07/2019	09/07/2019	09/07/2019		Example (CSV)	
	6b6e7573-7ae1-4179-b1c4-db17ed9f33cf	Domestic		28/06/2019	09/07/2019	03/07/2019	✓	Example (CSV)	
	ad4a4d24-6738-43df-9326-ace8a223a426	International		26/06/2019	27/06/2019	27/06/2019	✓	Example (CSV)	
	26ae4136-a7a1-4d68-b4ee-4ca3dbac5c2d	Domestic		26/06/2019	26/06/2019	26/06/2019	✓	Example (CSV)	
	5891de33-6ef5-4fbb-aaba-1193f85d4058	Domestic		17/05/2019	27/06/2019	18/06/2019	✓	Example (CSV)	
	1688bbc6-2efc-463b-b527-e7242e0a64e4	International		16/05/2019	16/05/2019	09/07/2019	✓	Example (CSV)	
	13c2ac01-0112-45ab-9b2c-5c8aaa7a45db	Domestic		02/04/2019	02/04/2019	02/04/2019	✓	Example (CSV)	
	1b82d9f9-9363-4919-907d-570020b59599	International		01/04/2019	07/06/2019	07/06/2019	✓	Example (CSV)	
	bae00fc6-ddcc-4169-9783-47c238dc2a28	Domestic		29/03/2019	07/06/2019	07/06/2019	✓	Example (CSV)	
	531c3fee-ff01-42a1-b48c-f58d8e35e62e	Domestic		26/03/2019	04/07/2019	09/07/2019	✓	Example (CSV)	
	38249442-ffcd-476a-b572-92881030f6ac	Domestic		26/02/2019	26/02/2019	26/02/2019	✓	Example (CSV)	
	45ae3b76-a631-45aa-a1e1-e936cc9c1ff8	International		19/02/2019	19/02/2019	19/02/2019	✓	Example (CSV)	
	c6388265-8b17-4dd7-acef-ab95c042864a	International		14/02/2019	-/-/-	15/02/2019	✓	Example (CSV)	
	b6b3572b-3f7a-45e9-8ecc-19f0acc8e813	Domestic		21/12/2018	07/01/2019	19/02/2019	✓	Example (CSV)	
	e0af3f0a-3ce0-4804-af54-c1f9d3e9fa0d	Domestic		18/12/2018	18/12/2018	21/03/2019	✓	Example (CSV)	
	58c30578-78c4-4e5e-bf2d-c50ab977a642	Domestic		11/12/2018	09/07/2019	07/05/2019	✓	Example (CSV)	

Figure 7- Bulk Mailing Templates

The recently created template will be displayed on the Bulk Mailing Templates screen. You can download a sample file for the template, to compare this to your shipment data file and ensure the template matches the file you will be uploading.

To download a sample file:

1. Find your template
2. Click on Example (CSV)
3. An example csv will be provided. You can compare this against the shipment data file you will be uploading to ensure that the two file formats match.

NOTE: If the shipment data file you upload does not match the bulk mailing template, then the system will display an error when you try and upload the file.

```
UserGuide v.02.csv - Notepad
File Edit Format View Help
Receiver Contact Name,Receiver Address Line 1,Receiver Town,Receiver Post/Zip Code,Receiver Telephone,Receiver Email Address,Shipper's reference,Sh
Example Contact,62 High St+J2B2:J3F2B2:S2B2:JB2:M2,Staines,TW18 4DY,1935654865,Ranjit.Dhani@intersoft.co.uk,MyRef1,CRL1,1,1.2,NDX,Mobile Assets,200
Example Contact,62 High St+J2B2:J3F2B2:S2B2:JB2:M2,Staines,TW18 4DY,1935654865,Ranjit.Dhani@intersoft.co.uk,MyRef2,CRL1,1,1.2,NDX,Mobile Assets,200
```

Figure 8- Example CSV (opened with notepad)

4.2.2.1 Bulk Mailing Multi-Piece Shipment Template

Intelligent Shipper allows you to create multi-piece shipments. These are shipments that contain more than one piece (package) that are all shipped to the same destination address. E.g. If one order is split across multiple packages. If the upload file contains the same shipper reference number and has the number of pieces greater than 1, then it identifies as a multi-piece shipment.

	A	B	C	D	E	F	G	H	I
1	Shipper's reference	Receiver Contact Name	Receiver Address Line 1	Receiver Address Line 2	Receiver Town	Receiver Post/Zip Code	Receiver Telephone	Receiver Email Address	Number Of Pieces
2	D1809955	Example Contact	62 High St	Address 2	Staines	TW18 4DY	1935654865	example.contact@example.com	2
3									
4									
5									
6									
7									
8									

Figure 9- Example MPS File

In the above example multi-piece shipment file

1. It uses the same shipper reference number
2. The number of pieces is greater than 1

5 Uploading Bulk Mailing Shipments

Figure 10- Shipment Processing Screen

1. Click on the Bulk Mailing button on the Shipment Processing screen

5.1 Upload New Data File

Figure 11- Upload New Data File Button

Click on Upload New Data File to open the screen.

INTERSOFT

Upload New Data File

Dashboard / Bulk Mailing / Upload New Data File

Project Name

File * Browse...

Email Address

Has header row? This will be ignored for ASCII upload files

Upload Template -- Select a upload template --

Upload Type Bulk Mailing

Upload File

Figure 12- Upload New Data File Screen

In the Upload New Data File screen:

1. Enter a Project Name, this field is not required, but if provided the project name will be displayed on the Dashboard->Shipment Processing->Bulk Mailing where you can download the labels generated.
2. Browse the file to be uploaded.
3. If an email address is provided, then an email notification will be sent confirming the file was successfully processed.
4. If the file has headers, select the 'Headers' tick box. By default, the header row will be ignored for ASCII upload files.
5. Select the Bulk Mailing template used to create the (.CSV/PIPE separation/ASCII fixed length) file. The uploaded file must match a bulk mailing template in Intelligent Shipper.
6. The "Upload Type" can be Unprocessed or Bulk mailing.
 - If you have chosen to upload the shipments as Unprocessed - labels will not be generated. These shipments can be scanned later to produce labels.
 - If Bulk Mailing is selected then shipments will be processed, and labels will be produced on upload.
7. Click on "Upload file".

5.2 Data File does match the Upload Template

The screenshot shows the 'Upload New Data File' interface. At the top, there is a message box with the text: "The uploaded file does not match the bulk mailing template selected." Below this, the form includes the following fields:

- Project Name:** A text input field.
- File *:** A file selection button labeled "Browse..." followed by a greyed-out area.
- Email Address:** A text input field.
- Has header row?:** A checkbox labeled "This will be ignored for ASCII upload files".
- Upload Template:** A dropdown menu currently set to "Default Domestic Template".
- Upload Type:** A dropdown menu currently set to "Bulk Mailing".
- Upload File:** A dark button at the bottom.

Figure 13- Upload file does not match error

On clicking upload file, if the file chosen does not match the Upload template, an error is returned, "The uploaded file does not match the bulk mailing template selected." In this scenario, you can:

- Select the correct template for your file
- Update your file to match the template
- Add a new Bulk Mailing Template.

The screenshot shows the 'Upload New Data File' interface with a sidebar on the left. The sidebar includes sections for DASHBOARD, SHIPMENT SEARCH, SHIPMENT PROCESSING (with sub-items: Booking Wizard, Bulk Mailing, Scanning, Manifest History), TRACKING, REPORTING, MAINTENANCE, and QUOTATION. The main content area shows an error message: "Your file has some errors. You can download errors and abort uploading or continue processing successful record." Below the message are two buttons: "Download errors" and "Continue processing successful records". The form fields are filled with the following data:

- Project Name:** User Guides
- File *:** Browse...
- Email Address:** Shayne.Cabral@intersoft.co.uk
- Has header row?:** This will be ignored for ASCII upload files
- Upload Template:** Updating User Guides
- Upload Type:** Bulk Mailing
- Upload File:** A dark button at the bottom.

Figure 14- Errors on Data File

If the file contains errors the following message will be displayed: "Your file has some errors. You can download errors and abort uploading or continue processing successful records" will be displayed.

1. Click on "Download errors" to download the file detailing the list of errors encountered and upload again
2. Click on "Continue processing successful records" to process records that were successfully uploaded.

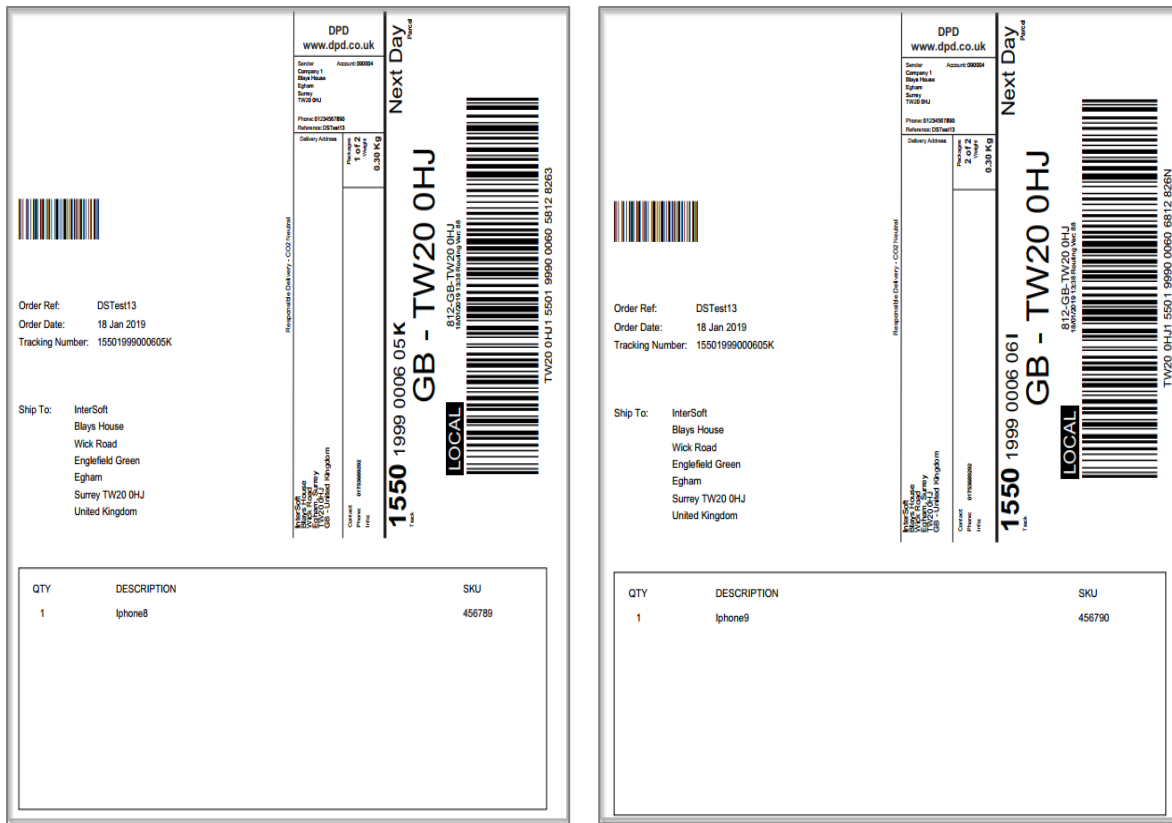


Figure 17- Multi-Piece Shipment Integrated Label

5.6 Bulk Mailing File Uploaded to Bulk Mailing - File with Errors

04 Jul 2019 13:16	Shahid-04/07/2019 13:16:00	Bulk Mailing	Complete	1	InternationalexampleFile.csv	  
04 Jul 2019 13:11	Shahid-04/07/2019 13:11:10	Bulk Mailing	Complete	0	InternationalexampleFile.csv	

Figure 18- Print Labels/Download Errors from Bulk Mailing Screen

If the file contained errors and the option to process successful records was chosen, you can:

1. Print/download the labels generated.
2. Download the errors.

Based on the download errors, the original upload file can be corrected and re-uploaded for the shipments that failed to upload.

5.7 Bulk Mailing File Uploaded to Unprocessed

24 May 2018 09:23	UserGuide Unprocessed	Unprocessed	Uploaded	2	UserGuide v.02.csv	Complete
-------------------	-----------------------	-------------	----------	---	--------------------	----------

Figure 19- Bulk Mailing file Uploaded to Unprocessed

If the upload type Unprocessed was chosen, the record will feature in the Bulk Mailing list with a status of complete.

To understand how labels can be generated for unprocessed shipments please refer to the “Shipment Scanning User Guide”.

6 Appendix 1 – Glossary

Term	Definition
Bulk Mailing (Upload Type)	Shipments will be processed, and labels will be produced on upload.
Unprocessed (Upload Type)	Shipments will be uploaded; however, labels will not be generated. These shipments can be scanned later to produce labels.
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.

7 Appendix 2 – Quick Reference Guides

Please see the quick reference list for bulk mailing.

7.1 Add a Bulk Mailing Template

To create a new template, in the Add Bulk Mailing Template screen:

1. A template name is required
2. The sample file can be downloaded in the formats: CSV (Comma Separated), PIPE Separated and ASCII fixed length
3. There are 2 types of template. Domestic and International. International template has extra required fields needed to ship shipments abroad.
4. The available Units of weight are: KG(Kilos), G(Grams).
5. The available Units of length are: CM(Centimetres), MM(Millimetres).
6. The option to share this template with other team members is available.
7. The newly created template cannot be saved unless all required fields are selected
8. All required fields must be selected. A progress bar indicates if all required fields have been selected. This bar should be at 100% before a template can be saved.
9. If a Conditional field is selected, then it will require other fields. I.e. Item Description requires item value and weight
10. Optional fields are truly optional, if they are not select there is no impact to template functionality
11. A newly created Bulk Mailing Template may be saved once all required fields have been selected
12. Click on the back button to go back the Bulk Mailing Templates screen

7.2 Upload New Data File

Project Name

File *

Email Address

Has header row? This will be ignored for ASCII upload files

Upload Template

Upload Type

To upload a Bulk Mailing file, in the Upload New Data File screen:

1. Enter a Project Name, this field is not required, but if provided the project name will be displayed on the Dashboard->Shipment Processing->Bulk Mailing where you can download the labels generated.
2. Browse the file to be uploaded.
3. If an email address is provided, then an email notification will be sent confirming the file was successfully processed.
4. If the file has headers, select the 'Headers' tick box.
5. Select the Bulk Mailing templated used to create the .CSV file. The uploaded file must match a bulk mailing template in Intelligent Shipper.
6. The "Upload Type" can be Unprocessed or Bulk mailing.
 - If you have chosen to upload the shipments as Unprocessed - labels will not be generated. These shipments can be scanned later to produce labels.
 - If Bulk Mailing is selected then shipments will be processed, and labels will be produced on upload.
7. Click on "Upload file".

7.3 Setting Default Values in Bulk Mailing Templates

When creating a Bulk Mailing Template in Intelligent Shipper, it is possible to set default values for some fields. If a default value is set, then when a Bulk Mailing file is imported and the field is left blank in the file then Intelligent Shipper will automatically populate the shipment record with the default value set for the field. This allows you to set commonly used values as default values in the template, reducing the manual editing needed to prepare a Bulk Mailing template.

This guide instructs Customer role users how to set default values when creating Bulk Mailing Templates, so that these can be used when importing Bulk Mailing files.

Create Bulk Mailing Template

To add a new Bulk Mailing Template, navigate to Maintenance > Bulk Mailing Templates and select the 'Add Template' button.

Add Bulk Mailing Template

Dashboard / Maintenance / BulkMailingTemplate / Add Bulk Mailing Template ← Back

Template name *

File format: Template type: Unit weight: Unit length: Share this template

You are responsible for ensuring the data you pass us is correctly formatted and accurate.
If you pass us data with field lengths greater than our MAX Field Lengths we will automatically truncate your data to our Field Lengths. Delivery time may be affected or shipments may be returned to you if your labels do not have the full and accurate delivery address.

Required fields with Conditional data requirements
Some fields are **Required** in the file format for both International and Domestic templates. These fields are marked as **Conditional** such as the Receiver Email Address. Hovering over a required status that is underlined will display more information on the field's requirements.

Adding a Default Value to a field
Certain fields allow you to add a default value, these are marked with the icon under Selected Fields; click on this icon to open an interface to edit the default value for the field. Fields with a configured default value will be marked with the icon. It is also possible to upload a file without including fields with default values the fields you wish to remove must be provided at the end of the template and have a default value.

Selected Fields			Available Fields		
Name	Max Length	Required	Name	Max Length	Required
0 of 13 Required Fields Selected 0.00%			Filler	N/A	Optional
			Receiver Contact Name	40	Required
			Receiver Company Name	35	Conditional
			Receiver Address Line 1	35	Required
			Receiver Address Line 2	35	Optional
			Receiver Address Line 3	35	Optional
			Receiver Town	20	Required
			Receiver Postal Code	60	Optional

Complete the following steps to create the new template:

1. Enter a template name. This is a required field.
2. Specify the format of the file you will be uploading. Intelligent Shipper supports CSV (Comma Separated), PIPE Separated and ASCII fixed length file formats.
3. Select the required template type, Domestic or International. The International template has some additional required fields that are needed for customs purposes.
NOTE: If you want to upload a file containing both domestic and international shipments then use the International template. All required fields will need to be populated for both domestic and international shipments.
4. Select the required weight unit: KG(Kilos) or G(Grams).
5. Select the required unit of length: CM(Centimetres) or MM(Millimetres).

6. Select whether to share the template with other team members. If this box is ticked then the template will be available to all users for your customer account, if the box is unticked the template will only be available to yourself.
7. Add fields to the template by clicking on the field in the Available Fields list. As fields are added to the template, they will be removed from the Available Fields list and added to the Selected Fields list.
 - As fields are added to the template, they will be removed from the Available Fields list and added to the Selected Fields list.
 - All Required fields must be selected. A progress bar indicates if all required fields have been selected. This bar must be at 100% before a template can be saved.
 - If a Conditional field is selected, then it may require other fields to be added to the template. E.g. Item Description requires Item Value and Weight. In this case, if the relevant conditional fields are not selected then an error message will be displayed.
 - Optional fields are truly optional, if they are not select there is no impact to template functionality
 - Fillers can be used for any fields that will be given in the upload file but are not in the available field list. For e.g. "upload date" is not available in the available field list but if it will be used in the upload file then a "Filler" field can be used. The filler can also be used to pass blank values, so that you do not need to manually edit your upload file before uploading it.
 - The order of the upload file must match the order of the template that has been saved i.e. if the shipper's reference is in the first column in the template then the same must be given as the first column in the upload file.
8. Once all the necessary fields have been added to the Selected Fields list, click the 'Save' button to save the Bulk Mailing Template.

Add Default Values to Fields

Selected Fields		10 of 13 Required Fields Selected		76.92%
Name	Max Length	Required		
9 Receiver Country Code	2	Optional		
10 Receiver Telephone	20	Required		
11 Receiver Email Address	254	Required		
12 Safe Place	30	Optional		
13 Shipper's reference	20	Required		
14 Shipment Date (DD/MM/YYYY)	10	Optional		
15 Customer Department Code	17	Optional		
16 Shipment Service	4	Required		
17 Service Level	2	Optional		
18 Shipment Weight	7	Required		
19 Shipment Type	3	Required		

For fields where a default value can be set, an Edit icon is displayed in the Selected Fields list as shown in the image above. To add a default value to a field, complete the following steps:

1. Click the Edit icon and a window will open as shown in the image below.



The image shows a dialog box with the title "Default Receiver Country Code". Inside the dialog, there is a label "Default Value:" followed by a text input field. Below the input field are two buttons: "Apply" and "Close".

2. Enter the default value required for the field and click Apply.
3. The window will close and the default value will be saved.
4. Repeat steps 1-3 for all fields you want to set a default value for.

Using Default Values in Bulk Mailing Files

When preparing a Bulk Mailing file for upload, if a field has a default value set then this can be left blank in the upload file, even if it is a required field. The column header must still be included in the file, else an error will be generated when you try and upload the file.

When the Bulk Mailing file is uploaded, if a field that has been left blank in the template has a default value set then the shipment record will be populated with this default value.

NOTE: If a required field does not have a default value set and is left blank in the Bulk Mailing file, then an error will be generated when the file is uploaded.

8 Appendix 3 – Frequently Asked Questions (FAQs)

The table below contains responses to some questions that users frequently ask relating to the Bulk Mailing functionality.

No	Question	Answer
1	What if customer is shipping domestic and international destinations?	You should create two templates; one for domestic and one for international. If you cannot split the data, you must create an international template and include both domestic and international shipments in it. Be aware that if you choose this option you must provide item information for domestic shipments, as it is required in International template.
2	What if I am using Royal Mail Tracked Services but customer does not get SMS or Email notification? / What if I want to use SMS or Email notifications with Royal Mail Tracked Services?	You must add a column in your file with the correct enhancement code and map the template file with the correct phone number/ Email address. Please see enhancements codes in the Appendix 4 section.
3	What if I am shipping multiple items in an order and getting an error message similar to “Value of Goods cannot be less than Item Value” and “Total Weight cannot be less than Item Net weight”?	Total weight must be equal to the sum of the item weight of all items in the order, or greater than the sum of the item weight; if you are also including packaging weight in the total weight. You must provide these calculated totals in one of the rows in the upload file that belong to that shipment.

9 Appendix 4 – Enhancement Group and Description

The table below lists the Royal Mail enhancement codes that can be used in the Service Enhancement Code fields in the bulk mailing template.

Code	Description	Enhancement Group	Comments
1	Consequential Loss £1000	Consequential Loss Insurance	A maximum of 4 enhancements are allowed by Royal Mail.
2	Consequential Loss £2500	Consequential Loss Insurance	
3	Consequential Loss £5000	Consequential Loss Insurance	
4	Consequential Loss £7500	Consequential Loss Insurance	
5	Consequential Loss £10000	Consequential Loss Insurance	
6	Recorded	Recorded Signed for Mail	There cannot be more than 1 enhancement from each Enhancement Group.
11	Consequential Loss £750	Consequential Loss Insurance	
13	SMS Notification	Tracking Notifications	
14	E-Mail Notification	Tracking Notifications	
16	SMS & E-Mail Notification	Tracking Notifications	
22	Local Collect	Local Collect	
24	Saturday Guaranteed	Saturday Guaranteed	

10 Appendix 5 – List of Common Errors and Resolution

1. Bulk Mailing file stuck in “Processing” state

When a bulk mailing file appears to become stuck in the ‘Processing’ state for a longer duration of time, it is most likely due to international shipments being created within a domestic type Bulk Mailing Template (or vice versa). An example of the screenshot is given below.

Date Created	Name	Upload Type	Status	Shipments	File Name	Label Status
02 Nov 2018 10:34		Bulk Mailing	Processing			

If this occurs, please contact techsupport@intersoft.co.uk for assistance.

2. Error Message - “Your file has some errors. You can download errors and abort uploading or continue processing successful record”

The following message occurs when you have errors in the file.

The screenshot shows the 'Upload New Data File' interface. At the top, there is a breadcrumb trail: Dashboard / Bulk Mailing / Upload New Data File. A yellow error message box states: "Your file has some errors. You can download errors and abort uploading or continue processing successful record." Below the message are two buttons: "Download errors" and "Continue processing successful records". The form includes fields for Project Name, File (with a Browse... button), Email Address, and a checkbox for "Has header row?" which is currently unchecked. Below these are dropdown menus for Upload Template (Default Domestic Template) and Upload Type (Bulk Mailing). At the bottom is an "Upload File" button.

This is due to the option “Has the header row” has not been ticked while uploading the bulk mailing file and your file contains a header row. An example of the header row is given below.

Receiver Contact Name
Example Contact

To resolve this error, please ensure that this setting is enabled before attempting to process a bulk mailing file.

3. Error Message – “The upload file does not match the bulk mailing template selected”

The following error in the screenshot can occur for numerous reasons, a possible scenario is Your bulk mailing upload file doesn’t match the column headers and layout compared to your upload template that was setup initially.

Upload New Data File

Dashboard / Bulk Mailing / Upload New Data File ← Back

The uploaded file does not match the bulk mailing template selected.

Project Name

File *

Email Address

Has header row? This will be ignored for ASCII upload files

Upload Template

Upload Type

In this case check your bulk mailing template and see if the upload file matches the setup template.

There are also other common errors when

- You are attempting to upload a bulk mailing file which is not an acceptable format (E.g. Common mistake is to upload an Excel workbook .xls file rather than an acceptable CSV format file)
- The file you are attempting to upload is in an acceptable format (CSV/PIPE separated/ ASCII fixed length)

You can find the bulk mailing template under Shipment Processing->Bulk Mailing->Click on View Templates. Alternatively, you can also view this under Maintenance-> Bulk Mailing Template. An example screenshot is given below. Click on “Example (CSV)” to generate an example of your desired upload template.

Bulk Mailing

Dashboard / Shipment Processing / Bulk Mailing ← Back

Search...

42 Uploads

Date Created	Name	Upload Type	Status	Shipments	File Name	Label Status
25 Jan 2019 10:07	Faris Customer Test-25/01/2019 10:07:30	Bulk Mailing	Uploaded	1	DomesticexampleFile (1).csv	<input type="button" value="Process"/>

Default Domestic Template	dc93122a-b2ff-4872-986f-084622bc365e	Domestic	System	09/11/2017	--/--/----	25/01/2019	<input checked="" type="checkbox"/>	Example (CSV)
Default International Template	a3bdf54c-04b1-48a5-86f9-6945d741ea66	International	System	09/11/2017	--/--/----	20/12/2018	<input checked="" type="checkbox"/>	Example (CSV)

Note: It is advisable to paste your shipment data into an example template CSV file in order to ensure no errors occur due to template mismatches.

4. Error Message – “The service is not a valid service for these shipment contents to this destination”

To resolve this error, please check the following.

- The service/service code used in the upload file is available for the destination country.
- The value of goods is within the acceptable limit for the service requested.
- The package dimensions are within the acceptable limit for the service requested.

11 Appendix 6 – Creating Multiple Items Within a Single Shipment

To create multiple items within a single shipment, ensure that the items listed in your bulk mailing file have the same “Shipper's reference”

Shipper's reference	Receiver Contact Name	Receiver Address Line 1	Receiver Address Line 2	Receiver Town	Receiver Post/Zip Code	Receiver Telephone	Receiver Email Address	Shipment Weight	Shipment Type	Number Of Pieces	Shipment Service	Description of Goods	Value of Goods	Safe
MyRef1	Example Contact	62 High St	Address 2	Staines	TW18 4DY	1935654865	example.contact@example.com	15	NDX	1	CRL1	Mobile Assets	500	
MyRef1	Example Contact	62 High St	Address 2	Staines	TW18 4DY	1935654865	example.contact@example.com	15	NDX	1	CRL1	Mobile Assets	500	

The created shipment can be viewed in the “Shipment Items” section of Intelligent Shipper. You can see from below that multiple items are created in a single shipment reference.

Shipment Reference MyRef1 Cancel Shipment

Agent RMG - Royal Mail

Service CRL1 - Royal Mail 24

Tracking Number [280069786999800048448](#)
[Download Label](#)

Created Created by Faris Customer Test on 25 Jan 2019 10:37

Contact Name Faris Customer Test

Contact Phone 0178455266332

Contact Email faris.intersoft@outlook.com

Company Name Intersoft 1

Address Blays House
Englefield Green
Wick Road
Egham Surrey TW4 5EZ
UNITED KINGDOM

Contact Name Example Contact

Contact Phone 1935654865

Contact Email example.contact@example.com

Company Name

Address 62 High St
Address 2
Staines TW18 4DY
UNITED KINGDOM

Shipment Details

Number of Packages 1

Package Id: 1 120.00cm X 120.00cm X 120.00cm (LxWxH)
Quantity: 1
Total Package Weight: 15.000

Total Shipment Weight 15.000 kg

Contents Type Non-Documents

Value of Customs £20,000.00

Shipment Items

SAMSUNG S4 Package Id : 1
Quantity: 1
Value: £100.00
Weight: 0.600 kg

SAMSUNG S4 Package Id : 1
Quantity: 1
Value: £100.00
Weight: 0.600 kg

Tracking Activity

There is currently no tracking activity information available as of 25 Jan 2019 10:47:07.