

Intelligent Shipper

Cancel Shipments Manual Version 3.0

Document Owner	INTERSOFT Systems and Programming Limited
Version	3.0
Date	25/03/2019
Description	Instructs Customers on how to cancel shipments before close out
Author	Deepa Sankaran

Commercial and in Confidence

The information contained in this document is confidential. No part of this document may be reproduced, disclosed to any third party, or issued in any form or by any means without the express written permission of Intersoft Systems & Programming Ltd.

1 Document Controls

Version History

Version	Amendments	Date	Author
2.0	Existing manual updated to new document format	11/01/2019	Laura Lyonette
2.1	New user guide for cancel shipments before close out	15/03/2019	Deepa Sankaran
2.2	Addition of cancelling and recalling shipments through view shipments screen	21/03/2019	Deepa Sankaran
2.3	Review Comments Update	22/03/2019	Deepa Sankaran
2.4	Review Comments Update	25/03/2019	Deepa Sankaran
3.0	Reviewed and updated to version 3.0 for release	25/03/2019	Deepa Sankaran

Review

Name	Title	Date Reviewed	Version Reviewed
Steve Sneath	Retail Solutions Consultant	21/03/2019	2.2
Beata Brewer	Customer Service Manager	25/03/2019	2.3
Lalitha Musnuri	Senior Test Analyst	22/03/2019	2.2

Referenced Documents

Document Name	Version	Location (e.g. Link to Shared Drive, SharePoint etc.)
N/A	N/A	N/A

Contents

1 Document Controls	2
2 Table of Figures.....	4
3 Introduction.....	5
4 Cancel Single or Multiple Shipments	5
4.1 Cancel Shipment via View Shipment Screen.....	7
5 View Cancelled Shipments	10
6 Recall Shipments.....	12
6.1 Recall Shipments via View Shipment Screen	14
7 Appendix 1 – Glossary	15

2 Table of Figures

Figure 1: View Shipments in Shipment Processing Screen	5
Figure 2: Cancel Shipments in View Shipments Screen	6
Figure 3: Select Reason for Cancellation in View Shipments Screen	6
Figure 4: Confirmation of Cancellation	7
Figure 5:View Shipments in Shipment Processing Screen	8
Figure 6: Cancel Button in the View Shipment Screen	8
Figure 7: Confirmation Required for Cancellation	9
Figure 8: Shipment Cancelled Confirmation Screen	9
Figure 9: View Shipments in Shipment Processing Screen	10
Figure 10: To View Cancelled Shipments in Shipment Processing Screen.....	10
Figure 11: List of Cancelled Shipments in the View Shipment Screen.....	11
Figure 12: Close Cancelled Shipments in View Shipments Screen	11
Figure 13: To View Cancelled Shipments in View Shipments Screen	12
Figure 14: Select Shipments to Recall in View Shipments – Cancelled Screen.....	12
Figure 15: Confirmation Required to Recall the Shipment.....	13
Figure 16: Recalled Shipment in View Shipment Screen	13
Figure 17: Recall Cancelled Shipment via View Shipment Screen	14
Figure 18: Successful Recall of a Cancelled Shipment Message	14

3 Introduction

Intelligent Shipper allows shipments to be cancelled up until the point of close out or scheduled close out via clean sweep functionality. Once a shipment has been closed and manifested it can no longer be cancelled. Shipments that have been cancelled can be reinstated within the first 24 hours of cancellation.

This manual instructs Customer users how to cancel shipments via GUI that have not been closed out.

4 Cancel Single or Multiple Shipments

1. To cancel a shipment, use the GUI to login and view the shipments via the shipment processing screen.
2. Cancellation of shipments can be done both on processed and unprocessed shipments before close out. For Royal Mail shipments, if the system is pre-configured with clean sweep then it must be cancelled before the automatic close out time.
3. Click "View Shipments" of a carrier in the shipment processing screen.

The screenshot displays the 'Shipment Processing' dashboard. On the left is a navigation menu with categories: DASHBOARD, SHIPMENT SEARCH, SHIPMENT PROCESSING (highlighted), TRACKING, REPORTING, MAINTENANCE, and QUOTATION. The main content area shows a summary of 'Processed Shipments (125)' and 'Unprocessed Shipments (37)'. Below this, there are sections for different carriers: DHL (Express), Royal Mail, and DPD Netherlands. Each carrier section displays 'Shipment Count' and 'Total Weight' along with a 'View Shipments' link. The 'View Shipments' link for the first DHL (Express) entry is highlighted with a yellow box.

Carrier	Shipment Count	Total Weight
DHL (Express)	2	14.200 KG
Royal Mail	13	13.900 KG
DPD Netherlands	2	0.400 KG
DHL (Express)	3	11.200 KG

Figure 1: View Shipments in Shipment Processing Screen

4. A list of shipments related to the carrier will be displayed.
5. Click the “tick box” of the required shipment to be cancelled. Multiple shipments can also be selected to be cancelled at the same time. You can also cancel all the shipments by clicking the tick box next to “last modified” menu.
6. Click “Cancel Shipments” button to proceed with selected shipments to be cancelled.

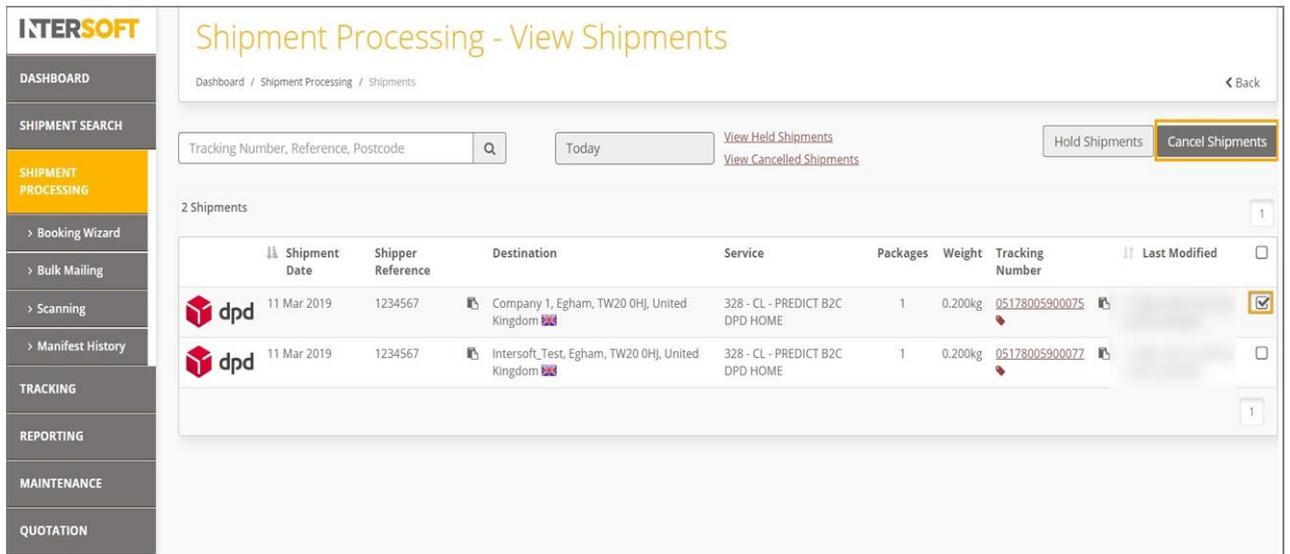


Figure 2: Cancel Shipments in View Shipments Screen

7. A message will be displayed asking for a cancel reason to be selected.
8. Select a reason for cancellation from the drop-down menu. Please note that these messages are pre-configured in the system and you should select one reason from the list.

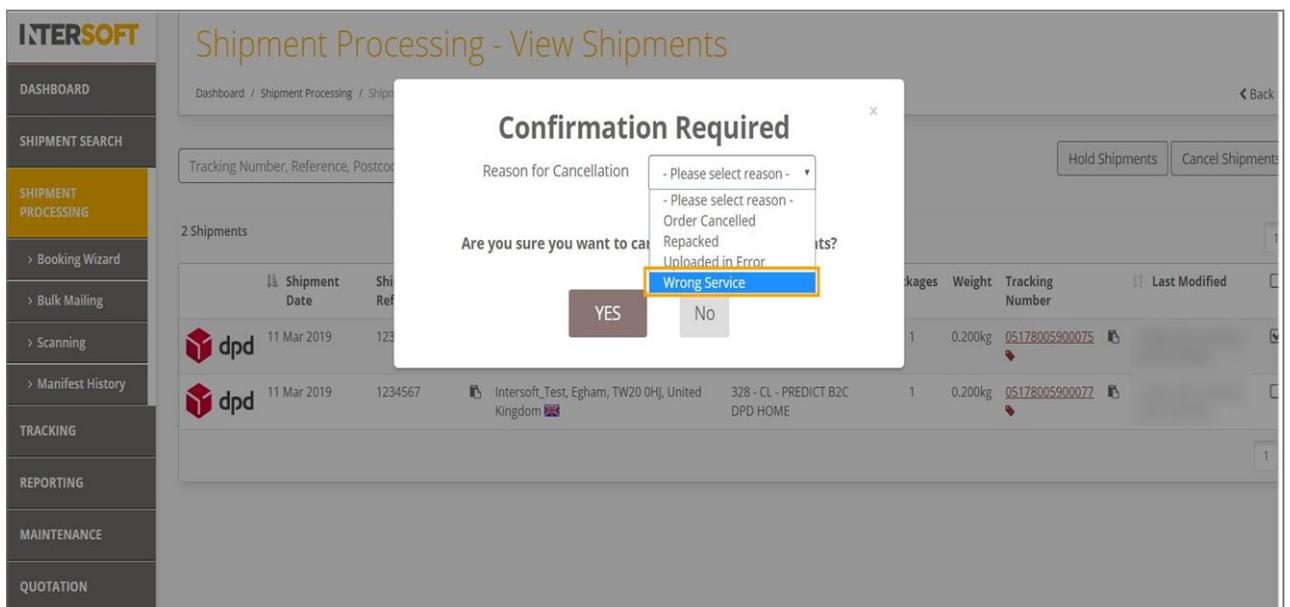


Figure 3: Select Reason for Cancellation in View Shipments Screen

9. Click “Yes” to cancel the shipment. If you click “No” the “Confirmation Required” message will be dismissed, and shipments will not be cancelled.
10. The shipments that are cancelled will no longer appear in the view shipments list and will not be included in the close out or in the automatic clean sweep.

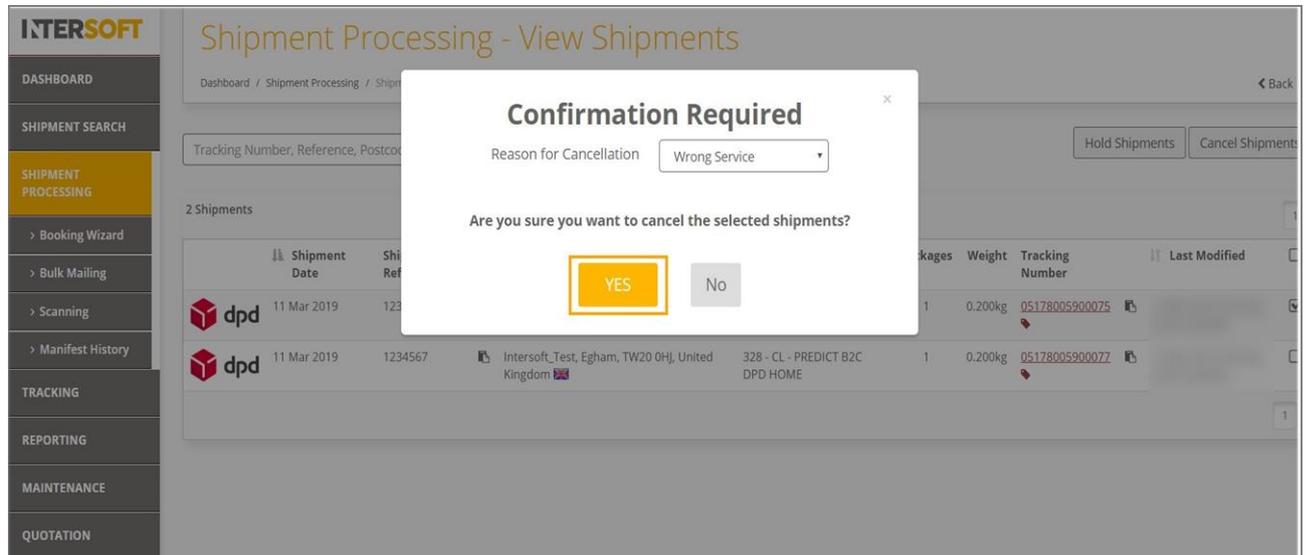


Figure 4: Confirmation of Cancellation

4.1 Cancel Shipment via View Shipment Screen

You can also cancel a shipment via the View Shipment screen. The View Shipment screen can be accessed via any of the following screens:

- Shipment Processing > View Processed Shipments
- Shipment Processing > View Unprocessed Shipments
- Shipment Processing > Shipment Scanning
- Shipment Search

1. To cancel a shipment through the view shipment screen, you must first view the shipment. Click on the required shipment as shown below.

Shipment Processing - View Shipments

Dashboard / Shipment Processing / Shipments ← Back

Tracking Number, Reference, Postcode [View Held Shipments](#) [View Cancelled Shipments](#)

75 Shipments 1 2 3 4

Shipment Date	Shipper Reference	Destination	Service	Packages	Weight	Tracking Number	Last Modified
14 Mar 2019	DB070820180927	McDonough Homeoffice, Charleston, 29401, United States of America	DHL - DHL Express Worldwide WPX	1	1.000kg	8358518210	14 Mar 2019 15:23 by Test Customer
14 Mar 2019	DHLAdomGB2GB / Depart01-Invoice	Express-Shipments Service, London Ag 11 (E), United Kingdom	DHL - DHL Domestic Express	1	4.000kg	8319505880	14 Mar 2019 15:23 by Test Customer
14 Mar 2019	MaxitemDescription	My Company Name, Egham, TW20 0HJ, United Kingdom	DHL - DHL Domestic Express	9	18.000kg	8319506775	14 Mar 2019 15:23 by Test Customer
14 Mar 2019	DB070820180927	McDonough Homeoffice, Charleston, 29401, United States of America	DHL - DHL Express Worldwide WPX	1	1.000kg	6853379466	14 Mar 2019 15:23 by Test Customer
14 Mar 2019	DB070820180927	McDonough Homeoffice, Charleston, 29401, United States of America	DHL - DHL Express Worldwide WPX	1	1.000kg	6853379481	14 Mar 2019 15:23 by Test Customer
14 Mar 2019	DB070820180927	McDonough Homeoffice, Charleston, 29401, United States of America	DHL - DHL Express Worldwide WPX	1	1.000kg	6853379492	14 Mar 2019 15:23 by Test Customer

Figure 5: View Shipments in Shipment Processing Screen

- A detailed view of the shipment information will be displayed with a cancel button. Click “Cancel” to cancel the shipment.

Shipment Information

Intersoft_Test
Blays House
Englefield Green
Wick Road
Egham Surrey TW20 0HJ
UNITED KINGDOM
laura.lyonette@intersoft.co.uk
01784777170

Tracking Number: 8457018430

UNI: JJ01100000003986412

Reference: 1234567

Shipping Date: 19 Mar 2019

Expected Delivery Date: 22 Mar 2019

Agent: DHL (Express)

Service: DHL - DHL Domestic Express

Status: Client Unprocessed - Scanned

Package Information NDX Items: 3 Packages: 2 Value: £75.00 (GBP) Weight: 2.500 KG

Pricing Information Zone: 1

Figure 6: Cancel Button in the View Shipment Screen

- A confirmation required message will be displayed . Select a reason to cancel and click “Yes”.

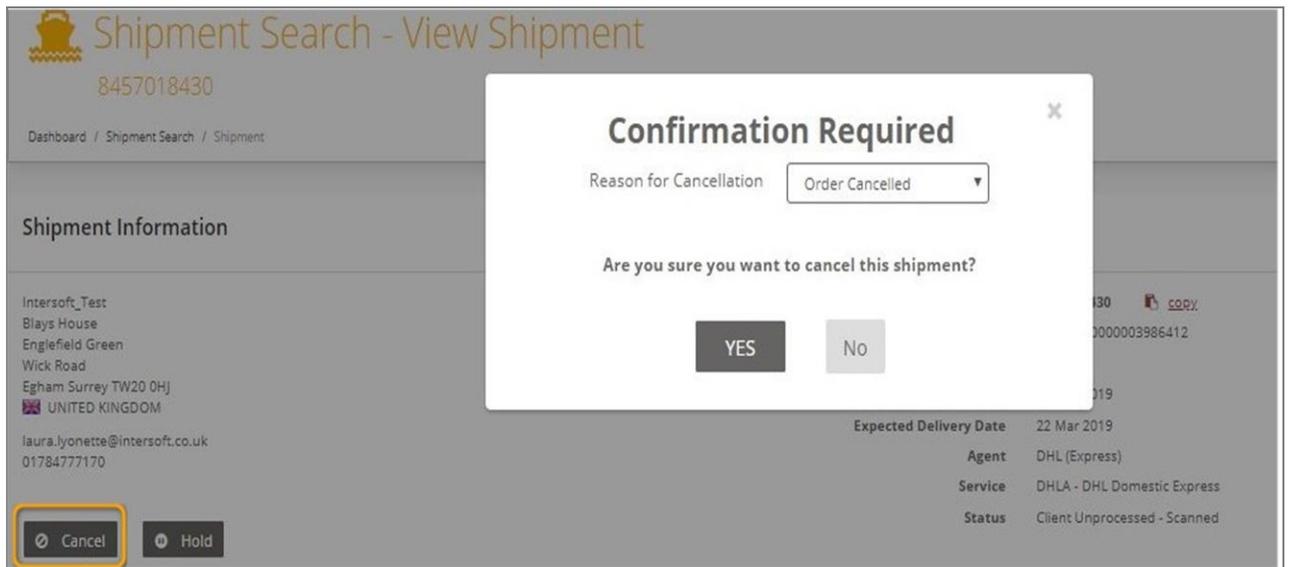


Figure 7: Confirmation Required for Cancellation

4. A “Cancelled” flag will be displayed next to the shipment information header with “Reason for Cancel” and a “Cancelled” watermark will be displayed on the screen. In addition to this, a confirmation message will also be displayed in the top right corner of the screen and the text of the cancel button will be changed to “Recall”.

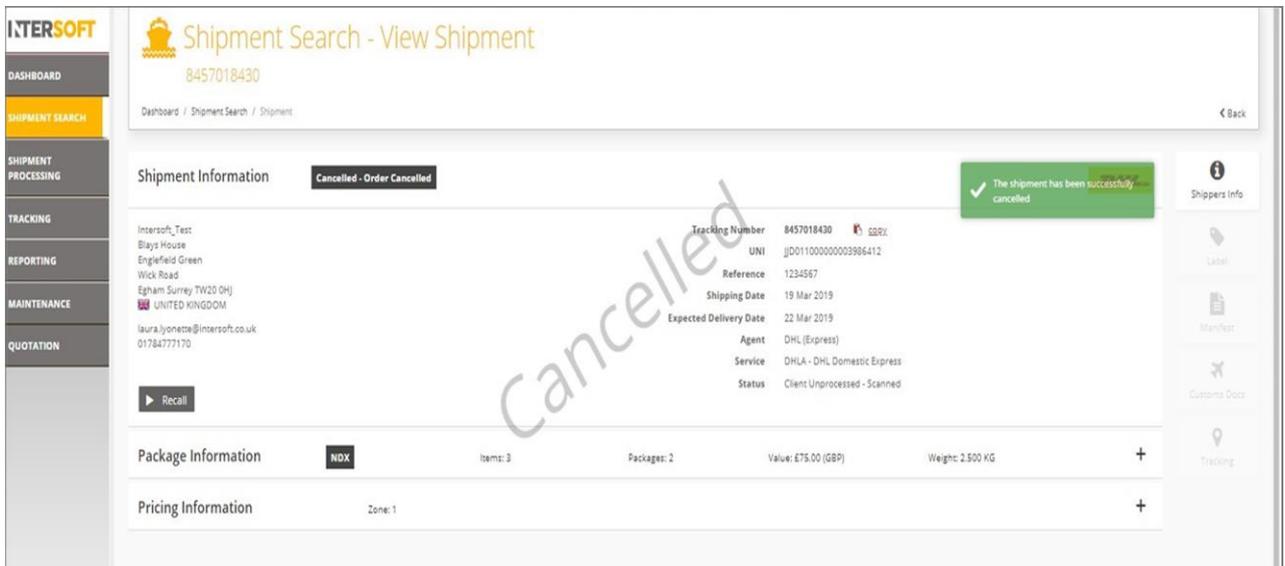


Figure 8: Shipment Cancelled Confirmation Screen

5 View Cancelled Shipments

This section will explain how to view the cancelled shipments.

1. To view the cancelled shipments, you must first navigate to the shipment processing screen.
2. Click “View Shipments” link

Figure 9: View Shipments in Shipment Processing Screen

3. A list of shipments for the selected carrier will be displayed in the screen.
4. Click “View Cancelled Shipments” link

Shipment Date	Shipper Reference	Destination	Service	Packages	Weight	Tracking Number	Last Modified
11 Mar 2019	1234567	Intersoft_Test, Egham, TW20 0HJ, United Kingdom	328 - CL - PREDICT B2C DPD HOME	1	0.200kg	05178005900077	

Figure 10: To View Cancelled Shipments in Shipment Processing Screen

- You can now view the list of cancelled shipments for all carriers being displayed in the screen. Please note that you can only view the shipments that are cancelled on the day.

Shipment Date	Shipper Reference	Destination	Service	Packages	Weight	Tracking Number	Last Modified
14 Feb 2019	Hermes SMS notific (Cancelled - Uploaded in Error)	Quindlan, (LONDON) (CAFE 874), United Kingdom	HESS - Hermes Standard Signature	1	0.600kg	8835187313873584	
14 Feb 2019	DB0112171321GB (Cancelled - Uploaded in Error)	Edgware Road Service, London, E9 2H 4HR, United Kingdom	HEND - Hermes Next Day UK Domestic	1	0.300kg	6835187313873887	
19 Feb 2019	Hermes SMS notif OFF (Cancelled - Uploaded in Error)	Quindlan, (LONDON) (CAFE 874), United Kingdom	HENS - Hermes Next Day Signature	1	0.600kg	6835187313874488	
19 Feb 2019	Hermes SMS notif LN (Cancelled - Uploaded in Error)	Edgware Road Service, London, E9 2H 4HR, United Kingdom	HEND - Hermes Next Day UK Domestic	1	0.200kg	3928490313873480	

Figure 11: List of Cancelled Shipments in the View Shipment Screen

- Click “Close Cancelled Shipments” link if you need to exit the screen. This will return to the previous screen i.e. View Shipments Screen.

Shipment Date	Shipper Reference	Destination	Service	Packages	Weight	Tracking Number	Last Modified
19 Feb 2019	Hermes SMS notif OFF (Cancelled - Uploaded in Error)	Quindlan, (LONDON) (CAFE 874), United Kingdom	HENS - Hermes Next Day Signature	1	0.600kg	6835187313874488	
19 Feb 2019	Hermes SMS notif LN (Cancelled - Uploaded in Error)	Edgware Road Service, London, E9 2H 4HR, United Kingdom	HEND - Hermes Next Day UK Domestic	1	0.200kg	3928490313873480	
27 Feb 2019	0/25/1234 (Cancelled - Repacked)	Mr John Powell, Royal Docks, London, E16 1JH, United Kingdom	FED2 - FedEx International Economy	1	3.250kg	794663400370	
14 Mar 2019	DHLAdomGB2GB / Depart01-Invoice (Cancelled - Order Cancelled)	Edgware Road Service, London, E9 2H 4HR, United Kingdom	DHLA - DHL Domestic Express	1	4.000kg	8319505880	
22 Mar 2019	VW-SR-12 (Cancelled - Repacked)	The Company, Highgate, London, N5 2UR, United Kingdom	DHLC - DHL Domestic Express 12PM	2	1.350kg	8088767352	

Figure 12: Close Cancelled Shipments in View Shipments Screen

6 Recall Shipments

The shipments that have been cancelled can be reinstated or recalled within the first 24 hours of cancellation. Recalling the shipment will reinstate the original shipment.

1. To recall shipments, you must first view the shipments as described in [section 5](#).
2. Click “View Cancelled Shipments” link.

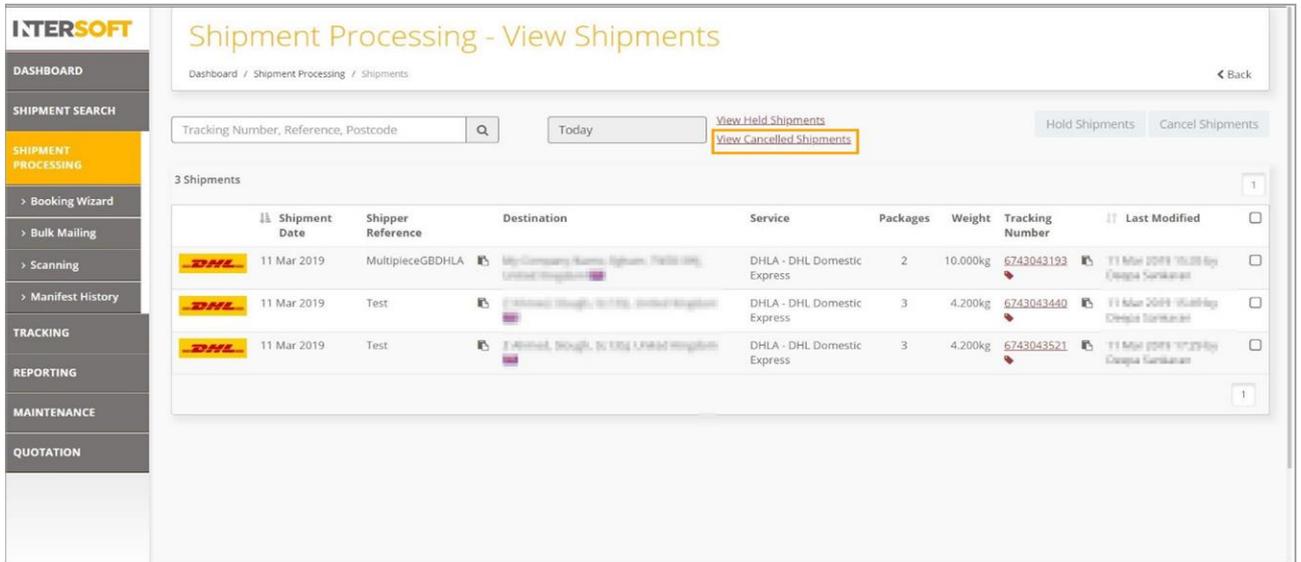


Figure 13: To View Cancelled Shipments in View Shipments Screen

3. Choose the shipment you want to be recalled by clicking the “tick box” next to the shipment.
4. You can also choose multiple shipments by checking the multiple tick boxes.

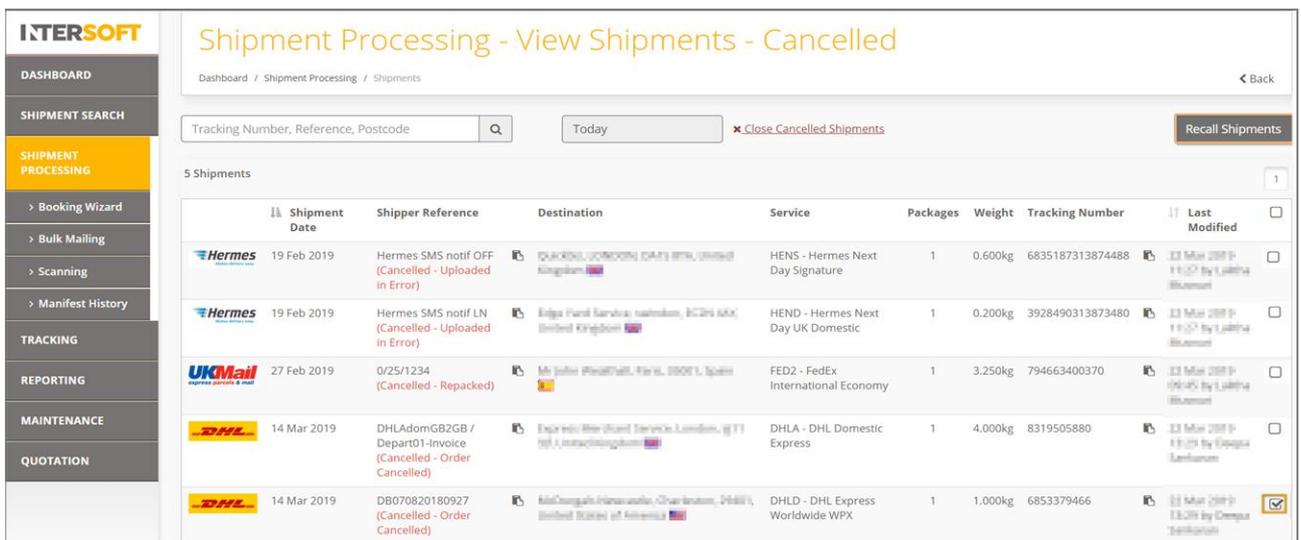


Figure 14: Select Shipments to Recall in View Shipments – Cancelled Screen

5. A message will be displayed asking for confirmation you want to proceed with recalling the shipments.
6. Click “Yes” to recall the selected shipments. If you click “No” the confirmation message will be dismissed and the shipments will not be recalled.

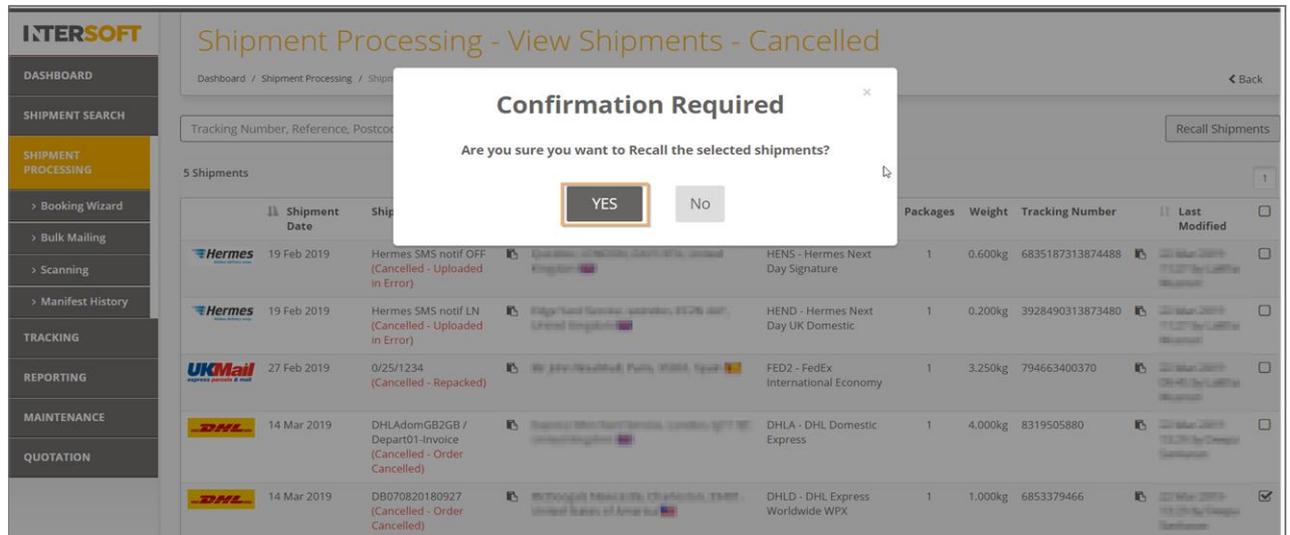


Figure 15: Confirmation Required to Recall the Shipment

7. You can now view the recalled shipment in the view shipment list. The recalled shipment will be reinstated in the state it was previously in (processed or unprocessed), so that it can be processed if needed and closed out ready for shipping. The “Shipment Date” of the recalled shipment will now be updated to the date of recall.

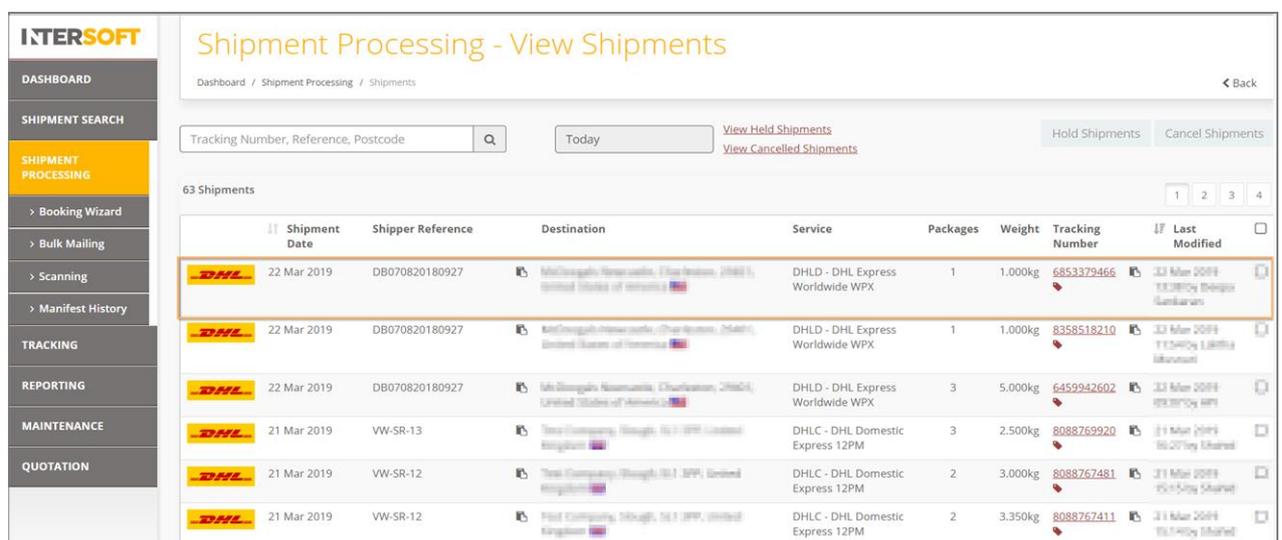


Figure 16: Recalled Shipment in View Shipment Screen

6.1 Recall Shipments via View Shipment Screen

Shipments can also be recalled via the view shipment screen. To view the shipments, follow the steps mentioned in [Section 5](#).

1. To recall a cancelled shipment, select the “Recall” button in the View Shipment screen. A confirmation window will then be displayed.
2. Select the “Yes” button. If the “No” button is selected, the window will be closed, and the shipment will not be recalled.

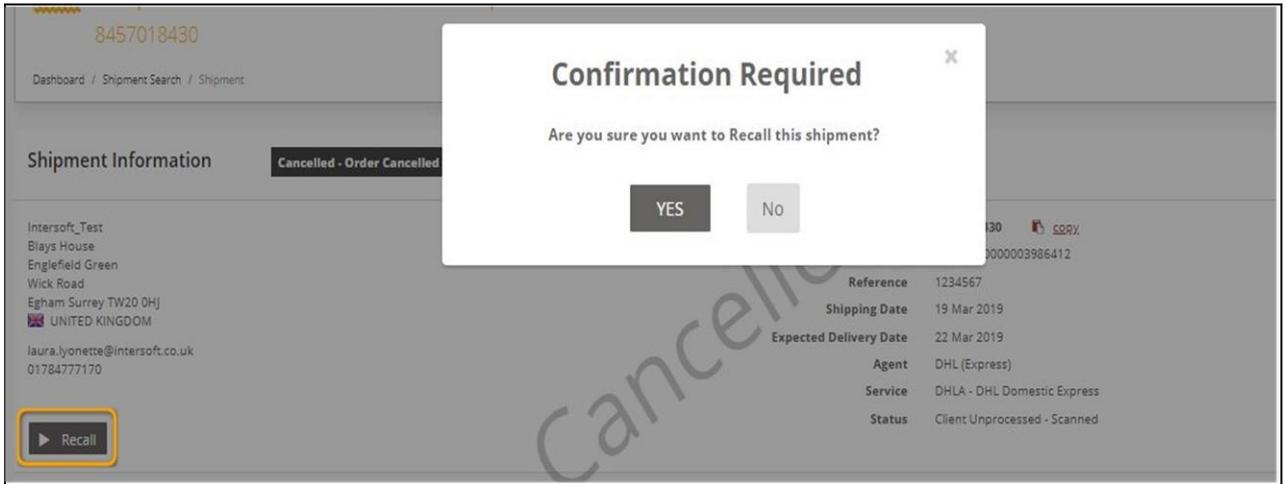


Figure 17: Recall Cancelled Shipment via View Shipment Screen

3. The shipment will now be released, and a confirmation message will be displayed in the top right corner of the screen.
4. The text of the “Recall” button will be changed back to “Cancel”. The shipment will now be reinstated and will be included in the shipment close out process so that it can be manifested and shipped.

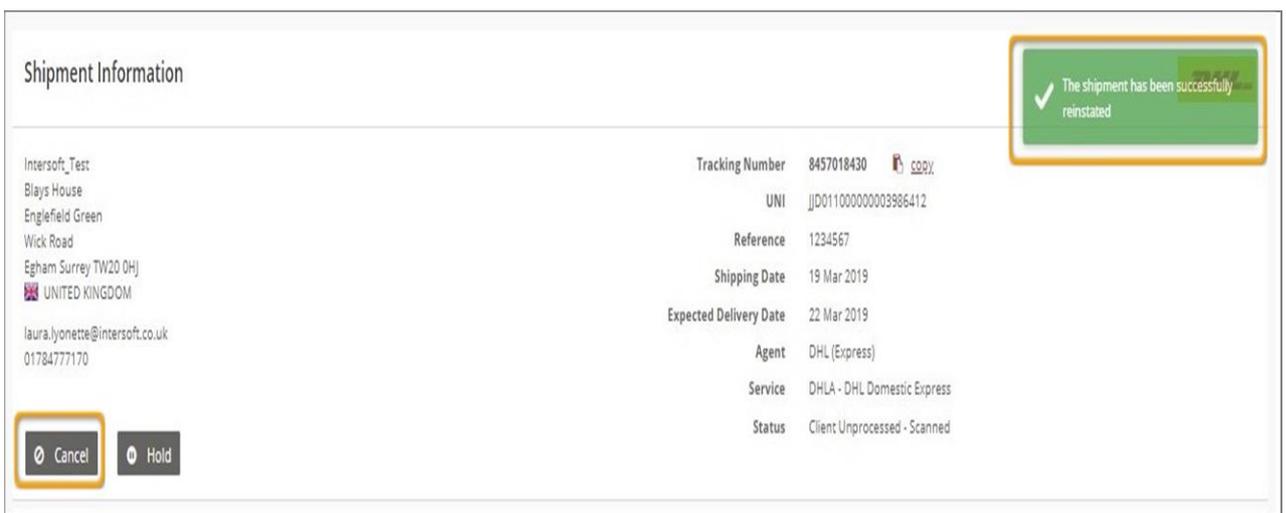


Figure 18: Successful Recall of a Cancelled Shipment Message

7 Appendix 1 – Glossary

Term	Definition
Close Out	Before shipments are handed over to the carrier they must be closed out in the system. This finalises the shipment so that it can no longer be edited and generates the paperwork required by the carrier (e.g. manifest). For more information on closing out shipments see the Manifest & Closeout manual.
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.
Clean Sweep	A process that runs at set days and times configured in the maintenance screens to automatically close out any outstanding shipments for a customer that have not yet been closed. This is only available for Royal Mail shipments only and it does not include other carriers.