

Intelligent Shipper

Customer Onboarding for Royal Mail 3PIs Version 4.0

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|-----------------------|---|
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| Description | Instructs Royal Mail Third Party Integrator (3PI) System Administrators how create and edit customer accounts to onboard new customers onto their system. |
| Author | Laura Price |

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1 Document Controls

Version History

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Review

| Name | Title | Date Reviewed | Version Reviewed |
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3 Introduction

This manual is intended for Royal Mail Third Party Integrators (3PIs) using Intelligent Shipper. It instructs 3PI System Administrators how to create a customer account and add the customer's Royal Mail account details, so that customers can be onboarded onto the system.

4 Create New Customer Account

When you login to Intelligent Shipper, the Customers screen will be displayed. This screen contains a list of all customer accounts in the system and allows new customers to be added.

To create a new customer account, click the "Add Customer" button.

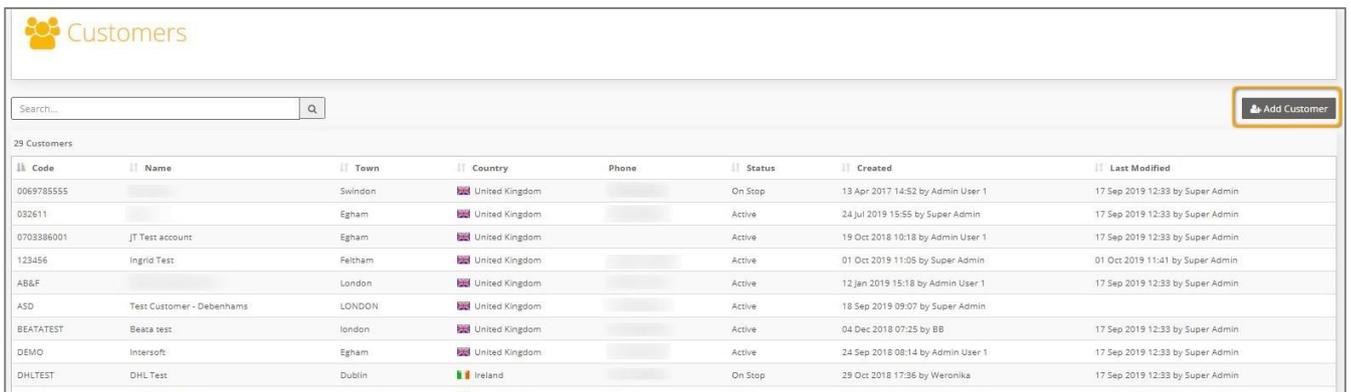


Figure 1: Customers screen, Add Customer button

The Add Customer screen will open and will contain the fields shown in figure 2 below.

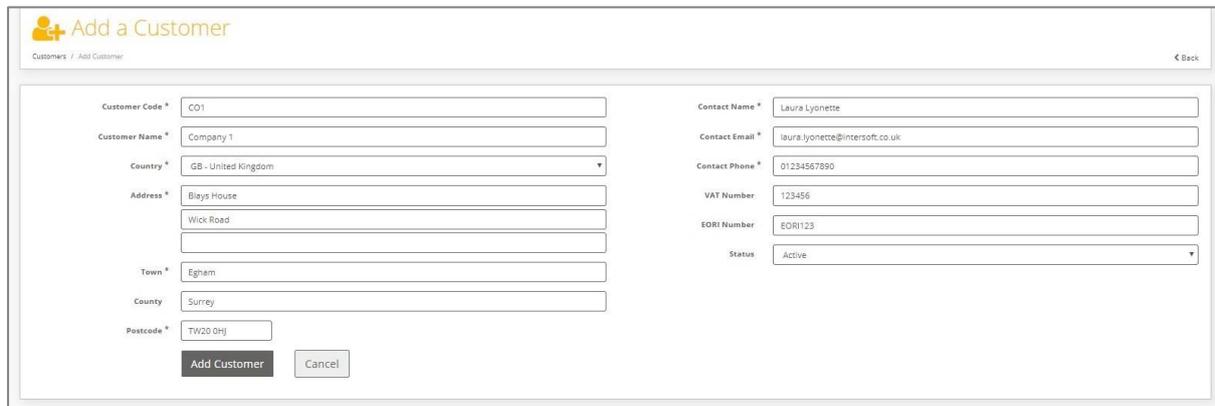


Figure 2: Add Customer screen

Populate the fields with the customer's details. The fields are described in the table below:

| Field Name | Description | Optionality (M/C/O) | Validation Rules |
|---------------|---|---------------------|------------------------------------|
| Customer code | Define a unique identifying code for the customer. This will be displayed in the system alongside customer name | Mandatory | Maximum 10 alphanumeric characters |

| Field Name | Description | Optionality (M/C/O) | Validation Rules |
|---------------|--|---------------------|--|
| | everywhere customer details are displayed. | | |
| Customer Name | The customer's name. | Mandatory | Maximum 35 alphanumeric characters. |
| Country | Select the country the customer is based in from the drop-down list. | Mandatory | Selection from drop-down list. |
| Address | Enter the customer's main shipping address. | Mandatory | Maximum 35 alphanumeric characters per field. |
| Town | Enter the town of the customer's main shipping address. | Mandatory | Maximum 30 alphanumeric characters per field. |
| County | Enter the county of the customer's main shipping address. | Optional | Maximum 50 alphanumeric characters |
| Postcode | Enter the postcode of the customer's main shipping address. | Mandatory | Maximum 10 alphanumeric characters. Must be a valid UK postcode. |
| Contact Name | Enter the contact name of the primary contact at the customer organisation. The primary contact details may be used as the shipper details, if shipper information is not provided when a shipment is created. | Mandatory | Maximum 100 alphanumeric characters |
| Contact Email | Enter the email address of the primary contact at the customer organisation. | Mandatory | Must be in a valid email format e.g. name@customer.co.uk |
| Contact Phone | Enter the phone number of the primary contact at the customer organisation. | Mandatory | Maximum 20 numeric characters |
| VAT Number | Enter the customer's VAT Number known. If entered this will be displayed on customs documents generated for the customer account. If you do not know the VAT number then this can be left blank. | Optional | Maximum 15 alphanumeric characters |
| EORI Number | Enter the customer's EORI (Economic Operations Registration Identification) Number if known. If entered this will be displayed on customs documents generated for the customer account. If you do not know the VAT number then this can be left blank. | Optional | Maximum 15 alphanumeric characters |
| Status | Select the customer's account status from the following drop-down list: <ul style="list-style-type: none"> Active – the customer's account is activated and ready to use. | Optional | Selection from drop-down list. |

| Field Name | Description | Optionality (M/C/O) | Validation Rules |
|------------|--|---------------------|------------------|
| | <p>Users of the customer account can login and create shipments.</p> <ul style="list-style-type: none"> On Stop – the customer’s account is on hold. Users of the customer account will not be able to login to the system. The account can be taken off hold by editing the customer account and selecting a different option from the list. Closed – the customer no longer has a valid contract to use Intelligent Shipper. Users of the customer account will not be able to login to the system. The customer account can be re-activated by editing the customer account and selecting “Active” from the list. | | |

Figure 3: Table of fields in Add Customer screen

Once the screen has been populated with the customer’s details, click the “Add Customer” button to create the customer account.

The customer account will be created and the following additional tabs will be displayed:

- Contacts - add contacts to the customer account
- API Security - for API customers, enter the credentials the customer will use to connect to the API
- Royal Mail Account - add the customer’s Royal Mail account details. This will validate the customer's account details against Royal Mail's OBA billing system and return a list of the Royal Mail services available to the customer.

Figure 4: New customer account added

Select the "Back" link on the customer account to return to the Customers screen. The new customer account will be listed.

| Code | Name | Town | Country | Phone | Status | Created | Last Modified |
|------------|---------------------------|-----------|----------------|---------------|---------|-------------------------------------|----------------------------------|
| 006978555 | | Swindon | United Kingdom | 0799999999 | On Stop | 13 Apr 2017 14:52 by Admin User 1 | 17 Sep 2019 12:33 by Super Admin |
| 032611 | | Egham | United Kingdom | 07488556922 | Active | 24 Jul 2019 15:55 by Super Admin | 17 Sep 2019 12:33 by Super Admin |
| 0702386001 | JT Test account | Egham | United Kingdom | | Active | 19 Oct 2018 10:18 by Admin User 1 | 17 Sep 2019 12:33 by Super Admin |
| 123456 | Ingrid Test | Fetham | United Kingdom | +447477144307 | Active | 01 Oct 2019 11:05 by Super Admin | 01 Oct 2019 11:41 by Super Admin |
| AB&P | | London | United Kingdom | 01784 7771 61 | Active | 12 Jan 2019 15:18 by Admin User 1 | 17 Sep 2019 12:33 by Super Admin |
| ASD | Test Customer - Debenhams | LONDON | United Kingdom | 01784556223 | Active | 18 Sep 2019 09:07 by Super Admin | |
| BEATATEST | Beata test | london | United Kingdom | 01753 687979 | Active | 04 Dec 2018 07:25 by BB | 17 Sep 2019 12:33 by Super Admin |
| COI | Company 1 | Egham | United Kingdom | 01234567890 | Active | 03 Oct 2019 13:45 by Laura Lyonette | |
| DEMO | Intersoft | Egham | United Kingdom | 01753 687979 | Active | 24 Sep 2018 08:14 by Admin User 1 | 17 Sep 2019 12:33 by Super Admin |
| DHLTEST | DHL Test | Dublin | Ireland | 07577448233 | On Stop | 29 Oct 2018 17:36 by Weronika | 17 Sep 2019 12:33 by Super Admin |
| DPDNL | DPD Netherlands | Amsterdam | Netherlands | 07488556922 | Active | 11 Mar 2019 11:06 by Admin User 1 | 17 Sep 2019 12:33 by Super Admin |

Figure 5: New customer account displayed in customers list

To edit the customer details, select that customer row in the list and the Edit Customer screen will open.

4.1.1 Add Contacts to Customer Account

Once the customer account has been created, you can add more contacts to the customer account.

To add contacts to the customer account, select the Contacts tab. This will display the primary contact details that were entered when the customer account was created. To add more contacts to the customer account, click the "Add Contacts" button.

| Name | Email | Phone | Description | Created | Last Modified |
|----------------|--------------------------------|-------------|-----------------|-------------------------------------|---------------|
| Laura Lyonette | laura.lyonette@intersoft.co.uk | 01234567890 | Primary Contact | 03 Oct 2019 12:45 by Laura Lyonette | |

Figure 6: Add Contact button

The screen will update to show contact information fields.

To add a contact to the customer account contact:

1. Enter the contact's name. This is a mandatory field.
2. Enter the contact's phone number – this optional for all non-primary contacts.
3. Enter the contact's email address – this is optional for all non-primary contacts.
4. Enter a description for the contact. This is a mandatory field.
5. Click the "Add Contact" button.

1 Name * John Smith

2 Phone

3 Email

4 Description * Secondary Contact

5 Add Contact Cancel

| Name | Email | Phone | Description | Created | Last Modified |
|----------------|--------------------------------|-------------|-----------------|-------------------------------------|---------------|
| Laura Lyonette | laura.lyonette@intersoft.co.uk | 01784777170 | Primary Contact | 03 Dec 2018 17:42 by Laura Lyonette | |

Figure 7: Add a contact

The contact will be saved and listed in the Contacts tab. To add another contact to the customer account, click "Add Contact" again and enter the contact details.

Add Contact

| Name | Email | Phone | Description | Created | Last Modified |
|----------------|--------------------------------|-------------|-------------------|-------------------------------------|---------------|
| John Smith | | | Secondary Contact | 03 Dec 2018 17:50 by Laura Lyonette | |
| Laura Lyonette | laura.lyonette@intersoft.co.uk | 01784777170 | Primary Contact | 03 Dec 2018 17:42 by Laura Lyonette | |

Figure 8: New contact listed in Contacts tab

The Contacts tab will list all contacts that have been added for the customer account.

4.1.1.1 Changing the Primary Contact

The primary contact can be changed to any contact that has all fields entered. To change the primary contact to a different contact:

1. Ensure the contact you want to set as the primary contact has all fields entered.
2. Select the "Set as Primary Contact" link for the contact

Add Contact

| Name | Email | Phone | Description | Created | Last Modified |
|-----------------|---------------------------------|-------------|-------------------|-------------------------------------|---------------|
| John Smith | | | Secondary Contact | 03 Dec 2018 17:50 by Laura Lyonette | |
| Laura Lyonette | laura.lyonette@intersoft.co.uk | 01784777170 | Primary Contact | 03 Dec 2018 17:42 by Laura Lyonette | |
| Sherlock Holmes | sherlock.holmes@testcontact.com | 01234567890 | Account Manager | 07 Dec 2018 09:41 by Admin User 1 | |

Set as Primary Contact

Figure 9: Set as Primary Contact link

3. That contact will then be set as the primary contact. The "Select Primary Contact" link will be removed from that contact and displayed against all other contacts that have all fields entered, and so could be set as the primary contact.

| Name | Email | Phone | Description | Created | Last Modified |
|-----------------|--|-------------|-------------------|-------------------------------------|--|
| John Smith | | | Secondary Contact | 03 Dec 2018 17:50 by Laura Lyolette | |
| Laura Lyolette | laura.lyolette@intersoft.co.uk | 01784777170 | Primary Contact | 03 Dec 2018 17:42 by Laura Lyolette | Set as Primary Contact |
| Sherlock Holmes | sherlock.holmes@testcontact.com | 01234567890 | Account Manager | 07 Dec 2018 09:41 by Admin User 1 | 07 Dec 2018 09:47 by Admin User 1 |

Figure 10: Primary contact changed

4.1.1.2 Deleting Contacts

Contacts that are not the primary contact can be deleted from the customer account. To delete a contact from the customer account:

1. Select the delete icon for that contact.

| Name | Email | Phone | Description | Created | Last Modified |
|-----------------|--|-------------|-------------------|-------------------------------------|--|
| John Smith | | | Secondary Contact | 03 Dec 2018 17:50 by Laura Lyolette | |
| Laura Lyolette | laura.lyolette@intersoft.co.uk | 01784777170 | Primary Contact | 03 Dec 2018 17:42 by Laura Lyolette | Set as Primary Contact |
| Sherlock Holmes | sherlock.holmes@testcontact.com | 01234567890 | Account Manager | 07 Dec 2018 09:41 by Admin User 1 | 07 Dec 2018 09:47 by Admin User 1 |

Figure 11: Delete contact icon

2. A confirmation message will be displayed prompting you to confirm you want to delete the contact. Select the “Delete” button to continue and delete the contact.

NOTE: Selecting the “Cancel” button will cancel the message without deleting the contact.

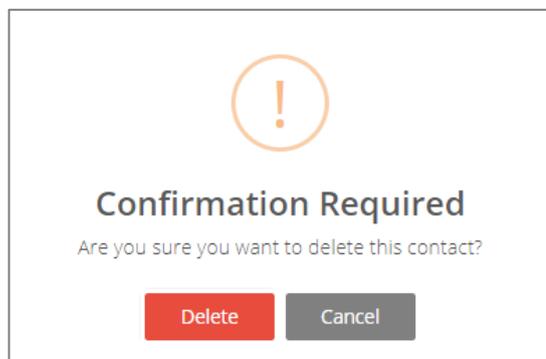


Figure 12: Delete contact confirmation message

3. The contact will then be removed from the contacts list.

| Name | Email | Phone | Description | Created | Last Modified |
|-----------------|--|-------------|-----------------|-------------------------------------|--|
| Laura Lyolette | laura.lyolette@intersoft.co.uk | 01784777170 | Primary Contact | 03 Dec 2018 17:42 by Laura Lyolette | Set as Primary Contact |
| Sherlock Holmes | sherlock.holmes@testcontact.com | 01234567890 | Account Manager | 07 Dec 2018 09:41 by Admin User 1 | 07 Dec 2018 09:47 by Admin User 1 |

Figure 13: Contact deleted

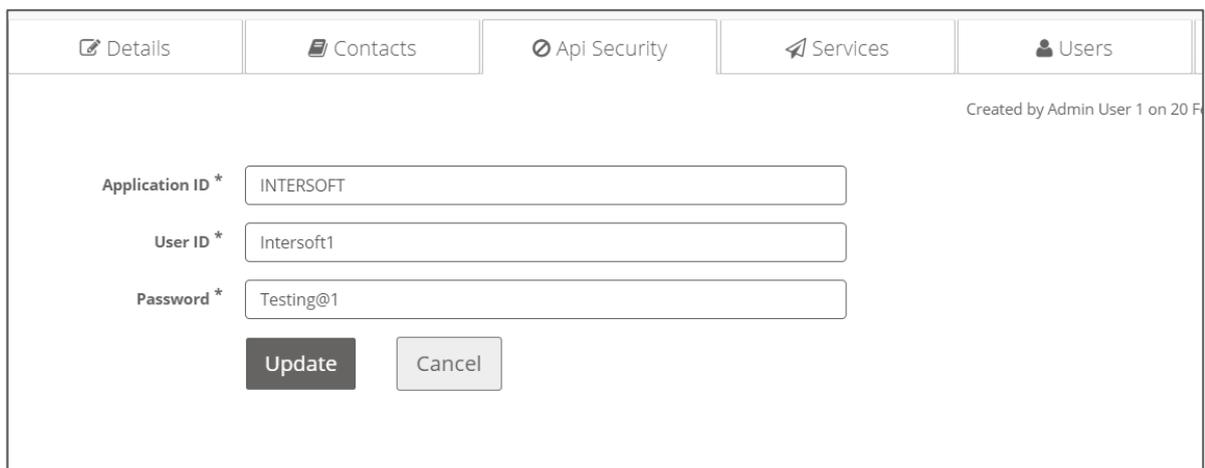
NOTE: It is not possible for the primary contact to be deleted.

4.1.2 Add API Security Details to Customer Account

The credentials the customer will use to access the API need to be added to the customer account.

To add API details to the customer account, select the API Security tab and enter the following information.

1. Define a 10-character application ID. The customer will use this in the 'Application ID' field when sending API requests.
2. Define a 10-character user ID. The customer will use this in the 'User ID' field when sending API requests.
3. Define a 10-character password. The customer will use this in the 'Password' field when sending API requests.
4. Click the Update button. This will save the API details against the customer account, and these details will be used to authenticate the customer account when the customer connects to the API.



The screenshot shows a web application interface with a navigation bar at the top containing five tabs: 'Details', 'Contacts', 'Api Security', 'Services', and 'Users'. The 'Api Security' tab is selected and highlighted. Below the navigation bar, the text 'Created by Admin User 1 on 20 F' is visible. The main form area contains three input fields: 'Application ID *' with the value 'INTERSOFT', 'User ID *' with the value 'Intersoft1', and 'Password *' with the value 'Testing@1'. Below these fields are two buttons: 'Update' (a dark grey button) and 'Cancel' (a light grey button).

Figure 14: Enter API security details

5 Add Royal Mail Account Details to Customer Account

Once the customer account has been created the customer's Royal Mail account details need to be added to their Intelligent Shipper customer account.

NOTE: Email notification updates will be sent during the Royal Mail account onboarding process. These emails will be sent to the email address of the Intelligent Shipper user account that submits the Royal Mail onboarding request. Therefore, before adding the customer's Royal Mail account details, ensure the email address of the account you are logged in under is the email address you want to receive notifications to.

To add Royal Mail account details to a customer account, select the "Royal Mail Account" tab in the Customer screen.

The screenshot shows a web interface for adding a Royal Mail account. At the top, there are navigation tabs: Details, Contacts, Api Security, Services, Users, and Royal Mail Account. Below the tabs is a note: "If you don't want this customer to use the main Royal Mail Account, or your system doesn't have a main Royal Mail Account, add a Royal Mail Account here. This is the one that will then be used for this customer. If there is a main Royal Mail Account it is maintained through the [Royal Mail Label Integration](#)." The form contains the following fields and controls:

- Royal Mail Account Number ***: Text input field containing "0069786001".
- Posting Location ***: Text input field containing "9000257151".
- OBA Access Code ***: Text input field containing "7001". A button labeled "Request OBA Access Code" is to the right.
- Receiving Hub ***: Dropdown menu showing "002598 - Aberdeen Mail Centre (ZEAB)".
- Return Name**: Text input field.
- Return Country**: Dropdown menu showing "-- Select Country --".
- Return Address**: Three stacked text input fields.
- Return Town**: Text input field.
- Return County**: Text input field.
- Return Postcode**: Text input field.

At the bottom of the form is a button labeled "Add Royal Mail Account".

Figure 15: Add customer's Royal Mail account details

To setup the customer's Royal Mail account details:

1. Enter the customer's Royal Mail account number. This must be 10 digits long- if the customer's account number is not 10 digits then add 0s at the front of the account number to increase the length to 10 digits.
2. Enter the posting location number of the customer's main posting location. Additional posting locations can be added once the customer's Royal Mail account details have been setup.
3. The OBA Access Code for the posting location will need to be requested from Royal Mail. To do this, select the "Request OBA Access Code" button. A confirmation window will be displayed prompting you to enter the customer's OBA email address.

4. Enter the email address that was used when the posting location was registered with Royal Mail and click the "Request OBA Access Code" button.

NOTE: If you click the "Cancel" button the confirmation message will be cancelled and the OBA Access Code will not be requested.

Request a new OBA Access code for this Posting Location?

This procedure will overwrite the current Access Code on this Posting Location.

Bookings cannot be made on this Posting Location until the new access code has been received.

Customer OBA Email Address *

Request OBA Access Code Cancel

Figure 16: Request OBA Access Code

5. The OBA Access Code field will be updated with the text "PENDING" and the current date.

Details Contacts Api Security Services Users Royal Mail Account

If you don't want this customer to use the main Royal Mail Account, or your system doesn't have a main Royal Mail Account, add a Royal Mail Account here. This is the one that will then be used for this customer. If there is a main Royal Mail Account it is maintained through the [Royal Mail Label Integration](#).

Royal Mail Account Number *

Every Royal Mail Account has at least one Posting Location associated with it. You will have the opportunity to add further posting locations once the Royal Mail Account has been added.

Posting Location *

OBA Access Code *

Receiving Hub *

Figure 17: OBA Access Code Pending

6. Select the Royal Mail hub the customer will be sending their shipments to from the drop-down list.
 7. If the customer's return address is different from their shipping address, then enter the returns address details. If a returns address is not entered then the customer's shipping address will be used for returns, or if the customer is using the system via API, they can specify a returns address in the Shipper section of the API request.
 8. Once all details have been entered, select the "Add Royal Mail Account" button. This will save the customer's Royal Mail account details and the screen will update. The OBA Access Code will be set to 'Pending' and the customer's Royal Mail Account Status will be set to 'Disabled'.
- NOTE:** It will not be possible to create shipments for the Royal Mail account until the Access Code has been entered.

If you don't want this customer to use the main Royal Mail Account, or your system doesn't have a main Royal Mail Account, add a Royal Mail Account here. This is the one that will then be used for this customer. If there is a main Royal Mail Account it is maintained through the [Royal Mail Label Integration](#).

Royal Mail Account Status: Disabled

Royal Mail Account Number *: 0059786901

Update Delete

Posting Locations Add Posting Location

| Posting Location | OBA Access Code | Receiving Hub | Return Name | Return Address |
|------------------|-----------------|---------------|-------------|----------------|
| 333333333 | PENDING | 002598 | | |

Figure 18: Royal Mail Account details saved

9. The Royal Mail OBA team will be notified the Access Code has been requested. You will receive an email detailing the next steps in the process (this will be sent to the email address of the user account you are logged in under).
10. Royal Mail will add the Access Code to customer account within 2-5 working days. Once this is done, the OBA Access Code field will be updated to display the correct Access Code and the Royal Mail Account Status will be changed to 'Enabled'. You will receive an email informing you the customer's Royal Mail account has been activated (this will be sent to the email address of the user account you were logged in under when the access code request was submitted).

If you don't want this customer to use the main Royal Mail Account, or your system doesn't have a main Royal Mail Account, add a Royal Mail Account here. This is the one that will then be used for this customer. If there is a main Royal Mail Account it is maintained through the [Royal Mail Label Integration](#).

Royal Mail Account Status: Enabled

Royal Mail Account Number *: 0059786901

Update Delete

Posting Locations Add Posting Location

| Posting Location | OBA Access Code | Receiving Hub | Return Name | Return Address |
|------------------|-----------------|---------------|-------------|----------------|
| 333333333 | 369258147 | 002598 | | |

Figure 19: OBA Access Code added to Royal Mail Account details

NOTE: The customer's Royal Mail account will be checked against OBA once every 24 hours, and if the customer's account is not active in OBA then Royal Mail Account Status will be changed to back 'Disabled'. It will not be possible to create Royal Mail shipments for the account whilst the account whilst the Royal Mail Account Status is 'Disabled'.

11. Once the Access Code has been added, the service contracts available for the customer's Royal Mail account will need to be validated against OBA – this will be done automatically once every 24 hours, or can be done manually by following the instructions in the [Update Service Contracts](#) section.

NOTE: If a customer's Royal Mail account number or Posting Location number changes, their Royal Mail account will need to be deleted from their Intelligent Shipper customer account and the above steps repeated for the new account or Posting Location details. This is to ensure the account details in Intelligent Shipper match those in OBA, and the customer is not prevented from creating Royal Mail labels when the automated OBA validation checks are run.

5.1 Update Service Contracts

Once a customer's Royal Mail account details have been added to their customer record, the customer's service contracts list can be updated by validating the customer's service contracts against OBA.

To update service contracts for a customer:

1. Select Maintenance > Customers.
2. Select the customer from the customers list to open the Edit Customer screen, then select the Royal Mail Account tab.
3. Click the "Validate Service Contract" button.

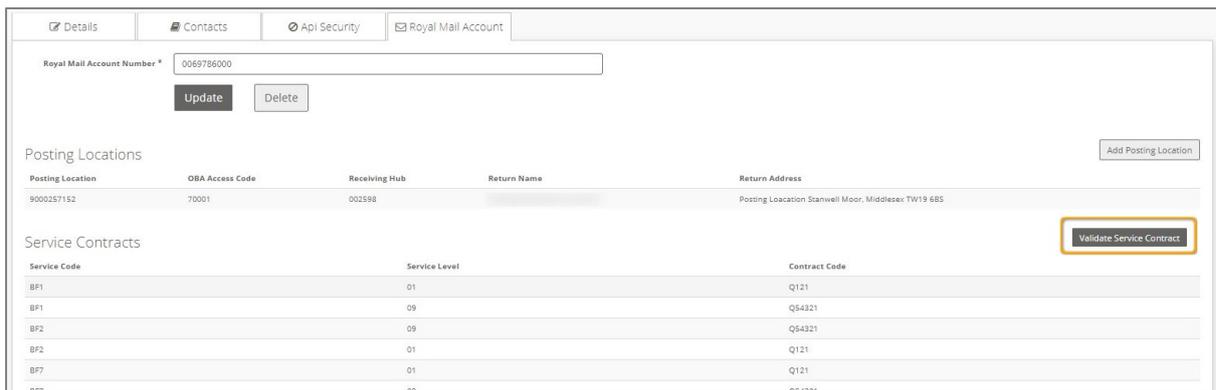


Figure 20: Validate service contracts

5.1.1 Service Contracts Updated Successfully

Intelligent Shipper will check the service contracts assigned to the customer in OBA and update the Service Contracts list. Any new services added to the customer account in OBA will be added to the Service Contracts list, and any service contracts that are no longer assigned to the customer in OBA will be removed from the list.

5.1.2 Service Contracts Not Updated

If the customer's service contracts cannot be validated against OBA, e.g. if the customer's Royal Mail account is on stop, then an error message will be displayed in the top right corner of the screen. The customer will need to contact Royal Mail Finance to discuss their account.

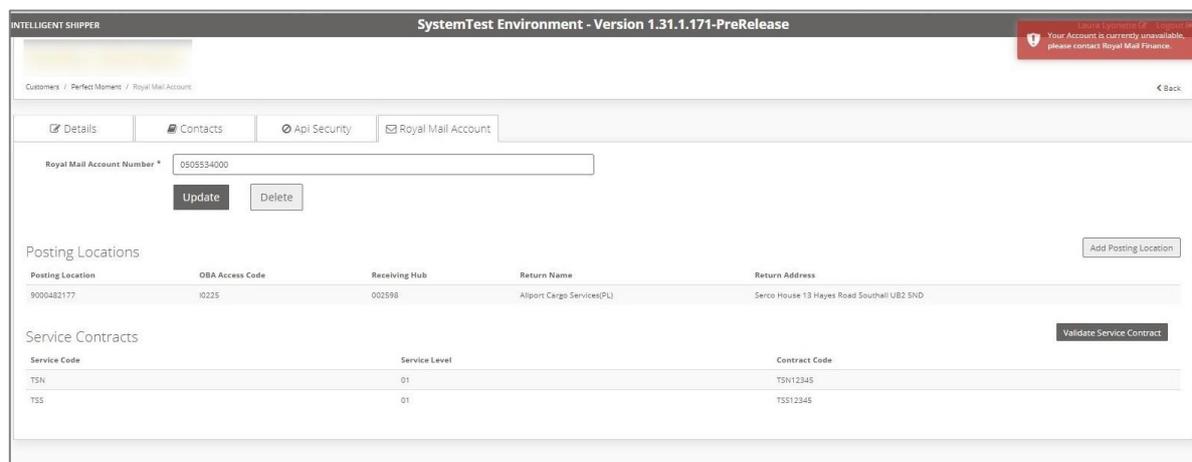
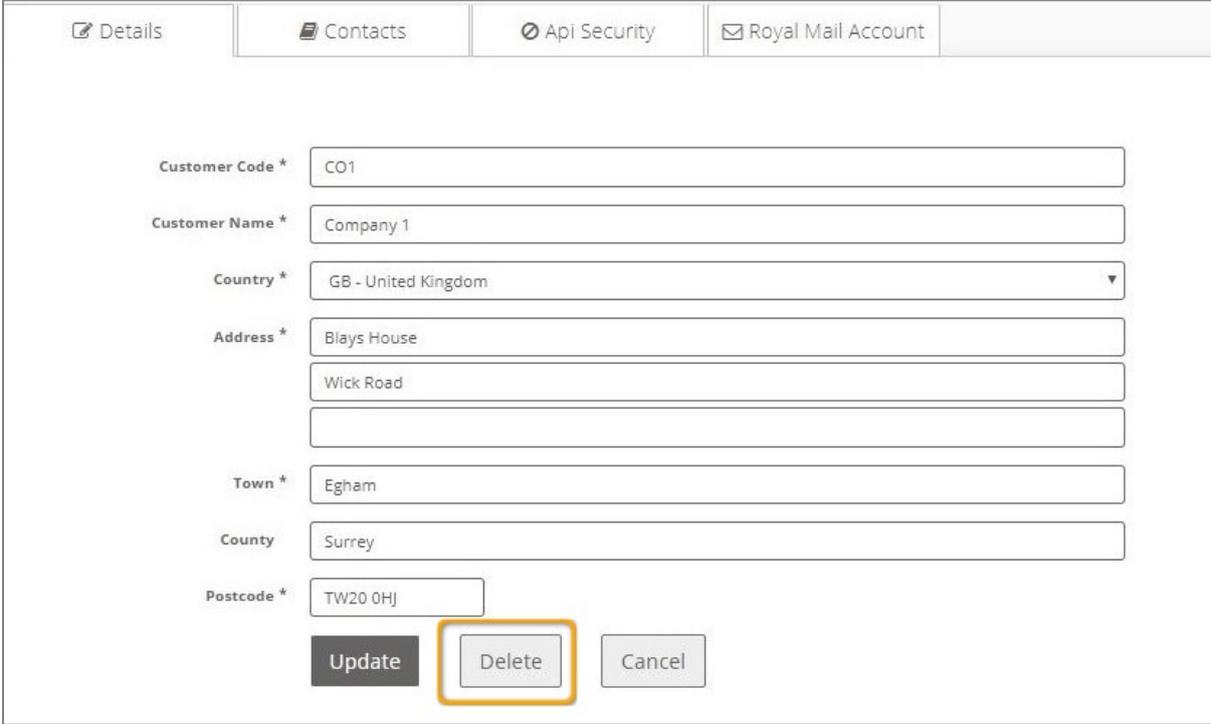


Figure 21: Unable to validate service contracts error message

6 Delete Customer Account

If a customer account is no longer needed it can be deleted from Intelligent Shipper.

1. To delete a customer account, open the Edit Customer screen for that customer and select the 'Delete' button.



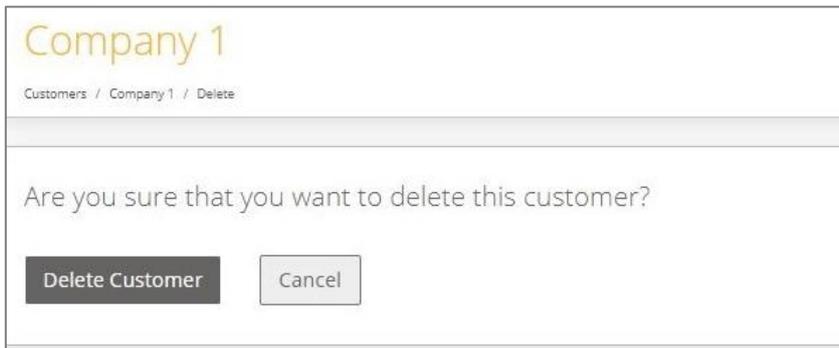
The screenshot shows the 'Edit Customer' screen with a navigation bar at the top containing 'Details', 'Contacts', 'Api Security', and 'Royal Mail Account'. The main form contains the following fields:

- Customer Code *: CO1
- Customer Name *: Company 1
- Country *: GB - United Kingdom
- Address *: Blays House, Wick Road
- Town *: Egham
- County: Surrey
- Postcode *: TW20 0HJ

At the bottom of the form are three buttons: 'Update', 'Delete', and 'Cancel'. The 'Delete' button is highlighted with a yellow border.

Figure 22: Customer screen Delete button

2. You will be prompted to confirm whether you want to delete the customer account.



The screenshot shows a confirmation dialog box for 'Company 1'. The breadcrumb trail is 'Customers / Company 1 / Delete'. The message asks: 'Are you sure that you want to delete this customer?'. At the bottom are two buttons: 'Delete Customer' and 'Cancel'.

Figure 23: Delete customer account confirmation message

3. To continue and delete the account, select the 'Delete Customer' button. This will remove the customer account from the system.
4. If the 'Cancel' button is selected, the message will be dismissed and the customer account will not be deleted.

7 Appendix 1 – Glossary

| Term | Definition |
|------|--|
| OBA | Online Billing Account - Royal Mail's billing platform |