

Intelligent Shipper

Departments Maintenance Manual Version 1.0

Document Owner	INTERSOFT Systems and Programming Limited
Version	1.0
Date	24/10/2018
Description	Instructs Customer users how to setup department maintenance for use when creating shipments
Author	Laura Lyonette

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
0.1	First draft	12/10/2018	Laura Lyonette
0.2	Screen shots updated for figure 4, 5 and 7.	16/10/2018	Laura Lyonette
1.0	Final version	24/10/2018	Laura Lyonette

Review

Name	Title	Date Reviewed	Version Reviewed
Arnold Christian	Test & Support Lead	23/10/2018	0.2
Beata Brewer	Customer Services Manager	24/10/2018	0.2
James Thomas	Managing Director	24/10/2018	0.2

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 Maintain Department Information.....	5
4.1 Royal Mail Departments	6
4.2 Add and Edit Departments.....	7
4.3 Using Departments When Creating Shipments	9
4.3.1 <i>Create Shipment via Booking Wizard</i>	9
5 Appendix 1 – Glossary.....	11

2 Table of Figures

Figure 1: Select Departments from Maintenance Menu	5
Figure 2: Departments Screen	6
Figure 3: Refresh Departments	6
Figure 4: Departments List.....	7
Figure 5: Manually Add Department	7
Figure 6: Add Department Screen	8
Figure 7: Departments List with Manually Added Department.....	8
Figure 8: Edit Department Screen.....	9
Figure 9: Booking Wizard – Department Field	10
Figure 10: Booking Wizard – Department Selected.....	10

3 Introduction

The Intelligent Shipper Departments functionality allows you to maintain department details for use when creating shipments. Royal Mail departments can be imported from OBA to ensure correct department information is sent to Royal Mail with the shipment details, or you can maintain your own department information to simplify the process of creating shipments via the Booking Wizard.

This user manual instructs Customer users how to setup and maintain departments, and how this department information will then be used when creating shipments.

4 Maintain Department Information

To maintain department information in Intelligent Shipper, select "Maintenance" from the left-hand menu and then select "Departments".

The Departments maintenance screen will open:

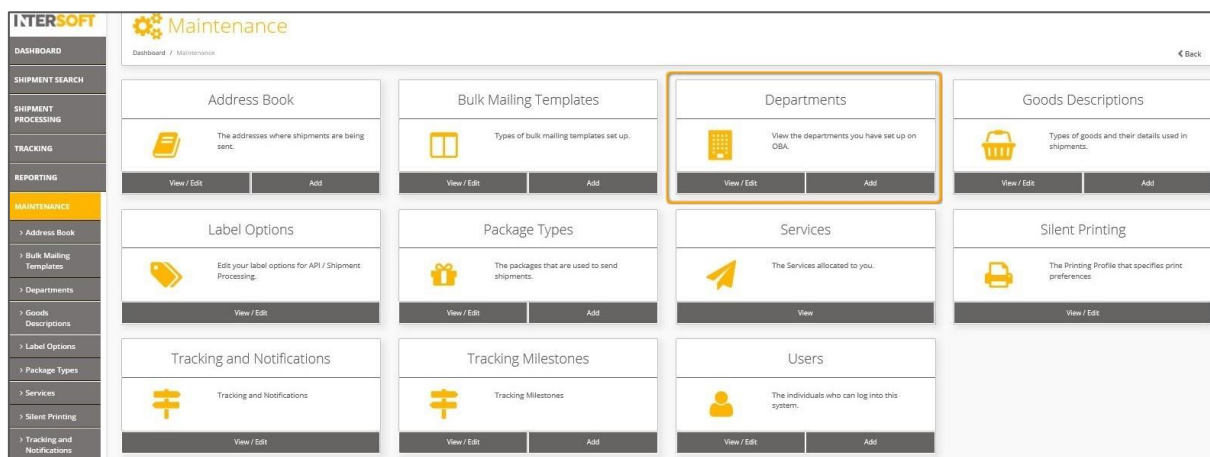


Figure 1: Select Departments from Maintenance Menu

In this screen you are able to:

1. Refresh Royal Mail departments by importing department details from OBA
2. Add and edit details of your own departments

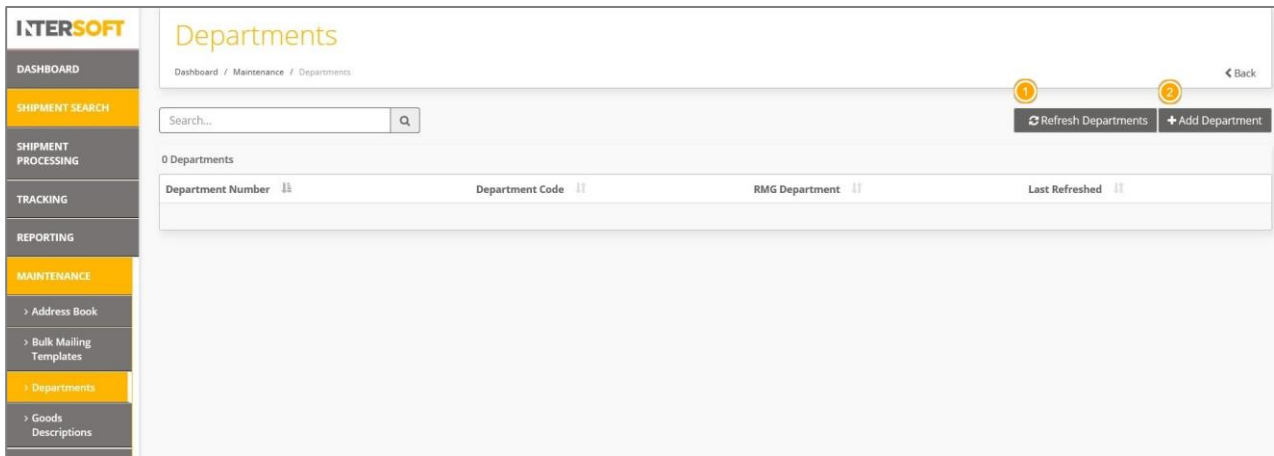


Figure 2: Departments Screen

4.1 Royal Mail Departments

To import Royal Mail department details, your Administrator user will first need to have entered your Royal Mail account details in the Customer screen.

Once this has been done, you can select the "Refresh Departments" button to update your Royal Mail department details.

When the button is selected, Intelligent Shipper will use the Royal Mail account details the Administrator entered in the Customer screen to check the departments that are available in OBA for your customer account.

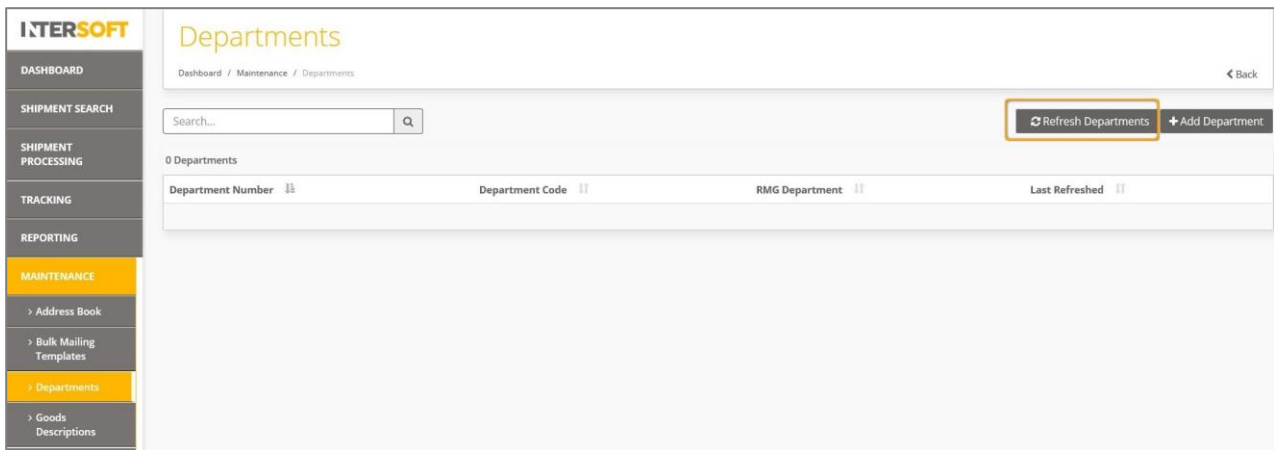


Figure 3: Refresh Departments

The screen will be updated with a list of the departments assigned to your Royal Mail account.

The following information will be displayed for each department:

1. Department number

2. Department code
3. RMG department - flag showing whether the department is a Royal Mail department. This column will always contain a tick for departments added via the "Refresh Departments" button.
4. Last refreshed - date and time the department details were last refreshed.

Department Number	Department Code	RMG Department	Last Refreshed
2000445708	Sales	✓	12 Oct 2018 14:39
2000455891	Post Room	✓	12 Oct 2018 14:39
2000462838	Returns	✓	12 Oct 2018 14:39
2000467842	Warehouse	✓	12 Oct 2018 14:39
2000484235	Customer Service	✓	12 Oct 2018 14:39

Figure 4: Departments List

Royal Mail departments cannot be edited in Intelligent Shipper. Once a Royal Mail department has been added, department details can be edited by selecting the "Refresh Departments" button again. The departments list will then be updated with the latest department details stored in OBA for your Royal Mail account.

4.2 Add and Edit Departments

As well as maintaining Royal Mail department details, you can also add and edit your own departments in Intelligent Shipper.

To add your own departments, select the "Add Department" button in the Departments screen.

Department Number	Department Code	RMG Department	Last Refreshed
2000445708	Sales	✓	12 Oct 2018 14:39
2000455891	Post Room	✓	12 Oct 2018 14:39
2000462838	Returns	✓	12 Oct 2018 14:39
2000467842	Warehouse	✓	12 Oct 2018 14:39
2000484235	Customer Service	✓	12 Oct 2018 14:39

Figure 5: Manually Add Department

The Add Department screen will then open.

To add a new department:

1. Enter a Department Number
2. Enter a Department Code
3. Click "Add Department"

Figure 6: Add Department Screen

The department will then be added to the Departments list.

The RMG Department column will be blank for departments that are manually entered.

Department Number	Department Code	RMG Department	Last Refreshed
2000445708	Sales	✓	12 Oct 2018 14:39
2000455891	Post Room	✓	12 Oct 2018 14:39
2000462838	Returns	✓	12 Oct 2018 14:39
2000467842	Warehouse	✓	12 Oct 2018 14:39
2000484235	Customer Service	✓	12 Oct 2018 14:39
R01	Returns		12 Oct 2018 14:52

Figure 7: Departments List with Manually Added Department

Departments that have been manually entered can be edited by clicking on the department row in the Departments list.

This will open the Edit Department screen, where you can edit the Department Number and Department Code.

Returns

Dashboard / Maintenance / Departments / Edit Departments ← Back

Created by Laura Lyonette on 12 Oct 2018 14:52

Department Number

Department Code

Figure 8: Edit Department Screen

4.3 Using Departments When Creating Shipments

When creating shipments, the department information entered for the shipment does not need to match the departments list in the Departments screen for the shipment to be created.

When a Royal Mail shipment is created, Intelligent Shipper will check the department information entered for the shipment against the Royal Mail departments listed for your customer account in the Departments screen to ensure the correct department information is sent to Royal Mail for billing purposes.

For both Royal Mail and non-Royal Mail shipments, you can also create shipments using department details that are not entered in the Departments screen.

4.3.1 Create Shipment via Booking Wizard

When creating shipments via the Booking Wizard, setting up departments in the Department screen will reduce the manual data entry needed.

To open the Booking Wizard, select Shipment Processing from the left-hand menu and then Booking Wizard.

The Collection Info & Address tab contains a Department field. When you start typing a department name or number saved in the Departments screen in this field, a list of the matching department details will be displayed.

INTERSOFT Booking Wizard

Dashboard / Shipment Processing / Booking Wizard ← Cancel

① Collection Info & Address ② Destination Address ③ Shipment Contents ④ Review

Step 1
The Shipper
 Please complete the shipper's information. This is the collection address for the shipment.
 The shipper will need a printer to print their labels and customs documents.

Reference * 12345 Department re ×
 Returns - R01

Contact Name Laura Lyonette

Company Name * GetAccount 2

Address *
 Blays House
 Englefield Green
 Wick Road

Town * Egham

County Surrey

Country * United Kingdom

Postcode * TW20 0HJ

Figure 9: Booking Wizard – Department Field

Select the department you want to use for the shipment from the list. The Department field will then display the department details entered in the Department screen.

INTERSOFT Booking Wizard

Dashboard / Shipment Processing / Booking Wizard ← Cancel

① Collection Info & Address ② Destination Address ③ Shipment Contents ④ Review

Step 1
The Shipper
 Please complete the shipper's information. This is the collection address for the shipment.
 The shipper will need a printer to print their labels and customs documents.

Reference * 12345 Department Returns - R01 ×
 Returns - R01

Contact Name Laura Lyonette

Company Name * GetAccount 2

Address *
 Blays House
 Englefield Green
 Wick Road

Town * Egham

County Surrey

Country * United Kingdom

Postcode * TW20 0HJ

Figure 10: Booking Wizard – Department Selected

5 Appendix 1 – Glossary

Term	Definition
OBA	Online Business Account - Royal Mail's billing system