

# **Intelligent Shipper**

# Hold Shipments Manual Version 1.0

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Author	Deepa Sankaran

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## **1** Document Controls

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	release		

#### Review

Name	Title	Date Reviewed	Version Reviewed
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Lalitha Musnuri	Senior Test Analyst	23/03/2019	0.2&0.3

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# INTERSOFT

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#### **3** Introduction

Hold Shipments is a functionality in the Intelligent Shipper System that enables Customer users to place shipments on hold up until the point of close out or scheduled close out via clean sweep, so that shipments that are not ready to be shipped can be excluded from the close out process. The held Shipments can either be released to be closed out or can be cancelled if the shipment is no longer required.

This feature can be used if you find that you are no longer be able to fulfil the shipment that day and need to exclude from the collection manifest or from the close out process, until you are ready to ship the item. Prior to the introduction of this feature you might have to cancel and re-book the shipment when it cannot be fulfilled on the day.

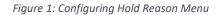
This manual instructs Customer users on how to put shipments on hold via GUI that have not been closed out.

#### 4 Configuring Hold Reasons

Before proceeding with hold shipment, a Customer Administrator user for your customer account must ensure that the reasons for placing shipments on hold are configured in the system. It will not be possible to put shipments on hold until these hold reasons have been configured. To set up hold reasons, you must first login to the system via GUI and follow the steps below:

- 1. Navigate to the Maintenance on the left pane menu
- 2. Click "Maintenance"
- 3. Click on "Hold Reasons"

INTERSOFT	Hold Reaso	ns	
DASHBOARD	Dashboard / Maintenance / Hol	d Reasons	< Back
SHIPMENT SEARCH	Search	Q	+Add Hold Reason
SHIPMENT PROCESSING	3 Hold Reasons		
TRACKING	타 Hold Reason	11 Created	1 Last Modified
REPORTING	Awaiting Part	28 Feb 2019 12:47 by Test Customer	07 Mar 2019 16:31 by
REPORTING	Customs Clearance	28 Feb 2019 12:48 by Test Customer	
MAINTENANCE	Testing Hold Reason	07 Mar 2019 13:17 by	
> Address Book			1
> Bulk Mailing Templates			
> Departments			
> Goods Descriptions			
> Hold Reasons			





4. A screen will be displayed with an option to enter a hold reason in the text box.

INTERSOFT	Add a new Hold Reason	
DASHBOARD	Dashboard / Maintenance / Hold Reasons / Add Hold Reason	< Back
SHIPMENT SEARCH		
SHIPMENT PROCESSING	Hold Reason * Add Hold Reason Cancel	
TRACKING		
REPORTING		
MAINTENANCE		
> Address Book		
> Bulk Mailing Templates		
> Departments		

Figure 2: Add a New Hold Reason Screen

5. Enter a reason in the text box and click "Add Hold Reason" button.

INTERSOFT	Add a new Hold Reason	
DASHBOARD	Dashboard / Maintenance / Hold Reasons / Add Hold Reason	< Back
SHIPMENT SEARCH		
SHIPMENT PROCESSING	Hold Reason * Further Info Required Add Hold Reason Cancel	
TRACKING		
REPORTING		
MAINTENANCE		
> Address Book		
> Bulk Mailing Templates		
> Departments		
> Goods Descriptions		
> Hold Reasons		
Label Options		

Figure 3: Enter Hold Reason in Add a New Hold Reason Screen



6. A message "The hold reason has been added successfully" will be displayed. You can now see the newly added reason in the hold reason list. The hold reasons displayed in the list will be available for you to select from when putting shipments on hold.

I TERSOFT	Hold Reasor	IS	
DASHBOARD	Dashboard / Maintenance / Hold R	easons	K Back
SHIPMENT SEARCH	Search	Q	+Add Hold Reason
SHIPMENT PROCESSING	4 Hold Reasons		The hold reason has been added
TRACKING	👫 Hold Reason	I Created	Last Modified
REPORTING	Awaiting Part	28 Feb 2019 12:47 by Test Customer	07 Mar 2019 16:31 by
REPORTING	Customs Clearance	28 Feb 2019 12:48 by Test Customer	
MAINTENANCE	Further Info Required		
> Address Book	Testing Hold Reason		
> Bulk Mailing Templates			1
> Departments			
> Goods Descriptions			
> Hold Reasons			
Label Ontions			

Figure 4: Hold Reason Created Successfully Display Message

7. If the created reason is no longer required, you can also delete the reason by selecting the reason and clicking on the "Delete" button.

INTERSOFT	Further Info Required	
DASHBOARD	Dashboard / Maintenance / Hold Reasons / Edit Hold Reason	< Back
SHIPMENT SEARCH		
SHIPMENT PROCESSING	Hold Reason * Further Info Required	
TRACKING		
REPORTING	Update Delete Cancel	
MAINTENANCE		
> Address Book		
> Bulk Mailing Templates		
> Departments		
> Goods Descriptions	4	
> Hold Reasons		
> Label Options		
> Package Types		

Figure 5: Delete Option to Remove the Hold Reason



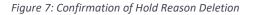
8. A confirmation required message will be displayed. Click "Delete" to remove the created hold reason. If you click "Cancel" the confirmation required message will be dismissed.

INTERSOFT	Further Info Requi	red	
DASHBOARD	Dashboard / Maintenance / Hold Reasons / Edit Hold		< Back
SHIPMENT SEARCH			
SHIPMENT PROCESSING			Created by Deepa Sankaran on 20 Mar 2019 11:21
TRACKING	Hold Reason		
REPORTING			
MAINTENANCE		<b>Confirmation Required</b>	
> Address Book		Are you sure you want to delete this hold reason?	
> Bulk Mailing Templates		Delete Cancel	
> Departments			
> Goods Descriptions			
> Hold Reasons			
> Label Options			
> Package Types			

Figure 6: Confirmation Required Message for Delete Hold Reason

9. A message will be displayed confirming the deletion of hold reason.

INTERSOFT	Hold Reaso	ns	
DASHBOARD	Dashboard / Maintenance / Hold	Reasons	<b>&lt;</b> Back
SHIPMENT SEARCH	Search	Q	+ Add Hold Reason
SHIPMENT PROCESSING	2 Hold Reasons		The hold reason has been deleted
TRACKING	타 Hold Reason	11 Created	11 Last Modified
REPORTING	Awaiting Part	28 Feb 2019 12:47 by Test Customer	07 Mar 2019 16:31 by Lalitha Musnuri
REPORTING	Customs Clearance	28 Feb 2019 12:48 by Test Customer	
MAINTENANCE			1
> Address Book			
> Bulk Mailing Templates			
> Departments			
> Goods Descriptions			
> Hold Reasons			
> Label Options			
> Package Types			



#### 5 Hold Single or Multiple Shipments

This section explains how to place single or multiple shipments on hold via GUI. You can hold both processed and unprocessed shipments before closing out. Customers must have first setup the hold reasons to put any shipments on hold.

1. To view the shipments, you must first navigate to the "Shipment Processing" screen.

INTERSOFT	Booking Sta	tistics					
DASHBOARD							
Booking Statistics		uote 📕	Track 📕	Shipment Search	Users 🔺	Help ?	
> Shipping Profiler	New	uote	Irack	snipment search 🔍	Users 🗕	Help	
SHIPMENT SEARCH	Today's Shipment Star	istic					*
SHIPMENT PROCESSING	New Shipments					Ch	ipped
TRACKING	0						0
REPORTING		1 2	3 4 5 6 7 8 9		16 17 18 19 20 21 22	23 24	
MAINTENANCE		Shipments per	Hour	Today Yesterday			
QUOTATION			Cancelled	Unprocessed	Processed	Countries	Geo 📀
			0	111	229	0	
	Last Updated: 09:17						
	7 Day Shipment Statis	tics					*
		<sup>ments</sup>	Cancelled	Shipped 55 ▼-45.00% from last week	In Transit	Delivered O	1 Month 14 Days 7 Days 1 Day

Figure 8: Shipment Processing Screen

2. To place a shipment on hold, click "View Shipments" link of the related carrier.

TERSOFT	🚊 Shipment Processing	
DASHBOARD	Dashboard / Shipment Processing	< Back
SHIPMENT SEARCH	Today	Booking Wizard Bulk Mailing IIII Scan Unprocessed Shipments
SHIPMENT PROCESSING		
> Booking Wizard	Processed Shipments (123)	Unprocessed Shipments (37)
> Bulk Mailing	Last Updated 11 Mar 2019 15:11:23	Last Updated 11 Mar 2019 15:11:23
> Scanning		
> Manifest History	Image: Second state         Hold all shipments         + View Services	Hold all shipments + View Services
TRACKING	Shipment Count: 3 Total Weight: 1.752 KG  Closeout View Shipments	Shipment Count: 13 Total Weight: 13.900 KG
REPORTING	TIEM SUBJECTS	View Shipments
MAINTENANCE	FEDEX Hold all shipments + View Services	DHL (Express) Hold all shipments + View Services
QUOTATION	Shipment Count: 42 Total Weight: 121.600 View Shipments KG Closeout	Shipment Count: 3 Total Weight: 11.200 KG View Shipments

Figure 9: View Shipments- Shipment Processing Screen

- 3. The shipments will be displayed in the shipment processing view shipments screen.
- 4. Click the "tick box "of the required shipment to be placed on hold. Multiple shipments can also be selected to be placed on hold at the same time.



- 5. You can also place all the displayed shipments on hold by clicking the tick box next to "last modified" menu.
- 6. Click the "Hold Shipments" button to proceed with selected shipments.

INTERSOFT	Ship	ment P	rocessing -	- 1	iew Shipments							
DASHBOARD			2 - IE2 - INTERNATI									
SHIPMENT SEARCH	Dashboard /	Shipment Processing	/ Shipments								<	Back
SHIPMENT PROCESSING	Tracking Nur	nber, Reference, I	Postcode Q		Today	Held Shipments Cancelled Shipments			Hold Shipme	ents	Cancel Ship	ments
> Booking Wizard	3 Shipments											1
<ul> <li>&gt; Bulk Mailing</li> <li>&gt; Scanning</li> </ul>		11 Shipment Date	Shipper Reference		Destination	Service	Packages	Weight	Tracking Number		† Last Modified	
> Manifest History	🕎 dpd	08 Mar 2019	DB08032019DPDNLIE2	ю	General Williamson and a Marcal, American shares 1927 - Chi, Rambardamah 🖬	302 - IE2 - INTERNATIONAL EXPRESS	1	1.152kg	05178005900040 S	ю		
TRACKING	🜍 dpd	11 Mar 2019	DB08032019DPDNLCL	в	taan faharaan kuta ahir ka amaandarin. 1979 (Ja, Baabaatan da 🗃	302 - IE2 - INTERNATIONAL EXPRESS	1	0.300kg	05178005900035 S	16		
MAINTENANCE	🕎 dpd	11 Mar 2019	DB08032019DPDNLCL	16	fan felen områen illeret der der det det i det som en s	302 - IE2 - INTERNATIONAL EXPRESS	1	0.300kg	05178005900036 💊	В		0
QUOTATION												1

Figure 10: Tick Box & Hold Shipment Button in the Shipment Processing Screen

- 7. A message will be displayed asking for a hold reason to be selected.
- 8. Select the reason for hold from the drop-down menu and click the "Yes" button. If you click the "No" button the "Confirmation Required" message will be dismissed. Please note that it will not be possible to confirm the shipment hold until a hold reason is selected.
- 9. The selected shipment will now be put on hold and can be viewed using "On hold/view Held Shipments" link.

INTELLIGENT SHIPPER =	SystemTest Environment	alanas.					
INTERSOFT	Shipment Processing - View Shipments						
DASHBOARD	Dashboard / Shipment Processing / Sh	×				<	Back
SHIPMENT SEARCH	Confirmation Required			Hold		ents Cancel Shipr	
SHIPMENT PROCESSING	Tracking Number, Reference, Post:     Held shipments will not be included in any manifest / closeout of     shipments.				1112111	Concer Ships	
> Booking Wizard	Reason for Hold Customs Clearance					11 A	
> Bulk Mailing	La Shipment Si Date R	age	s Weight	Tracking Number		Last Modified	
> Scanning	Image: March and March		0.200kg	05178005900075 •	в	COMPANY AND PROPERTY OF	Ø
> Manifest History	Image: West of the second se		0.200kg	05178005900077 S		12 Mar 2010 T L'ILL by Desponses or the	
TRACKING							
REPORTING							
MAINTENANCE							
QUOTATION							

*Figure 11: Confirmation Required Message* 



#### 5.1 Place Single Shipment on Hold via the View Shipment Screen

You can also place a single shipment on hold 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 view the single shipment details via the view shipment screen, click the required shipment as shown below.

INTERSOFT	Ship	ment P	rocessing	- V	iew Shipments							
DASHBOARD		Shipment Processing									<b>&lt;</b> E	Back
SHIPMENT SEARCH	Tracking Nu	imber, Reference, I	Postcode Q		Today View Cance	Shipments Iled Shipments			Hold Shipme	nts	Cancel Shipm	hents
SHIPMENT PROCESSING	75 Shipments										1 2 3	4
> Booking Wizard > Bulk Mailing		11 Shipment Date	Shipper Reference		Destination	Service	Packages	Weight	Tracking Number		Last Modified	0
> Scanning	_DHL_	14 Mar 2019	DB070820180927	10	McDingah Kamazola, Darlaster, 2988, Untertitates (PAnarca 1988)	DHLD - DHL Express Worldwide WPX	1	1.000kg	8358518210 💊	ю	14 Mar 2019 15:23 by Test Customer	
TRACKING	_DHL_	14 Mar 2019	DHLAdomGB2GB / Depart01-Invoice	В	Express Merchant Serves, London, 1gt 1 WC United Singlese M	DHLA - DHL Domestic Express	1	4.000kg	8319505880 S	6	14 Mar 2019 15:23 by Test Customer	
REPORTING	_20##L_	14 Mar 2019	MaxItemDescription	10	Ny Company Horn, Lijbert, 1902-04 United Kingdom 🖬	DHLA - DHL Domestic Express	9	18.000kg	8319506775 S	В	14 Mar 2019 15:23 by Test Customer	
QUOTATION		14 Mar 2019	DB070820180927	IC.	McDouget Rescutts, Charlenton, 20001. Inned Second Innerse 🖬 🖉	DHLD - DHL Express Worldwide WPX	1	1.000kg	<u>6853379466</u> •	В	14 Mar 2019 15:23 by Test Customer	
		14 Mar 2019	DB070820180927	N.	Mallengala Hense ander, Charlenten, 2007), Derbed Karsel of America 🖬	DHLD - DHL Express Worldwide WPX	1	1.000kg	<u>6853379481</u> 🗣	ю	14 Mar 2019 15:23 by Test Customer	
	_DHL_	14 Mar 2019	DB070820180927	16	NECCORD PERCENTIS, Charleston, 19413, Inclust Reaso of Investiga	DHLD - DHL Express Worldwide WPX	1	1.000kg	<u>6853379492</u>	ю	14 Mar 2019 15:23 by Test	

Figure 12: Hold Shipment by Viewing the Shipment Detail

2. The View Shipment screen will be displayed with a hold and cancel button.

Shipment Information					
Intersoft_Test			Tracking Number	8457018430 🚯 copy	
Blays House Englefield Green			UNI	JJD01100000003986412	
Wick Road			Reference	1234567	
Egham Surrey TW20 0HJ W UNITED KINGDOM			Shipping Date	19 Mar 2019	
			Expected Delivery Date	22 Mar 2019	
aura.lyonette@intersoft.co.uk 01784777170			Agent	DHL (Express)	
			Service	DHLA - DHL Domestic Express	
⊘ Cancel 🔽 Hold			Status	Client Unprocessed - Scanned	
Package Information	NDX	Items: 3	Packages: 2	/alue: £75.00 (GBP)	Weight: 2.500 KG
Pricing Information	Zone: 1				

Figure 13: Hold Button in the View Shipment Screen



3. Click on hold button to put the shipment on hold, a confirmation required screen will be displayed and a reason must be selected. When the "Yes" button is selected, the shipment will be placed on hold. If "No" is selected, then the confirmation required message will be dismissed.

8457018430 Dashboard / Shipment Search / Shipment	Confirmation Required	×
Shipment Information	Held shipments will not be included in any manifest / closeout of shipments.	
Intersoft_Test Blays House	Reason for Hold Awaiting Part V	130 🚯 <u>copy</u> 3000003986412
Englefield Green Wick Road Egham Surrey TW20 0HJ Egham Ed KINGDOM	Are you sure you want to hold this shipment?	019
laura.lyonette®intersoft.co.uk 01784777170	YES No	)19 ress) HL Domestic Express

Figure 14: Confirmation Required for Hold

4. An "On Hold" flag with "Hold Reason" will be displayed next to the shipment information header and a confirmation message will be displayed in the top right corner of the screen. The text of "Hold" button will be changed to "Release"

Shipment Information On Hold - Awaiting Part			The shipment has been successfully put on hold
Intersoft_Test Blays House Englefield Green Wick Road Egham Surrey TW20 0HJ WUNITED KINGDOM Iaura.lyonette@intersoft.co.uk 01784777170	Tracking Number UNI Reference Shipping Date Expected Delivery Date Agent Service Status	8457018430         Image: Separation of	

Figure 15: Hold Shipment via View Shipment Detail Screen

# 6 View on Hold Shipments

"View Shipments" and "On Hold" links in the shipment processing screen helps you to review the shipments that are on hold, especially before closing out. Upon reviewing, you can then decide either to release the shipment or to cancel the shipment.

- 1. To view the shipments on hold, you must first navigate to the Shipment Processing screen.
- 2. Click the "On Hold" link that is displayed on the screen.

INTELLIGENT SHIPPER	SystemTest Environment - Version	25 4 470 DeaDalazea
INTERSOFT	🚊 Shipment Processing	
DASHBOARD	Dashboard / Shipment Processing	< Back
SHIPMENT SEARCH	Today	Booking Wizard Bulk Mailing IIII Scan Unprocessed Shipments
SHIPMENT PROCESSING		
> Booking Wizard	Processed Shipments (129)	Unprocessed Shipments (37)
> Bulk Mailing	Last Updated 11 Mar 2019 14:26:27	Last Updated 11 Mar 2019 14:26:27
> Scanning		
> Manifest History	DPD Hold all shipments + View Services	Hold all shipments + View Services
TRACKING	×	
REPORTING	Shipment Count: 2 Total Weight: 60.450 KG Closeout View Shipments	Shipment Count: 13 Total Weight: 13.900 KG View Shipments
MAINTENANCE	Hold all shipments + View Services	
QUOTATION	S dpd DPD Local	DHL (Express) Hold all shipments + View Services
	Shipment Count: 2 Total Weight: 130.000 View Shipments KG Closeout	Shipment Count: 3 Total Weight: 11.200 KG View Shipments

Figure 16: On Hold Option in Shipment Processing Screen

3. A screen will be displayed listing all the shipments that are currently on hold.

ITERSOFT	Ship	ment P	rocessing	- Vi	ew Shipments On	Hold						
DASHBOARD	Dashboard /	Shipment Processing	/ Shipments								<	Back
SHIPMENT SEARCH	Tracking Nu	mber, Reference,	Postcode Q					R	elease Shipm	ents	Cancel Shipn	nents
SHIPMENT PROCESSING	106 Shipment	s		_						1 2	3 4 5	6
> Booking Wizard		ll Shipment Date	Shipper Reference		Destination	Service	Packages	Weight	Tracking Number		11 Last Modified	
> Bulk Mailing > Scanning	_DHL_	19 Feb 2019	MultipieceGBDHLA (OnHold - Customs Clearance)	В	My Company Name, Egham, TW20 0HJ, United Kingdom 🔛	DHLA - DHL Domestic Express	2	10.000kg	<u>6743043193</u>	ю		
> Manifest History	-DHL_	19 Feb 2019	Test (OnHold - Customs Clearance)	В	DArmed, Mough, 10.3210, Underdroughtern	DHLA - DHL Domestic Express	3	4.200kg	6743043440 •	16		C
REPORTING	_DHL_	19 Feb 2019	Test (OnHold - Customs Clearance)	16	2 Monard, Mongh, 31,7 28, Berley Kingdom.	DHLA - DHL Domestic Express	3	4.200kg	<u>6743043521</u> •	16		
	_DHL_	19 Feb 2019	Test (OnHold - Customs Clearance)	ю	Tultumed, Skough, St OS3 Arstad Hangdom	DHLA - DHL Domestic Express	3	4.200kg	<u>6743043543</u> •	ю		
	-DHL_	19 Feb 2019	Test (OnHold - Customs Clearance)	10	2.55mm) Shogh (5.135), limited Gryslere	DHLA - DHL Domestic Express	3	4.200kg	<u>6743043602</u> <b>%</b>	6		

Figure 17: List of All Shipments that are on Hold



4. You can also access the shipments that are on hold using the "View Shipments" link in the shipment processing screen.

INTERSOFT	🚊 Shipment Processing	
DASHBOARD	Dashboard / Shipment Processing	<b>≮</b> Back
SHIPMENT SEARCH	Today	Booking Wizard Bulk Mailing
SHIPMENT PROCESSING	Processed Shipments (121)	Unprocessed Shipments (37)
> Booking Wizard	Last Updated 11 Mar 2019 15:38:32	Last Updated 11 Mar 2019 15:38:32
> Scanning		
> Manifest History TRACKING	DHL (Express)         Hold all shipments         + View Services           Shipment Count: 1         Total Weight: 10.000 KG         Image: Closeout	Hold all shipments + View Services
REPORTING	View Shipments	Shipment Count: 13 Total Weight: 13.900 KG View Shipments
	FEDEX         Hold all shipments         + View Services           Shipment Count: 42         Total Weight: 121.600         Image: Count Services	DHL (Express) Hold all shipments + View Services
	View Shipments KG	Shipment Count: 3 Total Weight: 11.200 KG View Shipments

Figure 18: View Shipments in Shipment Processing Screen

- 5. Click "View Shipments" link. All the shipments related to the service will be displayed in the screen.
- 6. Click "View Held Shipments" link.

INTERSOFT	Ship	ment P	rocessi	ng	- View Shipment	S						
DASHBOARD	Dashboard /	Shipment Processing	7 Shipments								<	Back
SHIPMENT SEARCH	Tracking Nur	mber, Reference,	Postcode	Q	Today	View Held Shipments			Hold Shi	pmer	nts Cancel Shipr	ments
SHIPMENT PROCESSING	42 Shipments	noor, reference,	rostcode		Today	View Cancelled Shipments					1 2	2 3
> Booking Wizard > Bulk Mailing		↓ Shipment Date	Shipper Reference		Destination	Service	Packages	Weight	Tracking Number		Last Modified	
> Scanning	UKMail	19 Feb 2019	0/25/1234	В	Mir (ohn Maaithail, Sacilhamana), Milli, Brigan 🖬	FED1 - FedEx International Priority®	1	3.250kg	794661974269 •	16	19 Feb 2019 16:52 by API	
> Manifest History		19 Feb 2019	0/25/1234	ю	ter gebe etwaltal, modtarezied, term. Reigen 👪	FED1 - FedEx International Priority®	1	3.250kg	794661974188 🗣	ю	19 Feb 2019 16:52 by API	
FRACKING		19 Feb 2019	0/25/1234	10	in pire Analital Antiharment 2020, Disputa	FED1 - FedEx International Priority®	1	3.250kg	<u>794661975335</u>	6	19 Feb 2019 17:03 by API	
	UKMail	19 Feb 2019	0/25/1234	16	ne generendenst bereitenstel, tetes Regere 🗰	FED1 - FedEx International Priority®	1	3.250kg	794661975508 •	В	19 Feb 2019 17:04 by API	
		19 Feb 2019	0/25/1234	16	Mr. police Micalifiadi, Backhaerratush, 1986, Oppraci MI	FED1 - FedEx International Priority®	1	3.250kg	794661976802 •	В	19 Feb 2019 17:07 by API	
	UKMail	19 Feb 2019	0/25/1234	в	Repórematikal) fieldamoni) (1999) Endra	FED1 - FedEx International Priority®	1	3.250kg	794661976960 💊	16	19 Feb 2019 17:09 by API	
	UKMail	19 Feb 2019	0/25/1234	10	ide julie: Heraldial, Bretharmateri, 2020). Cristin	FED1 - FedEx International Priority®	1	3.250kg	794661977018 •	в	19 Feb 2019 17:10 by API	

Figure 19: View Held Shipments Option in Shipment Processing Screen





 You can see all the shipments that are on hold for all services will be displayed. Click "Close Held Shipments" if you need to exit the screen. This will return to the previous screen i.e. View Shipments screen

INTERSOFT	Sub	ment P	rocessing -	VI	ew Shipments On	ПОГО						
DASHBOARD	Dashboard /	Shipment Processing	7 Shipments								<b>≮</b> B	ack
SHIPMENT SEARCH	Tracking Nu	mber, Reference,	Postcode Q	]	× Close Held Shipments			R	elease Shipme	ents	Cancel Shipm	ents
HIPMENT PROCESSING	112 Shipment	s								1 2	3 4 5	6
> Booking Wizard		å Shipment Date	Shipper Reference		Destination	Service	Packages	Weight	Tracking Number		Last Modified	
> Bulk Mailing > Scanning	_DHL_	19 Feb 2019	Test (OnHold - Customs Clearance)	16	2 interest Strongth Sci. ( Mg. invested Airsgature -	DHLA - DHL Domestic Express	3	4.200kg	<u>6743043521</u>	ю		C
> Manifest History RACKING	_DHL_	19 Feb 2019	Test (OnHold - Customs Clearance)	16	2 almost livingh (c.) bh annud langton	DHLA - DHL Domestic Express	3	4.200kg	<u>6743043543</u>	в		C
EPORTING	_DHL_	19 Feb 2019	Test (OnHold - Customs Clearance)	10	2 almust Sough SU155, immed lengton	DHLA - DHL Domestic Express	Ş	4.200kg	6743043602 •	ю		C
	_DHL_	19 Feb 2019	Test (OnHold - Customs Clearance)	15	2 showed drough Sci Ma trend Kingdom	DHLA - DHL Domestic Express	3	4.200kg	<u>6743043661</u>	15		
	_DHL_	19 Feb 2019	Test (OnHold - Customs Clearance)	ю	2 street longt Schild, toned trighter.	DHLA - DHL Domestic Express	3	4.200kg	6743043742 •	16		
	_DHL_	19 Feb 2019	MyRef1 (OnHold - Customs Clearance)	В	it animus, features, Tax in Alier 1, industriangulares	DHLA - DHL Domestic Express	5	5.000kg	6743042154 •	10.075		

Figure 20: Close Held Shipment Link to Exit Screen

## 7 Release Shipment

Shipment that are on hold can be released using release shipments. Releasing the shipment will take it off hold so that the shipment can be closed out.

- To access release shipment option, you must first navigate to the list of shipments that are on hold. This can be done using the "On Hold" link in the shipment processing screen or through "View Shipments" link as described in the <u>Section 6</u>
- 2. Choose the shipment you want to release by clicking the "tick box" next to the shipment.
- 3. You can also choose multiple shipments by checking the multiple "tick box".

TERSOFT	Ship	ment P	rocessing -	- Vi	ew Shipments On	Hold						
DASHBOARD	Dashboard /	Shipment Processing	/ Shipments								<	Back
SHIPMENT SEARCH	Tracking Nu	mber, Reference, I	Postcode Q	7				R	elease Shipm	ents	Cancel Shipr	nents
SHIPMENT PROCESSING	113 Shipment	s							ſ	1 2	3 4 5	5 6
> Booking Wizard		Il Shipment Date	Shipper Reference		Destination	Service	Packages	Weight	Tracking Number		Last Modified	
> Bulk Mailing > Scanning	_DHL_	19 Feb 2019	Test (OnHold - Customs Clearance)	ß	1.4mmed, Bough, N. 123, United Heighten	DHLA - DHL Domestic Express	3	4.200kg	<u>6743043440</u> •	10		V
> Manifest History	_DHL_	19 Feb 2019	Test (OnHold - Customs Clearance)	15	2 Mered, Heigh, K.135, Serbel Higher	DHLA - DHL Domestic Express	3	4.200kg	<u>6743043521</u>	ß		
REPORTING	_DHL_	19 Feb 2019	Test (OnHold - Customs Clearance)	IC.	2 illument, Brough, B. Villiji Linited Kingshow.	DHLA - DHL Domestic Express	3	4.200kg	<u>6743043543</u> •	ю		
	_DHL_	19 Feb 2019	Test (OnHold - Customs Clearance)	15	Tultomat, Sough, St. CELLINERPROV	DHLA - DHL Domestic Express	3	4.200kg	<u>6743043602</u>	в		0
	-DHL_	19 Feb 2019	Test (OnHold - Customs Clearance)	16	Tollomad, Sinoph, Sci 1953 Advised Hoppdom	DHLA - DHL Domestic Express	3	4.200kg	<u>6743043661</u>	16		

Figure 21: Release Held Shipments



4. A message will be displayed asking for confirmation you want to proceed with releasing the shipment.

DASHBOARD			-		omp	ments On							
	Dashboard /	Shipment Processing	/ Shipm	Con	firmati	on Boquiro	a ×					<	Back
SHIPMENT SEARCH	Tracking Nun	nber, Reference, I	Postcoc	Con	IIIIIau	on Require	a			Release Shipm	ients	Cancel Shipr	ments
SHIPMENT PROCESSING	113 Shipments		Are y	ou sure		elease the selected s	hipments?				1 2	2 3 4 5	5 6
> Booking Wizard		Il Shipment Date	Ship		YES	No		Packages	Weight	Tracking Number		Last Modified	
> Bulk Mailing > Scanning	.DHL.	19 Feb 2019	Test (OnHold - Customs Clearance)	16	(atomic line)	Artig Sound Sergers"	DHLA - DHL Domestic Express	3	4.200kg	<u>6743043440</u>	16		V
> Manifest History	_Z)HL_	19 Feb 2019	Test (OnHold - Customs Clearance)	ß	2 diseast, Sough,	Lo Thig Links of Hergoland 🕷	DHLA - DHL Domestic Express	3	4.200kg	<u>6743043521</u> <b>%</b>	16		
REPORTING	_Z)HL_	19 Feb 2019	Test (OnHold - Customs Clearance)	IC.	EAvent, Ungh.	ta 119 Antara Segulara	DHLA - DHL Domestic Express	3	4.200kg	<u>6743043543</u> <b>%</b>	16		
QUOTATION	_DHL_	19 Feb 2019	Test (OnHold - Customs Clearance)	ß	Laboraud, Simuph.	St. 1983 United Strengthers 🖬	DHLA - DHL Domestic Express	3	4.200kg	<u>6743043602</u> <b>%</b>	В		
	_DHL_	19 Feb 2019	Test (OnHold - Customs Clearance)	10	Estimate Sough.	N 121 CARD HUNDER	DHLA - DHL Domestic Express	3	4.200kg	<u>6743043661</u> •	ю		

Figure 22: Confirmation Required to Release Shipments

- 5. Click "Yes" to release the shipments that are selected. If you click "No" the confirmation message will be dismissed and shipments will not be released from hold.
- You can also release the shipment by viewing a shipment in detail as described in <u>Section 6</u>. To release a shipment, first click the release button in the view shipment detail screen. A "confirmation required" message will be displayed. When the "Yes" button is selected, the shipment will be released from hold.

	iipinen	
8457018430		×
Dashboard / Shipment Search / Shipment	<b>Confirmation Required</b>	^
Shipment Information On Hold - Awaiting Part	Are you sure you want to Release this shipment?	
Intersoft_Test Blays House Englefield Green	YES No	1 <b>30 🗈 <u>5289</u>.</b> 2000003986412
Wick Road	Reference	1234567
Egham Surrey TW20 0HJ	Shipping Date	19 Mar 2019
laura.lyonette@intersoft.co.uk	Expected Delivery Date	22 Mar 2019
01784777170	Agent	DHL (Express)
	Service	DHLA - DHL Domestic Express
⊘ Cancel ► Release	Status	Client Unprocessed - Scanned

Figure 23: Release Hold Shipment via View Shipment Detail



7. A confirmation message will be displayed in the top right corner of the screen. The text of the "Release" button will be changed back to "Hold". The shipment will now be taken off from hold and will be included in the shipment close out process so that it can be manifested and shipped. If clean sweep is configured in the system, then the shipment will be included in the automatic close out.

Shipment Information			<ul> <li>The shipment has been successfully reinstated</li> </ul>
ntersoft_Test	Tracking Number	<b>8457018430 🚯 <u>сору</u></b>	
Blays House	UNI	JJD011000000003986412	
inglefield Green Wick Road Egnam Surrey TW20 OHJ	Reference	1234567	
₩ UNITED KINGDOM	Shipping Date	19 Mar 2019	
aura.lyonete@intersoft.co.uk	Expected Delivery Date	22 Mar 2019	
una.ryonetteejinterson.co.uk	Agent	DHL (Express)	
11784777170	Service	DHLA - DHL Domestic Express	
Cancel     Hold	Status	Client Unprocessed - Scanned	

#### Figure 24: Reinstate of Hold Shipment

8. The "Shipment Date" of the released shipment will now be updated to the date of release.

ITERSOFT	Ship	ment P	rocessing	- Vi	ew Shipments						
DASHBOARD	Dashboard /	Shipment Processing	/ Shipments							< 1	Back
SHIPMENT SEARCH	Tracking Nur	mber, Reference,	Postcode	Q	Today	Id Shipments ncelled Shipments			Hold Shipment	s Cancel Shipn	nents
SHIPMENT PROCESSING	63 Shipments									1 2 3	4
> Booking Wizard > Bulk Mailing		11 Shipment Date	Shipper Reference		Destination	Service	Packages	Weight	Tracking Number	↓F Last Modified	
> Scanning	_DHL_	22 Mar 2019	DB070820180927	16	Repropris new selection characters, policy, instead laness of investing MI	DHLD - DHL Express Worldwide WPX	1	1.000kg	<u>6853379466</u>	33 Mar 2009 33.3805 Deeper Gentaries	0
TRACKING	-DHL_	22 Mar 2019	DB070820180927	В	Milliongali Panenaile (Trackins, 2940), Robel Raise of America	DHLD - DHL Express Worldwide WPX	1	1.000kg	8358518210	33 Mar 2019 TTSHO5 Liktha Ishonati	D
REPORTING	_DHL_	22 Mar 2019	DB070820180927	10	Hillingen Free antis, Dar Inten, 2003. Initial States of America 🖬	DHLD - DHL Express Worldwide WPX	3	5.000kg	6459942602	33 Mar 2009 BK3075y MT	D
MAINTENANCE	_DHL_	21 Mar 2019	VW-SR-13	16	Test Company, Slough, SL1 3PP, United Kingdom 🚟	DHLC - DHL Domestic Express 12PM	3	2.500kg	8088769920	S (11 Mar 2015) 16 27 hg Kharvel	D
QUOTATION	_DHL_	21 Mar 2019	VW-SR-12	16	Test Company, Slough, SL1 3PP, United Kingdom 🔜	DHLC - DHL Domestic Express 12PM	2	3.000kg	8088767481	ST Mar 2019 15:15/by Shahut	
	_DHL_	21 Mar 2019	VW-SR-12	10	Test Company, Slough, SL1 3PP, United Kingdom 🚟	DHLC - DHL Domestic Express 12PM	2	3.350kg	8088767411	S 31 Mar 2019 TRANSPORT	D

*Figure 25: Update of Shipment Date to Shipment Released Date* 

#### 8 Hold Shipment by Service

- 1. In addition to hold single or multiple shipments, this option allows you to hold all shipments of a carrier by service.
- 2. To select this option, you must click on "View Services" option of the respective carrier in the Shipment Processing screen.

INTELLIGENT SHIPPER =	SystemTest Environment -	State of the Owner
INTERSOFT	🤶 Shipment Processing	
DASHBOARD	Dashboard / Shipment Processing	<b>≮</b> Back
SHIPMENT SEARCH	Today	Booking Wizard Bulk Mailing IIII Scan Unprocessed Shipments
SHIPMENT PROCESSING	On Hold (106)	Qn Hold (5)
> Booking Wizard	Processed Shipments (128)	Unprocessed Shipments (37)
> Bulk Mailing	Last Updated 11 Mar 2019 15:09:05	Last Updated 11 Mar 2019 15:09:05
> Scanning		
> Manifest History	told all shipments + View Services	Hold all shipments + View Services
TRACKING	Shipment Count: 8 Total Weight: 3.452 KG	
REPORTING	View Shipments	Shipment Count: 13 Total Weight: 13.900 KG View Shipments
MAINTENANCE	FEDEX Hold all shipments + View Services	DHL (Express) Hold all shipments + View Services
QUOTATION	Shipment Count: 42 Total Weight: 121.600 Closeout View Shipments KG	Shipment Count: 3 Total Weight: 11.200 KG View Shipments

Figure 26: View Services Option of a Carrier to Hold Shipments

3. Click "Hold all shipments" link of the related carrier's service in the Shipment Processing screen.

INTELLIGENT SHIPPER	SystemTest Environment -	ALC: NOT THE OWNER OF THE OWNER OWNER OF THE OWNER
ITERSOFT	🚊 Shipment Processing	
DASHBOARD	Dashboard / Shipment Processing	< Back
SHIPMENT SEARCH	Today	Booking Wizard Bulk Mailing IIII Scan Unprocessed Shipments
SHIPMENT PROCESSING	On Hold (106)	On Hold (5)
> Booking Wizard	Processed Shipments (128)	Unprocessed Shipments (37)
> Bulk Mailing	Last Updated 11 Mar 2019 15:09:05	Last Updated 11 Mar 2019 15:09:05
> Scanning		
> Manifest History	dpd DPD Netherlands - Services -Hide Services	Hold all shipments + View Services
TRACKING	· · · · · · · · · · · · · · · · · · ·	
REPORTING	Service: 302 - IE2 - INTERNATIONAL EXPRESS Shipment Count: 3 Total Weight: 1.752 KG Wew Shipments Hold all shipments	Shipment Count: 13 Total Weight: 13.900 KG View Shipments
MAINTENANCE	Service: 328 - CL - PREDICT B2C DPD HOME Closeout	DHL (Express) Hold all shipments + View Services
QUOTATION	Shipment Count: 5 Total Weight: 1.700 KG View Shipments Hold all shipments	Shipment Count: 3 Total Weight: 11.200 KG
	Hold all chinmante	View Shipments

Figure 27: Hold All Shipments in the Carrier's Service



- 4. A message will be displayed asking for a hold reason to be selected.
- 5. Select the reason for hold from the drop-down menu and click the "Yes" button. If you click the "No" button the "Confirmation Required" message will be dismissed.

INTELLIGENT SHIPPER	SystemTest Environment - Version	
INTERSOFT	🚊 Shipment Processing	
DASHBOARD	Dashboard / Shipment Processing	K Back
SHIPMENT SEARCH	Today Confirmation Requi	ng Wizard Bulk Mailing IIII Scan Unprocessed Shipments
SHIPMENT PROCESSING	Held shipments will not be included in any manifest / shipments.	On Hold (5)
> Booking Wizard	Processed Shipments Reason for Hold Customs Clearance	, hipments (37)
> Bulk Mailing	Last Updated 11 Mar 2019 14:41	2019 14:41:12
> Scanning	Are you sure you want to hold the selected	i shipments?
> Manifest History	DPD YES No	Hold all shipments + View Services
TRACKING		
REPORTING	Shipment Count: 2 Total Weight: 60.450 KG Closeout	Shipment Count: 13 Total Weight: 13.900 KG View Shipments
MAINTENANCE	Generation Hold all shipments + View Services	DHL (Express) Hold all shipments + View Services
QUOTATION	Shipment Count: 2 Total Weight: 130.000 KG Closeout View Shipments	Shipment Count: 3 Total Weight: 11.200 KG View Shipments

Figure 28: Confirmation Required Message

6. Once you have confirmed "Yes", a successful shipment hold message will be displayed.

INTELLIGENT SHIPPER	SystemTest Environment - Version	
ITERSOFT	1 Shipment Processing	
DASHBOARD	Dashboard / Shipment Processing Confirm your Printer Pr	ofile KBack
SHIPMENT SEARCH	Today	ng Wizard Bulk Mailing IIII Scan Unprocessed Shipments
SHIPMENT PROCESSING	Prompt Me When Printing	
> Booking Wizard	Processed Shipments	hipments (37)
> Bulk Mailing	Last Updated 11 Mar 2019 14:58 Confirm your Print Profile	2019 14:58:44
> Scanning		
> Manifest History	tiold all shipments + View Services	Hold all shipments + View Services
TRACKING	Shipment Count: 8 Total Weight: 3.452 KG	
REPORTING	View Shipments	Shipment Count: 13 Total Weight: 13.900 KG View Shipments
MAINTENANCE	FEDEX Hold all shipments + View Services	DHL (Express) Hold all shipments + View Services
QUOTATION	Shipment Count: 42 Total Weight: 121.600 KG	Shipment Count: 3 Total Weight: 11.200 KG View Shipments

Figure 29: Successful Hold confirmation Message

### 9 Hold All Shipments of a Carrier

In addition to other hold options, this option allows to hold all shipments of a carrier.

- 1. To hold all shipments of a carrier, you must first locate the shipments via the Shipment Processing screen.
- 2. Once you have found the shipments in the shipment processing screen, choose the carrier of the shipment that you want to put on hold.
- 3. Click the "Hold all shipments" link of the corresponding service in the shipment processing screen.

INTELLIGENT SHIPPER 🗮	SystemTest Environment - Version	A CONTRACTOR AND A CONTRACT AND
INTERSOFT	🚊 Shipment Processing	
DASHBOARD	Dashboard / Shipment Processing	< Back
SHIPMENT SEARCH	Today	Booking Wizard Bulk Mailing
SHIPMENT PROCESSING	Processed Shipments (129)	Unprocessed Shipments (37)
> Booking Wizard	ribeessed shipments (125)	onprocessed shipments (57)
> Bulk Mailing	Last Updated 11 Mar 2019 14:41:12	Last Updated 11 Mar 2019 14:41:12
> Scanning		
> Manifest History	DPD Hold all shipments + View Services	Royal Mail  Royal Mail
REPORTING	Shipment Count: 2 Total Weight: 60.450 KG Closeout	Shipment Count: 13 Total Weight: 13.900 KG
MAINTENANCE	Grand DPD Local Hold all shipments + View Services	DHL (Express) Hold all shipments + View Services
QUOTATION	Shipment Count: 2 Total Weight: 130,000 Closeout View Shipments KG	Shipment Count: 3 Total Weight: 11.200 KG View Shipments

Figure 30: Hold All Shipments

- 4. A message will be displayed asking for a hold reason to be selected.
- 5. Select the reason for hold from the drop-down menu and click the "Yes" button. If you click the "No" button the "Confirmation Required" message will be dismissed.

#### Hold Shipments Manual

INTELLIGENT SHIPPER =	SystemTest Environment - Version	
INTERSOFT	🚊 Shipment Processing	
DASHBOARD	Dashboard / Shipment Processing	× Back
SHIPMENT SEARCH	Today Confirmation Requi	ing Wizard Bulk Mailing IIII Scan Unprocessed Shipments
SHIPMENT PROCESSING	Held shipments will not be included in any manifest shipments.	Cn Hold (5)
> Booking Wizard	Processed Shipments Reason for Hold - Please select reas	hinments (37)
> Bulk Mailing	Last Updated 11 Mar 2019 14:41 Are you sure you want to hold the selecte	2019 14:41:12 ed shipments?
> Scanning		
> Manifest History	DPD YES No	Hold all shipments + View Services
TRACKING	Shipment Count: 2 Total Weight: 60:450 KG	
REPORTING	Shipment Count: 2 Total Weight: 60.450 Kg Closeout	Shipment Count: 13 Total Weight: 13.900 KG View Shipments
MAINTENANCE	Hold all shipments + View Services	
QUOTATION	Image: Services         Image: Services	DHL (Express) Hold all shipments + View Services
	Shipment Count: 2 Total Weight: 130.000 KG Closeout.	Shipment Count: 3 Total Weight: 11.200 KG View Shipments

**INTERSOFT** 

Figure 31: Confirmation Required Screen to Select Reason

6. Once the reason for hold is selected, click the "Yes" button to put the shipment on hold. If you click the "No" button the message will be dismissed.

INTELLIGENT SHIPPER	SystemTest Environment - Version	
INTERSOFT	🚊 Shipment Processing	
DASHBOARD	Dashboard / Shipment Processing	K Back
SHIPMENT SEARCH	Today Confirmation Requ	ired ing Wizard Bulk Mailing IIII Scan Unprocessed Shipments
SHIPMENT PROCESSING	Held shipments will not be included in any manifest shipments.	/ closeout of On Hold (5)
> Booking Wizard	Processed Shipments Reason for Hold Customs Clearance	hinments (37)
> Bulk Mailing	Last Updated 11 Mar 2019 14:41 Are you sure you want to hold the selecte	2019 14:41:12
> Scanning	Are you sure you want to hold the selecte	ed snipments?
> Manifest History	DPD YES No	ail Hold all shipments + View Services
TRACKING	· · · · · · · · · · · · · · · · · · ·	
REPORTING	Shipment Count: 2 Total Weight: 60.450 KG Closeout:	Shipment Count: 13 Total Weight: 13.900 KG View Shipments
MAINTENANCE	dod DPD Local Hold all shipments + View Services	DHL (Express) Hold all shipments + View Services
QUOTATION	or dpd DPD Local	DHL (Express) Hold all shipments + View Services
	Shipment Count: 2 Total Weight: 130.000 KG Closeout	Shipment Count: 3 Total Weight: 11.200 KG View Shipments

Figure 32: Confirmation Required Screen with Reason



7. A successful message "Shipments have been successfully put on hold" will be displayed.

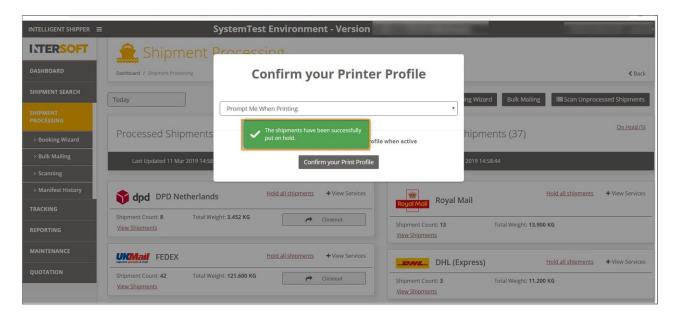


Figure 33: Successful Message for Shipments on Hold

# 10 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.	