

Intelligent Shipper

Manifest and Close Out User Guide Version 3.0

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Description	This guide is to help users through the Manifest & Close Out process within the Intelligent Shipper system.
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1. Document Controls

Version History

Version	Amendments	Date	Author
1.0	Final version	16/03/2018	Anna Diaz
1.1	Added section 4.1 View Shipments Ready for Manifest and Closeout.	20/07/18	Laura Lyonette
2.0	Changed example manifest in section 4.2. Added FAQs in Appendix.	01/08/2018	Laura Lyonette
2.1	Removed references to 'Print Label' button as this has been removed from the system.	09/07/2019	Shayne Cabral
2.2	Updated following review feedback	11/07/2019	Shayne Cabral
3.0	Final version for release	22/07/2019	Laura Lyonette

Review

Name	Title	Date Reviewed	Version Reviewed
Steve Sneath	Retail Solutions Consultant	31/07/18	1.1
Laura Lyonette	Senior Business Analyst Team Lead	09/07/2019	2.1
Weronika Kucharska	Customer Success Executive	11/07/2019	2.1
Weronika Kucharska	Customer Success Executive	22/07/2019	2.2

Referenced Documents

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

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3. Introduction

Once a label has been created for the shipment it will then be available to manifest and close out via the Shipment Processing screens. Manifesting a shipment produces the relevant paperwork and documentation required by the carrier for them to accept and transport your shipments. Closeout sends the electronic data (pre-advice files etc.) required by the carrier for the shipment, so that the carrier can operationally handle the items effectively.

NOTE: Shipments can also be closed out via API, for more information please view the API spec guide.

4. Manifest & Closeout Shipments

4.1. View Shipments Ready for Manifest and Closeout

- To view the shipments ready for manifest and closeout, select the “Shipment Processing” menu option. This will display a list of all shipments that have been processed and are ready to closeout, listed by carrier.

The screenshot shows the 'Shipment Processing' dashboard. At the top, there is a breadcrumb trail: 'Dashboard / Shipment Processing'. Below this is a date filter set to 'Today'. The main section is titled 'Processed Shipments (8532)' with a link for 'On Hold (60)'. A status bar indicates 'Last Updated 09 Jul 2019 13:36:38'. The dashboard lists three carriers:

Carrier	Shipment Count	Total Weight	Actions
DHL (Express)	16	25.500 KG	Hold all shipments, View Services, Closeout
DPD	2	6.000 KG	Hold all shipments, View Services, Closeout
dpd DPD Netherlands	4	0.400 KG	Hold all shipments, View Services, Closeout

Figure 1 - Processed Shipments Ready for Manifest and Closeout

2. Click the “View Services” link to see a list of the services for that Carrier that have shipments pending Manifest and Closeout.

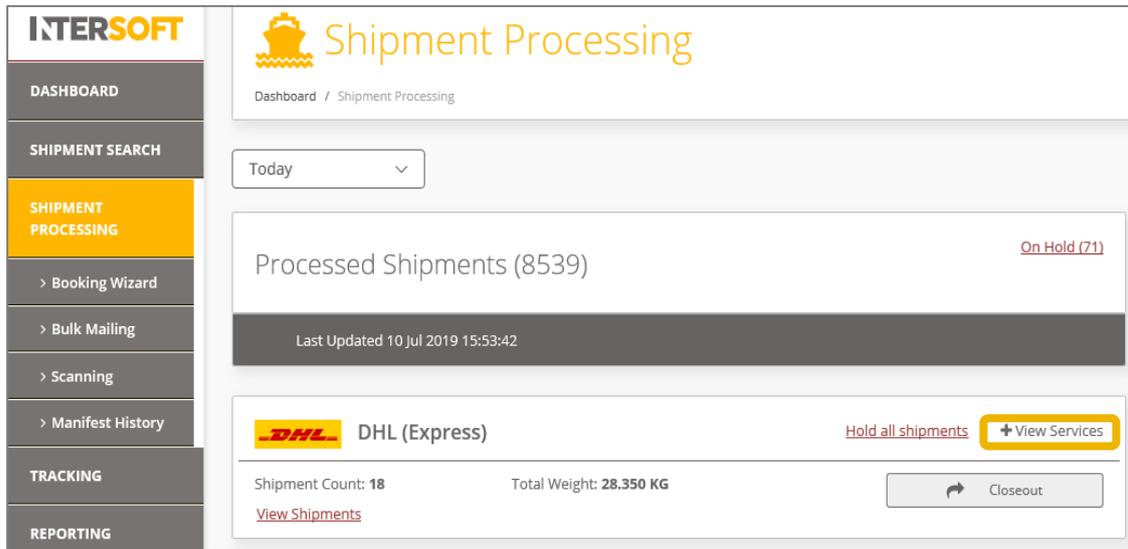


Figure 2 – View Services

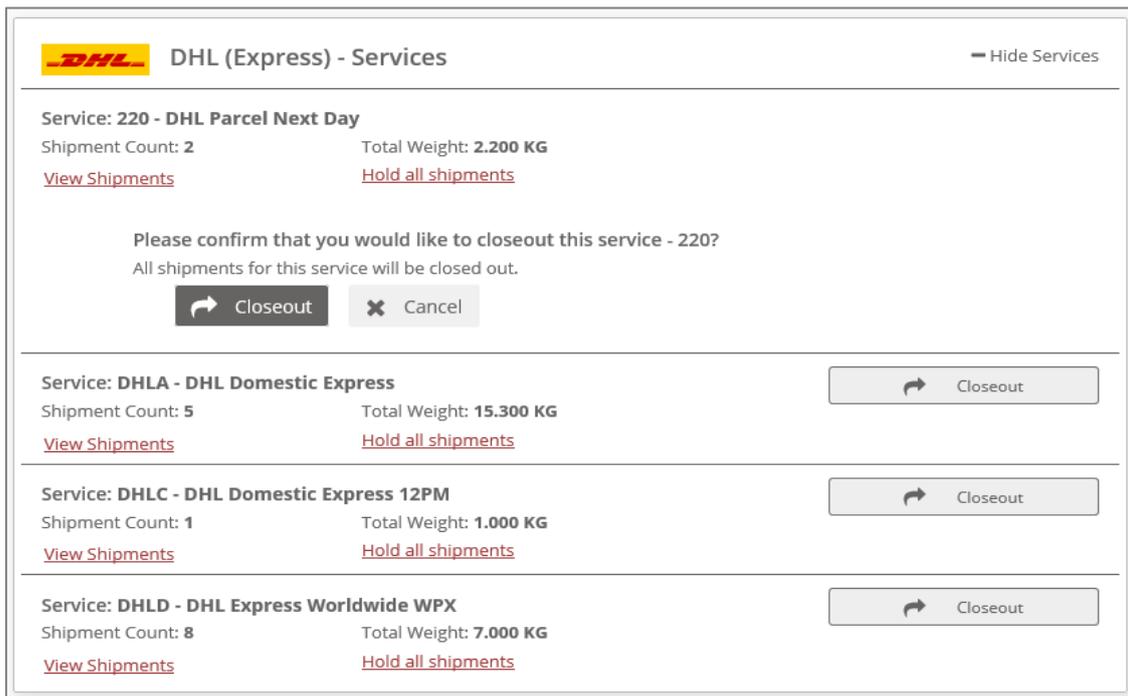


Figure 3- Services List Expanded

3. Depending on your system setup, Royal Mail shipments ready for closeout can be listed in two different ways:
 - a) Royal Mail is listed once, and when expanded all Royal Mail services will be listed, including tracked high volume services.

Royal Mail - Services
Hide Services

Service: PS9 - BUSINESS PARCELS MAX SORT PRIORITY

Shipment Count: 1 Total Weight: **0.200 KG**

[View Shipments](#) [Hold all shipments](#)

Closeout

Service: TPMN - Tracked 24 High Volume No Signature

Shipment Count: **8477** Total Weight: **8053.150 KG**

[View Shipments](#) [Hold all shipments](#)

Closeout

Figure 4 - Royal Mail – all services listed together

b) Royal Mail tracked high volume services are listed separately to standard services, under the following carrier codes:

- RYHV – Royal Mail high volume services only.
- RYML – all other Royal Mail services.

RYHV - Royal Mail - Services

Hide Services

Service: TPLS - Tracked 48 High Volume Signature

Shipment Count: 1 Total Weight: **1.000 KG**

[View Shipments](#)

Closeout

Service: TPMN - Tracked 24 High Volume No Signature

Shipment Count: 1 Total Weight: **1.800 KG**

[View Shipments](#)

Closeout

RYML - Royal Mail - Services

Hide Services

Service: TP55 - Tracked 48 Signature

Shipment Count: 1 Total Weight: **1.200 KG**

[View Shipments](#)

Closeout

Figure 5 – Royal Mail – tracked high volume services listed separately to standard services

4.2. Closeout

1. To closeout all shipments for a carrier (across all services), select the “Closeout” button for that Carrier.

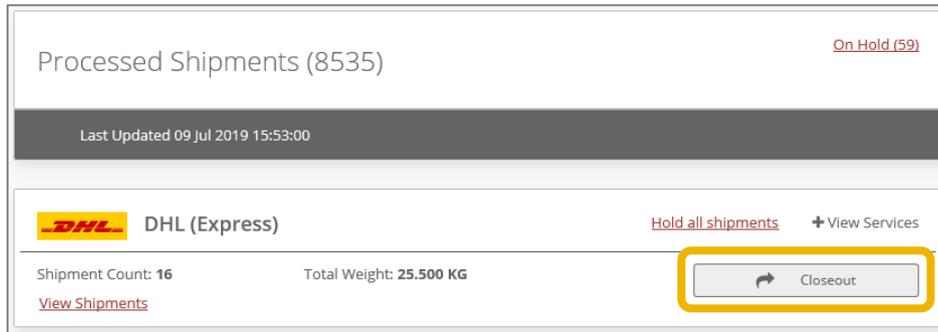


Figure 6 - Closeout by Carrier

2. If you want to close out by service rather than close out all shipments for a carrier, click “View Services” and select the “Closeout” button for the required service.

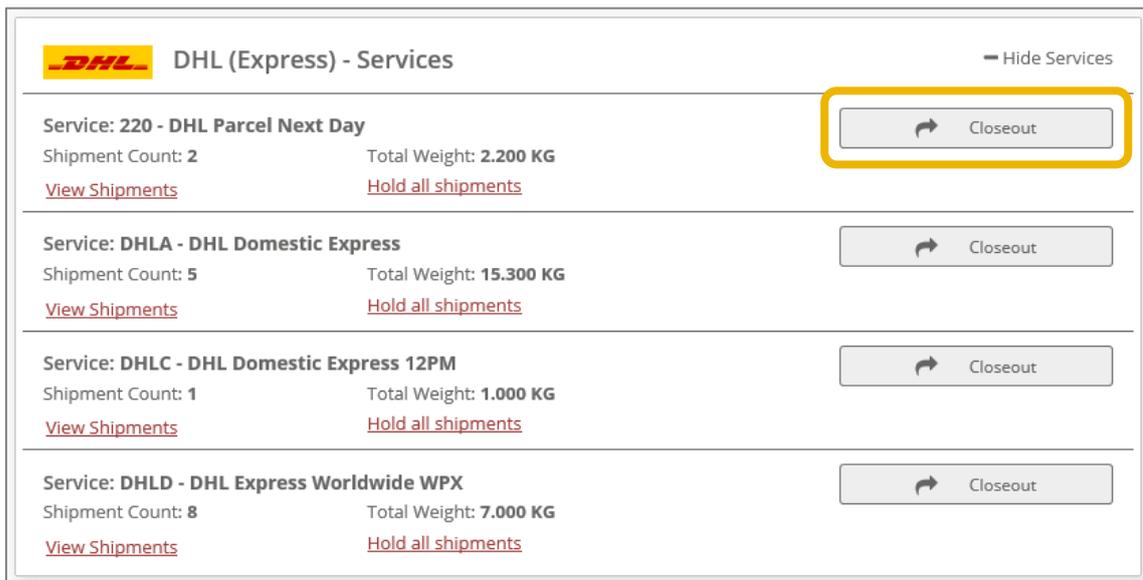


Figure 7 - Closeout by Service

- You will then be prompted to confirm that you want to proceed with closeout for the selected Carrier or service. Select the “Closeout” button to complete the process. Any electronic pre-advise or manifests needed for the shipment will be generated and sent to the Carrier.

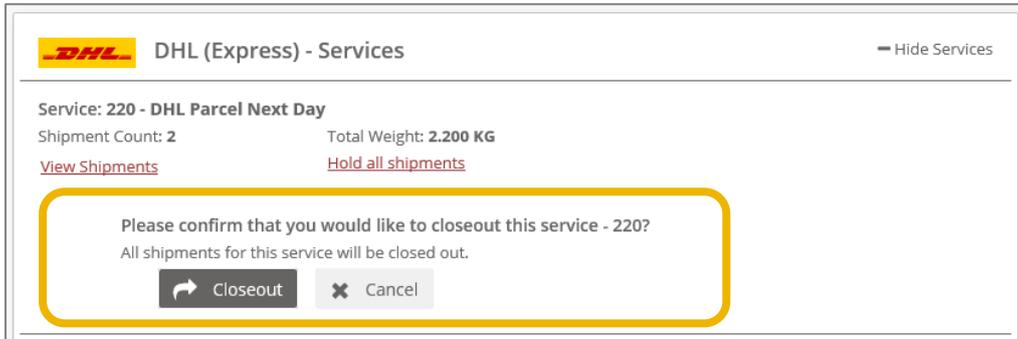


Figure 8- Confirm Closeout

- Once you select the “Closeout” button, a Manifest file will be automatically downloaded.



Figure 9 - Example Manifest File

5. Appendix – Frequently Asked Questions (FAQs)

The table below contains responses to some questions that users frequently ask relating to Manifest and Closeout of shipments.

Category	Question	Answer
Manifest shipment	I've gone to the Shipment Processing screen to manifest my shipment, but it isn't listed. Why is this?	If a processed shipment that you hadn't closed out is no longer showing in the Shipment Processing screen, then it will have been closed out via clean sweep. Clean sweep is a process that can be set to run on set days and times to automatically close out shipments. If clean sweeps have been setup in the system and you not have not closed out any shipments on a day when clean sweep is set to run, then the clean sweep will run at the set time and automatically close out all processed shipment.
Manifest shipment	My shipment has been closed out via clean sweep; how can I print the manifest?	There are 2 ways you can find and print the manifest for shipments closed out via clean sweep: <ol style="list-style-type: none"> 1. Search for the manifest in the Manifest History screen, open and print the manifest. 2. Search for the shipment in the Shipment Search screen, view the shipment then open and print the manifest.