

# Intelligent Shipper

## Routing Options – Service and Agent Selection Manual Version 1.0

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Description	Explains how routing options setup by Admin users will be used to determine the service and agent for a shipment.
Author	Laura Lyonette

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## 1. Document Controls

### Version History

Version	Amendments	Date	Author
0.1	First draft	20/08/2018	Laura Lyonette
0.2	Updated following feedback	22/08/18	Laura Lyonette
1.0	Final version for review	23/08/18	Laura Lyonette

### Review

Name	Title	Date Reviewed	Version Reviewed
Praveena Ramanujam	Test Analyst	21/08/18	0.1
James Thomas	Managing Director	23/08/18	0.2

### Referenced Documents

Document Name	Version	Location (e.g. Link to Shared Drive, SharePoint etc.)
Configure Routing Options Manual	1.0	Online help centre

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### 3. Introduction

Intelligent Shipper provides the ability to configure flexible routing options by allowing Admin level users to set the system to switch to a different service or agent in certain scenarios. The purpose of this manual is to inform Customer and Admin users how Intelligent Shipper will use these routing options to select a service and an agent for the shipment, to help users understand the routing selected for shipments. For instructions on how Admin users can setup these routing options in the system see the Configure Routing Options Manual.

### 4. Determine Shipment Service

Intelligent Shipper allows Admin level users to set service switches for a service based on weight, value and dimensions thresholds. If the service is selected for a shipment and the shipment exceeds these service switch thresholds, then the service set in the service switch will be used for the shipment, instead of the service the customer selected.

When service switches are setup a priority order must be set, so that if multiple service switches are setup for a service and more than one service switch is triggered by a shipment then the system knows which service switch to use.

The following flow diagram shows the process Intelligent Shipper will follow to determine the service for a shipment:

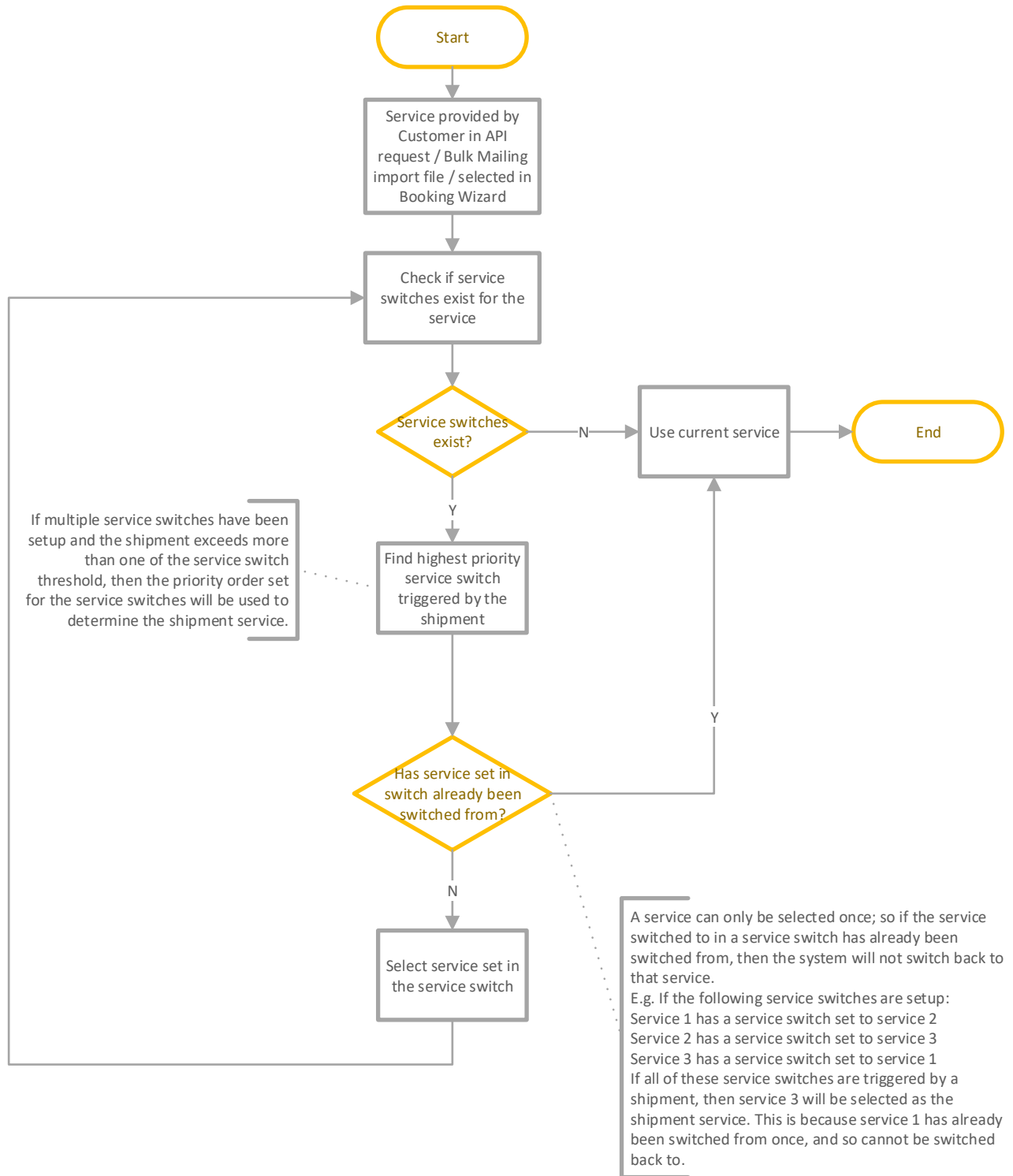


Figure 1 - Determine Shipment Service Flow Diagram

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## 5. Determine Shipment Agent

Once the shipment service has been selected, Intelligent Shipper will then determine the agent that will be used to deliver the shipment. There are several areas in the system where Admin users can set a default agent. When a shipment is created the system will check the shipment details against this setup and the routing logic to determine the shipment agent.

As well as setting default agents, Intelligent Shipper also allows Admin level users to set agent overrides on some routing options based on weight, value and dimensions limits. When these limits are exceeded and either the label or type or service code of the agent set in the override matches that of the default agent, the system will select the agent set in the override instead of the default agent. These agent overrides can be set on the following areas:

- Routing exceptions – exceptions to the standard logic for selecting shipment agent set on a combination of country, town and post code. For example, if you want to use a different agent to ship to a remote town as the agent(s) you would usually use do not deliver there or have a longer delivery time, you can use a routing exception to do this.
- Service destinations - configure settings for each destination (either a country or routing exception) that a service is available to.
- Customer routing overrides – customer-specific routing exceptions that can be setup for a specific service all for all services.

When agent overrides are setup a priority order must be set, so that if multiple agent overrides are setup and a shipment triggers more than one of these then the system knows which agent override to use to use. E.g. If a routing exception has agent overrides set on weight and value and the shipment exceeds both thresholds.

The following flow diagram shows the process Intelligent Shipper will follow to determine the agent for a shipment:

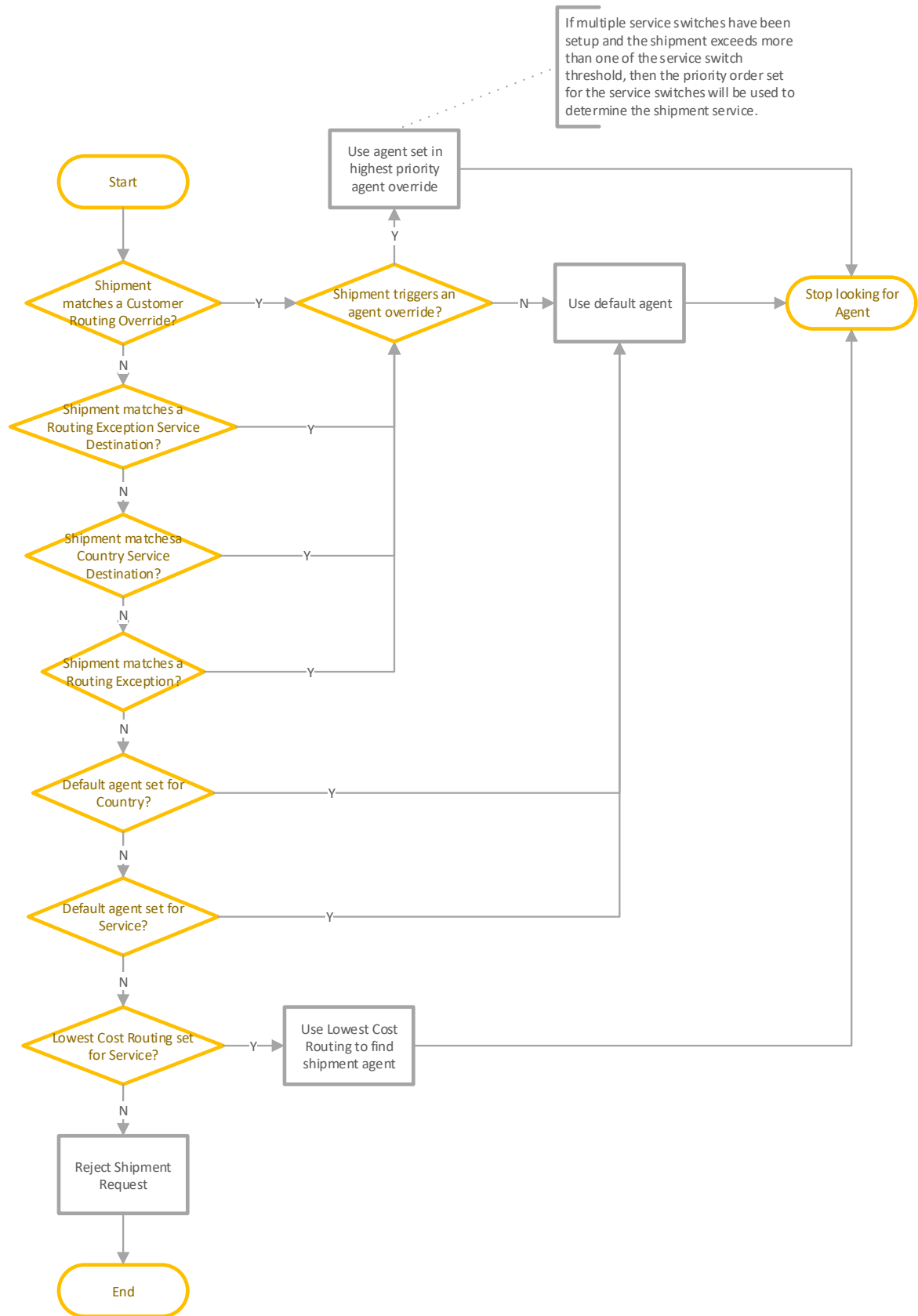


Figure 2 - Determine Shipment Agent Flow Diagram



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## 5.1. Matching Customer Routing Overrides to Shipments

When determining the shipment agent, the system will check the shipment for matches to Customer Routing Overrides in the following order:

1. Service, Country, Town and Postcode match
2. Service, Country, Town and partial Postcode match
3. Service, Country and Postcode match (no town)
4. Service, Country and partial Postcode match
5. Service, Country and Town match (no postcode)
6. Service and Country (no postcode and no town)
7. All Services, Country, Town and Postcode match
8. All Services, Country, Town and partial Postcode match
9. All Services, Country and Postcode match (no town)
10. All Services, Country and partial Postcode match
11. All Services, Country and Town match (no postcode)
12. All Services and Country (no postcode and no town)

## 5.2. Matching Routing Exceptions to Shipments

When determining the shipment agent, the system will check the shipment for matches to Routing Exceptions in the following order:

1. Country, Town and Postcode match
2. Country, Town and partial Postcode match
3. Country and Postcode match (no town)
4. Country and partial Postcode match
5. Country and Town match (no postcode)