

## Intelligent Shipper Shipment Closeout Quick Reference Guide

### What is Shipment Closeout?

Before shipments are handed over to the carrier they must be closed out in Intelligent Shipper. Closing out produces the collection manifest to be handed over the driver and may trigger electronic pre-advance data and any relevant billing data to be sent to the carrier. Closeout also prevents the shipment from being edited or cancelled, so that the shipment cannot be changed after it has been handed over to the carrier.

Shipments must be closed out a minimum of once a day normally in line with the final collection of the day, but can be closed out more frequently if needed e.g. If a carrier makes several collections per day.

**Note:** Any shipments that are cancelled, on hold, in an unprocessed state or have a future shipping date will not be closed out when the closeout process is run.

### Methods of Closeout

Shipments can be closed out via either the confirmShipment API or the Shipment Processing screen in the GUI.

There are 3 possible ways to closeout shipments, with the recommended options shown in bold:

1. **Closeout by agent (carrier)** – closes out all unmanifested shipments for the selected agent, across all services for that agent
2. **Closeout by service** – closes out all unmanifested shipments for a single service
3. Closeout by tracking number - available via API only. Closes out batches of individual shipments by providing the tracking numbers

**Intersoft recommends closing out by either agent or service.** This closes out multiple shipments at once, making the process more efficient. This is also the recommended approach to ensure you receive volume related discounts from Royal Mail (where applicable); if closing out by tracking number there is a risk these discounts may not be met.

If you do close out shipments by tracking number, the tracking numbers must be batched so that one API request contains multiple tracking numbers (rather than a separate request sent per tracking number) to maintain optimal performance of the API. A maximum of 250 tracking numbers can be sent in a single request.

### Importance of Shipment Closeout

All shipments must be closed out in Intelligent Shipper at least once per day; either via API or via the GUI. Any pending shipments not being sent out that day must be either cancelled or put on hold prior to closeout to exclude them from the closeout process.

When shipments are closed out, Intelligent Shipper will produce the collection manifest to hand over to the driver and will send electronic pre-advance data and any associated billing data to the carrier where required. Therefore, if shipments are not closed out, the collection manifest will not be generated. Royal Mail legally should not collect or transport shipments without the associated paperwork, and this may cause issues with other carriers too.

Where pre-advance data is required and not received, the carrier may potentially delay, withhold or surcharge shipments. Any service enhancements used for the shipment such as SMS or Email notifications may not be triggered. This is particularly important if using Royal Mail's local collect service, as the receiver will not be notified the item is awaiting collection.