Despatch Manager Online
Shipper User Training Guide

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Version 2.0
Part 2
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Archived Shipments

From the Archive main menu option, highlight and click on ‘Archived Shipments’.

Archived Shipments can be found using the search criteria fields above the shipment tab. The criteria can act as a filter showing only specific shipments that want to be searched for. There are three search categories available:

- Three levels of search criteria using specified data fields
- A sort facility to put the shipments in ascending or descending order
- A date range facility

Make sure you select ‘Show Shipments for All Users’ to ensure you include shipments which may have been created by any sub users that you may have.
The results in the archive can be exported as a CSV. No enhancements data such as email address or phone numbers will be exported.

There is also a link to the Royal Mail Track & Trace System for shipment tracking. If the item has not yet been scanned in by Royal Mail it will return a “Sorry - Please try again later”.

NOTE: Pending shipments that have been deleted will not be visible as an archived shipment.
Addresses

Users have the option to Manage, Import and Export Addresses.

Manage Addresses

Searching the Address Book:
- The address book window has a menu of options to search for the required address book entry (see above). Enter the criteria data and click the search button.
- The results will be displayed within the screen above. If more than one page exists for your results, click on the ‘Next’ (>>) link on the bottom right hand side of the screen to move to the next page.
- To select the address and use it in the shipment entry screen, press the button ‘Ship to this address’.
- The default view option upon first arrival in this screen is all addresses in the address book on the left.
Enter a New Address in the Address Book:
- To enter a new address into the address book:
  - Click on the 'Create' button
  - Populate the fields with the new address (Note: a unique address code must be used)
  - Click on the 'Save' button
  - The address will now be in the address book

Update an Address in the Address Book:
- To modify / update an address in the address book:
  - Search for the address that requires modification; populate the address fields with needed amendments.
  - Make the modification to the address
  - Click on the 'Save' button
  - The modifications will now have been saved

Ship to this address option:
There is an option from this screen called ‘Ship to this address’. This will put an address directly into the shipment entry screen.
Import Addresses

On the main menu options, click ‘Addresses’ and ‘Import’ as shown below. DMO can upload addresses directly into the address book on the server through the browser. This means that at any time a new address book can be loaded, modified, replaced or deleted.

There are four options on the IMPORT menu option:

- ‘Select the address book format’.
- ‘Select the address book file’
- ‘Select the default country’.
- Finally, choose the import file method.

There are 3 formats already created which customers can use, however if none of them are relevant for the address file then a bespoke format can be created.

1. Click on ‘New’
2. Select ‘Fixed width fields’ or ‘Delimiter-separated values’. Most address files will be CSV or TXT therefore will require the ‘Delimiter-separated values’ option to be used.
3. The below screenshot shows the ‘Delimiter-separated value option’. Most address files will use the Separators and Delimeters which are already set. You will then need to select the fields in the same order as they appear in your address file.

4. In step 3, you will need to name the layout and save it. Once saved, the new import layout is ready to use.

**Importing Address Book Files**

1. Select the data import file in section 2
Make sure that the required file import specification is selected – then type the path of the address book or click on the browse button. Clicking on the browse button will open the above window. From this screen find and select the correct path of the file to be imported and click on [Open] button to store the file in memory.

2. Ensure the default country is set to the United Kingdom in section 3
3. Choose the import file method in section 4

Once all four sections are complete click the [Import] button to upload the address book onto the server.

**Exporting Address Book Files**

On the main menu options, click ‘Addresses’ and ‘Export Addresses (txt)’. Click ‘Save’ and specify the folder location to export the file to.
Process Mailshots

To view the Process Mailshots screen click on the main menu ‘Addresses’ and ‘Process Mailshots’ as shown below.

Users can first choose a Mail Group Section and choose (1) to ‘Use the postcode in the batch to determine the correct post town’.

Users can choose to create their mailshot and process immediately in Section (2) without viewing their shipments or can create the mailshot and then view the shipments before processing.

Users can set their own Mailshot defaults in Section (3) and have a number of choices to map to their Mailshot Shipments.

Users can set their Service Options in Section (4). There they can set the department reference, state a reference number of their choice, select a shipping date, country and items/weight band for for their Mailshot Shipments.

The Process Mailshots functionality provides the ability to select a Mail Group to process mailshot shipments automatically, select the method of processing, choose mailshot default options and also choose the Service options for the Mailshot(s).
Mail Group Maintenance
To view Mail Group Maintenance click on the main menu ‘Addresses’ and ‘Mail Group Maintenance’ as shown below.

Users can Add, Delete and View a new Mail Group using the Mail Group Maintenance screen. The ‘Add’ button will add a new mail group name by entering the Mail Group Name into the field and then clicking on the Add button. Alternatively, a user can delete or view a Mail Group Address by clicking on the ‘Delete’ or ‘View’ buttons in section 1 of the Mail Group Maintenance screen.

Section 2 of the Mail Group Maintenance screen allows a user to assign multiple customer addresses from the address book to a Mail Group and then preview the results by clicking on
the ‘Preview’ button.

Shipper Admin

Manage Users & Create New Users (Shipper Accounts)
Each shipper will have an admin account, which can determine other sub-user accounts. To manage or create users on the main menu click on ‘Admin’ and ‘Users’ as shown below:

A list of users will appear on the right hand side, which can be amended by clicking on the desired user name. To create a new user, click on the button. The screen below will appear. Fill in the necessary information such as Business Name, Contact Name, Username and Password. Click on the button to finish the user set-up.
The newly created user David2 is now visible as shown below:

Security Rights
Set security rights depending on what you wish the user to access. If 'No' is selected for a particular user, the functionality selected will be hidden within their account.
User Security Rights

There are a host of security rights that can be switched on via the manage account for the sub users. A master user can switch on/off any of the following permissions.

- Manage Shipments
- Manage Address Book
- Resend/Reprint End of Day
- Account Admin
- Import Addresses
- EOD Process
- View Archived Shipments
- Reporting Tool
- Import Shipments
- On-Demand Shipping (If On Demand function has been enabled by Royal Mail for you)
- View Return to Sender Address
- View Service References
- View All Shipments for All Users
- View Business Response Addresses
- View Department References
My Profile

All users who have a valid account have the right to change their own profile information. A user can change their password as well as all fields shown on the Account Information page shown below (Business Name, Contact Name, Username and Password).

For a user to finalise amendments click the button to save any changes.

On Demand Settings show in here, as well as in 'On Demand Shipping' under the 'Shipping Services' tab.

The blank Commercial Invoice, CN22 and CN23 documents can be printed from here.
**Printer Settings**

To define printer settings click on the main menu ‘Admin’ and click on ‘Printer Settings’ as shown below. To make changes to printer settings a user must click the **Save Printer Settings** button to save changes.

Users have the option to define:

- **Printing format**: single or multi-label A4 sheet
- **Preview Option**: show or disable print preview option.
- **Immediate Printing**: enable or disable immediate printing
- **Label Printer**: Choose a default printer or specify another printer.

To enable Customs CN23 and Commercial Invoices to be printed on a separate A4 printer from the default label printer select the A4 printer to be used.

The default number of Customs CN22, CN23 and Commercial Invoices can be set here. Also if CN23 is always to be selected for non EU shipments.

Once a user has saved their printer settings, a user can check their Label Printer and A4 document settings.
Position Printing

There is functionality in DMO to print labels through an A4 printer. This is available through 'Enter a Shipment' and 'Batch Importing'.

1. Select 'Multi-Label A4 Sheet'

![Manage Printer Settings](image)

2. When a label is processed through DMO the below box will appear. This enables the shipper to decide where abouts they want the label to appear on the A4 paper. For batch importing the customer will be able to fix the position for all labels to enable batch printing.

![Label Positioning](image)

3. You will then be presented with the below window. This example shows that the customer has selected ‘1’ during step 2 to enable the label to appear in the top left hand corner.

![Example Label](image)
**System Requirements Check**

To run a system requirements check on your computer, click on the main menu ‘Admin’ and ‘System Requirements’ as shown below:

![System Requirements Check](image)

If a user upgrades software or DMO seems to be not working as expected, the first point of call is to run a System Requirements Check. This ensures the users PC is configured to run DMO.

To test DMO needed components click the **Recheck System Requirements** button. If a component is incorrect the traffic light will appear red. This test can also be completed from the main login screen.

It is recommended that the user upgrade any components that appear red as this can impact on the functionality.
**ISD Settings**

For Import Shipments or On Demand operation (using Importation of Shipping Data (ISD) format) click on the main menu ‘Admin’ and click on ‘ISD Settings’ as shown below. Define or view the ISD settings. This does not apply to manual entry shipments. For more details on ISD settings, refer to the Royal Mail DMO Import Shipments Set Up guide.
View Service References

To view the shipper location Service Reference(s), click on main menu ‘Admin’ and ‘View Service Reference’ shown below.

Each shipper location has the ability to view their Service Reference information. Select the Service Reference to display information. You will need to contact your Royal Mail account manager if you need to make a change.

![Despatch Manager Online]

- Select a service reference to view its details.
- View the details of the service reference.
- Contact your Royal Mail account manager if changes are needed.
Service Defaults

To view the Service Defaults click on the main menu ‘Admin’ and ‘Shipments Defaults’ shown below.

Users choose their service defaults within this screen. A user can select and save a default for the Service Type, Service, Service Format, Item Weight, the Default Number of Items for all shipments and also set a default against their account for the Department Reference. When the customer selects ‘Service Reference 1’ from the ‘Enter a Shipment’ screen, the defaults will then be produced. This will save the customer from having to select each field for their most popular service.
View Departmental References

Users can view the (optional) Departmental References associated with their account. Departmental References for their Account need to be first set up in Royal Mail's OBA system.

To view the Departmental Reference(s) click on main menu 'Admin' and 'View Departmental References' shown below.

A user can search the Departmental References using the 'Begins with' button or the 'Contains' buttons picklist (Department Name or Department Number); Then enter the search criteria by clicking the 'Search' button.
Return to Sender Address

Users can now view the Return to Sender address(s) associated to their account. A user can ‘Create’, ‘Delete’, ‘Purge’ and ‘Save’ the Return to Sender address(es).

To view the Return to Sender Address(s) click on main menu ‘Admin’ and ‘Return to Sender Address’ shown below.

A default ‘Return to Sender Address’ can also be selected from the selection of Return to Sender Addresses in this screen.

A user can also search the Return to Sender addresses using the ‘Begins with’ and ‘Contains’ buttons in this screen.
Business Response Address

Business Response address is used with Tracked Returns, to specify where these items are returned to. To view the Business Response Address(es) click on the main menu ‘Admin’ and ‘Business Response Address’ shown below. See the Appendix for details of how to save a Tracked Returns label to a file and then email it.

Users can view the Business Response Address(es) associated with their account.

A user can also search the Business Response addresses using the ‘Begins with’ and ‘Contains’ buttons and then entering search criteria into the ‘Search On’ field.

If an additional Business Response Address is needed contact 08457950950 or your Royal Mail Account handler to arrange to add the existing Tracked Returns service (Tracked Returns 24 and or 48) onto a new Service Reference Code, with the new Business Response Address.
Tariff Maintenance

Tariff codes are recommended by customs authorities to define the goods contained in the shipment against an international set of tariff codes – this helps them minimise the delay in processing the goods arriving at each country’s point of entry. See Appendix 3 for further information of how and why this is used. Access to the Tariff Maintenance is from the Admin drop down.

When the Tariff Maintenance option is selected the below screen will be shown on first usage:

```
Tariff Maintenance

<table>
<thead>
<tr>
<th>Contents Description</th>
<th>Tariff Code</th>
<th>Tariff Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Create | Delete | Purge |

Page 1 of 1 (0 Tariffs)
```

```
Despatch Manager Online

Tariff Maintenance

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Create | Delete | Purge |

Page 1 of 1 (0 Tariffs)
```
It is in the best interests of the shipper to accurately manage this table in order to avoid any obstruction at Customs. Royal Mail doesn’t validate this table, therefore the responsibility is with the customer.

The below screenshot shows you how Tariff Maintenance is transferred to the ‘Enter a Shipment’ screen in DMO.
If the Tariff Code and descriptions are not known, click on the Tariff code field highlighted below to hyperlink to the UK government Tariff website to assist with the selection of the appropriate tariff details to apply. This will then enable the customer to add the codes in the ‘Tariff Maintenance’ table.

![Tariff Code Hyperlink Icon]

This link will take you to the HMRC QbV UK website to search for import and export commodity codes and for tax, duty and licenses that apply to your goods.