

Despatch Manager Online

Shipper User Training Guide

February 2015

Version 2.0

Part 1

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Using the DMO Shipping System

Introduction

This document will give you a quick start guide to the main elements of Despatch Manager Online, from how to raise a shipment to the admin utilities that are available.

The aim of this document is to provide documentation to assist in shipper user training for sales and customer demonstration purposes.

There are separate documents available from Royal Mail for:

- DMO Shipping System Reporting Guide
- Inport Shipments Set Up Guide
- On Demand Set Up Guide
- Shipping API

Where to Start...

Log onto: https://app.rmdmo.royalmail.com

Enter your username. Enter your password.

Click on the Log in button to take you into the system



NOTE

- Usernames and Passwords are case sensitive and must include the following criteria:
- Password must contain at least 1 uppercase letter
- Password must contain at least 8 characters
- Password must contain at least 1 numeric number
- Password must contain at least one 'Special Character'
 -,!, @, #, \$, %, &, *
- Usernames must be longer than 8 characters

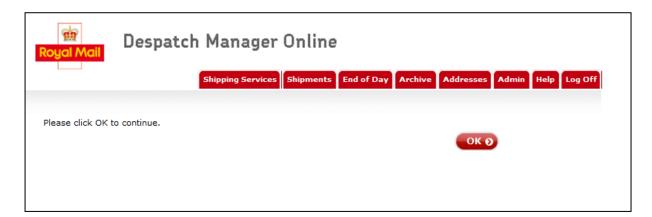
Note: There is a systems requirement check to make sure that your PC is up-to-date. This will instruct you as to the corrective action to take if the PC is found not to be ready to use.

- The green dot identifies that your PC software is good to use
- The amber dot means it can be used but is not the most appropriate software available.
- The red dot informs you that you may need to upgrade to make full use of DMO features.

The DMO shipping system is a web based application that uses an internet browser on a PC and therefore has no software loaded locally.

Welcome Page

Once you have logged into Despatch Manager Online (DMO) you may be presented with the 'Welcome Page' (image below). This page will display important message regarding the use of Despatch Manager Online, system maintenance, system changes and operational updates.



The Menus

A roll over menu allows you to browse the different screens of the application.



To access a screen, put your mouse over the menu title then click on the screen you want to access. This bar contains all the Despatch Manager Online (DMO) options.

Shipping Services: The shipping button contains the screen to raise new shipments, either through 'Enter a Shipment', 'Import Shipments' and 'On Demand Shipping'.

Shipments: The shipments button displays 3 tables. The first table contains the current shipments. These are shipments that will be manifested by the End-of-day process. Shipments can be viewed, cancelled, modified or searched for. The second table contains the pending shipments. These are shipments that have been raised in the shipment entry screen and merely saved to the system for later use (held here for 7 days). When shipments are saved from the shipment entry screen no labels are generated until the shipment is made live. Like above, shipments from this table can be viewed, cancelled, modified or searched for. The third table is 'non-processed imported shipments'. These are shipments that have been imported and are stored in DMO but have not yet been processed. Similar to the 'pending shipments'. (held here for 7 days)

EOD: The EOD button stands for END-OF-DAY process. From this menu option a Customer Collection Receipt can be printed and reprinted.

Archive: The archive contains all the shipments that have been successfully manifested. They will be held here for 13 months. From this screen shipments an be searched for and viewed on screen. Information from this table can be searched for through the criteria options and a filtered table presented on-screen. This data can be exported in a CSV file for reporting. The secondary option from this screen includes a direct link to the Royal Mail Tracking website.

Addresses: This button presents the address book maintenance screen for the shipping station. The main options of this screen include: Import and Export address books, add, remove, modify or delete address.

Admin: From the master shipper logon, additional sub users can be created. The super user determines the amount of access which is available for the sub user. Screens and menus can be locked from selection. The Admin tab also contains printer settings, service defaults, return to sender address, departmental reference and tariff maintenance.

Help: This menu options presents different help areas to provide assistance to users when using the DMO application.

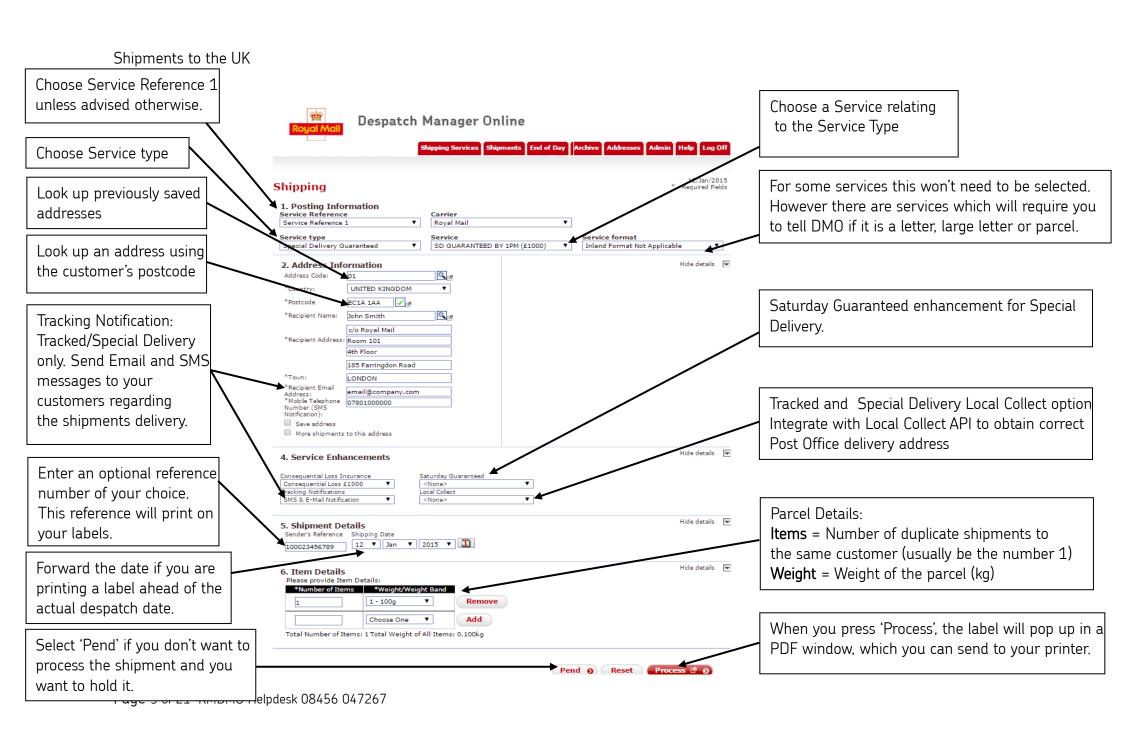
Log Off: Takes the user back to the username and password screen.

Enter a Shipment

The first screen that you see when you enter the system is the 'Shipping' screen. From this screen the following functionality is available: enter shipment details, process shipment and produce label.

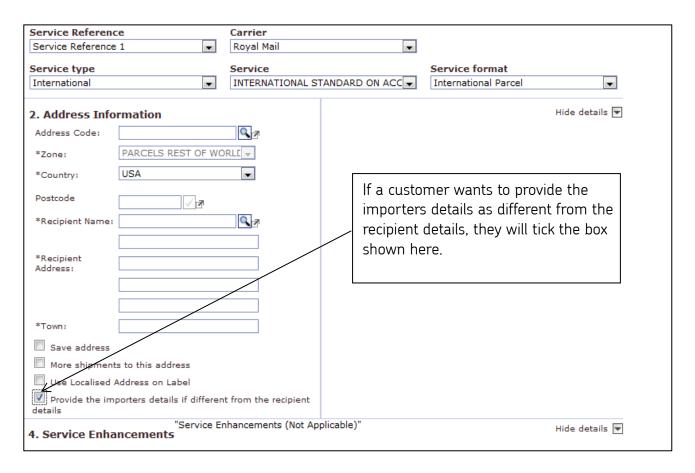
Some fields are populated by default (according to the Royal Mail specification – or if you have set the defaults yourself – see page 46) when loading the screen. Please check they match your selection for your shipment. (Service Reference, carrier, product)

On the next 2 pages are screenshots of the 'Enter a Shipment' screen for inland and international shipments.

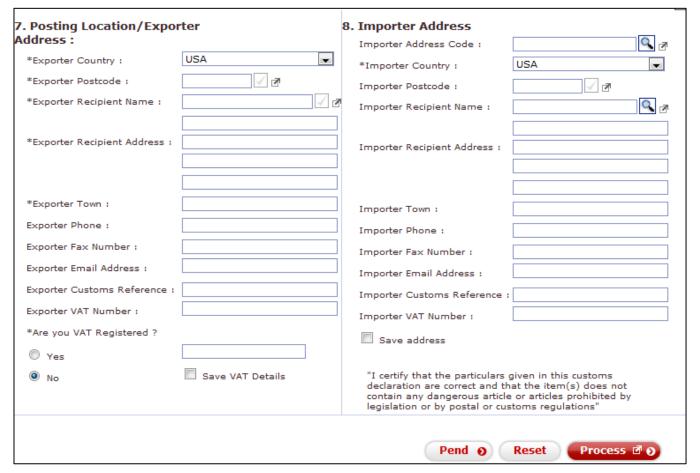


Shipments to an international address – including international documentation Despatch Manager Online If you tick this box, you will be given the Shipping Services | Shipments | End of Day | Archive | Addresses | Admin | Help | Log Of option to enter the address which includes the international characters. The Localised Shipping address will only be printed on the label. 1. Posting Information Carrier Royal Mail The UK equivalent is required for customs. Service type Service Purchase Order Reference. May be the International INTERNATIONAL ECONOMY ON ACC. ▼ International Letter 2. Address Information Hide details 🔻 3. Localised Label Address same as the Senders Reference 0 The fields below will allow special and foreign characters on the LETTERS REST OF WOR ▼ Used for the Commercial Invoice (CI). Choose from the list. Total parcel weight ROYALMAIL NON EU CA 33 AUGHTON POAD *Recipient Address *Recipient Address: 465436 SOUTHPORT The date that the shipper is going to Save address If not GBP a CN23 will ALWAYS be used as More shipments to this address invoice their customer Use Localised Address on Label Provide the importers details if different from the recipier can't calculate to see if CN22/CN23 Hide details nent Details This categorises the item type. Contents description - this would have 12 ▼ Jan ▼ 2015 ▼ Other → Retail is the most popular been set up in Tariff Maintenance rms of delivery Commercial Invoice Date screen DDU / Incoterm 20 letails 🔻 Either number of parcels OR 6. International Item Contents Tariff code/description will be auto number of individual items e.g. 10 populated based on what you have rulers selected under Contents Description Either overall weight or individual This is required for CN22/CN23 and Cl. weight e.g. weight of 10 rulers Royal Mail doesn't hold this information Total Weight of All Total Declared Value therefore it will have to be manually Either overall value or individual entered each time. Can have up to 7 value e.g. value of 10 rulers license numbers, separated by a Copy Contents to Next Items Copy Contents to All Items comma.

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The customer will then be required to fill in the table below which will appear towards the bottom of the 'Enter a Shipment' page. The below screenshot illustrates what is required.



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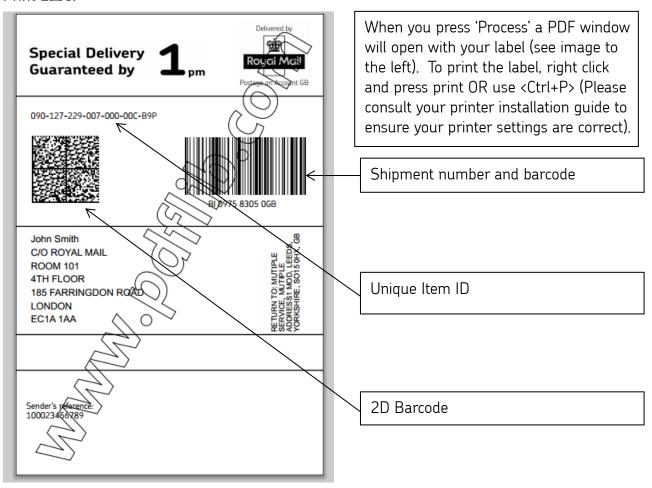
Postcode and Address Searches

The system has a built-in facility to find the address from the postcode, and postcode from the address. All of the address information is from Royal Mail and the system holds the complete 'postcode address file'; this is called the PAF. The PAF used in Despatch Manager Online system is as up-to-date as it can possibly be.

Find the address from the Postcode:



Print Label

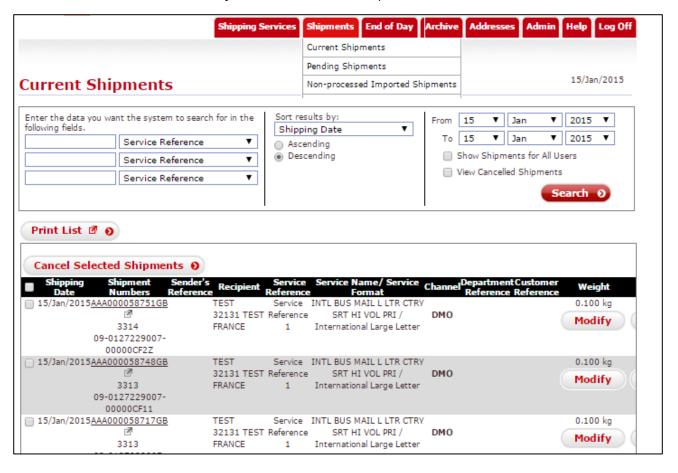


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Current Shipments

All of the shipments created through Manual input, Batch import or On Demand will be listed in this table ready for processing into the End-Of-Day Customer Collection Receipt. This screen is split into two parts: the search criteria and the table of live shipments:

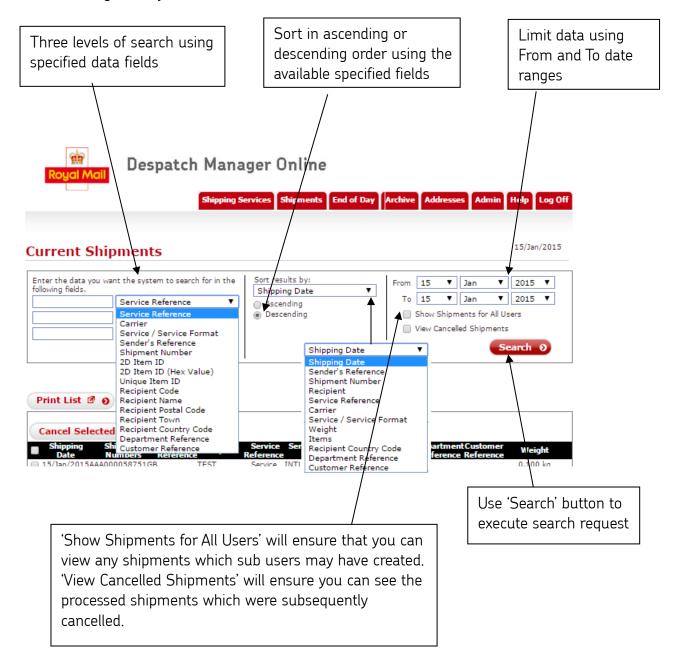
The screenshot below shows you the table of live shipments:



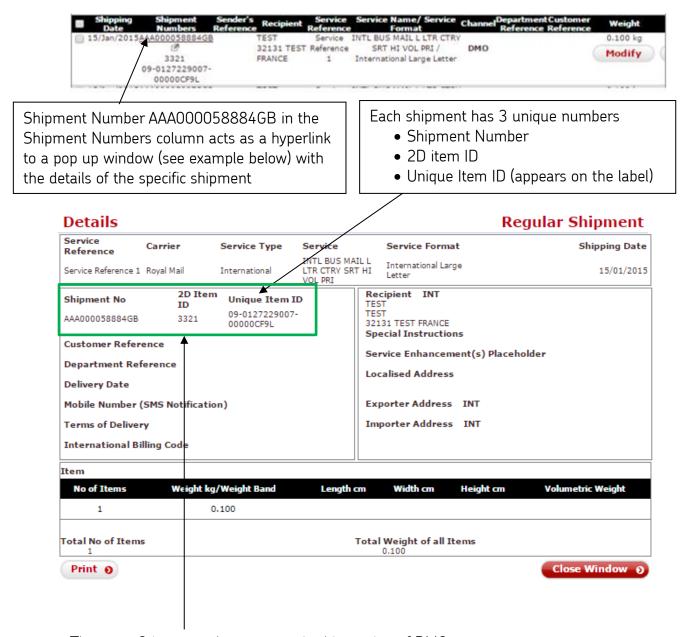
View Current Shipments - Search Options

To access the list of your shipments, go to the Shipments menu and click on Current Shipments as shown above. A set of criteria allows searches for one or several shipments. The criteria act as a filter to facilitate the display only the shipments required. 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



View Shipment Pop-Up Detail



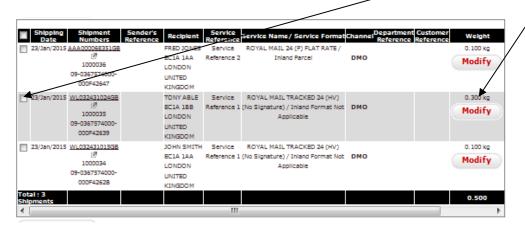
There are 3 item numbers present in this section of DMO:

- Shipment No the number given to each shipment in DMO. If it starts with AAA this indicates that the item has been sent using a non-trackable/non-signed for service. If the item can be tracked or signed it will start with two letters e.g. BI, JH, RO etc
- 2D Item ID Hexadecimal representation of the shipment number for a mail piece
- Unique Item ID this number is composed of the channel ID, account number, 2D item ID and a check digit.

Note: Department Reference field shows the details, if any, set up on your OBA Account.

Modify a Shipment

To modify a shipment, you will need to tick the relevant box and then click on Modify

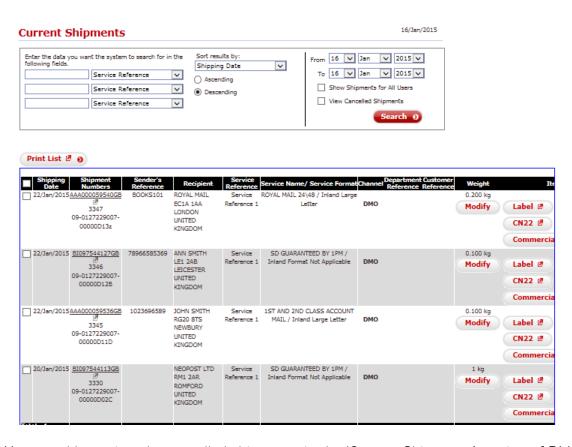


Once you have done this you will be taken into the 'Enter a Shipment' screen where you can make the necessary modifications to the shipment.

Once you have made the modifications and processed the shipment, you will be given a new label to print. The old shipment will have been overwritten with the new details as well as a new tracking number.

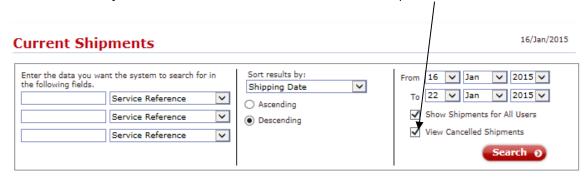
Cancel a Shipment

To cancel one or several shipments, check the box next to a selected shipment and then click on the Cancel Selected Shipments button. A warning message to confirm cancellation is displayed. Click on to process cancellation. Note: that the shipment will be cancelled but not deleted from the system in order to provide historical traceability via your archived shipments. You will NOT be able to retrieve the shipment to make it live again once it has been cancelled.



You are able to view the cancelled shipments in the 'Current Shipments' section of DMO.

To do this you will need to tick the 'View Cancelled Shipments' box

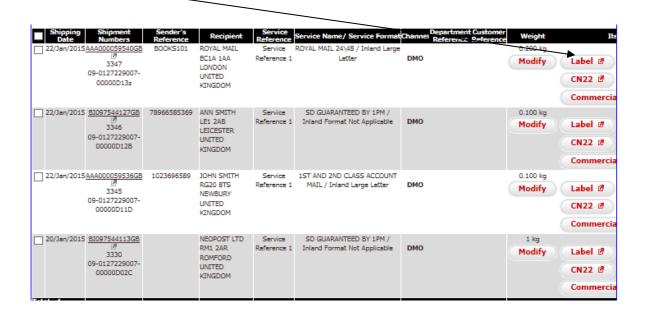


Cancelled shipments will be labelled with the word CANCELLED on the list of live shipments. No label reprint will be available for shipments that have been cancelled



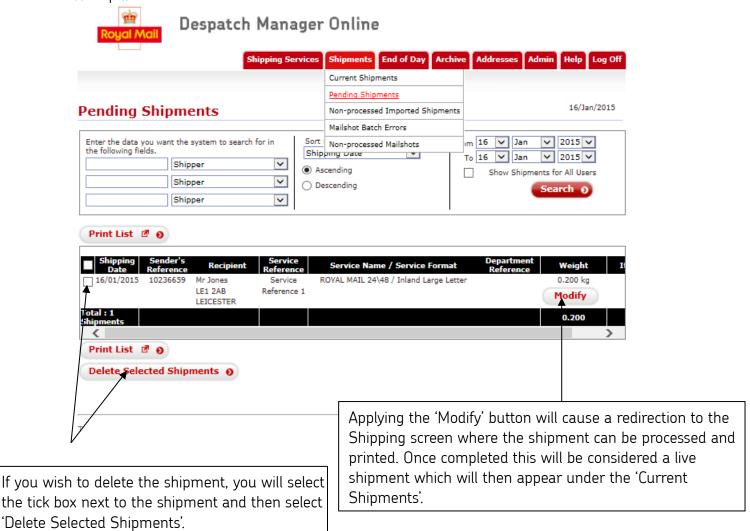
Re-print a label

If you wish to re-print a label without making any modifications you will need to click on the 'Label' button. As well as this, the international documents can be re-printed here.



Pending Shipments

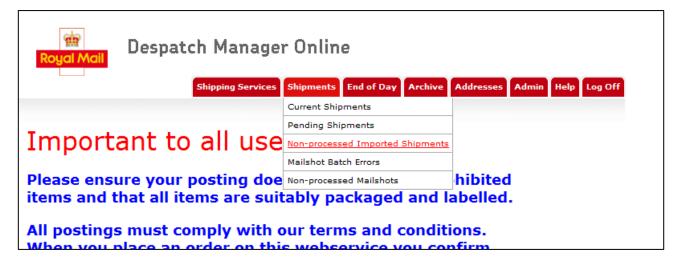
Pending shipments are those that are on HOLD – they will not appear on the Customer Collection Receipt. On the Shipments sub-level menu there is an option, Pending Shipments, to view all the shipments that have been saved to the database but not to the Customer Collection Receipt..



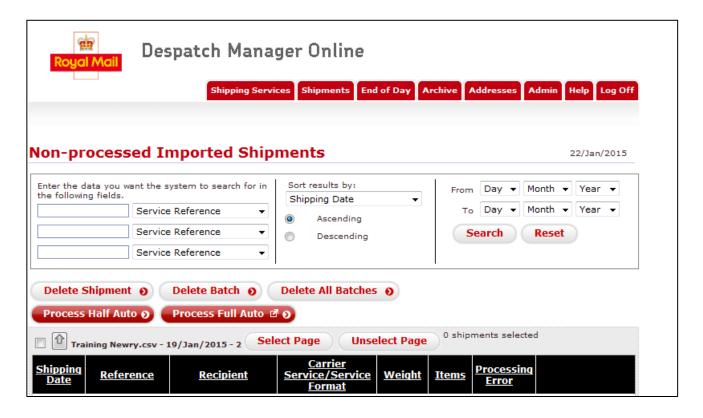
Non-Processed Imported Shipments

Non-processed Imported Shipments are accessed under the 'Shipments' tab.

This is used to store shipments which have been imported through the 'Import Shipments' section of DMO, but not processed.



If a customer wishes to process a shipment(s), there is the ability to select one shipment, several shipments (Half Auto) or a full batch (Full Auto). See the screenshot below which illustrates this. Once they have been processed, they will move from this section of DMO to 'Current Shipments' and then become eligible to run through the EOD process.



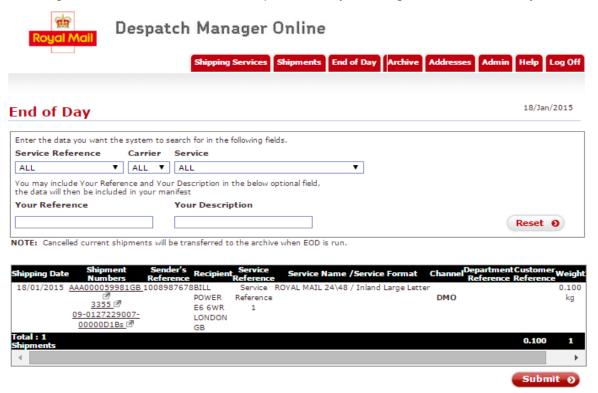
End of Day (EOD) Process

Running End of Day Process

From the 'EOD' menu option, a user can 'Run EOD' or 'Reprint EOD Customer Collection Receipt'. This will show shipments in the 'Current Shipments' that are ready to be confirmed. Once the EOD has been run, there isn't any functionality to re-print, modify or cancel any shipments.

Whilst the customer is expected to run the EOD manually, a cleansweep process happens everyday on DMO. This automatically runs the EOD and will clear what is in the 'Current Shipments'. By default the cleansweep is set to 6pm (the customer needs to contact the DMO help desk if they require a different time)

Selecting the Run EOD Process menu option takes you straight to the End of Day below screen:



Using the button, the Customer Collection Receipt can be generated and pre-advice /sales order files can be forwarded to Royal Mail.



When you click on the collection receipt link, you will be presented with the below screen:



To print the Collection Receipt, click on the Adobe Acrobat printing icon on the left side of the screen OR right click and press 'Print'.

Re-print EOD paperwork

Royal Mail Despatch Manager Online	
Shipping Services Shipments	End of Day Archive Addresses Admin Help Log Off
	Run EOD Process Reprint EOD Customer Collection Receipt
Search and Reprint Customer Collection Receipt using either a date sear reference or the sales order number. Click the submit button to activate the sear ■ Date search for Customer Collection 26 ▼ Aug ▼ 2010 ▼ Receipt(s): ■ Specific Sales Order Reference :	Search by:
Specific Sales Order Number :	Submit 0
The last 10 Customer Collection Receipts are below. Click the link below to open • Customer Collection Receipt (PDF): [2010-08-27] Sales Order Reference	· ·

If a Customer Collection Receipt to be printed was recent (the last ten created), it will be listed at the bottom of the search criteria.

Clicking on the * Customer Collection Receipt (PDF) hyperlink re-launches the receipt in PDF format.

If the collection receipt cannot be found in the list of the last ten, use the search criteria provided to retrieve it from the system. Options available to search on are:

- The Customer Collection Receipt creation date (date on which EOD process was run)
- The Sales Order Reference (Customer Collection Receipt Batch Number)

Customer Collection Receipt ♂ (PDF): [2010-08-27] Sales Order Reference: 3: Sales Order Number=[not set]

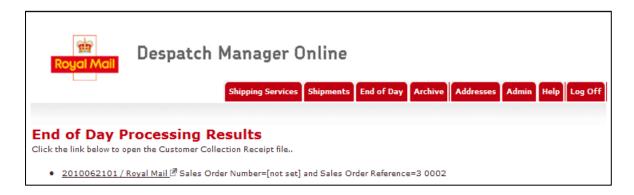
• The Sales Order Number

•

• The Sales Order Number will be returned to you after processing EOD. There may be a slight delay of upto 24 hours in returning this. In the meantime the message 'Not Set' appears.

Search and Reprint Cu	stomer Collection Receipt	27/Aug/2010
	ection Receipt using either a date search, Customer Collection Recei c the submit button to activate the search.	pt batch number / sales order
Date search for Customer Collection Receipt(s):	26 ▼ Aug ▼ 2010 ▼	
Specific Sales Order Reference :	3	
Specific Sales Order Number :		Submit 0

Use the Submit button to execute the search request. In the example above, Sales Order Reference number 3 is specifically being searched for, the result is displayed as shown below:



Note: The Collection Barcode does not appear on re-printed collection receipts.