How to Add a Courier Service

Overview

Our courier integrations support a wide range of delivery services, including Proof of Delivery (POD), Saturday delivery, and next-day delivery. **Voila** provides predefined service presets for each courier to simplify the setup process, ensuring you always have access to the most up-to-date and commonly used options. These presets, known as **System Presets**, eliminate the need to manually search for service codes or configure them in your account.

Selecting a preferred service will automatically assign your parcel to the corresponding option. This guide will walk you through adding a courier service to **Voila**, focusing on the **Courier Directory**, where you can easily access and configure system presets for any courier.

Creating Custom Courier Presets

1. **Accessing System Presets:** To access the system presets, navigate to the "Courier Directory" page from the menu on the left-hand side.
2. **Viewing Courier Integrations:** The Courier Directory page overviews all available courier integrations within **Voila**. To view the predefined system presets for a specific courier, **click** on the corresponding courier's logo in the directory. The primary purpose of the Courier Directory is to **utilise** existing system presets and **create** custom presets tailored to individual API accounts. System presets are preconfigured settings granting access to each courier's distinct services. For instance, **clicking** on the DPD entry will display the available system presets associated with DPD.

3. **Selecting an API Account:** From the top right corner, **select** the API Account to which you want to add the preset, then **click** "Add Preset". If you still need to configure an API Account, you can learn how to do so through this API Accounts guide. Before proceeding, ensure you have **chosen** the appropriate API account to manage multiple accounts.
4. **Selecting and Adding Presets:** In the popup window, **select** one or more presets and **click** "Add Presets" at the bottom left corner of the window. This action will immediately **add** the selected presets to your API Account.
5. **Creating a Custom Preset:** If the desired service preset is unavailable, you can create one by **clicking** the "+ Create Custom Preset" button at the bottom left corner of the window.
6. **Providing Custom Preset Details: Enter** the necessary details for the custom preset, including the preset name, service ID, anticipated lead time, and mandatory fields specific to the chosen courier. For instance, you can add notes to your presets to store specific information, like "only valid in the USA." A note icon will appear next to the preset to indicate that it contains additional information.
7. **Applying Restrictions to Presets:** To use the new preset selectively, **click to check** the "Apply restrictions to this preset" checkbox and define rules by **selecting** specific parameters. This section allows you to tailor your shipments using the new service preset based on weight, dimensions, value, and more criteria. For example, you can designate a preset for shipments exceeding £40 but below £120 or restrict it to shipments destined for specific postcode regions. Additionally, you can specify the countries where this preset will be applicable.
8. **Saving as a System Preset: Click** the "Create as a System Preset" option to **save** this custom preset as a system preset. It will be **listed** on the previous page, where all the configured system presets are listed. This allows you to **click** and **install** presets easily without configuring them. This way, you can **install** this preset to other API accounts you may have without needing to create it again.
9. **Finalising the Custom Preset:** Once you have finished configuring your custom preset, **click** "Create Preset" at the bottom centre of the page to complete the process.

> It's worth noting that the information required for presets may vary across couriers. The next section explains the courier-specific requirements.

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Click to Play or Pause the Video

Courier Specific Documentation

It's important to note that presets' particulars can vary across couriers.

Refer to the dedicated documentation page for each courier to gain insight into its distinct requirements and specifics.

This resource provides comprehensive information about each courier's preset's unique details and criteria.

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