RoyalMail Click & Drop

Overview

Voila provides integration with RoyalMail Click & Drop, enabling users with a RoyalMail Click & Drop account linked to their RoyalMail OBA (Online Business Account) to leverage this integration instead of our alternative RoyalMail integrations.

This documentation will guide you through acquiring the necessary API credentials from RoyalMail Click & Drop and incorporating them into **Voila**. Additionally, we will outline any required supplementary steps, such as registering a Click & Drop account and retrieving essential information like your Account Number and Poster details from your RoyalMail OBA account.

Creating a Royal Mail Click & Drop Account

To integrate Royal Mail Click & Drop with **Voila** , it's essential to have a Royal Mail Click & Drop account linked to your RoyalMail OBA (Online Business Account). To begin the registration process for a Click & Drop account, please follow these steps:

1. **Navigate** to the following URL: https://parcel.royalmail.com/
2. **Select** the "Register for Click & Drop" option.
3. **Complete** the mandatory fields and **click** "Next."
4. **Note:** Ensure you **register** using the email address associated with your OBA.
5. You will encounter two registration options. The first allows you to **create** a Click & Drop account independently, while the second option involves **linking** it to your existing OBA account. Since integration necessitates connecting your Royal Mail Click & Drop and

RoyalMail OBA accounts, we recommend **selecting** the second option.

6. **Enter** your "Account Number" **and** "Poster Number," then proceed by **clicking** "Next." We will guide you in retrieving these details later in this document.
7. If you wish to **receive** updates from Royal Mail Group regarding their products, services, and offers, you may **check** the relevant options and **click** "Next."
8. After successfully registering, you will be redirected to the login page by **clicking** "Go to login." However, before gaining access, you must activate your account.
9. Check your inbox; you will **receive** an email like the one below. **Click** on the "Activate account" link within the email.
10. **Set** a password and confirm it, then **click** "Set password."
11. With your password successfully set, you can now access Click & Drop by **clicking** the "Go to Click & Drop" button.

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After **clicking** the button, you will be prompted to **enter** your address and provide additional details related to your account. **Complete** the required fields and then **click** "Save" to proceed.

Following this action, you will be automatically redirected to your Click & Drop dashboard.

Please be aware that the system will conduct a **background verification process** to ensure that the provided information aligns with your OBA account. If any discrepancies are detected, the linking process will be rejected. This validation procedure typically takes approximately **48 hours**. Once it is confirmed, you will **receive** an email confirming the successful linking of your accounts.

If you already possess a Click & Drop account and wish to verify whether your OBA account is linked to your RoyalMail Click & Drop account, you can do so by **navigating** to "My Account" > "My profile."

On the right-hand side of the page, you should find a section labelled "Your OBA account details."

If you require assistance or further information regarding this linkage, please consult your Royal Mail account manager, who will be able to provide guidance or obtain the necessary details for you.

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Accessing the Account & Poster Number

This document section will guide you through locating your Royal Mail OBA (Online Business Account) Account Number and Account Poster. As mentioned, the Account Number and Poster are essential for registering a Royal Mail Click & Drop account connected to your RoyalMail OBA account. The Account Number consists of ten digits, beginning with a zero, while the Account Poster is also a ten-digit number but starts with a 9. To find these crucial details, please follow these steps:

1. **Access** your Royal Mail OBA account by visiting the following URL:
2. https://www.royalmail.com/discounts-payment/credit-account/online-business-account
3. **Click** on the "Access Online Business Account" button.
4. Within the "Orders" tab, **navigate** to "Your accounts."
5. **Locate** the Account Poster in the "Posting Locations" column.
6. Next, **click** on the "Invoices" tab.
7. Under the "Customer Account" section, you will find the Account Number.

Following these steps, you can easily retrieve your Royal Mail OBA Account Number and Account Poster.

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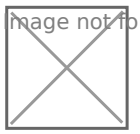
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Obtaining the API Key

Here are the steps to **obtain** the API Key for your RoyalMail Click & Drop account:

1. Begin by **logging** into your Click & Drop dashboard using the following link: https://auth.parcel.royalmail.com/account/login
2. Once logged in, **navigate** to the "Settings" option at the top right of the page.
3. In the "Settings" menu, **select** the "Integrations" section.
4. **Look** for the "Add a new integration" option and **click** on it.
5. **Choose** the "Click & Drop API" option, as the provided image indicates.
6. The fields may already be pre-filled, or you can **enter** a new "Default trading name" **and** "Integration name." Make any necessary changes and then **click** "Save."
7. **Note: Enter** your Company Name as the "Default trading name" within Addresses for Despatch Cloud or **Voila**.
8. After saving, your new integration will be displayed in the list. **Click** on it to access further details.
9. The "Click & Drop API authorisation key" has been generated. You can now **copy this key.**

Now, you have both the API key and the Trading Name. These details will be required when configuring **Voila** with RoyalMail Click & Drop.



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Customising Royal Mail Click & Drop Label Formats

This guide outlines the steps for configuring and personalising your Royal Mail Click & Drop label formats directly within the Royal Mail website.

1. **Access Settings: Login** to your Click & Drop account and **navigate** to the homepage. **Locate** the "Settings" button, typically highlighted in the top right corner, and **click** on it.
2. **Select "Label Format": Identify** and **click** "Label Format" from the available options.

3. **Review Format Options:** The left-hand side of the screen displays all available Click & Drop label format and size options. **Explore** these options to find the best fit for your needs.
4. **Preview Changes: Selecting** different format options on the left will dynamically update the preview pane on the right. It allows you to visualise how your final label will appear before saving.
5. **Save Configuration:** Once you've chosen the desired format and size, ensure you **save your changes**. The save button is positioned at the screen's top or bottom right corner.

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Installing Royal Mail on Voila

To integrate Royal Mail Click & Drop with **Voila**, you'll need to **add the API Credentials** obtained from your Royal Mail Click & Drop account into your **Voila** account. Follow these steps to add the credentials:

1. **Log** in to your **Voila** account.
2. **Navigate** to the "API Accounts" section in the left-hand side menu.
3. **Click** on the plus icon adjacent to "View Registered Auths."
4. **From** the "Select a courier" drop-down list, **choose** "Royal Mail Click & Drop."

Populate the required fields with your Royal Mail Click & Drop authentication details. You can refer to earlier instructions on obtaining the "api_key" and "trading_name."

- **Company:** You can optionally **input** a company name for differentiation purposes. This field is helpful if you manage multiple accounts with the same courier.
- **Testing Flag:** Ensure that the Testing field is appropriately set. If you are in **testing mode**, mark it as **"Yes"**; otherwise, leave it as **"No".**
- **Notes:** This field is not mandatory. You can add notes if desired or leave them blank.
- Once you have filled in the fields, **click** the "Save Changes" button.

Congratulations, the courier integration is now completed.

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