Shipments

Explore and manage your shipments.

- Shipments

Shipments

Overview

The Shipments page provides a centralised view of your shipment data, offering crucial details like courier service, request date, and reference. You can delve deeper into API request records and parcel tracking information, with options to cancel shipments, view and print labels, and access product specifics. Custom views introduce additional columns tailored to your preferences for added customisation, enhancing your overall shipment management experience.

Accessing the Shipments Page

Click the "Shipments" button in the left-hand menu to access it.

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Selecting Views

It's important to emphasise that you have complete control over the content and layout of the Shipments page, allowing you to tailor it to your preferences. To select your preferred display, click on the highlighted circular button in the page's upper-right corner.

You have the flexibility to choose from three distinct views, allowing you to customise the columns and filters visible to you:

- **Standard View**: This is the recommended default view, ideal for users who wish to focus on essential information for efficient shipment tracking.
- **Advanced View**: The advanced view is tailored for developers and those who require in-depth access to shipments' request and response details.

- **Custom View**: With the custom view, you can craft a personalised display by selecting specific options. You can choose which columns to display using the "Column Selector" and determine which filters are visible in the "Filter Selector" section according to your preferences.

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Searching and Filtering

On the right side of the search bar, you can search through your shipments using three distinct search parameters; here's a breakdown of these parameters:

- **DC_REQUEST_ID**: This unique reference we generated allows you to identify and reference individual shipments. In the shipment list, it appears as 'ID.'
- **REFERENCE**: The customer sets this field when creating a shipment request. Customers have the flexibility to define this reference as needed, though we recommend avoiding duplicates to ensure clarity.
- **TRACKING_CODE**: This corresponds to the courier's tracking code, which can be used to trace shipments.

Additionally, you'll find the date picker on the far right side of the search bar. This feature enables you to specify the date range for your search. To adjust the date range, click on the calendar icon. You have three options:

- **Manual Date Range**: You can select a date range from the calendar.
- **Fast Date Picker**: This convenient feature offers preset date range options commonly used, such as "This Week," "Last Week," "Month," and more.
- **Time Picker:** If needed, you can even narrow your search to a specific hour.

You'll find the filters section below the search bar, a powerful tool for refining your shipment search. The filters available will vary depending on the chosen view. Here's a comprehensive overview of these filter parameters:

- **Couriers**: This option allows you to select specific courier services for your scrutiny.

- **Friendly Service Name**: Utilise this filter to search for shipments associated with a particular courier preset. You can input either the Service ID or the name of the preset. For example, you can enter "IPX-DPDND" as the Service ID or "DPD Parcel Next Day." For a deeper understanding of courier services and presets, refer to the "How to Add a Courier Service" document.
- **To Name**: Use this filter to locate parcels sent to a specific recipient by entering their name.
- **To Company**: Enter the company name to identify shipments sent to a particular company. It corresponds to the "company_name" in label requests as the shipment's contact details.
- **To Postcode**: Locate parcels delivered to a specific postcode by entering the postcode.
- **To Country**: Select the desired country or countries to narrow shipments to a specific destination.
- **API Group & Account**: This filter is relevant for retailers or individual API users with only one API Account. However, resellers or agencies managing Voila for multiple customers may have multiple API user accounts (configurable in the "API Accounts" page). Use this filter to choose the API account or accounts you wish to examine.
- **Account Name & Number**: For courier resellers, customers are assigned "Account Name" and "Account Number" values when setting up their accounts. These values are defined if a request originates from a customer's customer. In such cases, select a specific "Account Name" or "Number" to review shipments related to that account exclusively.
- **Response Result**: You can filter shipments based on whether they have succeeded or failed.
- **Tracking**: Use the Tracking filter to refine shipments by specific statuses, such as "Booked," "Collected," "Delivered," and more.
- **On-Time/Late**: To focus solely on shipments with specific time-related statuses like "Expected Late," "Expected On Time," "Delivered Late," or "Delivered On Time," make your selection here.
- **Cancelled**: Voila offers the capability to cancel labels sent (details on cancelling labels are provided later in this document). This filter lets you view shipments that have been cancelled or are still active by choosing "Yes" or "No."
- **Archive**: This filter exclusively displays archived and inactive shipments. You can choose between the "Yes" or "No" options.

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Shipment Details

You'll find a comprehensive display of shipment details on the Shipments page. Let's take a closer look at the information presented, moving from left to right:

- **Courier Service**: This column provides information about the courier service used for each shipment.
- **Request Date**: Displays the date when the shipment request was made.
- **Reference**: This field contains the reference associated with each shipment provided by the customer during the shipment request.
- **Response Result**: If you click the "See Requests" button, you will be directed to the "API Request Records" page, offering a comprehensive view of all information related to this request.
- **Tracking Section**: This section provides tracking information for each parcel sent via a tracked service. Clicking "See History" opens a window with detailed tracking information, including:
  - **Shipment**: The customer's reference for the shipment.
  - **Tracking Code**: The unique code provided by the courier for tracking purposes.
  - **On-Time Status**: Indicates whether the shipment is expected to be on time or late.
- **Tracking Status**: Depending on the courier and parcel status, you may encounter various statuses, including:
  - Booked
  - Collected
  - At Hub
  - In Transit
  - Out for Delivery
  - Failed Attempt
  - Delivered
  - On Hold
  - Address Issue
  - Returned to Sender

    - Tracking Expired
    - Cancelled
    - Awaiting Customer Collection
    - Authentication Failed
    - Please note that not all couriers support all these statuses, and some may not provide tracking updates. However, all couriers typically support the "Booked" and "Delivered" statuses.
- **Cancel**: Allows you to initiate the cancellation of a shipment, with the cancellation request forwarded to the courier.
- **Label**: Clicking this option redirects you to a new tab where you can view and print the shipment label.
- **Info**: Provides detailed information about the label, including product dimensions (Width, Length, Height, and Weight in metric units), SKUs contained within the shipment, and the Tracking Code.
- **Custom View**: If you opt for a custom view, additional columns become visible, such as "To Name," "To Company," "To Postcode," "To Country," "Reference," and "API Account" (also "Account Name" and "Account Number" if selected). These columns correspond to the filters discussed in this document's "Filters" section, offering further customisation options.

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Downloading CSV

To obtain a report of your shipments, click the "Download CSV" button in the top right corner, as illustrated below. An Excel-format file will be generated for you, and within moments, it will initiate the download process. Please note that the download duration may vary depending on the selected data size, so it might take a while, as indicated in the image below. Once the file is ready, it will be delivered to your email address, allowing you to access and download it.

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Creating a Shipment

To begin the process of creating a shipment, follow these steps:

1. Click the "Create Shipment" button in the top left corner of the page.
2. You will be prompted to do so if this is the first time you have created a sender address. Click the "Add Address" button to proceed.
3. Fill in the "Sender" address as explained below and click "Add Address" to continue. You can edit this address later using the "My Account" page:
   - **Address Name**: Give a name to your address for easy recognition later.
   - **First Name**: Enter the sender's first name.
   - **Last Name**: Enter the sender's last name.
   - **Email**: Enter the sender's email address for contact purposes.
   - **Phone**: Enter the sender's phone number for any necessary communications.
   - **Address Lookup**: Use this feature to search for your address using a name or postcode. Click "Search" and select your address from the options provided. This helps quickly fill in the address details.
   - **Company**: Enter the name of the sender's company, if applicable.
   - **Address Line 1**: Enter the primary street address of the sender.
   - **Address Line 2**: Enter additional address information, such as a suite or apartment number, if necessary.
   - **City**: Enter the city where the sender is located.
   - **County**: Enter the county or region where the sender is located.
   - **Postcode**: Enter the postal code for the sender's address.
   - **Country**: Select the sender's country from the dropdown menu.
   - **Company ID**: Enter the identification number assigned to your company for business identification purposes.
   - **Tax ID**: Enter the tax identification number used for tax reporting and compliance.
   - **IOSS Number**: Enter the Import One-Stop Shop (IOSS) number, simplifying VAT payment for goods sold to EU customers.
   - **EORI ID**: Enter the Economic Operators Registration and Identification (EORI) number, which is required for customs declarations in the EU.
   - **XI EORI**: Enter the XI EORI number if applicable. This is used for trade between Northern Ireland and non-EU countries.

- **EU EORI**: Enter the EU EORI number if applicable. This is used for trade within the EU.

4. On the "Shipment Details" page, select a saved "Sender" address from the top. Below that, manually fill in each shipment's "Recipient" address information. The fields are the same as on the previous page; refer to the earlier step for explanations.
5. Enter the weight and dimensions of your parcel. If you have multiple parcels in a shipment, click the "+ Add Another Parcel" button in the bottom left corner to add more parcels. To add a product to the parcel, click the "Add Product" button below the parcel information and fill in the details. Set the currency of this transaction. Click "Continue to Next Step" once all information is entered. Field explanations for this section are provided below:
   - **Parcel**:
     - **Weight (kg)**: Enter the weight of the parcel in kilograms.
     - **Length (cm)**: Enter the length of the parcel in centimetres.
     - **Width (cm)**: Enter the width of the parcel in centimetres.
     - **Height (cm)**: Enter the height of the parcel in centimetres.
     - **Action**: Use the trash bin icon to delete this parcel if necessary.
   - **Add Product**:
     - **Product Name**: Enter the name of the product being shipped.
     - **Qty**: Enter the quantity of the product.
     - **SKU**: Enter the product's Stock Keeping Unit (SKU), which is used for inventory management.
     - **Value (in your selected currency)**: Enter the product's value in the currency used for customs declarations and insurance.
     - **Weight (kg)**: Enter the weight of the product in kilograms.
     - **Action**: Edit or delete the product details from the shipment if necessary.
   - **Currency**: Select the currency for the transaction. Supported currencies are GBP, USD, EUR, JPY, CAD, CHF, AUD, and CNH.
6. On the "Presets" screen, choose from the "Rule Groups" you created earlier to get a Smart Shipping recommendation based on your rules. You can use the "Smart Shipment Recommendation" feature or select from the "Shipping Services" installed below. Click the "Create Shipment" button once all information below is entered:
   - **Smart Shipping Feature**: Learn more about setting up and using this feature on our dedicated documentation page here.

- **Shipping Services**: This page provides details on installing a courier integration. After installing your shipping service, you can learn about installing a courier service here.
- **Print Documents**: Select a label size from the dropdown. For the size information, see our "Label Sizes and Usage Guide".
- **Reference ID**: Set a manual reference ID for this shipment to help you track and identify the shipment later.
- **Collection Date**: Use the date picker to select a collection date for this shipment. This is the date on which the shipment will be picked up.
- **Add Delivery Instructions**: Add additional notes to the label, such as special delivery instructions for the courier.

7. Your shipment is created. Use the "Print Label" button to display and print the label, ensure you have entered all the correct information; the system will keep checking to ensure until everything is correct.
8. Clicking the previous button will open a new tab in your browser, displaying the label in PDF format. You can print it from there.

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