



Click&Dispatch User Guide



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1. Introduction to Click & Dispatch

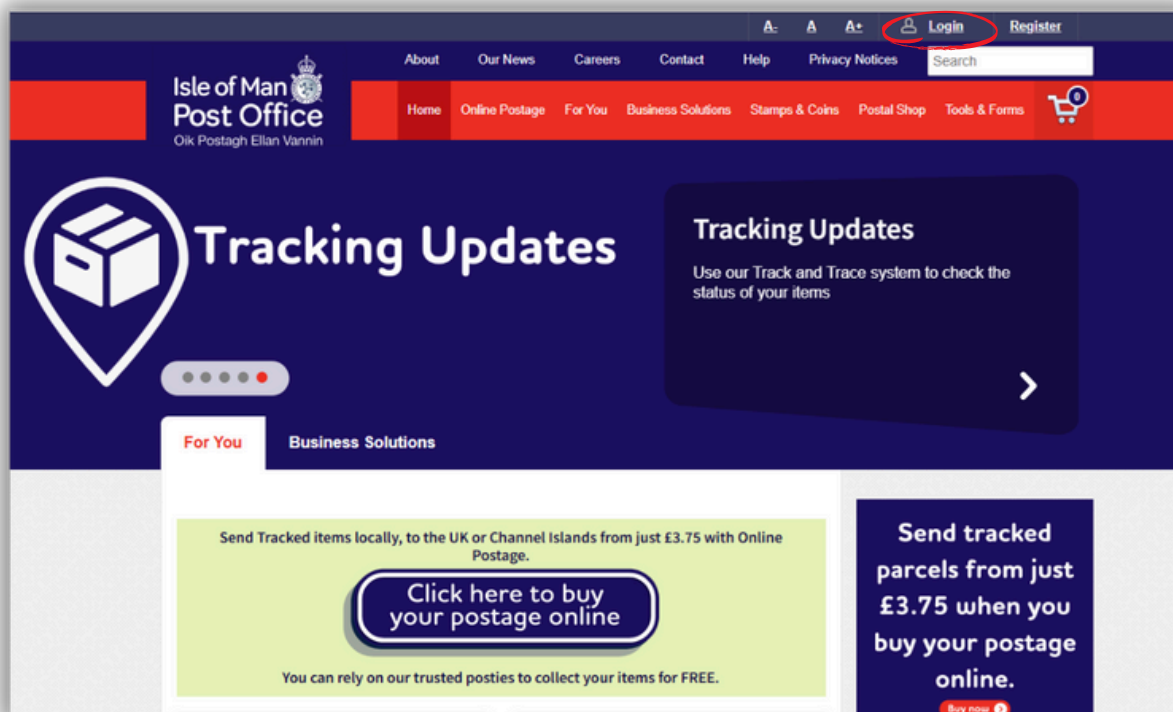
Click & Dispatch is an online solution from Isle of Man Post Office supporting all account customers to manage shipping, print labels and manage addresses, submit online customs declarations and much more.

Address details and Click & Dispatch labels are only required for Local Tracked, Local Tracked Plus, Special Delivery Next Day, Special Delivery - Two Day, Tracked 48, Parcelforce, and for all shipments requiring customs information. You will continue using your PPI (postage paid impression) for all standard UK and international standard 'documents only' shipments.

The following information will guide you through using Click & Dispatch.

Logging In

For your initial login you will receive an email with the required login information. Using the link provided, you will be able to login and will be prompted to change your password. From then on you will be able to login to your Click & Dispatch account from the homepage on Isle of Man Post Office's website. Go to iompost.com and click on Login, (as shown below).

The image shows a login form titled 'Login to your Online Post Office Account'. It has two input fields: 'Your Email Address' and 'Password'. Below the 'Password' field is a link that says 'Forgotten Your Password?'. To the right of the form is a red button labeled 'Log In'.

Warning: The system will block accounts after several unsuccessful password entry attempts; if you are unsure about your login information request a new password using the "Forgotten Your Password?" process.

2. Account Home Page



Once you have logged into your online account, you will access the online account welcome screen.

- 'Your Account Details - Manage Shipper Details' allows you to manage your shipper details, the sender information that is shown on the postage labels and on customs documentation. See section 3.
- 'Manage your Address List - Address Book' takes you to your address book, where you can add, delete and manage frequently used addresses. See section 9.
- 'Administration' takes you to the Click & Dispatch User Management. Depending on access rights, users may see different links in this area or may not see 'Administration' at all. See Section 10.
- 'Click & Dispatch' takes you to the Click & Dispatch home page, which provides you with an overview of the service and its requirements.
- 'Create Manifest' takes you directly to Creating a Manifest.
- 'View Manifest' takes you to the list of all previously created manifests including a draft manifest you might have started already.

3. Amending Shipper Information

The information stored in this area is used as the Sender Information on postage labels and customs documentation when sending postage via Click & Dispatch. The shipper address must be an Isle of Man address.

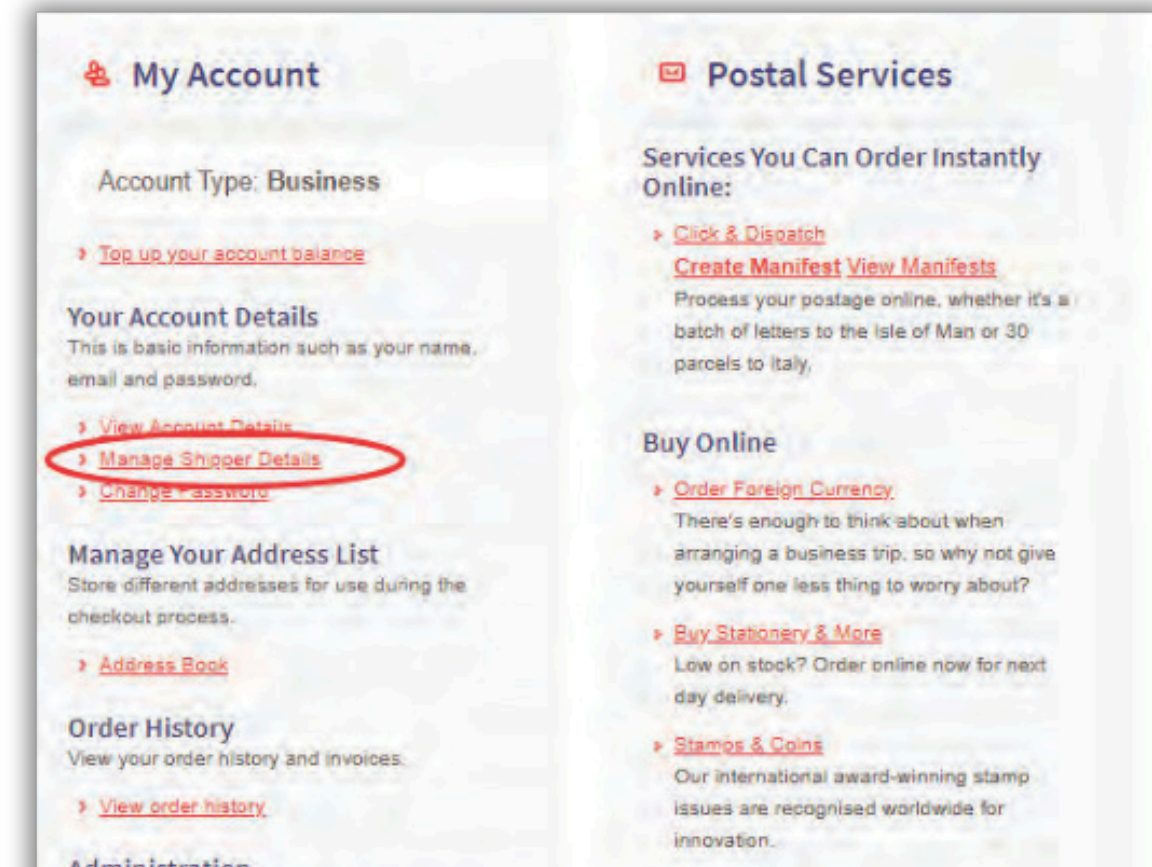
Initially Click & Dispatch automatically pulls through your account contact details (invoicing address). If you would like to use different contact details as Sender Information, please amend in this section. Please also review the shipper details on your first log in to ensure that the contact name, email and phone number stated in this section, is for a staff member who is able to answer potential queries about postal consignment.

The shipper information is managed on a company level, if your company is set up with multiple departments (for further details about departments and user set-up, please see section 10), the shipper information is managed on department level. Please agree on company, or department level, whose contact details should be shown on all postage labels and customs information. Changes from any users will be applied to the sender information for all users within that company/department.

Your email, which is recorded in this section, will also be used to provide you with potential maintenance or site alert information. In addition, if you have not yet, please feel free to sign up to our service alert emails by contacting customer services (customer.services@iompost.com).

Note: Changing the shipper details will ONLY change the information shown on postage and customs documentation, not your account or login details. If you need to change your account details, please get in touch with Isle of Man Post Office's Finance Department on 698410 or via finance@iompost.com.

If you want to change your log-in email, please check on the online account landing page (View account details, Contact Details) for who to get in touch with.




4. Creating a Manifest

Click & Dispatch saves information about the mail you are dispatching as a 'manifest'. Creating a manifest is simple and easy to do by following the drop-down options and letting the system generate the prices for you. Each User can only create one draft manifest per day, but can create more manifests once the drafts have been saved as final.

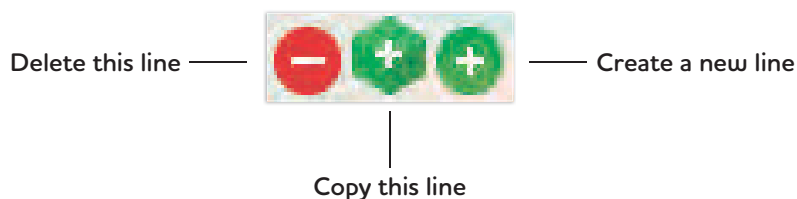
The screenshot shows the 'Postage Manifests' interface with the 'Create New Manifest' form. At the top, there are two input fields: 'Manifest Date' with the value '17/11/2021' and 'Manifest Name/Reference' with the value 'Compliance Mailing'. Below these is a table with columns: Destination, Weight (gm), Product, Does Only, Quantity, Unit Price, VAT Amount, and Total. The first row of the table has a dropdown for Destination, 'grams' for Weight, a dropdown for Product, '1' for Quantity, and empty fields for Unit Price, VAT Amount, and Total. To the right of the first row are three circular icons: a red one with a minus sign, and two green ones with plus signs. At the bottom right of the table, there are three buttons: 'Cancel', 'Save as Draft', and 'Save as Final'. Above these buttons is a checkbox labeled 'I confirm all items in this collection are safe to fly'. To the right of the table, there are three rows of totals: 'Subtotal' with a value of '£--', 'VAT' with a value of '£--', and 'Grand Total' with a value of '£--'.

Note: You can give each manifest a unique name. E.G. "Compliance Mailing"; something that can be used to identify your manifest for future reference. The manifest name is shown on your invoice and can be used to assign costs to the specific cost centres or projects within your organisation.

4.1. Icon Buttons

The Edit button  appears if further information for a manifest line is required (e.g. Special Delivery or Customs information). Click on the edit button to open or close the additional information per line.

The 'Copy this line' button copies the country, weight and service and therefore assists the creation of manifest if you are sending the same type of recorded item (e.g. Signed For, or Special Delivery) to multiple recipients in the same country. It does not copy the customs information. Ensure that you only copy one line at a time.



4.2. Preparing future manifest

Manifests and labels can be prepared in advance, but you must ensure that you input the scheduled dispatch date as the manifest date prior to inputting your mail items (if the date is amended at a later stage, all manifest lines that include address information will have to be re-opened and re-saved). Note: Manifests for Special Delivery - Next Day items cannot be prepared in advance and must be finalised by no later than 1pm on the day you would like the item dispatched.

4.3. Special Characters


Please be aware that as the Click & Dispatch system communicates with multiple other platforms (e.g. Royal Mail and Parcelforce), there is a system intolerance to special characters within names or addresses. Where possible, please avoid using special characters at all. Click & Dispatch will return an error message when a special character is stopping the progression of this data transmission.

4.4. Create a Manifest Line for national and international Standard Mail

Please note: From February 2025 you will no longer be able to send Parcels locally, to UK or Channel Islands using standard mail via Click & Dispatch

1. If currently working on a manifest, add a new line. Otherwise select "Create Manifest". Choose the manifest date (default to today's date). Enter a 'Manifest name/reference' (optional).
2. Select the destination of the mail item(s) such as "United Kingdom" or start typing the specific country name. For ease of use the destination list includes regions (Europe, Rest of World) for all standard mail items.
3. You can only choose an international region destination if your mail items include 'documents only'. Ensure that you tick the 'DOCS only' box, which appears after the service has been chosen. To minimise the risk of delay or refusal, we advise that you mark these items with 'documents only', making it clear to the receiving countries customs.
4. If the item includes goods or gifts, please create a manifest line to the specific country, the system will automatically open a further section for the customs data; see section 5 on how to complete the required information and section 13.2 for links to further customs information.
5. Input the weight (in grams) of one mail item. If you have multiple mail items within the same weight/price bracket, you can choose the maximum weight and input all items in one manifest line. Note: Weighing scales are required to ensure that accurate weights are obtained.
6. Select the required service from the drop down list (letter, large letter and packet = standard services, for all other services see the following sections). For further information on service standards and size restrictions, please visit <https://www.iompost.com/business-solutions/outbound-mailing-solutions/>
7. A price for one single item is calculated automatically. Enter the quantity of the mail items to be sent. The total price for the line will be calculated and displayed (see below).

Destination	Weight (gm)	Product	Docs Only	Quantity	Unit Price	VAT Amount	Total
United Kingdom	35	Letter		1	£9.47	£0.00	£9.47

8. Keep populating your manifest with additional lines (using the  button). Once completed, confirm that all items are safe to fly and either "save as draft" (leaving the manifest open for further changes), or "save as final".

4.5. Create a Manifest Line for Local Tracked, Local Tracked Plus, Special Delivery - Next Day and Two Day, Tracked 48, International Tracked, Tracked and Signed or Signed and Parcelforce

1. If currently working on a manifest, add a new line, otherwise select "Create Manifest" or "Edit" a Draft Manifest that is already saved.
2. Select the destination of the mail item such as "United Kingdom" or start typing the specific country name (for these items you cannot choose regions (EU, ROW) from the drop-down).
3. Input the weight (gm) of the mail item.
4. Select from the available services displayed in the drop down list:
 - Local Tracked
 - Local Tracked Plus
 - Tracked
 - **Special Delivery - Next Day (SD Next Day 9AM or 1PM) - If using this service the manifest must be finalised before 1pm on the day of dispatch.**
 - Special Delivery - Two Day (SD 2Day £750)
 - Parcelforce express48 (PF Express 48)
 - International Tracked (IntTr)
 - International Tracked and Signed (IntTrS)
 - International Signed (IntS)
 - Parcelforce globalvalue or globalpriority (PF Global Value or PF Global Priority)

Note for guaranteed services: There are a small number of zones / postcodes where an extended delivery time exists or the service is not available. Information can be found using this link: www.iompost.com/SpecialDelivery

Please note: From February 2025 you will no longer be able to send items locally, to UK or Channel Islands using 'Signed For'.

5. Complete the recipient's details. All fields marked with an asterisk (*) are mandatory. The telephone number and, if available, email address are required for the delivering postal administration to contact the recipient in case of queries.
6. Completing the recipient's address details can be done in three ways:

- Input directly into the address fields presented to you (enter manually).
 - Find an address by entering the destination Post Code (only available for IOM, UK and Channel Island addresses). The system will automatically provide you with a choice of addresses for the entered post code.
- Note: When you use the Post Code look up, all fields that hold information on the Post Code database will be completed (this may include the Business Name, which could overwrite information you've already entered).
- Select the address directly from your address book of previously saved addresses (see section 9 for further information about the C&D address book).

7. If you have entered a new address and would like to save it to your C&D address book, tick the "Save Contact to Address Book" for use the next time you post to this customer.
8. Add an order reference number in the 'shipper reference' field if available, otherwise this field is automatically populated with your PPI (postage paid impression) number.

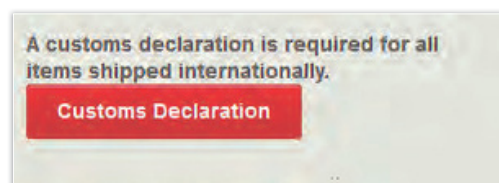
9. Depending on the service you have chosen, complete the additional fields for Service Add Ons.

10. If you are posting any item to a destination that requires customs information, please see section 5 on how to complete the customs declaration and section 13.2 for links to further customs information.
 11. Click on the "Save" button. Once the information has been processed the "Save" button will change to 'Print Labels'.
- Note: If you make any changes to the information in the manifest line, the 'Print Labels' button changes back to a 'Save' button. Ensure to select the 'Save' button to keep all changes.

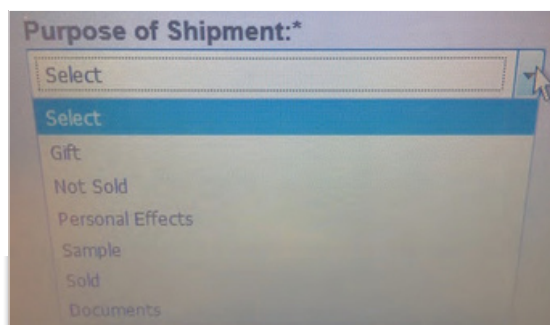
Finalised Manifest

5. Customs Declaration

Click & Dispatch will automatically provide fields for the Customs Declaration (CN23) for all destinations outside of the UK customs union (including the Channel Islands). It also complies with the Electronic Advance Data regulations which have been in place since the 1st January 2021. Only the minimal amount of input has been made mandatory, please check the destination's customs requirement to ensure you fully comply (see additional links in section 13.2). The provision of adequate customs information will minimise the risk of delays, rejections and possible penalties.




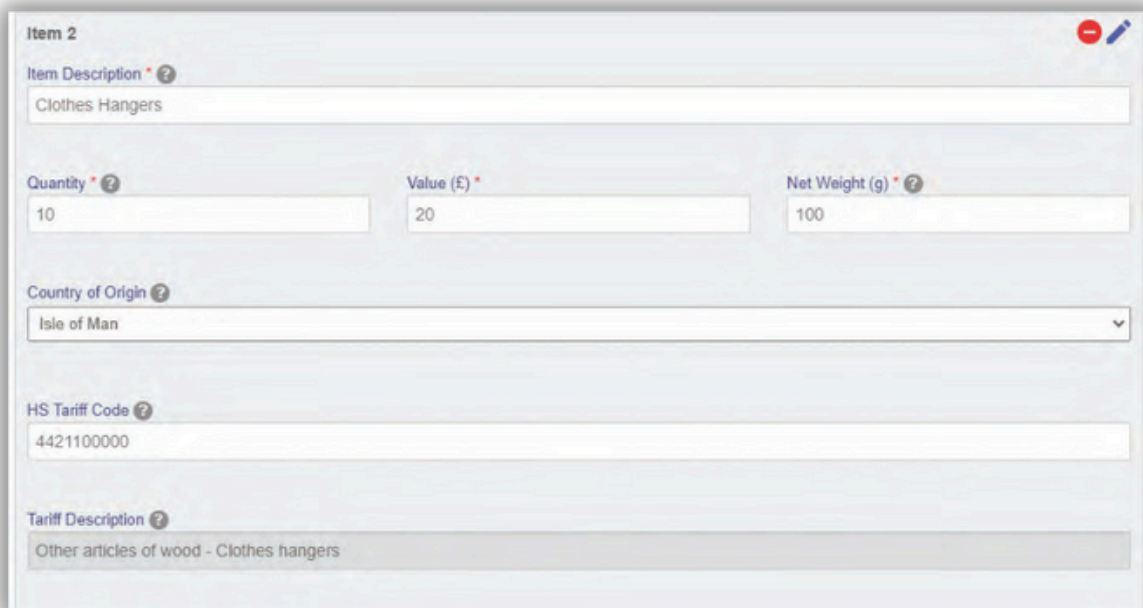
Purpose of Shipment: Please provide the total Consignment Value, the purpose of shipment (drop down with list of options, see section 12.1 for further information about each option) and all required information in the Customs Declaration area.



Certificate Number, Export Licence Number and/or Invoice Number: If your item(s) is accompanied by a licence or certification, state the number in the appropriate field. All commercial items should be accompanied by a commercial invoice, the system creates the required amount of commercial invoices, but you can send your own commercial invoices instead. If using your own Commercial Invoices, please take care that the amount tallies to the one generated through Click & Dispatch.



Comments: Provide details if the contents are subject to quarantine (plant, animal, food products, etc.) or other restrictions.

Click the pencil icon  to input the required item information and click on **"Add Item"** if you have multiple types of items within the parcel.



The screenshot shows a form titled "Item 2" with a pencil icon and a delete icon in the top right corner. The form contains the following fields:

- Item Description**: Clothes Hangers
- Quantity**: 10
- Value (£)**: 20
- Net Weight (g)**: 100
- Country of Origin**: Isle of Man (dropdown menu)
- HS Tariff Code**: 4421100000
- Tariff Description**: Other articles of wood - Clothes hangers

Clicking on the pencil icon  opens and closes each item information card, the delete icon  deletes unwanted item cards.

Item Description: Give a detailed description of each article. Vague, ambiguous, inaccurate or incomplete item descriptions may result in shipments being held in customs or rejected, leading to delays and possible penalties. Descriptions like "electronics" are not detailed enough, but "CD player" or "computer monitor" would be acceptable.

- **Quantity:** State the amount of items that fall under the same Item Description.
- **Value and Net Weight:** Both fields relate to the value per item.
- **The Country of Origin** is a mandatory field and will default to the United Kingdom. Please amend if necessary.
- **A valid UK HS tariff code** needs to be provided for all commercial items. If you need help identifying the relevant code, please go to www.gov.uk/trade-tariff. Once you have entered the HS tariff code, the system will automatically display the according tariff description.

Once all relevant information has been provided, please click "Save". Also ensure to press save if you re-visit the customs declaration information.

When you now "Save" the manifest line, the system will, in addition to the postage label, automatically create all necessary customs documentation. For some services the CN23 is provided as an additional label, which can be directly applied onto your postage item, other services provide the CN23 as an A4 print-out, which needs to be affixed in a clear postage pouch (potentially with any other additional documentation, e.g. commercial invoices).

Click & Dispatch also provides copies of the necessary amount of commercial invoices. If you use your own commercial invoices, please ensure to provide the required amount.

6. Print your Labels

You are able to print the labels as you complete each manifest line or you can print them when your manifest is fully completed. This is up to you, depending on your business procedures.

6.1. Print Postage Labels from the Manifest Line

Once you have saved your mail item you can print the label right away:

The screenshot shows a web interface for creating a manifest line. At the top, there is a table with columns: Destination, Weight (gm), Product, Docs Only, Quantity, Unit Price, VAT Amount, Total, and Add Line. The first row contains: United Kingdom, 150, SD 1pm £500, 1, £7.51, £0.00, £7.51. Below the table, there are two main sections. The left section is titled 'Please enter the recipient's address details' and includes a green button 'Get Contact from Address Book'. Below this, there are input fields for Business Name (The Window Company), Contact First Name* (Jim), and Contact Surname* (Smith). The right section is titled 'Add Ons' and includes a 'Cancel' button and a red button 'Print Label' which is circled in red. Below the 'Add Ons' section, there is a 'Shipper Reference*' field with the value 'D0057'.

1. Click on the "Print Label" Button.
2. Depending on how your browser is configured to display downloaded documents your label will be presented to you in one of the following ways:
 - In a pop up window as a PDF file
 - On a new tab as a PDF file
 - To your default downloads folder as a PDF to be opened.
3. Check your PDF Label is correct and then print and affix to the mail item.

Note: you can also print all of your labels from the manifest in one operation (see "Print a Manifest" in section 7.2).

7. Manifests

7.1. Saving your Manifest

If you wish to save your manifest in order to come back to it later, then it is recommended that you click on the “Save as Draft” button.

Note: If your company is set up on Click & Dispatch for multiple users, another user can only access your manifest once it has been saved “as draft” (see Section 10 for further details).

You will be prompted to tick the “Safe to Post” acknowledgment before your manifest will save.

The screenshot shows a web interface for creating a manifest. At the top, there are fields for 'Manifest Date' (17/11/2021) and 'Manifest Name/Reference' (Compliance Mailing). Below these is a table with columns: Destination, Weight (gm), Product, Does Only, Quantity, Unit Price, VAT Amount, Total, and Add Line. The table contains six rows of items. At the bottom right, there are summary totals: Subtotal (£78.45), VAT (£3.71), and Grand Total (£82.16). Below the totals, there is a checkbox labeled 'I confirm all items in this collection are safe to fly' which is checked. At the very bottom, there are four buttons: Cancel, Delete, Save as Draft (highlighted with a red circle), and Save as Final (also highlighted with a red circle).

Destination	Weight (gm)	Product	Does Only	Quantity	Unit Price	VAT Amount	Total	Add Line
United Kingdom	20	Letter		20	£0.67	£0.00	£13.40	- +
Europe (EU)	20	Int Letter	<input checked="" type="checkbox"/>	13	£1.02	£0.00	£13.26	- +
Rest Of World	20	Int Letter	<input checked="" type="checkbox"/>	8	£1.71	£0.00	£13.68	- +
United Kingdom	50	SD 1pm £500		1	£6.70	£0.00	£6.70	- +
United Kingdom	100	PF Express24		1	£18.57	£3.71	£22.28	- +
Italy	200	IntTr Packet		1	£10.84	£0.00	£10.84	- +

Subtotal £78.45
VAT £3.71
Grand Total £82.16

☒ I confirm all items in this collection are safe to fly

Cancel Delete Save as Draft Save as Final

When your manifest is complete, click on “Save as Final”.

Important Note:

Once you have “Saved as Final” your Manifest is committed and cannot be changed. If you spot any errors at this stage, please call Isle of Man Post Office's Finance Department 698410 or email finance@iompost.com.

7.2. Print Manifests

Once you have saved a manifest as final, the manifest details will be displayed, ready to be printed.

Manifest Details

Date: 17 November 2021
Manifest Name/Reference: Compliance Mailing

Dispatch ID	Destination	Product	Weight (g)	Quantity	Unit Price	VAT amount	Total	
CONS-43595	United Kingdom	Letter	20	20	£0.87	£0.00	£13.40	
CONS-43597	Europe Letter - EU	Int Letter	20	13	£1.02	£0.00	£13.26	
CONS-43615	RoW Letter	Int Letter	20	8	£1.71	£0.00	£13.68	
CONS-43616	United Kingdom	SD 1pm £500	50	1	£6.70	£0.00	£6.70	
Recipient Name: Jim Smith 5 Chatham Street, Liverpool, United Kingdom, L69 7ZR 0111 567890								
+	CONS-43617	United Kingdom	PF Express24	100	1	£18.57	£3.71	£22.28
+	CONS-43618	Italy	IntTr Packet	200	1	£10.84	£0.00	£10.84

Sub Total £76.45
VAT £3.71
Grand Total £80.16

[Return](#) [Print All Labels](#) [Print All A4s](#) [Print Final Manifest](#)

At this stage, you can also print all postage labels and customs documentation if that is your preferred option. They can either be printed in one go ("Print All Labels/Print All A4s") or by expanding the relevant manifest lines ('Plus' icon on the left) and clicking on the "Print Label/Print A4s" icons.

To download the completed manifest(s) for printing click on 'Print Final Manifest'.

If the manifest includes Special Delivery - Next Day or Two Day, Tracked 48, International Tracked/Tracked & Signed/ Signed Items and/or Parcelforce items, Click & Dispatch automatically creates the required amount of manifest prints, which must be included with the relevant mail items.

Please note: It is important that you place a full copy of your Click & Dispatch Postage Manifest and (if any) Manifest Extract(s) with your mail, if these are not included the service delivery guarantee could be affected.

You might also wish to print a copy of the postage manifest for your own records and to obtain the signature of the Post Person who collects your mail.

Click & Dispatch Postage Manifest



000003010400000008538

Business Name: **Test Twentyeight**
 Date: **17/11/2021**
 Manifest Name/Reference: **Compliance Mailing PPI: 92815**
 Customer ID: **C092815**

Contact: **Joy Smith**
 Phone: **01624 282828**



Item	Destination	Weight (g)	Product	Qty	Unit Price	VAT Amount	Total	Postcode	Tracking
1	United Kingdom	20	Letter	20	£0.67	£0.00	£13.40	-	
2	Europe Letter - EU	20	Int Letter	13	£1.02	£0.00	£13.26	-	
3	RoW Letter	20	Int Letter	8	£1.71	£0.00	£13.68	-	
4	United Kingdom	50	SD 1pm £500*	1	£6.70	£0.00	£6.70	L69 7ZR	BF900671615GB
5	United Kingdom	100	PF Express24*	1	£18.57	£3.71	£22.28	NG9 6RL	PBMK3315689001
6	Italy	200	IntTr Packet*	1	£10.84	£0.00	£10.84	47900	TT071424475GB
							Subtotal £76.45 VAT £3.71	Grand Total £80.16	

PHG Locker - Manifest Extract



000003010400000008538

Business Name: **Test Twentyeight**
 Date: **17/11/2021**
 Manifest Name/Reference: **Compliance Mailing PPI: 92815**
 Customer ID: **C092815**

Contact: **Joy Smith**
 Phone: **01624888888**



Item	Destination	Weight (g)	Product	Qty	Unit Price	VAT Amount	Total	Postcode	Tracking
1	United Kingdom	50	SD 1pm £500	1	£6.70	£0.00	£6.70	L69 7ZR	 BF900671615GB
2	Italy	200	IntTr Packet	1	£10.84	£0.00	£10.84	47900	 TT071424475GB

Parcelforce - Manifest Extract



000003010400000008538

Business Name: **Test Twentyeight**
 Date: **17/11/2021**
 Manifest Name/Reference: **Compliance Mailing PPI: 92815**
 Customer ID: **C092815**

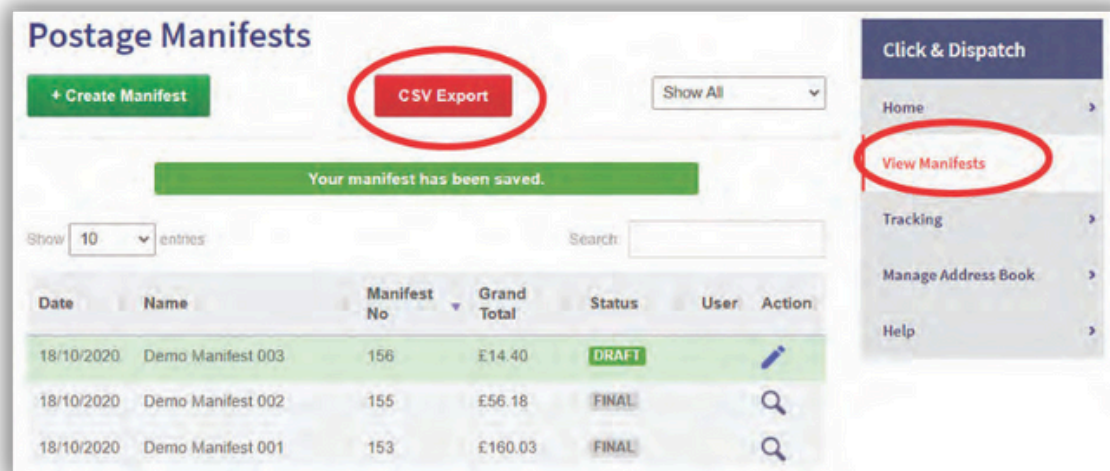
Contact: **Joy Smith**
 Phone: **01624888888**




Item	Destination	Weight (g)	Product	Qty	Unit Price	VAT Amount	Total	Postcode	Tracking
1	United Kingdom	100	PF Express24	1	£18.57	£3.71	£22.28	NG9 6RL	 PBMK3315689001

7.3. View Manifests

You can view historic or pending manifests by selecting the “View Manifest” tab.



By clicking the Pencil icon  you can reopen a draft manifest and continue to build the manifest or make changes to manifest lines.

By clicking the Find button  you will be able to view finalised manifests

The manifest table can be:

- sorted by column headers (click on the column header, a little triangle will appear so you can sort ascending
- or descending)
- filtered to show only 'auto-saved', 'Draft', or 'Final' manifests.
- searched (all information shown in the table, e.g. dates 19/04/2021, manifest name or number, and Grand Total) or investigation. The csv table includes all manifest lines including tracking numbers where provided. exported into a CSV file (CSV Export), providing an overview on your mailing profile and/or it can be used for

8. Prepare your post for collection or drop-off

1. Present your mail correctly to secure quick and efficient processing. Ensure that all postal items either have Postage Paid Impressions or the Click & Dispatch postage labels affixed and ensure that, especially the barcode and recipient address on the Click & Dispatch labels are protected from water damage or smudging (e.g. if you are printing on normal paper protect with transparent adhesive tape).
2. Please apply an 'Airmail sticker', or write 'Airmail' on all standard international items and attach the necessary customs documentation (see section 5 'Customs Declaration') to all other international items.
3. Segregate your items as shown below and either bundle with an elastic band, or for larger volumes of mail put in mail sacks** with the relevant manifest.
4. If possible, sort by size (Letter / Large Letter / Packet), while keeping any items with customs information separately:

Mail Items	Manifest	Label
Standard IOM/UK/EU/ROW and UK/IOM, Local Tracked Services, Tracked 48	Postage Manifest	Standard Mail = PPI stamp/label Tracked 48/Local Tracked Services = C&D generated label
Special Delivery - Next Day*	PHG Locker Manifest	C&D generated label
Special Delivery - Two Day, International tracked, signed, tracked & signed items	PHG Locker Manifest	C&D generated label
Parcelforce	Parcelforce Manifest	C&D generated label

*If you have items to send using Special Delivery - Next Day you must finalise your manifest no later than 1pm on the day you need these items to be dispatched. These items will be collected by 3pm. This is an additional collection and does not affect any existing collection arrangements you have in place.

5.If you have opted for a collection and you would like proof of collection, please print an additional copy of the postage manifest (1st manifest) and present it for the post person to sign.

6.You can also drop your mail items off at an Isle of Man Post Office Counter (see www.iompost.com/services-finder for locations) or

7.In a post or 'meter' box (see www.iompost.com/services-finder for location) if:

- your item(s) is/are small enough to fit through the letter or 'meter' box slot
- you have only selected non tracked services
- you do not require proof of postage.

8.Should you either require a one-off postal collection or regular collections, this can be arranged for an additional fee by contacting Customer Services 664664 or customer.services@iompost.com.

** Please contact Customer Services to request mail sacks (Tel: 664664 or Email: customer.services@iompost.com)

9. Address Book

Frequently used addresses can be saved into the address book, so you can manage your contacts and reduce the need to re-input addresses each time a shipment is sent to a regular customer or contact.

Note: Recipient's addresses are only required for Signed For, Special Delivery, Int. Tracked/Signed or Parcelforce, not for standard national and international services.

You can add new addresses when creating manifest lines (see section 4.5), manually, or import a CSV file.

The screenshot displays the 'Manage Address Book' web interface. At the top, there is a search bar and three main action buttons: 'Add New Address', 'Import Address Book' (highlighted with a red circle), and 'Export Address Book'. Below these are alphabetical navigation tabs from 'a-z' to 'z'. The main area shows a list of saved addresses, each with an 'Edit' and 'Delete' button. The addresses include:

- Box 777 Ltd. Francis Crellin**: 91 Western Road, Brighton, United Kingdom, BN1 2NW, 0123456791
- Busines Ltd Mary Rose**: 48 Main Road, The Town, Tristan Da Cunha, 2200, 0456789456
- Business Name Tom Tailor**: The Main House, On The Corner, 6 Wilkinson Close, Nottingham, United Kingdom, NG9 6RL, 045456456454
- Business Ltd Francesca Tinker**: 5 Main Road, Town, Netherlands Antilles, 2200, 00455454654

An inset window titled 'Import Address Book' is shown in the bottom right. It instructs the user to download a template CSV file and ensure the address book is in this format. The 'DOWNLOAD CSV TEMPLATE' link is highlighted with a red circle. Below this is a file upload section with a 'Choose File' button (showing 'No file chosen') and an 'Upload' button.

Download the CSV template for the required data format and column header s.

Ensure that the information does not extend the maximum character length per field:

Column header:	company_name	recipient_firstname	recipient_lastname	mobile_number	email_address	recipient_address_line_1	recipient_address_line_2	recipient_address_line_3	recipient_town	recipient_country	recipient_postcode	recipient_county
Max characters:	35	25	25	15	50	35	35	35	30	2 digit code*	10	35

*For a full list of country codes please see list within the Click & Dispatch online help section.

Save the addresses as a CSV file, ensuring that the web option encoding is UTF-8. Choose the relevant file and upload into Click & Dispatch.

Please note: As per Data Protection legislation, once you obtain and store customer names and addresses, it becomes your responsibility as the Data Controller. As such, you must obtain the relevant customer consent to use and/or store their information in this way, you are responsible to keep this information accurate and up to date, and to remove this information, once its use has expired.

10. Administration

The administration section allows companies to create Click & Dispatch accounts to best suit their business requirements.

The first user is set up as a Super User with the right to create new users and departments. Admins or users do not have the same permissions.

By default, only one department is created for the Click & Dispatch user accounts. You only need to create additional departments, if you have teams, which
(a)work with different sender/shipper information or
(b)should not see the other team's manifests.

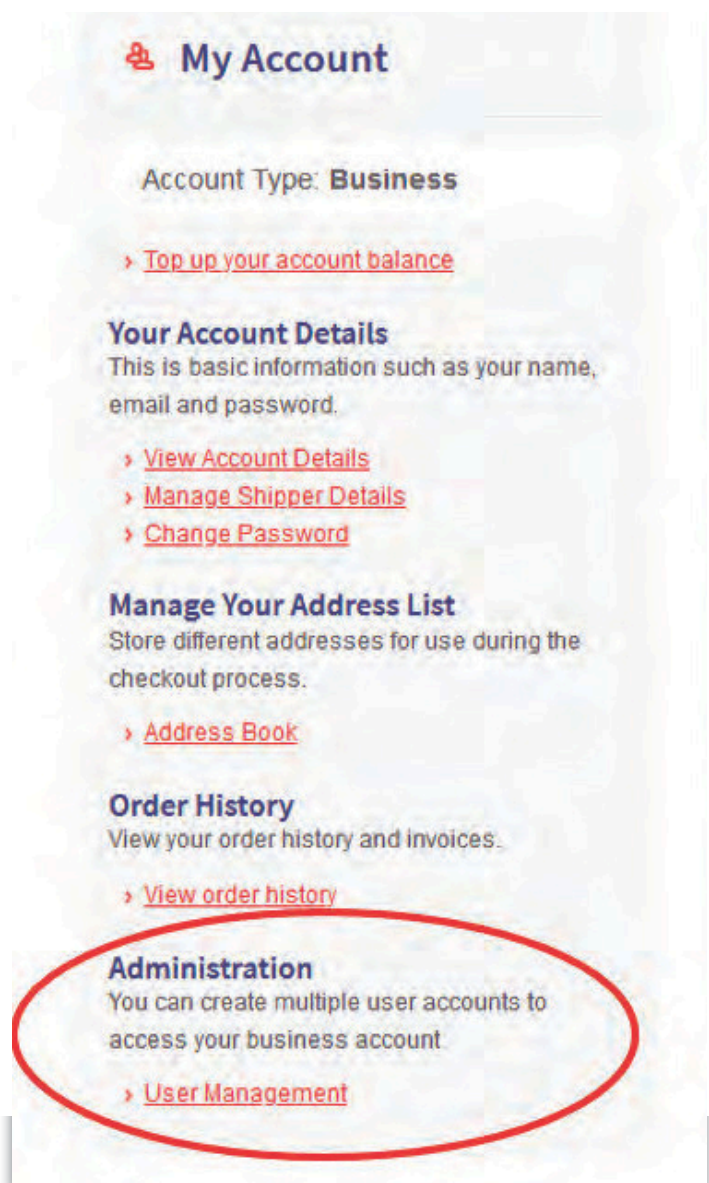
The Super User can create the following user types:

- Additional Super User, e.g. for a General Manager role. Super Users have access to all areas and can see/amend all manifests, they can create, amend, block, and delete departments and/or users. We recommend to create additional Super Users to cover leave or non-availability of the initial Super User.

- Admins, e.g. for a Line Manager, Team Leader role. Admins can only be created if the company has more than the 'default' department (otherwise an Admin becomes a new Super User). Within the Admin's Department, they can create, amend, block, and delete users, but should not create new Admin or account users. They can also create, view, amend, and delete any manifest within their department and the Super Users' manifests.

- Users, e.g. for staff completing the manifests on a daily basis. Users have the full permissions for the processing of manifests and can be grouped by departments with the ability to edit each other's manifests (including the Admin's for that department and the SuperUser's manifests). Users have no administrations rights.

- Accounts, e.g. for audit/compliance or finance staff. They can see all finalised manifests, but have no permissions for the operational use of Click & Dispatch.



Potential Scenarios

1. Only one user needs access.

- No additional departments required
- No additional users required, but we recommend to create an additional Super User to provide cover if necessary.

2. Two staff members working part time

- No additional departments required
- Create two new users and potentially another Super User to provide cover.

3. Multiple staff members working simultaneously

- No additional departments required
 - Create multiple new users and potentially another Super User to provide cover.
- Users can work on each other's manifests one at a time (users need to save 'as draft' to release manifest for other users' access). If users need to access manifests at the same time, they each need to create their own manifest, which means there will be multiple final manifests and print outs for the company per day.

4. Branches in multiple locations, each with multiple users

- Create a department per location
 - Create an admin per location, who can manage the users for that area (Super Users could provide cover for the department's admin, or create multiple admins per department).
- Create multiple users per location. Potentially create another Super User to provide cover.

10.1. Adding a Department

The screenshot shows the 'Department Management' interface. At the top, there are two buttons: 'Add Department' (green) and 'Return to My Account' (grey). Below these, there is a 'Show' dropdown menu set to '10' and a 'Search' input field. A table lists the departments:

Select	Department Name	Default?	Action
<input type="checkbox"/>	Default	✓	
<input type="checkbox"/>	SALES		

Below the table, it says 'Showing 1 to 2 of 2 entries' and has 'Previous', '1', and 'Next' navigation links. There is an 'Apply to selected' dropdown menu currently set to 'Please select'. At the bottom, there is a form to add a new department with a 'Department Name' input field containing 'Mailroom' and 'Save' and 'Close' buttons.

When you click the 'Add Department' button an empty field appears below the department list.

Input the new department's name and press save.

Click the pencil next to the department if you want to change its name. All previously created users and manifests for that department will be linked to the new department name.

You can delete a department by clicking the select box and changing the 'apply to select' drop down list to 'delete'. This will only delete the department, not its users or manifests.

Only the initial Default department is marked as default, other departments cannot be made 'default'. Do not re-name or delete the 'default' department, it is required for the Super User and Account users.

10.2. Adding a User

User Management

You can create additional users to access your Company's Post Office Business Account here. There is granular control over what each user can access and what actions they can perform for greater security. We advise creating an individual user account per person for greater accountability.

+ Add User **Return to My Account**

Show: 10 Search:

entries

Select	Name	Email	Access	Action
<input type="checkbox"/>	F Flower	frflower@manx.net	User	

Showing 1 to 1 of 1 entries Previous 1 Next

Apply to selected

Please select

Select "Add user" for a company without additional Departments, for a form to appear below the user list. Provide the required information and 'save'.

The email address will be the user's username, which is being used to log into Click & Dispatch. This information is unique and can only be used once.

Choose the Access Level from the drop-down menu. And if it is a company with multiple departments, assign a department (there is no department choice provided for account users)

To create a new Super User, please choose 'access all departments'

11. Contingency

In the event of technical issues (system, internet or other issues), please complete a docket (print pdf template) manually.

Please record the reason for completing the manifest docket manually, and ensure this documentation is handed over with your mail.

In preparation for the case that you cannot access the internet at all, please keep a printed template of the mail dockets, the dispatch sheets and keep hold of some of the postage labels you are frequently using.

The pdf templates can be found here: www.iompost.com/ClickandDispatch

12. Appendix

12.1. Purpose of Shipment

Purpose	Explanation / Sample
Gift	Any shipment containing articles to be given as an unsolicited gift, from one private individual to another private individual, which are not being shipped by a business nor consigned to a business.
Personal Effects	Any shipment containing used personal articles such as unaccompanied baggage and household goods being shipped for relocation.
Sample	Any shipment containing articles which are sent free of charge that have been marked or mutilated or otherwise made unsuitable for sale or use except as commercial samples, being shipped with the view of soliciting an order or as a mock-up to furthering an existing order from the foreign entity.
Sold	Merchandise
Documents	Letters, statements, applications and other types of correspondence that are not for resale. Currently not working for Parcelforce items, please choose 'not sold' and enter documents in the item description instead. (Please see documents list below)

12.2. Documents type list

Customs Descriptions for Shipments
Accounting documents
Analysis reports
Application for License
Applications for Loans
Bank Statements
Bid Quotations
Bills of Sale
Birth Certificates
Bonds
Budget Statements/Report
Business Correspondence
Cheques
Claim Files
Closing Statements
Conference Reports
Contracts
Cost Estimates
Court Transcripts
Credit Applications
Customs Documents
Data Sheets
Employment Papers
Escrow Instructions
Export Papers
Financial Statements
Franchise Reports
Hotel Reservations
Immigration Papers
Income Statements
Insurance Documents
Inter-office Memos
Inventory Reports
Invoices
Leases
Legal Documents
Letter of Credit Doc.
Letters and Cards
Loan Documents
Marriage Certificates
Marriage Licenses
Medical Records

Customs Descriptions for Shipments
Memorandums
Office Records
Operating Agreements
Paper
Patent Applications
Permits
Photocopies (PIB docs)
Price Lists
Proposals
Prospectus
Purchase Orders
Quotations
Resumes
Sales Agreements
Sales reports
Shipping Documents
Statistical Data
Stock Information
Tax Papers
Trade Confirmations
Transcripts
Travel Agendas/Itinerary

13. Useful Information

13.1. Post Code Format Links

Isle of Man	www.iompost.com/tools-forms/postcode-finder/
United Kingdom	www.royalmail.com/find-a-postcode
Europe	www.parcelforce.com/help-and-advice/sending/address-formats-europe
Rest of World	www.parcelforce.com/help-and-advice/sending/address-formats-world

13.2. Royal Mail and Parcelforce helpful links

CUSTOMS INFORMATION LINKS

www.postoffice.co.uk/mail/customs-forms

www.gov.uk/government/publications/notice-143-a-guide-for-international-post-users/notice-143-a-guide-for-international-post-users

PLEASE ALSO REFER TO TEXT ON BACK OF CN23S

www.royalmail.com/sites/default/files/CN23.pdf

COUNTRY INFORMATION:

<https://www.royalmail.com/sending/international/country-guides>

<https://www.parcelforce.com/worldwide-directory>

ROYAL MAIL: EXTENDED DELIVERY TIMES AND EXCEPTIONS FOR SPECIAL DELIVERY:

www.royalmail.com/sending/uk/special-delivery

SPECIAL DELIVERY:

www.royalmail.com/sending/uk/special-delivery

PARCELFORCE: EXTENDED DELIVERY TIMES FOR UK ZONES / POSTCODE:

www.parcelforce.com/sites/default/files/3269_PFW%20Zonal%20exceptions_090320-ACCOUNT.pdf

14. Useful Contacts

Click & Dispatch Support

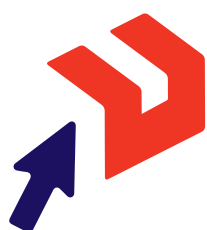
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