



INTERSOFT

Intelligent Shipper

Customer onboarding for
Royal Mail 3PIs User Guide

Version 4.0

PUBLIC

© 2025 **INTERSOFT** Systems and Programming Ltd | All Rights Reserved

UNCONTROLLED WHEN PRINTED

1 Document Control

OWNER	Haroon Shah
APPROVER	Laura Price
CLASSIFICATION	Public
DATE OF ISSUE	29.04.2025
VERSION	4.0
REASON FOR ISSUE/UPDATE	Ready for publication
NEXT REVIEW	29.04.2026
DISTRIBUTION	Ishipper users and customers

VERSION	AUTHOR	SUMMARY OF CHANGES	DATE
V0.1	Laura Lyonette	First draft	03.10.2019
V0.1	Steve Sneath	Reviewed and added comments	23.10.2019
V0.2	Laura Lyonette	Updated with feedback	24.10.2019
V0.2	Lalitha Musnuri	Reviewed and added comments	25.10.2019
V0.2	Beata Brewer	Reviewed and added comments	25.10.2019
V0.3	Laura Lyonette	Added section 7 Delete Customer Account. Updated with review feedback.	25.10.2019
V1.0	Laura Lyonette	Final version for release	28.10.2019
V1.1	Laura Lyonette	Section 5 Royal Mail Account Details updated for changes to OBA Access Code request and approval process.	06.02.2020
V1.1	Weronica Kucharska	Reviewed and added comments	21.02.2020
V2.0	Laura Lyonette	Final version ready for publication	21.02.2020
V3.0	Laura Price	Updated section 4.1.2 to match updated field names displayed in the system.	09.09.20
V4.0	Laura Price	Section 5 - updated number of working days for OBA access code to be provided	18.09.2020
V4.0	Haroon Shah	Added the document cover page and classified the document as per the ISO classification requirements	29.04.2025

Document release:

This document remains the property of Intersoft Systems and Programming Limited. Release to regulatory authorities is permitted as required. Release to other organisations or individuals may only be authorised by company directors.

PUBLIC

Contents

1 Document Control..... 1

2 Table of Figures..... 3

3 Introduction..... 4

4 Create New Customer Account 4

 4.1.1 Add Contacts to Customer Account 7

 4.1.2 Add API Security Details to Customer Account 10

5 Add Royal Mail Account Details to Customer Account..... 11

 5.1 Update Service Contracts..... 14

 5.1.1 Service Contracts Updated Successfully 14

 5.1.2 Service Contracts Not Updated 14

6 Delete Customer Account 15

7 Appendix 1 – Glossary 16

2 Table of Figures

Figure 1: Customers screen, Add Customer button.....	4
Figure 2: Add Customer screen.....	4
Figure 3: Table of fields in Add Customer screen	6
Figure 4: New customer account added	6
Figure 5: New customer account displayed in customers list	7
Figure 6: Add Contact button	7
Figure 7: Add a contact	8
Figure 8: New contact listed in Contacts tab	8
Figure 9: Set as Primary Contact link	8
Figure 10: Primary contact changed	9
Figure 11: Delete contact icon	9
Figure 12: Delete contact confirmation message	9
Figure 13: Contact deleted.....	9
Figure 14: Enter API security details	10
Figure 15: Add customer's Royal Mail account details	11
Figure 16: Request OBA Access Code	12
Figure 17: OBA Access Code Pending	12
Figure 18: Royal Mail Account details saved.....	13
Figure 19: OBA Access Code added to Royal Mail Account details	13
Figure 20: Validate service contracts	14
Figure 21: Unable to validate service contracts error message	14
Figure 22: Customer screen Delete button.....	15
Figure 23: Delete customer account confirmation message	15

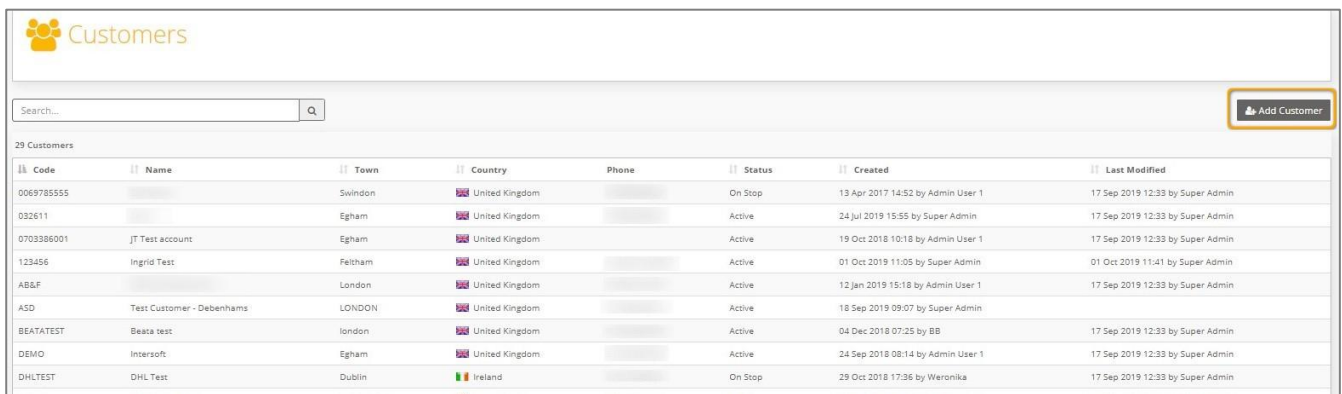
3 Introduction

This manual is intended for Royal Mail Third Party Integrators (3PIs) using Intelligent Shipper. It instructs 3PI System Administrators how to create a customer account and add the customer's Royal Mail account details, so that customers can be onboarded onto the system.

4 Create New Customer Account

When you login to Intelligent Shipper, the Customers screen will be displayed. This screen contains a list of all customer accounts in the system and allows new customers to be added.

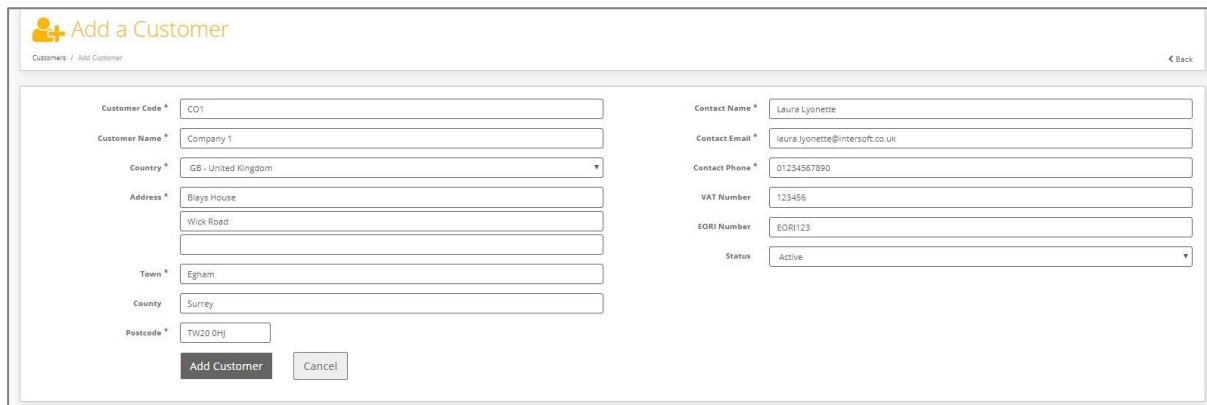
To create a new customer account, click the "Add Customer" button.



Code	Name	Town	Country	Phone	Status	Created	Last Modified
006978555		Swindon	United Kingdom		On Stop	13 Apr 2017 14:52 by Admin User 1	17 Sep 2019 12:33 by Super Admin
032611		Egham	United Kingdom		Active	24 Jul 2019 15:55 by Super Admin	17 Sep 2019 12:33 by Super Admin
0703386001	JT Test account	Egham	United Kingdom		Active	19 Oct 2018 10:18 by Admin User 1	17 Sep 2019 12:33 by Super Admin
123456	Ingrid Test	Feltham	United Kingdom		Active	01 Oct 2019 11:05 by Super Admin	01 Oct 2019 11:41 by Super Admin
AB&F		London	United Kingdom		Active	12 Jan 2019 15:18 by Admin User 1	17 Sep 2019 12:33 by Super Admin
ASD	Test Customer - Debenhams	LONDON	United Kingdom		Active	18 Sep 2019 09:07 by Super Admin	
BEATATEST	Beata test	london	United Kingdom		Active	04 Dec 2018 07:25 by BB	17 Sep 2019 12:33 by Super Admin
DEMO	Intersoft	Egham	United Kingdom		Active	24 Sep 2018 08:14 by Admin User 1	17 Sep 2019 12:33 by Super Admin
DHLTEST	DHL Test	Dublin	Ireland		On Stop	29 Oct 2018 17:36 by Weronika	17 Sep 2019 12:33 by Super Admin

Figure 1: Customers screen, Add Customer button

The Add Customer screen will open and will contain the fields shown in figure 2 below.



Add a Customer

Customer Code *

Customer Name *

Country *

Address *

Town *

County

Postcode *

Contact Name *

Contact Email *

Contact Phone *

VAT Number

EORI Number

Status

Figure 2: Add Customer screen

Populate the fields with the customer's details. The fields are described in the table below:

Field Name	Description	Optionality (M/C/O)	Validation Rules
Customer code	Define a unique identifying code for the customer. This will be displayed in the system alongside customer name	Mandatory	Maximum 10 alphanumeric characters

Field Name	Description	Optionality (M/C/O)	Validation Rules
	everywhere customer details are displayed.		
Customer Name	The customer's name.	Mandatory	Maximum 35 alphanumeric characters.
Country	Select the country the customer is based in from the drop-down list.	Mandatory	Selection from drop-down list.
Address	Enter the customer's main shipping address.	Mandatory	Maximum 35 alphanumeric characters per field.
Town	Enter the town of the customer's main shipping address.	Mandatory	Maximum 30 alphanumeric characters per field.
County	Enter the county of the customer's main shipping address.	Optional	Maximum 50 alphanumeric characters
Postcode	Enter the postcode of the customer's main shipping address.	Mandatory	Maximum 10 alphanumeric characters. Must be a valid UK postcode.
Contact Name	Enter the contact name of the primary contact at the customer organisation. The primary contact details may be used as the shipper details, if shipper information is not provided when a shipment is created.	Mandatory	Maximum 100 alphanumeric characters
Contact Email	Enter the email address of the primary contact at the customer organisation.	Mandatory	Must be in a valid email format e.g. name@customer.co.uk
Contact Phone	Enter the phone number of the primary contact at the customer organisation.	Mandatory	Maximum 20 numeric characters
VAT Number	Enter the customer's VAT Number known. If entered this will be displayed on customs documents generated for the customer account. If you do not know the VAT number then this can be left blank.	Optional	Maximum 15 alphanumeric characters
EORI Number	Enter the customer's EORI (Economic Operations Registration Identification) Number if known. If entered this will be displayed on customs documents generated for the customer account. If you do not know the VAT number then this can be left blank.	Optional	Maximum 15 alphanumeric characters
Status	Select the customer's account status from the following drop-down list: <ul style="list-style-type: none"> Active – the customer's account is activated and ready to use. 	Optional	Selection from drop-down list.

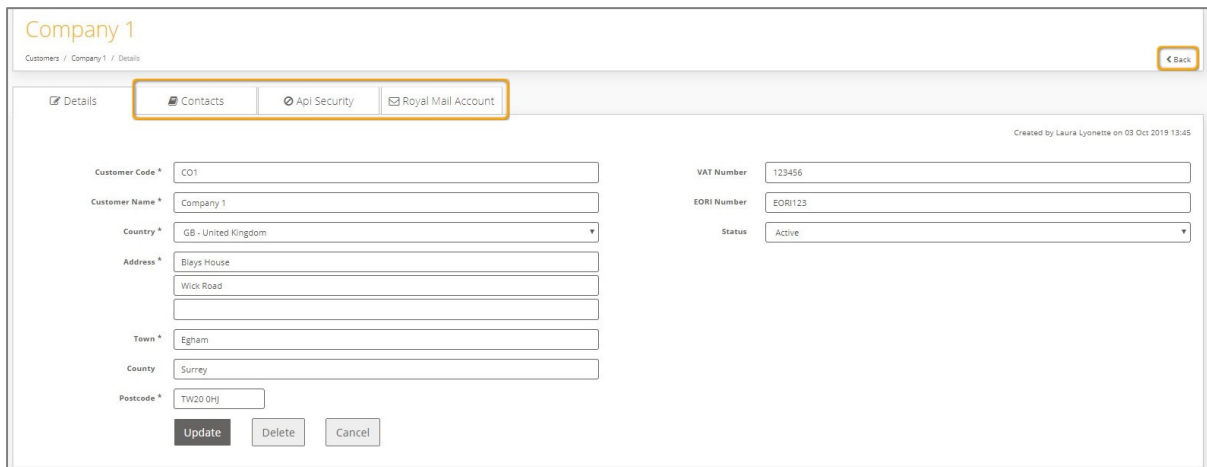
Field Name	Description	Optionality (M/C/O)	Validation Rules
	<p>Users of the customer account can login and create shipments.</p> <ul style="list-style-type: none"> On Stop – the customer’s account is on hold. Users of the customer account will not be able to login to the system. The account can be taken off hold by editing the customer account and selecting a different option from the list. Closed – the customer no longer has a valid contract to use Intelligent Shipper. Users of the customer account will not be able to login to the system. The customer account can be re-activated by editing the customer account and selecting “Active” from the list. 		

Figure 3: Table of fields in Add Customer screen

Once the screen has been populated with the customer’s details, click the “Add Customer” button to create the customer account.

The customer account will be created and the following additional tabs will be displayed:

- Contacts - add contacts to the customer account
- API Security - for API customers, enter the credentials the customer will use to connect to the API
- Royal Mail Account - add the customer’s Royal Mail account details. This will validate the customer's account details against Royal Mail's OBA billing system and return a list of the Royal Mail services available to the customer.



Company 1
Customers / Company 1 / Details

Created by Laura Lyonette on 03 Oct 2019 13:45

Details | Contacts | API Security | Royal Mail Account

Customer Code * CO1

Customer Name * Company 1

Country * GB - United Kingdom

Address *
Blays House
Wick Road

Town * Egham

County Surrey

Postcode * TW20 0HJ

VAT Number 123456

EORI Number EORI123

Status Active

Update Delete Cancel

Figure 4: New customer account added

Select the “Back” link on the customer account to return to the Customers screen. The new customer account will be listed.

Code	Name	Town	Country	Phone	Status	Created	Last Modified
006978555		Swindon	United Kingdom	0799999999	On Stop	13 Apr 2017 14:52 by Admin User 1	17 Sep 2019 12:33 by Super Admin
032611		Egham	United Kingdom	07488556922	Active	24 Jul 2019 15:35 by Super Admin	17 Sep 2019 12:33 by Super Admin
0703386001	JT Test account	Egham	United Kingdom		Active	19 Oct 2018 10:18 by Admin User 1	17 Sep 2019 12:33 by Super Admin
123456	Ingrid Test	Feltham	United Kingdom	+447477144307	Active	01 Oct 2019 11:05 by Super Admin	01 Oct 2019 11:41 by Super Admin
AB&F		London	United Kingdom	01784 7771 61	Active	12 Jan 2019 15:18 by Admin User 1	17 Sep 2019 12:33 by Super Admin
ASD	Test Customer - Debenhams	LONDON	United Kingdom	01784556223	Active	18 Sep 2019 09:07 by Super Admin	
BEATATEST	Beata test	London	United Kingdom	01753 687979	Active	04 Dec 2018 07:25 by BB	17 Sep 2019 12:33 by Super Admin
CO1	Company 1	Egham	United Kingdom	01234567890	Active	03 Oct 2019 13:45 by Laura Lyonette	
DEMO	Intersoft	Egham	United Kingdom	01753 687979	Active	24 Sep 2018 08:14 by Admin User 1	17 Sep 2019 12:33 by Super Admin
DHLTEST	DHL Test	Dublin	Ireland	07577448233	On Stop	29 Oct 2018 17:36 by Weronika	17 Sep 2019 12:33 by Super Admin
DPDNL	DPD Netherlands	Amsterdam	Netherlands	07488556922	Active	11 Mar 2019 11:06 by Admin User 1	17 Sep 2019 12:33 by Super Admin

Figure 5: New customer account displayed in customers list

To edit the customer details, select that customer row in the list and the Edit Customer screen will open.

4.1.1 Add Contacts to Customer Account

Once the customer account has been created, you can add more contacts to the customer account.

To add contacts to the customer account, select the Contacts tab. This will display the primary contact details that were entered when the customer account was created. To add more contacts to the customer account, click the "Add Contacts" button.

Name	Email	Phone	Description	Created	Last Modified
Laura Lyonette	laura.lyonette@intersoft.co.uk	01234567890	Primary Contact	03 Oct 2019 12:45 by Laura Lyonette	

Figure 6: Add Contact button

The screen will update to show contact information fields.

To add a contact to the customer account contact:

1. Enter the contact's name. This is a mandatory field.
2. Enter the contact's phone number – this optional for all non-primary contacts.
3. Enter the contact's email address – this is optional for all non-primary contacts.
4. Enter a description for the contact. This is a mandatory field.
5. Click the "Add Contact" button.

1

Name *

2

Phone

3

Email

4

Description *

John Smith

Secondary Contact

Add Contact

Cancel

5

Name	Email	Phone	Description	Created	Last Modified
Laura Lyonnerte	laura.lyonnerte@intersoft.co.uk	01784777170	Primary Contact	03 Dec 2018 17:42 by Laura Lyonnerte	

Figure 7: Add a contact

The contact will be saved and listed in the Contacts tab.
To add another contact to the customer account, click "Add Contact" again and enter the contact details.

Add Contact

Name	Email	Phone	Description	Created	Last Modified
John Smith			Secondary Contact	03 Dec 2018 17:50 by Laura Lyonnerte	
Laura Lyonnerte	laura.lyonnerte@intersoft.co.uk	01784777170	Primary Contact	03 Dec 2018 17:42 by Laura Lyonnerte	

Figure 8: New contact listed in Contacts tab

The Contacts tab will list all contacts that have been added for the customer account.

4.1.1.1 Changing the Primary Contact

The primary contact can be changed to any contact that has all fields entered. To change the primary contact to a different contact:

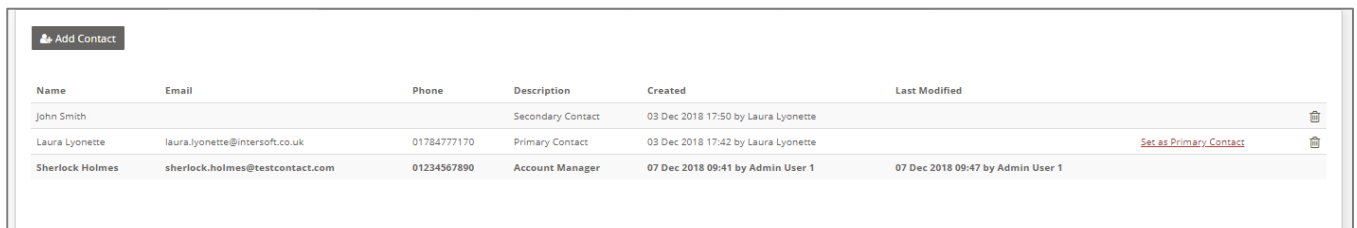
- 1. Ensure the contact you want to set as the primary contact has all fields entered.
- 2. Select the "Set as Primary Contact" link for the contact

Add Contact

Name	Email	Phone	Description	Created	Last Modified
John Smith			Secondary Contact	03 Dec 2018 17:50 by Laura Lyonnerte	
Laura Lyonnerte	laura.lyonnerte@intersoft.co.uk	01784777170	Primary Contact	03 Dec 2018 17:42 by Laura Lyonnerte	
Sherlock Holmes	sherlock.holmes@testcontact.com	01234567890	Account Manager	07 Dec 2018 09:41 by Admin User 1	<div>Set as Primary Contact</div>

Figure 9: Set as Primary Contact link

- 3. That contact will then be set as the primary contact. The "Select Primary Contact" link will be removed from that contact and displayed against all other contacts that have all fields entered, and so could be set as the primary contact.



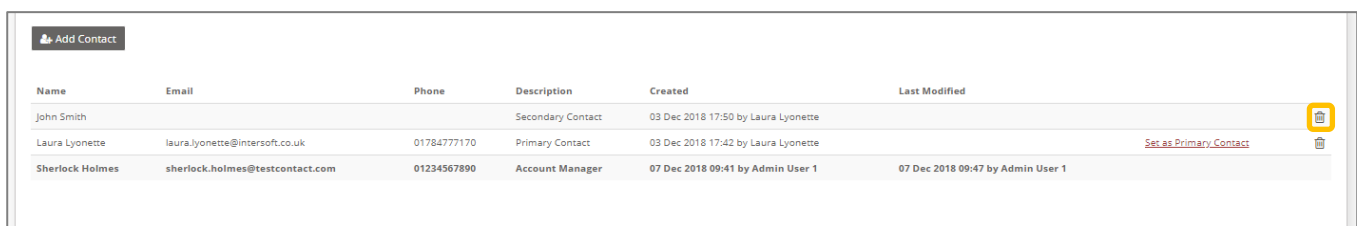
Name	Email	Phone	Description	Created	Last Modified
John Smith			Secondary Contact	03 Dec 2018 17:50 by Laura Lyonette	
Laura Lyonette	laura.lyonette@intersoft.co.uk	01784777170	Primary Contact	03 Dec 2018 17:42 by Laura Lyonette	Set as Primary Contact
Sherlock Holmes	sherlock.holmes@testcontact.com	01234567890	Account Manager	07 Dec 2018 09:41 by Admin User 1	07 Dec 2018 09:47 by Admin User 1

Figure 10: Primary contact changed

4.1.1.2 Deleting Contacts

Contacts that are not the primary contact can be deleted from the customer account. To delete a contact from the customer account:

1. Select the delete icon for that contact.



Name	Email	Phone	Description	Created	Last Modified
John Smith			Secondary Contact	03 Dec 2018 17:50 by Laura Lyonette	
Laura Lyonette	laura.lyonette@intersoft.co.uk	01784777170	Primary Contact	03 Dec 2018 17:42 by Laura Lyonette	Set as Primary Contact
Sherlock Holmes	sherlock.holmes@testcontact.com	01234567890	Account Manager	07 Dec 2018 09:41 by Admin User 1	07 Dec 2018 09:47 by Admin User 1

Figure 11: Delete contact icon

2. A confirmation message will be displayed prompting you to confirm you want to delete the contact. Select the “Delete” button to continue and delete the contact.

NOTE: Selecting the “Cancel” button will cancel the message without deleting the contact.

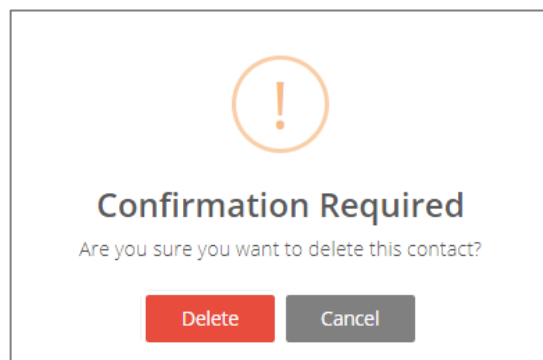
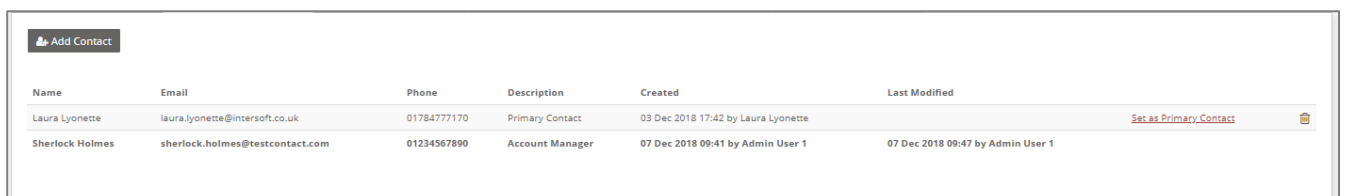


Figure 12: Delete contact confirmation message

3. The contact will then be removed from the contacts list.



Name	Email	Phone	Description	Created	Last Modified
Laura Lyonette	laura.lyonette@intersoft.co.uk	01784777170	Primary Contact	03 Dec 2018 17:42 by Laura Lyonette	Set as Primary Contact
Sherlock Holmes	sherlock.holmes@testcontact.com	01234567890	Account Manager	07 Dec 2018 09:41 by Admin User 1	07 Dec 2018 09:47 by Admin User 1

Figure 13: Contact deleted

NOTE: It is not possible for the primary contact to be deleted.

4.1.2 Add API Security Details to Customer Account

The credentials the customer will use to access the API need to be added to the customer account.

To add API details to the customer account, select the API Security tab and enter the following information.

1. Define a 10-character application ID. The customer will use this in the 'Application ID' field when sending API requests.
2. Define a 10-character user ID. The customer will use this in the 'User ID' field when sending API requests.
3. Define a 10-character password. The customer will use this in the 'Password' field when sending API requests.
4. Click the Update button. This will save the API details against the customer account, and these details will be used to authenticate the customer account when the customer connects to the API.

The screenshot shows a web interface with a top navigation bar containing five tabs: 'Details', 'Contacts', 'Api Security' (which is selected and highlighted), 'Services', and 'Users'. Below the tabs, the main content area displays the 'Api Security' form. The form includes three input fields: 'Application ID *' with the value 'INTERSOFT', 'User ID *' with the value 'Intersoft1', and 'Password *' with the value 'Testing@1'. Below these fields are two buttons: 'Update' and 'Cancel'. In the top right corner of the form area, there is a text label 'Created by Admin User 1 on 20 F'.

Figure 14: Enter API security details

5 Add Royal Mail Account Details to Customer Account

Once the customer account has been created the customer's Royal Mail account details need to be added to their Intelligent Shipper customer account.

NOTE: Email notification updates will be sent during the Royal Mail account onboarding process. These emails will be sent to the email address of the Intelligent Shipper user account that submits the Royal Mail onboarding request. Therefore, before adding the customer's Royal Mail account details, ensure the email address of the account you are logged in under is the email address you want to receive notifications to.

To add Royal Mail account details to a customer account, select the "Royal Mail Account" tab in the Customer screen.

The screenshot shows the 'Royal Mail Account' tab in the Intelligent Shipper system. The form contains the following fields and elements:

- Royal Mail Account Number ***: Text input field with value '0069786001'.
- Posting Location ***: Text input field with value '9000257151'.
- OBA Access Code ***: Text input field with value '7001'. A button labeled 'Request OBA Access Code' is to the right.
- Receiving Hub ***: Dropdown menu with value '002598 - Aberdeen Mail Centre (ZEAB)'.
- Return Name**: Text input field.
- Return Country**: Dropdown menu with value '-- Select Country --'.
- Return Address**: Three stacked text input fields.
- Return Town**: Text input field.
- Return County**: Text input field.
- Return Postcode**: Text input field.
- Add Royal Mail Account**: Button at the bottom.

Below the 'Royal Mail Account Number' field, there is a note: 'Every Royal Mail Account has at least one Posting Location associated with it. You will have the opportunity to add further posting locations once the Royal Mail Account has been added.'

Below the 'Receiving Hub' field, there is a note: 'If a return address is not added for this posting location, the shipment's shipper's address will be used.'

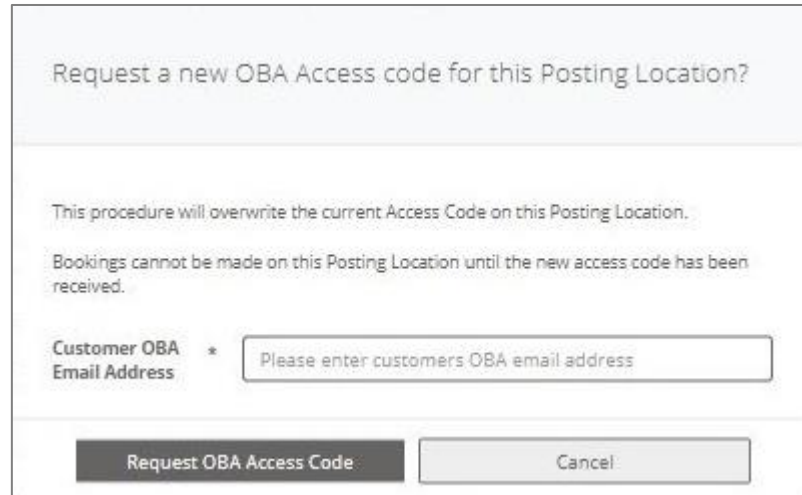
Figure 15: Add customer's Royal Mail account details

To setup the customer's Royal Mail account details:

1. Enter the customer's Royal Mail account number. This must be 10 digits long- if the customer's account number is not 10 digits then add 0s at the front of the account number to increase the length to 10 digits.
2. Enter the posting location number of the customer's main posting location. Additional posting locations can be added once the customer's Royal Mail account details have been setup.
3. The OBA Access Code for the posting location will need to be requested from Royal Mail. To do this, select the "Request OBA Access Code" button. A confirmation window will be displayed prompting you to enter the customer's OBA email address.

4. Enter the email address that was used when the posting location was registered with Royal Mail and click the "Request OBA Access Code" button.

NOTE: If you click the "Cancel" button the confirmation message will be cancelled and the OBA Access Code will not be requested.



Request a new OBA Access code for this Posting Location?

This procedure will overwrite the current Access Code on this Posting Location.

Bookings cannot be made on this Posting Location until the new access code has been received.

Customer OBA Email Address *

Request OBA Access Code **Cancel**

Figure 16: Request OBA Access Code

5. The OBA Access Code field will be updated with the text "PENDING" and the current date.



Details Contacts Api Security Services Users **Royal Mail Account**

If you don't want this customer to use the main Royal Mail Account, or your system doesn't have a main Royal Mail Account, add a Royal Mail Account here. This is the one that will then be used for this customer. If there is a main Royal Mail Account it is maintained through the [Royal Mail Label Integration](#).

Royal Mail Account Number *

Every Royal Mail Account has at least one Posting Location associated with it. You will have the opportunity to add further posting locations once the Royal Mail Account has been added.

Posting Location *

OBA Access Code *

Receiving Hub *

Figure 17: OBA Access Code Pending

6. Select the Royal Mail hub the customer will be sending their shipments to from the drop-down list.
 7. If the customer's return address is different from their shipping address, then enter the returns address details. If a returns address is not entered then the customer's shipping address will be used for returns, or if the customer is using the system via API, they can specify a returns address in the Shipper section of the API request.
 8. Once all details have been entered, select the "Add Royal Mail Account" button. This will save the customer's Royal Mail account details and the screen will update. The OBA Access Code will be set to 'Pending' and the customer's Royal Mail Account Status will be set to 'Disabled'.
- NOTE:** It will not be possible to create shipments for the Royal Mail account until the Access Code has been entered.

If you don't want this customer to use the main Royal Mail Account, or your system doesn't have a main Royal Mail Account, add a Royal Mail Account here. This is the one that will then be used for this customer.
If there is a main Royal Mail Account it is maintained through the [Royal Mail Label Integration](#).

Royal Mail Account Status: Disabled

Royal Mail Account Number *: 0069786901

Update Delete

Posting Locations

Posting Location	OBA Access Code	Receiving Hub	Return Name	Return Address
333333333	PENDING	002598		

Add Posting Location

Figure 18: Royal Mail Account details saved

- The Royal Mail OBA team will be notified the Access Code has been requested. You will receive an email detailing the next steps in the process (this will be sent to the email address of the user account you are logged in under).
- Royal Mail will add the Access Code to customer account within 2-5 working days. Once this is done, the OBA Access Code field will be updated to display the correct Access Code and the Royal Mail Account Status will be changed to 'Enabled'. You will receive an email informing you the customer's Royal Mail account has been activated (this will be sent to the email address of the user account you were logged in under when the access code request was submitted).

If you don't want this customer to use the main Royal Mail Account, or your system doesn't have a main Royal Mail Account, add a Royal Mail Account here. This is the one that will then be used for this customer.
If there is a main Royal Mail Account it is maintained through the [Royal Mail Label Integration](#).

Royal Mail Account Status: Enabled

Royal Mail Account Number *: 0069786901

Update Delete

Posting Locations

Posting Location	OBA Access Code	Receiving Hub	Return Name	Return Address
333333333	369258147	002598		

Add Posting Location

Figure 19: OBA Access Code added to Royal Mail Account details

NOTE: The customer's Royal Mail account will be checked against OBA once every 24 hours, and if the customer's account is not active in OBA then Royal Mail Account Status will be changed to back 'Disabled'. It will not be possible to create Royal Mail shipments for the account whilst the account whilst the Royal Mail Account Status is 'Disabled'.

- Once the Access Code has been added, the service contracts available for the customer's Royal Mail account will need to be validated against OBA – this will be done automatically once every 24 hours, or can be done manually by following the instructions in the [Update Service Contracts](#) section.

NOTE: If a customer's Royal Mail account number or Posting Location number changes, their Royal Mail account will need to be deleted from their Intelligent Shipper customer account and the above steps repeated for the new account or Posting Location details. This is to ensure the account details in Intelligent Shipper match those in OBA, and the customer is not prevented from creating Royal Mail labels when the automated OBA validation checks are run.

5.1 Update Service Contracts

Once a customer's Royal Mail account details have been added to their customer record, the customer's service contracts list can be updated by validating the customer's service contracts against OBA.

To update service contracts for a customer:

1. Select Maintenance > Customers.
2. Select the customer from the customers list to open the Edit Customer screen, then select the Royal Mail Account tab.
3. Click the "Validate Service Contract" button.

Details | **Contacts** | **Api Security** | **Royal Mail Account**

Royal Mail Account Number * 0069785000
 [Update] [Delete]

Posting Locations [Add Posting Location]

Posting Location	OBA Access Code	Receiving Hub	Return Name	Return Address
9000257152	70001	002598		Posting Location Stanwell Moor, Middlesex TW19 6BS

Service Contracts [Validate Service Contract]

Service Code	Service Level	Contract Code
BF1	01	Q121
BF1	09	Q54321
BF2	09	Q54321
BF2	01	Q121
BF7	01	Q121
BF7	09	Q54321

Figure 20: Validate service contracts

5.1.1 Service Contracts Updated Successfully

Intelligent Shipper will check the service contracts assigned to the customer in OBA and update the Service Contracts list. Any new services added to the customer account in OBA will be added to the Service Contracts list, and any service contracts that are no longer assigned to the customer in OBA will be removed from the list.

5.1.2 Service Contracts Not Updated

If the customer's service contracts cannot be validated against OBA, e.g. if the customer's Royal Mail account is on stop, then an error message will be displayed in the top right corner of the screen. The customer will need to contact Royal Mail Finance to discuss their account.

INTELLIGENT SHIPPER SystemTest Environment - Version 1.31.1.171-PreRelease

Customers / Perfect Moment / Royal Mail Account [Back]

Details | **Contacts** | **Api Security** | **Royal Mail Account**

Royal Mail Account Number * 0505534000
 [Update] [Delete]

Posting Locations [Add Posting Location]

Posting Location	OBA Access Code	Receiving Hub	Return Name	Return Address
9000482177	0225	002598	Alipor Cargo Services(PL)	Seico House 13 Hayes Road Southall UB2 5ND

Service Contracts [Validate Service Contract]

Service Code	Service Level	Contract Code
TSN	01	TSN12345
TSS	01	TSS12345

Error: Your Account is currently unavailable. please contact Royal Mail Finance.

Figure 21: Unable to validate service contracts error message

6 Delete Customer Account

If a customer account is no longer needed it can be deleted from Intelligent Shipper.

1. To delete a customer account, open the Edit Customer screen for that customer and select the 'Delete' button.

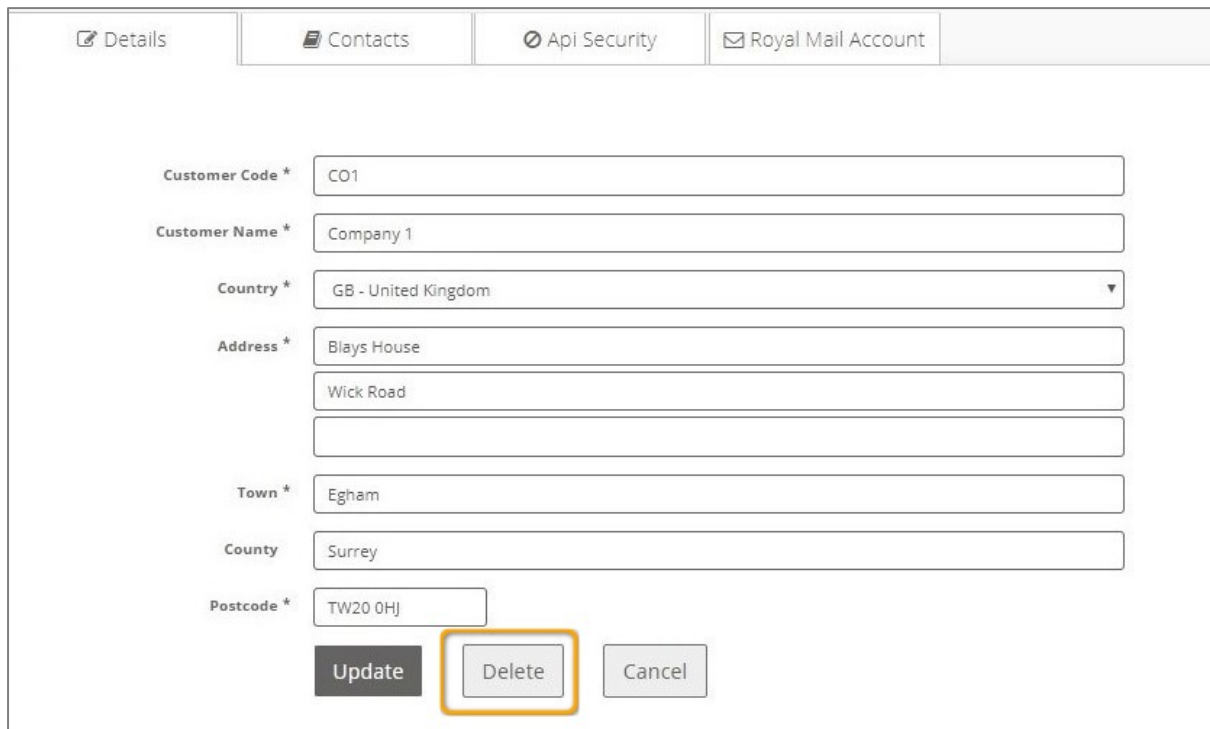


Figure 22: Customer screen Delete button

2. You will be prompted to confirm whether you want to delete the customer account.

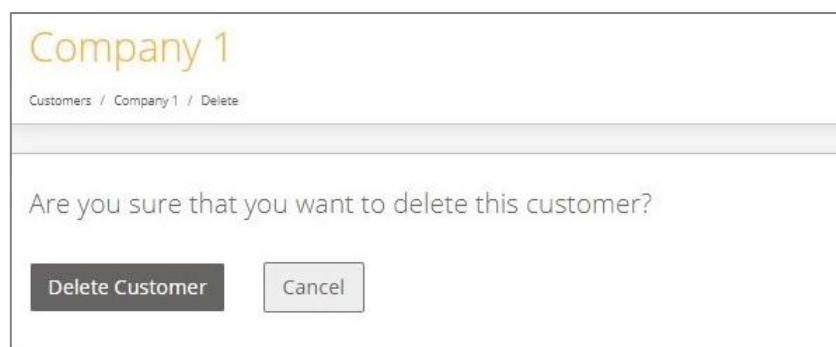


Figure 23: Delete customer account confirmation message

3. To continue and delete the account, select the 'Delete Customer' button. This will remove the customer account from the system.
4. If the 'Cancel' button is selected, the message will be dismissed and the customer account will not be deleted.

7 Appendix 1 – Glossary

Term	Definition
OBA	Online Billing Account - Royal Mail's billing platform