USER GUIDE

Shipping Alerts & Reports

Shipping Alerts & Reports

CONTENTS

INTRODUCTION

Get near real-time delivery updates and reports

Shipping Alerts & Reports app helps retailers, wholesalers and professional services firms at every stage of shipping by –

- Tracking all shipments at one place in near real time
- Providing unparalleled customer experience with higher accuracy on delivery timelines
- Providing specialized insights to make shipments cost efficient and profitable

Please note: *Pitney Bowes does not charge money for accessing any services within the Shipping Alerts & Reports app.*

APPLICATION FLOW

1. ONBOARDING – This directs users to the launch page with terms and conditions

2. GETTING STARTED –Information about the capabilities of the application

3. SHIPMENT STATUS – Information on status of the shipments

4. SERVICE INSIGHTS – Information about the Service Cost, Delivery Days and Breached Delivery Days

5. ALERTS– The app provides high, medium and low priority alerts for your shipments.

6. TICKET CREATION- The app provides automatic ticket creation for your queries using Freshdesk Companion app

STEP 1: ONBOARDING FOR FIRST TIME USERS

Click on the Shipping Alerts & Reports plug-in icon to get started. You will be directly logged in to Shipping Alerts & Reports. If you are not logged in automatically, you will be directed to a login page to enter your Pitney Bowes account ID and password.

STEP 2: DASHBOARD VIEW FOR REGULAR USERS

Upon launching the Shipping Alerts & Reports application, you will be taken directly to the dashboard screen. The screen provides quick access buttons to the key capabilities of the application.
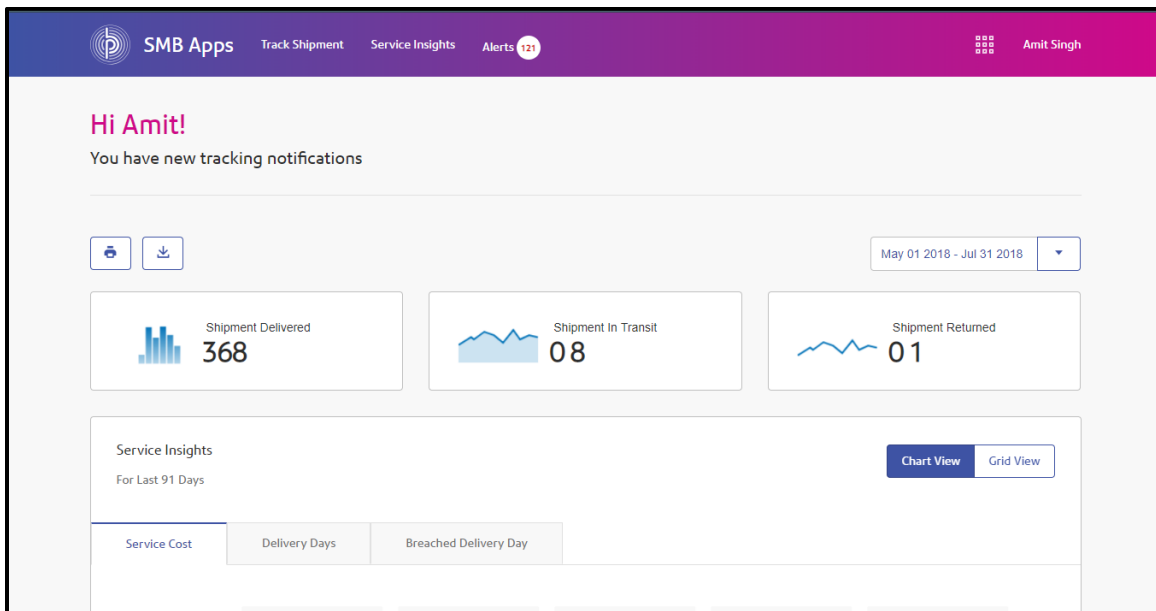
On the Dashboard, you can view the count of shipments in transit, delivered and returned. On scrolling down you can also view shipment status, service insights and alerts.

Shipping Alerts & Reports

pitney bowes
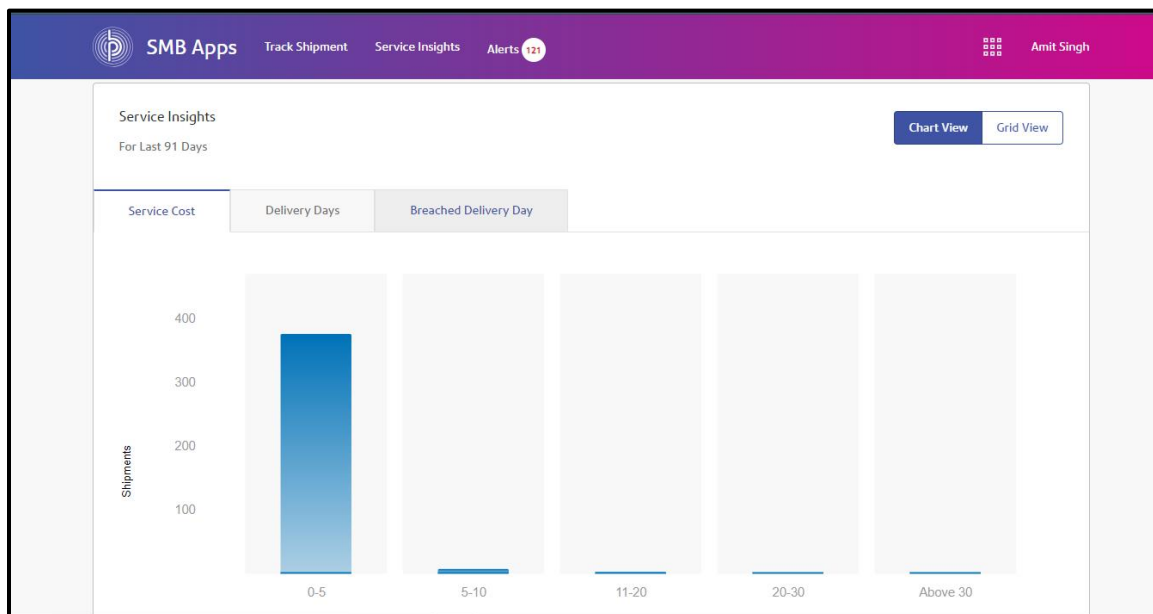
SMB Apps   Track Shipment   Service Insights   Alerts 121   Amit Singh

Alerts   View All

Customer address validation failed. Low   Sun Aug 05 02:22:17 AM
Address is a multi-storey building but has a missing apartment number.
Transaction Ref. 1286846A9F3948088696A0EFCA25EE2D

Customer address validation failed. Low   Tue Jul 03 02:54:52 AM
The building number was validated but the unit number was missing from input.
Transaction Ref. 9C53D988B2524CAB89C1A3511FED7FF0

Package shipping hampered. Medium   Sun Jul 01 08:01:41 AM
Package has been returned to sender. No Such Number
Transaction Ref. 0400CC8722C748048BF8F69D60B9F44C

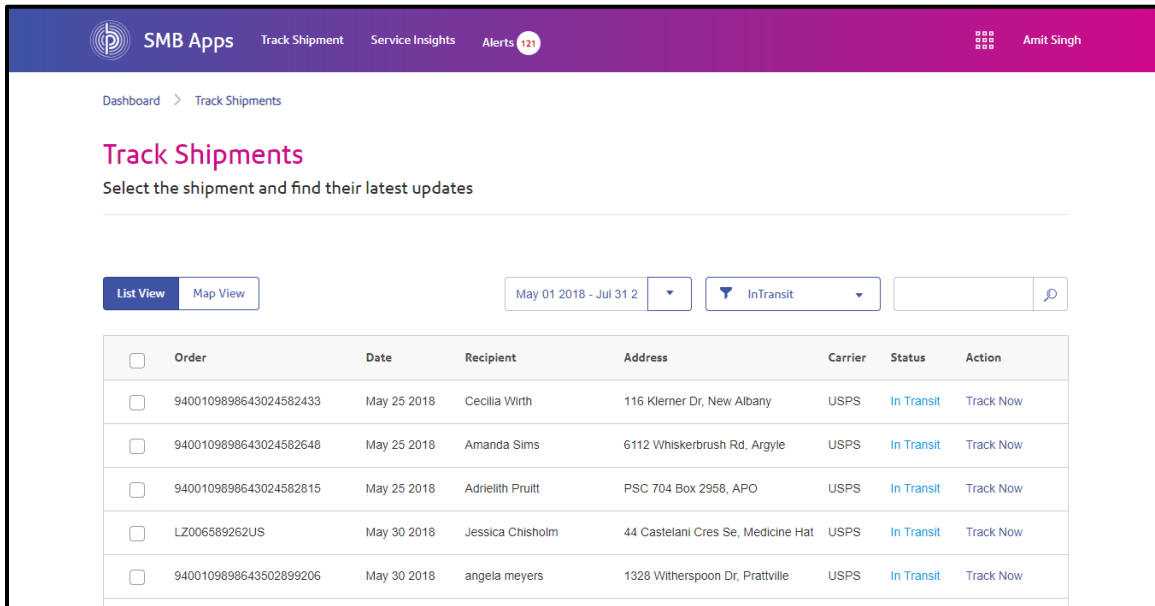SMB Apps   Track Shipment   Service Insights   Alerts 121   Amit Singh

All Shipments Status ⊙   View All
Last 91 Days

Order	Date	Recipient	Address	Carrier	Status	Action
9400109898643024582433	May 25 2018	Cecilia Wirth	116 Klerner Dr, New Albany	USPS	In Transit	Track Now
9400109898643024582648	May 25 2018	Amanda Sims	6112 Whiskerbrush Rd, Argyle	USPS	In Transit	Track Now
9400109898643024582815	May 25 2018	Adrielith Pruitt	PSC 704 Box 2958, APO	USPS	In Transit	Track Now
LZ006589262US	May 30 2018	Jessica Chisholm	44 Castelani Cres Se, Medicine Hat	USPS	In Transit	Track Now
9400109898643502899206	May 30 2018	angela meyers	1328 Witherspoon Dr, Prattville	USPS	In Transit	Track Now
LZ006625999US	Jun 05 2018	Victoria Gaivoronskaia	2/3000 Valentino Crt, Kelowna	USPS	In Transit	Track Now
9405509898643504149081	Jun 12 2018	Ashley Sharp	605 W Main St, Charlottesvle	USPS	In Transit	Track Now
9400109898643505526536	Jun 25 2018	Kimberly Somers	3653 River Rd, Cincinnati	USPS	In Transit	Track Now

STEP 3: CHECK THE SHIPMENT STATUS

Click on 'Track Shipments' tab on the Dashboard to get the status of the shipments that are Delivered, In Transit and Returned
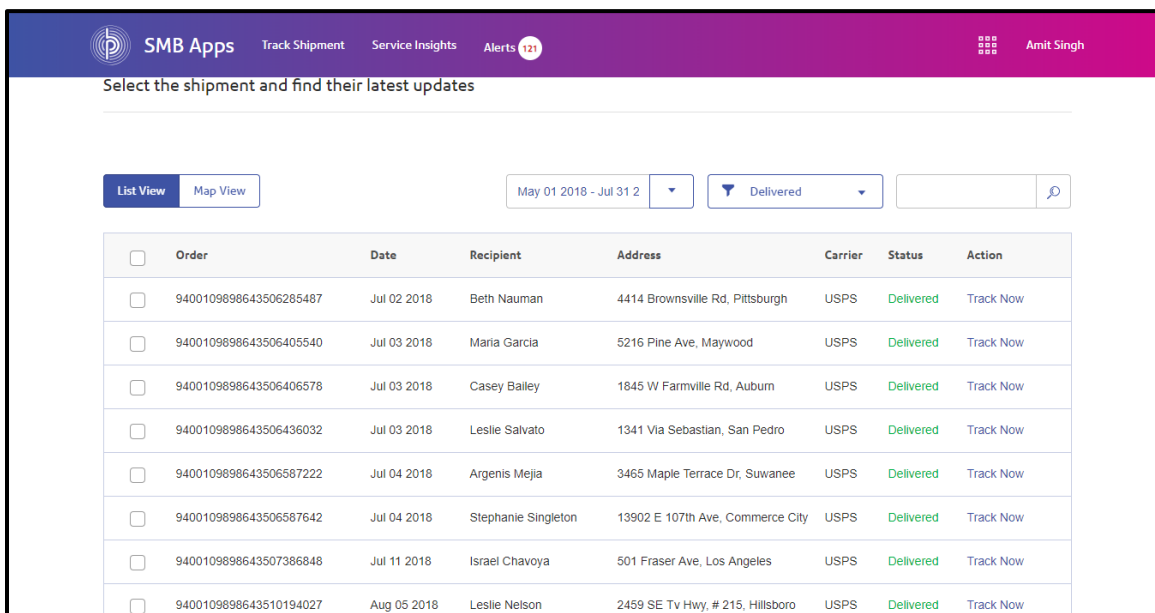

You can filter the shipments by date by selecting the time range.

3.1: DELIVERED
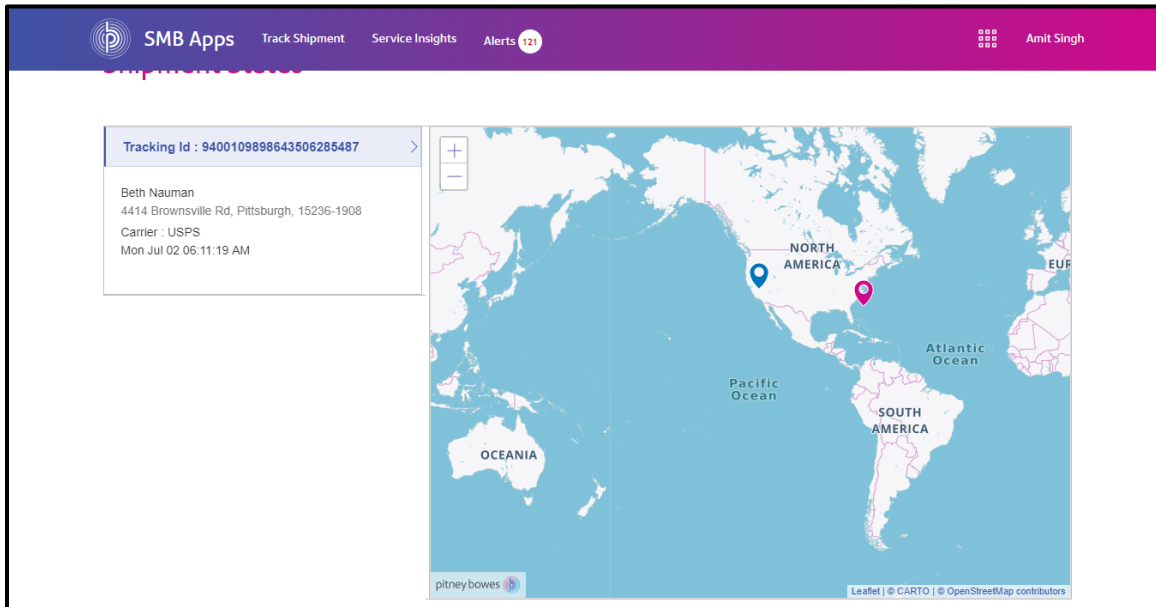
To view delivered shipments click on the filter icon provided on the screen. Select 'Shipments Delivered' to view all delivered shipments
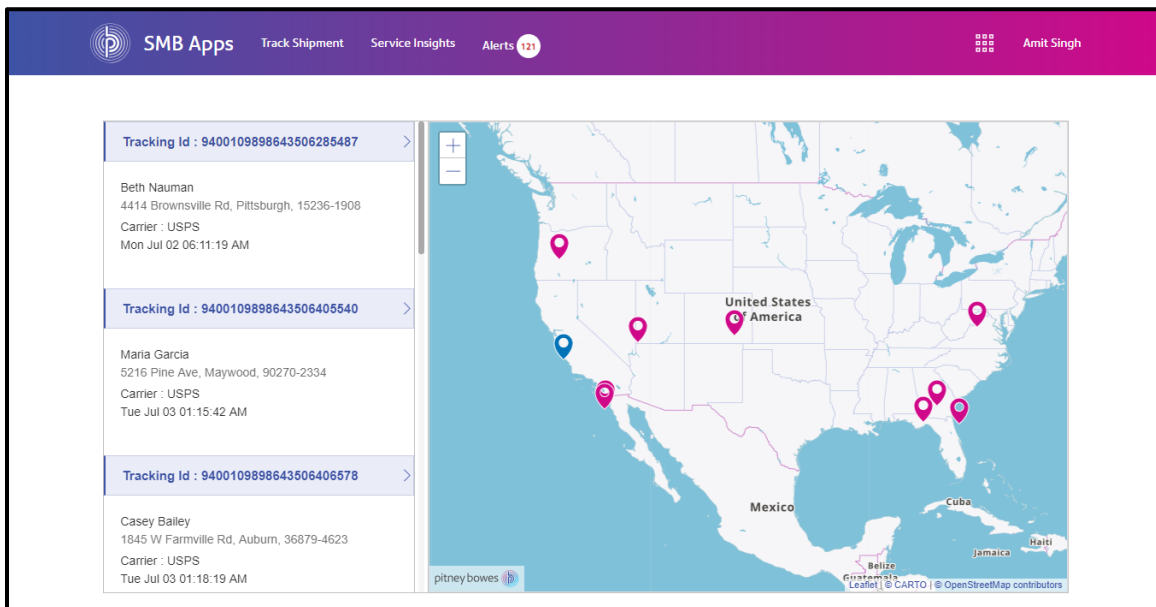
Shipping Alerts & Reports

Click on the 'Track Now' link provided to view the details of the shipment and the map view of the sender and recipient locations.

You can see all delivered shipments in a Map view by clicking on the 'Map View' tab. Delivery locations are marked on the map.

3.2: IN TRANSIT

Click on 'Shipments In Transit' to get the information of the orders in transit with the tracking ID, customer name and delivery address. You can select the number of days or months for which you want to see the in transit order status by selecting the required option from the drop-down menu above the list of shipments.

Track any shipment to view its transaction details as shown below

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You can see your in-transit shipments in a Map view by clicking on the 'Map View' tab. In the map view, the delivery locations are plotted wherein you can see locations with single or multiple scheduled deliveries.
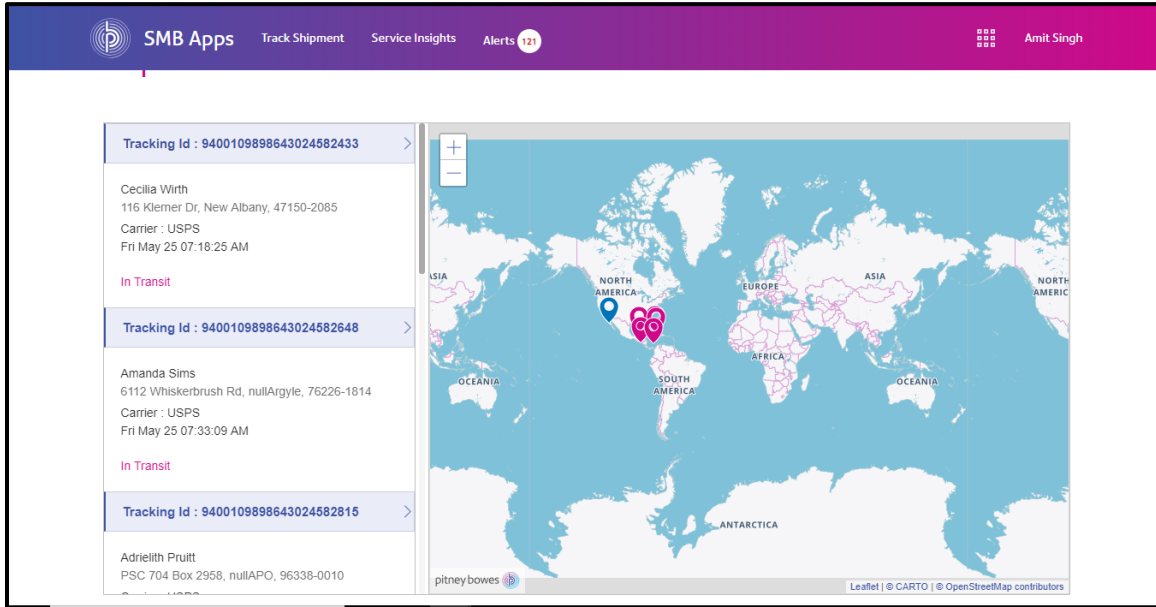
3.3: RETURNED

Click on 'Shipments Returned' to get the information of the orders returned with the tracking ID and delivery address. You can select the number of days or months for which you want to see the returned order status by selecting the required option from the drop-down menu.
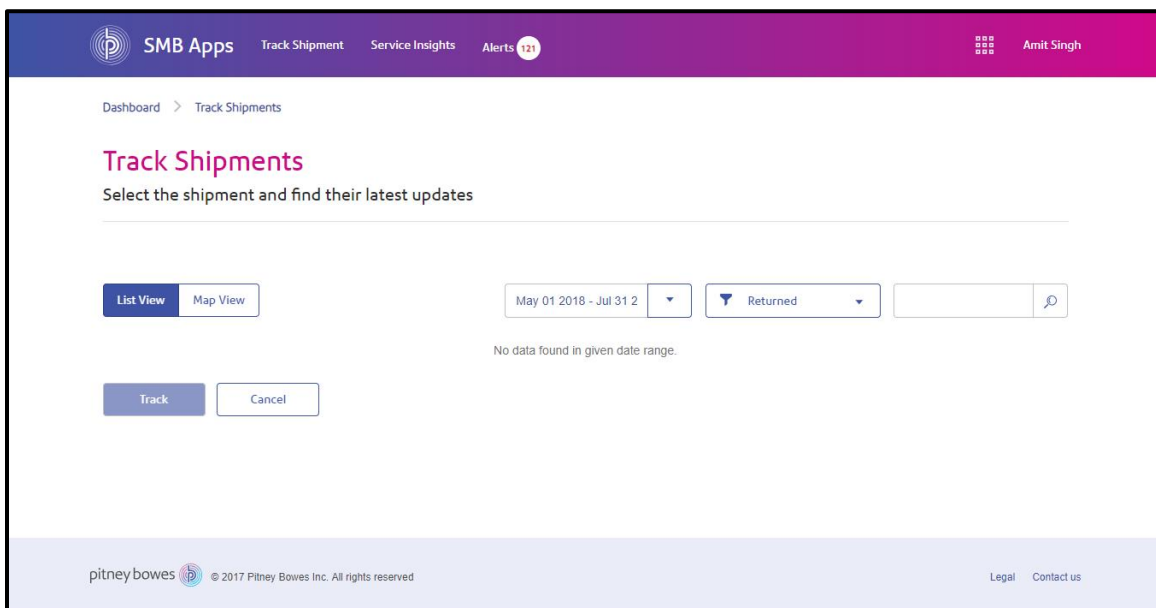
You can see your returned shipments in a Map view by clicking on the 'Map View' tab. In the map view, the delivery locations are plotted wherein you can see locations with single or multiple scheduled deliveries.

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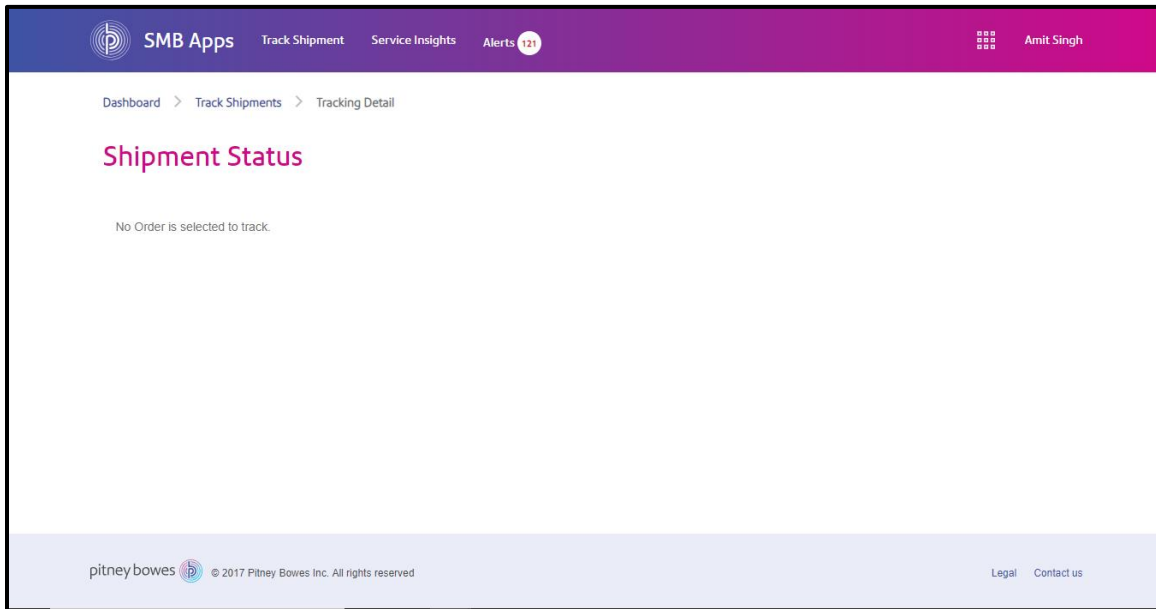
STEP 4: VIEWING SERVICE INSIGHTS

Click on 'Service Insights' tab to get insights into Service Cost, Delivery Days and Breached Delivery Days. It can be viewed in Grid format and Chart format by selecting 'Grid View' and 'Chart View' tabs respectively.
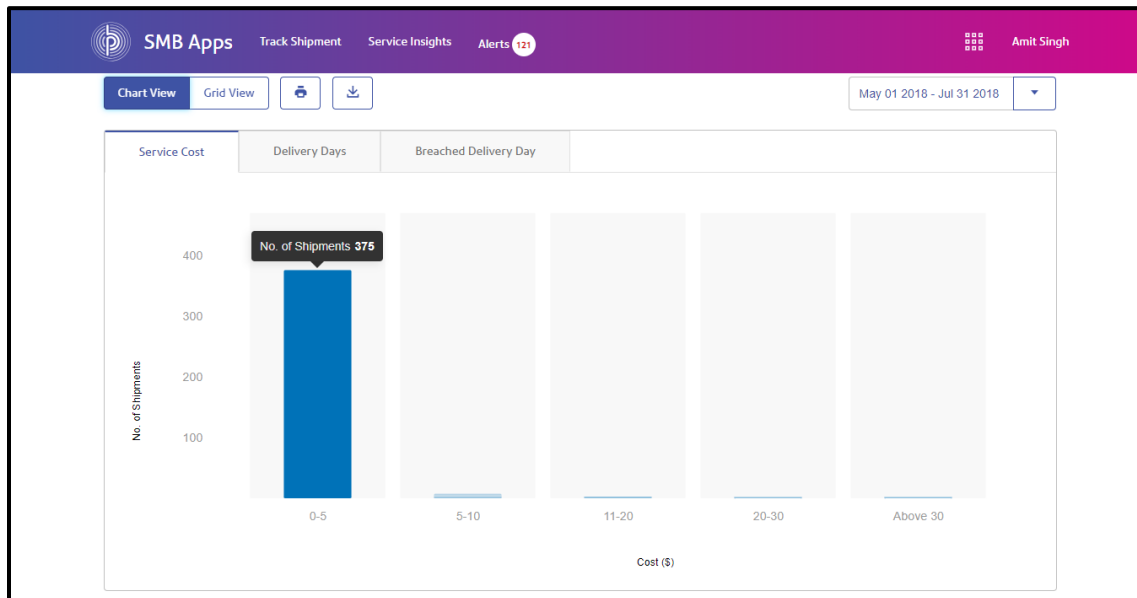
In the grid format, insights regarding shipment distribution by service cost ranges, delivery days and breached delivery days are provided on a single screen.
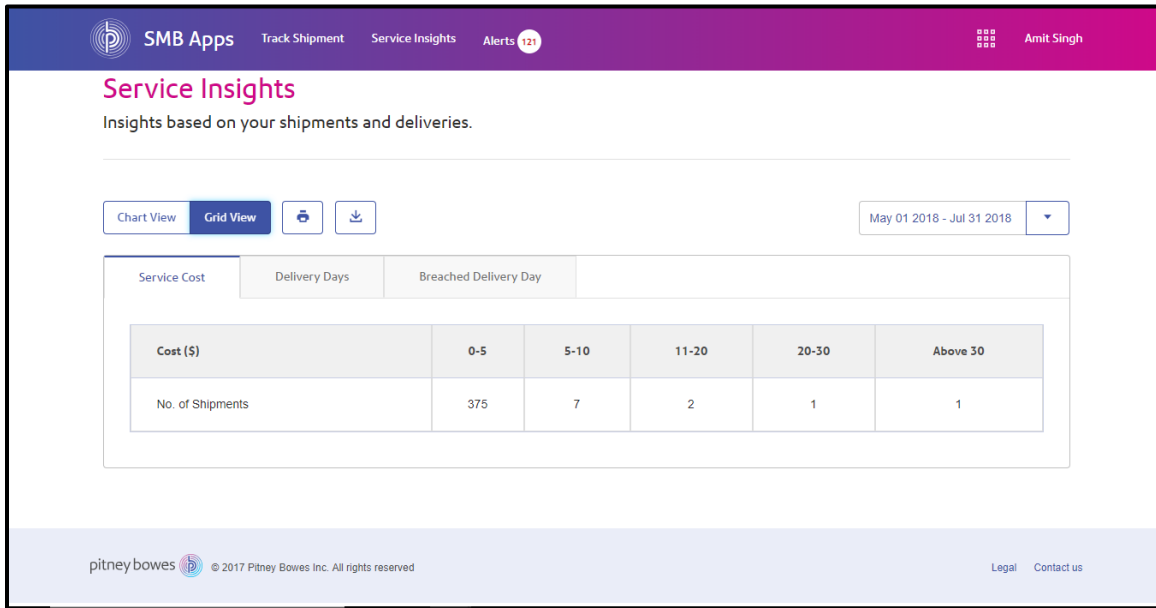
4.1 SERVICE COST INSIGHTS

To view service cost insights click on 'Service Cost' inside 'Chart View'. On this chart you can see your shipment distribution by service cost ranges.
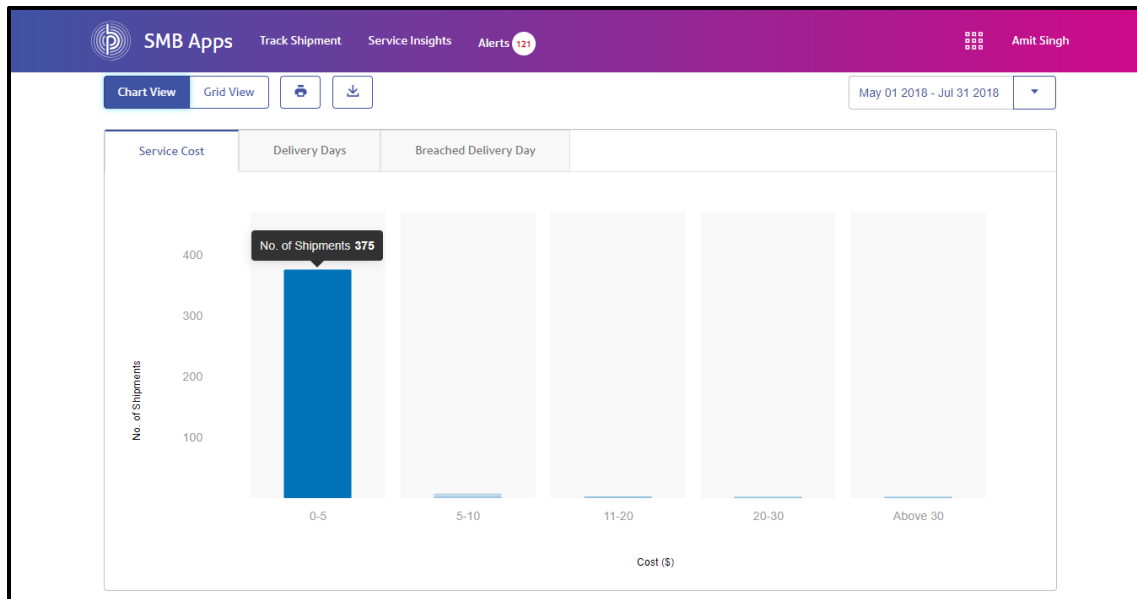
4.2 DELIVERY DAYS INSIGHTS

To view insights on delivery days, click on 'Delivery Days' inside 'Chart View'. On this chart you can see your shipment distribution by delivery days.
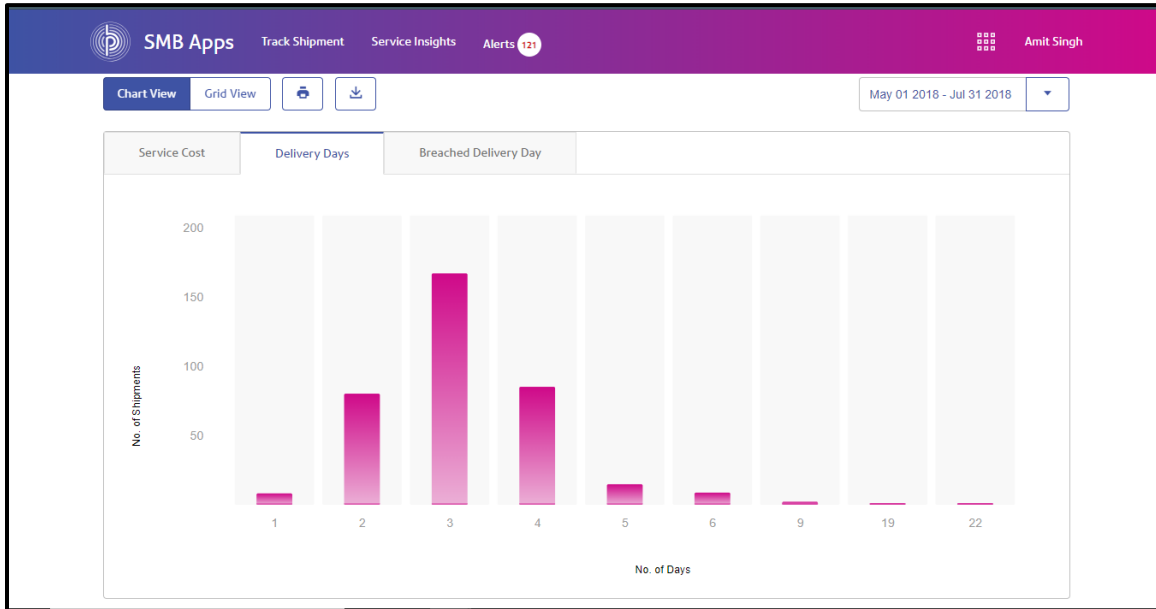
4.3 BREACHED DELIVERY DAYS INSIGHTS

On this chart you can see the number of deliveries breached, along with the number of days breached by.
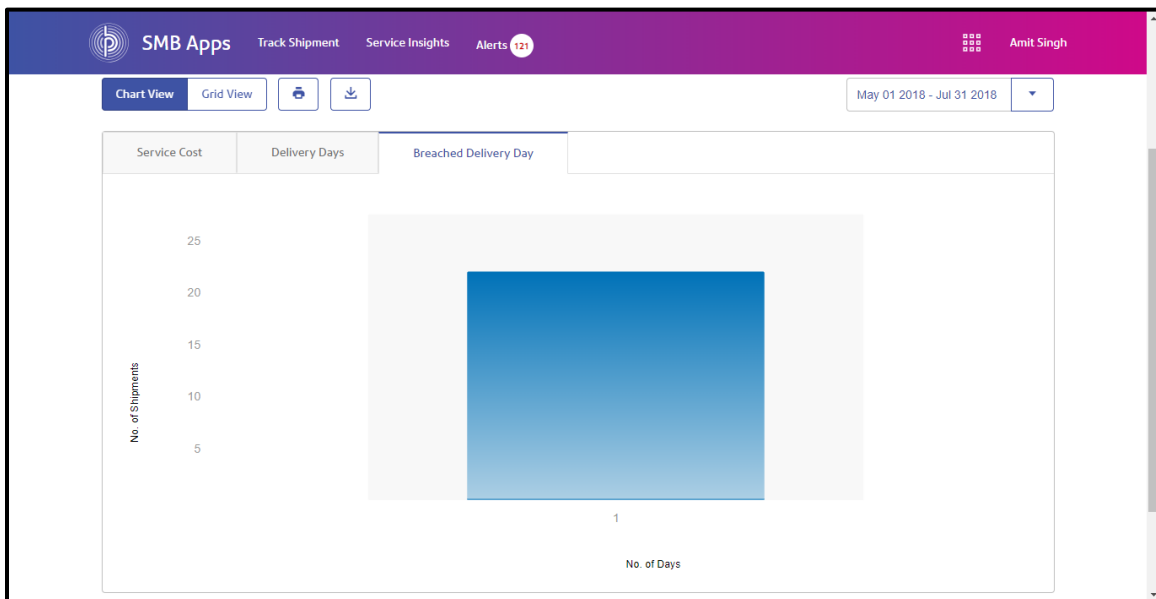
4.4 SAVING INSIGHTS

You can print or download the respective service insights by clicking on the icons provided.
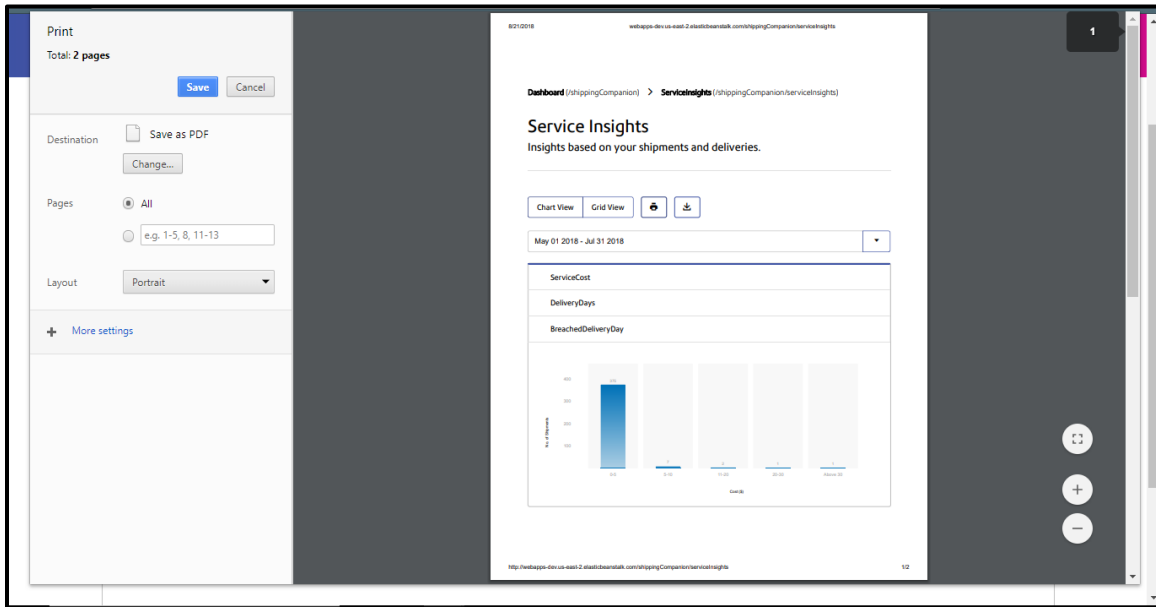
STEP 5: CHECKING DELIVERY ALERTS

Click on 'Alerts' in the navigation panel to view various alerts.

All alerts are displayed with a subject line and an auto assigned priority level with date. A brief description and transaction reference number is provided in the next two lines.
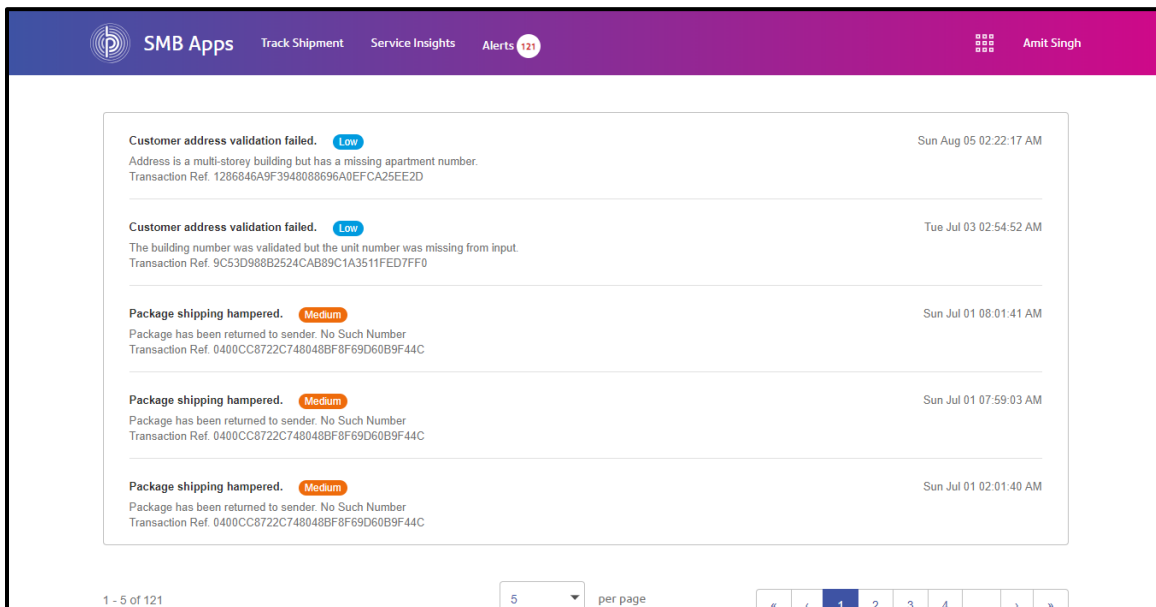
Clicking on an alert will open the detailed description of the alert. The transaction reference number, tracking id, alert description, priority and date is displayed.

STEP 6: TICKET CREATION

Alerts can be used to create tickets in the Freshdesk Companion App. These tickets can be created manually as per your preference.

To create the tickets manually for an alert, click on the alert. You will be directed to the 'Create Ticket' screen of the Freshdesk Companion app. You can then create a ticket as shown below.

To create a ticket you will be required to enter your name and email ID. You can also assign priority to the ticket using the dropdown menu. To further generate the ticket click on 'Create'. If you wish to cancel the ticket click on 'Clear'.

FREQUENTLY ASKED QUESTIONS

1. General Questions

1.1. What kind of Service insights does Shipping Alerts & Reports provide?

Shipping Alerts & Reports provides insights on average delivery days, breached deliveries and shipping cost analysis. Insights regarding average delivery days and shipping costs provide greater accuracy on your delivery timelines and help optimize shipping costs.

1.2. Is my data secure in Shipping Alerts & Reports?

 Yes, Security and privacy of your data is a top priority at Pitney Bowes. No data related to your shipments or customers is stored on the Pitney Bowes Send Pro C-Series device.

2. On-Boarding

2.1. How long is the onboarding process?

The onboarding process for Shipping Alerts & Reports is short and simple. You will only require your Pitney Bowes account details and you can start using the application right away after accepting the terms & conditions.

2.2. Is using Shipping Alerts & Reports free?

Yes, Shipping Alerts & Reports app does not charge for any feature/service.

3. Managing Shipments

3.1. Does Shipping Alerts & Reports provide real time delivery status?

The delivery timelines provided for USPS shipping by Shipping Alerts & Reports are near real time and can be used for providing accurate delivery estimates. Real time tracking for UPS and FedEx is currently unavailable and may be available in future.

3.2. What are real time alerts?

Real time alerts are notifications generated by Shipping Alerts & Reports in the event of failed/ delayed deliveries. These notifications are used to automatically create a customer query ticket on your Freshdesk app.

3.3. Can I generate customer query tickets for the alerts?

Shipping Alerts & Reports helps in manual creation of tickets for failed/ delayed shipments in your Freshdesk account by directing you to the 'Create Ticket' screen of the Freshdesk Companion app.

3.4. Can I view my shipment history?

Yes, you can view your shipment history anytime by clicking on 'Shipments Delivered' option on the Dashboard. This provides a complete list of all past shipments across carriers.

3.5. How can I check the status of my shipments?

You can check the status of the shipments by selecting the relevant option from the dashboard (Delivered, In Transit, Returned shipments). You can also use the search bar to view status of a specific shipment.

You can also refer to the app user guides for more detail into the application workflow.

For more information regarding the app, contact us at +1-800-522-0020