

User Guide

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Product: Shipment and Package Management App



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Introduction





The Shipment & Package Management Application is a Microsoft Power Platform solution for collecting customer shipment details and automating the process of sending customer notifications via text messaging on status of package deliveries. It maintains updated records of customer transactions with the business in a secure database.

Accessing the solution






By going to <https://make.powerapps.com/> > Sign-in > Navigate to Apps and select Shipment & Package Mgt App





Navigating the Application

The home screen is a welcome page with a navigation menu at the bottom for easy access to the main sections of the application.

Application Action	Description
	The admin will choose between creating an inbound shipment or an outbound shipment by selecting one out of two choices.
	The admin can type in a Customer code or phone number in the search box in order to retrieve inbound shipments specific to the search entered.
	This shows a summary list of all created inbound shipments. User can click navigation icon to see more details
	This shows a summary list of all created outbound shipments. User can click navigation icon to see more details or click addition icon to make a new outbound personal shipment entry for the specific shipment.

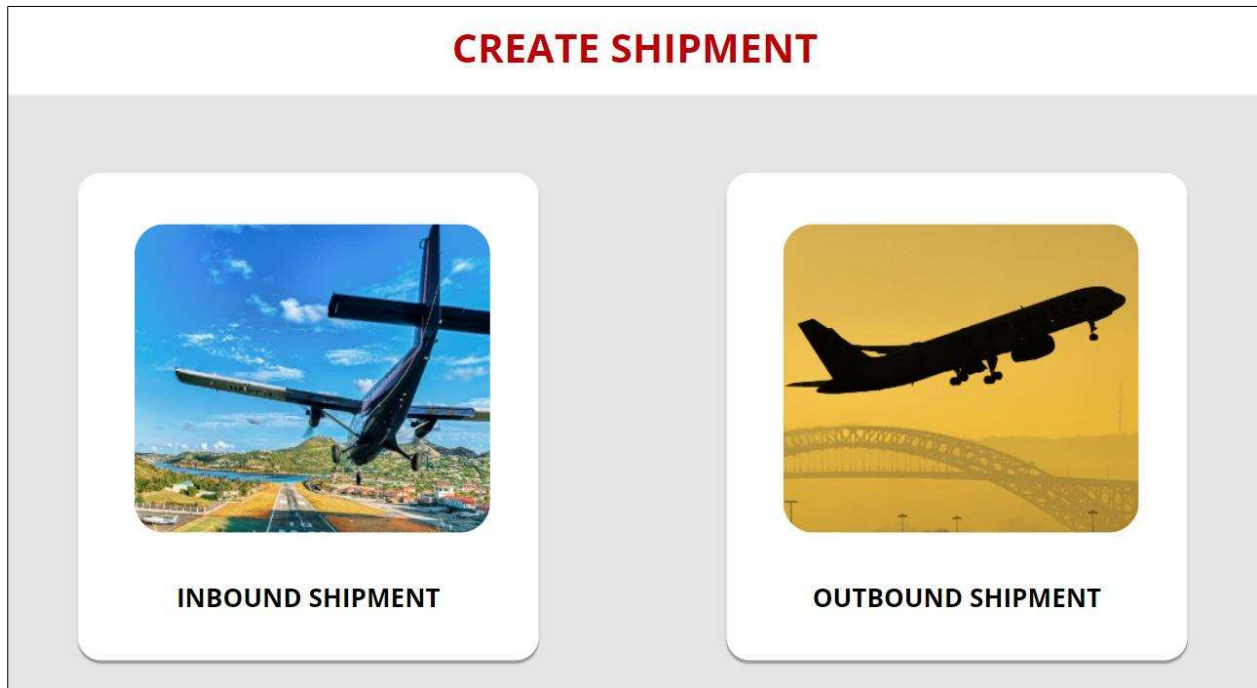
On various screens of the app, different icons perform distinct functions:

	Click to navigate to last viewed screen.
	Click to see more details of selected shipment.
	Click to open blank OUTBOUND personal shipment form in order to make new entry.
	Click to edit details of selected item.
	Click to return search results on Package Finder.

	Click to send SMS notifications for selected customer packages
	Click to submit an update on Personal shipment after editing entry.
	Click to export details of shipment in Excel file.
	Click to submit form data for outbound shipment.

Creating Shipments

Under the CREATE SHIPMENT screen, the user can select between initiating the process of creating an INBOUND SHIPMENT or an OUTBOUND SHIPMENT by clicking on the appropriate image.



Inbound Shipments

To create Inbound shipment, user must enter a *Shipment number* and fill out the *Origin*, *Custom Status* and *Arrival Date*. Then choose between *Paste From Excel* or *Upload From OneDrive*.

Shipment Number: <input type="text"/>	Origin: <input type="text"/>
Custom Status: <input type="text"/> 	Arrival Date: <input type="text" value="6/10/2022"/> 

Note: If user fails to enter shipment number before making a selection of data entry mode (*Paste From Excel* or *Upload From OneDrive*), an error message is displayed on screen to the user.

Error: Please enter shipment Number

Using Paste From Excel

Click *Paste From Excel*



Copy single or multiple customer records (**without table headers**) from the Excel sheet of a specific template and paste into the Clipboard area.

- Record copied should have 7 columns in the order shown below:

A	B	C	D	E	F	G
Customer Name	Customer Code	# Packages	Contact Mobile	Location	Kilograms Quantity	Cost (\$)

Click  to save record in the app and create inbound shipment.

Using Upload From OneDrive

Go to the business shipping Excel file saved on the company's OneDrive. Update the rows in the Excel table with the customer package details for that shipment. Ensure document is updated and saved online.


Click *Upload From OneDrive*



The app loads the data from the Excel

Outbound Shipments



To create Onbound shipment, user must enter a *Shipment number* and fill out the *Origin* and *Estimated Dispatch Date*.

Note: If user fails to enter shipment number before clicking , an error message is displayed on screen to the user.

Error: Please enter shipment Number


The created outbound shipment will be empty when first created. User has to add packages to the shipment.

Enter all information on form and click  to save package to the outbound shipment.


From the OUTBOUND SHIPMENT screen (click ) click  to see list of packages in a particular shipment.

Editing Shipments

Inbound Shipments

To edit previously created inbound shipment, click  to see a list of all inbound shipments.

Select a shipment of interest by clicking  for that shipment row. The screen navigates to show a list of customer packages in that shipment.


Select  to see the details of a particular customer entry, make necessary updates and save. A success message will be displayed.



Outbound Shipments

To edit previously created outbound shipment, click  to see a list of all outbound shipments.

Select a shipment of interest by clicking  for that shipment row. The screen navigates to show a list of customer packages in that shipment.

Select  to see the details of a particular customer entry and make necessary updates.



SMS Notifications


To send SMS notifications to customers from the app, User should navigate to INBOUND



or OUTBOUND



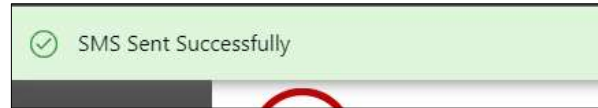
shipment screen and select shipment row of

interest by clicking . User should select the customers to be notified and then click the Send SMS button.

For custom SMS, a pop-up screen opens up for inputting the desired SMS. This screen also has a segment counter that lets the sender know the estimated number of segments in the custom SMS. Note that this segment indicator is only a guide and may not be the same as the SMS service provider counts their SMS dispatched segments.



A success message will be displayed.



Package Finder

The packager finder allows the user search for Inbound shipment packages using either a Customer code or Phone Number. The search returns all inbound packages for that customer.