

How To...

Create a docket for unsorted mail



1. Login into the Customer Portal via gaia.whistl.co.uk.
2. The portal will open on the **Declarations home page** screen.

Search Declarations mfuge

Dashboard / Search Declarations

Search Export Create

Type to filter

Date	Declaration No.	Client ID	Customer Ref.	Service	Total Items	Total Containers	Status	Updated	Actions
Load More									

Client ID ?
Please select a customer

Declaration No. ?

Customer Reference ?

Status
Select one or more Statuses...

Start Date End Date

Service
Please select a Service

Search

3. Search for the Client ID you want to create a docket for, under the **Client ID** field and to create a docket, select **Create**. A box will appear, where you will need to select **Create Edocket**.

Search Export Create

Type to filter

Date	Declaration No.	Client ID	Customer Ref.	Service	Total Items	Total Containers	Status	Updated	Actions
Load More									

Create ×

Customer ?
P0966711 - Customer Services - Non-invoice Code ×

Cancel Create International Create Edocket

Client ID ?
P0966711 - Customer Services - Non-invoice Code

Declaration No. ?

Customer Reference ?

Status
Select one or more Statuses...

Start Date End Date

Service
Please select a Service

Search

4. You will then need to complete the following fields:

Service	PremierSort Flex or AllSort
Format/ Destination	<ul style="list-style-type: none"> PremierSort Flex – Letter or Large Letter AllSort - Letter, Large Letter, Packet, Parcel, International Europe, or International ROW
Total Items	Input the total number of items
Total Containers	Input the total number of trays or bags
Customer Reference	Input a reference of the customer's choosing. This will appear on the invoice, as well as being able to be used for reconciliation purposes when searching for a docket.
Indicia	If the items are pre-printed with an indicia leave the toggle off. If you require Whistl to print the indicia switch the toggle on.
Return Address	If the items are pre-printed with a return address leave the toggle off. If you require Whistl to print the Return Address switch the toggle on.

5. The below example shows the docket for a customer sending 1000 PremierSort Flex letters in 5 trays, and 10 AllSort packets in 2 trays.

They would like the reference **TEST & TEST 2** to appear on their invoice.

The return address is already pre-printed on their items, however they require Whistl to print the indicia.

Manifest Header - EDocket

Account A00218 - Sundry Account	Full Customer ID P0966711 - Sundry Account	Collection Point 1 - January	Department 1 - January
Declaration No.	Declaration Status DRAFT	Declaration Date 26/02/2024	

EDocket Consignments

Service	Format/Destination	Total Items	Total Containers	Customer Ref.	Indicia	Return Address	Weight	Actions
PremierSort Flex	UK Bound Letter	1000	5	TEST	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0-100	
Allsort	UK Bound Packet	10	2	TEST 2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Multiple	

[+ Add Consignment](#)

[x Exit](#) [Save](#) [Submit](#)

6. You can choose to **Save** or **Submit** your docket – highlighted by the orange and green boxes to the right of the page.

7. If you would like to save a draft copy of your docket, in order to come back to it later to amend it or finalise the selections you have input, please click **Save**.

This docket has been saved as a draft.

8. If you are happy that the docket is correct, please click **Submit**.

Please note once a docket has been submitted you will be unable to amend or delete it.

9. Click **Exit** to return to your Docket home page.

10. The docket home page now lists any dockets that have been created. See example below.

The screenshot shows a search interface on the left with fields for Client ID, Declaration No., Customer Reference, Status, Start Date, End Date, and Service. On the right, a table lists dockets with columns: Date, Declaration No., Client ID, Customer Ref., Service, Total Items, Total Containers, Status, Updated, and Actions. A 'Load More' button is visible below the table.

Date	Declaration No.	Client ID	Customer Ref.	Service	Total Items	Total Containers	Status	Updated	Actions
2/26/2024	EDKT260220240001	P0966711	1010	7	Draft	2/26/2024, 9:38:20 AM	[Check] [Print] [Delete]

11. The listed dockets show the following details;

- **Date** the docket was created
- The **Declaration No**, alternatively known as the E-docket number
- The **Client ID** the docket has been created against
- **Customer Ref** and **Service** – whilst this doesn't show here, due to their being multiple references, they can be viewed once you go back into the docket detail
- **Total items** shows the total number of items that were listed against all lines on the docket
- **Total containers** shows the total number of containers that were listed against all lines on the docket
- **Status** of the docket – *the first docket created was saved as a draft. The second docket has been submitted (and therefore cannot be amended or deleted).*

12. There are **Actions** tabs at the end of each docket line. In order of reference:

- **View/Edit** – from here you can return to the docket creation page to view the docket, or to edit and submit a draft copy
- **Preview Customer Sheet** – this will show your tray card, and from here you can print it off
- **Preview Docket Receipt** – this will show your docket receipt. This can be signed by the customer and the driver upon collection.
- **Delete** – only available if the docket has been saved as a draft

13. After clicking **Preview Customer Sheet**, the below tray card preview appears. You can print from here.

The screenshot shows a 'Print Customer Sheet' dialog box. On the left is a preview of a customer identification card with fields for Customer Name, Customer Number, Service Type, Mail Type, and various reference numbers. On the right, there are instructions and a note: 'Please check the preview of the customer sheet(s) on the left' and 'Note: A customer sheet must be present in all containers.' Below the preview is a 'pageNo' dropdown set to '1' and four buttons: 'Print (per container)', 'Print (per consignment)', 'Print', and 'Exit'.

14. After clicking **Preview Docket Receipt**, the below preview appears. You can print from here.

est / Search Declarations / Edit Manifest / Search Declarations

Print E-Docket

whistl

Barcode: 4247260228081

Collection Receipt:
Customer Name: Customer Services - Non-Invoice Code
Customer Number: F05827 Collection Point ID: 1
Department: 9 January Collection Date: 20240308

Service	Product/Description	Job Reference	Quantity	State
Alloys	UN BRASS PISTON	1857	0	38
Prosthetic Part	UN BRASS LENS	1858	5	3888
		(Total)		3888

Collection Confirmation:
Signature: _____
Date: _____ Time: _____

Your Whistl user is signing for receipt of your collection. Distribution of items is final and not verified at time of collection.
Page 1 of 1
Printed on 21/03/2024 08:22:00

If you require a receipt or signed confirmation of the collection, please print out and use this docket.

Print Exit