

CANADA POSTES
POST CANADA

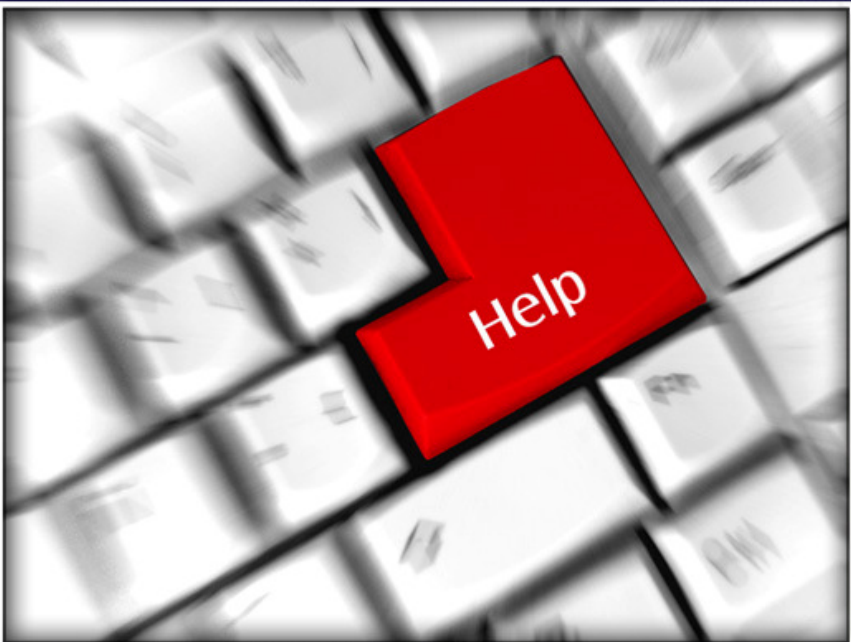


Electronic
Shipping Tools

User Guide

Online Version

Order Entry



Unaddressed Admail - SOM Only

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1.0 Introduction

About Electronic Shipping Tools (EST)

This guide is designed to help you learn the basic functions of *Electronic Shipping Tools (EST) Online* version in order to prepare your *Unaddressed Admail – SOM Only* mailings. It takes you through the process of completing your Statement of Mailing (SOM) electronically from the data entry into the application, along with the validations that take place and the functionality of the command buttons and templates to transmitting and printing your SOM.

Navigating Around *Electronic Shipping Tools*

To select from the Menu on the Navigation bar or to activate a command button:

Use the mouse to point and click on the desired option.

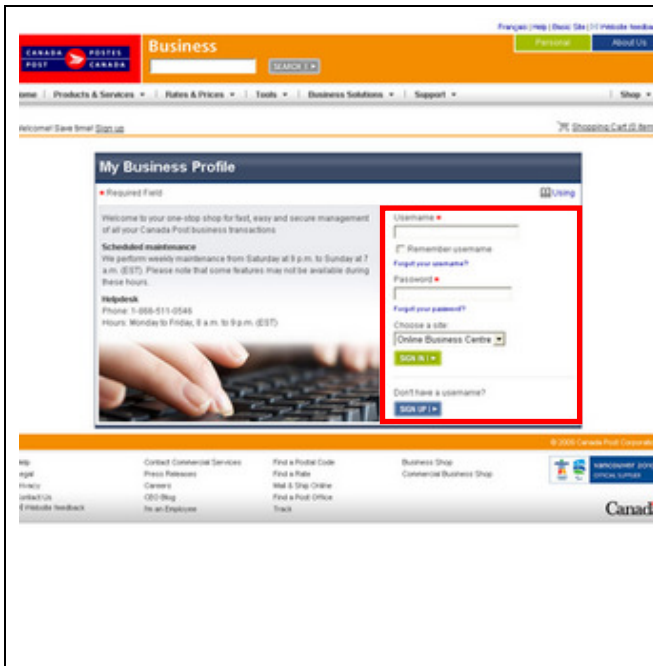
To move from field to field:

- Use <TAB> or your mouse to move from one field to the next or point and click with the mouse.
- Use the left and right arrow keys to move between choices for a single field (e.g. radio buttons). Click on your choice to select it.
- Click on the down arrow to display a selection/drop-down list.

As you move from field to field, the application performs validation on the data type and format. You must acknowledge the message and make the necessary correction to the field in order to continue with the data entry.

For more details on any aspect of our EST application, click here and choose from the various topics displayed on this page. For technical assistance, please contact the EST Help Desk weekdays at 1 800 277-4799, from 07:00 am to 20:00 pm (Eastern Standard Time). For more detailed information about Canada Post's products and services, please visit our Web site at www.canadapost.ca, or consult Canada Post Postal Guide at <http://www.canadapost.ca/business/tools/pg/default-e.asp>.

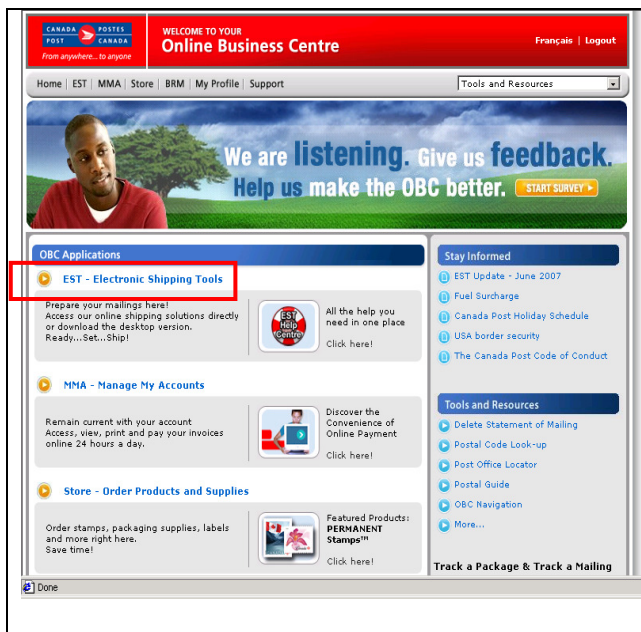
Using the *Online* version



Before you begin, please ensure that you have the following information:

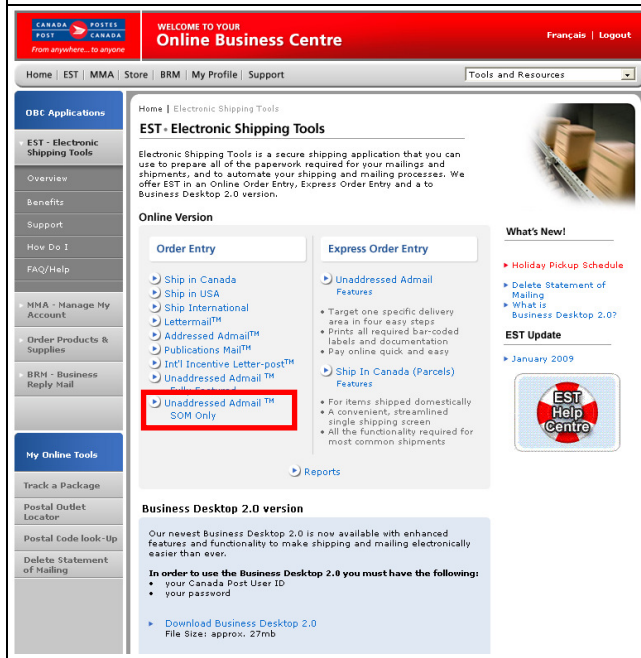
- Your Canada Post customer number, your Contract Number (when applicable). If you do not have a customer number and contract number, or if you don't remember them, simply call our Business Sales Centre (BSC) at **1-800-260-7678**. If you are a new customer you will be asked to fill out a credit application.
- Your Username and Password to Sign in to the Online Business Centre:
www.canadapost.ca/cpid/apps/signup?execution=c2s1 You can then access the OBC and the Electronic Shipping Tools EST. You may also register for a User ID and a Password by calling **1-866-511-0546**

Once you have obtained all the information stated above, enter the Canada Post Web site at: www.canadapost.ca/obc When this page is displayed: you simply enter your Username and Password and click Sign In.



The Welcome page to the Online Business Centre is displayed. Click the arrow in the EST - Electronic Shipping Tools quadrant.

This will bring you to the *Electronic Shipping Tools* (EST) landing page (see below), where you will be able to select the Service for data entry and prepare the paperwork for your mailing



Upon selecting *EST* from the Online Business Centre (OBC), you will find the service offerings available for Communications Services included in the box entitled *Online Version*.

Note: In the top right-hand corner of this page, you can access the OBC help and toggle between English and French screens

Click on the Unaddressed Admail SOM only service to display the service option page.

2.0 Creating Your *Unaddressed Admail SOM Only*

Fields	Description
Select Template	Optional field. From the drop-down list, this field allow you to select a previous SOM that you have already created and saved as a Template. Click on the <i>Retrieve</i> command button to display it.
Mailed by (Customer number) *	Mandatory field. Select from the drop-down list the CPC assigned customer number of the customer that is preparing the mailing.
Mailed on Behalf Of (Customer Number) *	Mandatory field. Enter the customer number of the owner of the mail, especially if different from the “Mailed By” customer number. This numeric field identifies the CPC assigned customer number of the customer who owns the mailing (I.e. customer on behalf of whom the mailing is being prepared).
Contract Number	Optional field. Enter the contract number associated with the mailing.
Paid by *	Mandatory field. Enter the customer number of the customer who will be paying for the mailing. A validation is performed to ensure the “Paid By Customer” is a valid payer partner of the “Mailed on Behalf Of” customer number.
Contact Name*	Enter the name of the contact person familiar with this mailing.
Telephone Number*	Enter the telephone number and, if applicable, the extension number of the contact person.
Date of Mailing* (YYYYMMDD)	Enter the date when the mailing is to be inducted at CPC (format YYYYMMDD). This field has an impact on the calculation rules used by the application. <i>Note:</i> You will not be able to create and transmit your SOM with a mailing date that is prior to the current date.
Post Office Outlet	Click the <i>Select Outlet</i> command button to select a post office (number and name) where the mail will be inducted into CPC’s mail stream. A pop-up window allows you to search for a post office by Province and City or by post office number. Upon clicking on a post office, you are returned to the SOM data entry window with the post office field appropriately filled. See below for more detailed information.
Method of Payment * ➤ Account ➤ Credit Card	From the drop down list, select your primary Method of Payment (MOP) for the mailing. This field is defaulted to the preferred MOP associated with the Paid by Customer (if any). There are two valid MOP (account and credit card). ➤ Account: Refers to a valid MOP made by a customer to cover current and future mailings, which will be reported to the Customer’s account with CPC. ➤ Credit Card - Refers to a valid MOP made by a customer to cover current and future mailings, which will be charged to the Customer’s credit card. When you select Credit Card as your MOP, the <i>Credit Card Information</i> link will be displayed on your form; click on it to display the Credit Card Information page. See below for more detailed information ➤
Customer Reference Number	This is an alphanumeric field for your internal usage that appears on your Invoice/Order Record.
Continuous Inbound Freight (CIF)	Check this box if your mail originates outside Canada and is to be delivered directly to a CPC plant. If the box is checked you are required to provide CPC with documentation that shows proof of origin, such as a Canadian Customs document or Bill of Lading, in order to be exempt from Canadian sales tax.
Mailing Type ➤ Full ➤ Partial	Click on the <i>Full</i> radio command button if the entire mailing is deposited at one time. Click on the <i>Partial</i> radio command button if the mail corresponding to the SOM will be inducted in multiple shipments over one or more days. When <i>Partial</i> mailing is selected as the <i>Mailing Type</i> , the <i>Date of Mailing</i> and <i>Shipment No.</i> can be specified at the line item level. <i>Note: For Partial Mailing, you must pay for the entire mailing with the first deposit.</i>
Monos (Full and Partial Mailing)	Enter the number of monotainers used to hold the mailing. A monotainer is a large, collapsible metal cage used to transport containers and/or brick-piled mail items between large volume mailers and post offices.

Skids (Full and Partial Mailing)	Enter the number of skids used to hold the mailing. A skid, also referred to as a pallet, is a wooden/plastic/aluminum platform for the conveyance of containers.
Customer Supplied Containers	Enter the number of each type of container (Monos, Skids) used for the mailing. To ensure your containers are acceptable, please contact CPC Business Access Hotline at 1 800 260-7678 or your CPC Representative.

The following table provides a description of the COMMAND BUTTONS functionality of the Mailing Information section.

Command Button	Result of Invocation
Retrieve	If a saved Template has been selected from the drop-down list, just click on this button to retrieve it. To retrieve a template, the user must have already created and saved a SOM as a template.
Select Post Office Outlet	Clicking this button will open another page where you will be able to search and select a post office for induction of your mail. The post office identifies the name and number of the CPC location where your mail will be brought for induction into CPC's mail stream.

Select Outlet page

Simply follow the instructions by:

- Selecting from either “Major Post Offices only” or “All Post Offices” list by choosing the appropriate radio button.
- Selecting a Province
- Selecting a City
- Clicking on “Search”

A list of post offices will be displayed; select the post office and the Name will be populated on the data entry page.

Note: If you know the post office number, enter the number in the Outlet No. Box and click on the Search button. You can select a post office by clicking on the Post Office Name link.

Simply click on the *Cancel* button to cancel your search and/or return to your data entry page.

Credit Card Information

When you have selected Credit Card as your MOP, a link is displayed on the Data Entry page. Click on it to display the Credit Card Information page. Simply enter the following information:

- Credit Card Alias
- Credit Card Type
- Credit Card number
- Credit Card Expiry Date
- Credit Card Owner
- Security Feature – Credit Card Verification Number (**Venture 1 Customers only**)

Click <OK> to save the information or <Cancel> to return to your data entry page without saving the Credit Card information data.

2.2 “Items” section

Enter the details of your mailing as it pertains to the service description selected here I.e. Unaddressed Admail SOM Only.

You will be required to enter information concerning the Service Description, the Number of Pieces, Weight per Piece and specific information related to the selected service description.

The following table provides a description of the **FIELDS** component of the *Items* section.

Note: An asterisk (*) indicates that the field is mandatory

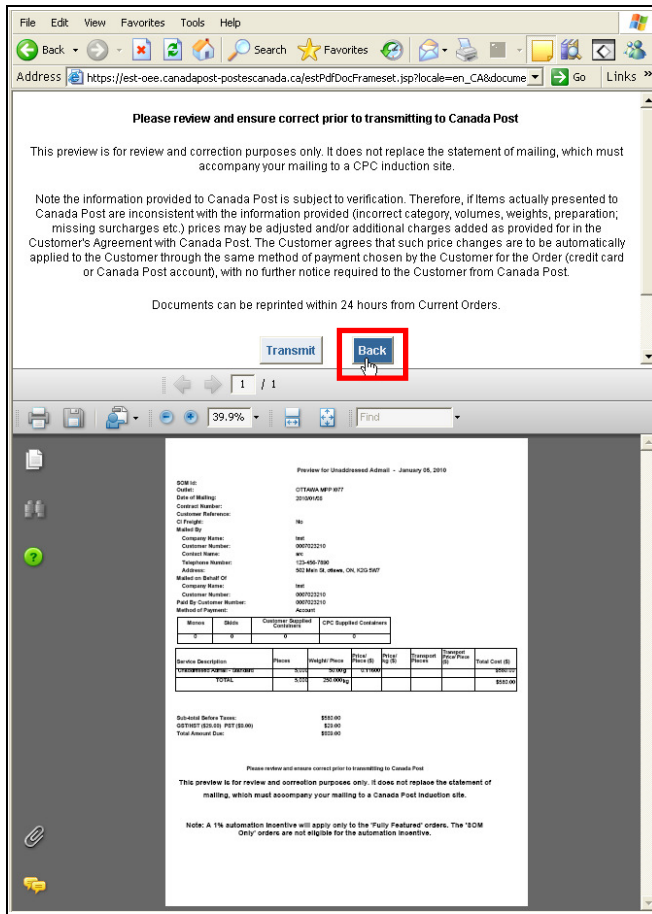
Fields	Description
Size*	It is mandatory to select one of three Size options: <ul style="list-style-type: none"> - Standard up to 30.5 x 15.24cm (12” x 6”) - Oversize 1 up to 30.5 x 22.85 cm (12” x 9”) - Oversize 2 up to 35.56 x 28 cm (14” x 11”) Indicating the size of your mail piece is critical as this determines the Delivery Cycle as well as the delivery modes your business can target. Note: If Oversize 2 is selected, a warning message will appear indicating that mail pieces of this size can only be delivered to Non-Letter Carrier routes.
Samples	A sample consists of non-printed matter, or a trial size portion of an actual product. It may be distributed on its own, attached or enclosed in an envelope with printed matter.
Enable Cost Centre Reference	When this checkbox is enabled, the Cost Centre Reference field will become available to enter the reference data up to 30 characters in length.
Service Description*	From the drop down list, select Unaddressed Admail by clicking on the empty field of the Grid column.

	<p>The Standard category will include Standard size items (no samples), targeting residences only (houses, apartments or farms) using the Upon Receipt delivery option. The Premium category will include all of the Basic features plus value-added features such as Samples, Oversize items, the Specified Delivery Start Date delivery option or targeting to Business Points of Call.</p> <p>The Premium price applies to the entire order when:</p> <ul style="list-style-type: none"> ➤ Oversize is selected and / or ➤ Samples are selected
No. Of Pieces*	Enter the total number of pieces being mailed for the Unaddressed Admail Service Description, making up part or all of the mailing issue.
Weight per Piece *	Enter the weight per piece in kilograms for the specific line item. The weight is necessary to calculate postage costs.
Transportation required	Select the check box to indicate that the pieces for this given line require transportation to a different Post Office.
Date of Deposit	Select date from the drop down calendar; you must click in the empty field to display the calendar. Identify the date when the mailing item will be inducted at CPC. The Date of Deposit has an influence on the calculation rates.
Cost Centre Reference	This field is displayed when the <i>Enable Cost Centre Reference</i> box has been selected. The data captured in this field appears on your electronic invoice via <i>PosteCS</i> , allowing you to allocate costs internally at the line item level.
Save as a Template	Check this box if the data on this page should be saved in a template following a successful preview of the data. Your SOM must be completely error-free in order to be saved as a template.
Template Name	Enter the name of the template you wish to save.

The following table provides a description of the COMMAND BUTTONS functionality of the *Items* section.

Command buttons	Result of Invocation
Preview	<p>Once all the required data has been entered, you can generate a preview of the electronic statement of mailing (SOM) by clicking on the <i>Preview</i> button. This will trigger a validation sequence against Canada Post database.</p> <p>If there is NO error, Adobe Acrobat will be launched in your browser window. A preview of your electronic SOM will be displayed containing the data you entered and the price calculation based on your data. You should verify that the information presented is accurate before you transmit the SOM.</p> <p>If errors are found, a message is displayed indicating what caused the error. Upon correcting the information and no additional errors being found, preview your order once again.</p>
Clear	When you click on the <i>Clear</i> button, all the fields are cleared. Use this button when you want to start over with data entry.

3.0 Calculating and Previewing your *Unaddressed Admail SOM Only*



To preview your SOM, click on the *Preview* command button.

This function allows you to validate the information related to your mailing. It allows you to verify your SOM information with the price rating of your order so that you can visually validate the results prior to finalizing and transmitting your completed SOM to CPC.

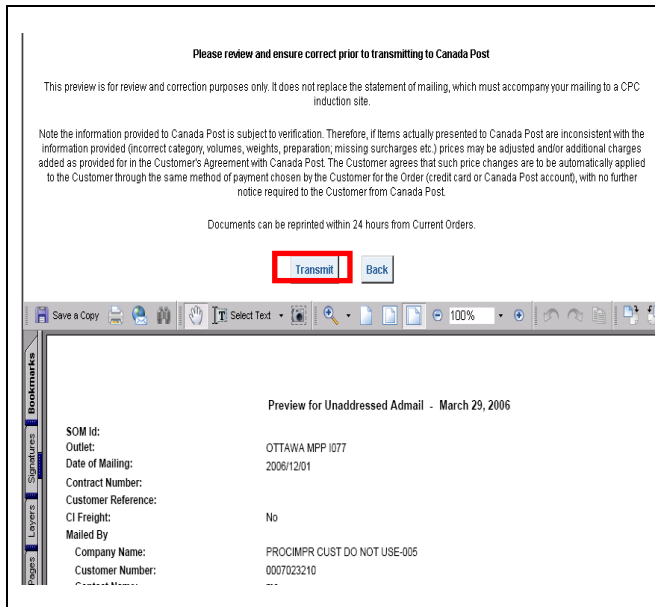
If an error is found, a message dialog box is displayed with details on the error.

In the case where changes are required to your SOM:

- Return to the data entry field(s) requiring correction using the <Back> command button;
- Make your changes or corrections and then,
- Preview your SOM again.

As stated in the top section of the report, this preview is for review and correction purposes only. It does not replace the Statement of Mailing, which must accompany your mailing to a CPC induction site.

4.0 Transmitting your *Unaddressed Admail SOM Only*

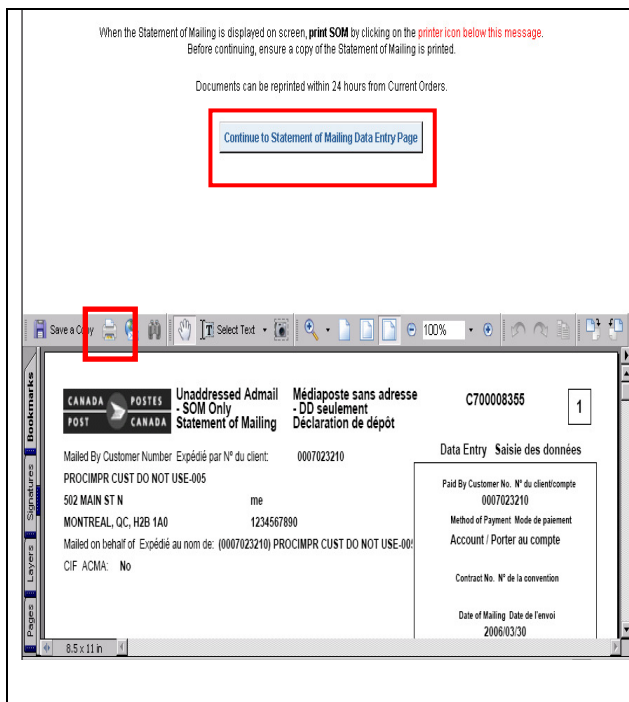


Once you have verified the accuracy of your SOM information in the *Preview*, click the *Transmit* command button located at the top of the *Preview* report page and your order will be send electronically to CPC.

Prior to transmit your mailing to CPC, take note of the disclaimer message located at the top of the page.

If the transmission fails, an appropriate error message will be displayed. Please note the error message and message number if additional help is required. This will assist the Help Desk in expediting error resolution.

5.0 Printing your *Unaddressed Admail SOM Only*



Your Statement of Mailing can only be printed after a successful transmission to CPC.

When the Statement of Mailing is displayed on screen - meaning it was successfully transmitted to CPC - you can print your SOM by clicking on the *printer icon* below the message.

Before continuing, ensure your Statement of Mailing is printed. There will be three copies of the SOM printed, as follows:

- Data Entry
- Accepting Location
- Customer

Bring the first two copies to the post office location in order to get your mailing accepted by Canada Post, and keep the third one for your records.

To create a new Statement of Mailing, click on *Continue to Statement of Mailing Data Entry Page* command button; it will take you back to a new data entry page.

5.1 View Current Orders

The screenshot shows the Canada Post Online Business Centre interface. The 'Current Orders' section is highlighted with a red box. Below it, a table lists orders with columns for Order Number, Print Count, Service, Document Name, Mailed on Behalf of, and Total Cost. A red box highlights the 'Document Name' column, which includes 'Statement of Mailing', 'Container Labels', and 'Admail Delivery Slips'. A red arrow points to a printer icon in the document viewer toolbar.

Current Orders Table:

Order Number	Print Count	Service	Document Name	Mailed on Behalf of	Total Cost
C700007883	1	Unaddressed Admail	Statement of Mailing	7023210	\$431.80
	1		Container Labels		
	1		Admail Delivery Slips		

Statement of Mailing Details:

Canada Post / Postes Canada
Lettermail / Poste-lettres
Statement of Mailing / Déclaration de dépôt
 C700008202

Mailed By Customer Number / Expédié par N° du client: 0007023210
 PROCIMPR CUST DO NOT USE-005
 502 MAIN ST N Alfred Patry
 MONTREAL, QC, H2B 1A0 613-734-7308

Mailed on behalf of / Expédié au nom de: (0002501724) MINISTRE DES SERVICES GOUVT
 DMC C/VML: CIF ACMA: No
 Co-pkgd in PM pc Conditionnement commun de la Poste-publications: No
 Address Accuracy / Exactitude des adresses: 2006/12/31 95.0 %

Containers / Conteneurs

Mones	Skids	Small Bags / Petits sacs	Large Bags / Grand sacs	Hard Sided / Parois rigides
		Fabrene Canvas Toile	Fabrene Canvas Toile	Flats Tub Lettertainer

Service Description / Description du service: Standard Letters
 Pieces / Pièces: 1,000
 Weight / Poids: 30.00 g
 Price / Piece (\$) / Tarif / pièce (\$): 0.510
 Metered Rate / Aff. Mach.: 0.510
 Options Code \$ / Code d'options \$: 90.00
 Total Cost (\$) / Total des frais (\$): \$510.00

To simplify the creation flow, and to allow you to always have the opportunity to successfully print your documents, a new link **View Current Orders** is added to the Online version of the **Electronic Shipping Tools (EST)** for **Communication Services**.

Your documents can be reprinted up to 24 hours after their transmission. Simply click on the appropriate document name; the document will then be displayed in a PDF format

Click on the printer icon in order to print your document.

Note: This functionality is intended to enable you to reproduce the original output documents for your records in the event the original documents were damaged, or you experienced a printer failure. Affixing the same document on more than one mailing is considered a fraudulent act.

6.0 Deleting your Unaddressed Admail SOM Only

The screenshot shows the Canada Post OBC homepage. The top navigation bar includes 'Home', 'EST', 'MMA', 'Store', 'BRM', 'My Profile', and 'Support'. The 'EST - Electronic Shipping Tools' link is highlighted with a red box. Below the navigation, there are sections for 'OBC Applications', 'My Online Tools', and 'What's New!'. In the 'What's New!' section, the 'Delete Statement of Mailing' link is highlighted with a red box.

This section illustrates the process to delete a SOM.

From the *Electronic Shipping Tools* landing page select <**Delete Statement of Mailing**> which will take you to the SOM deletion form.

The screenshot shows the 'Delete Statement of Mailing' form. The form is titled 'Delete Statement of Mailing' and contains two sections: 'Enter SOM Details' and 'If the SOM # is not known, add the following information:'. The 'Enter SOM Details' section includes fields for 'Mailed by #', 'Mailed on Behalf of #', 'Reason for deletion', 'Date Transmitted', and 'SOM Number'. The 'If the SOM # is not known...' section includes fields for 'Total Number of Pieces', 'Product Type', and 'Dollar Value of SOM'. There are 'Submit' and 'Clear' buttons at the bottom.

You need to provide the following information:

- Mailed by Customer Number
- Mailed on behalf of Customer Number
- Reason for Deletion I.e. printing problem
- Date SOM was transmitted
- Statement of Mailing number

If the user does not have the SOM to refer to, he needs to provide the following information:

- Total Number of Pieces
- Product Type
- Dollar Value of SOM

Once the SOM Deletion request is completed, Canada Post will advise you via email.

Appendix A

Page Setup requirements for Unaddressed Admail Documentation and Forms

Documents and Forms	Page Set-up requirements
Statement of Mailing (SOM)	Page set-up is 8 X 11 inches. , Portrait orientation.