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# SMARTFLOW™ DOCUMENT MANAGEMENT SERVICES

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## 1 WHAT IS SMARTFLOW DOCUMENT MANAGEMENT SERVICES?

SmartFlow Document Management Services is a suite of services that manage the end-to-end communication process. Whether your communication is being sent out or being returned to your organization, that end-to-end communication flow can be managed through a single source trusted provider – Canada Post.

**SmartFlow™ Send service... *supports channel preference***

Canada Post can help you manage your customers’ channel choices. Whether physical or electronic, your clients receive their important mail (bills, invoices, notices, and statements) in their desired channel.

**SmartFlow™ Recover service... *fixes the disconnect and gets it right the next time***

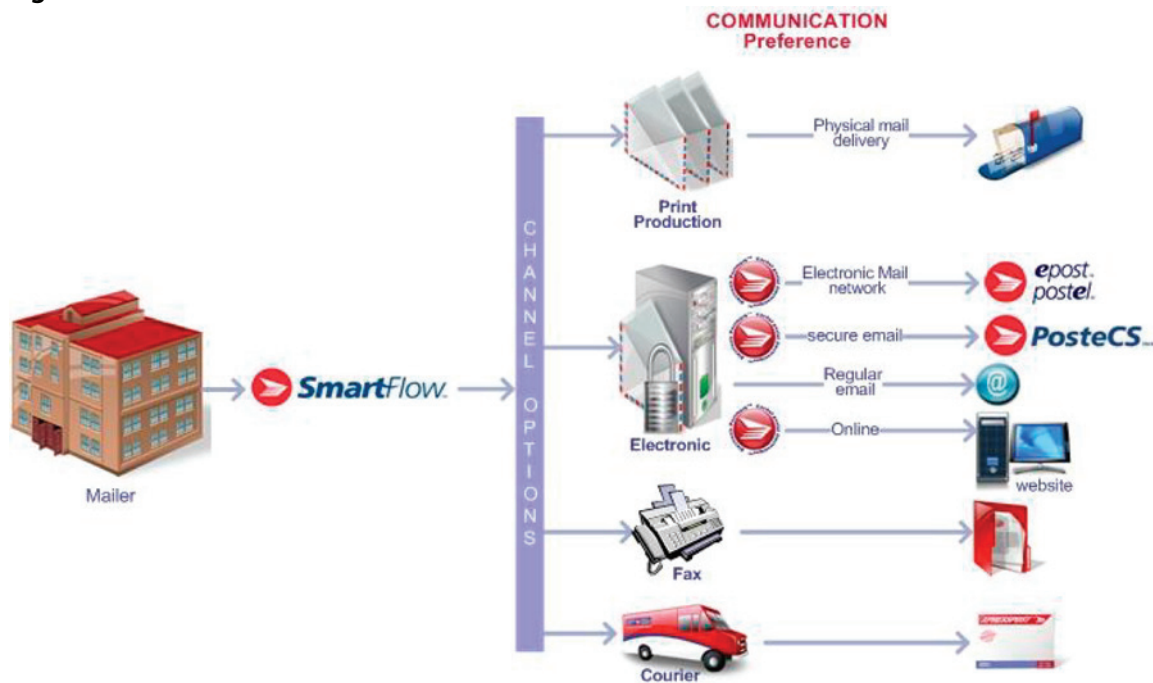
Canada Post helps you manage return mail so that you get the most out of what comes back... keeping you connected with your customers and contacts and saving you money by reducing the number of times you produce a mail item, pay for postage and manage returns.

**SmartFlow™ Respond service... *completes the communication faster***

Canada Post helps you manage getting more out of every customer response by intercepting responses at the earliest point in the delivery cycles so you can improve your customer relationship management cycles and your return on the investment.

## 2 SMARTFLOW SEND SERVICE

Figure 1:



### 2.1 Inputs

With SmartFlow Send service you can submit data electronically via the Internet using secure File Transfer Protocol (FTP), regular FTP, email, mainframe to mainframe transfer or through a secure Virtual Private Network (VPN). You can also submit data physically using a variety of physical media formats, including CD/DVD or magnetic tape.

#### 2.1.1 ACCEPTABLE FILE FORMATS

SmartFlow Send service is designed to be flexible and to accept a variety of file formats, including:

- Advanced Function Printing (AFP)
- System Data Format (SDF)
- Portable Document Format (PDF)
- Metacode
- most Enterprise Resource Planning (ERP) proprietary formats (e.g., SAP, Oracle, etc.)
- Variable Character Delimited (text) Format
- Ashton Tate/Borland dBase II, III, IV, or compatible (DBF)
- Lotus Worksheet or similar (WK)
- MS Access (MDB, ADP)
- Text (TXT, CSV, TAB, RTF)
- Excel (XLS, XLW), Word (DOC)
- XML
- HTML

## 2.2 Services

### 2.2.1 LETTERMAIL OR COURIER

Your files are processed in a secure facility, electronically sorted, prepared and securely forwarded to one or more strategically-located print production facilities across the country. High-resolution printing in black and white, with highlight colours and full-colour digital printing is available. The mail is then processed at the nearest mail processing facility.

### 2.2.2 EPOST™

Your files are processed in a secure facility and its content (mail) is delivered securely through Canada Post's online mail delivery network. Electronic mail is available to the recipient securely using the recipient's predetermined epost box, which is accessible at the Canada Post website or within various financial institutions' online banking websites. We can present the content as a PDF displayed within a browser window or as an HTML web page along with links to more commercial messaging. Payments can be made at the financial institution's bill payment website or at the Canada Post website using either credit card or electronic funds transfer. Mail is protected with the Electronic Postmark™ (EPM). Delivery is guaranteed for the date you specify. Through their epost box, recipients can receive bills, statements and other documents from multiple mailers (currently over 200) in a secure online environment. Recipients have access to their mail within their epost box for up to seven (7) years.

### 2.2.3 SECURE ONLINE DOCUMENT DELIVERY

With PosteCS™, you can leverage the speed of the Internet to securely deliver documents to any recipient with an email address while protecting content of the message with the Electronic Postmark (EPM). You can receive real-time confirmation of message delivery in addition to evidence of individual document accessed by the recipient.

### 2.2.4 EMAIL

For electronic communication where security, privacy and confidentiality are not major concerns, this mail presentment solution can route messages using regular email to a specific recipient with a PDF-formatted attachment.

### 2.2.5 FAX

You may opt for fax delivery of documents. PDF file versions of the document are transmitted directly to the recipient's facsimile number.

### 2.2.6 VIEW ON DEMAND (VOD)

VOD provides you with an outsourced electronic document solution. VOD will provide you with the ability to integrate SmartFlow Send service into your applications. VOD services include:

- imaging and conversion
- storage and archiving
- document management
- ASP hosted Online Document Vault linked individually to you through a secure VPN connection
- authenticated access to the document vault from either your existing front-end service application using a robust API message library or directly from a standard web browser interface for document viewing.

## 2.3 Features

SmartFlow Send service has the following features:

- multiple delivery channels with one input file, managed by Canada Post
- data input transformed to the appropriate formats for consistency across delivery channels
- destination document creation suited to your designated delivery channel(s) and media
- archiving of individual output documents and input data
- fail-safe delivery channel rollover, to secondary channel preference if failure occurs within first option. Includes full re-submission of receiver's transaction document to the secondary channel choice
- channel preference update between you and your recipient
- concurrent delivery using physical and multiple electronic channels, as requested
- one (1) consolidated invoice for SmartFlow Send service.

### 2.3.1 CUSTOMIZATION

The service can be customized to meet your specific requirements.

### 2.3.2 MAIL CONSOLIDATION

SmartFlow Send service provides a consolidated suite of electronic and physical services across multiple delivery channels. This consolidated service offering provides the following benefits:

- address management across all channels:
  - mailing list accuracy and updating
  - address accuracy analysis on mailing lists to identify deficient addresses
  - address accuracy correction of deficient addresses from a list, plus a detailed report on addresses that cannot be corrected
  - address accuracy certification to prove qualification for certain postage rate incentives
  - address list maintenance (merging and purging address lists, genderizing names, etc.)
- single point of contact across all channels
- single input file transformed into various delivery outputs
- high-resolution printing in black and white with highlight colours and full-colour digital printing available
- production inventory management and climate-controlled storage
- electronic capture of your customers' responses to email messages.

### 2.3.3 WEB-BASED USER INTERFACE

SmartFlow Send service offers you a web-based user Interface where you have the option:

- to view your documents, before or after delivery, exactly as your customers would see them
- to view variety of reports with timely information on mailing and document processing and delivery. These reports are also made available by email.

## **2.4 Benefits**

### **2.4.1 EXPEDITE AND SIMPLIFY**

SmartFlow Send service reduces the time it takes to produce and send transaction mail. We provide a one-stop, single point of contact service that transforms and produces your billing or statement data files into bills, invoices, or statement documents for any physical or electronic delivery method.

### **2.4.2 COST REDUCTION**

SmartFlow Send service provides the following cost-reduction benefits:

- free up assets used in running production facilities and warehousing communication materials
- realize implementation and operating efficiencies through a single interface that provides multiple output channels
- one (1) invoice for all your production services saves on reconciling multiple invoices from multiple suppliers.

### **2.4.3 PRIVATE AND SECURE COMMUNICATION**

Canada Post keeps your data and physical or electronic documents private and secure throughout the production and delivery process in accordance with its privacy commitment to Canadians.

### **2.4.4 LEVERAGE CANADA POST'S NATIONAL NETWORK**

Canada Post has strategically located print sites across Canada to minimize delivery time and a distributed electronic communications network which provides multiple failover systems in case of printer or server failures.

## **2.5 Pricing Information**

To obtain pricing information, contact a Canada Post Sales Representative by email at: [multichannel@canadapost.ca](mailto:multichannel@canadapost.ca) or by calling 1.800.363.4763.

## 3 SMARTFLOW RECOVER SERVICE

SmartFlow Recover service helps you get the most out of delivery by managing what comes back. The service turns returned mail into valuable information that helps you stay connected with customers/contacts.

As an outsourced service, we take over the handling of your return mail and turn paper documents into valuable business intelligence to quickly re-establish your connection with your customers.

### 3.1 Recover Features

The following are some of the SmartFlow Recover service features:

- information capture
- address scrubbing and data distribution
- imaging address block
- cleanse the image
- verify data
- extract and format the data
- return data to business workflows and systems
- re-connection with customers - we can quickly reroute returns according to customer business practices:
  - resending with a corrected address
  - resending to a new contact; or
  - streaming to an alternative channel
- disposal – return mail can be securely destroyed or returned to you. We provide quick and reliable return and disposal service.

**NOTE:** To obtain more information, contact a Canada Post Sales Representative.

## 4 SMARTFLOW RESPOND SERVICE

When the success of business depends on the two-way flow of information, quick and efficient management of response tools is of vital importance. SmartFlow Respond service gets you more out of every customer response through:

- intercepting the response at the earliest possible place in the process
- converting information on business reply cards, applications and other forms sent through the mail to electronic data
- performing analysis
- technology integration with your systems for the return of electronic data
- managing brochure, document or merchandise fulfillment, as well as any other activities needed to successfully complete the transaction with a customer.

**NOTE:** To obtain more information, contact a Canada Post Sales Representative.