Electronic Shipping Tools
Outils Électroniques D'expédition

CANADA POST · POSTES CANADA

Installation and Setup Guide
Electronic Shipping Tools (EST)
Desktop Version

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About Electronic Shipping Tools

Canada Post *Electronic Shipping Tools* is a free, fast and flexible way to prepare your Statements of Mailing and Manifests. Reducing paperwork, saving time and improving billing and transaction accuracy is easy with the *Electronic Shipping Tools*.

The *Electronic Shipping Tools* can be used for both Communication Business and Shipping & Delivery Services mailings, and offer a wide range of features to meet your needs.

Communications Business Features

- Calculate mailing charges as you prepare your Statements of Mailing;
- Unaddressed Admail integrated features for preparing and printing Admail Delivery slips, calculating points of call information and printing container labels;
  Cost centre reporting for PosteCS users.

Shipping & Delivery Services Features

- Calculate mailing charges as you prepare your Manifest;
- Delivery confirmation – including e-mail notification;
- Address notification;
- Labeling options;
- Credit card payment – some restrictions apply;
- Detailed mailing cost reporting for PosteCS users

The *Electronic Shipping Tools* is geared toward improving customer support throughout the entire order process – making it easier and more efficient to get your mailings from anywhere to anyone.

1.0 Getting Started

1.1 Business Requirements

Before you can use the *Desktop* version of the *Electronic Shipping Tools* application, a valid Canada Post **customer number** is required and a **contract number** (if necessary);

To obtain a Canada Post Customer number for Communications or Shipping & Delivery Services, please contact the Canada Post Business Access Hotline at 1-800-260-7678.

To process your order, you require a **User Id and Password**, which can be obtained by calling 1-866-511-0546 or register at the On-line Business Center.

1.2 Software and Hardware Requirements

Internet Access and Browser
To use the desktop version of the *Electronic Shipping Tools*, you need Internet access and a browser to transmit your mailings. Currently, the application supports Netscape® versions 4.7 and above, and Microsoft Internet Explorer versions 5.0 and above.

Adobe® Acrobat® Reader®
The electronic Statement of Mailing (SOM) uses Adobe Acrobat Reader to display and print the Calculation Worksheet, the SOM Preview, and the final SOM. Acrobat Reader version 4.0 or greater is recommended to perform these functions. If you do not currently have Adobe Acrobat Reader installed, you may download a free copy by clicking on the link on the Canada Post website.

Personal Computer Configuration
To use the *Desktop* application, you need:

- Recommended High Speed Internet connection
- Recommended Win 2000/XP, Win98/ME/NT supported
- Recommended Pentium IV 1.2 Ghz or better
- Recommended Pentium III processor
- 256 Mb of RAM or greater
- At least 200 MB free hard drive space
- Laser printer with PCL6 for Manifests & Labels
- 800 X 600 Monitor resolution or greater
- For the Unaddressed Admail Delivery Slip (ADS) functionality, you need a laser printer to print the ADS forms and labels.

1.3   Where Can I Find Additional Information?

More information about *Electronic Shipping Tools* can be found on the Canada Post Web site (http://www.canadapost.ca/business/offerings/eship_tools/can/default-e.asp) or by contacting your Canada Post Sales Representative.

From the Canada Post Web site, you can obtain information about *Electronic Shipping Tools*:

> How Do I (tutorial)
> An Overview of the application
> Benefit/Features
> Desktop vs. Online
> Key Support Documents
> Frequently Asked Questions (FAQs)

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All other trademarks are the property of their respective owners.

1.4   How to Get Your Copy of the Electronic Shipping Tools Application

From the *Electronic Shipping Tools*, you can download the *Desktop* version of the application.

To download the application, follow the instructions presented on the screen or consult the How do I's Double click on the Install exe file when you have successfully downloaded the application from the website. From here you will be directed through the various installation windows that result in the creation of an icon on your desktop. Double click on the VCD (Desktop) icon to configure the application to meet your needs (i.e. printer and output configuration).
If you require technical assistance, please call the Help Desk at 1-800-277-4799.

2.0   InstallAnywhere Windows

After double clicking on the self-extracting Install.exe file, the standard InstallAnywhere windows will guide you through the process of loading the software on the computer.
The InstallAnywhere windows will guide you through the following steps:

> Select the language to use for installation;
> Validate that one printer is setup;
> Validate that sufficient hard drive space to install is available;

Validate that the graphics resolution is set to 800 X 600 or greater;

Load the software (application as well as database) on your local hard drive.

The following window is displayed whenever the Installer (self-extracting file) is launched. This window will unpack the installation files displaying a progress bar. You can cancel the installation at this point by clicking the **Cancel** button.
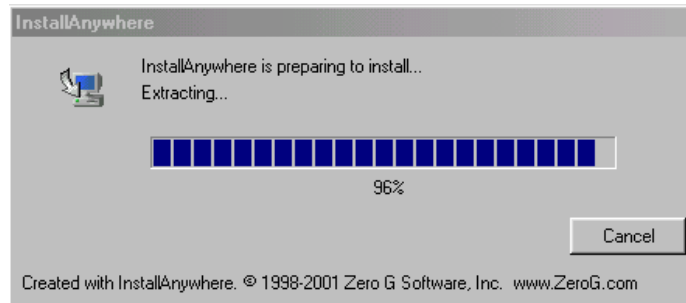

Language Selection Window

This window displays the Canada Post splash screen for the application. It provides you with the choice between English and French for your application. The language list is defaulted to the language set in the operating system of your computer. The **OK** button will confirm the selection and move to the next step.

Introduction Window

This window is displayed if no previous installation exists on your computer. It is recommended that all other applications be closed before proceeding with the installation.
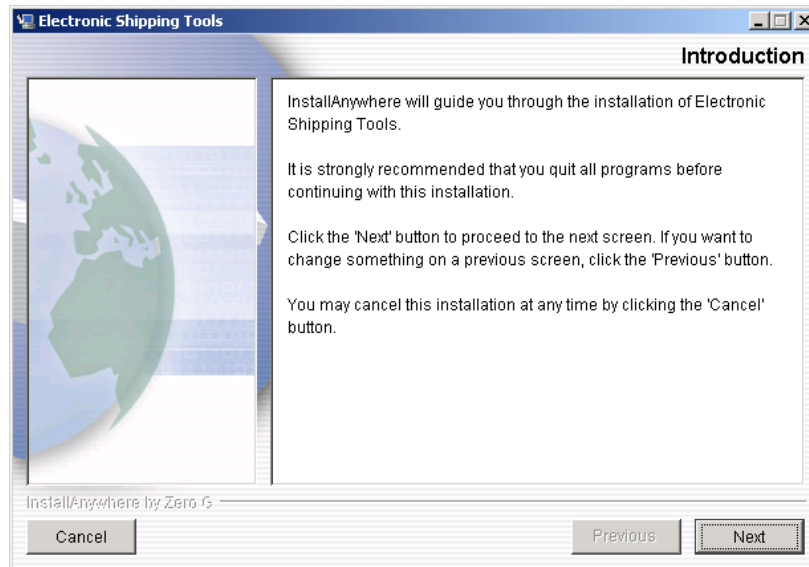
Software License Agreement

This window requires you to accept the License Agreement in order to install and use the *Electronic Shipping Tools* application.

Choose Configuration Window

This window displays the configuration choices. There are three graphical configuration buttons depending on your operating system:

Single User Configuration button (default value);

Client Component of Multi-user Configuration button;

Server Component of Multi-user Configuration button.
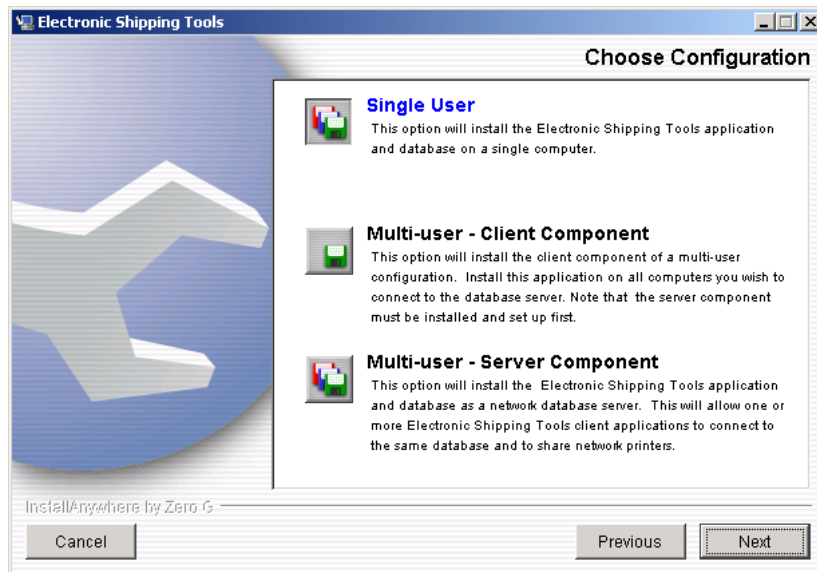
Cancel Installation

You can cancel the installation of the application at any time when you select the **Cancel** button.

Choose Install Folder Window
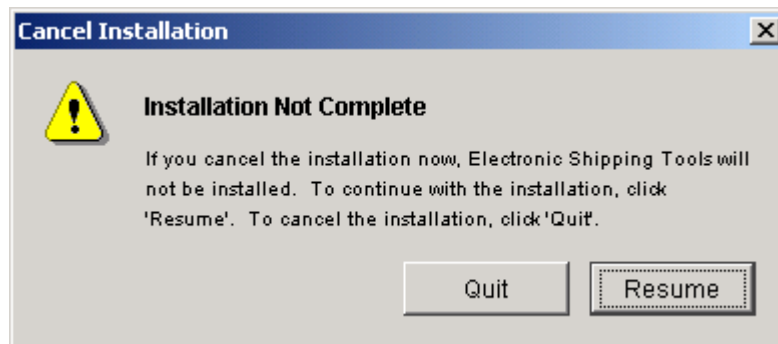
This window is used to choose the installation folder where the application will reside on the computer hard drive. It displays the default installation folder. The install program will create the installation folder (defaults to C:\Program Files\VCD) if it does not exist.
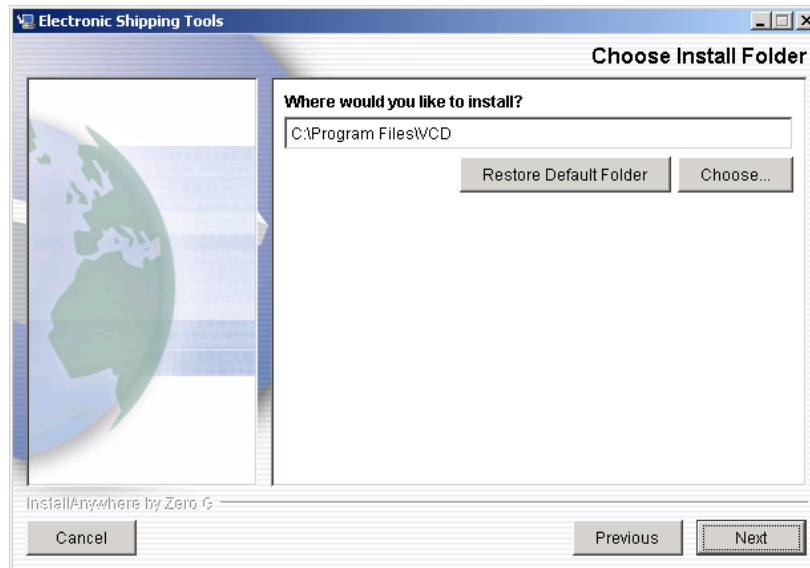
Client Installation Pre-Requisite Window

This window is displayed only in the case of Client installation. It is used to enter the name of the server machine hosting the server application.
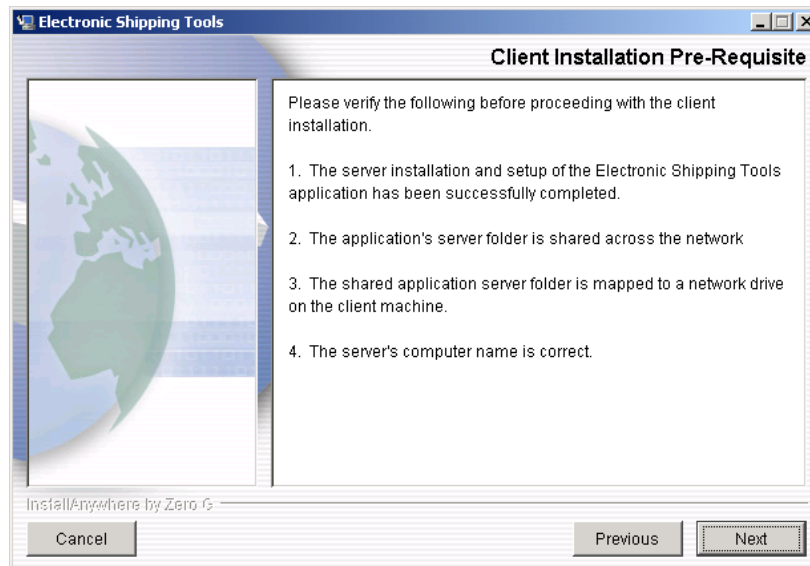
Get Host name Server Application Window

This window is displayed only in the case of Client installation. It is used to enter the name of the server machine hosting the server application.
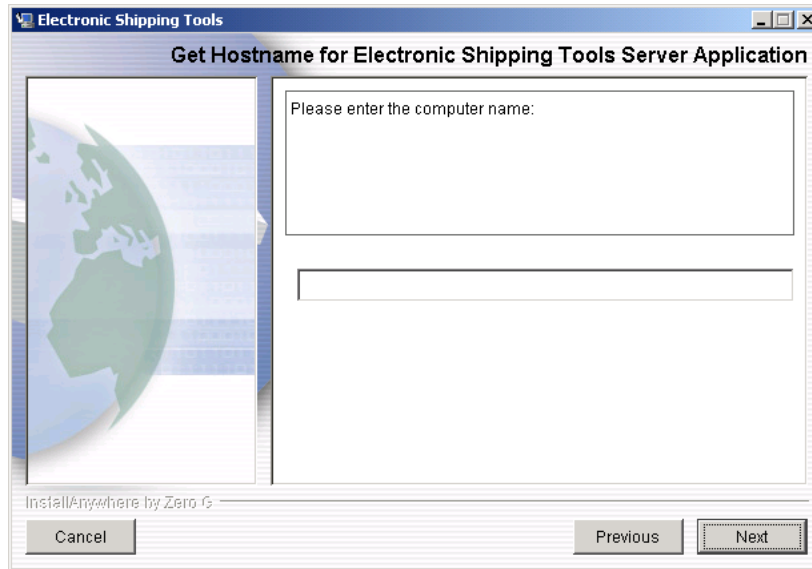
Get Location for the Server Application Window

This window is displayed only in the case of Client installation. It is used to choose the shared server folder where the *Electronic Shipping Tools* application is installed.
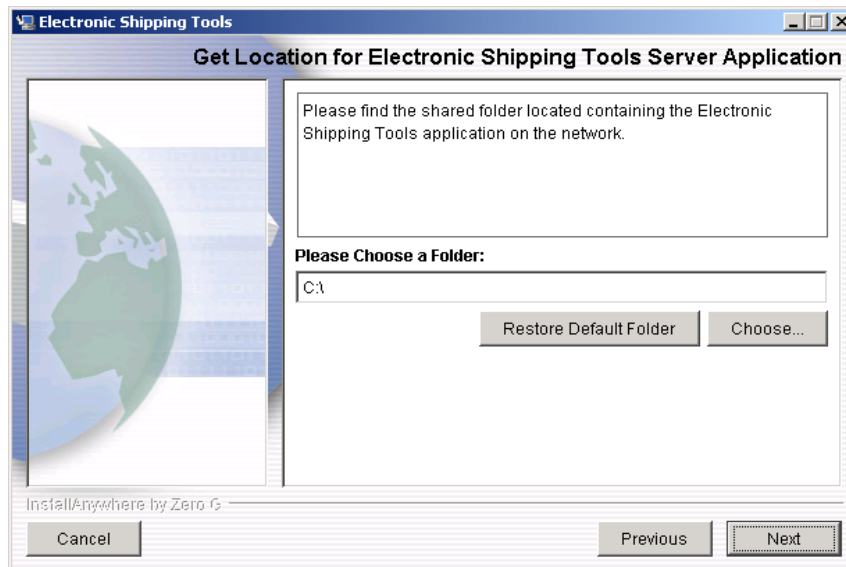
Pre-Installation Summary Window

This is an information window that provides you with a summary of the following installation details:
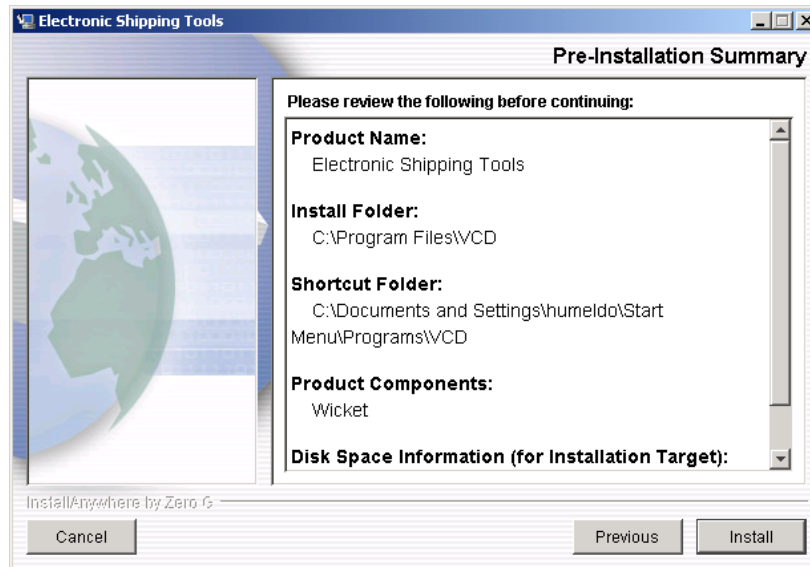
Installation Window

This window shows the installation in progress and displays the names of the installation files along with a progress bar.

Server Installation Window

This window is displayed only in the case of Server installation. It is used to display a checklist of post-installation tasks the network administrator should perform after the installation is completed.
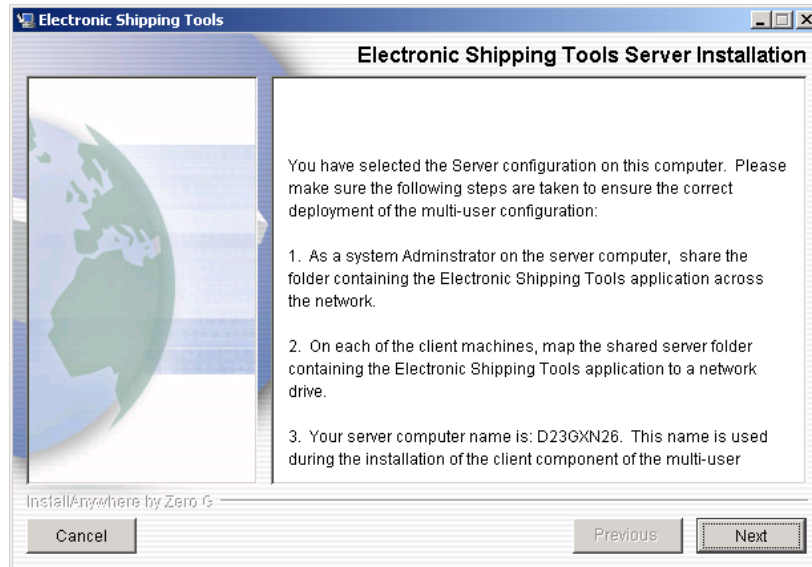
Install Complete Window

This window is displayed once the installation is completed. The text displayed on this window will depend on the selected configuration and whether the installation was successful or not.
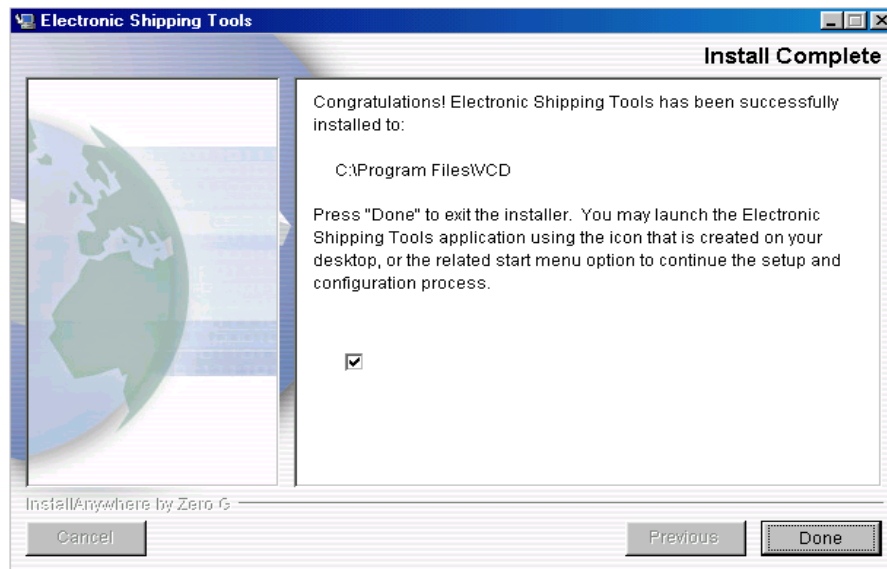
3.0 Configuration Wizard Windows

Double click on the VCD (Desktop) application icon and the Configuration Wizard guides you through the configuration process, which is divided into eight steps:

1. Select Set-up;
2. Configure Proxy Server (if any);
3. Connect to the CPC server;
4. Enter your account and contract information and select services;
5. Download site data from Canada Post;
6. Configure your site preferences;
7. Configure the printer(s) accessible from your workstation; and
8. Define the type of paper for each of your printers and which document prints on which printer.

3.1 Electronic Shipping Tools Configuration Wizard Window

The *Electronic Shipping Tools* Configuration Wizard is displayed whenever the application is launched and the Setup process is incomplete. Normally, this window will only be displayed the first time the application is launched. The *Electronic Shipping Tools* Configuration Wizard briefly explains the configuration process; it further allows you to choose between a **Custom** and **Express** Setups. The Express Setup process will present you with fewer Setup screens and therefore default most of the Setup parameters. Note that you always modify the options and defaults using existing VCD windows after Setup has been completed, if necessary. Press the **Next** button to proceed with configuration. .

Note: The screens presented in this guide reflect the application at the time of print. Actual screens may differ slightly.

If you wish to exit the Setup at any time, select the **Exit Setup** button. You will be asked to confirm that you wish to exit. If you have not completed the configuration of the application, the Configuration Wizard will restart the next time you run the application. In order to use the *Electronic Shipping Tools* application, you must complete the application configuration for your computer.
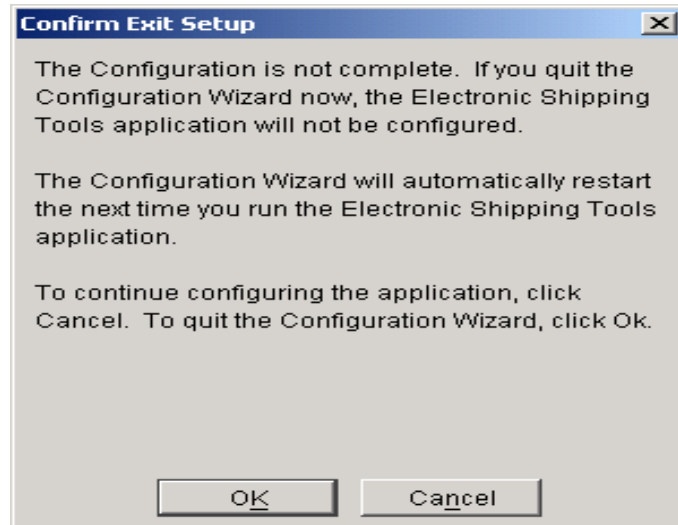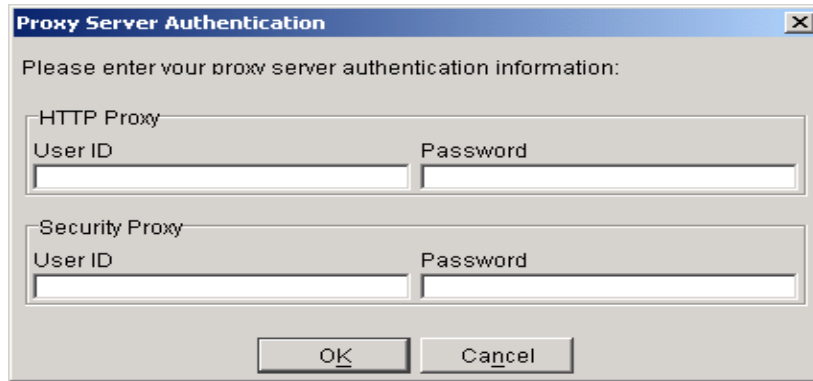
Internet Configuration and Proxy Server Setup (with Custom Set-up ONLY)

This window is part of the Configuration Wizard, which allows you to specify a Proxy Server (if required) during the Setup process. First select the option that reflects your Internet configuration; whether you are connected to the Internet using a dial up account or you are connected through a LAN or high-speed cable. A Proxy server is a server that sits between a client application, such as a Web browser, and a real server. It intercepts all requests to the real server to see if it can fulfill the requests itself. If not, it forwards the request to the real server.

Check the "I use Proxy Server" if you use a proxy server. Your Network Administrator should provide assistance with determining whether or not a proxy server is required.
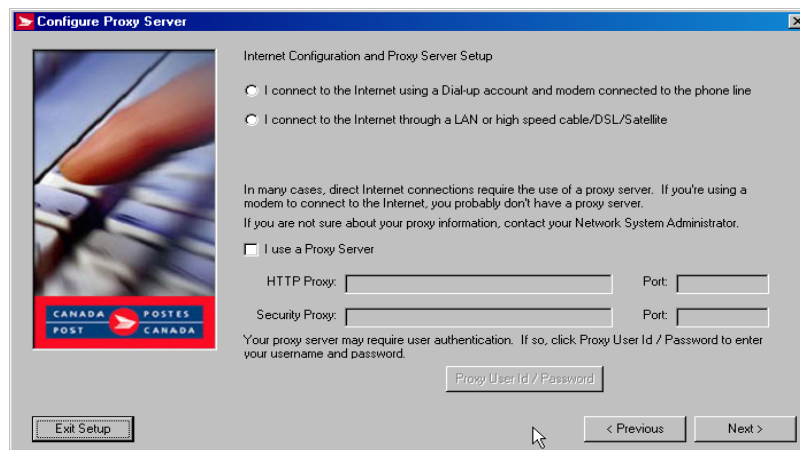
When you check "I use Proxy Server", you will be required to enter the IP address and port of your proxy server (HTTP or Secure server). In addition, your proxy server will require user identification by clicking on the **Authentication** button and entering a valid user id and password.

Proxy Server Authentication dialog box showing:
Please enter your proxy server authentication information:

HTTP Proxy
User ID _____ Password _____

Security Proxy
User ID _____ Password _____

OK   Cancel

Fields

Component	Description
I connect to the Internet using a Dial-up…./ I connect to the Internet through a LAN….	These fields indicate how your Internet is configured and let you select the appropriate connexion.
I use a Proxy Server	This field indicates whether a Proxy Server will be used.
Proxy Server IP Address (HTTP Proxy or Secure Proxy Server)	This field records the IP Address of the Proxy Server for subsequent connections. Numeric with IP Address Data Mask (i.e. xxx.xxx.xxx.xxx where there is a three character maximum between periods)
Proxy Server Port	This field identifies the port number for the Proxy Server.

Command Buttons

The following table describes the Command buttons functions and displays the hot key definitions (by underlining the letter in question).

Command Button	Result of Invocation
Proxy User Id/ Password	Enabled when a proxy server is selected. As part of the proxy server authentication, a valid user id and password must be entered.
Previous	Returns to the previous window.
Next	Closes the current window and moves to next window to continue Setup.
Exit Setup	Opens the Confirm Exit Setup window and closes the window.

Login to the Electronic Shipping Tools Server

This window is used to collect the information required to connect to the *Electronic Shipping Tools* server:

> The User Id and Password that you have obtained from Canada Post;
> Your Customer Number; and
> Your Contract Number, if you have a contract and require access to contracted products.
> Your Contact Name and E-Mail address.

You may also **Mail On Behalf Of** other customers. The information is captured once you click on **Additional Accounts** button

Fields

Component	Description
OBC User Id	This field identifies the User Id you obtained from Canada Post. (max. length of 10 alphanumeric characters).
Password	This field identifies the pre-determined password you obtained from Canada Post. You may change your password for your convenience. Displays asterisks when a value is entered to mask the entries. (max. length of 8 alphanumeric characters).
Customer Number	This field identifies your Customer Number and establishes this number as the Mailed By Customer Number. (max. length of 10 numeric characters).
Contract Number	This field identifies your Contract Number. (max. length of 10 numeric characters).
Contact	This field identifies the name of the person who is associated to the Customer Number

Component	Description
E-Mail	This field identifies the contact's E-Mail address

Command Buttons

The following table describes the Command buttons functions and displays the hot key definitions (by underlining the letter in question).

Command Button	Result of Invocation
Previous	Returns to the previous window.
Next	Closes the current window and moves to next window to continue Setup.
Exit Setup	Opens the Confirm Exit Setup window and closes the window.
Additional Accounts	Allows you to set-up additional customers that you Mailed On Behalf Of

Additional Accounts

This window allows you to add additional customers for whom you may prepare mailings (Mailed On Behalf Of) and permits the Service(s) to be used download to the application.

The Mailed By Customer Number is defaulted in the Mailed on Behalf of Customer Number List and cannot be removed from this list. The Mailed on Behalf of Customer Number List is sorted in ascending order.

Note: If the download process fails, you will be required to re-enter all Customer Numbers you have added to the Mailed on Behalf of list. Customer numbers can be added from within the application from the Main Menu using the Customer Tab from Data Maintenance, Site Information.

This window appears only when the Custom Setup option is chosen.

Fields

Component	Description
Customer Number to be Added to the Mailed on Behalf of List	This field allows you to key in each Customer Number for which you prepare mailings. (10 numeric characters).
Contract Number	For each Customer Number for which you prepare mailings, this field allows you to enter the corresponding contract number for which you are authorized to Mail on behalf of.
Mailed on Behalf of Customer Number List	This portion displays all the information related to the Customer Number added

Command Buttons

The following table describes the Command buttons functions and displays the hot key definitions (by underlining the letter in question).

Command Button	Result of Invocation
Add	Click Add to add a Customer Number to the Mailed on Behalf of Customer Number List.
Remove	Removes the selected Customer Number(s) from the Mailed on Behalf of Customer Number List.

Select Services

This window is displayed for both Custom and Express setups.
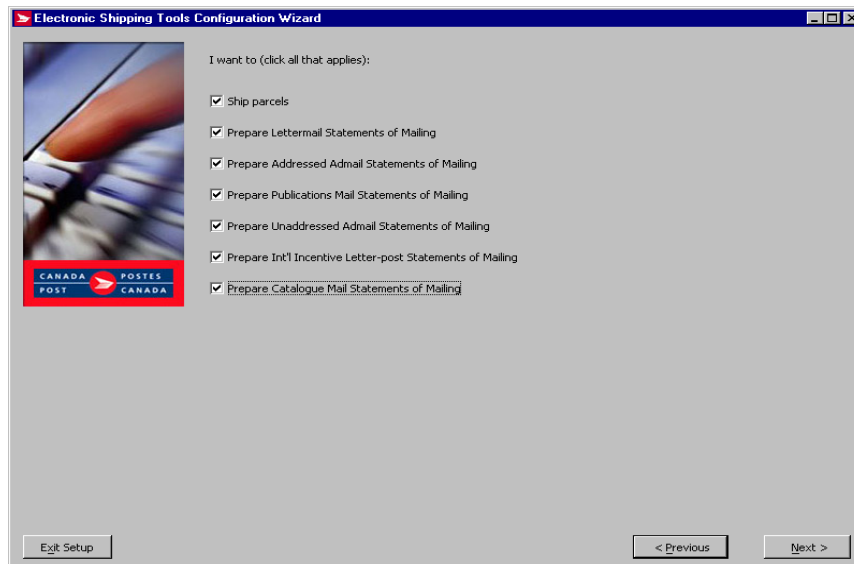
Fields

Component	Description
Services Type Used	The check boxes allow you to select the Service Types you wish to use. You can select all options under Communications and/or Shipping and Delivery Services. The Service Types Used selected determines the type of site data downloaded.

Command Buttons

The following table describes the Command buttons functions and displays the hot key definitions (by underlining the letter in question).

Command Button	Result of Invocation
Previous	Returns to the previous window.
Next	Closes the current window and moves to next window to continue Setup.
Exit Setup	Opens the Confirm Exit Setup window and closes the window.

3.4 Download Site Data

The following window is displayed while the Setup process is updating the *Electronic Shipping Tools* application with reference data. At the end of the download, a status will be provided.

3.5 Configuration of Site Preferences

This configuration window allows you to capture profile and/or configuration information:

> Outlets/Deposit Location Information;
> Software Options, and
> Default Settings

Command Buttons

The following table describes the Command buttons functions and displays the hot key definitions (by underlining the letter in question).

Command Button	Result of Invocation
Select	Select the appropriate Outlet.
Previous	Returns to the previous window.
Next	Closes the current window and moves to the next window to continue Setup.
Help	Opens the Help Window for *Electronic Shipping Tools*.
Exit Setup	Opens the Confirm Exit Setup window and closes the window.

Configuration Window –Deposit Locations/ Outlets Configuration Section

This section allows you to record information about the outlets where you will induct your mail

Fields

Component	Description
Outlet	This field identifies the Outlet you have selected to induct your mailing and shipment.
Postal Code	This field identifies the Postal Code of the Outlet selected.

Command Buttons

The following table describes the Command buttons functions and displays the hot key definitions (by underlining the letter in question).

Command Button	Result of Invocation
Select	Allow you to select an Outlet.

Selection Outlet / Deposit Location

The Select Outlets/Deposit Locations window allows you to:

Select either "RVUs Only", "Major postal facilities only" or "All postal facilities list";

Search for an Outlet by Province & City or Outlet Number. The Outlet is where the mail will be brought for induction into CPC's mail stream;

Highlight an Outlet and press Apply to automatically populate the Outlets/Deposit Locations setup screen;

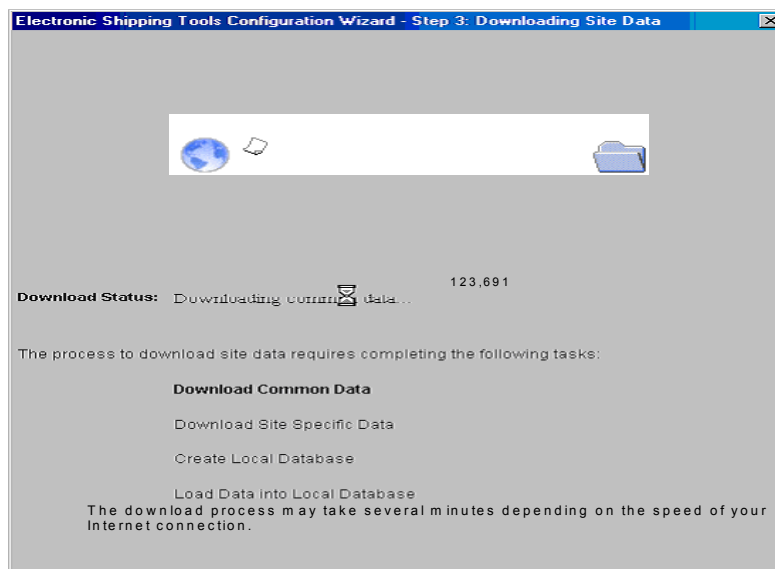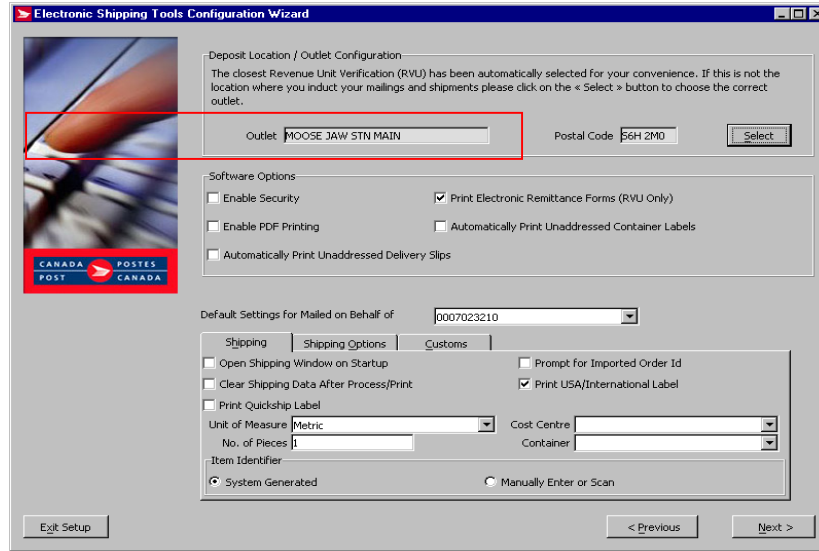If required, repeat process again for Shipping and Delivery Services.
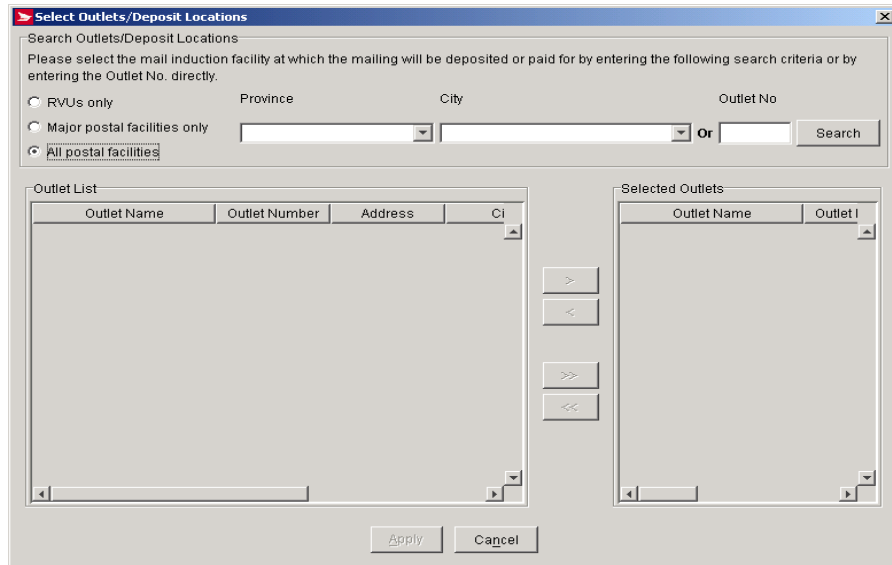
Command Buttons

The following table describes the Command buttons functions and displays the hot key definitions (by underlining the letter in question).

Command Buttons	Result of Invocation
Search Outlets/Deposit Locations	Select "RVUs Only", "Major postal facilities only" or "All postal facilities" to search for the Outlet/Induction Point where your mailing will be deposited.
Province	Select a Province from the drop down list to perform a search by province.
City	Select a City from the drop down list.
Outlet Number	If you know the Outlet Number, enter the 4-digit number directly into the field and press the Search command button.
Search	This command button will extract all Outlets that match the Outlet Number (if entered), the province and city (if both entered) or the province only and then populates the Outlet list with matching records.
Outlet List	Displays the Outlet details and allows you to select an Outlet and see the details about that Outlet
Apply	Highlight the selected Outlet and press this command button to automatically populate the Induction Point setup screen.
Cancel	Closes Window.

Configuration Window – Software Options Section

The Software Options section allows you to register your system preferences.

Fields

Component	Description
Enabled EST Security	Select or deselect option. If enabled, you will be required to Sign In to the application with a User Id and password. See the Application Security section.
Enable PDF Printing	Enables PDF format printing using Acrobat Reader. Acrobat Reader version 5.0 **must** be installed prior to selecting this option to optimize printing capacity. Acrobat Reader can be downloaded by visiting the *Electronic Shipping Tools* home page on the Canada Post website or the Adobe website (http://www.adobe.com/products/acrobat/readstep.html).
Automatically Print Unaddressed Admail Delivery Slips	Select this option to automatically print Unaddressed Admail Delivery Slips when printing.
Print Electronic Remittance Forms (RMUs Only)	Select this option to print Electronic Remittance Forms.
Automatically initiate printing of Unaddressed Admail container labels	Select this option to automatically print Unaddressed Admail container labels when printing

Configuration Window –Default Settings Section

Default Settings section allows you to establish default settings for your shipments. This section is divided into three tabs: Shipping, Shipping Options, and Customs.

The Default Settings are associated to a Mailed On Behalf Of number selected from the drop down list

Default Settings – Shipping Tab

Fields

Component	Description
Open Shipping Window on Start-up	Select this option to have the Shipping window automatically open when you start the application.
Prompt for Order ID	Select this option if you want an Imported ID supplied for every shipping transaction. The prompt appears when you click the **Process/Print** button.
Clear Shipping Data after Process/Print	Select this option if you want the application to automatically clear the data entered in the Ship To section and Size & Weight field from the Parcel Information Section (Shipping Window) after processing a transaction. Note that the Cost Centre value and checkbox selections, if any, remain as is.
Print USA/International label	Select this option to automatically print address labels for USA and International Shipments.
Print Quickship label	Select this option to automatically print address labels when using the Quickship option to process a parcel. Quickship normally suppresses the label printing, on the assumption that your label is produced using other means.
Unit of Measure	This field allows you to select a system default for the preferred measurement unit which is Metric. You can change this default to Imperial.

Component	Description
Cost Centres	This field allows you to select the cost centre to which to charge the cost for the shipment from the drop-down list. The default is the cost centre used in the previous shipping transaction but can be changed. This is an optional field.
No. of Pieces	This field allows you to enter the number of units to be shipped under the multi-piece shipment method. The field is blank and cannot be less than 1 or exceed 999.
Container	This allows you to select predefined container types (using *Electronic Shipping Tool's* **Container Editor**), a list of all available container types is presented on this drop-down list. Select the appropriate container type from the drop-down list.
System Generated	Select this option to have the application automatically generate an identifier (i.e. barcode) for shipments with delivery confirmation selected.
Manually Enter or Scan	Select this option to have the responsibility of entering the identifier (i.e. barcode) for shipments with delivery confirmation selected. If you do not enter one, the application prompts you for one when you click Process/Print.

Default Settings – Shipping Options Tab

The following default settings affect the Service tab of the Shipping window.

Fields

Component	Description
Send E-Mail Default Values	Select this option to Indicate you wish to send E-Mail Notification message(s). E-Mails will be sent only once the order has been transmitted successfully to Canada Post.
Retain shipping service options	Select this option to keep the service options selected for a Service Type between shipments per workstation. You will get warning messages to remind you that this option is set.

Component	Description
Coverage Value	This field allows you to enter a value to be the default amount if the coverage service option is selected.
Include Shipping cost in COD Collection Amount	Select this option if you wish to include the shipping cost in the COD Collection Amount
COD Collection Amount	This field allows you to enter a value to be the default amount if the COD service option is selected.
COD Method of Collection	Select the required method of collecting the COD amount: cash, cash or cheque, or post-dated cheque.

Default Settings – Customs Tab

The following default settings affect the Customs window.

Fields

Component	Description
Retain Customs Data	Select this option to have the application keep the customs data, including the goods selected, between shipments per workstation. Remember that the Service Type field defaults to what as chosen for the previous transaction for a particular country (Canada, USA, or International). O However, once you change this Service Type, the customs data is permanently cleared (i.e. you cannot retrieve it by reselecting the Service Type).
Reference Number	This field allows you to enter a reference number to be automatically associated with a shipment.
CAD to USD	This field allows you to enter the values of all predefined goods and those entered for one-time use via the Maintain Goods window are in Canadian currency. You can enter an exchange rate that will automatically be used to calculate the Customs Value in US currency if USD is entered as the Customs Currency.

Component	Description
Currency	This field allows you to enter a currency (i.e. CAD, USD) to be automatically used for a shipment.
Duty and Tax	This field allows you to enter the value of the calculated Duty rate and the tax that applies to the item.
Value	This field allows you to enter a customs value to be automatically used for a shipment. This default applies only if the field is enabled for the Service type chosen.
Description	This field allows you to enter a (general) description to be automatically used for a shipment. This default applies only if the field is enabled for the Service Type chosen.
Reason for Export	Select a reason for export from the drop-down list to be automatically used for a shipment. The default applies only if it is available for the Service Type chosen.
Non Delivery Instructions	Select non-delivery instructions from the drop-down list to be automatically used for a shipment. This default applies only if the field is enabled for the Service Type chosen.

3.6   Configuration of Printers

The Printer Configuration task allows you to identify the printer(s) to be used with the application. Printers can be added, deleted or modified. For each printer, indicate the type (Laser, Dot Matrix or Thermal) and the media (plain paper, Thermal paper or pre-printed Dot-Matrix forms) that needs to be configured.

Additional printers can be added, deleted or modified from the Main Menu option Tools, Printer Configuration after installation.
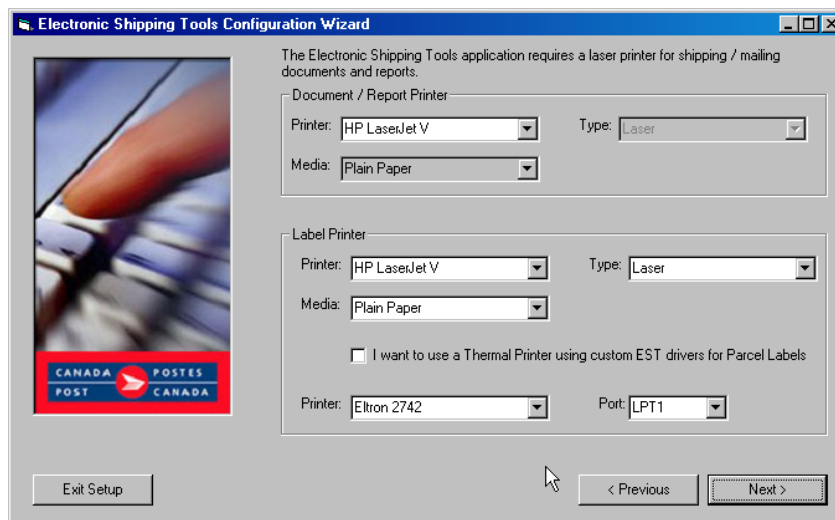
Fields

Document / Report Printer: This section displays a listing of all printers currently configured for this application. The list is sorted alphabetical and the first item is highlighted when the window is opened.

Component	Description
Printer	This field allows you to select a printer that will print your documents/reports
Type	This field allows you to select the type of printer This field is populated with the type of printer initially selected. If configuring a new printer, this field will be cleared and you will be given the choice of selecting one of three types: Dot Matrix, Laser or Thermal.
Media	This field displays the media (paper) type that is currently associated with the printer.

Label Printer

This section allows your input area to define the available printers for label printing.

Component	Description
Printer	This field allows you to select a printer for labels. When adding a new printer, the field will be cleared and the drop-down list will present you with a choice of all Windows configured printers on their system, which have not already been configured for the *Electronic Shipping Tools* application. This field is mandatory.
Type	Type of printer selected and used to validate the various media types to be used. This field is populated with the Type of printer initially selected. If configuring a new printer, this field will be cleared and you will be given the choice of selecting one of three types: Dot Matrix, Laser or Thermal.
Media	The media (paper) type that is currently associated with the printer. This field is populated with Installed Media of the selected printer. If configuring a new printer, this field will be cleared and you will be given a choice of various media types based on the type of printer selected.
I want to use thermal printer for Parcel labels	Select this option when you wish to send your parcel labels to the thermal printer
LP1/LP2	Select the port associated with selected printer. When configuring a new printer, it will be automatically populated when the Printer Name is chosen. (Windows has already been configured with this information, so this field is in reading mode only)

Command Buttons

Command Button	Result of Invocation
Previous	Returns to the previous window.
Next	Closes the current window and moves to next window to continue Setup.
Exit Setup	Opens the Confirm Exit Setup window and closes the window.

3.7 Configure Barcode Ranges and Output

The **Barcode Range Maintenance** window is used during the Setup process if **Shipping and Delivery Services** has been selected. During the Setup process, the following window will be displayed in order to enable the user to enter the Barcode Range information. Selecting the Next button will initiate downloading Barcode Ranges for the Barcode Groups that are centrally managed; plain paper and thermal.

The Barcode Range Maintenance window maintains barcode group ranges in your application. Centrally and locally managed barcode groups share this window. For locally managed barcode groups, this window is used to enter a range of item reference numbers associated with barcodes used on pre-printed labels. For the Centrally managed barcode groups, the window displays the downloaded barcode ranges from the central database on the server and only the Frequency field can be modified, if desired. The frequency assures that the downloaded quantities are maintained inline with the user requirements. *(See Appendix B – Barcode Replenishment Table.)*

To maintain barcodes after the successful setup, from the Main Menu select Tools, Barcode Range.

The Barcode Ranges list shows only one range for each (central or local) barcode group. A locally managed barcode group has only one range. Once depleted, this range will be cleared, turned Active and re-populated with new input by the user in order to create a new range. For Centrally managed barcode groups, Active and pending ranges are downloaded from the central server database. However, only the Active range will be displayed in the Barcode Ranges list. In case all barcode ranges of the subject barcode group are depleted, the last Depleted range will be displayed in the list.

Barcode groups with no ranges are displayed in the Barcode Range list. In this case, only the barcode group name and frequency (if it is non-null) are displayed in the Barcode Ranges list.

Fields

Component	Description
Barcode Ranges	Display only area for users that is scrollable for Barcode Range selection.
Barcode Range Name	Description field that displays the barcode group type description sorted in alphabetic order. Display only.
Centrally Managed	Displays a check mark (✓) if this is a central barcode group (User Entered Indicator is false), centrally managed by the Administrator. Display only.
Status	Current status of the selected barcode range. E.g. Active, Depleted. Display only.
Start	First item identifier of the range, in the following format: XX 999 999 999 XX. Display only.
End	Last item identifier of the range, in the following format: XX 999 999 999 XX. Display only.
Frequency	Replenishment frequency size. Display only.
Status	Current status of the selected barcode range. E.g. Active, Depleted. Repeated from above for information purposes only.
Start	First identifier of the range (lower boundary). Modifiable field. Enabled only for locally managed barcode groups.
End	Last identifier of the range (upper boundary). Modifiable field. Enabled only for locally managed barcode groups.
Next Available	Next available identifier (the next value to be used). Modifiable field. Enabled only for locally managed barcode groups.
Frequency	The value entered in the Frequency field is used to define which minimum threshold and replenishment size is to be used by the application. For example, a value of 55 in the Frequency field will mean that the minimum threshold is 400 and the replenishment size is 10 000 (for the Thermal Printer barcodes). Modifiable field. Enabled only for centrally managed barcode groups.

Command Buttons

The following table describes the Command buttons functions and displays the hot key definitions (by underlining the letter in question).

Command Button	Result of Invocation
Save	The barcode range data is saved and displayed in the Barcode Range list and this new entry is highlighted.
Clear	Clears the Start, End and Next Available fields and sets the focus on the Start field. It also sets the Status to Active and displays it. Only enabled for locally managed barcode groups.
Back	Returns to the previous window.
Next	Closes the current window and moves to next window to continue Setup.

Command Button	Result of Invocation
Help	Opens the Help Window for *Electronic Shipping Tools.*
Exit Setup	Opens the Confirm Exit Setup window and closes the window.

The **Output Configuration** task allows the user to associate the printer(s) and Barcode Types to be used with the various Document Types in the application. In this window the user selects a Document Type and associates it to an available printer and Barcode type.

Note: Printer Configuration must first be completed.

After successful setup, you can modify the output configuration from the Main Menu by selecting Tools, Output Configuration. *(For list of valid media types for each document type see Appendix A – Configure Output.).*
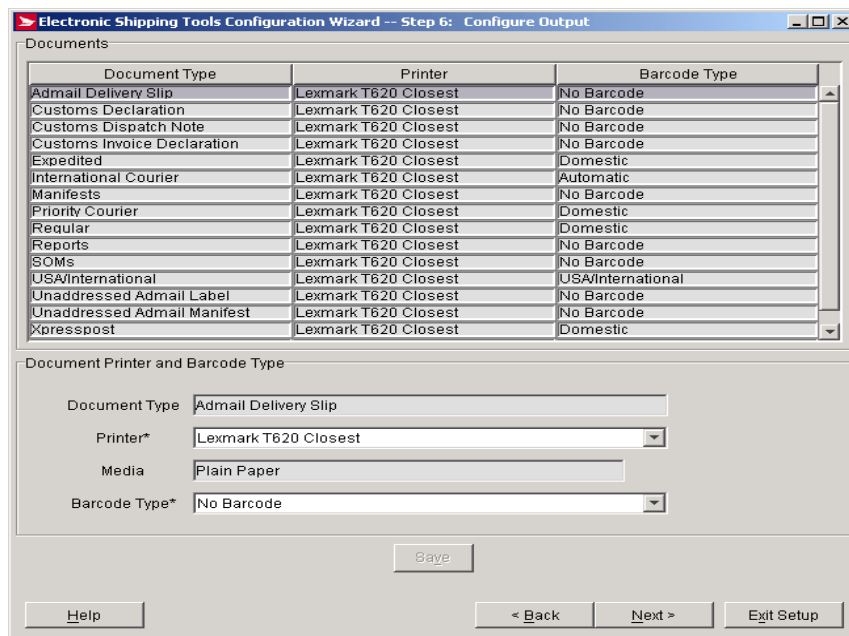
Fields

Component	Description
Documents	This list displays summary information about all currently configured document types. The list is sorted alphabetically and the first item in the list is highlighted when the window is opened.
Document Type	The Document Type will be table driven from the local database and will display all Document Types within the application. Display only.
Printer	The printer currently associated with the corresponding Document Type. Display only.
Barcode Type	The Barcode Type currently associated with the corresponding Document Type. Display only.

Component	Description
Document Printer and Barcode Type	The user input area to associate the Printer and Barcode Type to the selected Document Type.
Document Type	Displays the Document Type selected in the Documents Group Box. Display only.
Printer	The Printer of the selected Document Type will be displayed (if one has already been configured for the selected Document Type). The drop-down list will display a list of printers configured on the users workstation that support the Media Type of Document Type selected. If there is only one printer configured on the workstation, it should be defaulted for all Document Types (for which it is a valid selection). If there is more than one printer configured, then blank should be defaulted. Defaulting blank will help avoid the entry of an incorrect printer.
Media	This field is for information purposes only and will display the Media currently associated with the selected Printer. (From Printer Configuration) Display only.
Barcode Type	A table driven field presenting the user with a list of barcode types available with the Document Type selected. If there is no Printer selected, this field should remain blank.

Command Buttons

The following table describes the Command buttons functions and displays the hot key definitions (by underlining the letter in question).

Command Button	Result of Invocation
Save	Saves the Document Type/Barcode Type for a given Printer
Back	Returns to the previous window.
Next	Closes the current window and moves to next window to continue Setup.
Help	Opens the Help Window for *Electronic Shipping Tools.*
Exit Setup	Opens the Confirm Exit Setup window and closes the window.

3.8 Configuration of Scale (For Custom Setup ONLY)

If you chose the Custom setup in section 3.1, you will need to complete this form.

Fields

Component	Description
I have a digital scale connected to my PC	Select this option if you have a digital scale attached to your computer for use with the VCD application.
Scale	Select an appropriate scale from the list of all pre-defined scales available.
Baud	Select an appropriate baud rate from the list of all pre-defined baud rates available.
Port	Select an appropriate port from the list of all pre-defined ports available.
Data Bits	Select an appropriate Data Bit from the list of all pre-defined Data Bit values available.
Parity	Select an appropriate Parity value from the list of all pre-defined Parity values available.
Top Bits	Select an appropriate Stop Bit from the list of all pre-defined Stop Bit values available.
Manual RTS/CTS handshake	Select this option to indicate that an older model Pitney Bowes scale J071 is in use.
A217/218 Native Mode	Select this option to indicate that a Pitney Bowes scale model A217 is in use.
Pitney Bowes (Mettler)	Select this option if you have an Pitney Bowes (Mettler)

Command Buttons

Command Button	Result of Invocation
Previous	Returns to the previous window.
Next	Closes the current window and moves to next window to continue Setup.
Exit Setup	Opens the Confirm Exit Setup window and closes the window.

3.9 Completion of Configuration

This window is displayed when you have completed the configuration process.

Command Buttons

The following table describes the Command buttons functions and displays the hot key definitions (by underlining the letter in question).

Command Button	Result of Invocation
OK	Click OK to continue

Congratulations! You can now use the *Electronic Shipping Tools* application to prepare your mailings.

Confirm Exit Setup Window

This window is displayed any time you select the **Exit Setup** button during the configuration process

Fields

Command Button	Result of Invocation
OK	Click OK to exit Setup
Cancel	Click Cancel to remain in Setup

4.0 Application Security

System Administrators can define the access privileges of individual users at the time of configuration. When configuring a user in Step 4 – **Configure your Site Preferences**, the System Administrator can Security Enable a user by checking the appropriate box. By activating this option users must sign in to the application with a valid user ID and password before preparing a mailing.

The Administrator can further limit access to the application using the Security – User Profile option available from the Main Menu. The User Profile window allows the Administrator to:

Add a new User Profile to the local database;

Modify an existing User Profile;

Delete a User Profile from the User Profile list;

Maintain preferred language and access privileges.

Select Security option from the Main Menu to access the User Profile function.

Fields

Component	Description
First Name	Enter the User's first name. Maximum of 18 characters.
Last Name	Enter the User's last name. Maximum of 40 characters.

Component	Description
User ID	Enter the assigned User ID. Maximum of 8 characters.
Password	Enter the password associated with the User ID. Maximum of 9 characters.
Confirmation	Re-enter the password to confirm that is correct.

Command Buttons

The following table describes the Command buttons functions and displays the hot key definitions (by underlining the letter in question).

COMMAND BUTTON	RESULT OF INVOCATION
User Profile list	Select a User Profile; Display User Profile detail information in the User Profile information section.
Delete	Delete Selected User Profile in the User Profile List View from the local database.
Reset Password	Resets the Password of the selected User Profile. The Password is set equal to the User Id. Passwords can be a maximum of 9 characters.
New	Allows you to create a New User Profile in the local database.
Save	Saves the New User and displays the user in the User Profile List.
Close	Closes the window and returns to the Main Menu.

Access Privileges *(See Appendix C – Functions and Access Privileges)*

OPTION	ACCESS PRIVILEGE
Administration	Allows the user to perform system functions such as hardware set-up, user set-up, etc.
Address Book	Allows the user to add customers to Address Books, or to add or delete Address Books.
Trace Queries	Allows the user to initiate delivery confirmation queries.
Shipping	Allows the user to create, modify or delete orders.
Reporting	Allows the user to generate and print reports.

Appendices

Appendix A – Configure Output

The following table defines the valid media types for a given document type, i.e. the media on which the different document types can print.

Consult the following tables for an overall of the Address labels and Printing format available.
It may vary with the Printer configuration, the destination of the shipment and/or the service used

Service (English / Français)	Labels/Étiquettes	Indicator/Indicateur
Regular Parcel Piece Rated/ Colis régulier Regular Parcel Piece/Kilo Flat Rate Regular	Plain Paper/Papier Thermal/Thermique Pre-Printed/Pré-imprimé COD Thermal/CR thermique	3
Expedited Parcel Piece Rated/ Colis accéléré Expedited Parcel Piece/Kilo Expedited Parcel Flat Rate	Plain Paper Thermal/Thermique Pre-Printed/Pré-imprimé COD Thermal/CR thermique	2
Xpresspost Piece Rated/ Xpresspost Xpresspost Flat Rate Xpresspost PP Induction	Plain Paper Thermal/Thermique Pre-Printed/Pré-imprimé COD Thermal/CR thermique	1
Air Stage Freight Nutritious Perishable/ Aliments nutritifs périssables	Plain Paper/Papier Thermal/Thermique Pre-Printed/Pré-imprimé	None
Air Stage Freight Other Food/ Omnibus autres aliments	Paper/Papier Thermal/Thermique Pre-Printed/Pré-imprimé	None
Air Stage Freight Non Food Items/ Omnibus articles non aliments	Domestic Paper/Papier Thermal/Thermique Pre-Printed/Pré-imprimé	None
Priority Courier Piece Rated / Messageries prioritaires Priority Courier Flat Rate Priority Courier PP Induction	Plain Paper Thermal/Thermique Pre-Printed/Pré-imprimé COD Thermal/CR thermique	P

Service (English / Français)	Labels/Étiquettes	Indicator/Indicateur
Purolator International Courier PuroLetter PuroPak	Purolator Bill of Lading Plain Paper/ Connaissement Papier	None
USA Small Packets Air/ Petits paquets par avion International Small Packets Air	Plain Paper/Papier Thermal/Thermique	None
USA Small Packets Surface /Petits paquets surface International Small Packets Surface	Plain Paper/Papier Thermal/Thermique	None
International Parcel Air/ Par avion	Plain Paper/Papier Thermal/Thermique	None
International Parcel Surface/ Surface	Plain Paper/Papier Thermal/Thermique	None
Commercial Expedited Parcel- USA/ Commercial accélérés É.-U.	Plain Paper/Papier Thermal/Thermique	4
Expedited Parcel – USA/ Colis accéléré É.-U	Plain Paper Thermal/Thermique	2
Xpresspost USA/ Xpresspost É.-U. Xpresspost USA Prepaid	Plain Paper/Papier Thermal/Thermique Pre-Printed/Pré-imprimé	1
Xpresspost International/ Xpresspost International	Plain Paper/Papier Thermal/Thermique	1

Appendix B – Barcode Replenishment Table

The value entered in the Frequency field of the Maintain Barcode Ranges window is used to define which minimum threshold and replenishment size is to be used by the application. For example, a value of 55 in the Frequency field of the barcode group USA/International will mean that the minimum threshold is 125 and the replenishment size is 750 for USA/International.

The following is a list of the initial values of the Barcode Replenishment table.

Barcode Group Type Name	Minimum Frequency	Maximum Frequency	Minimum Threshold	Replenishment Amount
International Parcel – Insured	1	50	25	150
International Parcel – Insured	51	250	125	750
International Parcel – Insured	251	500	250	1500
International Parcel – Insured	501	4000	2000	12000
International Parcel – Insured	4001	20000	2000	12000
International Parcel – Insured	20001	999999999	2000	12000
International Parcel – Non Insured	1	50	25	150
International Parcel – Non Insured	51	250	125	750
International Parcel – Non Insured	251	500	250	1500
International Parcel – Non Insured	501	4000	2000	12000
International Parcel – Non Insured	4001	20000	2000	12000
International Parcel – Non Insured	20001	999999999	2000	12000
International Courrier (USA)	1	10	5	30
International Courrier (USA)	11	50	25	50
International Courrier (USA)	51	100	50	50
International Courrier (USA)	101	1000	50	50
International Courrier (USA)	1001	10000	500	100
International Courrier (USA)	10001	999999999	500	100

Barcode Group Type Name	Minimum Frequency	Maximum Frequency	Minimum Threshold	Replenishment Amount
International Courrier (International)	1	10	5	30
International Courrier (International)	11	50	25	50
International Courrier (International)	51	100	50	50
International Courrier (International)	101	1000	50	50
International Courrier (International)	1001	10000	500	100
International Courrier (International)	10001	999999999	500	100
Xpresspost USA	1	20	10	60
Xpresspost USA	21	50	25	150
Xpresspost USA	51	100	50	300
Xpresspost USA	101	1000	500	3000
Xpresspost USA	1001	10000	500	3000
Xpresspost USA	10001	999999999	500	3000
Xpresspost International	1	20	10	60
Xpresspost International	21	50	25	150
Xpresspost International	51	100	50	300
Xpresspost International	101	1000	500	3000
Xpresspost International	1001	10000	500	3000
Xpresspost International	10001	999999999	500	3000
Commercial* Expedited Parcel – USA	1	20	10	60
Commercial* Expedited Parcel – USA	21	50	25	150
Commercial* Expedited Parcel – USA	51	100	50	300

Barcode Group Type Name	Minimum Frequency	Maximum Frequency	Minimum Threshold	Replenishment Amount
Commercial* Expedited Parcel – USA	101	1000	500	3000
Commercial* Expedited Parcel – USA	1001	10000	500	3000
Commercial* Expedited Parcel – USA	10001	999999999	500	3000
Expedited Parcel – USA	1	20	10	60
Expedited Parcel – USA	21	50	25	150
Expedited Parcel – USA	51	100	50	300
Expedited Parcel – USA	101	1000	500	3000
Expedited Parcel – USA	1001	10000	500	3000
Expedited Parcel – USA	10001	999999999	500	3000

Appendix C – Functions and Access Privileges

For the System Administrator, the following are the functions and access privileges that can be setup in the Security – User Profile section when assigning User Ids.

Function	Administration	Address Book	Delivery Confirmation Queries	Shipping	Reporting	All
Maintain Order Entry – Open	X			X		
Maintain Order Entry – Finalize	X			X		
Maintain Order Entry – Transmit/Print	X			X		
Maintain Order Entry – Reprint	X			X		
Maintain Order Entry – Move	X			X		
Maintain Order Entry – Delete	X			X		
Maintain Order Entry – Exit						X
File – New Shipment	X			X		
File – New Manifest	X			X		
File – New SOM	X			X		
File – New SOM – Lettermail ^{TM}	X			X		
File – New SOM – Addressed Admail ^{TM}	X			X		
File – New SOM – Publications Mail	X			X		
File – New SOM – Unaddressed Admail ^{TM}	X			X		
File – New SOM – Int'l/U.S.A Letter-post	X			X		
File – New SOM – Catalogue Mail	X			X		
File – Open	X			X		
File – Move	X			X		
File – Delete	X			X		

Function	Administration	Address Book	Delivery Confirmation Queries	Shipping	Reporting	All
File – Exit						X
Customer (MoBo List)	X	X		X		
Security – User Profile [1]	X					
Data Maintenance – Order Items	X			X		
Data Maintenance – Order Items - Import	X			X		
Data Maintenance – Order Items - Maintain	X			X		
Data Maintenance – Cost Centre	X			X		
Data Maintenance – Address Book	X	X		X		
Data Maintenance – Distribution List of Clients	X	X		X		
Data Maintenance – Distribution List of Imported Orders	X	X		X		
Data Maintenance – Containers	X			X		
Data Maintenance – Pre-defined Goods	X			X		
Data Maintenance – Contract Number Alias	X			X		
Data Maintenance – Salutations	X			X		
Data Maintenance – Site Information	X					
Data Maintenance – Customer Info.	X	X		X		
Data Maintenance – Client	X	X		X		
Reports – Reports	X				X	

[1] This menu option is enabled when the site application option 'Security Enabled' has been selected.

Function	Administration	Address Book	Delivery Confirmation Queries	Shipping	Reporting	All
Reports – Delivery Confirmation	X		X			
Tools – Search/Manage Orders	X			X		
Tools – Scale Configuration	X					
Tools – Eltron Configuration	X					
Tools – Printer Configuration	X					
Tools – Output Configuration	X					
Tools – Purging	X					
Tools – Order History Export	X			X		
Tools – Barcode Range	X			X		
Tools – Check for Application, Data, and Barcode Update	X		X	X		
Tools – Sign In						X
Tools – Sign Out[2]						X
Window						X
Help – Help						X
Help – About						X

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[2] When a User log off, all menu items are disabled with the exception of the following: Exit sub-menu from the File menu, Sign In sub-menu from the Tools menu, and the Help menu.