



## **Electronic Shipping Tools Application (EST)**

### **Shipping and Delivery Services User Guide**

#### ***Desktop Version***

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# 1.0 Introduction

Available free-of-charge, the *Electronic Shipping Tools (EST)* application provides greater convenience in preparing and processing Manifests for mailing with Canada Post. Customers download the version of the Electronic Shipping tools to prepare items and documentation offline to be transmitted later. The *Electronic Shipping Tools* offers enhanced features and will reduce paperwork, save time, and improve billing/transaction accuracy.

A sample screen shot follows each main Window for visual reference purposes. The Electronic Shipping Tools is dynamic: the appearance will differ depending on the display settings in your Windows operating system.

When you successfully transmit an electronic order and apply a bar coded shipping label to your items, you are entitled to the automation incentive, which is 3%. It applies to Shipping and Delivery Services shipments both within Canada and Internationally. This automation incentive is only available to customers that use their own computer equipment along with *Electronic Shipping Tools*.

A pop-up message indicates the savings you receive as a result of the Automation discount.

Please note that the automation incentive does not apply to options (for instance, C.O.D. and Delivery Confirmation, etc.) and is applied before taxes and fuel surcharge.

For more details on any aspect of the application, contact the *Electronic Shipping Tools* Help Desk weekdays from 7:00 am to 8:00 pm (Eastern Standard Time) at 1-800-277-4799. For more details about Canada Post products and services, please visit the Canada Post website at [www.canadapost.ca](http://www.canadapost.ca), see the Canada Postal Guide, or contact your Canada Post Sales Representative.

## New Connection on Start-up

The Desktop version of Electronic Shipping Tools (EST) is based on highly synchronized data related to your contract with Canada Post. In order to ensure your mailings and your invoices matches, it's important that you keep your Desktop application up to date.

To help ensure you receive all the updates you need to keep your Desktop version current, the Communication Status Notification page requires that you establish a daily connection with the EST server before creating Statements of Mailing (SOMs) or Manifests.

You will be connected to the EST server the first time you launch the application each day; the server will then automatically check for and apply any updates. If, for any reason, a connection cannot be established with the EST server, you will see an error message indicating your connection failed. When you click on the OK button, start up will continue.

All other aspects of connecting to the EST server remain unchanged. When you check for updates during the day under Check for Application, Data and Barcode Update, the Desktop will continue as before, checking for application and data updates during the Transmit process. Note that if the connection at start-up was successful, there should not be any additional updates available.

## Navigating Around *Electronic Shipping Tools* Desktop Application

To select from the Main Menu or to activate a command button:

- Use the mouse to point and click on the desired option.
- Use hot keys as defined by an underlined letter or indicated between <>.

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.

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 entry of data.

Click on the down arrow to display a selection/drop-down list. All drop-down lists have the same functionality. That is, if the user types a character, then the drop-down list automatically scrolls to the first item in the list that begins with this character. If the user types a second character, then the list automatically scrolls to the first item that begins with *both* characters entered. For example:

User Types...	List Scrolls To...
1. A	Afghanistan
2. N	Andorra
3. G	Angola
4. U	Anguilla

However, once the first character is typed, the user cannot make the application scroll to an item in the drop-down list that *begins* with a *different* character by typing in that other character. For example, if the user types a "T", the drop-down list automatically scrolls to the first item that begins with "T". From this point on, the application considers only those items that begin with "T". If the user types a "H", then the list automatically scrolls to the first item that begins with "TH", *not* the first item that begins with "H".

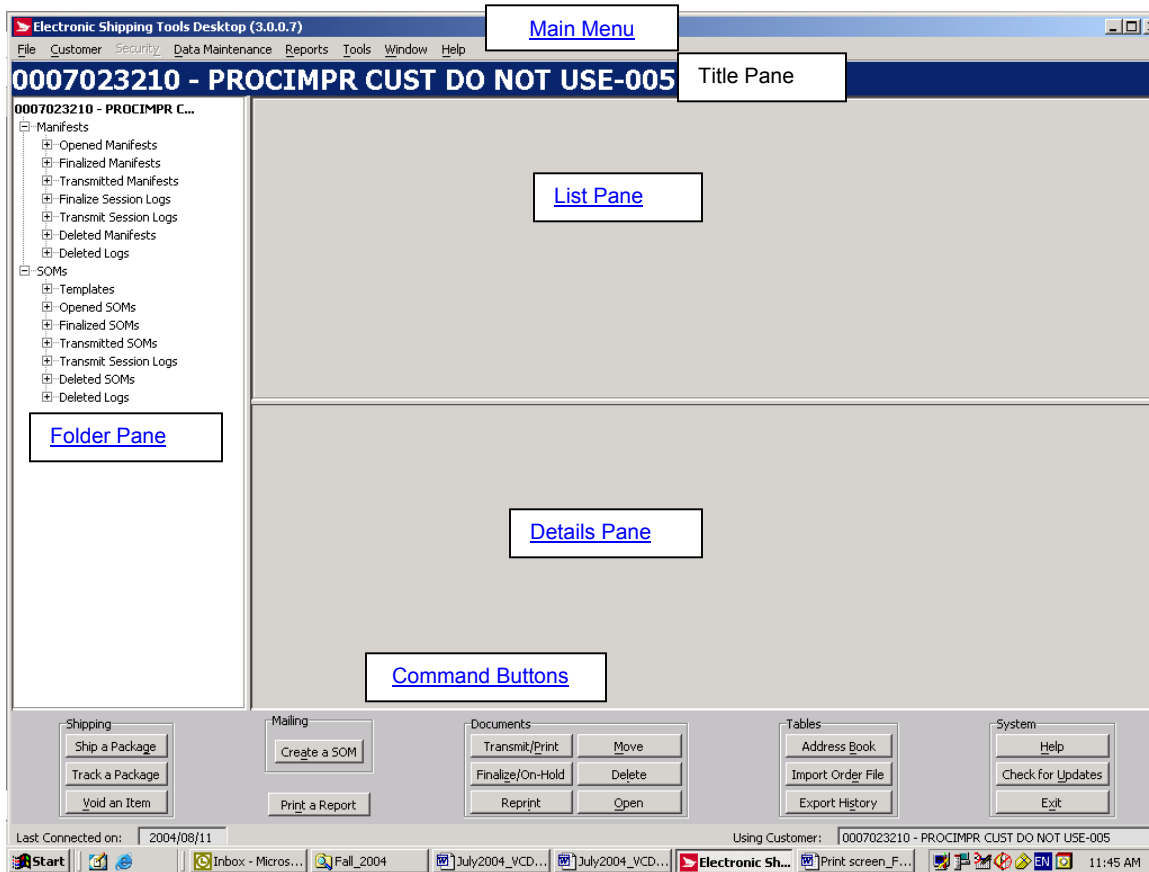
The **Help** section of the application will provide a description of fields and command buttons for each window.

**Sorting:** For all lists with data displayed in columns, you can click on the desired column heading to have the data automatically sorted by that field.

## 2.0 Electronic Shipping Tools Desktop Window

The application **Desktop** window for the electronic Statement of Mailing (SOM) acts as the control centre for all your processing of Order transactions. From this window, you can manage and navigate through the application structure, select Orders to transmit to CPC, print/reprint Order documents, delete Orders and initiate the data capture of new Orders or complete data capture for partially entered Orders.

The desktop also provides a visual representation of how the Orders, Order templates and the Transmit Session Logs are organized. The window is of a multiple windowpane design. You will find in this section a definition and a description of the fields in each of the panes, and a definition of each of the command buttons.



### 2.1 Main Menu

The **Main Menu** of the desktop window consists of the following menus, which will be described in greater detail in subsequent chapters:

- ❖ **File Menu**– This menu allows you to either create a new Manifest, or close the Shipping Window (for further details, please see chapter 3)
- ❖ **Customer Menu**– This menu displays the Mailed On Behalf Of customer names, along with their numbers, that are configured on your *Electronic Shipping Tools* desktop application (for more details, please see chapter 4)
- ❖ **Security Menu** - Use this menu to add and delete Electronic Shipping Tools users, and determine the Electronic Shipping Tools functions they are allowed to access (for further details, please see chapter 5)

- ❖ [Data Maintenance Menu](#) - Use the Data Maintenance menu to manage your customer data and site information. You can also configure many aspects of *Electronic Shipping Tools* from this menu, along with assigning aliases (i.e. meaningful names) to contracts and cost centers (for further details, please see chapter 6)
- ❖ [Reports Menu](#) - Use this menu to access the Reports and Delivery Confirmation functions (for further details, please see chapter 7)
- ❖ [Tools Menu](#) - Use this menu to perform system functions and configure peripheral equipment used with Electronic Shipping Tools as follows (for further details, please see chapter 8)
- ❖ [Window Menu](#) - Use this menu to select from the open windows on the Electronic Shipping Tools application
- ❖ [Help Menu](#) - Provides you with the tools required for completion of orders (for further details, please see chapter 10)

## 2.2 Folder Pane

### Opened Manifests

Once a manifest is created (either manually via **File > New Manifest** or automatically via the processing of a transaction), it has the status of Open. The application assigns to it an **EST ID**. EST ID's are generated in numerical sequence, starting at 1, and are unique per application desktop. A line item representing the manifest is created in this folder. An Open manifest continues to accumulate transactions.

Click on an Open manifest to display the details of all of its shipments to date in the bottom frame. This enables the **Open**, **Finalize**, **Transmit/Print**, **Move**, and **Delete** buttons.

Double-click on an Open manifest to have its information displayed in the **Manifest** window with the **EST ID** indicated in the top bar.

**ATTENTION!** Manifests are created per **Mailed On Behalf Of** customer number (i.e. you can have the same manifest type open for different customer numbers) and **Method of Payment** for each customer number (i.e. for one customer number, you can have the same manifest type open for different methods of payment).

### Finalized Manifests

When you finalize a manifest (by clicking the **Finalize** button on either the **Application Desktop** window or **Search/Manage Orders** window), no more transactions are posted to it.

If you decide that you want to post more transactions to the manifest or void an existing transaction on it, you can change its status back to Open by moving it to the **Opened Manifests** folder.

Click on a Finalized manifest to display the details of all of its shipments in the bottom frame. This enables the **Open**, **Transmit/Print**, **Move**, and **Delete** buttons at the bottom of the page.

Double-click on a Finalized manifest to have its information displayed in the **Manifest** window with the **EST ID** indicated in the top bar.

### Transmitted Manifests

When you transmit a manifest (by clicking the **Transmit/Print** button on either the **Application Desktop** window or **Search/Manage Orders** window), the manifest information is sent to the CPC server. Afterwards, no changes can be made to the manifest, such as voiding transactions on it.

Click on a Transmitted manifest to display the details of all of its shipments in the bottom frame. This enables the **Open**, **Reprint**, **Move**, and **Delete** buttons at the bottom of the page.

Double-click on a Transmitted manifest to have its information displayed in the **Manifest** window with the **Local ID** indicated in the top bar.

### Finalize Session Logs

When you finalize a manifest, some validations are performed (e.g. validation of credit card information). If an error occurs, a session log documenting the error is created in this folder. If the validations are successful, NO log is created.

Click on a Finalize session log to display its details in the bottom frame. This enables the **Open**, **Move**, and **Delete** buttons at the bottom of the page.

Double-click on a Finalize session log to have the same information displayed in the **Reports** window so that it can be printed.

## Transmit Session Logs

When you transmit a manifest, validations are performed and a connection to the CPC server is initiated. If an error occurs as part of the finalizing process, a session log documenting the error is created in the **Finalize Session Logs** folder. If an error occurs AFTER this process or the validations are successful, a session log, indicating success or error, is created in the **Transmit Session Logs** folder.

Click on a Transmit session log to display its details in the bottom frame. This enables the **Open**, **Move**, and **Delete** buttons at the bottom of the page.

Double-click on a Transmit session log to have the same information displayed in the **Reports** window so that it can be printed.

## Deleted Manifests

You can delete a manifest of any status. Click on a Deleted manifest to display its details in the bottom frame. This enables the **Move** and **Delete** buttons at the bottom of the page. Double-click on it to have its information displayed in the **Manifest** window with the **Local ID** indicated in the top bar.

**ATTENTION!** Whether Canada Post picks up your items or your deposit them at a postal installation, including Revenue Verification Unit (RVU), a manifest must accompany the shipment to avoid the risk of refusal. **A printed copy of the manifest preview is unacceptable.**

## Deleted Logs

You can delete a log of any type. Click on a Deleted Log to display its details in the bottom frame. This enables the **Move** and **Delete** buttons. Double-click on it to have the same information displayed in the **Reports** window so that it can be printed.

## 2.3 List Pane

Application Desktop Window – Top Frame: List of Manifests	
FIELD NAME	FIELD CHARACTERISTICS
Manifest Number	This field display a generated number assigned to the manifest.
Manifest Type	This field identifies the Manifest selections based on the Contract selected.
Mailed On Behalf Of Customer	This 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	This field identifies the contract number used for the mailing. The contract has an influence on the rates applied to the mailing.
Paid-by Customer Number	This field identifies the CPC assigned customer number of the customer who is paying for the mailing
Method of Payment	This field indicates the customer's chosen method of payment for the mailing.
EST ID	This field display a generated number assigned to the manifest.
Date/Time	This field displays the date and time the manifest was created.
Mailing Date	This field displays the date when the mailing is to be inducted at Canada Post. The date of mailing has an influence on the calculation rules.
Prepaid Count	This field displays the number of shipment items that have been prepaid.
Status	This field displays the status (e.g., transmitted) of the order.
Attempted Communication Date	This field displays a date when a communication with CPC server was attempted.
GST Amount	This field displays the amount of GST (Goods and Services Tax) associated with the Manifest in question.
PST Amount	This field displays the amount of PST (Provincial Sales Tax) associated with the Manifest in question
HST Amount	This field displays the amount of HST (Harmonized Sales Tax) associated with the Manifest in question
Customer Reference	This field displays the reference number as assigned by the customer.
Manifest Name	This field indicates the user-entered name for the manifest.
Destination Postal Code	This field displays the destination postal code for Air Stage Freight. This field is disabled for other products.
Outlet Name	This field displays the induction point of the Manifest.

## 2.4 Details Pane

Application Desktop Window – Bottom Frame: List of Transactions per Manifest	
FIELD NAME	FIELD CHARACTERISTICS
Item Number	This field displays the number associated with this item on the manifest.
Voided	This field indicates if the order is valid or void.
Order ID	This field displays a unique number that identifies the shipment
First Name	This field displays the first name of the customer associated with this item.
Last Name	This field displays the last name of the customer associated with this item.
Company Name	This field displays the company name of the customer associated with this item.
Item Weight	This field displays the weight of the item.
Cubed Weight	This field displays the cubed weight of the item.
Length	This field displays the length of the item.
Width	This field displays the width of the item.
Height	This field displays the height of the item.
Service Type	This field displays the Distribution service in question.
Signature Indicator	This field displays whether or not the Signature option was selected for the item.
Delivery Confirmation	This field displays whether or not the Delivery Confirmation option was selected for the item.
Coverage Indicator	This field displays whether or not the Insurance option was selected for the item.
Insured Value	This field identifies the amount for which the item is being insured.
COD Indicator	This field displays whether or not the COD option was selected for the item.
COD Value	This field identifies the amount of the COD.
COD Method of Collection	This field displays the method of collecting the COD amount. Cash Cash or Cheque Post-dated Cheque
COD Collection Amount	This field identifies the amount collected upon delivery.
Oversize Indicator	This field displays whether or not the Oversize option was selected for the item.
Proof of Age Required (18)	This field displays whether or not the Proof of Age Required (18) option was selected for the item.
Proof of Age Required (19)	This field displays whether or not the Proof of Age Required (19) option was selected for the item.
Card for Pick Up	This field displays whether or not the Card for Pick Up option was selected for the item.
Not Safe for Drop	This field displays whether or not the Not Safe for Drop option was selected for the item.
Special Delivery Indicator	This field displays whether or not the Special Delivery option was selected for the item.
Registered Indicator	This field displays whether or not the Registered option was selected for the item.
Acknowledgement of Receipt Indicator	This field displays whether or not the Acknowledgement of Receipt option was selected for the item.
Evening Delivery (6 p.m. – 9 p.m.)	This field displays whether or not the Evening Delivery option was selected for the item.
Saturday Delivery (9 a.m. – 1 p.m.)	This field displays whether or not the Saturday Delivery option was selected for the item.
Pick Up @ Post Office	This field displays whether or not the Pick Up @ Post Office option was selected for the item.
Deliver to Door	This field displays whether or not the Deliver to Door option was selected for the item.
Deliver to Parcel Box	This field displays whether or not the Deliver to Parcel Box option was selected for the item.
Item Pretax Amount	This field identifies the pretax amount associated with the item.
Item GST Amount	This field identifies the GST amount associated with the item.
Item HST Amount	This field identifies the HST amount associated with the item.
Item PST Amount	This field identifies the PST amount associated with the item.



Province/State	This field identifies the destination province.
Country	This field identifies the destination country.
Postal/Zip Code	This field identifies the destination postal /zip code.
Item Ref #2	This field is for customer reference only and is optional.
Return Label	This field displays whether or not there is a Return Label on the item.
Return Item Number	If the Return Label field is checked for the item, this field will identify the Return Item Number associated with it.

## 2.5 Command Buttons

**ATTENTION!** These command buttons apply **ONLY** on the manifest line items, **NOT** on the individual transaction line items of each Manifest. For example, you **CANNOT** move a transaction line item from one manifest to another or delete a transaction from a Manifest.

All the command buttons you need to do a mailing are in one place, grouped in five different categories on this Desktop page. Some commands, designated here with a \* can also be found from the toolbar.

### **Shipping:**

#### **Ship a Package**

(Shipping and Delivery Services) This button allows you to prepare and ship a package\*

#### **Track a Package**

(Shipping and Delivery Services) This button allows you to track a package\*

#### **Void an Item**

This button allows you to void an item (shipment)

### **Mailing:**

#### **Create a SOM**

(Communication Services) This button opens a pop-up menu, which will determine the type of SOM you will create based on the type of service you select.

#### **Print a Report**

This button allows you to generate [reports](#) that will help you reconcile your shipping business.

### **Documents:**

#### **Transmit/Print**

To transmit either an Open or Finalized manifest, click on its line item to select it and click this button. A connection to the CPC server is initiated and validations are performed. If an error occurs, a session log documenting the error is created either in the **Finalize Session Logs** folder or **Transmit Session Logs** folder. If there are no errors, the manifest information is sent. The application also prints the manifest.

**You must supply a printed Manifest to the Canada Post agent with your shipment. Otherwise, your shipments run the risk of being refused.**

Note: If the transmission fails, the application prints a manifest with a "Non-Transmitted" watermark on each page. Attach this printed copy to your shipment and retransmit the manifest later.

**ATTENTION!** Regarding manifests that fail on Transmit, Canada Post currently allows a grace period of 12 days during which they can remain un-transmitted. This grace period is under the control of Canada Post. Once this grace period is over, you are

locked out of the application and thus forced to connect to the CPC server to transmit these manifests. This happens after you click on the Desktop icon. The **Communication Status Notification** window appears, on which you need to click **Connect**.

**Finalize/On Hold**

To finalize an Open manifest, click on its line item to select it and click this button. The application automatically moves the line item from the **Opened Manifests** folder to the **Finalized Manifests** folder. Some validations are performed, such as the validation of credit card information. If an error occurs, a session log documenting the error is created in the **Finalize Session Logs** folder.

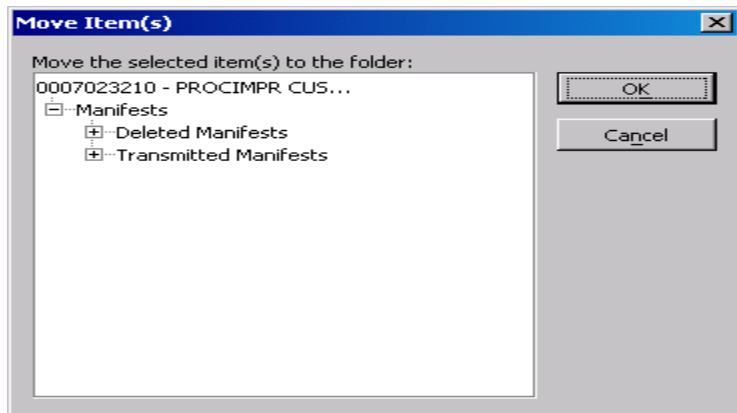
**Reprint**

You can only reprint Transmitted manifests. To do so, click on its line item to select it and click this button. The printed copy has a "Reprint" watermark on each page.

**Move**

You can change the status of a manifest by moving it to a different folder. However, from a particular folder, the application dictates to which other folders a manifest can be moved. You can also move a Finalize or Transmit session log between its folder and the **Deleted Logs** folder.

To move a line item, click on it to select it and click this button. The **Move Items** pop-up window (see below) appears. The permissible destination folders, along with the source folder, are displayed. Click on the desired folder (it becomes bolded) and click **OK**. To end the action, click **Cancel**.



You can also perform the Move functionality by clicking on a line item to highlight it and selecting **Move** from the **File** menu.

Refer to the following table for permissible destination folders.

FROM FOLDER	TO FOLDER
1. Opened Manifests	Deleted Manifests
2. Finalized Manifests	Deleted Manifests, Opened Manifests
3. Transmitted Manifests	Deleted Manifests
4. Finalize Session Logs	Deleted Logs
5. Transmit Session Logs	Deleted Logs
6. Deleted Manifests	Opened Manifests (previously Open AND Finalized manifests), Transmitted Manifests (previously Transmitted manifests)
7. Deleted Logs	Finalize Session Logs (previously Finalize logs), Transmit Session Logs (previously Transmit logs)

**Delete**

To delete a manifest or a log, click on its line item to select it and click this button. If you do this in any folder except for the **Deleted Manifests** and **Deleted Logs** folders, NO confirmation message appears. The application automatically moves the line item from the folder to the appropriate Deleted folder. If you do this in the two aforementioned folders, a confirmation message appears. Click **OK** to permanently delete the line item from the application. Click on **Cancel** to keep the line item in the Deleted folder.

You can also "delete" a line item via the **Move** button to move it to the appropriate Deleted folder or by selecting **Delete** from the **File** menu.

## Open

To open a manifest of any status or a log of any type to see and print its information, click on its line item to select it and click this button. For a manifest, the **Manifest** window appears with the **Local ID** indicated in the top bar. For a log, the **Reports** window appears.

You can also open a manifest or log by double-clicking on its line item or clicking on it to highlight it and selecting **Open** from the **File** menu.

## Tables:

### Address Book

(Shipping and Delivery Services) This button allows you to create an address book, add/delete recipients to and from the address book, and edit address book entries \*

### Import Order File

(Shipping and Delivery Services) This button allows you to import order entry information produced outside the Electronic Shipping Tools into the application database \*

### Export History

This button allows you to export order history

## System:

### Help

This button opens a pop-up window containing the tools you need to complete an order. Click [here](#) for more details

### Check for Updates

This button allows you to query if any updates are available\*

### Exit

Clicking this button closes all application windows and exits the desktop application. If you were creating or editing a manifest in the **Manifest** window, a message appears asking if you want to save your changes. However, if certain windows are open, such as the Client window, this functionality does not work and the application emits a beep to inform you to close these windows first.

You can also exit the application by selecting **Exit** from the **File** menu \*

**ATTENTION!** If you have entered data for a transaction on the **Shipping** window, clicking **Exit** will NOT prompt you to save your data or automatically save it for when the application is next launched

## 2.6 Popup Menus

Popup menus appear within the applicable windowpane when you right click the mouse on items located in the **Folder** and **List Panes**.

POPUP MENU ITEM	RESULT OF INVOCATION
<b>Folder Pane Popup Menu</b>	
Create Folder	<ul style="list-style-type: none"> <li>A folder has been selected from the Folder Pane.</li> <li>Opens the Create Folder dialogue window.</li> </ul>
Rename	<ul style="list-style-type: none"> <li>A user-created folder has been selected from the Folder Pane.</li> <li>Highlights the name of the selected folder, and allows you to change its name.</li> </ul>
Expand	<ul style="list-style-type: none"> <li>Expands the folder structure.</li> </ul>
Collapse	<ul style="list-style-type: none"> <li>Collapses the folder structure.</li> </ul>
<b>List Pane Popup Menu</b>	
Open	<ul style="list-style-type: none"> <li>If a Manifest has been selected: Opens the Manifest window for the selected Manifest.</li> <li>If a Transmit Session Log record has been selected: Displays the Transmit Session Log record in the Report Preview window.</li> </ul>
Delete	<ul style="list-style-type: none"> <li>Deletes the selected entries. When the current folder is any folder other than the Deleted SOMs or Deleted Logs folder, this action moves the selected items to the Deleted SOMs/Logs folder. No confirmation is requested.</li> <li>If the current folder is the Deleted Manifests or Deleted Logs folder, this action physically deletes the selected item(s) from the application database. You are requested to provide confirmation.</li> </ul>
Move	<ul style="list-style-type: none"> <li>Displays the Move Item(s) window to allow you to select the destination folder to which the selected items are to be moved. Click <a href="#">here</a> to find more details in chapter 2.5 – Command Buttons.</li> </ul>

## 2.7 Managing Communication with CPC Server

During the following processes, the application manages communication and the data synchronization between your system and the CPC server:

- Checks for reference data, barcode range and software application updates (from the Tools menu select Check for Application, Data and Barcode Update);
- Transmit/Print orders to the CPC server.

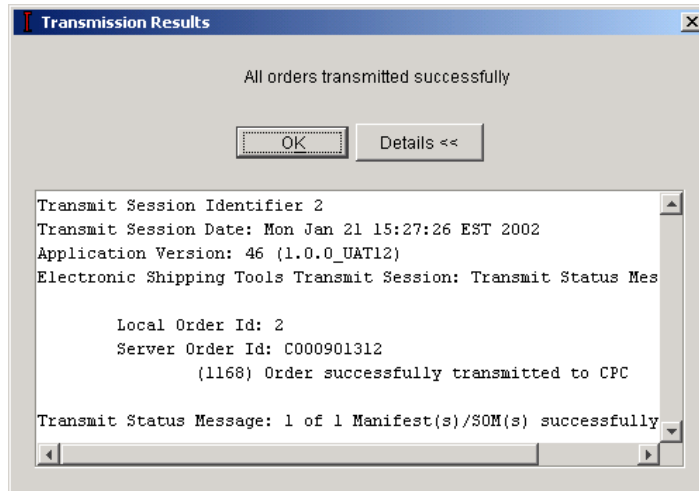
During either of these two processes, the application established communication with the CPC server to ensure you have the most current rates and the latest version of the application.

Associated with the tasks above, the following steps are performed:

- You will see the status bar with the progress of each updated process;
- A connection established with the CPC server, if a connection does not already exist;
- Prompts for you to logon to the CPC server;
- Initiates updates, verification and availability of reference data, barcode replacement and software application updates;
- A Transmit Session Log is maintained for communications with the server;
- Prints the orders that have been successfully transmitted.

### Transmit Session Log

A Transmit Session Log is maintained for messages returned from the Transmit/Print server process. The following window is displayed when a single order transmit has failed or all orders during a multiple order transmit return with errors.



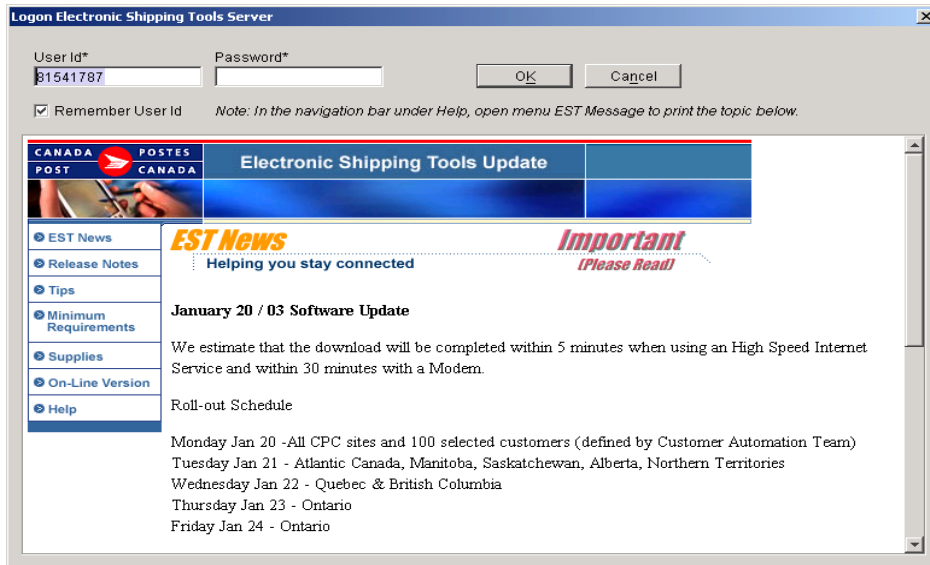
<b>Transmission Session Log</b>	
<b>COMPONENT</b>	<b>DESCRIPTION</b>
Transmit Session Identifier	The file name of the log file.
Transmit Session Date	The date and time of the transmit session.
Application Version	The current version of the application.
Electronic Shipping Tools Transmit Session	A message returned by the CPC server. This message space is used: <ul style="list-style-type: none"> <li>To document that a successful transmit session has been achieved, or</li> <li>To document that transmit session could not be established and the reason for the session failure. This message will also include instructions the user is to follow to correct the problem.</li> </ul>
Manifest/SOM Local Identifier	The local system identifier of the SOM being transmitted.
Server Manifest / SOM Id	The SOM Id assigned by the CPC server. This will be blank if an error condition exists with the current SOM being transmitted.
Acknowledgement Message	A message returned by the CPC server. The message space is used: <ul style="list-style-type: none"> <li>To document the successful transmit of the local SOM or</li> <li>To document that the local SOM has not been successfully transmitted and the reason(s) why. If the server detects an error with the SOM being transmitted, the server will return one or more error messages describing the errors it has identified.</li> </ul>
Transmit Status Message	This message identifies the number of SOMs successfully transmitted during this session.

## 2.8 Logon to the CPC Electronic Shipping Tools Server

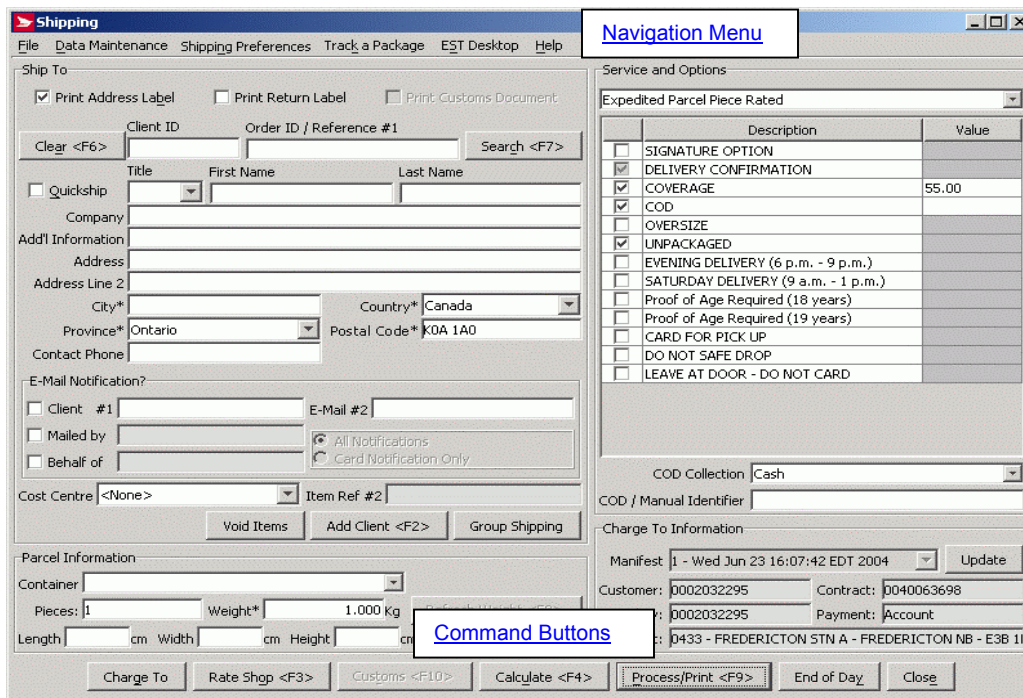
This Window allows you to logon on the Electronic Shipping Tools CPC server to:

- Transmit orders to the CPC Server;
- Initiate an application and reference data update; or
- Obtain delivery confirmation status on one or more manifest items (Shipping and Delivery Services only).

It is triggered the first time you initiate one of the server processes above during the current session. The User Id and Password is remembered for the remainder of the current session after the first successful connection to the CPC server and reuses the logon information for the subsequent connection to the server.



### 3.0 File Menu (Shipping Window)



Access this window by either selecting **New Shipment** from the **File** menu, or clicking on the **Ship a Package** command button.

#### Default Setting

For a particular **Mailed On Behalf Of** customer number, you can set the **Shipping** window to automatically open on startup. Select **Site Information** from the **Data Maintenance** menu. Choose the **Default Settings** tab, then the **Shipping** tab. Select the **Open Shipping Window on Startup** checkbox.

Use this **Shipping** window to enter all shipping transactions in *Electronic Shipping Tools*. See details for the four sections of this window ([Ship To](#), [Parcel Information](#), [Service and Options](#), and [Charge To Information](#)) in the subsequent chapters below.

To avoid duplicate data entry, “reusable data” is kept from item to item while item-specific data, such as the client and weight, is cleared once an item is processed. If some reusable data does not apply to the current shipment, change it and the new value(s) will start applying to all shipments from that point on.

## Shipping Steps

The following table presents the steps of the shipping process. Details regarding the Shipping window, Credit Card Data Entry, and Customs – as well as the Rate Shop window, are provided in the following sections. The layout of the shipping window allows you to review all information entered to ship a parcel from one page.

DESKTOP SHIPPING PROCESS FLOW	
SHIPPING TASK	TASK COMPONENTS & CHARACTERISTICS
1. Open Blank Shipping Window	Either select New Shipment from the File menu, or click on the Ship a Package command button. Shipping window opens.
2. Assess Payment Information	If necessary, select the Charge To command button to assess payment information (e.g. Mailed On Behalf Of customer number, Method of Payment). Make desired changes.
3. Enter/Retrieve Client Information	<p>In the Ship To section:</p> <ol style="list-style-type: none"> <li>Enter manually client information.</li> <li>Retrieve client information via search on Client ID, Order ID / Reference #1, Last Name, or Company.</li> <li>Retrieve client information using a <a href="#">Group Shipping List of Clients</a> or a <a href="#">Group Shipping List of Imported Orders</a>.</li> </ol> <p>OR</p> <p>OR</p> <p>Note: If an imported order item contains a Client ID that exists in an address book and all mandatory client address data BUT this data is different from that in the address book, the data from the imported order item overrides the data in the address book when you search on Order ID / Reference #1.</p> <p>However, if the imported order item is missing even one mandatory address data value (e.g. the city), the address book data is fetched.</p> <p>Choose to print the address label, provide only enough information for <a href="#">Quickship</a>, and/or print the customs document by selecting the appropriate checkbox.</p> <ul style="list-style-type: none"> <li>To print the Quickship label, BOTH the Print Address Label and Quickship checkboxes must be selected.</li> <li>For the Customs button to become enabled, BOTH the Country on the Ship tab and Service Type on the Service tab must be selected.</li> </ul> <p>ATTENTION! If you select the Print Address Label checkbox on the Ship To section, and then <i>change</i> the Service Type (this includes populating a blank Service Type field) on the Service and Options section, the Print Address Label checkbox will be refreshed.</p> <p>If desired, select a Cost Centre.</p>
4. Enter/Retrieve Parcel Information	Enter shipment information in the <a href="#">Parcel Information</a> section. You can manually enter this information or select a predefined container from the <a href="#">Container</a> drop-down list. Weight is the only mandatory field.
5. Enter <a href="#">Service and Options</a>	<p>Select a Service Type and add options related to this service.</p> <p><i>Note: If a Manifest already exists for the Service Type chosen, its name (i.e. date and time of creation) populates the Manifest field (display-only). If more than one Manifest exist for that Service Type, they are displayed in the Manifest drop-down list. Choose the appropriate one.</i></p>
6. Rate Shop	<p>Select the Rate Shop button to initiate rating for the item by the local pricing engine.</p> <p>This populates the Service Std, Weight, and different cost fields in the Calculate preview window.</p>
7. Enter <a href="#">Customs</a> Information (USA and International only)	The Customs button becomes enabled when the Print Customs Document checkbox and Country, outside of Canada, in the Ship To section and Service Type on the Service and Options section have been selected.

	<p>The data entry fields on the Customs window will incorporate the mandatory information on the correct customs document.</p> <p><i>Note: Customs information is mandatory for Purolator Intl PuroLetter, Purolator Intl PuroPak, Purolator International, and Commercial* Expedited Parcel – USA. You will need to supply this information EVEN if the Print Customs Document checkbox is not selected.</i></p>
8. Calculate	This button allows you to review parcel, cost and barcode information.
9. Process/Print Transaction	Click the Process/Print button. This posts the transaction to the appropriate manifest. If the options have been selected, the address label(s) and proper customs document are printed.
10. End of Day	<p>Click the End of day button when you finalize a manifest, no more transactions are posted to it.</p> <p>If a validation performed at this stage fails, a session log documenting the error is created in the Finalize Session Logs folder on the Application Desktop window.</p> <ul style="list-style-type: none"> <li>• On the Search/Manage Orders window, you MUST finalize the manifest first before being allowed to transmit it to CPC.</li> <li>• The benefit of finalizing a manifest first is that you can change its status back to Open so that you can void a transaction.</li> </ul> <p>This initiates a connection with and sends your manifest information to the CPC server. It also creates a session log, indicating success or error, in the Transmit Session Logs folder on the Application Desktop window.</p> <p>If a validation performed at the Finalize stage fails, you can find the session log documenting the error in the Finalize Session Logs folder on the Application Desktop window. If a validation fails after this stage, the error is documented in the session log in the Transmit Session Logs folder.</p>

**Note: All items, except prepaid products, must be accompanied by a *Manifest*, unless the customer uses a *Bill of Lading* or, the *On-line* version of the Electronic Shipping Tools.**

## Shipping Window Components

### 3.1 Navigation Menu



The **Navigation Bar** of the shipping page consists of the following menus:

- ❖ **File** – This menu allows you to either create a new Manifest, or close the Shipping Window
- ❖ **Data Maintenance** - Use the Data Maintenance menu to manage your customer data and site information. You can also configure many aspects of *Electronic Shipping Tools* from this menu, along with assigning aliases (i.e. meaningful names) to contracts and cost centers
- ❖ **Shipping Preferences** – Contains data from the Default Settings tab of the Site Information page
- ❖ **Track a Package** - (Shipping and Delivery Services) This menu allows you to search for an item by Item number or Delivery Notification Card number
- ❖ **EST Desktop** – Redirects you to the Desktop main page
- ❖ **Help** – Provides you with the tools required for completion of orders

### 3.2 Command Buttons

**Charge To**

This button displays the [Charge To Information](#) pop-up page (below). Information entered here will automatically appear on the shipping page under the Charge To Information section.



**Charge To Information**

Manifest

Mailed by: 0007023210  
Mailed On Behalf Of\*: 0007023210

Contract\*: 0040662505  
Paid By Customer\*: 0007023210

Method of Payment\*:  
Selected Credit Card Account:

Outlet: 0077 - OTTAWA MPP

Apply Cancel

**Rate Shop <F3>**

This button is enabled only if the destination **Country** is Canada. Click this button to access the **Rate Shopper** window (seen below), where you can compare the costs of sending your shipment using different Canada Post Shipping and Delivery Services domestic products.

	Regular Parcel	Expedited Parcel	Xpresspost	Priority Courier
Service Standard	2 day(s)	1 day(s)	1 day(s)	Next day a.m.
Base Cost	4.21	4.21	4.74	12.73
<input checked="" type="checkbox"/> Delivery Confirmation	0.00	Included	Included	Included
<input type="checkbox"/> Signature				
<input type="checkbox"/> COD				
Additional Coverage				
<input type="checkbox"/> Unpackaged				
<input type="checkbox"/> Oversize				
GST	0.30	0.30	0.34	0.91
PST	0	0	0	0
<b>Total (including Surcharges)</b>	<b>4.60</b>	<b>4.60</b>	<b>5.19</b>	<b>13.93</b>

Calculate Apply Cancel

You can change the selection of options to see the impact on pricing. Select the checkbox beside an option to include the cost for it in the **Total** reflected at the bottom of each product column. For the **Additional Coverage** option, indicate the amount of insurance coverage required. Once you have selected all required options, click **Apply** to recalculate the costs. The applicable taxes (**PST**, **GST**, or **HST**) and **Total** cost are shown for each product.

Click the Calculate button to initiate the recalculation of the option costs, taxes, and total price for each service so that you can see the impact of changing the option selections.

Click the Apply button to populate the **Service and Options** section with the information from the selected **Service Type** in the **Rate Shopper** window. To select a **Service Type**, click anywhere in its column BELOW the column heading (the column turns purple). This button also closes the window.

Click the Cancel button to close the **Rate Shopper** window.

**Customs <F10>**

BOTH the **Country** on the **Ship To** section and **Service Type** on the **Service and Options** section must be selected to enable the **Customs** button. Since customs information is *mandatory* for Purolator Intl PuroLetter, Purolator Intl PuroPak, Purolator International, and Commercial\* Expedited Parcel - USA, this is all that is required to access the **Customs** window.

Click [here](#) for further information on the Customs process.

## Calculate <F4>

This button becomes enabled when all mandatory fields have been entered. Click this button to send the shipment for rating by the local pricing engine. A Calculate Preview pop-up page will be displayed, including Parcel, Cost, Service Std, and Barcode information. Certain validations (e.g. Postal Code) are performed. These fields are read-mode only.

Parcel Information		Cost Information	
Client ID		Base	9.96
Order Id		Options / Surcharges	0.22
Outlet	TORONTO BMF	Automation Discount	0.20
Destination PC	V6B 4A2	GST	0.70
Service	Regular Parcel Piece Rated	PST	0.00
Weight	2.000 kg	Total	10.68
Length	30.0 cm	Service Std	7 day(s)
Width	30.0 cm	Barcode	
Height	30.0 cm		
Cubed Weight	4.500 kg		

**ATTENTION!** If you change the **Service Type** in the **Service and Options** section, you need to click **Calculate** again to update the different cost fields.

## Process/Print

Click the **Process/Print** button once you have completed all mandatory fields on the **Shipping** window, and are ready to post the transaction to the appropriate manifest. *Electronic Shipping Tools* checks if all mandatory fields are completed, and warns you if they are not. Other validations are performed, such as checking for acceptable parcel measurements. If the options have been selected, the address label(s) and proper customs document is printed.

If a manifest does not already exist for the **Service Type** selected, the application will automatically create one. The **Manifest** field in the **Charge To Information** section becomes populated with the manifest name (i.e. date and time of creation), along with its **Local ID**.

You remain in the **Shipping** window so that you can enter the next transaction.

## End of Day

Clicking on this button displays the **End of Day** pop-up page, enabling you to transmit the last successfully processed transaction if the related manifest is still open. This page allows you to transmit the manifest without navigating back to the Desktop main page.

Manifest Number	Local Id	Manifest Type	Mailed on Behalf of Cu...	Method of Payment
9		International Cou...	0007023210	Account
7		Commercial Exp...	0007023210	Account
9		Regular/Expedite...	0007023210	Account

## Close

Click this button to close the **Shipping** window.

**ATTENTION!** If there is currently data on the window for a shipment that has not been processed yet, clicking Close does NOT prompt you to save the data/process the transaction or automatically save the data for when the application is next launched.

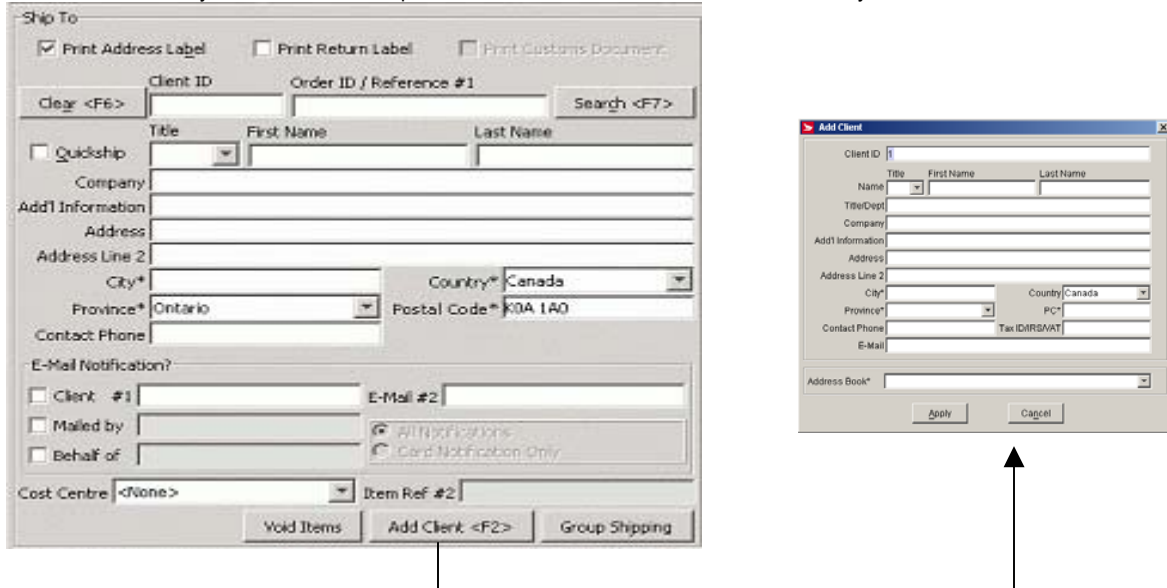
### 3.3 Ship To Section

The **Ship To** section of the shipping page contains information related to the recipient and the functions like: Import Order ID, Print Return Label, Print Customs Document, Print Address Label, Void Items, E-Mail Notification, Add Client, and Group Shipping.

It also contains checkboxes for the following functions: Quickship, Print Return Label, Print Customs Document and Print Address Label.

You may use two reference fields to record additional information pertaining the shipment.

The E-Mail field lets you choose several options for e-mail notification: Client #1, mailed By, Behalf of, and/or E-Mail #2



**ATTENTION!** Even though the **Address** field is not marked with an asterisk to indicate that it is mandatory, it is a required value. Validation occurs when you click the **Process/Print** button.

<b>Ship To Section</b>	
<b>FIELD NAME (* = mandatory)</b>	<b>FIELD CHARACTERISTICS</b>
Print Address Label	Select this checkbox if you want to print the address label(s) for the current shipment (if any are produced). If you select the Print Address Label checkbox in the Ship To section and then change the Service Type (this includes populating a blank Service Type field) in the Service section, the Print Address Label checkbox will be deselected.
Print Return Label	Indicates whether the customer wants to print a Return Label for selected package.
Print Customs Document	This checkbox is enabled <b>ONLY</b> for a US or International destination.
Client ID	A user-determined number that identifies the client (i.e. recipient of the shipment). This number can be any combination of digits and/or letters. You can retrieve client address data via a search on this field.  Note: The application does not prevent duplicate Client ID's from being supplied.
Order ID / Reference #1	A user-determined number that identifies the shipment. You can retrieve client address data (be aware that it may be incomplete) via a search on this field.  Note: The application does not prevent duplicate Order ID / Reference #1 's from being supplied.
<a href="#">Quickship</a>	Select this checkbox if you want to provide only enough client address information for a Quickship shipment (because your address labels have been produced using other means). For further information, please refer to the Quickship Overview section at the end of this chapter.
Title	From the drop-down list, select an appropriate salutation for the recipient.

First Name	Enter the first name of the recipient.
Last Name	Enter the last name of the recipient. You can retrieve client address data via a search on this field.
Company	Enter the company of the recipient.
Add'l Information	Enter any additional Company information.
Address *	Enter the street address to which the shipment is destined.
Address Line 2	If more space is needed for the street address, use this field.
City	Mandatory for Canada and USA for a regular shipment only. Optional for International. Enter the city.
Country	Select the destination Country from the drop-down list. Canada and USA are listed at the top for easier access.
Province/State	Mandatory for Canada (for a regular shipment only) and USA (for both regular and Quickship shipments). Optional for International. If the Country is Canada, a list of valid Provinces and Territories in Canada is displayed, sorted alphabetically. If the Country is USA, a list of valid States in the United States is displayed, sorted alphabetically.
PC (Postal Code)/Zip	Mandatory for Canada and USA (for a regular shipment). Optional for International. Enter the postal code or zip code.
Contact Phone	Enter the telephone number of a contact at the recipient destination who can be called to follow up on shipment delivery.
Tax ID/IRS/VAT	This field appears for USA and International destinations only. If known, enter the recipient's U.S. Internal Revenue Service number or Social Security number or Value Added Tax number. Required for shipping items valued over US\$200.00.
<b>E-Mail Notification?</b>	
Client #1	Internet E-Mail Address of the client, for the purpose of sending an E-Mail Notification.
E-Mail #2	Second E-Mail Address of the client, for the purpose of sending the E-Mail Notification to another address.
Mailed By	This field indicates whether or not the Mailed By Customer will receive e-mail notifications.
No label (mailed by e-mail)	This field contains the e-mail address to be used for e-mail notifications. When the Mailed By checkbox is selected, this field is defaulted to the e-mail address on the associated Customer window. When the Mailed By checkbox is de-selected, this field will be cleared and disabled.
Behalf of	This field indicates whether or not the Mailed On Behalf Of Customer will receive e-mail notifications.
No label (mailed by e-mail)	This field contains the e-mail address to be used for e-mail notifications. When the Mailed On Behalf Of checkbox is selected, this field is defaulted to the e-mail address on the associated Customer window. When the Mailed On Behalf Of checkbox is de-selected, this field will be cleared and disabled.
All Notifications	Type of E-Mail Notification(s) the user wishes to receive from Event Manager. Indicates that the user wishes to receive all notifications (i.e. Induction, Delivery, etc.) This is the default. Radio button is only enabled if at least one of the E-Mail Notification checkboxes (i.e. Client, Mailed By and/or Behalf of) is selected.
Card Notification Only	Type of E-Mail Notification(s) the user wishes to receive from Event Manager. Indicates that the user wishes to receive an e-Mail notification only if the parcel could not be delivered and a Notice Card was issued to the recipient. Radio button is only enabled if at least one of the E-Mail Notification checkboxes (i.e. Client, Mailed By and/or Behalf of) is selected.
<a href="#">Cost Centre</a>	This field indicates the internal Cost Centre to which you want to assign the charges of the current item The drop-down list contains two special entries: < None >, which means no Cost Centre, is selected (Null would be stored in database). < Add a New Cost Centre >. When selected initiates P490U 1.2.10 Maintain Cost Centre, opening a window where a new Cost Centre can be added. Upon return to the Shipping window, the newly created Cost Centre will be displayed as the selected one. The list will be sorted alphabetically, except for < None >, which is first and < Add a New Cost Centre > which is second. Always enabled. Defaulted to < None > when the Shipping window is opened. Mandatory when user selects the Cost Centre Required setting on the Shipping Preferences window.
Item Ref #2	A second Reference Number that the user will be able to use to track the package. Disabled and blank in Quickship mode or if Delivery Confirmation is not selected. Disabled and populated with the value in the Cost Centre drop-down list when the 'Use Cost Centre as Reference #2' checkbox is selected on the Shipping Preferences window.

## Command Buttons

**Clear <F6>**

Click this button to clear all data fields in the **Ship To** section, along with any selected checkbox options

**Search <F7>**

Click this button to retrieve client address data via a search on the **Client ID**, **Order ID / Reference #1**, **Last Name**, or **Company** field. A search on the **Client ID** field needs an exact match to be successful (i.e. entering "1" will not retrieve entries starting with "1"). Since duplicate **Client ID's** are allowed in address books, if more than one client record matches the search criteria, the **Select Client** window appears for you to choose one. However, the **Order ID / Reference #1** field supports partial searches (e.g. entering "12" will bring up the **Select Order ID / Reference #1 Item** pop-up window with all records with **Order ID / Reference #1** values starting with "12" for you to choose one).

A search on the **Last Name** or **Company** field does not have to be case-sensitive but needs an exact match for success.

To get a list of ALL client records from ALL [Address Books](#) in the application, just click **Search**. The cursor can be anywhere on the tab; you can also have data in any field EXCEPT for the four search fields above.

Notes: If an **Order ID / Reference #1** Item is missing required data, you must supply this data before processing the transaction.

If you search using an **Order ID / Reference #1** value whose record contains a Client ID, the application searches all existing address books for this Client ID. If there is no match, all data in the **Order ID / Reference #1** Item record is retrieved as is.

However, if there is a match in an address book, one of the following two actions will happen:

1. If the **Order ID / Reference #1** Item record contains all mandatory client address data BUT this data is different from that in the address book, the data from the **Order ID / Reference #1** Item record overrides the data in the address book.
2. However, if the **Order ID / Reference #1** Item record is missing even one mandatory address data value (e.g. the city), the address book data is fetched.

**Void Items**

Click this button to void line items on a manifest

**Add Client <F2>**

After entering data in the **Ship To** section (at least the mandatory fields), click this button to add this data as a new client record in an existing address book. The **Client** window appears with fields populated with this data. Select the desired address book from the [Address Book](#) drop-down list and click **Save**.

**Group Shipping**

After entering the **Weight** on the **Parcel Information** section and selecting the **Service Type** within the **Service and Options** section, click this button to bring up the **Group Shipping** pop-up window so that you can select the appropriate **Group Shipping** List (either of Clients or Imported Orders) to process.

[Group Shipping List of Clients](#) or [Group Shipping List of Imported Orders](#)

To use a Group Shipping List, you must first supply the **Weight** and **Service Type** (**Service** tab) prior to clicking the **Group Shipping** button.

When you click the **Group Shipping** button, the Group Shipping pop-up window appears. The **Clients** drop-down list contains the names of all existing Group Shipping Lists of Clients. The **Order ID / Reference #1** drop-down list contains the names of all existing Imported Orders Group Shipping Lists. Choose either a list of clients or one of imported orders. When you choose one, the other field becomes disabled.

Afterwards, in the **Sort By** drop-down list, choose a field to serve as the sorting criterion (i.e. the order in which the distribution list entries will be processed). The first option is As Created.

For a Group Shipping List of Clients, there are 12 other sorting criteria: Client ID, First Name, Last Name, Title, Company, Address Line 1, Address Line 2, City, Province/State, Country, Postal/Zip Code, and Phone Number.

For an Imported Orders Group Shipping List, there are 21 other sorting criteria **Order ID / Reference #1**, Client ID, First Name, Last Name, Title, Company, Additional Address Info, Address Line 1, Address Line 2, City, Province/State, Postal/Zip Code, Country, Voice Phone Number, Weight, Article, Length, Width, Height, COD Amount, and Method of Collection.

Click **Process**. If there are errors, they are displayed in the **Group Shipping Processing Errors** pop-up window. You are asked if you want to create a group shipping list of the clients that were not successfully processed for later processing after correcting the errors. If you click **Yes**, you are prompted to enter a name for the list.

Examples of processing errors are missing customs information, invalid Service Type for selected destinations (Note: for an Imported Orders Group Shipping List, this error is worded as "Service Type is a mandatory field"), invalid Postal Code, and unacceptable parcel measurements.

**ATTENTION!** Records in the Group Shipping List that have no errors do get processed by the application.

## Quickship

The screenshot shows the 'Shipping' application window. In the 'Ship To' section, the 'Quickship' checkbox is checked and circled in red. Other visible fields include Client ID, Order ID / Reference #1, Title, First Name, Last Name, Company, Address, City, Province, Postal Code, Country, Contact Phone, Tax ID/IRSAVAT, E-Mail Notification options, Cost Centre, Item Ref #2, Parcel Information (Container, Pieces, Weight, Length, Width, Height), and Service and Options (Xpresspost Piece Rated, SIGNATURE OPTION, DELIVERY CONFIRMATION, etc.).

Access this widow by clicking the **Quickship** command button on the **Ship to** section of the **Shipping** window.

### Overview

If you don't need Electronic Shipping Tools to print address labels for you, you can choose the **Quickship** option. For accurate rating, all you need to enter to **Quickship** is the destination FSA (a full postal code is required for rural destinations).

You can also enter the **Order ID / Reference #1** and **Number of Pieces**.

To print a Quickship Address Label, check **Print Quick Ship Address Label** on the **Service and Options** section of the Shipping window (**Quickship** normally suppresses the label printing, on the assumption that your label has been produced using other means).

An address label contains the client address, along with the barcode and item identifier. If you do not need *Electronic Shipping Tools* to print address labels for you because they have been produced using other means, such as another application or filling in service type waybills, select the **Quickship** checkbox. For accurate rating, all you need to enter to **Quickship** is:

- (For Canada) the destination FSA. A full Postal Code is required for rural and commercial air stage freight destinations.
- (For USA) the destination State.
- (For International) no other information is required.

When **Quickship** is chosen, all fields in the **Ship To** section become disabled except for **Order ID / Reference #1** and **Country**, **Province/State** and **PC** depending on the destination, E-Mail notification information, and Cost Centre. Also, the **Search** button becomes disabled.

**Quickship** suppresses label printing. However, if your own labels have only client address data, you can print **Quickship** address labels, which have just the bar code and item identifier.

Note: To print the **Quickship** label, BOTH the **Print Address Label** and **Quickship** checkboxes must be selected. Furthermore, the **FULL Postal Code** is required for printing.

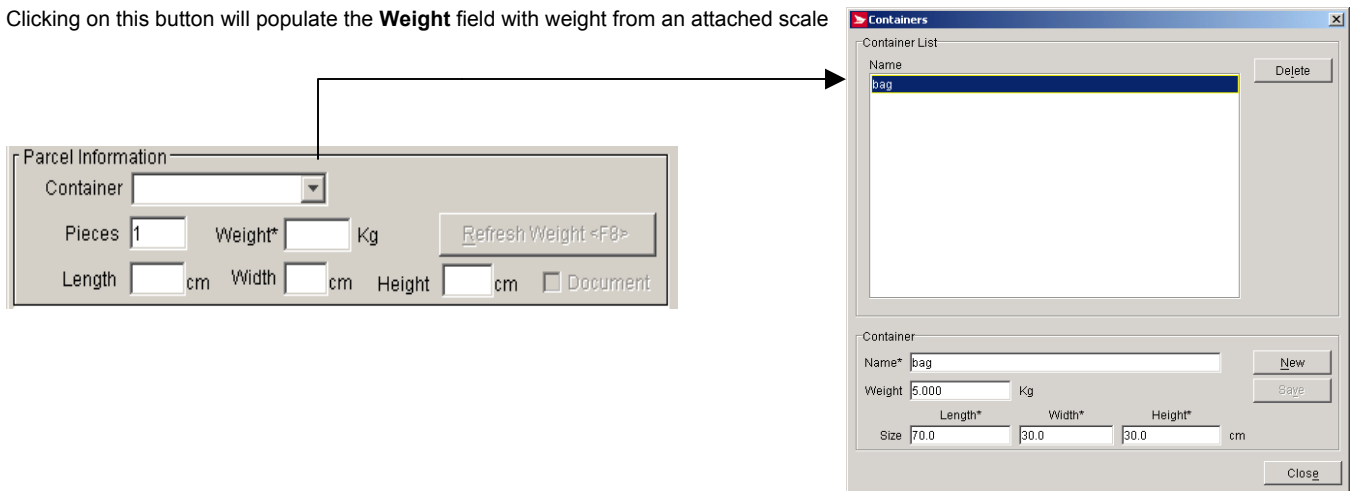
### 3.4 Parcel Information Section

Supply the parcel information in the **parcel information section**. You can manually enter the size and weight or select a predefined container from the **Containers** drop-down list. The container field has an “Add a New Container” selection in its drop down menu which allows you to create pre-defined container information (weight, length, width, height) for repeat mailings (i.e. CD Boxes always have the same weight and dimensions).

**Weight is the only mandatory field.** However, if you enter a value for **Length**, **Width**, or **Height**, you are required to enter values for the other two Size fields.

**Refresh Weight <F8>**

Clicking on this button will populate the **Weight** field with weight from an attached scale



The **Document** checkbox becomes enabled ONLY when the selected **Service Type** allows prepaid documents. Selecting the **Document** checkbox disables the **Customs** button (this is different from the Internet version).

Enter the number of pieces in the shipment. The default value is “1”.

#### Default Settings

The following defaults can be set as follows. Select **Site Information** from the **Data Maintenance** menu. Choose the **Shipping Preferences** command button, then the **Shipping** tab.

1. For the unit of measure, you can switch between Metric and Imperial. From the **Measurement Units** drop-down list, choose the desired option.
2. Enter the desired default value in the **No. of Pieces** field if different from “1”.
3. If you want a default-predefined container, select it from the **Containers** drop-down list.
4. If you choose **Manually Scan/Type Ids** as your Item Identifier default, a **Shipping Info Required** pop-up window will appear. It will prompt you to enter a valid barcode in the **Identifier** field. You can change the default to have the application use system-generated ID's.

Parcel Information Section	
FIELD NAME (* = mandatory)	FIELD CHARACTERISTICS
Parcel Information	To specify the weight and dimensions of the shipment (in the unit of measure specified in Shipping Preferences).
Container	Allows selecting a pre-defined container to automatically populate the weight and dimension fields (i.e. CD Boxes always have the same weight and dimensions).

	The drop-down list is always enabled and contains a blank entry and a special entry: Use the Container window to add a new shipping container type to the container list, remove existing ones or modify the properties of existing ones.  The list will be sorted alphabetically.
Pieces	To specify the volume of the shipment
Weight*	To specify the weight of the shipment. Can be manually entered, populated from the selected container or polled from a scale.
Length	To specify the length of the shipment
Width	To specify the width of the shipment
Height	To specify the height of the shipment
Document	Indicates whether or not the shipment is a document

### 3.5 Service and Options Section

This section allows you to select a Distribution service and add options related to this service. The value fields remain the same; a value must be entered where required.

Description	Value
<input type="checkbox"/> SIGNATURE OPTION	
<input checked="" type="checkbox"/> DELIVERY CONFIRMATION	
<input type="checkbox"/> COVER	
<input checked="" type="checkbox"/> COD	55.55
<input type="checkbox"/> OVERSIZE	
<input type="checkbox"/> UNPACKAGED	
<input type="checkbox"/> EVENING DELIVERY (6 p.m. - 9 p.m.)	
<input type="checkbox"/> SATURDAY DELIVERY (9 a.m. - 1 p.m.)	
<input type="checkbox"/> Proof of Age Required (18 years)	
<input type="checkbox"/> Proof of Age Required (19 years)	
<input type="checkbox"/> CARD FOR PICK UP	
<input type="checkbox"/> DO NOT SAFE DROP	
<input type="checkbox"/> LEAVE AT DOOR - DO NOT CARD	
<input type="checkbox"/> DELIVER TO DOOR	
<input type="checkbox"/> DELIVER TO PARCEL BOX	

In this section, select the **Service Type** and any desired options. Only services that are available to the contract currently selected are listed in the **Service Type** drop-down list. The list of available options change depending on the **Service Type**. If there are options included with the **Service Type**, they are already selected and you cannot deselect them.

Once you select the **Service Type**, if there is only one open **Manifest** that accumulates transactions of that **Service Type**, the **Manifest** name (i.e. date and time of creation), along with its **Local ID**, appears in the **Manifest** field. The field is display-only. If there is currently more than one manifest open for that **Service Type**, they appear in the **Manifest** drop-down list. You must select one, and then the field becomes display-only. However, if there is no existing Manifest, the field remains blank. When the transaction is processed, the corresponding Manifest is automatically created by the application.

Manifests are created in this order:

- 1) **Mailed On Behalf Of** customer number (i.e. you can have the same manifest type open for different customer numbers)
- 2) **Method of Payment** for each customer number (i.e. for one customer number, you can have the same manifest type open for different methods of payment).
- 3) **Service Types** for each customer number (click [here](#) for a listing of Manifest Types, and their associated Service Types)

Notes: Some International services and service options may not be available for every destination **Country**

Regarding **Coverage** for International destinations, if you get the error message "The value exceeds the maximum threshold of 0.00," this means that **Coverage** is NOT available at all for that destination **Country**.

If you wish to ship a parcel with the COD option, select the method of collection (COD Collection) from a drop-down list and enter the COD / Manual identifier when required.



The initial focus is on the **Service Type** field. If the current destination **Country** (i.e. Canada, USA, or International) is the same as that of the last successfully processed transaction, the **Service Type** of the last transaction appears, along with the associated Manifest in the **Manifest** field.

The list of available **Service Types** is also filtered according to the **Country** chosen on the **Ship** tab. However, if no **Country** has been chosen yet, ALL **Service Types** are listed in the drop-down list.

Note: If, for some reason, the **Country** field is blank but not all **Service Types** appear in the drop-down list, just go back to the **Ship** section and click **Clear**.

**ATTENTION!** It is advisable to choose the **Country** first. If you choose the **Service Type** first and then choose a **Country** for which that **Service Type** is not available, the **Service Type** field is cleared.

If the client address data in the **Ship To** section is obtained via a search on the **Order ID / Reference #1** in which the associated **Client ID** is found in an existing address book, then the list of available **Service Types** is NOT filtered based on the retrieved destination **Country**. Thus be aware to select a **Service Type** that is offered for the particular destination **Country**.

When you change the **Service Type**, the **Service** field in the **Calculate Preview** frame changes accordingly. However, you must click **Calculate** again to obtain the costs of the new **Service Type**.

### Default Setting

When the **Delivery Confirmation** option is selected (be aware that it can be automatically included with a **Service Type**, such as for all domestic services), an (Item) Identifier must be supplied. You can set the application to **use system-generated ID's**, or prompt the user to **manually scan/type ID's**. Select **Site Information** from the **Data Maintenance** menu. Choose the **Default Settings** tab, then the **Shipping** tab. Under **Item Identifier**, choose the desired radio button.

Service and Options Section	
FIELD NAME (* = mandatory)	FIELD CHARACTERISTICS
Service Drop Down List	Shipping and Delivery Services Mailing services available to the Contract currently selected. The Service Type drop down list is also filtered by the Destination Category (i.e. only domestic services will be listed if the Ship to Country is Canada, etc)
(Option) Description	Non-contracted options that are applicable to the selected service and country, and contract-specific options available to the currently selected contract.
Options – select checkbox	Indicates whether or not the service option on that line has been selected. Some options are automatically selected for a given service or are a pre-requisite for other options (i.e. Delivery Confirmation is included with Signature, Coverage and COD). Some options are mutually exclusive with others and selecting the first disables the other one. All these combinations and the related GUI manipulations (i.e. enabling, disabling and selecting options) are assumed to be driven from the local pricing engine.
Value	Value (dollar amount) associated with the service option.
COD Collection	The drop down list contains all the valid Method of Collections for COD.
COD / Manual Identifier	User-supplied identifier/Barcode associated with the item. Enabled only when Delivery Confirmation is available and: The setting to manually type or scan the barcode is selected (on Shipping Preferences window); or The COD option is selected and the label will NOT print on thermal paper

## 3.6 Charge To Information Section

Payment information is recorded in the pop-up screen (below right). Enable this screen by clicking on the update button in the Charge To Information section (below left). Within this pop-up window, supply the payment information for the transaction, such as the Mailed On Behalf Of customer number and Method of Payment. Click the apply button to return to the Charge To Information section.

Charge To Information

Manifest: 34 -Tue Feb 10:09:40:34 EST 2 [Update]

Customer: 0004639308 Contract: 0040020903

Paid-By: 0003130932 Payment: Account

Outlet: 1086 - LEO BLANCHETTE MPP - MONTREAL QC - H

Charge To Information

Manifest

Mailed by: 0007023210 Mailed On Behalf Of: 0007023210

Contract\*: 0040662505 Paid By Customer\*: 0007023210

Method of Payment\*: Account Selected Credit Card: [ ]

Outlet: 1086 - LEO BLANCHETTE MPP

[Apply] [Cancel]

Charge To Information Section	
FIELD NAME (* = mandatory)	FIELD CHARACTERISTICS
Mailed By	The current Customer Number
Mailed on Behalf Of*	The customer number of the owner of the Mailing
Contract*	The Contract (Number and Alias) on which to assign the item
Paid By Customer*	The customer number of the customer paying for the Mailing
Method of Payment*	Indicates the customer's chosen method of payment for the mailing
Selected Credit Card	Indicates the credit card that will be used for payment purposes
Outlet	Number and name (e.g. "9999 – Outlet Name") of the Canada Post location where the mailing will be inducted

## Command Buttons

**Apply**

Clicking on the Apply button:

- ❖ Performs validations.
- ❖ Saves the changes to the local database.
- ❖ Closes the Charge To Information window.
- ❖ Triggers a refresh of the Shipping window (for new Charge To Information, and defaults associated to new Customer).

**Cancel**

Closes the **Charge To** Information page

## Credit Card Data Entry Pop-Up Window

Access this pop-up window by selecting **Credit Card** from the **Method of Payment** drop-down list on the [Charge To](#) Information section of the **Shipping** window. The **Selected Credit Card** field becomes enabled. Choose **Other** from the drop-down list.

Select the desired option from the **Credit Card Type** drop-down list. Enter the **Credit Card Number**, **Expiry Date**, and **Credit Card Owner** name. Click **Apply**.

Entering credit card information on this window is for one-time use only. An alias (which contains the first and last four digits of the credit card number with the remainder being asterisks) is created to serve as an option in the **Credit Card Type** drop-down list afterwards.

If you have credit card numbers that you use regularly, you can establish them as aliases so that they appear in the **Selected Credit Card** drop-down list for selection on the **Charge To** section and thus you do not have to repeatedly enter the credit card information. To do this, supply the credit card information when you are having your Customer Profile set up on the CPC database.

**ATTENTION!** Even though you are allowed to select **Credit Card** as your **Method of Payment** and either choose a credit card alias or enter in credit card information, the transaction is processed **ONLY IF** the **Mailed By** and **Paid By** customer numbers are the same on the **Charge To** section.

## Command Buttons

**Apply**

Click this button to initiate validation of the entered values. If there are no errors, the **Credit Card Data Entry** window is closed.

**Cancel**

Click this button to return to the **Shipping** window.

Credit Card Data Entry Window	
FIELD NAME (* = mandatory)	FIELD CHARACTERISTICS
Credit Card Type *	Select the desired credit card type from the drop-down list.
Credit Card Number *	Enter the complete credit card number.
Expiry Date *	Enter the credit card expiry date in MM/YY format.
Credit Card Owner *	Enter the name of the credit card owner.

The **Mailed On Behalf Of** field is initially populated with the selected customer number on the **Customer** menu. When you change the customer number via the **Customer** menu, this field changes to reflect the new number. If you select a new customer number via this field, the change is reflected on the **Customer** menu.

If you select a **Mailed On Behalf Of** customer number that has a previous successfully processed transaction, the data for this transaction populates the **Charge To** section and the application automatically switches to the **Ship To** section (which may also contain data from the previous transaction). If the **Mailed On Behalf Of** customer number has no previous transaction, any data present is cleared.

## Customs Procedures

The screenshot shows the 'Customs' window with the following sections:

- Summary Information:** Reference Number, Currency\* (USD), Value, Reason for Export (Gift), Other, General Description, Non Delivery Instructions (Treat As Abandoned), Duty and Tax, Additional Information.
- Goods and Contents:** Selection from Predefined Goods (Description, New, Quantity, Apply), Description of Shipment Contents (table with columns: Quantity, Item / Part / SKU #, Description, Unit Weight, Tariff Code, Country of Origin, Province of C, Add..., Edit..., Delete...), Primary Origin of Goods (Country of Origin, Province of Origin).

Access this window by clicking the **Customs** button on the **Shipping** window.

Customs information is never required for domestic shipments. Therefore, the **Print Customs Document** checkbox and **Customs** button are not enabled when the destination Country is Canada.

BOTH the **Country** on the **Ship To** section, and **Service Type** on the **Service and Options** section, must be selected to enable the **Customs** button. Since customs information is *mandatory* for Purolator Intl PuroLetter, Purolator Intl PuroPak, Purolator International, and Commercial\* Expedited Parcel - USA, this is all that is required to access the **Customs** window.

However, if the **Service Type** is not one of the above-mentioned, the **Print Customs Document** checkbox must also be selected to enable the **Customs** button.

**ATTENTION!** The total weight of all goods listed for customs purposes must not be greater than the keyed item **Weight** on the **Ship To** section of the **Shipping** window.

The **Customs** window collects all the required data elements to complete the appropriate document type for the shipment. The business rules around customs declaration by service have been coded into *Electronic Shipping Tools*. The collection of mandatory information will reduce the necessity for the user to understand customs reporting and declaration rules. Different information is needed depending on the customs document required, so certain fields are disabled according to the type of document to produce.

Printing of the customs document occurs when you click **Process/Print** ONLY IF the **Print Customs Document** checkbox has been selected. Note: There is no preview functionality of customs information prior to printing it as in the Internet version.

The **Customs** window stores customs information that is to be printed on the appropriate customs document. It consists of two sections. The characteristics of this window are outlined below:

Customs Window Section	Window Characteristics
1. Summary Information about the Shipment	This section consists of header information such as the total value (for customs purposes) of the shipment, the currency used to define this value, the reason for export, non-delivery instructions, and duty taxes paid on the shipment. It also contains a reference number that you can supply for audit purposes.
2. Goods and Contents	This section allows you to describe in detail the contents of the shipment. Your list can be a combination of predefined goods and items that you define for one-time use only. If printed, the actual customs document will be supplemented with data received from the Shipping window.

## Command Buttons

(Following two buttons are located within the **Selection from Predefined Goods** frame)

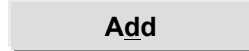


Click this button to access the [Pre-defined Goods](#) window to enter data for new predefined goods. Upon saving the data, the new goods description is inserted in the **Description** drop-down list for selection.



This button becomes enabled when the **Quantity** value has been entered. Click it to add the selected predefined goods description to the **Description of Shipment Contents** frame list.

(Following three buttons are located at the right within the **Description of Shipment Contents** frame)



Click this button to access the [Maintain Goods](#) window to enter data for goods that are included in this particular shipment (i.e. one-time use).



Click on a line item in the **Description of Shipment Contents** frame list to select it. This button becomes enabled. Click it to edit the line item. The [Maintain Goods](#) window appears.

You can also double-click on a line item to bring up the **Maintain Goods** window for editing.

Note: If you edit a line item that is predefined goods, the changes apply ONLY to this particular line item (i.e. the data of the predefined goods remains unchanged).



Click on a line item in the **Description of Shipment Contents** frame list to select it. This button becomes enabled. Click it to remove the line item from the list. A Yes/No confirmation pop-up window appears.

(Following two buttons are located at the bottom of the **Customs** window)

**Apply**

Click this button to save the customs information and close the **Customs** window.

**Cancel**

Click this button to exit the **Customs** window without saving the new customs information or changes to existing information. Even if you did not enter any data or make any changes, a Yes/No/Cancel confirmation pop-up window always appears asking you if you want to save your changes.

<b>Customs Window</b>	
FIELD NAME (* = mandatory)	FIELD CHARACTERISTICS
<b>Summary Information Section</b>	
Reference Number	Enter any reference number or code that you want to use to identify the shipment. Maximum of 15 characters.
Customs Currency *	Enter an abbreviation for the currency used to record the total value of goods in the shipment.
Customs Value	For Purolator Intl PuroLetter transactions, enter the value of the shipment.  For other shipments, this field shows the total value of the shipment calculated from the detailed description of the shipment contents. It changes as items are added/deleted. You cannot change this value directly.
General Description	Enter a general description of the shipment contents.
Duty and Tax	Display-only. Calculated by the application based on the total value of the goods in the detailed description of the shipment contents.
Reason for Export ❖ Commercial Sample ❖ Gift ❖ Trade Show ❖ Repair Warranty ❖ Document ❖ Other/Not applicable	Always enabled unless the Service Type is Purolator Intl PuroLetter.  For Xpresspost International, Xpresspost USA, Xpresspost USA Prepaid or USA & International Small Packets services, this field is optional and defaults to a blank line. Otherwise, the field does not contain a blank line and defaults to the first value in the list.
Non Delivery Instructions: Treat As Abandoned Return to Sender Via Surface Return to Sender Via Air	Instructions as to what to do with the shipment if undeliverable. Always enabled, with no blank entry line available. The Non Delivery Instructions drop down list is filtered based on the Service Type selected: For USA or International Small Packets Surface, only Return to Sender Via Surface is displayed. For USA or International Small Packets Air, only Return to Sender Via Air is displayed. For a service that produces the Commercial Invoice or Service Type of Xpresspost International, only Treat As Abandoned is displayed. For all other services, default to Treat as Abandoned.
Additional Information	Additional information/comments relevant to the shipment to aid the customs agent in clearing the package.
<b>Goods and Contents Section</b>	
Selection from Predefined Goods - Description	From the drop-down list, select the desired description of goods that have been predefined using the Pre-defined Goods window. Select first prior to entering corresponding quantity in adjacent field.  By predefining the goods that you ship, you can quickly build a detailed description of the shipment for customs purposes.
Selection from Predefined Goods - Quantity	Mandatory if a predefined goods description is selected. Enter the quantity of these goods that are included in the shipment.
Description of Shipment Contents frame	Lists the quantity, inventory number, description, unit weight, and other related data of all the goods in the shipment. Display-only. Taken from data entered for chosen predefined goods and for one-time goods defined via the Maintain Goods window. Refer to the field descriptions of the Maintain Goods window.
Primary Origin of Goods – Country of Origin	From the drop-down list, select the country in which the shipment contents were manufactured.
Primary Origin of Goods – Province of	Enabled only when the selected Country of Origin is Canada AND the destination

Origin	Country is USA. From the drop-down list, enter the province in which the shipment contents were manufactured.
--------	---

## Maintain Goods Window

Access this pop-up window by clicking the Add button at the right within the **Description of Shipment Contents** frame of the **Customs** window.

Use this window to enter data for goods that are included in one particular shipment (i.e. for one-time use only). This means that these goods will not appear in the **Description** drop-down list in the **Selection from Predefined Goods** frame.

## Command Buttons



Click this button to save the new data or changes made to existing data and close the **Maintain Goods** window. If you have entered new data, it is displayed in a line item for the one-time goods in the **Description of Shipment Contents** frame list upon return to the **Customs** window.



Click this button to exit the **Maintain Goods** window without saving the new data or changes to existing data. Even if you did not enter any data or make any changes, a Yes/No/Cancel confirmation pop-up window always appears asking you if you want to save your changes.

Maintain Goods Window	
FIELD NAME (* = mandatory)	FIELD CHARACTERISTICS
Item / Part / SKU #	Enter any inventory number or code that you want to use to identify this individual item. Maximum of 15 characters.
Quantity *	
Description *	Enter a description of the individual item.
Unit Weight	Enter the weight of the individual item.
Customs Value *	Enter the value of the individual item for customs purposes.
Tariff Code	Enter the three-character tariff code.  The tariff code is based on the origin of the goods and any trade agreement supporting the import and export of those goods. The tariff is applied through commodity rating by Customs or a Customs Broker/Traffic Manager.
HS Code	Enter the Harmonized System (HS) number of the item.  The HS Code is used by customs to identify items in a shipment, allowing faster clearing of a shipment.
Duty Rate	Enter the percentage duty rate that applies to the current goods.  The duty rate is based on the rate assigned to the goods using the Harmonized Tariff

	Schedule by Customs or a Customs Broker/traffic manager.
Duty Amount	Display-only. This field shows the amount of duty payable on one item, based on the Duty Rate.  Before the goods are shipped, the Duty Amount is multiplied by the shipment quantity to determine the total duty.
Tax	Type the tax payable on one item. You can use this field to specify any national tax stipulated by the destination Country, as identified by Customs or a Customs Broker/Traffic Manager.  Before the goods are shipped, the Tax amount is multiplied by the shipment quantity to determine the total tax.
Excise	Type the excise tax payable on one item. This field is used to record any tax on luxury items as assigned by the destination Country. Customs or a Customs Broker/Traffic Manager identifies the excise tax value during the commodity rating process.  Before the goods are shipped, the Excise amount is multiplied by the shipment quantity to determine the total excise.
Territory Tax	Type the territory tax payable on the current goods. You can use this field to specify any provincial, state, or territorial tax stipulated by the destination Country, as identified by Customs or a Customs Broker/Traffic Manager. Before the goods are shipped, the Territory Tax amount is multiplied by the shipment quantity to determine the total territory tax.
VAT	Type the Value Added Tax (VAT) payable on the current goods. When shipping to international destinations, use this field to record the VAT or other similar tax, if applicable, as identified by Customs or a Customs Broker/Traffic Manager.  Before the goods are shipped, the VAT amount is multiplied by the shipment quantity to determine the total VAT.
Country of Origin	From the drop-down list, choose the country in which the item was manufactured.
Province	Enabled only when the selected Country of Origin is Canada AND the destination Country is USA. From the drop-down list, enter the province in which the item was manufactured.

### Enabled Fields According to Service Type

USA Services	International Services	Both USA and Int'l
1. Xpresspost USA	5. International Parcel Air	9. Purolator Intl PuroLetter
2. Xpresspost USA Prepaid Ind	6. International Parcel Surface	10. Purolator Intl PuroPak
3. USA Small Packets Air Mail	7. Intl Small Packets Surface	11. Purolator International
4. USA Small Packets Surface	8. Intl Small Packets Air	

Refer to above table for service number (e.g. Xpresspost USA has service number 1). Service numbers have no meaning outside of these tables.

FIELD NAME	SERVICE NUMBER										
	1	2	3	4	5	6	7	8	9	10	11
Reference Number	√	√	√	√	√	√	√	√	√	√	√
Customs Currency	√	√	√	√	√	√	√	√	√	√	√
Customs Value									√		
General Description									√	√	√
Duty and Tax	*	*	*	*	*	*	*	*	*	*	*
Reason for Export	√	√	√	√	√	√	√	√		√	√
Non Delivery Instructions	√	√	√	√	√	√	√	√			
Additional Information									√	√	√
Goods and Contents frame - Description	√	√	√	√	√	√	√	√		√	√
Goods and Contents frame – Primary Origin of Goods									√	√	√

Display-only. Calculated by the application.

A Customs Document, a Customs Declaration Dispatch Note, or a Commercial Invoice is produced, depending on the **Service Type** used and the Declared Value for Customs:

1. Prints the Customs Document when:

- The Destination Country is USA, except for Commercial\* Expedited Parcel – USA or;
  - The Service Type used is International Small Packet (Air or Surface) and the total Declared Value for Customs is less than or equal to \$300.00.
  - One (1) copy is generated.
2. Prints the Customs Declaration Dispatch Note when:
- The Service Type used is International Parcel (Air – where available - or Surface) or;
  - The Service Type used is Xpresspost – International where applicable or;
  - The Service Type used is International Small Packet (Air or Surface) and the total Declared Value for Customs is greater than \$300.00.
  - Four (4) copies are generated.
3. Prints the Commercial Invoice when:
- The Service Type used is Commercial\* Expedited Parcel – USA. The Service Type used is Commercial\* Expedited Parcel – USA. One copy is generated if required. The Commercial Invoice will only be generated and printed if the user has selected the Print Customs Document checkbox. Copy (ies) must be inserted into the plastic pouch.
  - The Service Type used is Expedited Parcel – USA. One copy is generated if required. The Commercial Invoice will only be generated and printed if the user has selected the Print Customs Document checkbox. Copy (ies) must be inserted into the plastic pouch.

Note: To have the application print the customs document, you must select the **Print Customs Document** checkbox on the **Ship To** section of the **Shipping** window.

## Additional Procedures for Commercial\* Expedited Parcel - USA

When shipping items valued over US\$200.00, Electronic Shipping Tools will prompt you to supply the following data items in order to take full advantage of *Commercial Customs Clearance*:

- Recipient's U.S. Internal Revenue Service number or Social Security number;
- Appropriate customs Harmonized System code and;
- Country and province (only if the country is Canada) of the manufacturer of the item(s) shipped.

Once the daily customs information is received electronically, it will be forwarded to Canada Post's broker, PBB Global Logistics.

To set up your account with PBB, simply complete the documentation available at this address:

## Manifest Types and Associated Service Types

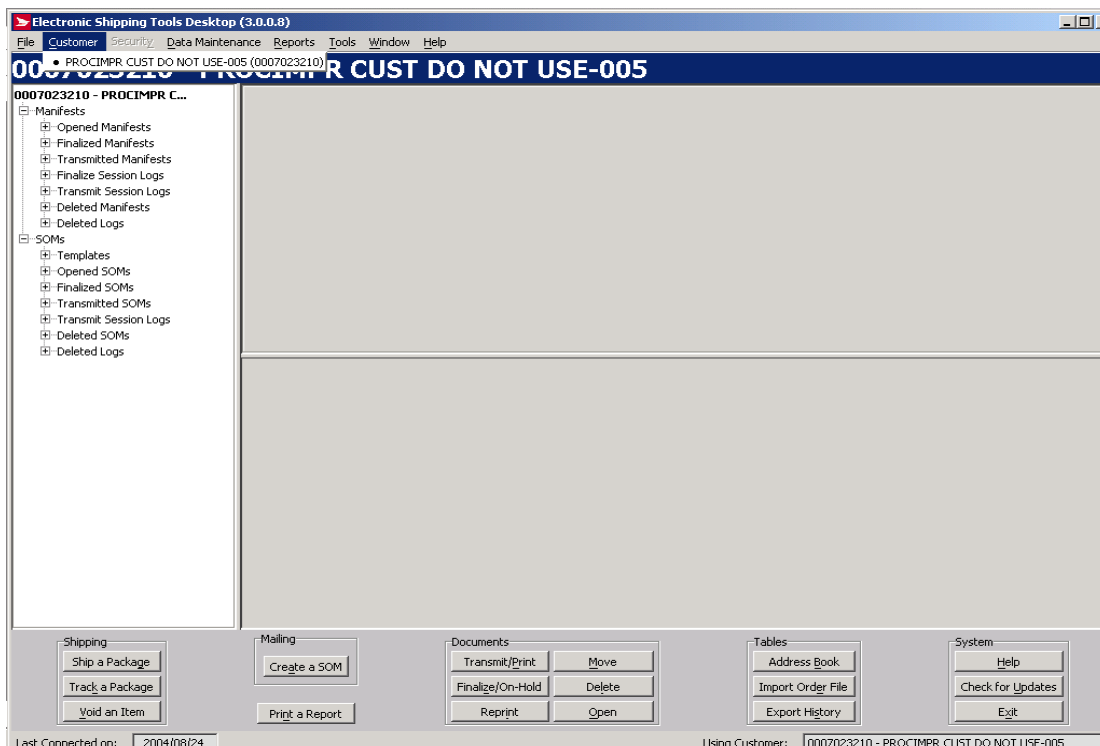
The following list is effective as of July 2003:

MANIFEST TYPE	SERVICE TYPES
Commercial Air Stage Freight	ASF Non Food Items ASF Non Food Items Rate G ASF Nutrit. Perish Food Rate A ASF Nutrit. Perish Food Rate E ASF Other Food Rate B ASF Other Food Rate F Inuvik Nutritious Perish Food
Domestic Bulk	Exp. Parcel Piece/Kilo Reg. Parcel Piece/Kilo
Commercial* Expedited Parcel USA/Xpresspost	Xpresspost USA Xpressost USA Prepaid Ind
International Courier	Purolator Intl PuroLetter Purolator Intl PuroPak Purolator International
Priority Courier	Priority Courier Piece Rated



	Priority Courier Prepaid Ind
Regular/Expedited/Xpresspost	Expedited Parcel Piece Rated Regular Parcel Piece Rated Xpresspost Piece Rated Xpresspost Prepaid Induction
USA/International	Intl Small Packets Air Intl Small Packets Surface International Parcel Air International Parcel Surface USA Small Packets Air Mail USA Small Packets Surface
Xpresspost International	Xpresspost International

## 4.0 Customer Menu



The **Customer** menu displays the **Mailed On Behalf Of** customer names, along with their numbers, that are configured on your *Electronic Shipping Tools* desktop application. The **Mailed On Behalf Of** customer is the customer who owns the mailing (i.e. the customer on behalf of whom the mailing is being prepared).

When you have more than **Mailed On Behalf Of** customers, use the **Customer** menu to select the appropriate one. Note that your selection here will affect the contracts and services available in subsequent windows.

When you select the desired customer number via the **Customer** menu, the **Mailed On Behalf Of** field in the **Charge To** section of the **Shipping** window becomes populated with this number. You can also change the customer number by selecting from this field's drop-down list. If you do this, the change is reflected in the **Customer** menu.

## 5.0 Security Menu

The **Security** menu is available only when **Security Enabled** is selected on the **Options** tab in the **Site Information** window.

Use the **Security** menu to add and delete Electronic Shipping Tools users, and determine the Electronic Shipping Tools functions they are allowed to access.

### User Profile Window

Access this window by selecting **User Profile** from the **Security** menu

### Overview

As a system administrator, use the **User Profile** window to add new Electronic Shipping Tools users to the system, and assign access privileges to those users. You can also delete users, or modify the information for existing users. You will need administration privileges in your profile to perform the functions on this window.

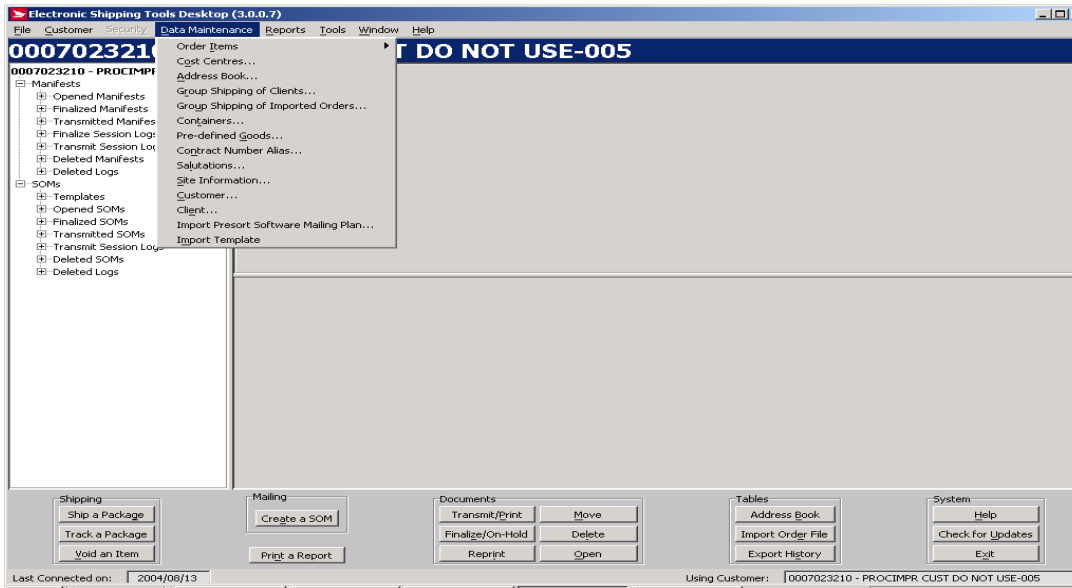
### Command Buttons

SECURITY MENU	
COMMAND OR MENU ITEM	RESULT OF INVOCATION
User Profile list	Select a User Profile
List View	Display User Profile detail information in the User Profile information section User Ids must be greater than 5 characters.
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 8 characters.
New	Allows you to create a New User Profile in the local database

## 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.
Order Creation	Allows the user to create, modify or delete orders.
Reporting	Allows the user to generate and print reports.

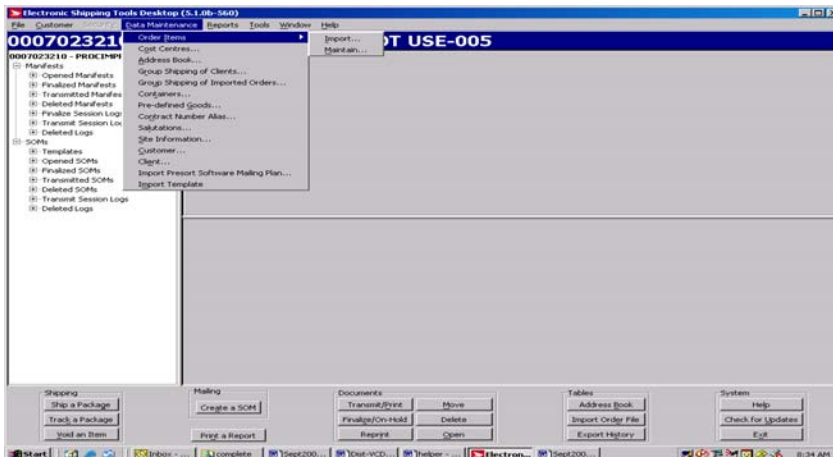
## 6.0 Data Maintenance Menu



Use the **Data Maintenance** menu to manage your customer data and site information. You can also configure many aspects of *Electronic Shipping Tools* from this menu, along with assigning aliases (i.e. meaningful names) to contracts and cost centers.

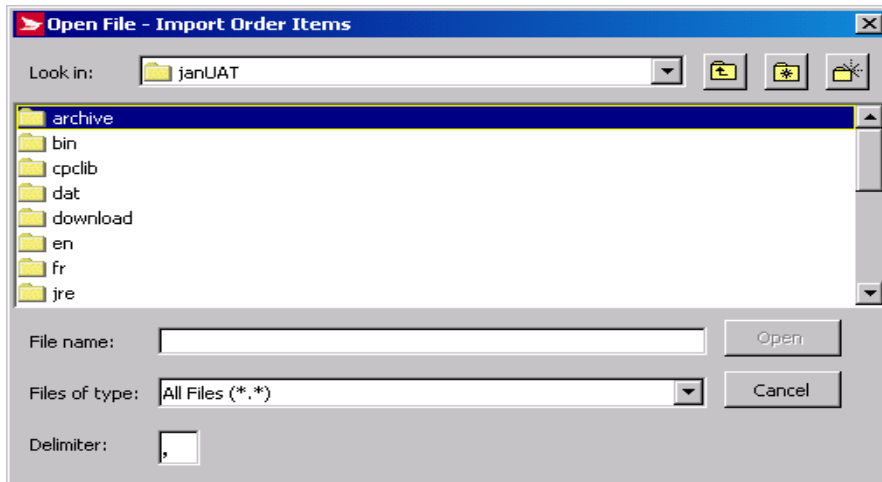
### 6.1 Orders Items

The **Order Items** submenu provides two options. Select **Import** to access the **Open File – Import Order Items** pop-up window, where you can import order entry information created in other applications. Select **Maintain Imported Order Items** window, where you can edit and delete imported order items, import more order items, or even create new order items.



## Import Order Items

Access the **Open File – Import Order Items** pop-up window by selecting **Order Items – Import** from the **Data Maintenance** menu or clicking the **Import** button on the **Imported Order Items** window.



Use this window to import order entry information produced outside of *Electronic Shipping Tools* into the application database. After you import a file of Imported Order Items, they appear in the frame list of the **Imported Order Items** window (Data Maintenance menu > Order Items > Maintain).

The Import Order Items functionality leverages the Sell Online Engine to allow interface to the shipment details created through the website interface solution.

*Electronic Shipping Tools* uses a standard Window file location window to prompt you for the name and location of the file to import. Follow the prompts to locate and import the mailing item add-ons (import order) information.

**IMPORTANT REGARDING VALIDATION!** The Import functionality performs only simple formatting-related edits. It does NOT enforce the application's business rules. This means that you can import completely wrong data, such as non-existent article numbers (representing Service Types) and service options selected for Service Types that do not offer them. However, when you try to process this data in the application, it will be rejected. However, in the latter example, you will not get any kind of error or notification message; the application will just not apply charges for invalid options.

The **entire** file is rejected if even just one record does not contain the correct number of fields as delimited by commas.

For the *Electronic Shipping Tools* record types, the only fields that are mandatory to pass import validation are **Record Type**, **Order ID / Reference #!**, and **Service** (Record Type 3 only). If there are records with these fields missing, they will not be processed. Their errors are captured and captured in an **Imported Order Entry Error File** for your review. All other records are processed by the application.

**Keep in mind, though, that some optional (for import validation) fields are REQUIRED for the application's business rules, such as Address Line 1 and Country Code.** These fields could be obtained via address books if the associated **Client ID** exists in them, so be aware.

**Duplicates:** The application does NOT filter out even exact (i.e. field per field) duplicate records. Be aware of this so as not to clutter the application database.

**ATTENTION!** If you are manually creating a text file via a text editor, do NOT press <ENTER> after the last record.

### Record Types with Electronic Shipping Tools

Two types of Original records containing order entry data can be imported using this window:

1. **Record Type 2**, which contains exactly 19 fields.
2. **Record Type 3**, which contains exactly 44 fields, of which the first 19 are those of Record Type

Four types of extended records containing order entry data can be imported using this window:

1. Record Type 4, which contains exactly 23 fields.
2. Record Type 5, which contains exactly 52 fields.

3. Record Type 6, which contains exactly 66 fields.
4. Record Type 7, which contains exactly 17 fields.

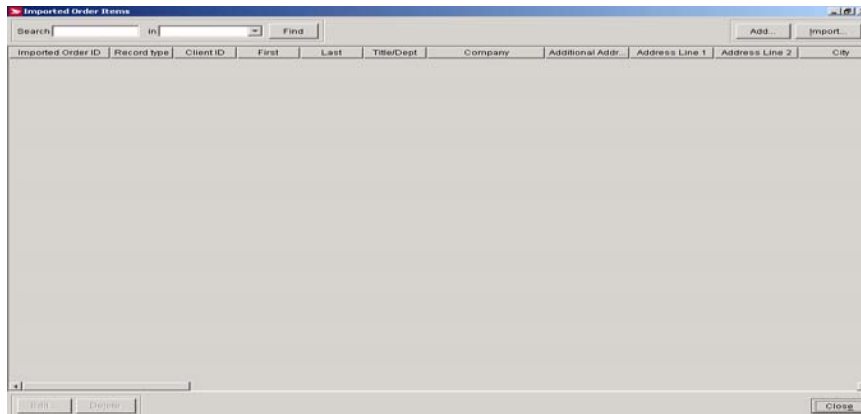
For further information regarding the layout of the imported files, please access the following link;  
[http://www.canadapost.ca/business/offerings/eship\\_tools/pdf/import\\_specs-e.pdf](http://www.canadapost.ca/business/offerings/eship_tools/pdf/import_specs-e.pdf)

## File Format

The import file must be a comma-delimited ASCII flat file where character and non-integer numeric fields are enclosed in double quotes (""). Where no information is available, you need not enter a blank entry (i.e. "") **EXCEPT if it is the last field.**

Click [here](#) if you are reading this guide online to view the Order Entry File Structure. If not, please visit the Canada Post website ([www.canadapost.ca](http://www.canadapost.ca)) > Business > select *Electronic Shipping Tools* from the Shipping and Delivery drop-down list > Benefits and Features (at right) > click on Distribution at bottom > Order Entry more... > to see the Order Entry File Structure.

For the most current details on import file specifications, contact the *Electronic Shipping Tools* Help Desk weekdays from 7:00 am to 8:00 pm (Eastern Standard Time) at 1-800-277-4799.



## Command Buttons

**Find**

Click this button to initiate the Search process. Only those records that match the entered search criterion in the specified field are displayed in the frame. You can search on the following fields: Order ID / Reference #1, Client ID, First (Name), Last (Name), Company, City, Province/State, and Country Code.

Note: You cannot search for records that have a blank entry for a particular field. Even though this button is enabled with no search criterion entered, the Search functionality does NOT return such records.

**Add**

Click this button to access the **Maintain Imported Order Items** window tabs to create your own "Imported" Order Items.

**Import**

Click this button to access the **Open File – Import Order Items** window to locate a file of Imported Order Items to import into the application database.

**Edit**

Click on an Imported Order Item in the frame list to select it. Click this button to access the **Maintain Imported Order Items** window to modify the data of this Imported Order Item.

You can also access this window for editing by double-clicking on the Imported Order Item in the frame list.

**Delete**

Click on an Imported Order Item in the frame list to select it. Click this button to delete it. A Yes/No confirmation pop-up window appears.

**Close**

Click this button to exit the **Imported Order Items** window.

## Maintain Imported Order Item

Access this window by clicking **Add** (to create your own “imported” order item record) or **Edit** (to modify the data of the selected Imported Order Item) on the **Imported Order Items** window.

Client	
Imported Order ID	
Client ID	
First	
Last	
Title/Dept	
Company	
Additional Address Info	
Address Line 1	
Address Line 2	
City	
Province/State	
Postal/ZIP Code	
Country Code	
Voice Phone Number	
Fax #	
E-Mail	
Tax Id/IRS/VAT	

### Overview

The **Maintain Imported Order Items** window is used to edit Imported Order Items that you have imported via a file from another system or application, although you may also use it to create your own “Imported” Order Items as needed.

On the **Client Info** tab, the initial focus is on the **Country Code** field. When the **Country Code** is selected, the **Postal/Zip Code** field becomes enabled. Also, if the **Country Code** selected is for Canada or USA, the **Province/State** field becomes a drop-down list populated with the valid values. On the **Service Info** tab, the initial focus is on the **Service** field. On the **Size & Weight** tab, the initial focus is on the **Weight** field.

The only mandatory field for the three tabs is **Order ID / Reference #1**. However, keep in mind that certain fields, such as all three-size fields, are required to pass the application’s business rule validations.

If the **Client ID** matches a defined recipient in your address books, that recipient’s information will be associated with the Imported Order Item ONLY IF the Imported Order Item does not contain all mandatory data for the **Ship To** section of the **Ship** tab of the **Shipping** window.

**ATTENTION!** If you edit an Imported Order Item that does not have a **Service Type** selected for it, and you do not add one, you get the message “Removing the Service Type will remove all Service Info. Proceed anyway? Y/N”. The application is just reminding you that you may want to enter a **Service Type** for that particular Imported Order Item. Otherwise, the **Service Type** chosen on the **Service and Options** section of the **Shipping** window will be used.

## Client Info Tab

<b>Client Info Tab</b>	
<b>FIELD NAME (* = mandatory)</b>	<b>FIELD CHARACTERISTICS</b>
<b>Client Info Tab</b>	
Imported Order ID*	A unique number or other identifier that you use to identify this order item. Once defined, you should not change the Imported Order ID in order to maintain a proper audit trail of your shipments.
Client ID	A unique number or other identifier that you use to identify the recipient associated with this order item. If you use the same identifier as used for a defined recipient in your address books, additional information for this recipient will be automatically taken from the defined recipient's record ONLY IF the order item does not contain all mandatory data for the Ship To section of the Shipping window.
First (Name)	The first name of the recipient associated with this order item.
Last (Name)	The last name of the recipient associated with this order item.
Title/Dept	The title of the principal contact at the recipient, and/or the department to which he belongs.
Company	The company name of the recipient.
Additional Address Info	Any additional address information not provided in the other address fields of the order item. Note: This item is included for future use only and is not currently printed on your address labels.
Address Line 1	Enter the street address of the recipient.
Address Line 2	If more space is needed for the street address, use this field.
City	The municipality/city of the recipient.
Province/State	This field's label changes depending on the Country selected. It contains the Province or State of the recipient. For Canada and the United States, the provinces and states are available using a drop-down list.
Postal/Zip Code	This field's label changes depending on the Country selected. It contains the Postal Code or Zip Code of the recipient. For the Postal Code, the application enforces the format A9A 9A9 and automatically enters the required space.
Country Code	From the drop-down list, select the appropriate country of residence of the recipient.
Voice Phone Number	The main telephone number of the recipient.
Fax #	Enter the recipient Fax # associated with this order item(if desired)
E-Mail	Enter the recipient e-mail address associated with this order item (if desired)
Tax ID/IRS/VAT	
Item Reference #2	Enter a second item reference #, if required
E-mail #2	Enter a second email address, if required

## Service Info Tab

<b>Service Info Tab</b>	
FIELD NAME (* = mandatory)	FIELD CHARACTERISTICS
<b>Service Info Tab</b>	
Service Type	Select the shipping product offered by Canada Post that should be used when shipping this order item. You can select from all available products. Therefore be aware to select a product that you use at your site AND that is available for shipping to the recipient's address (e.g. do not select a domestic product for international shipments). On this tab, the application does not validate the service options against the selected Service Type. Therefore be aware to select options that are available for the selected Service Type. Also, if you change the Service Type, remember to update the service options.
Document Indicator	Select to indicate that you are shipping a document.
Delivery Confirmation Indicator	Select to indicate that you want confirmation of delivery.
Oversize Indicator	Select if the package to be shipped should incur extra charges for exceeding the allowed dimensions for the selected Service Type.
Signature Indicator	Select if you require Canada Post to record and make available the name of the person who signed for delivery.
Do Not Safe Drop Indicator	Select if you do not want the shipment to be left in a safe location for the recipient (e.g. between front doors) when nobody is present to accept the delivery.
Card for Pickup Indicator	Select if you would like a card left so that the recipient can pick up the shipment at a postal counter.
Proof of Age Required (18)	Select to indicate that the item is delivered once the proof of age (18) has been verified.
Proof of Age Required (19)	Select to indicate that the item is delivered once the proof of age (19) has been verified.
Leave at Door Indicator	Select to have the mail carrier leave the parcel at the destination address if the recipient is not present (rather than leave a card indicating a delivery attempt).
Registered Indicator	Select to have the shipment sent by Registered Mail, typically used to send important items that require proof of mailing and/or proof of delivery.
Special Delivery Indicator	Select to have the shipment sent Special Delivery, which helps expedite mail delivery.
Advice of Receipt Indicator	For U.S. shipments, select to receive a signed card from the recipient acknowledging receipt of the shipment.
Email Notification Indicator	Select to indicate that you are notifying your customer via e-mail
Insured Amount	Enter an amount to select the coverage option and have that amount of insurance applied to the shipment.
COD Amount	Enter an amount to select the COD option and have that amount collected upon delivery.



Method of Collection	Select the required method of collecting the COD amount: Cash Cash or cheque Post-dated cheque.
Evening Delivery (6 p.m. – 9 p.m.)	Select to indicate that the item is delivered between 6 P.M. and 9 P.M. during the week
Saturday Delivery (9 a.m. – 1 p.m.)	Select to indicate that the item is delivered between 9 A.M. and 1 P.M. on Saturday
Pick Up @ The Post Office	Select to indicate that the item should be picked up at the post office
Notification Method	
Deliver to Door	Select to indicate that the item should be delivered to the door
Deliver to Parcel Box	Select to indicate that the item should be delivered to the parcel box
Card Notification Only	

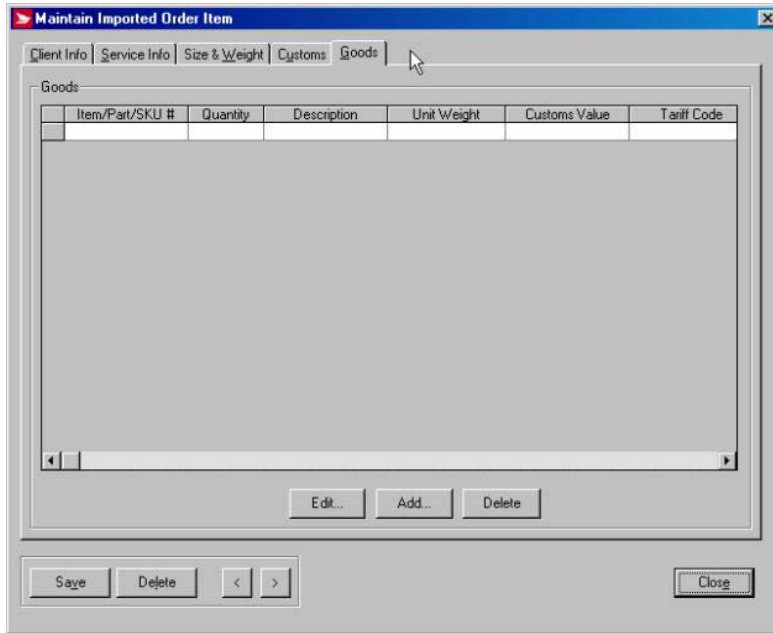
## Size & Weight Tab

Size and Weight Tab	
FIELD NAME (* = mandatory)	FIELD CHARACTERISTICS
<b>Size &amp; Weight Tab</b>	
Weight	The weight, in <b>grams</b> , of the package to be shipped for this order item.  Note: The Weight field on the Ship tab of the Shipping window is in <b>kilograms</b> .
Length	The length, in millimeters, of the package to be shipped for this order item. Should also enter the width and height.
Width	The width, in millimeters, of the package to be shipped for this order item. Should also enter the length and height.
Height	The height, in millimeters, of the package to be shipped for this order item. Should also enter the length and width.

## Customs Tab

<b>Customs Tab</b>	
FIELD NAME (* = mandatory)	FIELD CHARACTERISTICS
<b>Customs Tab</b>	
Customs Currency*	Acronym of the currency used to define dollar amounts - such as USD.
Customs Value	Total declared value of the goods for Customs purposes. Only needs to be supplied when goods are not individually supplied (i.e. total cannot be calculated).
Duty and Tax	Total Duty and Taxes to apply to the shipment.
Reference Number	User reference information to print on the Customs document.
General Description	General description of the shipment to print on the Customs document, when individual goods are not printed (such as the Purolator Bill of Lading).
Additional Information	Additional Customs Information to print on the Commercial Invoice.
Reason for Export*	Valid codes are: <ul style="list-style-type: none"> <li>• DOC for Document</li> <li>• GIF for Gift</li> <li>• OTH for Other/Not Applicable</li> <li>• REP for Repair Warranty</li> <li>• SAM for Commercial Sample</li> <li>• TRD for Trade Show</li> </ul>
Reason for Export Comment	Used to define the reason for export when Reason for Export = Other.
Non-Delivery Instructions	Valid codes are: <ul style="list-style-type: none"> <li>• RETAIR for Return via Air</li> <li>• RETSUR for Return via surface</li> <li>• TREABA for Treat as Abandoned</li> </ul>
Country of Origin	The Country of Origin of goods to be displayed on the Customs document when only one can be printed (as opposed to printing the one for each individual goods in the shipment).
Province of Origin	The Canadian Province of Origin of goods to be displayed on the Customs document when only one can be specified.

## Goods Tab



Goods Tab	
FIELD NAME (* = mandatory)	FIELD CHARACTERISTICS
<b>Goods Tab</b>	
Item/Part/SKU #	Identifies a code for the item.
Quantity*	Identifies the quantity of the good.
Description	Identifies a description for the item.
Unit Weight	Identifies a weight (in grams) for the individual item.
Customs Value	Identifies the value for the item for customs purposes.
Tariff Code	Identifies the tariff code for the item based on the origin of the goods.

## Command Buttons



Click this button to access the **Maintain Imported Order Items** window to modify the data of this Imported Order Item.



Click this button to access the **Goods** window to pre-define or to fully define the imported goods that you want to add.



Click this button to remove the currently displayed Imported Order Item.



This button is enabled when either new data has been entered or a change has been made to existing data. It clears the three **Maintain Imported Order Items** of all data to make them ready for a new record. You are returned to the **Client Info** tab.



Click this button to display the previous Imported Order Item *if multiple ones have been selected for editing*.



Click this button to display the next Imported Order Item *if multiple ones have been selected for editing*.

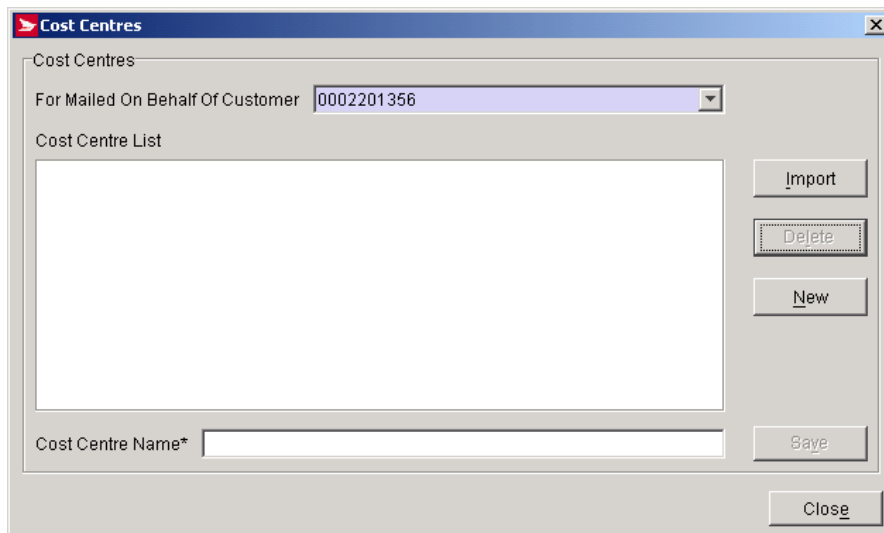


Click this button to exit the **Maintain Imported Order Items** window. If new data has been entered or a change has been made to existing data, then a Yes/No/Cancel confirmation pop-up window appears asking you if you want to save your changes.

## 6.2 Cost Centers

Select **Cost Centres** to access the **Cost Centres** window, where you can import cost centre names to the list or create new names to be used by the application.

Access this window by selecting **Cost Centres** from the **Data Maintenance** menu or from the drop down menu of the **Cost Centre** field on the **Ship To** section of the **Shipping** window.



### Overview

Cost Centers are used to allocate the costs of shipping transactions. Use the **Cost Centers** window to maintain a list of user-defined Cost Centers (i.e. adding and deleting Cost Centers to the list, and modifying the names of existing Cost Centers).

If there are any Cost Centers in the list for the selected **Mailed On Behalf Of Customer**, the initial focus is on the first Cost Centre in the list.

You can import Cost Centre information produced outside of *Electronic Shipping Tools* by using the **Import** button on the **Cost Centers** window.

Duplicates are filtered from the Cost Centre List, which is sorted alphabetically.

Once a Cost Centre is associated to a shipment, it cannot be deleted from the list.

**Format for files** The import file must be line-separated (i.e. carriage return – CR, line feed – LF). Enter one **Cost Centre Name** per line. The system loads the first 40 characters up to the carriage return/line feed, or every line in the file. No parsing or edits are made on the data you provide. Any special characters leading, embedded, or following the **Cost Centre Name** will be loaded into the application database without being edited by the application.

Cost Centers	
FIELD NAME (* = mandatory)	FIELD CHARACTERISTICS
For Mailed On Behalf Of Customer	Defaulted to the currently selected Mailed On Behalf Of customer numbers. The drop-down list is populated with all of the Mailed On Behalf Of customer numbers that are configured on your desktop application. Select the one whose Cost Centre List you wish to view/modify.
Cost Centre List	A complete list of currently defined Cost Centers for the selected Mailed On Behalf Of customer number.
Cost Centre Name *	The name of the Cost Centre currently highlighted in the Cost Centre List. To add a new Cost Centre, click New, enter the name in this field, and then click Save.

## Command Buttons

### Import

Click this button to import a file of Cost Centre information. The **Open File – Import Cost Centre** window appears, which is a standard Window file location window. Follow the prompts to locate the desired file. Once you have selected a file, an OK/Cancel confirmation pop-up window appears, asking if this is the correct file to import for the displayed CPC Customer Number (i.e. Mailed On Behalf Of Customer Number).

### Delete

Click on a Cost Centre in the list to select it. This button becomes enabled. Click it to remove the Cost Centre. A Yes/No confirmation pop-up window appears.

Note: Once a Cost Centre is associated to a shipment, it cannot be deleted from the list.

### New

To add a Cost Centre to the list, you **MUST** click this button. Focus disappears from the Cost Centre List and the **Cost Centre Name** field is cleared.

**ATTENTION!** DO NOT type over a **Cost Centre Name** in that field. This actually modifies the name of the highlighted Cost Centre.

### Save

This button becomes enabled once you type in the **Cost Centre Name** field (either after clicking **New** or for modification). Click it to save the current **Cost Centre Name**.

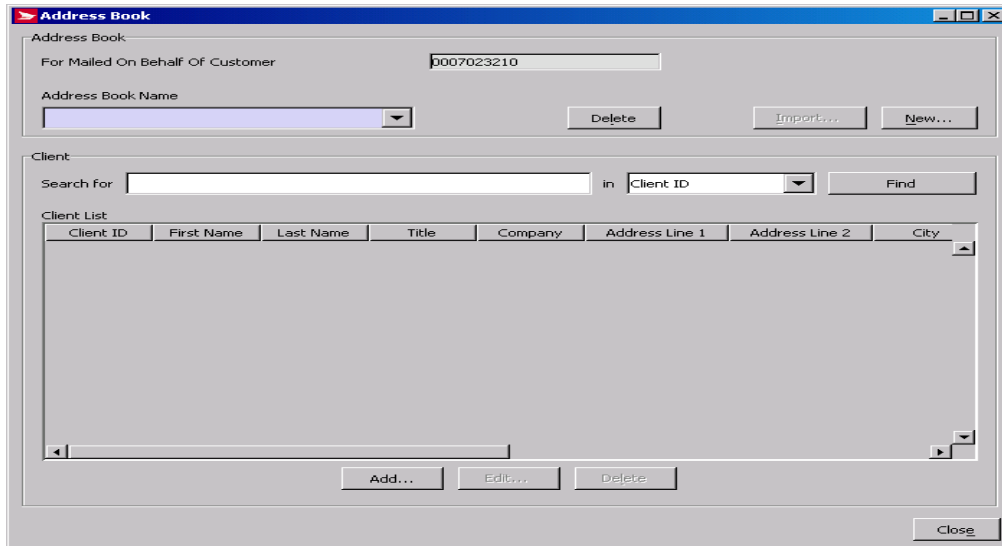
### Close

Click this button to exit the **Cost Centers** window.

## 6.3 Address Book

Select **Address Book** to access the **Address Book** window, where you can create address books, add/delete recipients to/from address books, and edit address book entries.

Access this window by selecting **Address Book** from the **Data Maintenance** menu.



## Overview

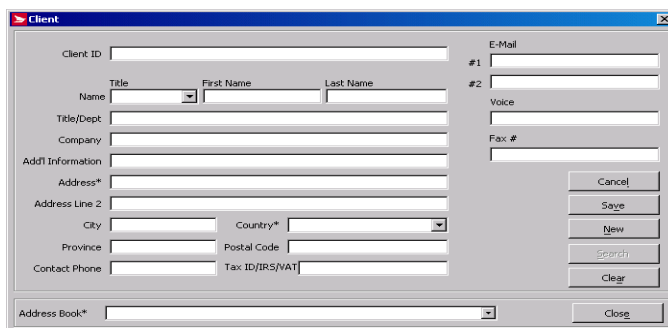
Address Book's functionality allows you to group customers with similar shipping characteristics. Your **Address Book** acts as your main database of addresses, from which you can select addresses to ship to, or create distribution lists for group shipping. Use the **Address Book** window to organize your customers into address books (either all in one address book, or in multiple address books). Also use the **Address Book** window to add, delete, or edit clients in Address Books.

You can import existing address books into Electronic Shipping Tools using the **Import** button on the **Address Book** window.

**ATTENTION!** When you import client information into the application database, **City** initially sorts the records in the **Client List** frame. You can change the sorting criterion by clicking on the desired column heading. However, once any action is taken, such as a deletion or modification, the sorting criterion reverts back to **City**.

The initial focus is on the **Address Book Name** field.

## Client window frame



The following are observations about this window when accessed via the **Address Book** window:

1. When you click the **Add** button on the **Address Book** window, the **Client** window appears with **Cancel**, not **Delete**, as the first command button.
2. When you click **Cancel** on the **Client** window and then click **No**, the **Cancel** button changes to **Delete**.
3. When you click the **Edit** button on the **Address Book** window after selecting a client record, the **Client** window appears with **Delete**, not **Cancel**, as the first command button.

**Format for files:** The import file must be a comma-delimited ASCII flat file where character and non-integer numeric fields are enclosed in double quotes ("). Where no information is available, you need not enter a blank entry (i.e. ""), **EXCEPT if it is the last field**.

You are responsible for providing the proper province, state, and country codes. These fields will be validated by the application during the processing of a shipment.

Click [here](#) if you are reading this guide online to view the Address Book File Structure. If not, please visit the Canada Post website ([www.canadapost.ca](http://www.canadapost.ca)) > Business > select *Electronic Shipping Tools* from the Shipping and Delivery drop-down list > Benefits and Features (at right) > click on Distribution at bottom > Address Book more... > Address Book Import File Specifications.

Below the Address Book File Structure and given samples, click on "one file" to access a document of valid provincial, state, and country codes. If you are reading this guide online, click [here](#).

Address Book	
FIELD NAME (* = mandatory)	FIELD CHARACTERISTICS
For Mailed On Behalf Of Customer	Display-only. Identifies the currently selected Mailed On Behalf Of customer number.
Address Book Name	Use this drop-down list to select from the existing Address Books in the application for the currently selected Mailed On Behalf Of customer number. If the list is blank, no Address Books have been created yet.
Search Fields	Enter the search criterion in the Search for field and select the appropriate column heading in the drop-down list.

## Command Buttons

(Following three buttons are located within the Address Book frame)

**Delete**

Use this button to delete an *entire* Address Book and all of the clients associated with it. Select the desired Address Book from the **Address Book Name** drop-down list and click this button. A Yes/No confirmation pop-up window appears.

**Import**

Click this button to import client information in the form of a file created outside of *Electronic Shipping Tools*. The **Open File – Import Address Book** pop-up window appears, which is a standard Window file location window. It is defaulted to the location of the file of the last successful import. Follow the prompts to locate and import the desired file.

**New**

Click this button to access the **Address Book** pop-up window, where you can enter an **Address Book Name** to create a new, blank Address Book. Click **OK** to create it. The **Address Book Name** field becomes populated with the new name.

(Following four buttons are located within the Client frame)

**Find**

Even though this button is enabled even with no search criterion entered, the Find functionality does not return records with blank entries in the selected column heading. You can search on the following fields: Client ID, First Name, Last Name, Title, Company, Address Line 1, Address Line 2, City, Province/State, Country, Postal/Zip Code, and Phone Number. The Find functionality is not case-sensitive. Select the appropriate column heading from the drop-down list to the left of this button, enter the search criterion, and then click this button. Only those client records that match the search criterion are displayed in the **Client List** frame.

**ATTENTION!** A search on the Client ID, Last Name, and Company fields requires an **exact** match. The other search fields support partial searches.

Note: To list ALL client records again after doing a search, you must reselect the Address Book in the **Address Book Name** field.

**Add**

Click this button to access the **Client** window to add a new client to the currently selected Address Book. If a name has been selected in the **Address Book Name** field, the **Address Book** field on the **Client** window defaults to this name.

**Edit**

Click on a client record in the **Client List** frame to select it and click this button to modify it. The **Client** window appears.

You can also double-click on the client record to access the **Client** window for modification.



Click on a client record in the **Client List** frame to select it and click this button to remove it from the currently selected Address Book. An OK/Cancel confirmation pop-up window appears.

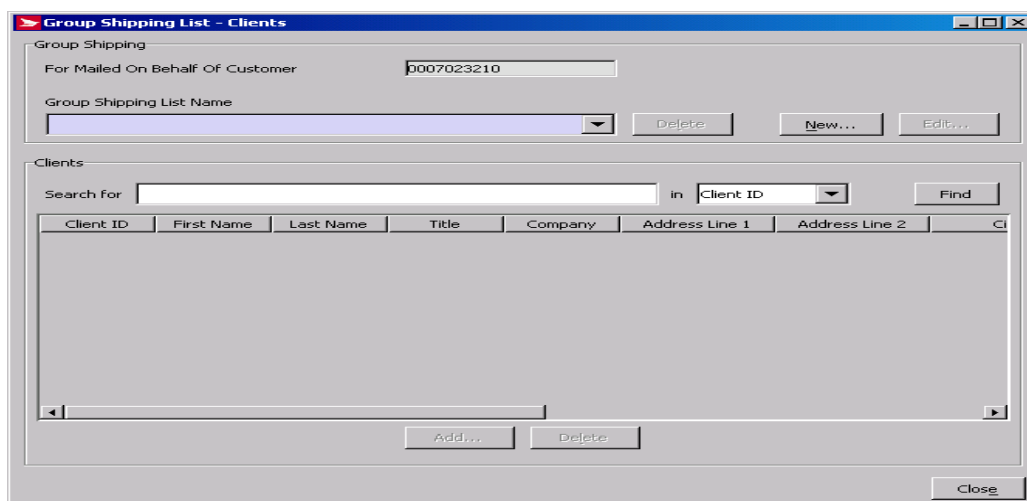
Following button is at bottom right of the window.



Click this button to exit the **Address Book** window.

## 6.4 Group Shipping of Clients

Click on Group Shipping of Clients button to access the Group Shipping List – Clients window, where you create and edit (i.e. add, delete, and modify entries) distribution lists of clients.



### Overview

A **Group Shipping List** allows you to group together customers sharing similar shipping requirements. **Group Shippings** are temporary mailing lists that target specific mailings to a particular group of customers.

Use the **Group Shipping pop-up** window to group customers from different address books and your imported order items into convenient distribution lists, allowing you to send similar shipments to multiple addresses.

The **Group Shipping** function allows you to process shipments very quickly, and saves you valuable processing time.

Note: To use **Group Shipping**, you must be sending **identical** mailings (i.e. mailings that have identical size and weight attributes) to multiple recipients.

**ATTENTION!** Contrary to the **Address Book** window, you cannot use the <CTRL> and <SHIFT> keys to select multiple client records for deletion.

Since there is no **Edit** button on this window, you need to double-click on a client record to access the **Client** window for modification of the record.

**Clients** window frame lists all clients in the currently selected distribution list. Click the headings on the list to sort the list by that category (the selected category is enclosed by asterisks). Double-click an item on the list to view and edit that item.

Group Shipping List - Clients	
FIELD NAME (* = mandatory)	FIELD CHARACTERISTICS
Clients	List of all available Group Shipping Lists of Clients for the current Mailed on Behalf



	of Customer. Note that the Group Shipping Lists of Clients should not be displayed if there are no records assigned to it. One of Clients Group Shipping List or Imported Orders Group Shipping List must be entered for a Group Shipping process. Disabled if an Imported Orders Group Shipping List has been selected.
Imported Orders	List of all available Group Shipping Lists of Imported Orders. Note that the Group Shipping Lists of Imported Orders should not be displayed if there are no records assigned to it. Disabled if a Clients' Group Shipping List has been selected.
Sort By	List of possible sort criteria for the selected type of Group Shipping. The default sort criterion is 'As Created'. In addition to the 'As Created' list value, the list is populated with the list found on the corresponding Group Shipping List window in the Search In drop down list (see P490U 1.2.05 Maintain Group Shipping List). The Sort By drop down list will be empty until a user selects a Client or Imported Orders Group Shipping List. It will be dynamically refreshed when the type of Group Shipping List selected is modified.

## Command Buttons

If a Group Shipping List (Clients or Imported Orders) has been selected:

Starts the processing of the Group Shipping List

When processing Group Shipping Lists of Imported Orders:

That have mutually exclusive options selected, the record should be processed with the first selected option and disregard subsequent options.

Included options should be selected regardless of whether or not the record has these options selected.

Pre-requisite options should be selected regardless of whether or not the record has these options selected.

**Close**

Closes the Group Shipping Pop-up window and returns to the Shipping window, in the state where it was before calling the Group Shipping function

## Add Client to Group Shipping List

**Add**

This button is enabled only when Group Shipping is selected in the **Group Shipping** field.

Access this window by clicking the **Add** button on the **Group Shipping – Clients** window.

Use this window to add client records from Address Books to the Distribution List selected on the **Group Shipping – Clients** window. The initial focus is on the **Address Book** field.

Note: To list ALL records in a selected Address Book, click **Search** with no criterion entered in the **Search Criteria** frame. You can do this even if there is a criterion entered in the **Search for** field of the **Search Results** frame.

You can select multiple client records in the **Search Results** and **Selected Clients** frames. To select a block of successive client records from the list, click on the first record, hold down the <SHIFT> key, and click on the last record. The block becomes highlighted. To select non-adjacent records, hold down the <CTRL> key while you click on the individual records.

## Command Buttons

A rectangular button with a light gray background and a thin black border. The word "Search" is centered in a bold, black, sans-serif font.

The Search functionality works only when an Address Book is selected from the **Address Book** drop-down list. Use this button to list client records in the **Search Results** frame. To list ALL records from that Address Book, do not enter any search criteria and click this button. To filter the initial listing, use the four search fields available: City, Prov/State, Country, and PC/ZIP.

Initially, the **Prov/State** drop-down list is blank. If the **Country** selected is Canada, then the **Prov/State** field becomes populated with an alphabetical listing of the valid provinces and territories. If the **Country** selected is USA, then the **Prov/State** field becomes populated with an alphabetical listing of the valid states. Also, the **PC** field changes to **ZIP**.

Both the **City** and **PC/ZIP** fields support partial searches. However, if you are entering part or all of a Postal Code, it must be in capital letters.

A rectangular button with a light gray background and a thin black border. The word "Find" is centered in a bold, black, sans-serif font.

Once there are client records listed in the **Search Results** frame, use this button to further filter the list. This button is enabled when a search criterion is entered. The Find functionality is not case-sensitive. The available search fields are as follows: Client ID, First Name, Last Name, Title, Company, Address Line 1, Address Line 2, City, Province/State, Country, Postal/Zip Code, and Phone Number.

Note: All the search fields support partial searches. Furthermore, a match is identified if the search criterion is found **anywhere** in the field value. For example, if you enter "n" and select First Name as the search field, all records with "n" anywhere in the First Name (not just as the first letter) are returned.

If there are no matches to the search criterion, all records are cleared from the **Search Results** frame.

A rectangular button with a light gray background and a thin black border. A single right-pointing chevron (>) is centered in a bold, black, sans-serif font.

This button becomes enabled when one or more client records are selected in the **Search Results** frame (use the <CTRL> and <SHIFT> keys to select multiple records). Click it to move the record(s) to the **Selected Clients** frame.

You can also double-click on a client record to move it from the **Search Results** frame to the **Selected Clients** frame.

A rectangular button with a light gray background and a thin black border. A single left-pointing chevron (<) is centered in a bold, black, sans-serif font.

This button becomes enabled when one or more client records are selected in the **Selected Clients** frame (use the <CTRL> and <SHIFT> keys to select multiple records). Click it to move the record(s) to the **Search Results** frame.

You can also double-click on a record to move it from the **Selected Clients** frame to the **Search Results** frame.

A rectangular button with a light gray background and a thin black border. Two right-pointing chevrons (>>) are centered in a bold, black, sans-serif font.

This button becomes enabled when the **Search Results** frame contains client records. Click it to move ALL listed records to the **Selected Clients** frame.

A rectangular button with a light gray background and a thin black border. Two left-pointing chevrons (<<) are centered in a bold, black, sans-serif font.

This button becomes enabled when the **Selected Clients** frame contains client records. Click it to move ALL listed records to the **Search Results** frame.

**Apply**

Click this button to add the client records in the **Selected Clients** frame to the Distribution List. The **Add Client to Group Shipping List** window is automatically closed and you are returned to the **Group Shipping– Clients** window, with the new records appearing in the **Clients** frame.

## 6.5 Group Shipping List of Imported Orders

Select Group Shipping List of **Imported Orders** to access the **Group Shipping List - Imported Order Items** window, where you can create and edit (i.e. add, delete, and modify imported order items) distribution lists.

Access this window by selecting Group Shipping of Imported Orders from the **Data Maintenance** menu.

### Overview

Use this window to prepare a Group Shipping List of Imported Orders. Imported Order Items can be created manually using the **Maintain Imported Order Item** window tabs or imported from external sources using the **Open File – Import Order Items** window.

The **Imported Order Items** frame lists all the Imported Order Items in the Group Shipping List currently selected in the **Group Shipping Name** field.

The initial focus is on the **Group Shipping Name** field.

**ATTENTION!** Contrary to the **Address Book** window, you cannot use the <CTRL> and <SHIFT> keys to select multiple client records for deletion.

Since there is no **Edit** button on this window, you need to double-click on an Imported Order Item record to access the **Maintain Imported Order Item** window for modification of the record.

Note that you cannot create group shipping lists that include both Imported Order Items and Clients.

<b>Group Shipping List - Imported Order Items</b>	
FIELD NAME (* = mandatory)	FIELD CHARACTERISTICS
For Mailed On Behalf Of Customer	Display-only. Identifies the currently selected Mailed On Behalf Of customer number.
Group Shipping Name	Use this drop-down list to select from the existing Imported Orders Group Shipping Lists in the application <i>for the currently selected Mailed On Behalf Of customer number</i> . If the list is blank, no Group Shipping Lists have been created yet.
Search Fields	Enter the search criterion in the Search for field and select the appropriate column

heading in the drop-down list.

## Command Buttons

(Following three buttons are located within the Group Shipping frame)

**Delete**

Use this button to delete an entire Group Shipping, and all of the clients associated with it. Select the desired Group Shipping from the **Group Shipping Name** drop-down list and click this button. A Yes/No confirmation pop-up window appears.

**New**

Click this button to access the **New Group Shipping** pop-up window, where you can enter a **Group Shipping Name** to create a new, blank Group Shipping List. Click **OK** to create it. The **Group Shipping Name** field becomes populated with the new name.

**Edit**

With a Group Shipping List highlighted in the **Group Shipping Name** drop-down list, click this button to change its name.

(Following four buttons are located within the Imported Order Items frame)

**Find**

Even though this button is enabled even with no search criterion entered, the Find functionality does not return records with blank entries in the selected column heading. You can search on the following fields: Order ID/Reference #1, Client ID, First Name, Last Name, Title, Company, Additional Address Info, Address Line 1, Address Line 2, City, Province/State, Postal/Zip Code, Country, Voice Phone Number, Weight, Article (representing Service Type), Length, Width, Height, COD Amount, and Method of Collection. The Find functionality is not case-sensitive. Select the appropriate column heading from the drop-down list to the left of this button, enter the search criterion, and then click this button. Only those client records that match the search criterion are displayed in the **Clients** frame.

**ATTENTION!** A search on the Client ID, Last Name, and Company fields requires an **exact** match. The other search fields support partial searches.

**Add**

This button is enabled only when Group Shipping is selected in the **Group Shipping Name** field.

**Delete**

Click on an Imported Order Item record in the **Imported Order Items** frame to select it and click this button to remove it from the currently selected Distribution List. A Yes/No confirmation pop-up window appears.

(Following button is at bottom right of the window)

**Close**

Click this button to exit the **Imported Orders Group Shipping List** window.

## Add Imported Order Item to Group Shipping List

**Add**

This button is enabled only when Group Shipping is selected in the **Group Shipping Name** field. Access this window by clicking the **Add** button on the **Imported Order Group Shipping List** window.

The screenshot shows a dialog box titled "Add Imported Order Item to Group Shipping List". It contains a "Search Criteria" section with input fields for "City", "Prov/State", "Country", and "Postal Code", and a "Search" button. Below this are two data tables: "Search Results" and "Selected Orders". Both tables have columns for "Imported Or...", "Client ID", "First Name", and "Last Name". Between the tables are four navigation buttons: ">", "<", ">>", and "<<". At the bottom of the dialog are "Apply" and "Cancel" buttons.

### Overview

Use this window to add Imported Order Item records available in the application database to the Group Shipping selected on the **Imported Order Group Shipping List** window.

The initial focus is on the **Address Book** field.

Note: To list ALL records in the application database, click **Search** with no criterion entered in the **Search Criteria** frame. You can do this even if there is a criterion entered in the **Search for** field of the **Search Results** frame.

You can select multiple client records in the **Search Results** and **Selected Orders** frames. To select a block of successive client records from the list, click on the first record, hold down the <SHIFT> key, and click on the last record. The block becomes highlighted. To select non-adjacent records, hold down the <CTRL> key while you click on the individual records.

### Command Buttons

**Search**

Use this button to list Imported Order Item records in the **Search Results** frame. To list ALL records from in the application database, do not enter any search criteria and click this button. To filter the initial listing, use the four search fields available: City, Prov/State, Country, and PC/ZIP.

Initially, the **Prov/State** drop-down list is blank. If the **Country** selected is Canada, then the **Prov/State** field becomes populated with an alphabetical listing of the valid provinces and territories. If the **Country** selected is USA, then the **Prov/State** field becomes populated with an alphabetical listing of the valid states. Also, the **PC** field changes to **ZIP**.

Both the **City** and **PC/ZIP** fields support partial searches. However, if you are entering part or all of a Postal Code, it must be in capital letters.

**Find**

Once there are client records listed in the **Search Results** frame, use this button to further filter the list. This button is enabled when a search criterion is entered. The Find functionality is not case-sensitive. The available search fields are as follows Order ID/Reference #1, Client ID, First Name, Last Name, Title, Company, Additional Address Info, Address Line 1, Address Line 2, City, Province/State, Postal/Zip Code, Country, Voice Phone Number, Weight, Enhanced Record Indicator, Article (representing Service Type), Length, Width, Height, Document Indicator, Delivery Confirmation Indicator, Oversize Indicator, Signature Indicator, US Postal Box Indicator, Do Not Safe Drop Indicator, Card for Pickup Indicator, Proof of Age Required (18) Indicator, Proof of Age Required (19) Indicator, Leave at Door Indicator, Registered Indicator, Special Delivery Indicator, Advice of Receipt Indicator, Prepaid Indicator, Insured Amount, COD Amount, Method of Collection, Scheduled Delivery Instructions (English), and Scheduled Delivery Instructions (French).

Note: All the search fields support partial searches. Furthermore, a match is identified if the search criterion is found **anywhere** in the field value. For example, if you enter “n” and select First Name as the search field, all records with “n” anywhere in the First Name (not just as the first letter) are returned.

If there are no matches to the search criterion, all records are cleared from the **Search Results** frame.



This button becomes enabled when one or more Imported Order Item records are selected in the **Search Results** frame (use the <CTRL> and <SHIFT> keys to select multiple records). Click it to move the record(s) to the **Selected Orders** frame. You can also double-click on an Imported Order Item record to move it from the **Search Results** frame to the **Selected Orders** frame.



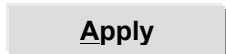
This button becomes enabled when one or more Imported Order Item records are selected in the **Selected Orders** frame (use the <CTRL> and <SHIFT> keys to select multiple records). Click it to move the record(s) to the **Search Results** frame. You can also double-click on a record to move it from the **Selected Orders** frame to the **Search Results** frame.



This button becomes enabled when the **Search Results** frame contains Imported Order Item records. Click it to move ALL listed records to the **Selected Orders** frame.



This button becomes enabled when the **Selected Orders** frame contains Imported Order Item records. Click it to move ALL listed records to the **Search Results** frame.



Click this button to add the Imported Order Item records in the **Selected Orders** frame to the Group Shipping. The **Add Imported Order Item to Distribution List** window is automatically closed and you are returned to **Imported Orders Group Shipping** window, with the new records appearing in the **Imported Order Items** frame.

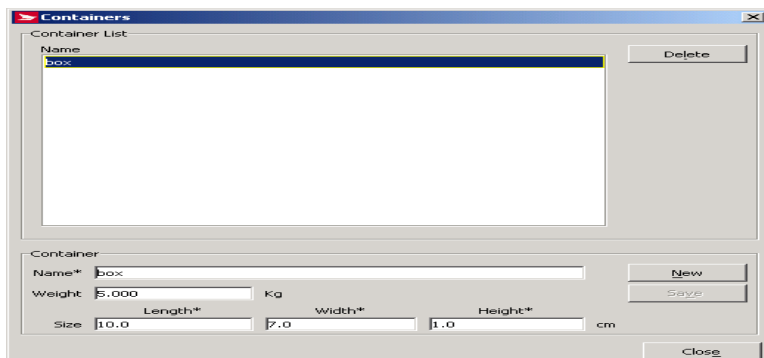


Click this button to exit the **Add Imported Order Item** to the Group Shipping window. If there are Imported Order Item records in the **Selected Orders** frame, a Yes/No confirmation pop-up window appears, asking you if you want to save your changes. If you click **Yes**, these records are added to the Group Shipping, and the **Add Imported Order Item** to Group Shipping window is automatically closed, returning you to the **Imported Orders Group Shipping List** window. If there are no selected Imported Order Item records, then you just exit the window.

## 6.6 Containers

Select **Containers** to access the **Containers** window, where you can predefine container sizes and weights.

Access this window by selecting **Containers** from the **Data Maintenance** menu or from the **Ship To** section of the shipping page.



## Overview

To ease the periodic shipping of same type of package, use the **Containers** window to predefine the dimensions of your package.

Use the **Containers** window to add a new shipping container type to the **Container List**, remove existing containers, or modify the properties of existing containers.

Once the **Container** profile is created, all you have to do is select it in the **Size & Weight** frame of the **Ship** tab of the **Shipping** window to populate the weight and size fields. This function can save you valuable time, avoid duplicate data entry and help ensure parcels get properly rated according to their size and weight.

## Command and Navigation Control Definitions

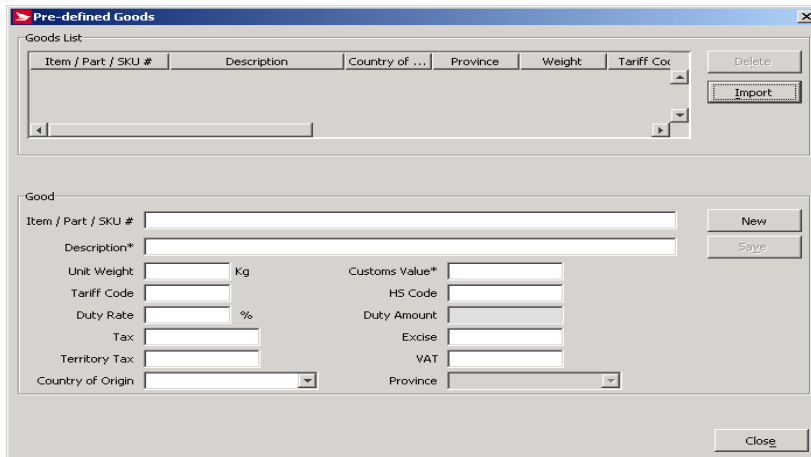
The following table describes the fields and Command Button

<b>Containers</b>	
COMMAND BUTTON OR MENU ITEM	RESULT OF INVOCATION
Container List	A complete list of currently defined containers, indicating the name and dimensions. To modify the information for any container on the list, highlight the container, modify the appropriate fields, then click the Save button.
Delete	Click Delete to delete the container currently selected on the Container List. You will be prompted to confirm the deletion.
Name*	The name of the currently selected container (or blank, if no container is currently selected or you are adding a new container). To change or add a name, modify this field, then click the Save button.
Weight	The weight of the currently selected container (or 0, if no container is currently selected or you are adding a new one). The units of measure for this dimension are set using the Options tab of the Site Information window. To change or add a weight, modify this field, then click the Save button.
Length*	The length of the currently selected container (or 0, if no container is currently selected or you are adding a new one). The units of measure for this dimension are set using the Options tab of the Site Information window. To change or add a length, modify this field, then click the Save button.
Width*	The width of the currently selected container (or 0, if no container is currently selected or you are adding a new one). The units of measure for this dimension are set using the Options tab of the Site Information window. To change or add a width, modify this field, then click the Save button.
Height*	The height of the currently selected container (or 0, if no container is currently selected or you are adding a new one). The units of measure for this dimension are set using the Options tab of the Site Information window. To change or add a height, modify this field, then click the Save button.
Cancel	Clears the fields and/or changes nothing
Save	Click Save to save your changes to the Electronic Shipping Tools database.
Close	Click this button when you are done on this window.

## 6.7 Pre-defined Goods

Select **Pre-defined Goods** to access the **Pre-defined Goods** window, where you can create predefined records of commonly shipped items so that you can quickly build a detailed description list of a shipment for customs purposes.

Access this window by selecting Pre-defined Goods from the **Data Maintenance** menu.



## Overview

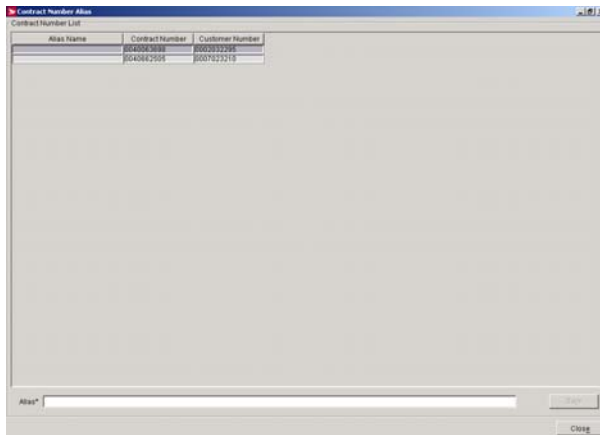
The **Pre-defined Goods** window is used to create pre-defined records of commonly shipped items. Each record describes a single item that can be included in a shipment.

When you create a detailed description of a shipment for customs purposes, you can quickly build a list by selecting from these pre-defined items. Most fields are optional, and later you can edit the value of any field after it has been included in the shipment.

To simplify the completion of **Customs** information, select from the drop-down list the description of goods that have been pre-defined using the **Pre-defined Goods** window

## 6.8 Contract Number Alias

Access this window by selecting **Contract Number Alias** from the **Data Maintenance** menu.



## Overview

Use the **Contract Number Alias** window to associate an alias or alternate name to an existing contract. Using an alias name can make contract type identification easier during shipping. This feature is especially useful when multiple people are accessing multiple contracts on the system, such as in a mailroom scenario.

Select the **Contract Number Alias** you created from the **Contract** drop down list in the **Charge To** section of the **Shipping** window.

The **Alias Name** is associated with the **Contract Number**. The **Contract Number List** details all currently defined contract numbers for the selected **Customer Number**. As each number is highlighted, the associated alias is displayed in the **Alias Name** field, if an alias has been defined. If an alias has not been defined, the **Alias Name** field is blank.

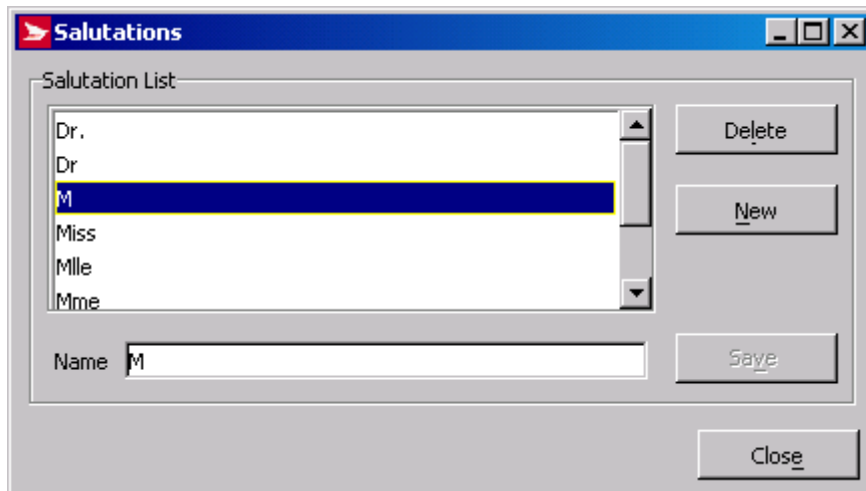
To enter an alias, key the alias into the **Alias** field, then click **Save**.



<b>Contract Number Alias</b>	
COMMAND BUTTON OR MENU ITEM	RESULT OF INVOCATION
Contract Number Field	This list details all currently defined contract numbers for the selected CPC Customer #. As each number is highlighted, the associated alias is displayed in the Alias field, if an alias has been defined. If an alias has not been defined, the Alias field is blank.
Alias Name	This field displays the alias defined for the currently selected contract number. If no alias has been defined, this field is blank. To define an alias, enter it in this field.
Contract Number	List of all Contracts available to all Behalf of Customer Partners of the current Mailed By Customer.
Customer Number	Behalf of Customer Number associated to the Contract.
Alias*	Enter the user defined alias in this field
Save	Click Save to save your changes to the Electronic Shipping Tools database.
Close	Click this button to close this window.

## 6.9 Salutations

Access this window by selecting **Salutations** from the **Data Maintenance** menu.



### Overview

A salutation is the title we use to address an individual, for example, Mr., Mrs., Dr., Ms, etc. Use the **Salutations** window to view all of the salutations currently available on the system. You can also create new salutations, or delete or modify existing salutations.

The titles maintained in the **Salutations** window populate the drop-down list in the **Ship To** section of the **Shipping** window. These salutations also populate the **Title** drop-down list in the **Client** window where client profiles are maintained and associated to an address book.

Selecting **Titles** from a drop-down list makes shipping faster and ensures consistency for addressing standards.

<b>Salutations</b>	
<b>COMMAND BUTTON OR MENU ITEM</b>	<b>RESULT OF INVOCATION</b>
Salutation List	A complete, alphabetical list of currently defined salutations by name. To modify the information for any salutation on the list, highlight the salutation, modify the Name field, then click Save. To add a new salutation, click New.
Delete	Highlight a salutation on the Salutation List, then click Delete to delete it. You will be prompted to confirm the deletion.
New	To add a new salutation, click New. Then, enter the name of the new salutation in the Name field and click Save.
Name	The name of the currently highlighted salutation. For a new salutation, this field will be blank. Click New, enter the name of the new salutation, then click Save.
Save	After any modification to the Name field (either the addition of a new name or the modification of an existing name), click Save to save your changes.
Close	Click this button when you are done on this window.

## 6.10 Site Information

The Site Information window has four tabs: Machine Location, Outlets/Deposit Locations, Customers, and Options. Much of the information in this window is pre-filled during set-up, or when the system downloads information from Canada Post.

The Site Information window allows you:

- To modify profile and/or configuration information of an existing Customers Site;
- To maintain Machine Location Information;
- To maintain Induction Point information;
- To maintain a list of CPC Customer Information;
- To maintain Site Options; and

Access this window by selecting **Site Information** from the **Data Maintenance** menu.

### Machine Location Tab

This tab will initially be populated using Canada Post information for the main CPC Customer. All subsequent changes will be managed locally. The initial focus is on the **Company** field.

The screenshot shows the 'Site Information' window with the 'Machine Location' tab selected. The form contains the following data:

- Site: 42085
- Customer Owner: 0007023210
- Company\*: PROCIMPR, CUST DO NOT USE-005
- Contact: (empty)
- Address\*: 502 MAIN ST N
- Address Line 2: (empty)
- City\*: MOOSE JAW
- Country\*: Canada
- Province\*: Saskatchewan
- Postal Code\*: S6H 3K3
- E-Mail: (empty)
- Phone (voice/FAX)\*: 123-456-7930

At the bottom of the window, there are buttons for 'Shipping Preferences', 'Printer Configuration', 'Output Configuration', 'Barcode Ranges', 'Save', and 'Close'.

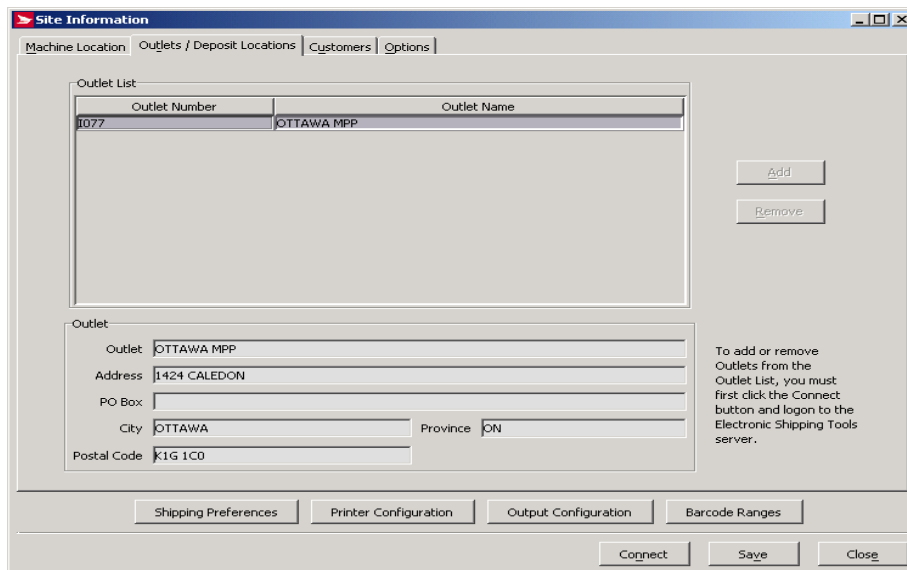
## Overview

The Site Information – **Machine Location** tab is used to record information about the physical address of the system. The address set up in the screen is used as the default return address on the manifest and label output.

<b>Machine Location Tab</b>	
FIELD NAME (* = mandatory)	FIELD CHARACTERISTICS
Site	This numeric field is display-only and cannot be altered by the user. It is a unique, Canada Post-assigned number to identify the <i>Electronic Shipping Tools</i> site.
Customer Owner	This numeric field is the Mailed By Customer number, which is the Canada Post-assigned customer number of the customer that is preparing the mailing. It is the customer number associated with the login User ID. It is display-only and cannot be altered by the user.
Company *	Enter your company name as it appears on your contract with CPC.
Contact	Enter the name of the primary contact person in your organization for CPC contracting issues.
Address *	Enter the street address of your organization as it appears on your contract with CPC.
Address Line 2	Use this line if you need more space for the street address.
City *	Enter the city or municipality in which your organization resides.
Country *	From the drop-down list, select the country in which your organization resides (either Canada or USA).
Province/State *	If the Country is Canada, the field is Province and it displays an alphabetical listing of the valid provinces and territories. If the Country is USA, the field is State and it displays an alphabetical listing of the valid states. Select the province or state in which your country resides.
PC/ZIP *	If the Country is Canada, the field's label is PC. If the Country is USA, the field's label is ZIP. Enter the Postal Code or ZIP Code of your organization as it appears on your contract with CPC.
E-Mail	Enter the e-mail address of the primary contact person at your organization for CPC contracting issues.
Phone (voice/FAX) *	Enter the telephone number (in the left field) and/or fax number (in the right field) of the primary contact person at your organization for CPC contracting issues.
Save	Click the Save button to initiate the save process
Close	Click the close button to exit this window

## Outlets/Deposit Locations Tab

Access this window by selecting **Site Information** from the **Data Maintenance** menu.



The screenshot shows the 'Site Information' window with the 'Outlets / Deposit Locations' tab selected. It features a table with the following data:

Outlet Number	Outlet Name
1077	OTTAWA MPP

Below the table, there are input fields for an 'Outlet' with the following values:

- Outlet: OTTAWA MPP
- Address: 1424 CALEDON
- PO Box: (empty)
- City: OTTAWA
- Province: ON
- Postal Code: K1G 1C0

At the bottom of the window, there are several buttons: 'Shipping Preferences', 'Printer Configuration', 'Output Configuration', 'Barcode Ranges', 'Connect', 'Save', and 'Close'. A note on the right side of the window reads: 'To add or remove Outlets from the Outlet List, you must first click the Connect button and logon to the Electronic Shipping Tools server.'

## Overview

The Site Information – **Induction Point** tab is used to record information about the Electronic Shipping Tools user.

To add or remove **Outlets** from the **Outlet List**, you must first click the **Connect** button and logon to the *Electronic Shipping Tools* server (if you have not already logged on). If your local version of the application requires software or data updates, then you must initiate the software/data update process. Only once the local version of the *Electronic Shipping Tools* application is up-to-date can the addition or removal of **Outlets** be processed.

The **Add** button enables you to select an outlet from which to induct your mail. Rating and services standards are based on the induction point selected in this window.

The **Remove** button enables you to de-select an outlet.

You may set up two default induction points: one for Shipping and Delivery Services and another for Communication services.

Induction Point Tab	
COMMAND BUTTON OR MENU ITEM	RESULT OF INVOCATION
Information Window	This window displays basic information about CPC induction points. Select one to see more detailed information in the fields below.
Outlet List	A unique, Canada Post Corporation name for the Outlets/Deposit locations used by the site. You cannot change this field.
Outlet	Display-only. The postal facility where the mail is brought for induction into CPC's mail stream. Both the Outlet Number and Outlet Name are displayed in the Outlet List.
Address	Display-only. The street address of the postal facility where the mail is brought for induction into CPC's mail stream.
PO Box	Display-only. The post office box of the postal facility where the mail is brought for induction into CPC's mail stream.
City	Display-only. The city of the postal facility where the mail is brought for induction into CPC's mail stream.
Province	Display-only. The province of the postal facility where the mail is brought for induction into CPC's mail stream.
Postal Code	Display-only. The postal code of the postal facility where the mail is brought for induction into CPC's mail stream.
<u>A</u> dd	Enables you to select an outlet from which to induct your mail. Rating and Services standards are based on the induction point selected in this window.
Remove	Enables you to de-select an outlet.
<u>C</u> onnect	Initiates the Logon process.
<u>S</u> ave	Click the Save button to initiate the save process
<u>C</u> lose	Click the Close button to exit this window

## Customers Tab

Access this window by selecting **Site Information** from the **Data Maintenance** menu.

Site Information

Machine Location | Outlets / Deposit Locations | Customers | Options

Mailed By Customer Number: 0007023210      Mailed By Contract Number: 0040662505

Customer Number to be added to Mailed on Behalf of Customer List:

Contract Number:

Add

To add or remove Customers from the Mailed on Behalf of Customer List, you must first click the Connect button and logon to the Electronic Shipping Tools server.

Customer Number	Customer Name	Contract
0007023210	PROCIMPR CUST DO NOT USE-005	0040662505

Remove

Shipping Preferences    Printer Configuration    Output Configuration    Barcode Ranges

Connect    Save    Close

## Overview

The Site Information – **Customers** tab is used to list all the Mailed on Behalf of partners and partner's contracts that have been set-up on the Electronic Shipping Tools.

This tab also enables the user to add or remove **Customer Numbers** to the **Mailed on Behalf of Customer List**.

To add or remove **Customer Numbers** to/from the **Mailed On Behalf Of Customer List**, you must first click the **Connect** button and logon to the *Electronic Shipping Tools* server (if you have not already logged on). If your local version of the application requires software or data updates, then you must initiate the software/data update process. Only once the local version of the *Electronic Shipping Tools* application is up-to-date can the addition or removal of **Mailed on Behalf of Customers** be processed.

Customers Tab	
FIELD NAME (* = mandatory)	FIELD CHARACTERISTICS
Mailed By Customer Number	This numeric field is display-only and cannot be altered by the user. It identifies the Canada Post-assigned customer number of the customer that is preparing the mailing. It is the customer number associated with the login User ID.
Mailed By Contract Number	This numeric field is display-only and cannot be altered by the user. It identifies the number of the contract that the Mailed By Customer has with CPC.
Customer Number (to be added to Mailed On Behalf Of Customer List)	Enter the Mailed On Behalf Of Customer Number that you want to add to the application.
Contract Number	Enter the contract number of the Mailed On Behalf Of Customer Number to be added.
Add	Enables you to enter Customer Numbers to Mailed on Behalf Of Customer List
Remove	Enabled after you have clicked on the Connect button and successfully logged on to the Electronic Shipping Tools server; Removes the Customer Number from the Mailed on Behalf of Customer List.
Connect	Initiates the Logon process.
Save	If you select "Yes", then continues with the save process. If you select "No", the Save process is cancelled.
Close	Verifies if you have made changes to data. If you select "Yes", then you are prompted to save data prior to the window closing. If you select "No", the window is closed.

## Options Tab

Access this window by selecting **Site Information** from the **Data Maintenance** menu.

## Overview

The Site Information – **Options** tab allows you to maintain global settings which control added functionality for the application. This tab allows you to specify **Options**, **System Preferences** and **Services Used**.

The checkboxes in the **Options** frame on this tab allows you to maintain global settings, which control added functionality for the application as follows:

Options Tab	
FIELD NAME (* = mandatory)	FIELD CHARACTERISTICS
<b>Options</b>	
Language	Select your preferred language from the drop-down list (English or French). This choice will affect the default language of display for all <i>Electronic Shipping Tools</i> menus, screens, and messages. This language choice can be overridden by language choices made on the User Profile window, if security is enabled.
Security Enabled	This option allows you to control access to the application. Check it to use sign-in and sign-out security at the site.
Inbound Freight	Display-only. This option is automatically checked by the system when a shipper is physically located in the US but inducts their mail in Canada. The shipper's country is set in the Machine Location tab. You cannot change the value of this field.
Automatically Initiate Printing of Unaddressed Admail Labels	Check this option to automatically print labels for Unaddressed Admail. This is for Communications Services only.
Automatically initiate printing of Unaddressed Admail Container Labels	Check this option to automatically print container labels for Unaddressed Admail.
Enable PDF Format Printing	Check this option to improve report, manifest, and label printing by loading a full version of the Adobe Acrobat Reader application.
<b>Services Used</b>	
Communication	Select this option if you want your desktop application to be configured to process Communications Services.
Distribution	Select this option if you want your desktop application to be configured to process Shipping and Delivery Services.
Connect	Initiates the Logon process.
Save	If you select "Yes", then continues with the save process. If you select "No", the Save process is cancelled.
Close	Verifies if you have made changes to data. If you select "Yes", then you are prompted to save data prior to the window closing. If you select "No", the window is closed.

To modify the **Services Used**, you must first click on the **Connect** button and then logon to the Electronic Shipping Tools server (if you're not currently logged on). Note that if your local version of the Electronic Shipping Tools application requires software or data updates, then you must initiate the software/data update process. Only once the local version of the Electronic Shipping Tools application is up-to-date can the addition or removal of **Services Used** be processed.

## Command Buttons

### Shipping Preferences

Access this window by either by clicking on the **Shipping Preferences** command button from the **Site Information** screen from the Data Maintenance Menu on the Desktop Window, or selecting the Shipping Preference menu on the Shipping Window.

The Shipping Preferences window allows you to establish default settings for the application.

This window is divided into four tabs: [Shipping](#), [Shipping Options](#), [Customs](#), and [Return Parcel Data](#).

**ATTENTION!** Be sure to have the appropriate **Mailed On Behalf Of** customer number selected in the **Default Settings for Mailed On Behalf Of** field. This field does NOT default to the currently selected **Mailed On Behalf Of** customer number.

### Shipping Tab

Most of the following default settings affect the **Ship To section** of the **Shipping** window

This illustration highlights the features of the **Shipping** tab.

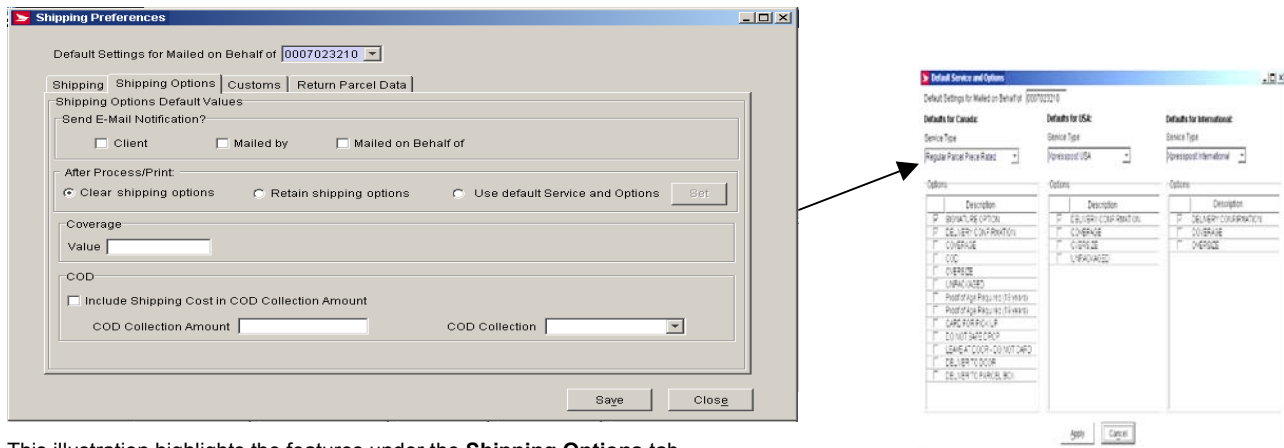
<b>Shipping Tab</b>	
<b>FIELD NAME (* = mandatory)</b>	<b>FIELD CHARACTERISTICS</b>
<b>Shipping Items Default Values</b>	
Default Settings Mailed on Behalf Of	Displays the Customer Number for which the mailing is being done
Open Shipping Window on Startup	Check this option to have the Shipping window automatically open when you enter the application.
Prompt for Imported Order ID	Check this option if you want an Imported Order ID supplied for every shipping transaction. The prompt appears when you click the Process/Print button.
Clear Shipping Data after Process/Print	Check this option if you want the application to automatically clear the data entered in the Ship To and Size & Weight frames of the Ship tab (Shipping window) after processing a transaction.
Cost Centre Required	Note that the Cost Centre value and checkbox selections, if any, remain as is. Check this option to automatically include the cost centre to your shipping items
Print USA/Intl Address Label	Check this option to automatically print address labels for USA and International shipments.
Additional Address Information required	Check this option to automatically include additional address information to your shipping items
Print Quickship Address Label	Check this option to automatically print a label 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.
Print Postage Rate on International Labels	Check this option if you want the postage rate displayed on the labels
Print Insured Value on USA / Intl Labels*	Check this option if you want the insured value displayed on the labels
<b>Active Field after Process/Print</b>	
Regular Shipment	The system default is the Client ID field (i.e. after processing a regular transaction, the cursor is set in this field). You can change this default to Imported Order ID, Last Name, or Company Name.
Quickship Shipment	The system default is the Country field (i.e. after processing a transaction using Quickship information only, the cursor is set in this field). You can change this default to Postal Code.
Measurement Units	The system default for the preferred measurement unit is Metric. You can change this default to Imperial.
Cost Centre	You can select a cost centre from the drop-down list to be automatically

	associated with a shipment.
No. of Pieces	You can change the system default of "1" to a value not exceeding "999".
Container	You can select a predefined container from the drop-down list to be automatically included in a shipment.
Item Reference #2	You can enter a second reference number to help you manage your shipping process
Use Cost Centre as Reference #2	Select this option to identify the Cost Centre as the second reference number
<b>Item Identifier</b>	
Use System-Generated ID's	Select this option to have the application automatically generate an identifier (i.e. barcode) for shipments with delivery confirmation selected.
Manually Scan/Type ID's	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.
<b>Manifest Address</b>	
**Use Site Address	Select this option to have Site address to appear on shipping labels
**Use Customer's Address	Select this option to have Customer's address to appear on shipping labels
<b>Address Label Return Address</b>	
**Use Site Address	Select this option to have Site address appear on return address labels
**Use Customer's Address	Select this option to have Customer's address appear on return address labels
Save	Saves your information
Close	Click this button when you are done on this window.

\*\*You may select these default values to be printed on the manifest and/or return label.

## Shipping Options Tab

The following default settings affect the Ship To, and **Service** and Options sections of the **Shipping** window.



This illustration highlights the features under the **Shipping Options** tab.

- **Shipping Options Tab:** This page allows you to select default values for your shipping options. For instance, the new **Set** command button allows you to select default values for options on shipments to Canada, the U.S. and international destinations

Shipping Options Tab	
FIELD NAME (* = mandatory)	FIELD CHARACTERISTICS
<b>Send E-Mail Notification?</b>	
Client	Check this option to send an E-Mail notification to the client
Mailed By	Check this option to send an E-Mail notification to the customer identified by the Mailed By number
Mailed on Behalf Of	Check this option to send an E-Mail notification to the customer identified by Mailed On Behalf Of number
<b>After Process/Print</b>	
Clear Shipping Options	Check this option to clear the service options selected for a Service Type between shipments per workstation.
Retain Shipping Options	Check 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.



Use default Service & Options - <b>Set</b>	Check this option to use the service options selected for a Service Type between shipments per workstation
<b>Coverage</b>	
Value	You can enter a value to be the default amount if the Coverage service option is selected.
<b>COD</b>	
Include Shipping Cost in COD Collection Amount	Check this option which will includes the Shipping Cost to the COD amount to collect.
COD Collection Amount	You can enter a value to be the default amount if the COD service option is selected.
COD Method of Collection	You can select from the drop-down list a default method if the COD service option is selected.

## Customs Tab

The following default settings affect the **Customs** tab.

<b>Customs Tab</b>	
FIELD NAME (* = mandatory)	FIELD CHARACTERISTICS
Always print Customs document	Check this option to print Customs documents for every order
Retain Customs Data	Check 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 was chosen for the previous transaction for a particular Country (Canada, USA, or International). Once you change this Service Type, however, the customs data is permanently cleared (i.e. you cannot retrieve it by reselecting the Service Type).
Reference Number	You can enter a reference number to be automatically associated to a shipment.
CAD to USD	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.
Currency	You can enter a currency (e.g. CAD, USD) to be automatically used for a shipment.
Duty and Tax	You can enter the value of the calculated Duty rate plus the tax that applies to the item.
Value	You can 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	You can 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 •Gift •Commercial sample •Repair/Warranty •Trade show exhibit •Document •Other	You can select a reason for export from the drop-down list to be automatically used for a shipment.
Non Delivery Instructions	You can 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.

## Return Parcel Data Tab

This illustration highlights the features found under the **Return Parcel Data** tab.

**Return Parcel Tab:** This page allows you to select default values for use when a parcel is returned to you; it is related to the **Print Return Label** checkbox on the shipping page. This new page allows you to enter information that will be printed on the labels of designated returned parcels. You can also specify which type of service you wish to be used for the return, and an e-mail address for notification of a return. Once you click **Save** on this page, the information you have entered will appear on the return label if you choose to print one.

You also have the ability to create return address labels to [Group Shipping](#). Enter the data that will be used to create the return label on the Return Parcel Data tab.

This tab allows you to select various default settings:

- **Print Return Label** checkbox
- **Use the Site Return Address for this Mailed on Behalf of Customer**
- **Ship To** fields
- **Return Parcel e-mail Notification** field
- **Service Type** (Domestic service only)
- **Always Use this Data for Return Parcels** checkbox

If you have checked the Print Return Label checkbox, the Return Label Information page is displayed when you click on the Process/Print button unless you have previously selected **Always Use this Data for Return Parcels** at the Default settings page. Once you have selected the Process/Print button, the original label is printed, followed by the Return Address label.

The cost information displayed on the Shipping page does not include the cost of returning the parcel. This cost will be calculated when the parcel is mailed as a return and displayed on a separate line on your invoice.

Please Note: The Reports page now includes the new Returns report containing information on returned parcels based on the manifest number.

The return labels option is disabled when you are working in Quickship mode.

<b>Return Parcel Data Tab</b>	
FIELD NAME (* = mandatory)	FIELD CHARACTERISTICS
Print Return Label	Select this option if you want to print the Return Label
Use the Address Label Return Address	Select this option if you want the Return Address to be printed on your return label
Use this Return Address	The information you enter in this section will be used on the return address label
Service Type	Select service type from the drop down list
E-Mail Notification?	Enter the email address(s) to be used to send an E-Mail notification
Always use this data for Return Parcels (Do not prompt during Process/Print)	Select this option if you always want to use this data for your Return Parcel labels
Save	If you select "Yes", then continues with the save process. If you select "No", the Save process is cancelled.
Close	Click this button when you are done on this window.

## Printer Configuration

Please click [here](#) for further details

## Output Configuration

Please click [here](#) for further details

## Barcode Ranges

Please click [here](#) for further details

## 6.11 Customer

The **Customer** window is where you identify your **Mailed On Behalf Of** customers to *Electronic Shipping Tools*.

Access this window by selecting **Customer** from the **Data Maintenance** menu.

Customer Number: 0007023210

Customer

Cust Name\*: PROCIMPR CUST DO NOT USE-005

Contact\*:

Address\*: 502 MAIN ST N

Address Line 2:

City\*: MOOSE JAW Country: Canada

Province\*: Saskatchewan Postal Code\*: S6H 3K3

Phone\*: 123-456-7930 E-Mail:

Pref. MOP\*:

GST Exemption: 1

Save Cancel Close

### Overview

Use the **Customer** window to identify yourself to Electronic Shipping Tools. This window is completed during initial set-up of Electronic Shipping Tools. Use the **Customer** window to maintain your default settings.

The information in the **Customer** window overrides the information on the **Machine Location** tab of the **Site Information** window for the options selected in these checkboxes.

## 6.12 Client

The **Client** window is where you can add and edit recipients.

Access this window by selecting **Client** from the **Data Maintenance** menu.

## Overview

Each Client entered in Electronic Shipping Tools has a profile that includes address and contact information, as well as the address book to which he/she belongs. Use the Client window to add a new Client and profile, or to edit an existing Client profile.

The Client window is often used to leverage order taking in warehouse facilities.

Select the Client record to populate the Ship tab of the Shipping window to expedite the shipping process and avoid duplicate data entry.

Use the Search button to retrieve specific Client records. Enter search criteria in any or all of the Client ID, Last Name, and Company fields, and then click Search. If these fields are left blank, all Clients are returned. If more than one Client matches the criteria entered, a list is presented in the Select Client window; select the appropriate Client from the list and click OK.

The E-Mail field on the Client window captures the e-mail address for the Client. This e-Mail address is the destination of a Shipment Notification to the Client when the Send e-Mail Notification checkbox is selected on the Service tab of the Shipping window.

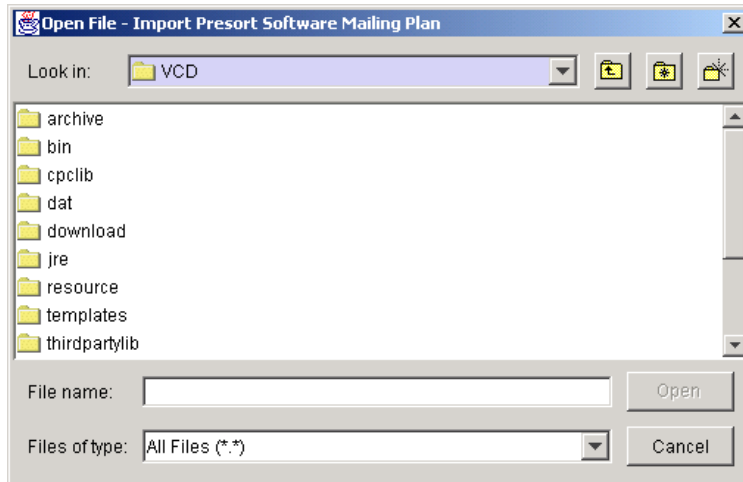
Each Client must be stored in an address book, but can be stored in only one address book.

Client IDs are numbers you assign to each of your clients. They are optional, and can be used for any purpose you see fit, from simple organization to mapping the customer back to your own customer records in a meaningful way. Client ID numbers are added on the Client window.

## 6.13 Import Presort Software Mailing Plan

The Import Presort Software Mailing Plan window is used to import software mailing plans from an outside file.

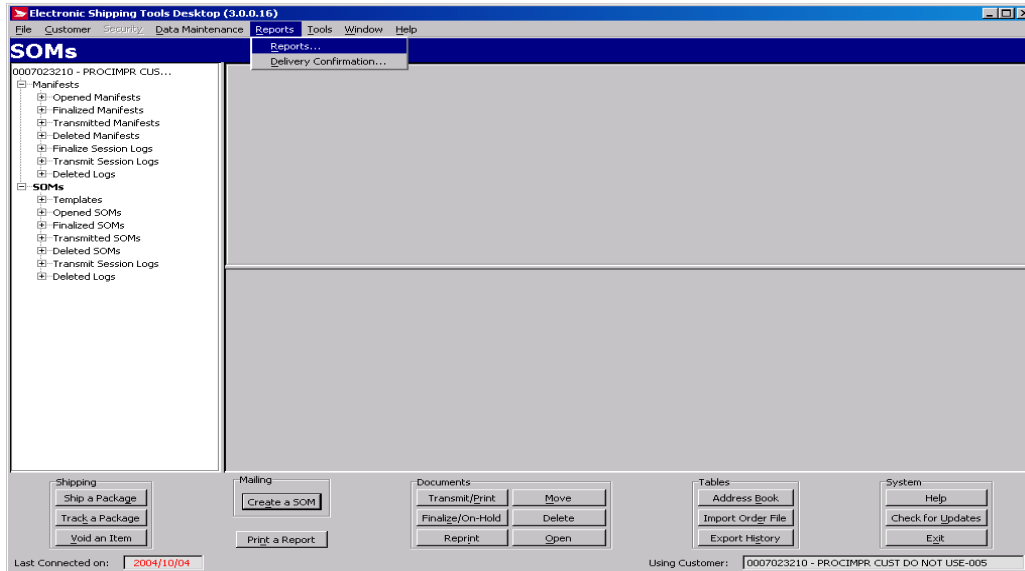
**Note:** The Client Option refers to Shipping and Delivery Services. For more information on its functions, please refer to the Shipping and Delivery Services User Guide.



## 6.14 Import Template

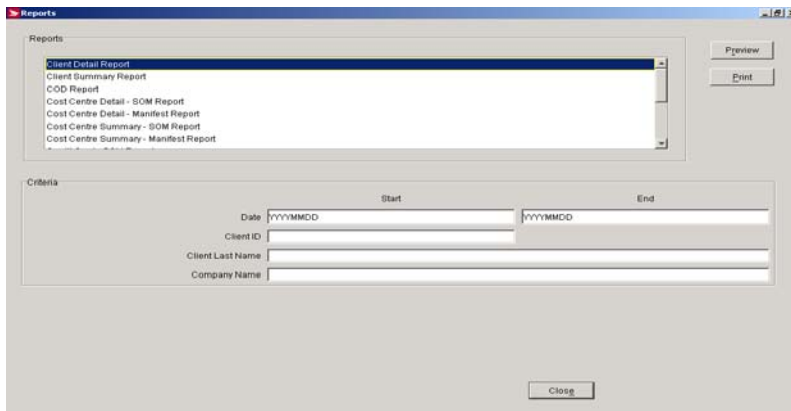
The Import Template functionality is available on the Desktop version under the *Data Maintenance* menu header for **Unaddressed Admail only**. For more information on its functions, please refer to the Unaddressed Admail User Guide.

# 7.0 Reports Menu



## 7.1 Reports

Access this window by selecting **Reports** from the **Reports** menu.



### Overview

Reports provide you with reconciliation tools to manage your shipping business.

The Electronic Shipping Tools reporting function allows you to produce and print many types of reports (detailed in the list below). Use the **Reports** window to select the report desired, enter the **Criteria**, then preview and print the resulting report.

To generate a report:

1. Select the report type from the **Reports** frame.
2. Enter the criteria in the **Criteria** frame. Criteria differ depending on the report selected.
3. Click **Preview** to preview the report before printing.
4. Click **Print** to print the report.

<b>Reports</b>	
<b>COMMAND OR MENU ITEM</b>	<b>RESULT OF INVOCATION</b>
Date Range	Enter a Start date and an End date. The resulting report will include only shipments that occurred within the specified date range.
Client Information	Enter Client ID, Last Name, and Company Name
Preview	Click Preview to view an on-screen preview of your report prior to printing.
Print	Click Print to print all of the messages displayed on the Communications Status screen.
Close	Click this button when you are done on this window.

## Report Names, Descriptions and Criteria Overview

**Client Detail Report** lists the line items shipped to a specific customer. Report criteria include date range, client ID, and client/company name.

**Client Summary Report** lists the total items shipped to a specific customer, summarized by service. Report criteria include date range, client ID, client name, and company name.

**COD Report** lists all COD items shipped by a specific CPC customer. Report criteria include date range and CPC customer number. This report enables you to manage the COD collection process after shipping.

**Cost Centre Detail – Manifest Report** reports the value of each line item allocated to a specific cost centre. Report criteria include date range, CPC customer number, and cost centre. This report enables you to manage the charge back of shipment fees by cost centre.

**Cost Centre Summary – Manifest Report** reports the total value of shipping transactions for a specific cost centre, summarized by service. Report criteria include date range, CPC customer number, and cost centre.

**Credit Card - Manifest Report** lists the manifests paid for by credit card. Report criteria include date range and credit card type.

**Customer Detail Report** reports the total value of shipping transactions for a specific CPC customer, for all of that customer's accounts. Report criteria include date range and CPC customer number.

**Customer Summary Report** reports the total value of line items shipped for a specific CPC customer, summarized by service. Report criteria include date range and CPC customer number.

**Item Inquiry Report** lists the delivery status of shipped items. Report criteria include manifest number and item reference.

**Manifest Report** lists all closed manifests currently in the database. Report criteria include date range.

**Open Imported Order Report** lists all outstanding orders from the order entry file, sorted by date, in a preview format. This report allows you to confirm that all the imported orders have been processed. This report has no criteria.

**Parcel Return Report** provides manifest information on parcel return orders. Manifest number is required to initiate the query.

**Product Summary Report** lists the total items shipped within a product category. Report criteria include date range and service.

## 7.2 Delivery Confirmation

To access this window, select **Delivery Confirmation** from the Reports menu.

### Overview

You can use Electronic Shipping Tools to confirm delivery of domestically shipped items or groups of items. Use the Delivery Confirmation window to search for and confirm delivery of a single item, or all items that can be confirmed that are associated with a particular manifest. Access this window by selecting Delivery Confirmation from the Reports menu

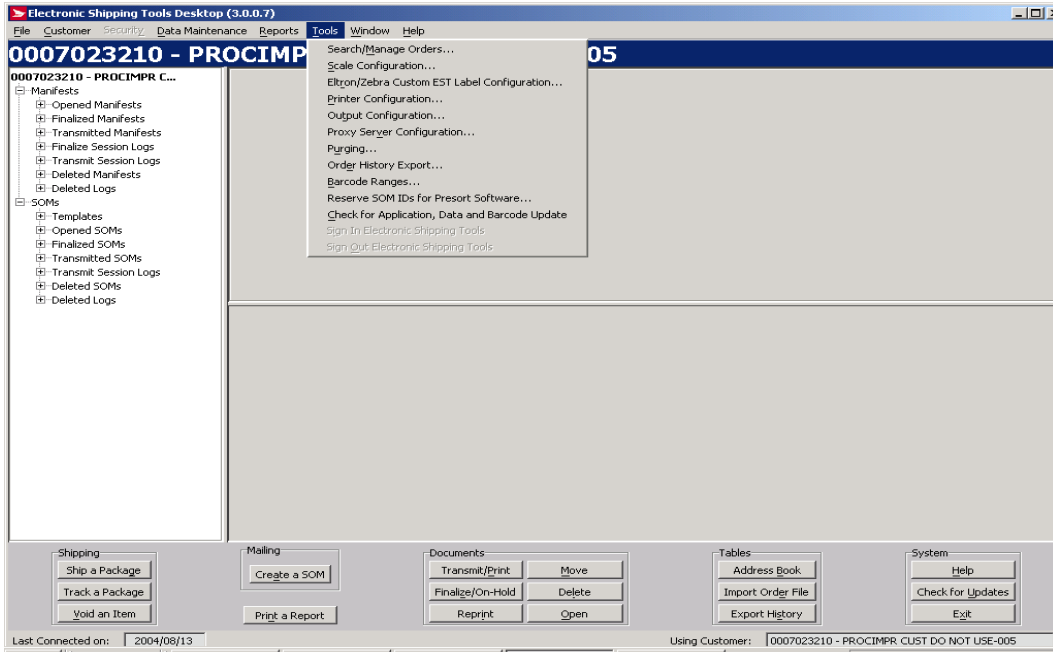
For an item or manifest to appear in this window and be selected for confirmation, it must meet the following criteria:

- It must have a delivery confirmation option.
- It must have been transmitted to Canada Post.
- It must not be voided.
- It must not already have a final response status (i.e., successful delivery was previously confirmed).

<b>Delivery Confirmation</b>	
<b>COMMAND OR MENU ITEM</b>	<b>RESULT OF INVOCATION</b>
<u>S</u> earch	Once you have entered criteria from the drop down menu, click Search to conduct the search. Select from Company, Client Id, Item Identifier, Last Name, Manifest Number, or Imported Order Id.
All Manifest Items	Once the Search Results frame has been populated with all confirmable transactions allocated to a closed manifest by conducting the appropriate search (i.e., completing the Manifest # field and clicking Search), you can confirm delivery for all confirmable items on the manifest by invoking the overnight batch delivery confirmation process. Click Manifest. Electronic Shipping Tools will send a delivery confirmation request the next time you communicate with Canada Post. The request will return a description of the most significant event, the date of the event and the signatory name
Event Description	Click the Event Description command button to display a separate window that shows the complete Delivery Confirmation Description (which is up to 400 characters).
Submit	Select Submit to send information.
<u>P</u> rint	Once Electronic Shipping Tools has received a response to either an item or manifest delivery confirmation request, the results are displayed on this screen. You can then click Print to print the results.
<u>C</u> lose	Click this button to exit this window.



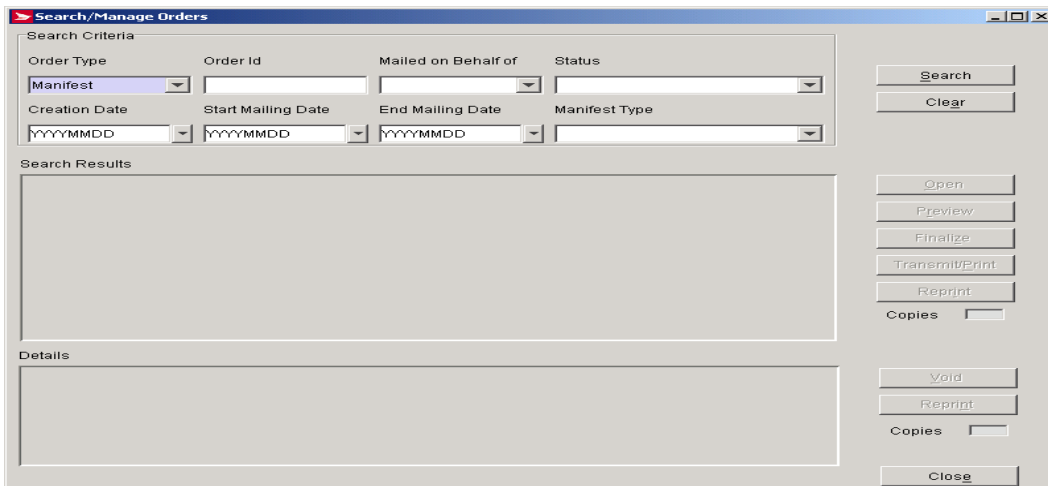
# 8.0 Tools Menu



Use the **Tools** menu to perform system functions and configure peripheral equipment used with Electronic Shipping Tools as follows:

## 8.1 Search/Manage Orders Window

The screen displayed below shows an example of a Shipping and Delivery Services screen, which has different functionality than Communications Business. For the purposes of the application functionality, only the commands and features of the Communications Business are described.



### Overview

This user interface component enables you to search for SOMs. Selecting the Search/Manage Orders from the Tools menu triggers it. From this window one can search for and retrieve Orders from the database and Open, Preview, Finalize, Transmit or Reprint the Order.

1. The Search window allows you to search for and retrieve transactions using the following search criteria:

- Order Type;
- Order Id
- Mailed on Behalf of (Customer Number)
- Status;
- Creation Date;
- Start Mailing Date;
- End Mailing Date; and
- Service Offering (displayed as Manifest Type in the screen below)

**Note:** The Search Results column headings will only appear once the SOM search results are returned. As well, the Details column headings and data will only appear once a SOM has been selected. When more than one entry is selected from the Search Results table, the Details table is cleared, including column headings.

2. You can enter one or more search criteria.
3. If the Start Mailing Date is entered and the End Mailing Date is blank, search is performed on Transactions that have a Mailing Date greater than or equal to the Start Mailing Date. If the End Mailing Date is entered and the Start Mailing Date is blank, search is performed on Transactions that have a Mailing Date less than or equal to the End Mailing Date.
4. When the Start Mailing Date and End Mailing Date search criteria are entered, the search is performed on the Order Details for SOMs that have the Downstream Entry checkbox selected (as opposed to at the header level). If at least one line item contains a Date of Mailing within the search criteria entered, the SOM is displayed in the Search Results pane.
5. Transactions that match the input search criteria are listed in a data grid and are sorted by Order Id (SOM Id), then by local Id, in ascending order. You can sort the list by different fields by clicking the title of the appropriate column in the Search Results and Details grids.
6. The copies fields are defaulted with the value of 1.
7. Multiple rows (i.e. items) can be selected in the Details pane for the purpose of deleting and reprinting items.
8. The Search/Manage Orders window includes a status line at the bottom to display messages for processes that are not immediate, such as Transmit/Print.
9. The Drop Down List for the Date fields is defined below:
  - You can select a date from a visual calendar component.
  - When a date is not specified in the applicable field, the Month, Year and Day are defaulted to the current date.
  - When a date is specified in the applicable field, the Month, Year and Day are set to the value entered in the field.
  - You can scroll sequentially through the Calendar Month values (January to December) or Year values by using the mouse to click on the up and down arrows buttons located adjacent to the month or Year labels.
  - Either clicking on the desired value or using the up/down/left/right arrow keys performs navigation through the Day values
  - Clicking on another field on the parent window closes the Calendar component and the date selected is returned to the date field. To clear the date field, press the Esc key.
  - The specified date is returned and displayed in the date field when:
    - You double click on a particular day with the mouse; or
    - Use the mouse or arrow keys and press the Enter key.

February							2000
S	M	T	W	T	F	S	
		1	2	3	4	5	
6	7	8	9	10	11	12	
13	14	15	16	17	18	19	
20	21	22	23	24	25	26	
27	28	29					

## Search/Manage Orders

COMPONENT LABEL	DESCRIPTION
<b>Search Criteria</b>	
Order Type	Search criterion
Order Id	Search criterion
Mailed on Behalf of	Search criterion
Status	Search criterion
Creation Date	Search criterion
Start Mailing Date	Search criterion
End Mailing Date	Search criterion
Service Offering	Search criterion
Copies (SOMs)	This field indicates the number of copies (1-9) that should be printed for the selected SOMs.
<b>Search Results</b>	
SOM Id	This field identifies the system-generated number assigned to the SOM.
Local Id	This field identifies the system-generated number assigned to the SOM.
Service Offering	This field identifies the Service Offering (e.g. Lettermail) of the SOM.
Mailed on Behalf of Customer Number	This 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).
Downstream Entry	This field identifies that the mailing is downstream, allowing the customer to specify the Outlet, Date of Mailing and Shipment No. at the line item level.
Outlet Name	This field identifies the outlet name selected at the header level. It identifies where the mail is paid when Downstream Entry is selected. Otherwise, it identifies the outlet name where the mail is brought for induction into CPC's mail stream.
Method of Payment	This field indicates the customer's chosen method of payment for the mailing.
Date/Time	This field identifies the date and time the SOM was created.
Mailing Date	This field identifies the date when the mailing is to be inducted at Canada Post. The Date of Mailing has an influence on the calculation rules.
Total Volume	This field identifies the Total Number of Pieces included in this SOM.
Status	This field identifies the Status of the SOM (e.g. Transmitted).
Attempted Communication Date	This Field identifies the date that the data was transferred to the CPC Server.
Grand Total	This field identifies the Total Cost associated with this SOM.
<b>Search Details</b>	
Service Description	This field identifies the service description chosen for the line item.
No. of Pieces	This field identifies the total number of pieces per specific line item, making up part or all of a mailing issue.
Weight per Piece	This field indicates the weight for a specific line item on the data entry form. The Weight is necessary to calculate postage costs.
Unit of Measure	This field indicates the unit of measurement ('g' or 'kg').
Eligible for PAP	This field identifies whether a specific line item is eligible for the DCH subsidy.
Outlet	This field identifies the outlet name where the SOM line item is brought for induction into the CPC's mail stream. This field only applies when Downstream Entry is selected.
Date of Mailing	This field identifies the date when the SOM line item is to be inducted at Canada Post. This field only applies when Downstream Entry and/or Mailing Type Partial is selected.
Calculated Metered Rate	This field shows the rate that should be used to meter the mailing items.
Price/Piece	This field identifies the price of a piece of mail for the given line item.
Price/kg (\$)	This field identifies the weight price associated the given line item.
Transportation Required	This field identifies whether a specific line item requires transportation.
Transportation Price/Piece	This field identifies the transportation price of a piece of mail for the given line item.

Postage	This field identifies the total postage cost for the mail items of the given line item.
---------	---

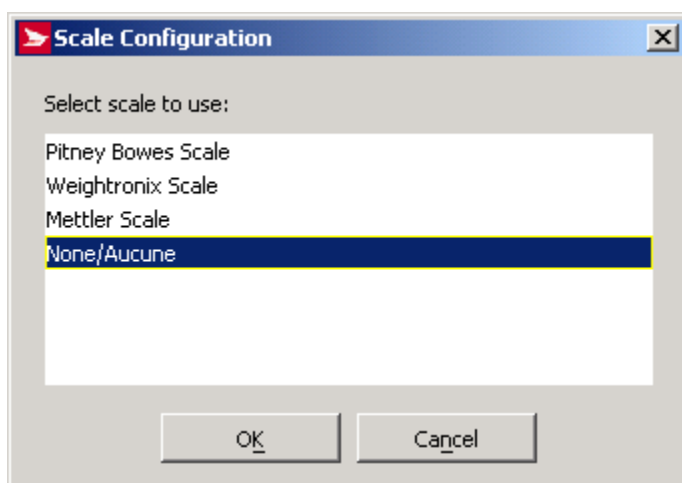
## Command Buttons

The following table describes the Command Button definitions and displays the hot key definitions (by underlining the letter in question):

COMMAND BUTTON OR MENU ITEM	RESULT OF INVOCATION
<u>S</u> earch	A query is generated based on the search criteria entered. If no transactions are found in the database that match the search criteria then a message is displayed. If more than 500 transactions are found, a warning message will be displayed. If one or more transactions are found they are listed in the data grid A warning message will be generated if the <u>S</u> tart Mailing Date is greater than the <u>E</u> nd Mailing Date.
<u>C</u> lear	All search criteria fields; Search Results and Details tables are cleared, allowing a new search to be initiated.
<u>O</u> pen	Opens the data entry window for the selected Order and populates the window with data located in the selected Order or template record. For a SOM with a status of transmitted, the following information is not retrieved from the saved SOM record. Issue Date (Publications Mail only) Mailing Date
<u>P</u> review	When a SOM entry is selected, performs the same process as the Preview button.
<u>F</u> inalize	Performs the same process as the Finalize button on the main Desktop window.
<u>T</u> ransmit/ <u>P</u> rint	Performs the same process as the Transmit/Print button on the Desktop window.
<u>V</u> oid	Enabled when you have selected from the Details pane a single manifest entry with a status of 'Opened'. Opens a confirmation window 'Are you sure you want to void this line item?' If confirmed: Clears (i.e. sets to zero) the Quantity, Keyed and Calculated weight and all changes fields; Resets the Traceable and Notify Recipient indicators to false; Sets the item as 'Void' and closes the confirmation window. If the action is cancelled, closes the confirmation.
<u>R</u> eprint	Performs the same process as the Reprint button on the desktop window.
<u>C</u> lose	The Search window is closed and the Desktop window is displayed.

## 8.2 Scale Configuration

Access this window by selecting **Scale Configuration** from the **Tools** menu.



### Overview

Use the **Scale Configuration** window to set up and default the scale you will be using with Electronic Shipping Tools, or to indicate that you will not be using a scale.

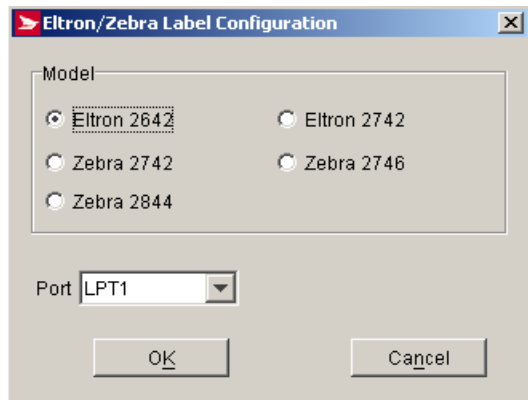
Electronic Shipping Tools supports three scale vendors: the **Pitney Bowes scale**, the **Weightronix scale**, and the **Mettler scale**. Select your scale type from the list, or select **None/Aucune**, then click **OK**.

Once you have selected a specific scale, use the <scale name> **Scale Configuration** window to configure that scale.

<b>Scale Configuration</b>	
<b>COMMAND BUTTON OR MENU ITEM</b>	<b>RESULT OF INVOCATION</b>
Scale Selection List	Electronic Shipping Tools supports three scales: the Pitney Bowes scale, the Weightronix scale and the Mettler scale. Select your scale type from the list, or select None/Aucune, then click OK. If you selected one of the scales you will then have an opportunity to configure the scale more specifically using the Scale Configuration window
OK	Once you have selected a scale type, or have selected None, click OK. If you selected one of the scales you will have the opportunity to configure the scale more specifically.
Cancel	Click to close this window without changing your scale selection. You are not prompted to configure a selected scale.

### 8.3 Eltron/Zebra Custom EST Label Configuration

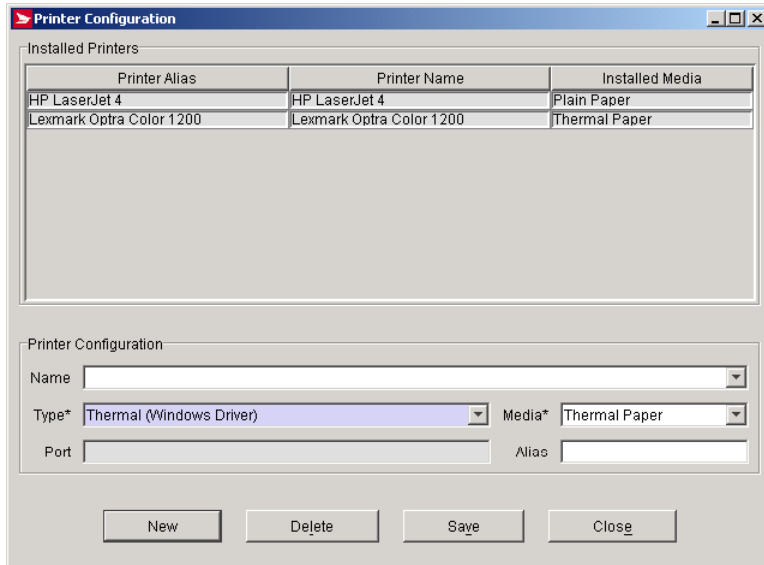
From the Desktop Main Menu, select Tools, Eltron/Zebra Configuration to set-up an Eltron or a Zebra Thermal Printer;



#### Overview

Select the model of Eltron printer and from the drop-down list one of the pre-defined ports available on the workstation's operating system and press OK to accept.

## 8.4 Printer Configuration



Access this window by selecting **Printer Configuration** from the **Tools** menu.

### Overview

Use the **Printer Configuration** window to set up your Windows printers to recognize and print the various types of labels and forms that are generated by Electronic Shipping Tools. In this window, you enter the name and type of your printer(s), and what kind of paper/label you'll be printing.

The **Printer Configuration** option allows you to identify the printer (s) to be used with the application. Printers can be added, deleted or modified within the user interface component. For each printer, you can indicate the type (Laser, Dot Matrix or Thermal), the media (plain paper, Thermal paper or pre-printed Dot-Matrix forms). From the Main Menu, select **Tools > Printer Configuration**.

### Custom Thermal Printers

The Desktop version now supports all thermal printers defined by your computer's operating system through your Windows drivers.

You may select from the drop down list, a different thermal printer. The most common ones are found under Thermal (Windows Driver), which does not include the integrated driver within the application, as per the Eltron models. However, you will first need to install the appropriate printer-specific Windows driver on your workstation.

**Please Note:** If you encounter printer specific driver installation errors, please refer to your printer manual for assistance

There is a close relationship between the printer and media type, and the labels that are printed on that media. For instance, a Laser printer will print only plain paper or Avery labels; a Thermal printer will print only on thermal paper; a Dot Matrix printer uses tractor-fed plain paper, pre-printed labels, multi-part paper, and other types. This, of course, affects the type of labels you order and use, and Electronic Shipping Tools needs to know how you want your output to appear.

This window is closely tied to the **Output Configuration** window, where you tell Electronic Shipping Tools more specifically how you would like the various kinds of output produced, based on your printer selections and configurations here.

Printer Configuration	
COMPONENT	DESCRIPTION
Installed Printers	A listing of all printers currently configured for this application.
Printer Alias	An alternate name for the printer that is user defined.

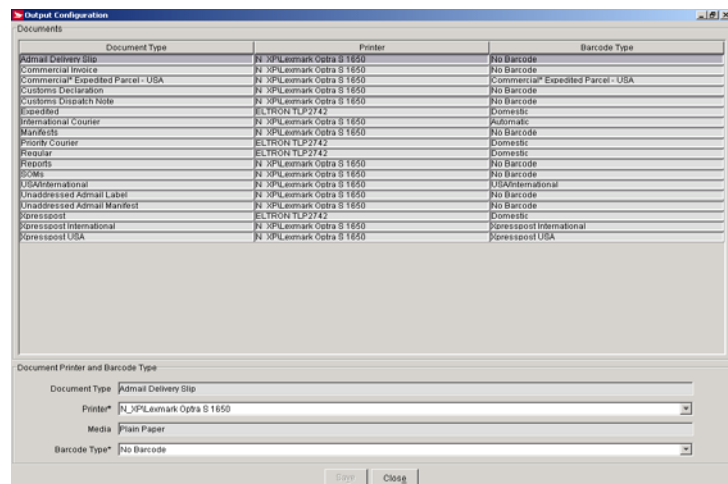
Printer Name	The make and model of the printer generated from the list of printers installed through Windows.
Installed Media	The media (paper) type that is currently associated with the printer.
Printer Configuration	The user input area to define the available printers.
Name	The make and model of the printer. The field will initially be populated with the Name of the Printer selected. When adding a new printer, the field will be cleared and the drop-down will present the user with a choice of all Windows configured printers on their system. This field is mandatory.
Type	Type of printer selected and is used to validate the various media types to be used. This field is populated with Type of the printer initially selected. If configuring a new printer, this field will be cleared and the user will be given the choice of selecting one of three types: Dot Matrix, Laser or Thermal.
Port	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 read only)
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 the user will be given a choice of various media types based on the type of printer selected.
Alias	An alternate name for the printer that is user definable. Initially, this field is populated with the Alias of the selected printer. The user can modify it. If a new printer is being configured, once a Printer Name is selected, this Name automatically populates the Alias field but the user can change it immediately.

## Command Buttons

COMMAND BUTTON OR MENU ITEM	RESULT OF INVOCATION
New	All fields in the Printer Configuration Group Box will be cleared and focus will be on the first Printer Name within the opened drop-down box. Select a Printer.
Delete	If a printer is not selected, displays error message to inform you to select a printer to delete. If a printer is selected, displays warning message to confirm the deletion. If OK is pressed, deletes the printer currently selected. If Cancel is pressed, returns control to calling window.
Save	When one of the fields has been modified, select Save Printer Configuration. Information within the Installed Printers group Box is immediately updated.
Close	Close Printer Configuration Window. Return control to Main Menu.

## 8.5 Output Configuration

Access this window by selecting Output Configuration from the Tools menu.



## Overview

Use the Output Configuration window to specify, for each document and label type produced by Electronic Shipping Tools, the printer to use and the barcode type to expect.

**This configuration relies on the configuration performed in the Printer Configuration window. There is a close relationship between the printer and media type, and the labels, reports, and manifests that are printed on that media.**

## Window Graphical Component Definitions

The purpose of this section is to identify the labels for each window graphical component and to describe its functionality.

<b>Output Configuration</b>	
<b>COMPONENT</b>	<b>DESCRIPTION</b>
Documents	This list displays summary information about all currently configured document types. 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.
Printer	The printer currently associated with the corresponding Document Type.
Barcode Type	The Barcode Type currently associated with the corresponding Document Type.
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.
Printer	Initially, the Printer of the selected Document Type will be displayed. The drop-down list will display a list of printers configured on your workstation. If there is only one printer configured on the workstation, it should be defaulted for all Document Types. 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)
Barcode Type	For Shipping and Delivery Services only. 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 fields and Command Button

<b>COMMAND BUTTON OR MENU ITEM</b>	<b>RESULT OF INVOCATION</b>
Save	When one of the fields has been modified, select Save to save your changes.
Close	Close the Output Configuration Window.



## 8.6 Proxy Server Configuration

Access this window by selecting Proxy Server Configuration from the Tools menu.

**Configure Proxy Server**

**Tell us about your Proxy Server**

In many cases, direct Internet connections require the use of a proxy server. If you're using a modem to connect to the Internet, you probably don't have a proxy server.

If you are not sure about your proxy information, contact your Network System Administrator.

Proxy Server Information

Do you want to use a proxy server?  Yes  No

HTTP Proxy:  Port:

Security Proxy:  Port:

Your proxy server may require user authentication. If so, click Authentication to enter your username and password.

Authentication

OK Cancel

### Overview

The Proxy Server Configuration task allows you to manage the Proxy Server information. You can modify Proxy Server data or select not to use a Proxy Server. Selecting Proxy Server Configuration from the Tools menu accesses this window.

If a Proxy Server is used, you will be required to enter the Proxy Server IP Address and Proxy Server Port. Your Network Administrator will be able to assist you in this process.

When you select Yes, you will be required to enter the IP address and port of you 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**

Please enter your proxy server authentication information:

HTTP Proxy

User ID:  Password:

Security Proxy

User ID:  Password:

OK Cancel

Proxy Server Configuration	
Component	Description
Do you want to use a Proxy Server?	This field indicates whether or not 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)

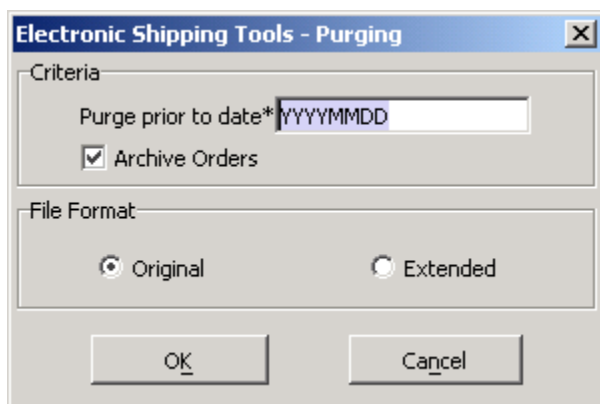
Proxy Server Port	This field identifies the port number for the Proxy Server.
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## Command Buttons

COMMAND BUTTON OR MENU ITEM	RESULT OF INVOCATION
<u>A</u> uthentication	Enabled when a proxy server is selected. As part of the proxy server authentication, a valid user id and password must be entered.
<u>O</u> K	When one of the fields has been modified, select OK to save your changes.
<u>C</u> lose	Close the Configure Proxy Server Window.

## 8.7 Purging

Access this window by selecting Purging from the Tools menu.



### Overview

The Purging window allows you to archive older, historical data from the Electronic Shipping Tools database. This will reduce the size of the database, and may increase application performance.

Purging means that data will no longer be available for reporting within the application. To purge data, you must enter a date, which must be minimum of 60 days prior to the current date.

You can specify if archiving is desired. Archiving saves the purged records for reference purposes. If you choose not to archive, the data purged will be completely lost.

If requested, archived orders can be purged in the same file layouts as those produced during the Order History Export process. An archive file can facilitate the creation of a separate database.

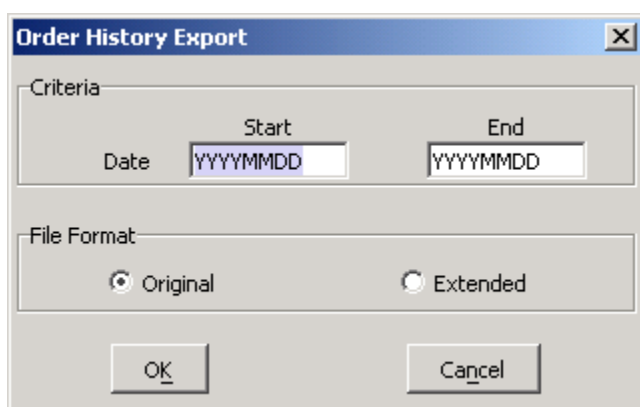
Format for files the suffix used for the file names is Archive. The transmission log files are comma-delimited files where files are all enclosed in double quotes (""). The application will store a blank entry (i.e. "") where no information is available.

Name of file created: Transmit Log Archive.txt

ENTITY NAME	ATTRIBUTE NAME	DESCRIPTION
Transmission Log	Transmission Log Id	Transmission Log Id.
Transmission Log	Transmission Date	Transmission Date.
Transmit Order Message	Order Id	Order Id.
Transmit Order Message	Message Type Code	Message Type Code.
Transmit Order Message	Diagnostic	Transmission Message.
Transmission Log	Application Version Number	Version Number of the application when transmission occurred.

## 8.8 Order History Export

Access this window by selecting Order History Export from the Tools menu.



### Overview

You can export shipping information for integration into your own database for creating your own reports, or to facilitate electronic reconciliation. Exporting is accomplished using the Order History Export window.

Enter a Start Date and an End Date for the exported information in the fields provided on the Order History Export window, then click OK. Electronic Shipping Tools will then prompt you for a name and location for the saved files using a standard Windows format. Follow the prompts to save your manifest, mailing items, and mailing item add-ons information.

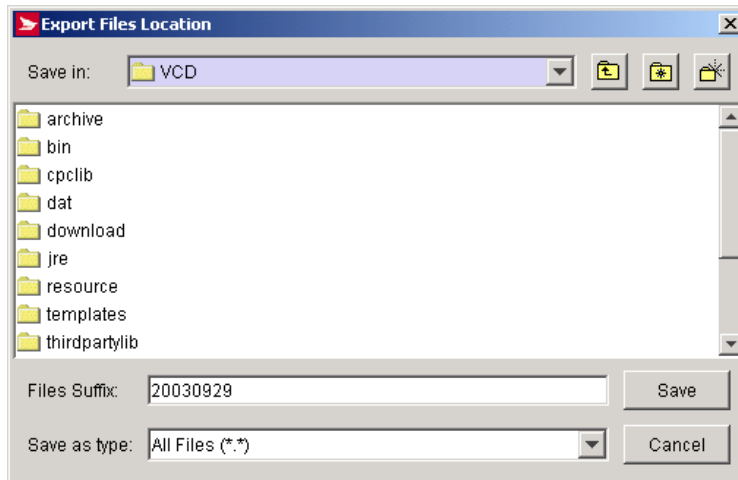
Format for files Order History Export files are comma-delimited files where fields are all enclosed in double quotes (" "). The system will store a blank entry (i.e. "") where no information is available.

Note: Field descriptions (such as Method of Payment Description) are in the language of the user that initiated the process.

Exported files include:  
Shipping and Delivery Services:  
Manifests  
Manifest Items  
Mailing Item Add-ons  
Manifest Bulk Items

If no Order of a given category (i.e. Manifest or SOM) matches the selection criteria, none of the files in that category are created.

Upon validation of the date information, the Export Files Location window is displayed:



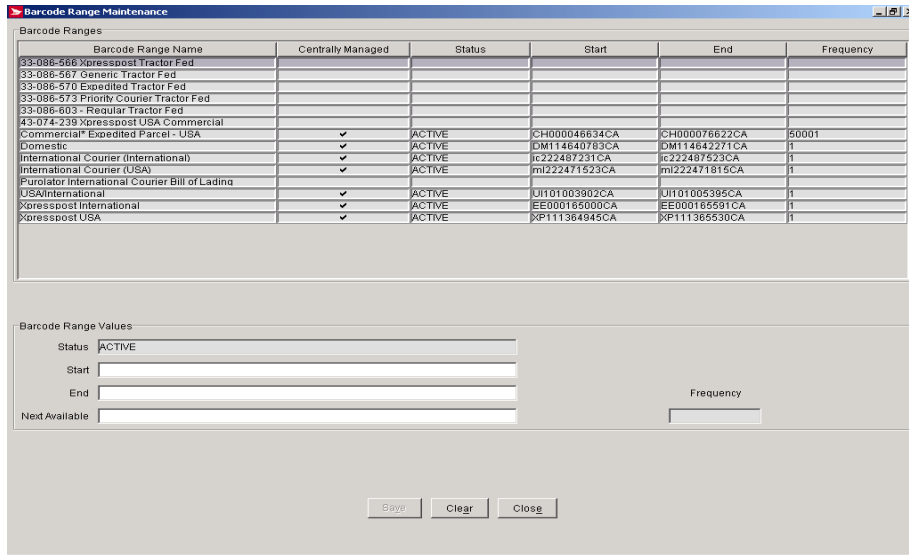
<b>Export Files</b>	
<b>COMMAND BUTTON OR MENU ITEM</b>	<b>RESULT OF INVOCATION</b>
Save in	Displays the location of the current folder in the hierarchy of folders on the computer.
Up One Level	Opens the folder on level higher than the current folder selected and refreshes the information in the list box.
View Desktop	Toggles the current folder from Desktop to My Computer.
Create New Folder	Creates a new folder under the current directory. Allows the user to name the directory.
List	Lists the name of the folders and files in the List Box.
Details	Lists the details of the folders and files in the List Box.
Files Suffix	Provides a space for you to enter a suffix that will be appended to the name of files (see Order History Export Files section for details). Defaults to Current Date in yyyyymmdd format.
Save as type	Specifies the extension of the files be saved. Defaults to 'Text (*.txt)'. '
Save	Performs validations and saves file.
Cancel	Closes the window

### Order History Export File Layouts

The Order History export files are comma-delimited files where fields are all enclosed in double quotes (""). The system will store a blank entry (i.e. "") where no information is available.

## 8.9 Barcode Ranges

Access this window by selecting Barcode Ranges from the Tools menu.



## Overview

Use the Barcode Range Maintenance window to enter a range of item identifiers associated with barcodes used on pre-printed labels. Centrally managed barcode ranges must be activated through this screen. This window also allows for the management of application-generated barcodes.

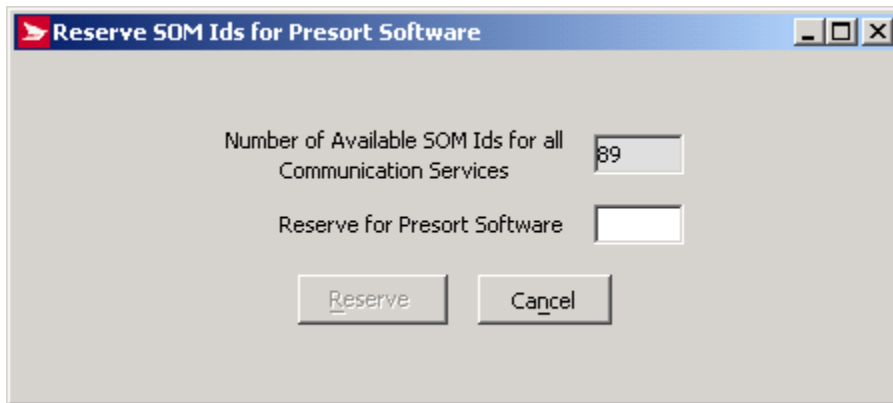
The Barcode Ranges frame displays a list of Canada Post Shipping and Delivery Services products, and the ranges of item identifiers currently assigned to the product. To assign a range of item identifiers to a product, click the product name in the Barcode Range Name column, complete the fields in the Barcode Range Values frame, then click Save.

The Frequency field allows you to modify the frequency a range is refreshed. Shippers who use hundreds of barcodes daily will be prompted to reconnect when the ranges are depleted during the shipping process.

Barcode Range Maintenance	
COMMAND BUTTON OR MENU ITEM	RESULT OF INVOCATION
Barcode Range Name	This frame displays a list of Canada Post Shipping and Delivery Services products, and the ranges of item identifiers currently assigned to the product. To assign a range of item identifiers to a product, click the product name in the Barcode Range Name column; complete the fields in the Barcode Range Values frame, then click Save.
Start	Enter the item identifier (barcode number) that starts the range of labels provided to you. The format for a complete item identifier is AA ### # ## AA (a two-letter prefix, a nine-digit number, and a two-letter suffix).
End	Enter the item identifier (barcode number) that ends the range of labels provided to you. The format for a complete item identifier is AA ### # ## AA (a two-letter prefix, a nine-digit number, and a two-letter suffix).
Next Available	Enter the nine digits that make up the numeric portion of the item identifier (barcode number) that is next to be used in the range of labels provided to you. If you are entering a new range of labels, this is the first label in the range. The format for a complete item identifier is AA ### # ## # ## AA (a two-letter prefix, a nine-digit number, and a two-letter suffix).
Frequency	If you use a thermal printer, in this field, enter the number of item identifiers to be downloaded from the Canada Post server. See the Barcode Management topic for more information.
Clear	Click Clear to erase the current values in the Barcode Range Values fields without saving.
Save	Click Save to save the current values in the Barcode Range Values fields.
Close	Closes the window

## 8.10 Reserve SOM Ids for Presort Software

Access this option by selecting Reserve SOM Ids for Presort Software from the Tools menu (for Communication Business only).

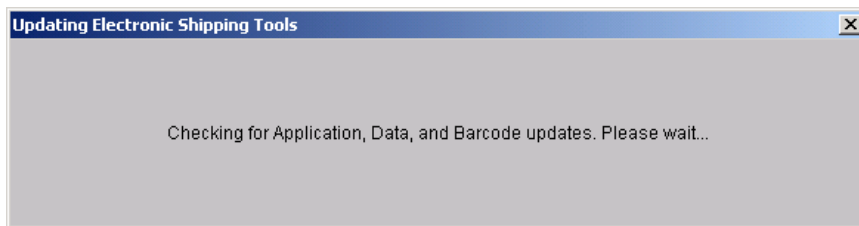


### Overview

Reserve SOM Ids for Presort Software allows you to select one or more SOM Ids for use by Recognized SERP\* Presentation Software with Barcode Recognition. Once you export or print the SOM Ids, the status will be updated from "Reserved" to "Assigned for SERP\*".

## 8.11 Check for Application Data and Barcode Update

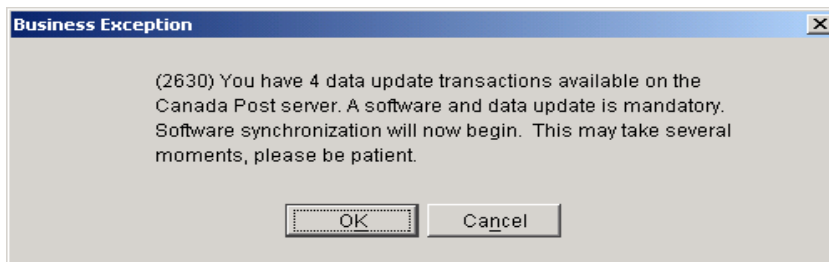
Access this option by selecting Check for Application, Data and Barcode Update from the Tools menu.



### Overview

When selecting this option from the Tools menu, the CPC server first verifies that your installed version of the application is current. If the update exists on the CPC server, the update can occur automatically or in some cases, an update may be deferred for a later time. In any case, you will be prompted to restart the application following the update process.

If you are part of a Multi-user environment, a warning message will be displayed indicating that all users should sign out of the application until the update process is complete.



### Overview

Use the Check for Application, Data and Barcode Update option to connect immediately to Canada Post to download data to your desktop application. Key in your User ID and Password, then click OK to proceed. Click Cancel to abort the connection procedure.

## 8.12 Sign In Electronic Shipping Tools

Access this window by selecting Sign In Electronic Shipping Tools from the Tools menu.

### Overview

The Sign In Electronic Shipping Tools window enables you to logon to the Electronic Shipping Tools application as well as to change your password.

The Sign In Electronic Shipping Tools window is available only when Security Enabled is selected in the Options tab in the Site Information window. When Security is enabled, the administrator may have identified specific functions for specific users, thus restricting Sign On access through the main menu drop downs. If the Sign In window is displayed when you double click the application ID, you will be required to enter a User ID and password, otherwise you can start to use the application right away.

You can sign in to the Electronic Shipping Tools two ways:

Double click on the Electronic Shipping Tools application icon, which will launch the application and present the Sign In Electronic Shipping Tools window or select Sign In Electronic Shipping Tools from the Tools main menu in Electronic Shipping Tools to sign in a new user.

Enter a valid User Id and Password in the pop-up window, then click OK or press Enter.

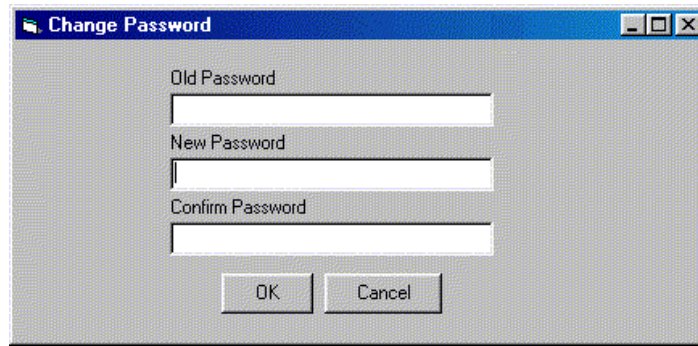
Note: The system will remember the User ID between sessions if the Remember User Id checkbox is checked. If you don't know your User ID or Password, contact your system administrator. If you still can't get them, contact the Help Desk.

The initial Sign In will be dropped after a pre-determined period of inactivity, so if you are creating a manifest in the disconnected state, you will need to reconnect when you're ready to transmit. The Sign In screen will facilitate the Sign On activity, where in most screens, the Sign On screen is initiated through command button invocations such as Transmit/Print.

Sign In		
	USER ACTIONS	USER INTERFACE
Sign In (from application icon on Windows desktop)	Double click on the application icon, which is located on the computer screen desktop.	Enter valid User Id and Password to access the application. Note: User Id is not required each time as the system can remember it between sessions.
Sign In (from Tools menu)	Select Sign In sub-menu item from the Tools main menu.	Enter a valid User Id and Password to access the application.
Change Password	Click on the Change Password Command Button on the Sign In window.	Enter your old password, along with a new password

### Change Password

Access this window by selecting **Sign In Electronic Shipping Tools** from the **Tools** main menu, then clicking the **Change Password** command button, which opens the **Change Password** window (below).

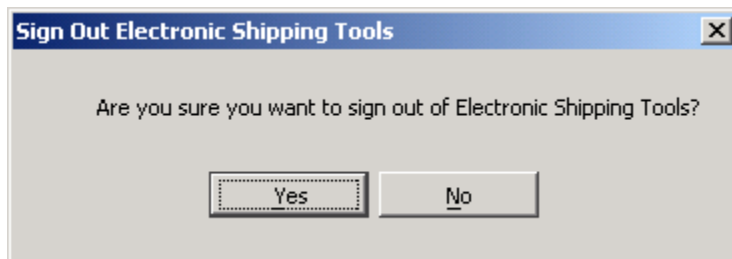


User Ids and passwords are alphanumeric with a maximum length of 8 characters. Selecting the Remember User Id box will result in your User Id being displayed in the field the next time you are presented this Sign In screen.

If you select the Change Password button, a dialog box is presented (above). Enter your old password, along with the new password in the **New Password** and **Confirm Password** fields. Select Ok after you have changed your password.

## 8.13 Sign Out Electronic Shipping Tools

Access this window by selecting **Sign Out Electronic Shipping Tools** from the **Tools** menu



### Overview

The **Sign Out Electronic Shipping Tools** window allows you to sign out of Electronic Shipping Tools. Signing out will disconnect you from the Electronic Shipping Tools server, if a connection exists and will log off the current user.

The **Sign Out Electronic Shipping Tools** window is available only when **Security Enabled** is selected in the **Options** tab in the **Site Information** window.

Selecting **Exit** from the **File** menu will automatically close down the application completely, whereas if **Sign Out Electronic Shipping Tools** is selected from the **Tools** menu, a pop-up window will display to confirm if you want to sign out of Electronic Shipping Tools. If you select **Yes**, your User ID will be logged off and you'll be returned to the main menu of the application. If you select **No**, the pop-up window will be closed and you'll be returned to the previous window.



# 9.0 Window Menu

## Overview

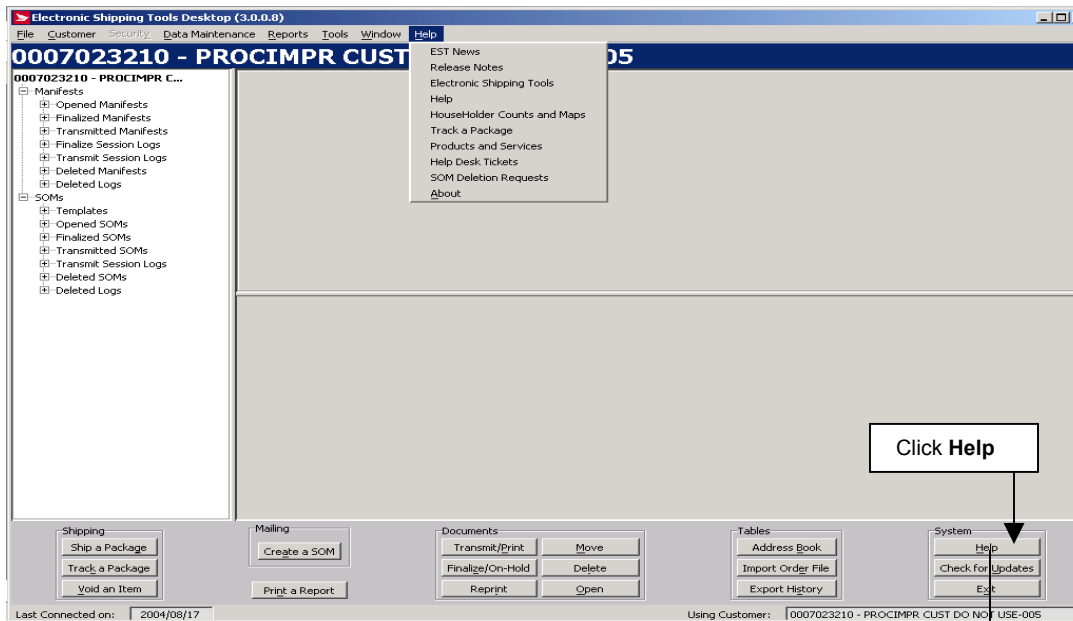
Use the Window menu to select from the open windows on the Electronic Shipping Tools application.

# 10.0 Help Menu

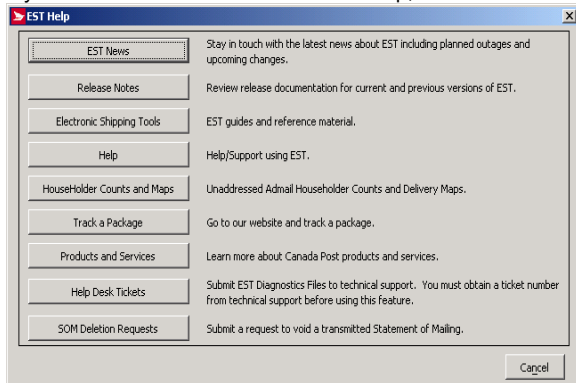
Use the Help menu to access tools you need to complete the order.

You can open EST messages from Help on the Navigation bar.

You can open the Help menu by clicking on the **Help** button on the Navigation bar



If you click on the Command button – Help, this sub-menu will appear:



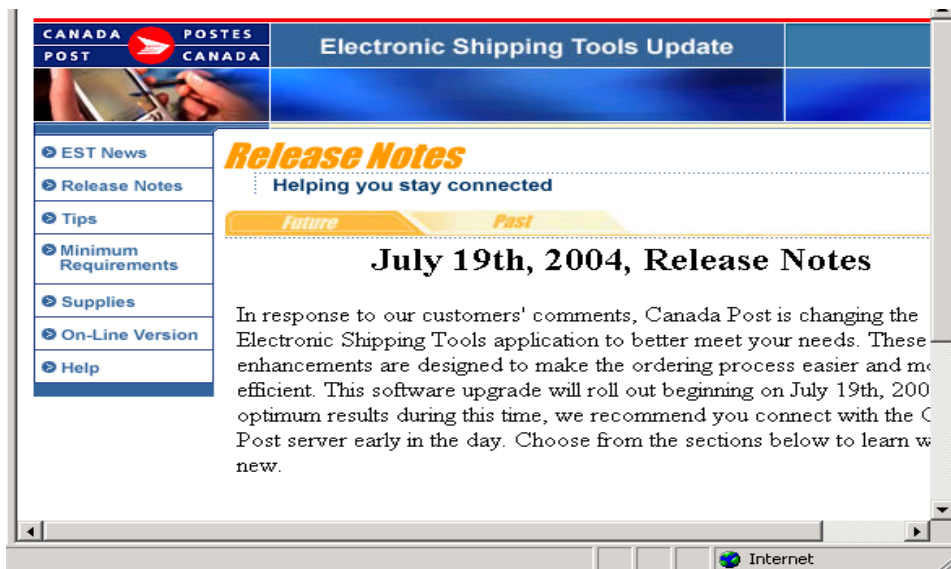
## 10.1 EST News

Select **EST News** to view contents of the upcoming changes and notices for outages



## 10.2 Release Notes

Select **Release Notes** to view contents of Current and Past Release Notes



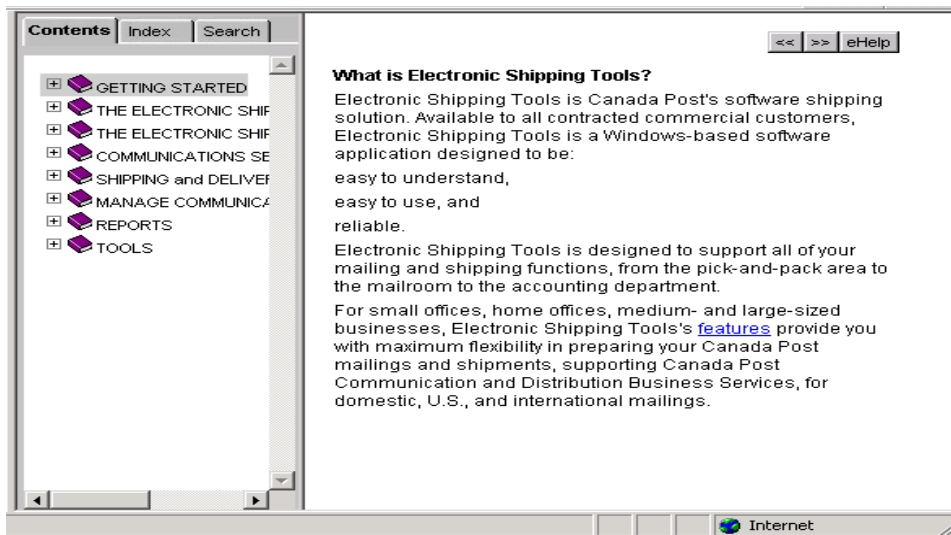
## 10.3 Electronic Shipping Tools

Select **Electronic Shipping Tools** to access directly to the User Guides and reference material



## 10.4 Help

Select **Help** to access the Electronic Shipping Tools Online Help



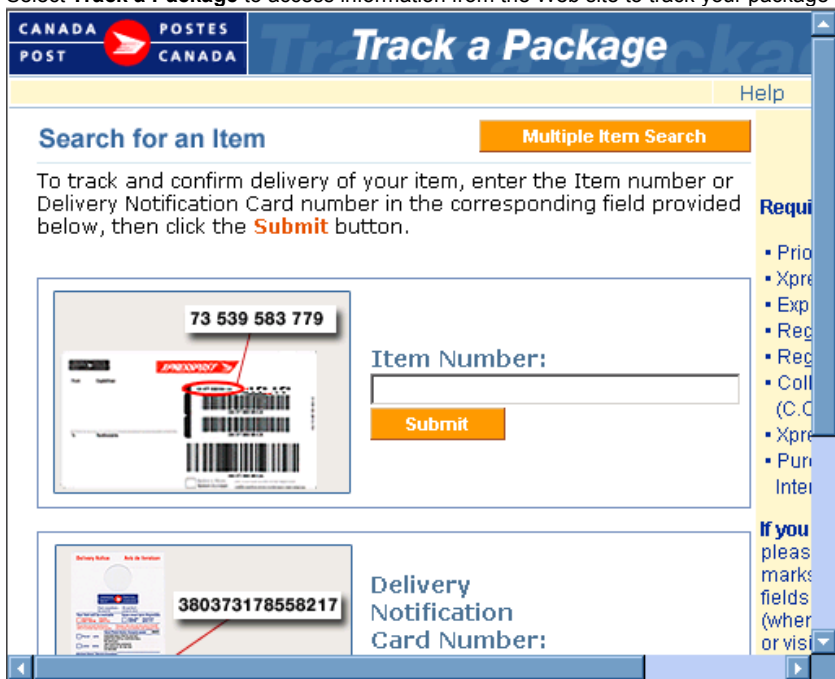
## 10.5 HouseHolder Counts & Maps

Select **HouseHolder Counts & Maps** to access information on the Address Management Tools for the Canada Post Help Desk.



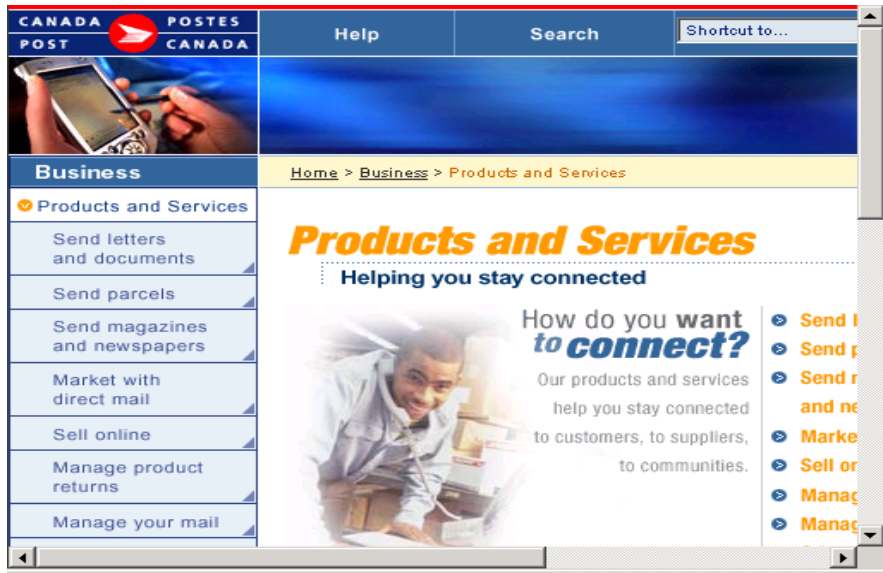
## 10.6 Track a Package

Select **Track a Package** to access information from the Web site to track your package.



## 10.7 Products & Services

Select **Product & Services** to access information about Canada Post products & services directly from the Canada Post web site.



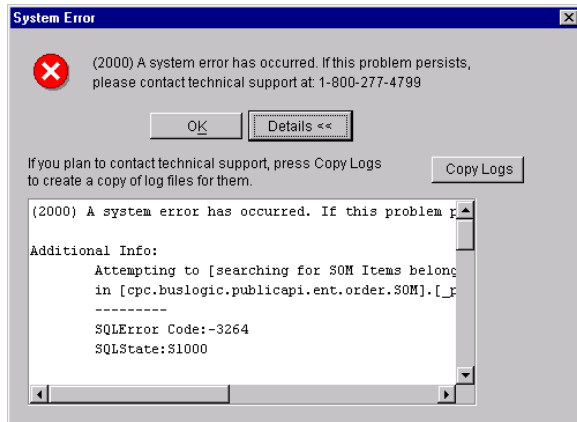
### Contacting the Help Desk

If you have set-up or technical questions that can't be answered using this help, contact the Help Desk weekdays from 7:00 am to 9:00 pm (Eastern Standard Time) at 1-800-277-4799.

If you need supplies, contact the Distribution Centre weekdays from 8:00 am to 6:00 pm (Eastern Standard Time) at 1-888-550-6333.

## 10.8 Help Desk Tickets

When you encounter a **System error** and the problem persists, you must select the *Copy Logs* button to create a copy of the log files that will be required by the Help Desk.



When you select the *Copy Logs* button, the following logs are copied under the VCD installation folder:

- stderr.txt
- stdout.txt
- \bin\upgrades.log
- \bin\desktop.properties
- \bin\synchronization.log
- \download\data.zip

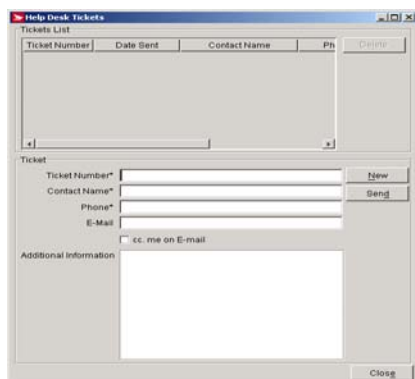
The folder is created if it does not exist, or will be overridden if any log is in the folder. The copied logs are deleted if you upload a Help Desk Ticket.

Once this folder is created, you are ready to contact the Help Desk to open a ticket.

You now have the ability to send an email to the Technical Help Desk from the Desktop application, either related to an OPEN ticket (previously provided by the Help Desk), or requesting the DELETION of a transmitted SOM (directly from the application).

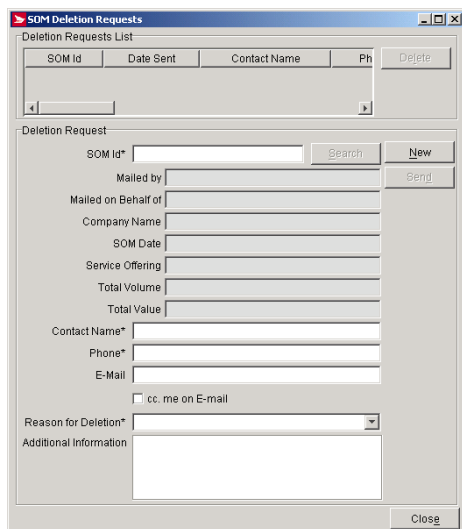
Clicking on a sub-menu, gives you the ability to:

- Create a NEW request
- Browse previous ones
- Click on *Help*
- Select *Help Desk Tickets*
- Call the Help Desk to have a ticket number issued
- Enter this number in the Help Desk Ticket request
- Complete the mandatory fields, and provide any necessary additional information
- eMail your request to the Help Desk



## 10.9 SOM Deletion Request (Communications Orders only)

- o Click on *Help*
- o Select *SOM Deletion Requests*
- o Enter the **SOM ID #**
- o Click on the **Search** button
- o Complete the mandatory fields, and provide any necessary additional information
- o eMail your request to the Help Desk



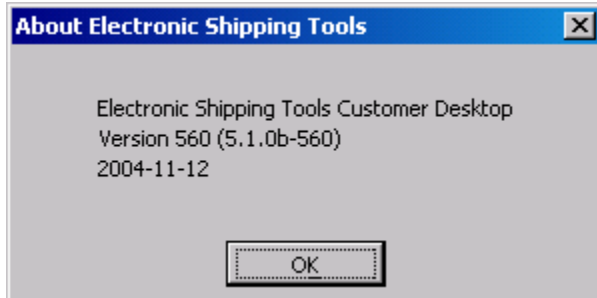
A successfully transmitted email will display the details in the bottom section in read-only mode. With a new request, the details section is blank, allowing you to add further information about the request.

NOTE: While you are composing and sending a request to the Help Desk, the application will not be available for shipping or mailing.

Any orders that were finalized and ready to be transmitted will be sent separately.

## 10.10 About

To access this window, select **About** in the **Help** menu



### Overview

Select **About** in the **Help** menu for information regarding the version of Electronic Shipping Tools.

## 11.0 Manifest Management

Every shipment processed through *Electronic Shipping Tools* must be associated with a manifest. A manifest collects detailed information about each shipment, including billing information. Manifests are created by **Mailed On Behalf Of Customer Number** (i.e. you can have the same manifest type open for different customer numbers), **Service Type** (e.g. Purolator International belongs to the International Courier manifest type and Priority Courier Piece Rated belongs to the Priority Courier manifest type), and **Method of Payment** (e.g. for one customer number, you can have a manifest type open for Account and the same type open for Credit Card).

Generally, you do not need to worry about creating manifests for your shipments. When you select the **Service Type** for your shipment on the **Service** tab of the **Shipping** window, *Electronic Shipping Tools* checks to see if a manifest is already open for the specified **Service Type**. If there is an existing one, the **Manifest** field becomes populated with the manifest name (i.e. date and time of creation), along with its **Local ID**. If there is not already one open, the application automatically creates and opens one for the chosen **Service Type** when you click **Process/Print**.

### 11.1 Transmitting/Printing Manifest

When you are finally ready to ship your items, you need to Transmit/Print the associated manifest. If you need to include any prepaid items, access the **Manifest** window to enter this data. If not, just click on the line item representing the desired manifest on either the **Application Desktop** window or **Search/Manage Orders** window and click **Transmit/Print**. This initiates a connection to the CPC server, and the manifest information is sent.

**ATTENTION!** Remember to include the printed copy of the manifest with your shipment, so that the inclusions can be identified by the Canada Post agent at pick-up (or when you drop it off at a Canada Post location). Otherwise your shipment will be rejected. **A printed copy of the manifest preview is unacceptable.**

If the transmission fails, the application prints a manifest with a "Non-Transmitted" watermark on each page. Attach this printed copy to your shipment and retransmit the manifest later.

### 11.2 Creating Your Own Manifest

You may need to create your own manifest sometimes. For example, you may want to create two manifests for the same **Service Type**, with the intent of using one of the manifests for shipments to be sent today and the other to enter shipments that will not be sent until the end of the week. When you enter shipments using this **Service Type**, the **Manifest** field on the **Ship** tab becomes a drop-down list with all the available open manifests for that **Service Type**. Be certain to assign the shipments to the correct manifest. In the **Manifest** window, you can assign aliases (i.e. meaningful names) to the manifest for ease of reference.

# Manifest Window

The screenshot shows a window titled "Manifest" with the following fields and controls:

- Mailed by:** Text field containing "0007023210".
- Mailed On Behalf Of\*:** Drop-down menu containing "0007023210".
- Contract\*:** Drop-down menu.
- Paid By Customer\*:** Drop-down menu.
- Shipper Reference Number:** Text field.
- Method of Payment\*:** Drop-down menu.
- Selected Credit Card:** Drop-down menu.
- Outlet:** Drop-down menu containing "0553 - LACHINE SUCC PDF".
- Manifest Name\*:** Text field.
- Manifest Type\*:** Drop-down menu.
- Total Prepays:** Text field.
- Destination Postal Code:** Text field.
- On Demand Pickup**
- Buttons:** Save, Preview, Close.

- Access this window by
  1. selecting **New Manifest** from the **File** menu;
  2. double-clicking on a manifest line item on the **Application Desktop** window;
  3. clicking on the line item and selecting **Open** from the **File** menu or clicking the Open button at the bottom of the **Application Desktop** window, or;
  4. clicking on a manifest line item in the **Search Results** frame of the **Search/Manage Orders** window and clicking Open.

Use the **Manifest** window to create a new manifest, or to edit an existing manifest.

## Command Buttons



Click this button to save the current manifest information. The window is *not* closed and the current data remains in case more changes need to be made.



For the preview functionality to work, the manifest must have at least one open item (i.e. not voided) attached to it. Click this button to preview the current manifest. The **Reports** window appears with the heading "Manifest Preview" along with the current date. You can print the manifest preview.



Click this button to exit the **Manifest** window. If you have entered new data or made changes to existing data, a Yes/No/Cancel confirmation pop-up window appears asking you if you want to save your changes.

**ATTENTION!** Even though the **Outlet** field is not marked with an asterisk to indicate that it is mandatory, it is a required value. Validation occurs when you click the **Save** button.

Manifest Window	
FIELD NAME (* = mandatory)	FIELD CHARACTERISTICS
Mailed By (Customer Number)	This numeric field is display-only and cannot be altered by the user. It identifies the Canada Post-assigned customer number of the customer that is preparing the mailing. It is the customer number associated with the login User ID.
Mailed On Behalf Of (Customer Number) *	Select from the drop-down list the number of the owner of the mail, even if it is the same as the Mailed By customer number. This numeric field identifies the Canada Post-assigned customer number of the customer who owns the mailing (i.e. customer on behalf of whom the mailing is being prepared). When the drop-down list is open, the corresponding customer names are also displayed.



	Note: Once items are assigned to a manifest (even if they are voided), the Mailed On Behalf Of customer number and Contract number cannot be modified as it may affect the validity of some of the items on the manifest.
Contract *	The drop-down list becomes populated with contract numbers, along with any aliases, associated to the chosen Mailed On Behalf Of customer number. Select the appropriate contract from the list.  Refer to note for Mailed On Behalf Of customer number.
Paid By Customer *	The drop-down list becomes populated with customer numbers, along with the customer names, that are valid payer partners of the chosen Mailed On Behalf Of customer number. This numeric field identifies the customer number of the customer who will be paying for the mailing. Select the desired customer number from the list.
Shipper Reference Number	Enter any reference number or code that you want to use to identify the shipment. Maximum of 15 characters.
Method of Payment *	Select from the drop-down list the method of payment for the transaction. Options are Account, Credit Card, and Metered. This field is defaulted to the preferred Method of Payment associated with the Paid By Customer, if any.  Note: Credit Card appears only if there is a contract chosen. Furthermore, if Credit Card is selected, the transaction will be processed ONLY IF the Mailed By and Paid By customer numbers are the same.
Selected Credit Card	This field becomes enabled when Credit Card is selected as the Method of Payment. Select from a drop-down list of existing credit card aliases (if any were previously set up), or choose Other to enter credit card information for one-time use (i.e. an alias is not created for later use). If Other is chosen, the Credit Card Data Entry window appears.
Outlet *	Select from the drop-down list the outlet to which mail is to be brought for induction into CPC's mail stream.  If you are viewing an existing manifest with attached items (even if all are voided), this field is display-only.  To add an outlet to the list of available choices, select Site Information from the Data Maintenance menu. Go to the Induction Point tab.
Manifest Name *	Enter a name for the manifest.
Manifest Type *	The drop-down list becomes populated with Manifest types associated to the selected Contract. Choose the desired type to identify the Manifest bundle.  If you are viewing an existing manifest with attached items (even if all are voided), this field is display-only.
Total Prepaid	Enter the number of shipment items that have been prepaid.
Destination PC	Enter the destination Postal Code for Commercial Air Stage Freight. This field is disabled for the other Service Types.
On Demand Pickup	Select this checkbox if you will call Canada Post for a pick up of your Priority Courier items. The appropriate charge is added to the manifest.

# Appendix A

## LABELS FOR SHIPPING AND DELIVERY SERVICES

Consult the following tables for an overall view 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/Etiquettes	Indicator/Indicateur
Purolator International Courier PuroLetter PuroPak	Purolator Bill of Lading Plain Paper/ Connaissance 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

Service (English / Francais)	Labels/Etiquettes	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