Electronic Shipping Tools Application (EST)

Unaddressed Admail

Desktop Version

Table of Contents

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 can 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.

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, 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 agree, 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 an "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

Creating an electronic Statement of Mailing is simple – there are seven steps involved in creating a Statement of Mailing. This application guides you in capturing customer information and your mail deposit, calculates your postage and prints your Statement of Mailing (SOM), reducing complexity and saving you valuable time.
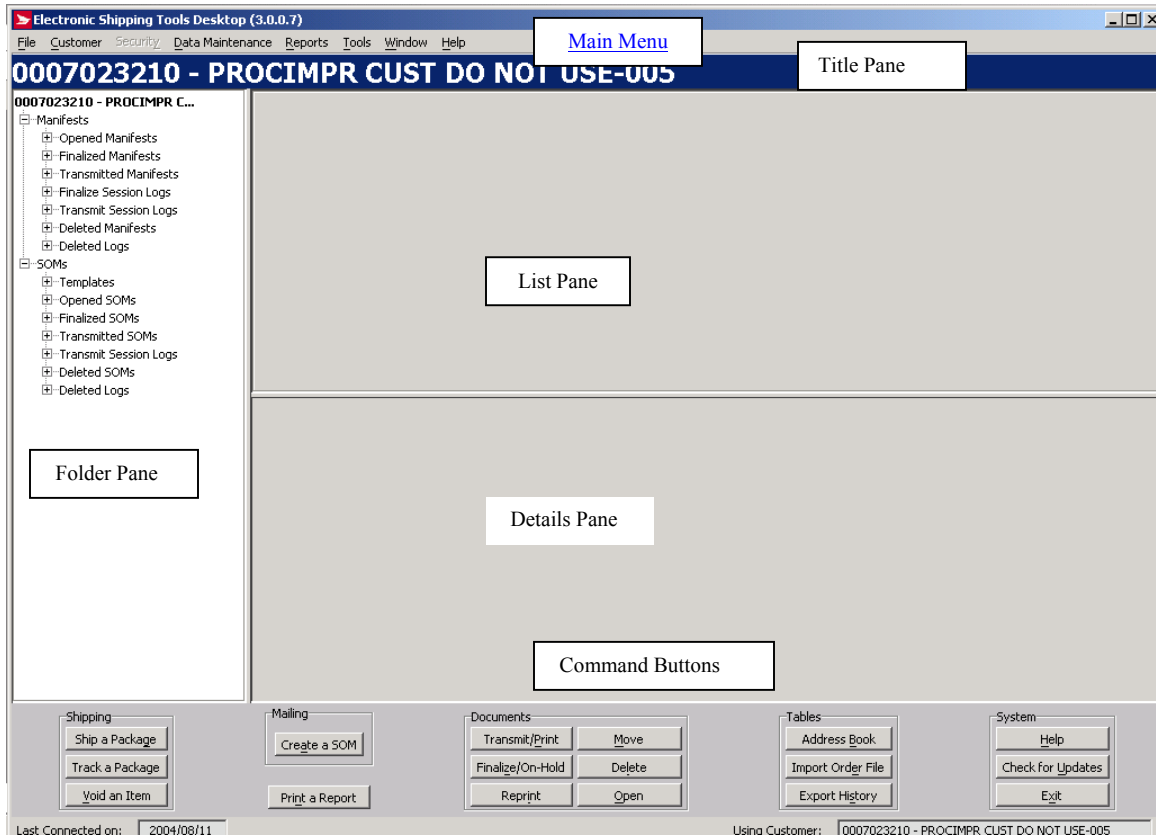
Main Menu

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 create a new SOM (for further details, please see Communications User Guide 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 Communications User Guide 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 Communications User Guide 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 Communications User Guide 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 Communications User Guide chapter 8)
- ❖ **Window Menu -** Use this menu to select from the open windows on the Electronic Shipping Tools application
- ❖ **Help** – Provides you with the tools required for completion of orders (for further details, please see Communications User Guide chapter 10).

3.0 Creating an Unaddressed Admail Statement Of Mailing (SOM)

The Admail Delivery Slip (ADS) functionality for Unaddressed Admail is a feature of Electronic Shipping Tools that allows you to capture the ADS information required to produce the ADS forms, the Distribution Plan and Container labels.

You may select to create an Unaddressed Admail SOM without Delivery Installation Details –

SOM Only

or, continue to create an Unaddressed Admail SOM with Delivery Installation Details –

Fully Featured

The steps involved in entering Unaddressed Admail data for the first time are as follows:

1. Select Unaddressed Admail from File, New SOM or click on the **Create a SOM** button, and then select Unaddressed Admail **SOM only** or Unaddressed Admail **Fully Featured**.

Note: Two options are available for Unaddressed Admail: Unaddressed Admail SOM without Delivery Installation Details (**SOM Only**) and SOM with Delivery Installation Details (**Fully Featured**). There is 2% automation incentive starting January 2005 for customers who use the Fully Featured option. Messaging will be provided on the invoice indicating the Fully Featured service had been used.

    a. **SOM only option:** You will provide a SOM only without associated forms / labels / reports (the print preview other similar functions, e.g. reports, are not included in this). DI Details buttons & fields, NPS Consolidation fields, E-mail Notification fields, Sort ADS Forms, Collate ADS forms, Mail Piece over 14" X 6" field and Print Container Label button will be disabled with this option. EST will include the appropriate contract price in the price calculation when you select this option

    b. **Fully Featured EST with incentive:** You will provide a SOM with all associated forms / labels / reports. As of January 2005, you will receive a 2% automation incentive for Unaddressed Admail orders when you complete all mailing plan details as required for the Fully Featured option. EST will include the "Fully featured" incentive in the price calculations for contract and non-contract customers. When you select Fully Featured, all mailing plan data and bar-coded documents must accompany the mailing, including:

        ➢ Statement of Mailing (SOM)

        ➢ Distribution Plan

        ➢ Packing Slips

        ➢ Unaddressed Admail Delivery Slips

        ➢ Container Labels

2. Enter your SOM data. (See section 3.1 and section 3.2 for the description of the fields)

Note: Fully Featured only:

Click the DI Details command button for the requested Service Description. If the *DI Details Entered* checkbox is checked, this indicates that ADS data already exists for the given Service Description. Both the command button and checkbox appear after you select a Service Description.

Refer to Chapter 4 for more details on how to complete steps 3 through 8 for Unaddressed Admail Fully Featured :

3. Select the Delivery Installation(s) for your Mailing Plan

4. Enter Delivery Installation Detail information. (Please see also section on Delivery Installations Defaults and Delivery Installations Split Walks)

5. Get Householder Count data online.

6. Delete or clear ADS data.

7. View Mailing Plan Summary.

8. Preview Unaddressed Admail SOM and Distribution Plan. If you have chosen the NPS Consolidation option, you can preview the NPS Consolidation report.

9. Verify SOM and Distribution Plan.

10. Transmit information to Canada Post.

11. Print SOM and Distribution Plan, Packing Slips, Summary of Mailing, ADS and Labels (see Section 5.5.1 Print SOM and Section 5.5.4 Other Unaddressed Admail Reports). If you have chosen the NPS Consolidation option, print NPS Consolidation report and Mono Label(s). If the Order is for multiple Deposit Locations, print Summary of Mailing and Packing Slip(s).

Admail Delivery Slips (ADS), SOMs and Distribution Plans can be printed on regular 8 ½ x 11-inch sheets of regular paper. To obtain the adhesive labels to print tie-on-tags and labels, please contact your Canada Post Representative, Commercial outlet or by calling our Business Hotline at 1-800-260–7678.

Assuming that your SOM data has already been entered, click the **DI Details** command button to create your Mailing Plan (Step 3).

3.1 Header Level Fields

In this section you will find general descriptions of fields that are presented in the Unaddressed Admail Data Entry window at the header level.

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

Mailed By (Customer Number) *

This numeric field is display-only and cannot be altered by the user. It identifies the CPC-assigned customer number of the customer that is preparing the mailing. When the SOM data entry window is accessed, this field is populated automatically with the user's Customer Number.

Mailed On Behalf Of (Customer Number) *

Select from the drop-down list the 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 opened, it includes both the Customer Number and Customer Name. When you make your selection, only the Customer Number is displayed.

Contract Number

Select from the drop-down list the Contract Number to be associated with the mailing. The Contract Number is defaulted to the one associated with the Mailed On Behalf Of Customer. However, you can select the Contract Number associated with the Mailed By Customer. If the Mailed On Behalf Of Customer selection is modified, then the Contract Number is changed to the one associated with the new Mailed On Behalf Of Customer.

Paid By Customer *

Select from the drop-down list the customer number of the customer who will be paying for the mailing. When the drop-down list is opened, it includes both the Customer Number and Customer Name. When you make your selection, only the Customer Number is displayed.

Outlet or Payment Outlet (Number and Name) *

For Unaddressed Admail SOM Only. Click the **Select** command button to select an outlet (number and name) where the mail is brought for induction into CPC's mail stream. A pop-up window allows the user to search for an Outlet by Province and City or by Outlet Number. Upon clicking on an Outlet, the user is returned to the SOM data entry window with the Outlet field appropriately filled (see Section 5.2.5 Select Outlet/Induction Point Window).

For Unaddressed Admail Fully Featured: This field is always called Payment Outlet. Select from the drop-down list the outlet at which payment will be made. This list is populated with all the outlets that were selected on the **Select Outlets/Deposit Locations** window (Data Maintenance > Site Information > Outlets/Deposit Locations tab > Add).

Method of Payment *

From the drop-down list, select your primary method of payment for the mailing. This field is defaulted to the preferred Method of Payment associated with the Paid By Customer (if any).

There are three valid methods of payment available:

Account – refers to a payment made by a customer to cover current and future mailings, which will be posted to the customer's account with CPC.

Metered - if the mailing will be paid by placing a meter impression on each item of mail to sufficiently cover the cost of mailing.

Credit Card - refers to a payment made by a customer to cover current and future mailings, which will be posted to the customer's credit card.

For Publications Mail, Catalogue Mail, Unaddressed Admail and International Incentive Letter-post, Metered is not a valid method of payment.

Selected Credit Card

This field becomes enabled and is mandatory if the Method of Payment is Credit Card. Select from the drop-down list the desired credit card with which to pay for the mailing.

Customer Reference Number

This is an alphanumeric field that can be used for your internal use and will appear on your Invoice/Transaction Record.

Mailing Type

For Unaddressed Admail SOM Only: Click on the "Full" radio button if entire mailing is deposited at one time. Click on the "Partial" radio button if the mail corresponding to the SOM will be inducted in multiple shipments over one or more days (not to exceed 5 days).

When "partial" is selected as the Mailing Type, the Date of Mailing and Shipment No. can be specified at the line item level.

For Unaddressed Admail Fully Featured: Mailing Type of Partial means that there are different Deposit Dates on the Delivery Installation Details pages AND at least one of the Details pages has the Deposit Location field DIFFERENT from the Delivery Installation field (this means that Transportation Required needs to be selected, because the mail is being brought from the Deposit Location to the Delivery Installation). An Order is determined to be Mailing Type of Partial by the application based on the data entered by the user. **This field is display-only.**

Note: *For partial mailings, you must pay for the entire mailing with the first deposit.*

Date of Mailing *

For Unaddressed Admail SOM Only: Enter the date when the mailing is to be inducted at CPC (format YYYYMMDD). This field has an impact on the calculation rules used by the application.

Note: *You will not be able to create and transmit your form with a mailing date that is prior to the current date.*

Continuous Inbound Freight (CIF)

Not applicable to International Incentive Letter-post and Basic International/USA Letter-post.

Check this box if your mail originates outside Canada and is to be delivered directly to a CPC plant. If the box is checked, you are required to provide CPC with documentation that shows proof of origin, such as a Canadian Customs document or Bill of Lading, in order to be exempt from Canadian sales taxes.

Number and Types of Containers

For Unaddressed Admail SOM Only: Enter the number of each type of container or bag (see below) used for this mailing. To ensure that your container or bag is acceptable, please contact your Canada Post representative or call our Business Access Hotline at 1-800-260-7678.

> **Monos**
>
> Enter the number of monotainers used to hold the mailing. A monotainer is a large, collapsible metal cage used to transport containers and/or brick-piled mail items between large volume mailers and postal facilities.
>
> **Skids**
>
> Enter the number of skids used to hold the mailing. A skid, also referred to as a pallet, is a wooden/plastic/aluminum platform for the conveyance of containers.
>
> **Flat Tubs**
>
> **For Unaddressed Admail SOM Only:** Enter the number of hard-sided Flats Tubs used to hold the mailing. A Flats Tub is a hard-sided container used primarily to transport large items (Oversize (O/S) mail).
>
> **Lettertainers**
>
> **For Unaddressed Admail SOM Only:** Enter the number of hard-sided Lettertainers used to hold the mailing. A Lettertainer is a hard-sided container used for the transport of small and medium items (Short and Long (S/L) mail).
>
> **Bags**
>
> Enter the number of fabrene or canvas bags used to hold the mailing
>
> **Boxes**
>
> Enter the number of boxes used to hold the mailing

For Unaddressed Admail Fully Featured: These four fields **Flats Tubs, Lettertainers, Bags, Boxes** are display-only. They are automatically calculated by the application using data entered on the Delivery Installation Details pages. They display the totals of each type of container used for the mailing.

Mail Pieces Over 14" X 6" (35.56 x 25.4 cm)

For Unaddressed Admail Fully Featured: When this check box is selected a validation will occur to ensure that all Delivery Installations related to the Statement of Mailing (SOM) have only the "Business" target area selected if there are any Letter Carrier Delivery Modes selected for this Delivery Installation.

SOM Reference

This is an alphanumeric field that can be used for your internal use and will appear on your Invoice/Transaction Record.

NPS Consolidation (optional)

For Unaddressed Admail Fully Featured: Mail presortation is the process of sequencing, grouping and containerizing the mail, and labelling the containers to allow CPC to bypass various processing steps and facilities within its mail distribution network.

The physical mail preparation process is facilitated when mail containers are pre-sorted to monotainers and skids. Select the NPS Consolidation option by checking the Presort Containers to Monos/Skids box. After checking the box, the three associated fields become enabled (Mono/Skid Type, Min No. and Max No. for Cont. per Mono/Skid). These fields are mandatory.

This sortation is based on Canada Post's National Presortation Schematic. You will be provided with documentation to support mail preparation.

3.2 Grid Level Fields

In this section you will find general descriptions of fields presented in the Unaddressed Admail Data Entry window at the grid level.

Enable Cost Centre Reference checkbox

When this checkbox is enabled, the **Cost Centre Reference** field will become available to enter reference data up to 30 characters in length.

Service Description *

Click on the empty field of the Grid column to display the drop-down list. Select Unaddressed Admail.

No. of Pieces *

For Unaddressed Admail SOM Only: Enter the total number of pieces being mailed for the Unaddressed Admail Service Description, making up part or all of the mailing issue

For Unaddressed Admail Fully Featured: The No. of Pieces field is display-only. This field will be populated by the application and derived by summing the Total Pieces Shipped for Delivery fields (from the Delivery Installation Details pages) associated to the given SOM line item.

Weight per Piece *

Enter the weight per piece for the specific line item. The weight is necessary to calculate postage costs.

Cost Centre Reference Field

This data captured in this field, up to 30 characters in length, appears on your electronic invoice file via PosteCS, allowing you to allocate costs internally at the line item level.

Transportation Required

For Unaddressed Admail SOM Only: Select the check box to indicate that the pieces for this given line require transportation to a different outlet that the deposit outlet.

Transport Pieces

For Unaddressed Admail Fully Featured: This field is display-only. It will be populated by the application and derived by summing the Total Pieces Shipped for Delivery values of those Delivery Installations for which the Transportation Required option has been selected.

Enter DI Details

For Unaddressed Admail Fully Featured: Once you select a Service Description, the **Enter DI Details** command button appears in this Grid column for the given line item. Clicking this button accesses the **Mailing Plan Summary** window, which in turn leads to the Delivery Installation Details pages, where you can enter information that will be used to automatically create delivery slips for your Unaddressed Admail mailing.

DI Details Entered? Indicator

For Unaddressed Admail Fully Featured: Once you select a Service Description, a checkbox appears in this Grid column for the given line item. This box is display-only and indicates whether or not Automated Delivery Slip (ADS) information exists for the SOM line item in question.

Date of Mailing

For Unaddressed Admail SOM Only: Select date from the drop-down calendar (you must click in the empty field to display the calendar) to identify the date when the mailing item is to be inducted at CPC. The Date of Mailing has an influence on the calculation rates.

Shipment No.

For Unaddressed Admail SOM Only: Enter a numeric identifier (maximum of three digits) for a grouping of line items mailed with:

- The same Outlet and Date of Mailing when Downstream Entry is selected

- The same Date of Mailing when only Mailing Type of Partial is selected

This field is always defaulted to 1 but can be altered by the user.

For a mailing that is to be deposited at the same Outlet but on different dates, the Shipment No. helps to keep track of which portions of the mailing have been received and later confirm that the whole shipment has been received by CPC.

For a mailing that is to be deposited at different Outlets, (it could be a combination of Deposit Locations and direct drop-offs, the Deposit Dates could be different), the Shipment No. helps to keep track of which portions of the mailing have been received and later confirm that the whole shipment has been received by CPC.

Price/Piece

A calculated field identifying the price of a piece of mail for a given line item. Display-only numeric field with five decimal places.

Price/kg ($)

A calculated field identifying the weight price associated with a given line item. Display-only numeric field with three decimal places.

Transportation Price/Piece

A calculated field identifying the transportation price of a piece of mail for a given line item. Display-only numeric field with four decimal places.

Postage

A calculated field identifying the total postage cost for the mail items of a given line item. Display-only numeric field with two decimal places.

GST/HST

A calculated field identifying the total amount of GST/HST taxes associated with the mail items of a given line item. Display-only numeric field with two decimal places.

PST

A calculated field identifying the total amount of PST taxes associated with the mail items of a given line item. Display-only numeric field with two decimal places.

Total Amount Due to CPC

A calculated field identifying the total amount due to CPC for the mail items of a given line item. The Total Amount Due is equal to the Postage plus the Adjustments and Taxes.

Sort ADS Forms for Printing

For Unaddressed Admail Fully Featured: Select one of the following radio buttons: Delivery Installation Postal Code (default), ADS Reference, or Title of Mail This field is used to specify how the ADS Sequential Number is generated and how the ADS forms and Container labels should be sorted when printed. See Section 5.3 Creating Admail Delivery Slips for Unaddressed Admail for ADS functionality.

Collate ADS Forms

For Unaddressed Admail Fully Featured: Select the collating order for your ADS forms.

3.3   Postage Calculation Summary

Postage

The sum of the Postage amounts on the Statement of Mailing (SOM).

GST/HST/PST

The sum of the tax amounts due for GST, HST and PST on the Statement of Mailing (SOM).

Net Amount Due

The total of the above.

3.4   Command Buttons

The following table describes the fields and Command Button

COMMAND BUTTON	RESULT OF INVOCATION
Select	• Not present on the SOM data entry window for Unaddressed Admail. • Enabled when entering or modifying a SOM or Template. • Opens the Select Outlet/Induction Point window.
New	• Enabled when entering or modifying a SOM or Template. • Opens the Cost Centres window. • Upon return to the data entry window, the newly created Cost Centre is displayed in the drop-down list if it is associated to the Mailed on Behalf of Customer Number selected.
Average Weight	• Opens the Weighted Average Weight Calculator window.
DI Details (Unaddressed Admail only)	• Appears in the DI Details column for a particular line item once a Service Description is selected. • Validates that a Mailing Date has been entered. Note that for SOMs where Partial Mailing has been selected, it is the Mailing Date associated to the given line item that is mandatory. If the validation fails, an error message is displayed. • Validates that the Mailing Date is less than or equal to the Householder Data Expiry Date. Note that for SOMs where Partial Mailing has been selected, the relevant Mailing Date is the one associated to the given line item. If the validation fails, an error message is displayed. • If validations are successful and ADS data exists, then displays the Mailing Plan Summary window. • If validations are successful and no ADS data exists, then displays the Select Delivery Installation(s) for Mailing Plan window.
Calculate	• Enabled when entering or modifying a SOM; at least one line item is required. • Initiates validations and generates price. • If pricing fails, an error message is displayed indicating the process error.

Preview	• Enabled when entering or modifying a SOM.
	• Initiates validations and generates price.
	• If pricing is successful then
	  • The SOM transaction is rated;
	  • The totals are displayed on the form;
	  • The SOM is saved and;
	  • The SOM Preview is created and displayed in the Report Preview window.
	• If pricing fails, an error message is displayed indicating the process error.

Finalize/On Hold	• Enabled when entering or modifying a SOM. • Performs the same process as the Finalize button on the Desktop window. • If the pricing process completes successfully, the data entry window is closed and the Desktop window is displayed; otherwise the data entry window remains open.
Transmit/Print	• Enabled when entering or modifying a SOM. • Performs the same process as the Transmit/Print button on the Desktop window. • Prior to transmission, a pop-up disclaimer message is displayed that is in line with the verification of the information provided to Canada Post. • If the Transmit/Print process completes successfully, the data entry window is closed and the Desktop window is displayed; otherwise the data entry window remains open.
Save	• If you are editing an existing SOM or Template, the SOM or Template is saved to its current location. • If you have created a new SOM, the SOM is saved in the Opened SOMs folder. • The SOM is saved with a status of Opened. Note: If you have created a new SOM Template, you must save it by choosing File, Save as Template from the Main Menu.
Clear	• Confirmation is required before all modifiable fields are cleared on the data entry window.
Close	• The data entry window is closed and the Desktop window is displayed. • If you have not yet saved your newly entered data or changes, asks if you want to save your changes or not. • If you have created a new SOM, a line item for it is created in the Opened SOMs folder.

4.0 Delivery Installation

4.1 Selecting Delivery Installation for Your Mailing Plan

For Unaddressed Admail Fully Featured

ADS data is entered for an associated line item on the SOM you have entered. To initiate ADS data entry, click the **DI Details** button next to the SOM line item in question from the Unaddressed Admail data entry window. This initiates the display of the **Select Delivery Installation(s) for Mailing Plan** window above if no ADS data exists.

The **Select Delivery Installation(s) for Mailing Plan** window allows you to search for delivery installation names based on the following search criteria: Province, Delivery Area and/or FSA/Postal Code. These fields are located at the top of the window. To initiate the search, click the **Search** command button.

Once the search results are returned, make your selection of the Delivery Installation(s) that will be added to the Mailing Plan. Multiple searches can also be performed in order to create your list of Delivery Installations.

1. Upon display of the **Select Delivery Installation(s) for Mailing Plan** window, an informational message is displayed (if the **DI Details** button was used to navigate to this window). This message window contains a "Don't show me again" checkbox, and **OK** button and the following message text:

   "You must first select the Delivery Installations. Once this step is completed, you can enter the detailed delivery instructions for each Delivery Installation selected. Consult Help for further information and printer requirements."

   If the user checks the "Don't show me again" checkbox, then this message will not be displayed again.

   You can search for Delivery Installation names as follows. First select a Province from the drop-down list. You can filter the search even more by entering a Delivery Area and/or FSA/Postal Code. Partial searches on Delivery Area name and FSA/Postal Code are also supported. For example, entering "C" only for Delivery Area would result in all Delivery Installations that service Delivery Areas that begin with the letter "C" for the Province in question. Entering just "K" for FSA/PC would result in all FSA/PC's beginning with the letter "K" for the Province in question. At a minimum, one search criterion must be specified. However, more than one search criterion can be entered.

   Note: You can do a search with only the Province. However, your list of results may be too long. You can also perform a search with just entering either the Delivery Area name or FSA/PC.

   Search criterion is not case-sensitive. Even if you type lower-case letters in the FSA/PC field, they are immediately converted to upper-case letters.

2. Delivery Installation Name(s) that match the search criteria are listed alphabetically in the Search Results list.

3. You can highlight one or more Delivery Installation Name(s) in the Search Results list and click the **Add >** button in order to add the selected Delivery Installation(s) to the Mailing Plan. The **Add All >>** button is enabled when the Search Results list is populated. The **Add >** button is enabled when you make one or more selections.

   Note: You can use the <SHIFT> key to select a block of records in the Search Results list. You can use the <CTRL> key to select non-adjacent records.

4. To remove one or more Delivery Installation Name(s) in the Delivery Installation(s) Added to Mailing Plan list, highlight one or more Delivery Installation Name(s) and click the **< Remove** button. The **<< Remove All** button is enabled when the Delivery Installation(s) Added to Mailing Plan list is populated. The **< Remove** button is enabled when you make one or more selections.

   Note: If you attempt to remove a Delivery Installation that was previously selected and has user-entered data associated to it, then an error message will be displayed to inform you that all associated Delivery information will be deleted.

5. The Delivery Installation Name(s) in the Delivery Installation(s) Added to Mailing Plan list is sorted in the order that the Delivery Installations are selected.

6. From this window, you can also import Delivery Installations data by clicking the **Import** button. For complete details, see Section 5.3.5 Import Delivery Installations Data.

- The **Import** button displays the **Open File – Import Delivery Installations Data** window. This file location window allows you to select a CSV file to import the ADS data that should be associated to the given SOM line item.
- If the Delivery Installations data was imported, then the Delivery Installation(s) Added to Mailing Plan list should be pre-populated with the Delivery Installation Names from the import file.

Notes: The import file does not contain the actual Delivery Installation Name, but contains the Delivery Installation Postal Code that can then be uniquely mapped to the corresponding Delivery Installation Name.

You can add a Delivery Installation to the same Mailing Plan more than once. One situation that requires this is when you want your mail to be transported from the same Deposit Location but on different Deposit Dates. Hence you need a Delivery Installation Details page, with the same Delivery Installation, for each Deposit Date. In such a case, the application does give you a warning message.

If you remove imported Delivery Installation Names from the Delivery Installation(s) Added to Mailing Plan list, these do NOT appear in the Search Results list.

Once the Unaddressed Admail data is entered for an associated line item on the SOM page, click the **Enter DI Details** button to initiate delivery installation data entry. The **Select Delivery Installation(s) for Mailing Plan** page below appears if no ADS data exists.

The **Select Delivery Installation(s) for Mailing Plan** window allows you to search for delivery installation names based on the following search criteria: Province, Delivery Area and/or FSA/Postal Code. These fields are located at the top of the window. To initiate the search, click the **Search** command button.

Once the search results are returned, make your selection of the Delivery Installation(s) that will be added to the Mailing Plan. Multiple searches can also be performed in order to create your list of Delivery Installations.

You can add a Delivery Installation to the same Mailing Plan more than once. One situation that requires this is when you want your mail to be transported from the same Deposit Location but on different Deposit Dates. Hence you need a Delivery Installation Details page, with the same Delivery Installation, for each Deposit Date.

Once the list is complete, click the **Apply** command button. This will populate the Delivery Installation Detail pages with the names of each of the Delivery Installations selected. The Delivery Installation Detail page(s) will be displayed in the same order as in the Delivery Installation(s) Added to Mailing Plan list.

Command Buttons

The following table describes the Command Button definitions.

COMMAND BUTTON	RESULT OF INVOCATION
Search	- Enabled when data has been entered in at least one search criteria field. - Generates and initiates a query based on the search criteria entered. - If no Delivery Installations are found that match the search criteria, then a message is

COMMAND BUTTON	RESULT OF INVOCATION
	displayed. • If one or more Delivery Installations are found, then list them in the Search Results list.
Add >	• Enabled when one or more Delivery Installation Name(s) are highlighted. • Adds the selected Delivery Installation Name(s) to the Delivery Installation(s) Added to Mailing Plan list.
< Remove	• Enabled when one or more Delivery Installation Name(s) are highlighted. • Removes the selected Delivery Installation Name(s) from the Delivery Installation(s) Added to Mailing Plan list.
Add All >>	• Enabled when the Search Results list is populated. • Adds all the Delivery Installation Names from the Search Results list to the Delivery Installation(s) Added to Mailing Plan list.
<< Remove All	• Enabled when the Delivery Installation(s) Added to Mailing Plan list is populated. • Removes all the Delivery Installation Name(s) from the Delivery Installation(s) Added to Mailing Plan list back to the Search Results list (except if they are imported Delivery Installation Names).
Split Walk Report	• Opens a preview window that gives the complete Target Area of the delivery mode; identifies prior to the mailing, which route should be selected to have a complete walk; Shows that the Delivery Installation Details have been completed correctly.
Import	• Opens the Open File- Import Delivery Installation Data window. See Section 5.3.5 Import Delivery Installations Data.
DI Defaults	• Makes it easier to complete the information for Unaddressed Admail mailings and the associated Delivery Installations targeted • Enabled when the delivery installations added to the Mailing Plan list contains at least one delivery installation (DI) name • Allows definition of the DI Defaults that will apply to the entire mailing plan and eliminates the need to navigate through each of the delivery installations pages for a new mailing plan
Apply	• Applies the selected Delivery Installation Name(s) to the Delivery Installation Details page(s). Each Delivery Installation Name is associated to one page. • Closes the Select Delivery Installation(s) for Mailing Plan window and displays the first Delivery Installation Details page.
	▪
Cancel	• Closes the window. No confirmation is requested.

4.2   Delivery Installation Defaults

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Clicking on the DI Defaults button on the Select Delivery Installation(s) for Mailing Plan screen displays the new Delivery Installation Defaults page.
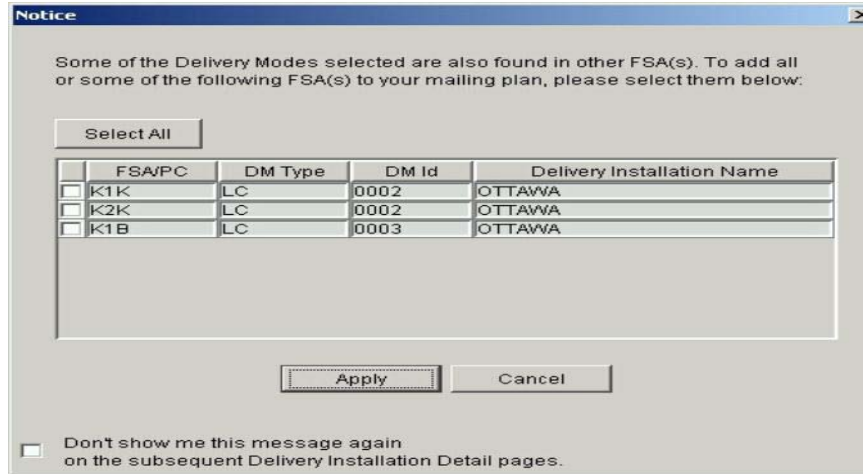
This page allows completion of the information that will apply to **all** of the *Delivery Installation (DI) Details* pages defined in the mailing plan.

As this will apply to all of the delivery installations, the *Delivery Installations* field on this screen is disabled. All other fields are accessible to edit. The functions are identical to those on the *Delivery Installation Details* page.

By clicking on *Apply*, the information provided on this page will be applied to **all** Delivery Installations (DI) associated with the Statement of Mailing (SOM) line item selected.

4.3   Delivery Installations Details – Split Walks
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A letter carrier route may consist of more than one FSA. This is referred as a "split walk". You can select the FSA within the split walk route you wish to have covered. Once you have select either the 'Get Counts' button or the 'Get Count for all Delivery Installations' button on the Delivery Installation Detail page and if you have selected any Delivery Modes and Delivery Mode IDs that contain a "split walk", a Notice page will pop-up on the screen. The Notice page gives you the opportunity to select the certain FSA's or all FSA's you wish to add to your mailing.

Command Buttons

The following table describes the Command Button definitions.

COMMAND BUTTON	RESULT OF INVOCATION
Select All	• Select all of the FSA that are showing in the table.
Apply	• The FSA that were chosen will be added to the delivery route of the letter carrier.
Cancel	• Closes the window. Process the "Delivery Installation Details" page.
Don't…again	• The 'Don't….again' checkbox is available should you not want this message to appear on each subsequent Delivery Installation Detail Page. This checkbox is only enabled when you select ' Select All' and it is disabled if you only select certain FSA's

4.4   Enter Delivery Installation Details
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The Delivery Installation Details page captures the detailed data by Delivery Installation required for the Unaddressed Admail Delivery Slips. As well, this page performs online queries against the Householder Count data.

This window can be divided into seven sections:

* SOM Information
* Delivery Information
* Delivery Timing
* Target Area
* Select Delivery Modes (DM)
* Get Counts (Householder)

Command Buttons at the bottom of the page which allow you to View Mailing Plan / Delete / Finish / Clear or move backward or forward to other pages

SOM Information - The SOM Information section contains display-only information (Service Description and Weight) as captured from the SOM line item in question.

Delivery Information - This section requires you to provide details on your mailing. An asterisk indicates that the field is mandatory.

Delivery Installation – pre-populated from the Select Delivery Installation(s) for Mailing Plan function. This field is display-only and identifies the Delivery Installation Name of the Delivery Installation in question.

Deposit Location * - if you are not directly dropping off your mail at the Delivery Installation in question, select from the drop-down list the outlet where you are leaving your mail. Another outlet may be more convenient (e.g. in your vicinity) at which to leave your mail. CPC then needs to transport your mail from the Deposit Location to the Delivery Installation. **If you set the Deposit Location different from the Delivery Installation, then you must select the Transportation Required option.**

This field defaults to the Payment Outlet selected on the Unaddressed Admail data entry window (since the Transportation Required option initially defaults to being selected). The drop-down list is populated with all the outlets that were selected on the **Select Outlets/Deposit Locations** window (Data Maintenance > Site Information > Outlets/Deposit Locations tab > Add), along with the Delivery Installation in question.

The Deposit Location selected (if different from the Delivery Installation) factors into CPC's decision of whether it can meet the Delivery Timing specified by you.

Attention: If you set the Deposit Location equal to the Delivery Installation, the Transportation Required checkbox do NOT automatically become deselected.

Transportation Required – this checkbox is defaulted as selected. Select this option if you set the Deposit Location different from the Delivery Installation. This means that you are dropping you mail off at an outlet different from the Delivery Installation in question, and thus CPC needs to transport your mail from this outlet to the Delivery Installation. **If you select the Transportation Required option, then you must set the Deposit Location different from the Delivery Installation.**

Attention: If you deselect the Transportation Required option, then the Deposit Location automatically changes to be the same as the Delivery Installation.

Consumers' Choice - this box is defaulted as selected when the Delivery Installation Detail page is first displayed for a particular Delivery Installation. It is used to identify your target area with respect to those customers who do not wish to receive Unaddressed material (i.e. Consumers' Choice or Total Points of Call).

Version Specific - click this box to identify that the mailing has several versions (e.g. different store addresses appear on mail pieces that are otherwise the same). The 'Title of the Mail Piece' remains a mandatory field. When 'Version Specific' is selected, the 'Version Specific' and 'Title of the Mail Piece' fields are disabled on the subsequent

Delivery Installation Details pages. Each different version must be entered on separate lines at the Statement of Mailing (SOM) Data Entry page.

Title of Mail Piece * - enter a descriptive name or title of the mail pieces for easy identification.

ADS Reference #1 – this is a user-defined field whereby you can enter your own reference number, such as an internal tracking number (maximum of 20 characters).

ADS Reference #2 - this is another user-defined field whereby you can enter your own reference number, such as an internal tracking number (maximum of 20 characters).

Container Type * - select from the following drop-down list choices: Bag, Box, Flats Tub and Lettertainer.

Pieces per Bundle * – enter the number of pieces in a non-standard bundle size. **The value must be less than or equal to 200.** Otherwise you get an error message when you try to leave the page.

Bundles per Container * – enter the number of bundles per container/bag being shipped to the Delivery Installation. If you wish to use two or more different types of containers, you will be required to manually modify/edit the Bundles per Container information on the Delivery Installation page(s) concerned or create a separate line item on the SOM for the different container.

No. of Containers – this is a calculated field. The user cannot alter it. No. of Containers/Bags being shipped to the Delivery Installation = No. of Complete Bundles / Bundles per Container (rounded to the next full value, if not fully divisible).

No. of Complete Bundles – this is a calculated field. The user cannot alter it. No. of Complete Bundles = Total Counts for all DM's selected / Pieces per Bundle (rounded to the next full value).

Pieces in Residue Bundle – this is a calculated field. The user cannot alter it. Pieces in Residue Bundle = value left over from No. of Complete Bundles calculation if Total Counts is not fully divisible by Pieces per Bundle.

Delivery Timing * – Automatic calculation of the Delivery Timing will help the user to adjust his mailing plan to ensure that his desired initial Start Date can be respected.

Upon Receipt – click this radio button to identify that the delivery can start upon receipt of mailing. You must enter the Deposit Date (i.e. when you will leave your mail either directly at the Delivery Installation in question or at the Deposit Location chosen).

Deposit Date – enter the date (YYYYMMDD) when you will leave your mail either directly at the Delivery Installation in question or at the Deposit Location chosen. This field is mandatory if you select the Upon Receipt option.

Latest Start Date- if the Upon Receipt option is chosen, this field is calculated by the application based on the Deposit Date entered and Canada Post's service standards.

Specific Start Date – click this radio button if you want the delivery to start on a specific date. You must enter this desired Start Date.

Start Date – enter the specific date (YYYYMMDD) on which you want delivery of your mail to start. This field is mandatory if you select the Specific Start Date option.

Required Start Date – if the Specific Start Date option is chosen, this field is calculated by the application based on the Start Date entered and Canada Post's service standards.

> **Notes:** If you select either Upon Receipt and enter a Deposit Date or Specific Start Date and enter a Start Date, but then change your mind and select the other radio button, you must manually clear the Date field associated with the first radio button chosen.
>
> If Canada Post cannot accommodate the Start Date specified by you, you will get the following message to inform you that "It is not possible to accommodate the specified Start Date according to CPC's Service Standards. Please enter a Start Date that is at least <calculated number> business days from today's date." You can either change your Start Date or your Deposit Location or a combination of both for Canada Post to meet your requirements.

Target Area- This section allows you to select the type of Target Area for your mailing. At least one Target Area selection must be checked.

Houses - select if delivery is required to houses. A house is a building with one or two dwelling units. If a business is operated in a house that is also used as a dwelling, it is classified as a house.

Apartments - select if delivery is required to apartments. An apartment is a self-contained dwelling unit within a multiple unit residential building of three or more such dwelling units in which: all the units share a common main entrance and civic address but have individual suite numbers. For the purpose of this definition, common entrance means entrance to the building or to the complex (e.g. private lane or road). For urban areas, each unit has a

separate mail receptacle, which normally forms part of a centralized mail receiving facility. If a business is operated in an apartment that is also used as a dwelling, it is classified as an apartment.

Farms - select if delivery is required to farms. A farm is a dwelling or a point of call associated with a tract of land used to raise crops, animals or fish as a source of income or revenue.

Businesses - select if delivery is required to businesses. A business is defined as a point of call where the primary activity is commercial or industrial. If a business is operated from a house or an apartment, which is also used as a dwelling, it is classified as a house or an apartment.

For more information, please consult the Canada Post Guide.

Select Delivery Modes (DM) - This section allows you to select the Delivery Mode(s) you wish to target. The Select Delivery Modes (DM) grid on this page contains only 20 line items for data entry since the ADS report can accommodate only 20 route ranges.

FSA/PC - select from the drop-down list the Forward Sortation Area (FSA) or Postal Code (PC) for the delivery mode selected. The FSA is the first three characters (alpha-numeric-alpha) of the postal code, which represent a geographic area.

For urban Delivery Installations, the FSA/PC drop-down list for Delivery Installation contains only the FSA's available for the Delivery Installation selected. The 'ALL' value at the top of the list allows you to select all FSA's available within the Delivery Installation.

For rural Delivery Installations, the FSA/PC drop-down list for Delivery Installation contains the list of Postal Codes for that installation as recorded in the Householder data, as well as an 'ALL' value at the top of the list.

DM Type - select from the drop-down list the DM Type. The DM Type drop-down list contains the list of all DM Types (e.g. Letter Carrier (LC), Rural Route (RR)) available for the Delivery Installation selected. The 'ALL' value at the top of the list allows you to select all DM types available within the Delivery Installation.

Should the FSA/PC field be blank, the DM Type drop-down list will also be blank. Should the FSA/PC field be modified, the value in the DM Type field will automatically be reset to reflect the new FSA/PC selected.

DM ID From / DM ID To – select from the drop-down lists the DM ID. If you wish to enter a range, then select your starting point "DM ID From" and your end point "DM ID To". For example, you may enter a range of LC 0001 – 0009. If you are selecting only one DM ID, you need to select this value in both the DM ID From and DM ID To fields.

The DM ID From and DM ID To drop-down lists contain only the ID's available for the Delivery Installation selected. The 'ALL' value at the top of the list allows you to select all the DM ID's available within the Delivery Installation you have selected.

Should the DM Type field be blank, then the DM ID drop-down lists will also be blank. Should the FSA/PC or DM Type fields be modified, the value in the DM ID fields will automatically be reset to reflect the new FSA/PC and/or DM Type selected.

Note: *Ranges maximize available space on the Unaddressed Admail Delivery Slip.*

Delivery Installation Name – select from the drop-down list the abbreviated name of the postal facility that will provide the delivery services for the selected delivery mode. The Delivery Installation Name drop-down list contains the list of Secondary Delivery Installation Names for the Delivery Installation selected, and has an 'ALL' value at the bottom of the list. The Delivery Installation Name drop-down list is filtered by the selected FSA/PC, DM Type and DM ID's. If a "DM ID From" and "DM ID To" have not been selected, then this drop-down list is blank. Should the FSA/PC, DM Type or DM ID fields be modified, then the Delivery Installation Name field will automatically be reset to reflect the new FSA/PC, DM Type or DM ID's selected. All information is as recorded in the Householder data.

If 'ALL' is selected for both the DM Type and DM ID From fields, the system will automatically populate the DM ID To and Delivery Installation Name fields with 'ALL' (this will be the only value available in the drop-down list).

If the Delivery Installation Name list contains only one value (i.e. one value other than 'ALL'), then the system will automatically populate the Delivery Installation Name field with this Delivery Installation Name. If the Delivery Installation drop-down list contains two or more values, then you must select the appropriate Delivery Installation Name. Where a range of DM ID's is entered for which more than one Delivery Installation Name can apply, then the Delivery Installation Name drop-down list will only contain the DI's that are common to all DM's selected.

4.5   Get Householder Counts
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Online queries against the Householder Count data can be performed by capturing the target area data, selecting the required route data (i.e. FSA/PC, DM Type, DM ID and Delivery Installation Name) and clicking the **Get Counts** button. The **Get Counts** button invokes a query on the Householder data and retrieves the counts for the specified target area, route selection and count type (e.g. Consumers' Choice vs. Total Points of Call). Note that if a range of routes was entered (e.g. A9A LC 0001-0009), the Householder data will be summed over that range.

Total Counts - These fields represent the total amount Delivery Mode (DM) at the line level. You have the choice to modify the "Total Counts" data at the Delivery Mode (DM) line level if you select to change the "Total Counts", a pop-up

message will warn you that the value differs from the Householder count. The system displays the modified value in a different font color and disables the "Total Pieces Shipped for Delivery field".

Total Pieces Shipped for Delivery - The Total Pieces Shipped for Delivery field represents the sum of the Total Counts for all DM's selected. It identifies the total number of items being shipped for delivery to the Delivery Installation and is a mandatory field. You have the choice to modify the Total Pieces Shipped for Delivery. The system displays the modified value in a different font color and disables the "Total Counts". If you select to change the "Total Pieces Shipped for Delivery", a pop-up message will warn you that the value differs from the Householder count.

(Page) X of Y (bottom-right corner) – identifies which Delivery Installation Details page you are currently working on and the total number of Delivery Installation Details pages.

Command Buttons

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

COMMAND BUTTON	RESULT OF INVOCATION
Get Counts	• Enabled when there is one complete line item in the Select Delivery Modes (DM) grid. • Invokes validations. • Used primarily to derive the counts for the current Delivery Installation. • If count data does not exist for the given mailing date and complete route range entered for a Delivery Mode line item, then an error message is displayed. • If validations are successful, the page is refreshed and count data is displayed. Note that if the DM From Id equals 'All', the system populates the DM From Id with the smallest DM Id number and the DM To Id with the largest DM Id number for the given FSA and DM Type combination.
Get Counts for all Delivery Installations	• Invokes validations. • Used primarily after a successful import of an ADS file followed by the manual addition of more Delivery Installations. • If count data does not exist for the given mailing date and complete route range entered for a Delivery Mode line item, then an error message is displayed. • If validations are successful, the page is refreshed and count data is displayed. Note that if the DM From Id equals 'All', the system populates the DM From Id with the smallest DM Id number and the DM To Id with the largest DM Id number for the given FSA and DM Type combination.
View Mailing Plan	• Get Counts functionality must have already been invoked. • Invokes validations. • If a route contains a Split Delivery Mode indicator, then displays an error message. Note the 'other FSA' (i.e. other half of the route) can be found by searching for another record in the Householder data for that Delivery Installation which has the same DM Type, DM Id and Delivery Installation (abbreviated) Name. • If a route contains a Split FSA indicator, then displays a warning message. • If validations are successful, the Mailing Plan Summary window is displayed and calling Delivery Installation Details page is closed. • When you click Close on the Mailing Plan Summary window, you are returned to the Delivery Installation Details page.
Delete	• Displays warning message to confirm deletion. • If warning message is confirmed, deletes the Delivery Installation (DI) Details data and displays the next DI Details window.
Finish	• Gets Counts functionality must have already been invoked. • Invokes validations. • If a route contains a Split Delivery Mode indicator, then displays an error message. Note that complete coverage of a Delivery Mode is required. • If a route contains a Split FSA indicator, then displays a warning message. • If Delivery Installation Details pages exist with no user-entered data, then displays a warning message. If the user presses Cancel on the warning message window, then the Finish process continues with the exception that instead of displaying the SOM data entry window, the Mailing Plan Summary window is displayed. • If validations are successful, saves data, closes the Delivery Installation Details page and displays the SOM data entry window.

COMMAND BUTTON	RESULT OF INVOCATION
	• If you click on the Finish button and there are Delivery Installation Details pages for which the user has not entered any data, a warning message will be displayed indicating that the associated Delivery Installations will be deleted from the mailing plan. • The close page function, that is the 'X' icon at the top of the page, has the same functionality has the Finish button.
Cle<u>a</u>r	• Asked to confirm whether you wish to clear the page. • If you click OK, the page is refreshed, all fields on the data entry page are cleared and the cursor is positioned on the first field. • If you click Cancel, then no changes are made to the data entry page.
Links to other Delivery Installation Details pages: • |< (Go to the first page) • < (Go to the previous page) • > (Go to the next page) • >| (Go to the last page)	• Get Counts functionality must have already been invoked. • Invokes validations. • If validations are successful, displays selected Delivery Installation (DI) Details page. Note that the system also defaults the following fields (i.e. applies data from previous window) if they do not already contain data: selection of Transportation Required option, Delivery Timing selection along with associated Deposit/Start Date, Version Specific, Title of Mail Piece, ADS Reference #1 and #2, Container Type, Pieces per Bundle, Bundles per Container, Coverage and Piece Description. If Transportation Required is not selected, the Deposit Location defaults to the Delivery Installation in question. If Transportation Required is selected, the Deposit Location defaults to the Payment Outlet selected on the Unaddressed Admail data entry window.

4.6   View Mailing Plan Summary

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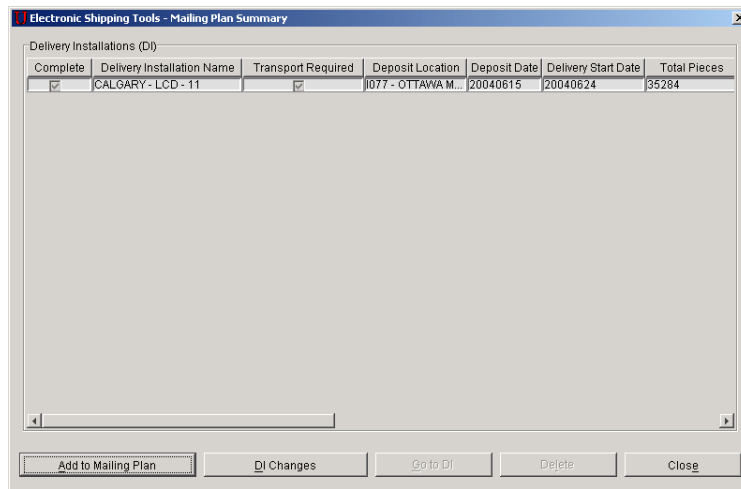
The **Mailing Plan Summary** window allows the user to view a list of the Delivery Installations in the Mailing Plan, access the **Select Delivery Installation(s) for Mailing Plan** window, navigate to a particular Delivery Installation and delete multiple ones (use the <CTRL> and/or <SHIFT> keys to select multiple records). It can now be easily sorted in ascending or descending order by clicking on the header of any column. Click once for ascending, and twice for descending sort order. The **Mailing Plan Summary** window is displayed in a pop-up window. Upon closing the **Mailing Plan Summary** window, you will be returned either to the Unaddressed Admail data entry window or a Delivery Installation Details page (depends from where the **Mailing Plan Summary** window was invoked). You are now ready to preview your SOM.

All of the fields on this window are display-only. To change a field for a given Delivery Installation, highlight the line item and click the **Go to DI** button.

Complete – this checkbox indicates whether mandatory ADS data already exists for the Delivery Installation in question.

Delivery Installation Name – this field identifies the Delivery Installation Name in question. It corresponds to the Delivery Installation Area Name, Delivery Installation Type description and Delivery Installation Qualifier Name.

Transport Required – this checkbox indicates whether transportation is needed for the mailing. This means that you are not dropping off your mail directly at the Delivery Installation in question, but at another Outlet (i.e. Deposit Location). Thus CPC will charge you for transporting the mail from the Deposit Location to the Delivery Installation.

Deposit Location – this field identifies the Outlet where you will drop off your mail for the Delivery Installation in question. If it is equal to the Delivery Installation in question, then it is a direct drop-off (and the application does not consider the Delivery Installation as having a Deposit Location). If it is different from the Delivery Installation, then CPC needs to transport the mail from the Deposit Location to the Delivery Installation.

Deposit Date – this field identifies the date when you will drop off your mail for the Delivery Installation in question (either at the Delivery Installation itself or at another Deposit Location). This date is either manually entered by the user (because the mailing is to start upon receipt) or calculated by the application based on CPC's standards (because the user wants the mailing to start on a specific date).

Delivery Start Date – this field identifies the date when CPC will start to distribute the mailing for the Delivery Installation in question. This date is either calculated by the application (because the user had manually entered a Deposit Date) or manually entered by the user because he wants the mailing to start on a specific date.

Total Pieces Shipped for Delivery – this field identifies the total number of pieces being shipped for delivery to the Delivery Installation in question.

Title of Mail Piece – this field identifies a descriptive name or title of the mail piece for easy identification.

Command Buttons

The following table describes the fields and Command Button

COMMAND BUTTON	RESULT OF INVOCATION
Add to Mailing Plan	• Displays the Select Delivery Installation(s) for Mailing Plan window and closes the Mailing Plan Summary window to allow for additional Delivery Installations to be included in the Mailing Plan.
DI Changes	• Enabled when the list contains one or more Delivery Installations • Basic information such as the Title of the Mail Piece, Target Area, and Container Type, on the Delivery Installation Mailing Plan Changes page can now be easily changed and applied to all Delivery Installations.
Go TO DI	• Enabled when one or more Delivery Installations are selected from the list. • Displays the Delivery Installation Details page for the selected Delivery Installation and close the Mailing Plan Summary window.
Delete Selected DI's	• Enabled when one or more Delivery Installations are selected from the list. • Display warning message to confirm deletion of data. • If warning message is confirmed, deletes the Delivery Installation Details data and refreshes the window.
Close	• Closes the window. Returns you to either the Unaddressed Admail data entry window or a Delivery Installation Details page (depending from where the Mailing Plan Summary window was invoked).

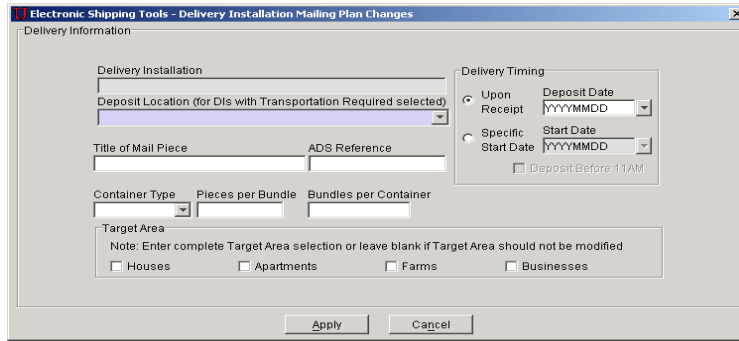# 4.7 Delivery Installation Global Changes

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A new *DI Changes* button is available and enabled on the Mailing Plan Summary page when the list contains at least one Delivery Installation.

This means the basic information on the new *Delivery Installation Mailing Plan Changes* page can now be easily changed and applied to **all** Delivery Installations. This includes information such as:

Title of the Mail Piece
Target Area
Container Type
Clicking on the *DI Changes* button displays the new *Delivery Installation Global Changes* page.

This page allows global changes to be made to already define mailing plans that are then applied to each Delivery Installation.

Changes made to the following fields will be applied to **all** Delivery Installations included in the mailing plan:

- Deposit Date
- Start Date
- Title of mail Piece
- ADS Reference #1 / #2
- Container Type
- Pieces per Bundle
- Bundles per Container
- Target Area (Houses, Apartments, Farms, Businesses)

NOTE: This functionality is not available when the DI Details have been imported for one or more Delivery Installation in the mailing plan.

4.8   Import Delivery Installation Data

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The Import Delivery Installation Data unit task allows you to:

- Select a comma delimited (.csv) file containing a list of Delivery Installation Delivery Mode selections;

- Import this Delivery Installation Data file in the opened SOM against the selected SOM line item and;

- Save the records with errors in an Error file, with error messages in English and French.

Note: Only delimited ASCII files can be imported. The default delimiter is a comma. Users can specify their own delimiter from the Open File – Import Delivery Installation Data window. Other valid delimiters are semi-colon (;), single quote ('), pipe (|), percent (%), colon (:), tilde (~), caret (^), and underscore (_).

The Import Delivery Installation (i.e. ADS) Data functionality is accessed through the Import button on the Select Delivery Installation(s) for Mailing Plan window. Clicking the Import button results in the Open File – Import Delivery Installation Data window being displayed.
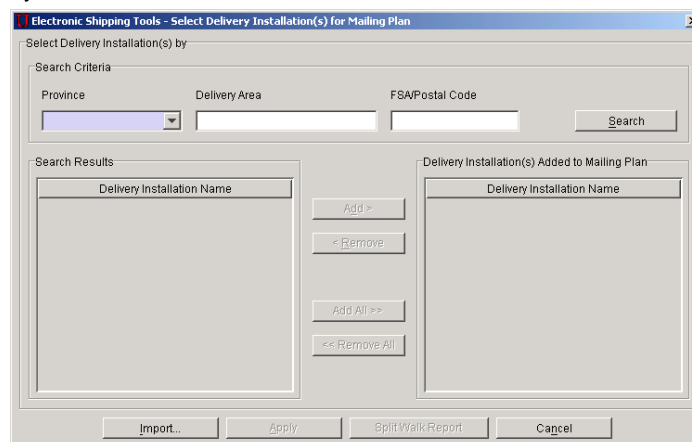
From the Open File – Import Delivery Installation Data window, select the file to be imported. If the file has been successfully imported, a message with an OK button will be displayed indicating that the process has been completed. Once you click OK, the Select Delivery Installation(s) for Mailing Plan window will be refreshed with the Delivery Installation(s) Added to Mailing Plan list populated with the Delivery Installation Names corresponding to the imported data (and in the same order as they each appear in the import file). If you click on the Apply button, the Delivery Installation Detail page is displayed and populated with the Delivery Mode data imported for the first Delivery Installation.
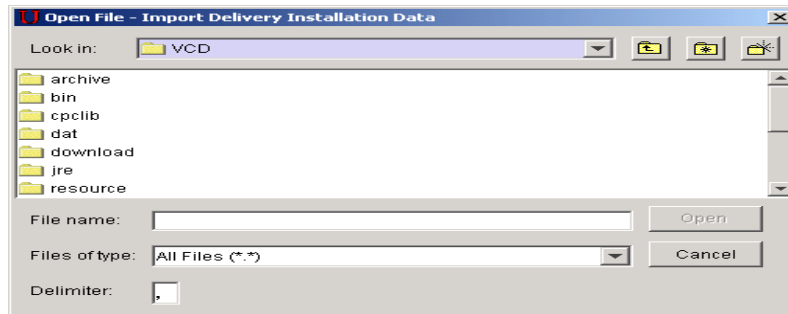
During the import process, if one of the field validations fails, then an error file is created. At the end of this import process, a message is displayed to inform you that there were records rejected at time of validation. Click the OK button on the message dialogue box, then the Save As –Delivery Installation Data Import Error window is opened in order to save the error file. If you click the Cancel button on the message dialogue window, a message is displayed to inform you that the process of saving rejected Delivery Installation Delivery Mode records has been cancelled.

Next the Select Delivery Installations for Mailing Plan window will be displayed with the Delivery Installation(s) Added to Mailing Plan list view populated with the Delivery Installation Names corresponding to the imported data (and in the same order as they each first appear in the import file).

If the imported data is being applied to a SOM line item, which already has Delivery Installation Detail data created; the import will create distinct Delivery Installation Detail records. That is, if delivery mode (route) data is being imported for a Delivery Installation that already has delivery mode information recorded against it, the import will not append this data to it; instead it will record this data on a separate Delivery Installation Detail page.

Open File – Import Delivery Installations Data Window

This window has the same layout and functionality as the standard Windows Open File window. The default file type is Text (*.txt) but you can select any file (*.*). The Open command button triggers the Import Delivery Installations Data process. If the file is not found, a message will be displayed, requesting to open another file. You can specify the type of file delimiter used in the import file. Valid delimiters are: semicolon (;), single quote ('), comma (,), pipe (|), percent (%), colon (:), tilde (~), caret (^), and underscore (_).

Save As –Delivery Installation Data Import Error File Window

This window has a similar layout and the same functionality as the standard Windows Save As window.

File Layout

Delivery Installations Data Import File Layout

The import file must be an ASCII flat file where character and non-integer numeric fields are enclosed in double quotes (") and delimited by the selected file delimiter character. Where no information is available the system expects a blank entry (i.e. ""). Each record is separated by a carriage return. Records starting with a number sign (#) are considered comment lines and are skipped.
Three distinct file formats are valid for the Delivery Installations Import function.

Formats 1 and 2 are very specific, by Delivery Mode, and are aimed at customers having precise delivery requirements and good knowledge of the Canada Post network.

Format 3 is aimed at an audience with generic delivery requirements.

The purpose of the following tables is to outline the information Electronic Shipping Tool is expecting during the Delivery Installations Data import process.

Import File Formats 1 and 2

Records of format #1 must have either 6 or 8 fields (to support the first version of file, where the last 2 fields did not exist) and those of format #2 must have 8 or 10 fields. When there are 8 fields, if the first field has a length of 9, the record is considered of format #1.

Field – Format #1	Type	Length	Mandatory / Optional	Validation
FSADMDMID[1]	String	9	M	Validate Mandatory. If validation fails, record error message 2665 in the error file. Validate for format (ANAAANNNN). If validation fails record error message 2666 in the error file. Validate that a Delivery Installation exists in the Householder data for the FSADMDMID provided. If validation fails record error message 1278 (for invalid FSA), 1279 (for invalid DM Type), and/or 1280 (for invalid DM Id) in the error file.
Secondary Delivery Installation (Abbreviated) Name	String	15	O	Validate that it exists in the Householder data for the Delivery Installation retrieved based on FSADMDMID provided. If validation fails, record error message 1283 in the error file. Validate for mandatory if data for Houses, Apartments, Farms, or Businesses has been supplied. If the validation fails, record message 1443.
Houses	String	7	O	Validate for numeric and length of 7. If validation fails, record error message 1196 in the error file. If this field is not blank and the Mail Pieces Over 14"x6" (35.56x15.24 cm) checkbox is selected(on the SOM data entry window) then validate that the Delivery Mode Type is not 'LC'. If the validation fails, record message 1475. Validate less than or equal to the Total Points of Call Householder amount based on the supplied start date. If the validation fails, record message 1440.
Apartments	String	7	O	Validate for numeric and length of 7. If validation fails, record error message 1196 in the error file. If this field is not blank and the Mail Pieces Over 14"x6" (35.56x15.24 cm) checkbox is selected (on the SOM data entry window) then validate that the Delivery Mode Type is not 'LC'. If the validation fails, record message 1475. Validate less than or equal to the Total Points of Call Householder amount based on the supplied start date. If the validation fails, record message 1440.
Farms	String	7	O	Validate for numeric and length of 7. If validation fails, record error message 1196 in the error file. If this field is not blank and the Mail Pieces Over 14"x6" (35.56x15.24 cm) checkbox is selected (on the SOM data entry window) then validate that the Delivery Mode Type is not 'LC'. If the validation fails, record message 1475.. Validate less than or equal to the Total Points of Call Householder amount based on the supplied start date. If the validation fails, record message 1440.
Businesses	String	7	O	Validate for numeric and length of 7. If validation fails, record error message 1196 in the error file. Validate less than or equal to the Total Points of Call Householder amount based on the supplied start date. If the validation fails, record message 1440.

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[1] The FSA within the FSADMDMID data field above maps uniquely to a primary Delivery Installation Name and is used to populate the Delivery Installation Name field on both the Select Delivery Installation(s) for Mailing Plan window and the Delivery Installation Detail window.

Field – Format #1	Type	Length	Mandatory / Optional	Validation
ADS Reference #1	String	20	O	Free form but must be the same for all records of a given FSADMDMID. If a discrepancy is found, display message 1649: If user replies OK, assign the ADS Reference #1 from the first record of the DI to all subsequent records. If user replies Cancel, stop processing the file (see task step End Process later).
ADS Reference #2	String	20	O	Free form and same rule as ADS Reference #1 (i.e. must be same for all DI records).

Table 0-1 Import Delivery Installation Data File Layout #1

Field – Format #2	Type	Length	Mandatory / Optional	Validation
FSA/PC[2]	String	3, 6 or 7	M	Validate Mandatory. If validation fails, record error message 1284 in the error file. Validate for format (ANA or ANANAN OR ANA NAN). If validation fails record error message 2664 in the error file. Validate that a Delivery Installation exists in the Householder data for the FSA provided. If validation fails record error message 1278 in the error file.
"From" **DMDMID**	String	6	M	Validate Mandatory. If validation fails, record error message 2667 in the error file. Validate format for (AANNNN). If validation fails, record error message 2668 in the error file. Validate that it exists in Householder data for the Delivery Installation retrieved based on the FSA/PC provided. If validation fails record error message 1279 (for invalid DM Type) and/or 1280 (for invalid DM Id) in the error file.
"To" **DMDMID**	String	6	O	Validate format for (AANNNN). If validation fails, record error message 2669 in the error file. Validate that it is greater than or equal to the "from DMDMID". If validation fails record error message 1281 in the error file. Validate that the 'To' DM Type is the same as the 'From' DM Type. If the validation fails display error message 2670 in the error file. Validate that it exists in the Householder data for the Delivery Installation retrieved based on the FSA/PC provided. If validation fails record error message 1279 (for invalid DM Type) and/or 1282 (for invalid DM Id) in the error file. Validate that the 'From" Id equals the "To" Id if data for Houses, Apartments, Farms, or Businesses has been supplied. If the validation fails, record message 1443.
Secondary Delivery Installation (Abbreviated) Name	String	15	O	Validate that it exists in the Householder data for the Delivery Installation retrieved based on the FSA/PC, DM Type and DM ID range provided. If validation fails record error message 1283 in the error file. Validate for mandatory if data for Houses, Apartments, Farms, or Businesses has been supplied. If the validation fails, record message 1443.

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[2] The FSA within the FSA/PC data field above maps uniquely to a primary Delivery Installation Name and is used to populate the Delivery Installation Name field on both the Select Delivery Installation(s) for Mailing Plan window and the Delivery Installation Detail window.

Field – Format #2	Type	Length	Mandatory / Optional	Validation
Houses	String	7	O	Validate for numeric and length of 7. If validation fails, record error message 1196 in the error file. If this field is not blank and the Mail Pieces Over 14"x6" (35.56x15.24 cm) checkbox is selected (on the SOM data entry window) then validate that the Delivery Mode Type is not 'LC'. If the validation fails, record message 1475. Validate less than or equal to the Total Points of Call Householder amount based on the supplied start date. If the validation fails, record message 1440.
Apartments	String	7	O	Validate for numeric and length of 7. If validation fails, record error message 1196 in the error file. If this field is not blank and the Mail Pieces Over 14"x6" (35.56x15.24 cm) checkbox is selected (on the SOM data entry window) then validate that the Delivery Mode Type is not 'LC'. If the validation fails, record message 1475. Validate less than or equal to the Total Points of Call Householder amount based on the supplied start date. If the validation fails, record message 1440.
Farms	String	7	O	Validate for numeric and length of 7. If validation fails, record error message 1196 in the error file. If this field is not blank and the Mail Pieces Over 14"x6" (35.56x15.24 cm) checkbox is selected (on the SOM data entry window) then validate that the Delivery Mode Type is not 'LC'. If the validation fails, record message 1475. Validate less than or equal to the Total Points of Call Householder amount based on the supplied start date. If the validation fails, record message 1440.
Businesses	String	7	O	Validate for numeric and length of 7. If validation fails, record error message 1196 in the error file. Validate less than or equal to the Total Points of Call Householder amount based on the supplied start date. If the validation fails, record message 1440.
ADS Reference #1	String	20	O	Free form but must be the same for all records of a given FSA/PC. If a discrepancy is found, display message 1649: If user replies OK, assign the ADS Reference #1 from the first record of the DI to all subsequent records. If user replies Cancel, stop processing the file (see task step End Process later).
ADS Reference #2	String	20	O	Free form and same rule as ADS Reference #1 (i.e. must be same for all DI records).

Table 0-2 Import Delivery Installation Data File Layout #2

The Delivery Installation Postal Code maps uniquely to a primary Delivery Installation Name and is used to populate the Delivery Installation Name field on both the Select Delivery Installation(s) for Mailing Plan window and the Delivery Installation Detail window.

The Delivery Mode data (i.e., FSA, DM type, DM Id, DI Name) will be grouped by Delivery Installation Postal Code, Houses, Apartments, Farms, and Businesses. That is, all the data associated to the same Delivery Installation Postal Code will be saved onto a Delivery Installation Detail page.

If an import file containing Coverage values is imported, the following rules will apply:

The appropriate Coverage on the Delivery Installation Detail record will be selected. A Coverage value of 0 implies that this coverage is included. A Coverage value of null implies that this coverage is not included.

Each Coverage value for the Delivery Mode will be stored on the Delivery Installation Detail record.

Coverage values will be summed and populated in the Total Pieces Shipped for the Delivery field.

Import File Format 3

Field – Format #3	Type	Length	Mandatory / Optional	Validation
Record Type	Number	2	M	Value of '03' for this file format.
FSA/PC[3]	String	3, 6 or 7	M	Validate Mandatory. If validation fails, record error message 1284 in the error file. Validate for format (ANA, or ANANAN or ANA NAN if second digit is zero). If validation fails record error message 2664 in the error file. Validate that a Delivery Installation exists in the Householder data for the FSA provided. If validation fails record error message 1278 in the error file.
DM Type	String	4	M	Validate Mandatory. If validation fails, record error message 2667 in the error file. Validate format for valid DM Type (GB, LC, LB, RR, SS, DR, MR, CF, or 'ALL' or 'TOUS'). If validation fails, record error message 2702 in the error file.
ADS Reference #1	String	20	O	Free form but must be the same for all records of a given FSA/PC. If a discrepancy is found, display message 1649: If user replies OK, assign the ADS Reference #1 from the first record of the DI to all subsequent records. If user replies Cancel, stop processing the file (see task step End Process later).
ADS Reference #2	String	20	O	Free form and same rule as ADS Reference #1 (i.e. must be same for all DI records). ADS Reference #2 must be supplied, even if null (i.e. ""), when ADS Reference #1 is supplied.

Table 0-3 Import Delivery Installation Data File Layout #3

All the data associated to the same Delivery Installation Postal Code will be saved onto a Delivery Installation Detail page, and the following fields are initialized:

Set FSA/PC to the input FSA/PC;
Set DM Type to the input (which can 'ALL' or 'TOUS'); and
Set DM Id From, DM Id To and (Secondary) DI Name to 'ALL'.

Delivery Installation Data Import Error File Layout

The Imported Delivery Installation Data Error File layout will have exactly the same layout as the Delivery Installation Data Import File, with the records containing errors being copied, as is, from the import file to the error file. One or more comment lines [i.e. starting with a number sign (#)] will be inserted after each error record to describe the error(s), in English and French.
The Imported Delivery Installation Data Error File can be used as an import file after having been edited with any text-processing tool, such as Notepad.

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[3] The FSA within the FSA/PC data field above maps uniquely to a primary Delivery Installation Name and is used to populate the Delivery Installation Name field on both the Select Delivery Installation(s) for Mailing Plan window and the Delivery Installation Detail window.

5.0 Previewing your Statement Of Mailing

The Preview function allows you to preview your SOM information with the price rating of your order so that you can visually validate the results prior to finalizing and transmitting your completed SOM to Canada Post. For Unaddressed Admail, the Distribution Plan is displayed after the SOM Preview. Also, if you have selected the NPS Consolidation option on the Unaddressed Admail data entry window, then the NPS Consolidation report is the final one to be previewed.

You simply click the **Preview** command button on the data entry window or select Preview from the Tools menu when all required information has been properly entered on the window. If an error is found, a message dialog box is displayed with details on the error.

If changes are required to your SOM:

- Return to the data entry field(s) requiring correction.

- Make your changes or corrections.

- Then preview your SOM again.

If no errors are found (i.e. price rating is successful):

- Your SOM is displayed in a **Report Preview** window.

- Your SOM can be saved from the data entry window by clicking the **Save** button. If you saved your SOM prior to previewing it, then the SOM ID appears on the Preview; otherwise there is no SOM ID on the Preview.

- You can click the **Finalize** command button, as your SOM is now ready to be transmitted to the CPC server and printed.

- You can skip clicking the **Finalize** button and immediately click the **Transmit/Print** button. Only when you click this button will your SOM (and other documents) be printed.

When Downstream Entry is selected, your SOM Preview will group the line items and repeat them for each instance of the same Deposit Location, Deposit Date and Shipment No. When only Mailing Type of Partial is selected, the line items are grouped and repeated for each instance of the same Deposit Date and Shipment No. in your SOM Preview.

Note: For Unaddressed Admail, ALL Delivery Installations that do not have the Transportation Required option selected (i.e. the Deposit Location is set equal to the Delivery Installation in question and thus it is a direct drop-off of mail and there is no actual Deposit Location) are grouped as one line item on the SOM Preview, separate from Delivery Installations with actual Deposit Locations (i.e. Transportation Required selected).

6.0 Transmit/Print your Statement Of Mailing

6.1   Transmitting your SOM

The SOM data entry window also contains a **Transmit/Print** button, which electronically sends the SOM transaction to Canada Post when clicked.

After verifying that the information in the Preview is correct, click the **Transmit/Print** button located at the bottom of your SOM data entry window. Prior to transmission, a pop-up disclaimer message is displayed that is in line with the verification of the information provided to Canada Post.

By clicking OK to this command button, the application will:

- Initiate a connection with the CPC Server - you will be required to logon to the CPC server;
- Perform an application data and software update validation if required and;
- Create a Transmit Session log.

If the Transmit/Print function is successful, the Order record is saved with a status of Transmitted and automatically moved to the Transmitted SOMs folder.

As part of the transmission process, the following information is generated for Unaddressed Admail:

- An ADS Sequential Number is generated for each Delivery Installation Details record, starting at one for each SOM. The four-digit number is sequentially generated at the SOM level by the sort criterion selected on the Unaddressed Admail data entry window.

- If the ADS Reference sort criterion is selected, the sequential number is generated by ADS Reference and then by Delivery Installation Postal Code.

- If the Title of Mail Piece sort criterion is selected, the sequential number is generated by Title of Mail Piece and then by Delivery Installation Postal Code.

Note: Warning messages may be triggered during the Transmit/Print process (e.g. "blocked" due to credit issues). However, the order is still considered to be successfully transmitted.

The Transmit/Print process creates a Transmit Session Log record. When the user selects the Transmit Session Log record from the **List Pane** on the *Electronic Shipping Tools* **Desktop** window and invokes the Open action, the information related to the record selected is displayed in the **Report Preview** window. The **Report Preview** window is used to preview and print the selected Transmit Session Log record.

Attention: If the transmission fails, the Order is automatically moved from the Opened SOMs folder to the Finalized SOMs.

The Transmit Session log will be useful in determining the cause of any problems encountered. This will also assist the Help Desk in expediting error resolution.

6.2   Printing your SOM

To print your SOM, you must have correctly filled out the data entry window of a SOM and successfully transmitted the SOM. If the transmission process fails, the SOM, as well as all the other documents, are still printed with a "Untransmitted" watermark on each page.

Note: After the SOM is printed **(For Fully Featured option only)** you may click to continue printing the Distribution Plan, the ADS Forms and the Container Labels as well as the Packing Slips and the Summary of Mailing if they apply.

The SOM for the desktop version of the application has the following characteristics:

- The VCD local identifier is printed on the SOM report (this field is printed on the right-hand side below the Customer Signature field).

- Reprinting a SOM or an Unaddressed Admail Distribution Plan is possible (through the **Reprint** command button on the **Desktop** and **Search/Manage Orders** windows). In this case, a "Reprint" watermark is printed on each page of the SOM.

- The Multi-shipment SOM format is printed if the SOM has one or both of the following characteristics:

- Downstream Entry is selected or;

- Mailing Type of Partial is selected.

Note: A Multi-shipment report is produced when there is more than one line item. This could be because there are multiple Deposit Locations (i.e. Transportation Required selected), one Deposit Location with multiple Deposit Dates OR one or more Deposit Locations combined with Delivery Installations with Transportation Required not selected (grouped into one line item).

Special Case: If you manually create multiple line items but they are ALL for Delivery Installations but they are ALL for Delivery Installations with Transportation Required not selected, a Multi-shipment SOM report is not created.

The Multi-shipment SOM report provides shipment details displayed on the Packing Slip, including pricing information. The Multi-shipment SOM report is generated to group and display the line items for each Outlet Name, Date of Mailing

(this is the Deposit Date, not the Delivery Start Date as displayed on the Distribution Plan) and Shipment No. combination. **One SOM is produced for each line item.**

Attention: For Unaddressed Admail, since ALL Delivery Installations with Transportation Required selected are grouped into one line item, they are thus accounted for on one SOM of the Multi-Shipment SOM report. In this case, the Outlet Name is the Outlet of Payment (selected on the Unaddressed Admail data entry window) and the Date of Mailing is the earliest Deposit Date of all the Delivery Installations.

Two copies of the Multi-shipment SOM report are generated - the Customer retains one copy and another copy is submitted to the RVU (or Retail Site) at time of payment. For a Single-shipment SOM report, three copies are generated; the additional one is for data entry.

A barcode is printed on a Single-shipment SOM report. For a Multi-shipment SOM report, the barcode does not appear on the SOM but is printed on the Packing Slips.

The Multi-shipment SOMs printed are sorted by Outlet Name, Date of Mailing and Shipment Number (X). All pages of copy 1 are printed first, and then all pages of copy 2 are printed.

The shipment number (X) and the total number of shipments (Y) are derived based on the information entered on the SOM data entry window. "X" identifies a sequential number for the current SOM printed for line items that have the same Outlet Name, Date of Mailing and Shipment No. "Y" identifies the total number of instances grouped by Shipment No. that have the same Outlet Name and Date of Mailing (i.e. number of Packing Slips produced for the Order).

An indicator is displayed on the SOM to identify that the Downstream Entry checkbox is selected on the SOM data entry window.

7.0 Documentation and Forms

7.1 Statement of Mailing

A complete Statement of Mailing (SOM) can only be printed *after* electronic transmission of the order to Canada Post. A SOM preview is available for printing prior to transmission but the SOM number will not be provided. A barcode will be printed on the SOM for a Single Deposit location. For Multiple Deposit locations, the barcode will not appear on the SOM but will be printed on the Packing Slips.

There will be three copies of the Statement of Mailing printed. One called Data Entry, one for the Accepting Location and one for the Customer.

The Statement of Mailing, a sample of the mail piece and a copy of the Distribution Plan* and the payment must be submitted to the Payment Outlet Location before the mail can be accepted at Canada Post.* A distribution plan is required when more than 10 Delivery Installations are selected. When less that ten delivery Installations are selected a customer must include either a copy of the distribution plan, which is automatically printed by EST, or provide copies of the Unaddressed Admail Delivery Slips.

7.2 Produce Packing Slip for Multi-Shipments

A Packing Slip is generated only for Multi-shipments. The purpose of the Packing Slip is to provide a separate induction document for each induction site with the same Date of Mailing and Shipment No. This document reports on volume and excludes pricing information. The Packing Slip accompanies the individual mail shipments being inducted, enabling receiving offices to access the Order on the CPC server, verify the mailing and, subsequently, enter changes from the verification process (if necessary).

The Packing Slip is generated when the Order is successfully transmitted to CPC and has one or both of the following characteristics:

- Downstream Entry is selected or;

- Mailing Type of Partial is selected.

One copy of the Packing Slip is generated to display the line items on a given SOM for each Outlet Name, Date of Mailing and Shipment No. combination. The Packing Slip is printed with a barcode.

Attention: For Unaddressed Admail, in the event that ALL Deposit Locations are the same as the associated Delivery Installations (i.e. Transportation Required not selected), NO Packing Slip is generated.

The shipment number (X) and the total number of shipments (Y) are derived based on the information entered on the SOM data entry window. "X" identifies a sequential number for the current Packing Slip printed for line items that have the same Outlet Name, Date of Mailing and Shipment No. "Y" identifies the total number of instances grouped by Shipment No. that has the same Outlet Name and Date of Mailing.

The Packing Slips printed are sorted by Outlet Name, Date of Mailing and Shipment Number (X).

The Packing Slip report supports printing a maximum of thirteen line items per page.

An indicator is displayed on the Packing Slip to identify that the Downstream Entry checkbox is selected on the SOM data entry window.

7.3 Produce Summary of Mailing Report for Multi Shipments

The Summary of Mailing report is generated only for Multi-shipments. It is designed to assist you in your mail preparation process. It identifies all Outlet Names, Dates of Mailing and volumes for each Packing Slip produced. This document **must be presented** to the office where payment is made, and is used as a control document and for quick reference.

The Summary of Mailing report is generated when the Order is successfully transmitted to CPC and has one or both of the following characteristics:

- Downstream Entry is selected or;
- Mailing Type of Partial is selected.

Each Packing Slip produced is summarized on the Summary of Mailing report to display the Total Volume by Outlet Name, Date of Mailing and Shipment No.

Two copies of the Summary of Mailing report are generated – the Customer retains one copy and another copy is submitted to the RVU (or Retail Site) at time of payment.

Attention: For Unaddressed Admail, in the event that ALL Deposit Locations are the same as the associated Delivery Installations (i.e. Transportation Required not selected), NO Summary of Mailing is generated.

The report is sorted by Outlet Name, Date of Mailing and Shipment No.

An indicator is displayed on the Summary of Mailing report to identify that the Downstream Entry checkbox is selected on the SOM data entry window. This report may span more than one page.

7.4 Distribution Plan

The Distribution Plan is only required when the mailing has a combination of Transportation required for some Delivery Installations and not required for others. A complete Distribution Plan* can be printed after electronic transmission of the order to Canada Post. After printing the Statement of Mailing click the button "Continue to generate Distribution Plan". This document must be provided at the Payment Outlet before the mail can be accepted. There will be two copies of the Distribution Plan printed, one for the Accepting Location and one for the Customer.

The Distribution Plan is sorted by Outlet Name, Date of Mailing and Shipment Number. All pages of copy one are printed, and then all pages of copy two.

* The user will have the ability to print the Distribution Plan by using existing 'Reprint' functionality. This is available on the main VCD Desktop window and the Search / Manage Orders window. The user simply needs to highlight the SOM line item and click on the 'Reprint' button.

A distribution plan is required when more than 10 Delivery Installations are selected. When less that ten delivery Installations are selected a customer must include either a copy of the distribution plan, which is automatically printed by EST, or provide copies of the Unaddressed Admail Delivery Slips.

The Preview window is opened and displays a copy of the SOM. The user clicks on the 'Next Report' button to view the Distribution Plan. To physically print the document, the user clicks on the 'Print' button.

7.5 Generate Unaddressed Admail Delivery Slips

Unaddressed Admail Delivery Slips (ADS) can be printed on either laser or thermal printers. The laser printers use 8 ½ x 11-inch paper stock that is perforated horizontally in the middle in portrait layout. The thermal label format will print 4" by 6" labels providing additional space to display more customer and mailing specific details.

If both the ADS and the associated Container Labels are printed on thermal paper, they will be collated together (i.e., ADS 1, its Container labels, ADS 2, its Container labels, etc.). Otherwise, ADS are collated according to the collation selected on the Unaddressed Admail SOM data entry window.

One ADS form fits on half of an 8-1/2 x 11 plain paper in portrait layout; two ADS forms are printed on one page and each sheet contains a page number positioned at the top right hand corner.

On thermal paper, each ADS fits on one page. Two identical versions of the thermal ADS exist: one for printers using Windows drivers and one for those using EST Native drivers.

The slips are printed after the successful transmission of the SOM(s). After the Distribution Plan has been printed, you will be asked to confirm that you wish to print the ADS. Ensure that you have the correct paper stock in your printer.

Clicking the Reprint button on the Desktop or Search/Manage Orders window reprints the ADS. In this case, each ADS has a "Reprint" watermark on it.

When less than full coverage is identified on the Delivery Installation Details page at the Delivery Mode (DM) level, each Unaddressed Admail Delivery Slip is printed with "Less than full coverage" watermark and the quantities for the Delivery Modes are printed between brackets.

When less than full coverage is identified on the Delivery Installation Details page at the Delivery Installation level, the last Unaddressed Admail Delivery Slip based on the sequence you provided is printed with "Less than full coverage" watermark.

7.6 Container Labels

Container labels for your Unaddressed Admail mailing can be printed on either a laser printer or thermal printer. For laser printers, you need to print the labels on 8 ½ x 11-inch custom pre-printed paper stock that contains six peel-off labels. Canada Post will provide these custom labels to customers (Form #33-086-612). For thermal printers, the complete label is printed on 2 ¼ x 4-inch white thermal label stock.

For laser printers, six labels are printed on one 8 ½ x 11 inch pre-printed paper stock in landscape layout. The labels are 2 ¾ x 4 inches in size. The static data on the label (i.e. field labels and border lines) is printed on all six labels regardless of whether there is data to be printed. For thermal labels, the labels are 2 ¼ x 4 inches. Note that the space available for printing the text should be reduced 1/8 inch on each side (however this does not apply to the lines).

On thermal paper, one label is printed per page, in two sections so it can be folded in the middle. The top section is almost identical to the plain paper label, Version Specific being replaced with Transportation Required, while the bottom section adds containerization information for the customer.

The purpose of the labels is to capture the Delivery Installation Details and Statement of Mailing data entered in the application.

Labels are affixed to all mail containers to identify the sender, Delivery Installation name and address and number of containers going to a Delivery Installation. The number of labels printed per Delivery Installation Details record is dependent on the value calculated in the Number of Containers field.

You can select not to print Unaddressed Admail labels by deselecting this option on the **Site Information** window under the **Options** tab.

Addresses displayed should adhere to the Canadian Addressing Guide. However, if the complete address line cannot fit in the space allocated to it on the label, it will be truncated. Note that the key piece of information that must be displayed prominently as shown on the report layout is the Delivery Installation Postal Code.

Note that the Transmit/Print process triggers the label generation. The labels are the last documents to be printed after the successful transmission of the SOM(s). Clicking the **Reprint** button on the **Desktop** or **Search/Manage Orders** window reprints the labels.

To obtain the adhesive labels to print tie-on tags and labels, please contact your Canada Post Representative, Commercial outlet or call our Business Hotline at 1-800-260-7678.
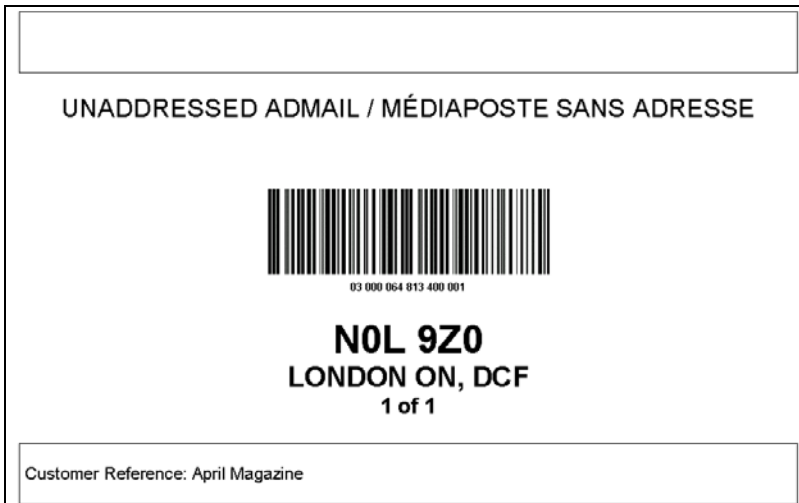
Note: A keeper label is also required when using bags. The keeper label is inserted into the metal tag holder attached to the bag and contains information on the destination office. Customers are responsible to create and supply keeper labels.

7.7   Print NPS Consolidation Documents

If the user selects the NPS Consolidation option on the Unaddressed Admail data entry window, then the application automatically prints the following two documents after the SOM(s) have been successfully transmitted to CPC: NPS Consolidation Report and Monotainer/Skid labels. The report is designed to assist in facilitating the physical mail preparation process. The labels print with a barcode. They can be sorted by NPS Sequence (the user must select this radio button on the Unaddressed Admail data entry window). **The label must be clearly visible on each Monotainer or Skid.**

UNADDRESSED ADMAIL / MÉDIAPOSTE SANS ADRESSE

03 000 064 813 400 001

N0L 9Z0
LONDON ON, DCF
1 of 1

Customer Reference: April Magazine

7.8   Packing Slip

A Packing Slip is printed when you select a Multi-Deposit scenario. A complete Packing slip can be printed with the barcode after electronic transmission of the order to Canada post. A packing slip must be provided for each deposit location. In the event that the deposit location is the same as the delivery Installation no Packing Slip will be generated.

When the Packing Slips are displayed on screen, **print document** by clicking on the printer icon below this message.
Before continuing, ensure a copy of the document is printed.

Continue to Generate Distribution Plan
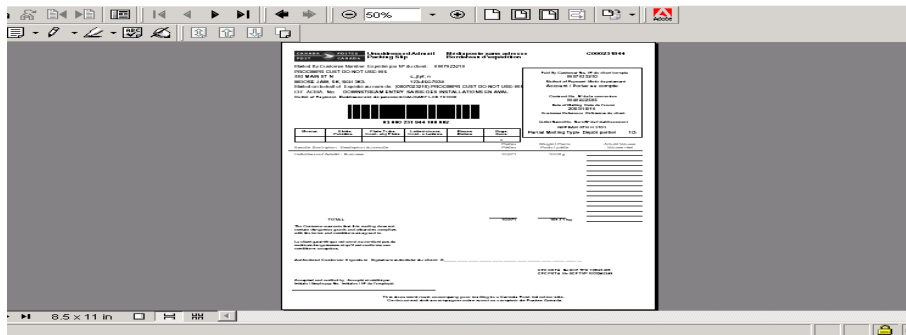
Note: The printing order of documents for a Multi- Deposit location order will differ from those orders with a single deposit location.

7.9   Summary of Mailing

This new form is designed to assist the customer in their mail preparation process. The Summary of Mailing will be printed when a customer selects Multiple Deposit locations. A complete Summary of Mailing can be printed after electronic transmission of the order to Canada Post. In the event that the Deposit location is the same as the Delivery Installation no summary of Mailing will be generated. The Summary of Mailing displays the Deposit location as the Outlet of Payment when "Transport Required" is selected. Otherwise the Deposit Location is the Delivery Installation. The Summary of Mailing **does not** have to be submitted to Canada Post.

When the Document Plan is displayed on screen, **print document** by clicking on the printer icon below this message. Before continuing, ensure a copy of the document is printed.

Continue to Generate Statement of Mailing
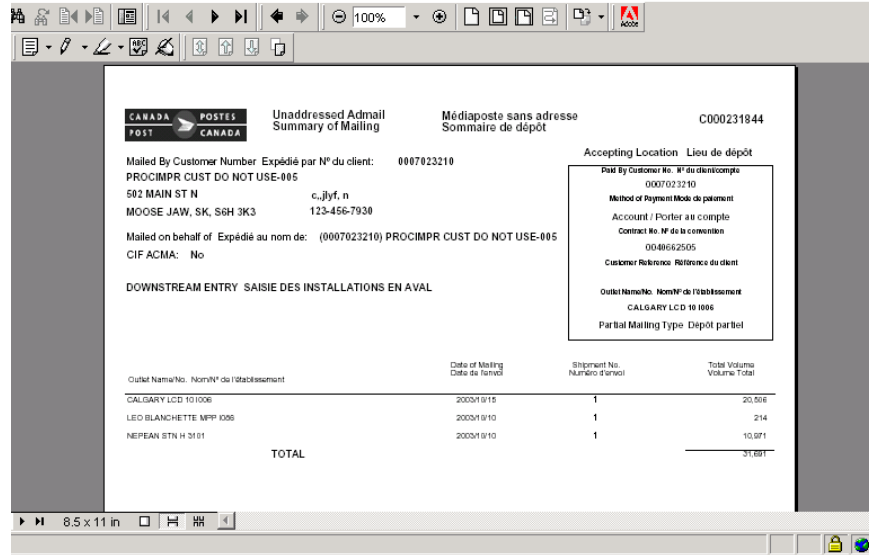
Note: For Multi Deposit location orders the Summary of Mailing will be printed first.

8.0 Technical Assistance

Technical assistance is available as follows:

If you have set-up or technical questions contact the Electronic Shipping Tools Help Desk weekdays from 7AM to 9PM (Eastern Standard Time) at 1-800-277-4799.

Appendix

Page Set for Unaddressed Admail Documentation and Forms

Documents and Forms Name	Page Set-up Requirements
Statement of Mailing (SOM)	Page set-up 8"x11", orientation "Portrait"
Distribution Plan	Page set-up 8"x11", orientation "Landscape"
Unaddressed Admail Delivery Slip	Page set-up 8"x11", orientation "Landscape"
Container Label	Page set-up form #34 099-600EST (03/04), orientation "Portrait"
Packing Slip	Page set-up 8"x11", orientation "Portrait"
Summary of Mailing	Page set-up 8"x 11", orientation "Portrait"