Electronic Shipping Tools Application

Communications Services
User Guide

On-line version

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1.0 Introduction to the Electronic Shipping Tools – Communications Services

This guide is designed to help you learn the basic functions of *Electronic Shipping Tools* in order to prepare your Communications mailings.

Communications Services Offerings– This section lists the different Service Offerings for Communications Services. It provides a brief description of each one and identifies where to find additional information.

 Application This guide takes you step-by-step through the process of completing your electronic Statement of Mailing - from the entry of data into the application, along with the validations that take place, and the functionality of the command buttons and templates to transmitting and printing your SOM.

2.0 Communications Services

2.1   Service Offerings

The following Communications Services mailings can be made using *Electronic Shipping Tools*:

- Lettermail ™
- Addressed Admail ™
- Publications Mail
- Unaddressed Admail ™
- International Incentive Letter-post ™
- Catalogue Mail

A brief description of each of the Service Offerings follows. For detailed information about a specific Service Offering, just click on it in the list above if you are reading this guide online. If not, please visit the Canada Post website (www.canadapost.ca) > Business Needs > Marketing & Selling and then select the service from the drop down list or contact your Canada Post Representative.

2.1.1   Lettermail ™

Lettermail is a convenient, cost-effective, secure and high-impact way to send personal messages, business correspondence, invoices, billing statements and much more. Lettermail is predictable in service, easy on the budget and easy to use.

2.1.2   Addressed Admail ™

Addressed Admail consists of mailable items, bearing a uniform message, that:

- Promote the sale or use of products or services;
- Report on financial performance, primarily for promotional purposes or;
- Solicit donations or contributions.

2.1.3   Publications Mail

Publications Mail includes newspapers, magazines and newsletters, which are:

- Mailed in Canada and addressed to a subscriber, non-subscriber or news dealer anywhere in Canada and;
- Produced for the purpose of disseminating news and information to the public.

2.1.4   Unaddressed Admail ™

Unaddressed Admail consists of printed matter and product samples that are not addressed to specific delivery addresses in Canada. Unaddressed Admail can be used to deliver advertising messages to some 13 million homes and businesses served by Canada Post. Advertisers can direct their messages to an area as large as the entire country or as small as a single letter carrier walk.

Two options are available for Unaddressed Admail: Unaddressed Admail - SOM only (without Delivery Installation Details), and Unaddressed Admail – Fully Featured (with Delivery Installation Details). There will be an incentive starting January 2005 for customers who use the Fully Featured option. Messaging will be provided on the invoice effective January 2005 indicating the Fully Featured service had been used.

2.1.5   International Incentive Letter-post ™

International Incentive Letter-post offers qualifying Canadian-based, large-volume commercial mailers an incentive-based service for mail destined to all areas in the USA and internationally.

2.1.6   Catalogue Mail

Catalogue Mail is printed matter of bound or sewn pages, which are specifically designed to sell and/or promote products or services, and includes, but is not limited to, a telephone directory, a university calendar and a list of products.

3.0 The *Electronic Shipping Tools* Home Page

3.1   The Home Page

Upon selecting *Electronic Shipping Tools* from the Online Business Centre (OBC), the service offerings available for Communications Services are listed in the box titled Online Version. In the top right-hand corner, you can access online OBC help and toggle between English and French screens.

3.2   Navigating Around *Electronic Shipping Tools*

To select from the menu on the Navigation bar or to activate a command button:
- Use the mouse to point and click on the desired option.

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

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

All drop-down lists have the same functionality, that is, if the user types in a character then the drop-down list automatically scrolls to the first item in the drop-down list that begins with this character. However, if the user types a second character, then the list automatically scrolls down to the first item in the drop-down list that *begins* with the second character entered.

Electronic Shipping Tools Help will indicate the version number and last updated date of the Internet application.

4.0 Using the *Electronic Shipping Tools* Application

4.1 Communications Services Data Entry Page

The Communications Services page for Lettermail is presented below. The data entry pages for the other Service offerings are similar to this one. However, there are a few differences with respect to the information you are required to enter. The Communications Services Navigation Bar along the left-hand side of the screen serves as your menu from which you can select the service offering for data entry.

4.2   Creating an Electronic Statement of Mailing (SOM)

Creating an electronic Statement of Mailing is simple – there are seven steps involved in creating a Statement of Mailing. This software tool 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.

SOM Task	TASK COMPONENTS & CHARACTERISTICS
1. Select a Service Offering for which a SOM will be created	Click on the applicable Service Offering from the Communications Services Navigation Bar. This action will open the appropriate data entry screen. From here you may begin to capture the information required for the mailing you want to do. For details on the Service Offerings available, see Section 4.1 Service Offerings. Mandatory data elements are highlighted with an asterisk (*).
2. Enter your Mailing Information	The Mailing Information section of the data entry screen contains customer information required to ensure accurate pricing and billing (where applicable) of the transaction. For a complete description of all fields, see Section 5.9.1 The Mailing Information Section in the Data Fields and Descriptions section.
3. Enter information regarding the Items to be mailed	Enter the details of your mailing as it pertains to the service description(s) selected here. You will be required to enter information concerning the type of mailing, number of pieces, weight and specific information as it pertains to your service description. For a complete description of all fields, see Section 5.9.2 The Items Section in the Data Fields and Descriptions section.
4. Preview and verify your SOM	Select the Preview command button to validate the data entered and to calculate the price of your mailing. You should verify that the information presented is correct. For details, see Section 5.4 Previewing Your SOM.
5. Save your SOM as a Template	Templates offer you the ability to save data entered for reuse when creating another SOM. Enter a Template Name in this field and click on the Save as Template checkbox. If you do not save your SOM as a Template, the data from your last successfully previewed SOM will be presented upon your next login to the application. For details on Templates, see Section 5.7 How to Use Templates.
6. Transmit this information to Canada Post Corporation	Upon successful Preview, click on the Transmit command button to electronically transfer your SOM to a CPC server. For details, see Section 5.5 Transmitting Your SOM. If the transaction has been successfully received by CPC, you will be taken to the Print SOM page. If the transmission fails, an appropriate error message will be displayed. Please note the error message and message number, as this will assist the Help Desk in resolving the problem.
7. Print your documents	Print copies (3) of your SOM by selecting the Printer icon on the tool bar. For details, see Section 5.6 Printing Your Documents. If you selected Unaddressed Admail, a SOM and Distribution Plan will be printed. A link is available to generate your ADS forms and container labels as well as Summary of Mailing and Packing Slips, if required.

4.3 Creating Admail Delivery Slips for Unaddressed Admail

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

You may choose to create an Unaddressed Admail SOM without Delivery Installation Details – **SOM Only,**
or, you could create an Unaddressed Admail SOM with Delivery Installation Details – **Fully Featured.**

CANADA POSTES POST CANADA	Order Products and Supplies	Electronic Shipping Tools	Manage My Accounts	My On-line Tools	Log Out
On-line **Business** OBC Centre					Français
	Home > Electronic Shipping Tools > Communication Services				Help

Unaddressed Admail - SOM Only
Help desk: 1-800-277-4799

Communication Services	Select Template			All fields suffixed by the * are mandatory fields.
Lettermail	[▼] Retrieve			
Addressed Admail	**Mailing Information**			
Publications Mail	Mailed By*	Mailed On Behalf Of*	Contract Number	Paid By Customer*
Unaddressed Admail - SOM Only	3440621 ▼	3440621	40020903	3440621
Unaddressed Admail - Fully Featured	Contact Name* multon		Telephone Number* 613-755-9988	
Int'l Incentive Letter-post	Date of Mailing (yyyymmdd) 20040813		Outlet* CALGARY MPP (I066)	Select Outlet
Catalogue Mail	Method of Payment*		Customer Reference	Continuous Inbound Freight
Delete Template	Account ▼			☐ (CIF)

Mailing Type: ◉ Full ○ Partial   Monos   Skids   Flats Tubs   Lettertainers   Bags   Boxes

Items

Service Description	No. of Pieces	Weight per Piece	Transportation Required	Date of Deposit
Unaddressed Admail ▼	10000	5.00 g	☐	
▼			☐	
▼			☐	

Preview   Clear

CANADA POSTES POST CANADA	Order Products and Supplies	Electronic Shipping Tools	Manage My Accounts	My On-line Tools	Log Out
On-line **Business** OBC Centre					Français
	Home > Electronic Shipping Tools > Communication Services				Help

Unaddressed Admail - Fully Featured
Help desk: 1-800-277-4799

Communication Services	Select Template			All fields suffixed by the * are mandatory fields.
Lettermail	[▼] Retrieve			
Addressed Admail	**Mailing Information**			
Publications Mail	Mailed By*	Mailed On Behalf Of*	Contract Number	Paid By Customer*
Unaddressed Admail - SOM Only	3440621 ▼	3440621	40020903	3440621
Unaddressed Admail - Fully Featured	Contact Name* Juan Figueroa		Telephone Number* 905 555 5555	
Int'l Incentive Letter-post	Outlet of Payment* OAKVILLE STN MAIN (6934)			Select Outlet
Catalogue Mail	Method of Payment*		Customer Reference	Continuous Inbound Freight
Delete Template	Account ▼			☐ (CIF)

Mailing Type   Monos   Skids   Flats Tubs   Lettertainers   Bags   Boxes
Full

Items

☐ Mail Pieces Over 14" x 6" (35.56 x 15.24 cm)

Service Description	No. of Pieces	Weight per Piece	Transport Pieces	DI Details Entered	Date of Deposit
Unaddressed Admail ▼		10 g		☐ Enter DI Details	
▼				☐ Enter DI Details	
▼				☐ Enter DI Details	

Preview   Clear

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

1. Select Unaddressed Admail **SOM Only or Fully Featured** from the left hand side menu underneath Communications Services. Enter your Mailing Information

   Two options are available for Unaddressed Admail: **Unaddressed Admail - SOM only (without Delivery Installation Details), and Unaddressed Admail – Fully Featured (with Delivery Installation Details)**. There will be an incentive starting January 2005 for customers who use the Fully Featured option. Messaging will be provided on the invoice effective January 2005 indicating the Fully Featured service had been used.

   a. **SOM only option:** You will be provided 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 choose this option

   b. **Fully Featured EST with incentive:** You will be provided a SOM with all associated forms / labels / reports. As of January 2005, you will receive a 2% discount 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 choose Fully Featured, all mailing plan data and barcoded documents must accompany the mailing, including:

      i. Statement of Mailing (SOM)
      ii. Distribution Plan
      iii. Packing Slips
      iv. Unaddressed Admail Delivery Slips
      v. Container Labels

2. Select an Outlet of Payment by clicking the **Select Outlet** button. Select either "Major Postal Facilities only" or "All postal facilities". Select a province from the drop down list and then enter a city name. You can also search by Outlet number. Once you have selected your search criteria, click **Search.** The Outlet list will be populated with Outlets matching your search criteria. Select which outlet you want from the populated list by clicking on the Outlet Name. This outlet will now appear on your Statement of Mailing (SOM).

Note: Once the Outlet of Payment has been selected you will be returned to the Unaddressed Admail data entry page.

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. 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 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. As for FSA/Postal Code, you can also search based only on the FSA. 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 do a search with just entering either the Delivery Area name or FSA/PC.

    Search criterion is not case-sensitive, as data entered in converted to uppercase. For the FSA/PC, even if you type lower-case letters, they immediately appear as uppercase letters.

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

3. You can highlight one or more Delivery Installation Name(s) in the Search Results list view and click the **Add >** button in order to add the selected Delivery Installation(s) to the Mailing Plan.

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 Installations and click the **< Remove** button.

    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 view is sorted in the order that the Delivery Installations are selected.

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.

4.3.2 Delivery Installations Details – Split Walks

A letter carrier route may consist of more than one FSA. This is referred as a "split walk". You can choose 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.
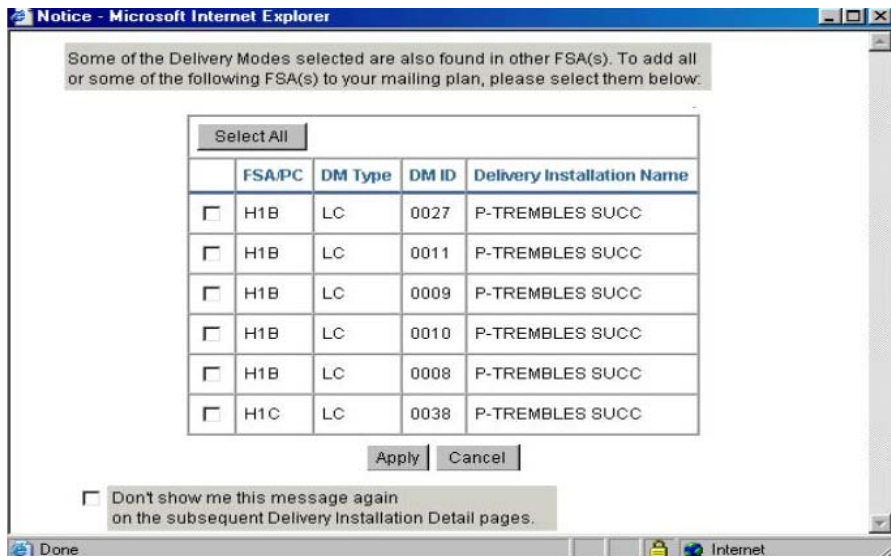
Select All

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 show…

When you check this box, this message will not appear on the subsequent Delivery Installation Detail pages.

4.3.3   Enter Delivery Installation Details

The Delivery Installation Detail 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 page can be divided into the following sections:
- SOM Information
- Delivery Information
- Delivery Timing
- Mail Preparation
- Target Area
- Select Delivery Modes (DM)
- Get Householder Counts / Add Delivery Mode Lines
- Control Bar at the bottom of the screen which allows you to View Mailing Plan / Delete / Clear / Finish 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 the data entry page.

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 inducting 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 choose the Transport Required option.**

This field defaults to the Payment Outlet selected on the Unaddressed Admail data entry page (since the Transport Required option initially defaults to being selected).

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 Transport Required checkbox does NOT automatically become deselected.

Transport Required – This checkbox is defaulted as selected. Choose this option if you set the Deposit Location different from the Delivery Installation. This means that you are inducting your mailing 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 choose the Transport Required option, then you must set the Deposit Location different from the Delivery Installation.**

Note: Make sure that you verify whether or not the Transport Required option is checked or not on the Delivery Installation Details page as it is automatically defaulted to checked.

ATTENTION: If you deselect the Transport 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 – This is a user-defined field whereby you can enter your won reference number, such as an internal tracking number (maximum of 20 characters).

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 induct your mailing either directly at the Delivery Installation in question or at the Deposit Location chosen).

Deposit Date – Enter the Deposit Date (YYYYMMDD) on which you will be depositing the 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 – Display Only. This field will become populated once the Deposit Date has been entered.

Specific Start Date – To use the Specific Start Date command you must click this radio button to identify that the delivery will be starting on a specific 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 – Display Only. The application will automatically calculate this field based on the Specific Start Date Entered. The Required Deposit Date identifies when you will need to have your mailing at the Delivery Installation to ensure that your product is delivered on time. Once populated you must verify that the Required Start Date has not already passed.

Deposit Before 11AM – This becomes automatically selected when the Delivery Installation and the Deposit Location are the same, Transport Required is **not** selected and the Specific Start Date command is being used. This feature reminds you that you must have your mailing at the Delivery Installation before 11AM.
Note: For **Letter carrier Delivery Installations** the delivery cycle reflects the number of business days required by the letter carriers to complete delivery of Unaddressed items. It applies to weekdays and excluded statutory holidays. Ensure your items are deposited or arrived at the Delivery Installation by 11:00 AM the day before the delivery cycle begins. For **Non Letter carrier Delivery Installations** you can deposit your mailing anytime during normal business hours for local delivery cycle to begin the following day.

Mail Preparation – This section contains options for you to choose how you would like your mail pieces to be prepared. You will be able to choose the type of containers from a drop down list at the Delivery Installation Detail Page.

Container Type – Select the type of container you would like the mail pieces to be enclosed in form the drop down list. If you wish to use two or more different types of containers for an order, you will be required to create a separate line item on the SOM data entry page.

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.

No. of Containers – This is a calculated field. You 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. You 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. You 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.

Target Area - This section allows you to select the type of coverage for your mailing. At least one Coverage 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.
http://www,canadapost.ca/business/tools/pg/manual/c12-e.asp

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 selected FSA/PC, DM Type and DM ID's filter the Delivery Installation Name drop-down list. 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.

4.3.4 Get Householder Counts

On-line queries against the Householder Count data can be performed by capturing the Target datadata, selecting the required route data (i.e. FSA/PC, DM Type, DM ID and Delivery Installation Name) and clicking on the **Get Count** button. The **Get Count** 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 choose 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 choose to change the "Total Pieces Shipped for Delivery", a pop-up message will warn you that the value differs from the Householder count.

Navigation Bar on the Delivery Installation Detail Page - from within the Delivery Installation Detail Page, you can View Your Mailing Plan, Delete the Delivery Installation, Clear/Finish data entry or move backward/forward to other Delivery Installation pages.

The Householder Count data displayed after clicking on the Get Count button is not saved between Delivery Installation pages. Subsequently if you have more than one page you will have to click on Get count button for every page to obtain the Householder count pertain to this page.

Page X of Y - indicates the total number of pages (Y) and your current placement among those pages (X) (i.e. Page 2 of 5).

If you click on the Finish button and there are still Delivery Installation Detail pages for which you have not entered any data, a warning message will be displayed to inform you of this fact. If you decide to proceed anyways, these Delivery Installations will be marked as incomplete in the Mailing Plan Summary. The Close Page function, that is the 'X' icon at the top right of the page, has the same functionality as the Finish button.

View Mailing Plan

If data has successfully been saved, the Mailing Plan Summary page is displayed.

Delete

Pressing this button initially warns you that you will be deleting information and upon your positive confirmation, it deletes the Delivery Installation (DI) Detail information and then displays the next or previous DI Detail page if one exists. If there is no previous DI Detail page, the SOM data entry page is displayed.

Clear

Pressing this button immediately asks you whether you wish to clear the page. If yes, the page is refreshed and all fields are cleared. Use this button when you want to start over with data entry.

Finish

Upon successful validations, this button saves the data and displays the SOM data entry page.

Note: For Unaddressed Admail these commands have greater implications. Please consult the Unaddressed Admail Online User Guide for more detail.

4.3.5   View the Mailing Plan Summary Page

The Mailing Plan Summary page allows the user to view a list of the Delivery Installations in the Mailing Plan, access the Select Delivery Installation(s) for Mailing Plan screen, navigate to a particular Delivery Installation and delete multiple ones.

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 – This field identifies the total number of pieces being shipped for delivery to the Delivery Installation in question.

Version Specific – Identifies whether the mailing has several versions (e.g. different store addresses appear on mail pieces that are otherwise the same).

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

Add to Mailing Plan

This button allows you to access the Select Delivery Installation(s) for Mailing Plan page from the Mailing Plan Summary page. In this situation, you may want to add more Delivery Installations to the Mailing Plan. The Select Delivery Installation(s) for Mailing Plan page will be populated with the previously selected Delivery Installations.

Go to DI

Highlight one Delivery Installation from the list and select **Go to DI** button. This will display the Delivery Installation Detail page for the selected Delivery Installation.

Delete Selected DI(s)

Click on this button for the selected Delivery Installation(s) to be deleted.

Close

This button closes the page and returns you to either the Unaddressed Admail screen or the Delivery Installation Detail page from which it was invoked.

Upon completing all of the Delivery Installation Detail information, you will be returned to the Unaddressed Admail SOM data entry page. You are now ready to preview your SOM.

4.4   Previewing Your SOM

The Preview option allows you to preview the SOM information for the price rating of your order and to visually validate the results prior to transmitting the completed SOM to Canada Post. For Unaddressed Admail, the Distribution Plan report is displayed after the Preview report in the same browser instance.

You simply click the **Preview** button on the data entry page when all required information has been properly entered on the form. This event triggers cross-field validations. If no errors are found, Adobe Acrobat will be launched in your browser window. If an error is found, a message dialog box is displayed with details on the error.

For Addressed Admail, if the Method of Payment is Metered and the Metered Rate information is not entered, then this information will be automatically calculated and displayed in the Addressed Admail Preview page (in the Metered Rate Column).

When the Method of Payment is Account, message 2301 appears at the bottom of the SOM Preview page to warn you to ensure that you have sufficient funds in your account.

If changes are required:

- Return to the data entry field(s) that needs to be corrected. Use the **Back** button to return to the data entry page.
- Make your changes or corrections
- Click on the Preview button again to preview your SOM.

Note: Your SOM preview will display all Delivery Installations based on deposit date as a separate group starting with the earliest deposit date. Your Deposit location equals your Outlet of Payment selected at the data entry page, whether or not that is where you are inducting the mail. This allows you to pay the entire mailing at one outlet location while depositing the mail at a different location.

Please review and ensure correct prior to transmitting to Canada Post

This preview is for review and correction purposes only. It does not replace the statement of mailing, which must accompany your mailing to a CPC induction site.

Preview Distribution Plan   Back

Note: Following the preview of your SOM you can continue to preview your Distribution Plan and review for any changes that you may wish to make there.

4.5   Transmitting Your SOM

The SOM Preview page also contains a **Transmit** button, which electronically sends the SOM transaction to Canada Post when clicked. After verifying that the information in the Preview is correct, use the **Transmit** button located at the top of your SOM page.

Note: Once you have transmitted a SOM, you cannot press the **Back** button to return to the Preview page and then click on **Transmit** button again. The message "Unable to transmit" will be displayed.

If Canada Post has successfully received the transaction, you will be taken to the Print SOM page.

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

- For Unaddressed Admail, an ADS Sequential Number is generated for each Delivery Installation Detail record, starting at one for each SOM. The 3-digit number is sequentially generated at the SOM level by the sort criterion selected on the Unaddressed Admail data entry page.

- 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.

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

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

4.6 Printing Your Documents

4.6.1   Printing Your SOM

The Print SOM page is displayed upon the completion of the "Transmit" function.

To print your documents, simply click on the printer icon on the tool bar. You can also scroll through the pages using the   key to move forward one page at a time and | will automatically take you to the last page.

After the SOM is printed **(Fully Featured 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. It is important to remember that if you continue forward without printing a form you may not click **Back** to print it later.

If for some reason you receive a warning message indicating that the order has been "blocked", you will see this information printed on the SOM next to the Method of Payment field. Please call the Help Desk or Business Hotline for additional information and assistance.

For Unaddressed Admail, the report frame positioned at the top of the browser window will also contain the message "Before printing, ensure a copy of the Statement of Mailing is printed".

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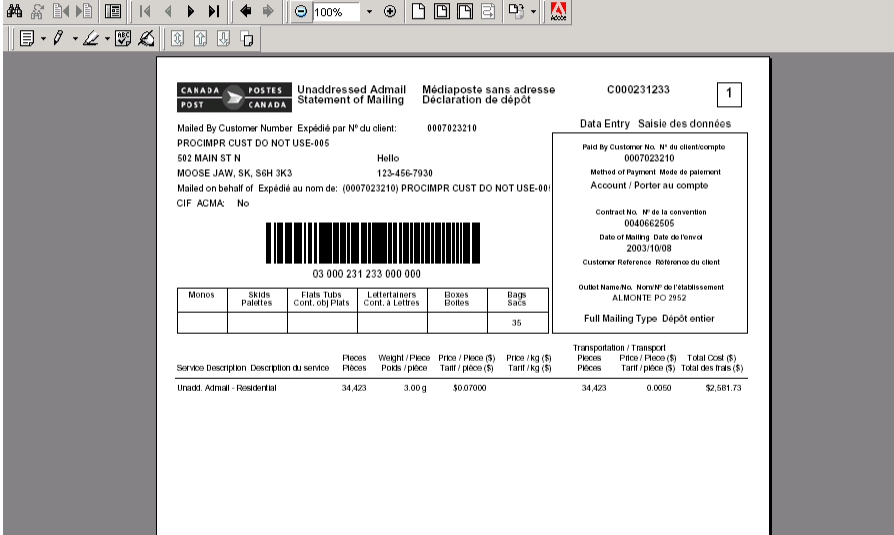
A complete Statement of Mailing (SOM) can only be printed *after* electronic transmission of the order to Canada Post. A SOM preview is available for printing prior to transmission but the SOM number will not be provided. A barcode will be printed on the SOM for a Single Deposit location. For Multiple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

4.6.3   Distribution Plan

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.

* 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.

4.6.4   Unaddressed Admail Delivery Slips (ADS)

After your Unaddressed Admail SOM and Distribution Plan have successfully been printed, click on the link to generate your ADS forms for the Delivery Installation Detail records. As with the Print SOM window, click on the Printer icon to print your ADS forms.

There are a number of requirements for printing your ADS forms:

- ADS forms must be printed on 8 ½ x 11-paper stock that is perforated horizontally in the middle in portrait layout. Two ADS forms are printed on one page.

- ADS forms must be printed on a laser printer.

The ADS forms produced by *Electronic Shipping Tools* are equivalent to a 'back stamped' ADS form (i.e. considered paid for) in the manual process.

One copy of the ADS form is generated for each Delivery Installation Detail record associated to each line item on the SOM. The ADS form(s) are sorted by the ADS Sequential Number generated as part of the SOM Preview.

The ADS form provides information about the Customer, the Statement of Mailing and the Delivery Instructions. The information displayed is derived from the Delivery Installation Detail page with the exception of the following:

- The Statement of Mailing Number is the Order ID generated when the Order is transmitted to Canada Post.

- The Control Number is composed of the Statement of Mailing number and the ADS Sequential Number.

- The Barcode displayed on the ADS form is generated from the Control Number.

When the ADS forms are displayed on screen, **print Forms** by clicking on the printer icon on the tool bar below. Before continuing, ensure the ADS forms are printed.

Continue to Generate Container Labels

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.

4.6.5   Container Labels

You can also automatically create Container labels with the delivery Installation Detail and Statement of Mailing data captured in the Electronic Shipping Tools application. These labels are affixed to all mail containers to identify the sender, Delivery Installation name and address and then number of containers going to a Delivery Installation. The number of labels printed per Delivery installation Detail record is dependent on the value calculated for the Number of Containers field based on values entered in the Pieces per Bundle and Bundles per Container fields and the derived Total Householder Count. The maximum number of labels that can be generated is limited to 300 labels.

To get to the labels page after you have printed your ADS forms, click on the Generate Labels link on the ADS form page. The Labels are sorted by the ADS Sequential Number and by Container Number.

Note: You must change the print orientation prior to clicking on the printer icon and ensure that you have labels in your printer tray. To change the orientation from the Min Menu of Adobe Acrobat, select File, Print. Click on the Properties button and select the Layout Tab. Select Landscape from the Orientation options, followed by OK.

By simply clicking on the printer icon on the toolbar, your labels will be printed in your laser printer.

To obtain the adhesive labels to print tie-on-tags and labels, please contact you Canada Post Representative, Commercial Outlet, call our Business Hotline at 1-800-260-7678 or order online at http://www.canadapost.ca/business/obc/products-e.asp.

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.

Note: Once the Container Labels have been generated you can continue to return to the Statement of Mailing Data Entry Page.

4.6.6   Packing Slips

This is a new document that will be printed when a customer selects 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.

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

4.6.7   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

4.7   How to Use Templates

Templates allow you to maximize the functionality of *Electronic Shipping Tools* by giving you the ability to save data entered for reuse when creating another SOM. As many as thirty (30) templates can be associated to your User ID for Communications Services.

4.7.1 Saving a Template

You can save a template by selecting the Save as Template checkbox and providing a Template Name in the appropriate field. Upon exiting the application, a validation will occur to ensure that the number of templates is currently less than thirty. If you enter or change a Template Name that matches the name of an existing template, a warning message will be displayed to confirm that you wish to overwrite this template. You can either change the template name or overwrite the existing template.

The following is a list of the fields saved in the template:
- Mailed On Behalf Of
- Contract Number
- Paid By Customer

- Contact Name
- Telephone Number
- Outlet
- Address Accuracy Percentage (for all Service Offerings except Unaddressed Admail and Int'l. Incentive Letter-post, Basic Lettermail, Basic International/USA Letter-post)
- Address Accuracy Expiry Date (for all Service Offerings except Unaddressed Admail and Int'l. Incentive Letter-post, Basic Lettermail, Basic International/USA Letter-post)
- Method of Payment
- Customer Reference No.
- Publication Title (Publications Mail only)
- PAP Registration No. (Publications Mail only)
- Mailing Type
- ServiceDescriptions

For Unaddressed Admail, ADS data (i.e. Delivery Installation Detail data) related to each line item will also be saved in the template. For each Delivery Installation Detail page containing data, the following fields will be saved in the Template:

- Title of Mail Piece
- Version Specific
- ADS Reference
- Delivery Installation
- Target Area

Route selection that is:FSA's
- DM Types
- DM ID From
- DM ID To
- Delivery Installation Name

Even if ADS data has been saved in the template, the ADS Form Indicator checkbox will not be selected for the retrieved SOM line items. The ADS template data can be viewed by clicking the **ADS** button. The Delivery Installations associated to each line item will be marked as Incomplete, but the ADS data is available for reuse.

4.7.2   Retrieving a Template

To retrieve a template, select the template name from the Select Template drop-down list on the SOM data entry page and click the **Retrieve** button (see Section 5.8 Command Button Functionality). The Select Template drop-down list contains all of the template names for all Service Offerings related to your User ID.

Once the template data has been retrieved, the data entry page will be refreshed and pre-filled with the template data. Note that the pre-filled fields can be modified. If the template retrieved is related to a different Service Offering than the one you have currently selected, the appropriate data entry page will be opened. If ADS data has been saved in the template, it can be viewed by clicking the **Enter DI Details** button even though the ADS Form Indicator checkbox is not selected for the retrieved line items.

4.7.3   Deleting a Template

You can delete a template by selecting the Delete Template link from the Navigation Bar on the data entry page. This link will open the Delete Template page.

On this page, select a template from the drop-down list and delete it by clicking on the **Delete** button. You will be asked to confirm whether you wish to delete the selected template.

4.7.4 Templates and ADS Data

If templates are being used, it is possible that some route selections may no longer be valid; that is, a selected FSA/PC, DM Type, DM ID or Delivery Installation (abbreviated) Name is no longer a valid selection. If this is the case, upon initiating the display of the Delivery Installation Detail page, a warning message will be displayed and the invalid data will not appear on the page.

It is also possible that a Delivery Installation may no longer exist. If this is the case, upon initiating the display of the Delivery Installation Detail page, a warning message will be displayed. This Delivery Installation Detail page will be deleted and the next Delivery Installation Detail page will be displayed.

4.8   Command Button Functionality

The Command buttons available on the Communications Services Data Entry screen provide the user with the ability to create a SOM with greater ease.

4.8.1   Retrieving a Saved Template

<div style="border:1px solid #000; display:inline-block; padding:4px 20px;">Retrieve</div>

If a saved template has been selected from the drop-down list, selecting this button will retrieve it. To retrieve a template, the user must have already created and saved a SOM as a template. For details on Template functionality, see **Section 5.7 How to Use Templates**.

4.8.2   Selecting an Outlet

<div style="border:1px solid #000; display:inline-block; padding:4px 20px;">Select</div>

Clicking this button will open another window from which you will be able to search and select an outlet for induction of your mail. The outlet identifies the name and number of the CPC location where the mail is brought for induction into CPC's mail stream.

When this window is initially displayed, the Outlet List is blank. You can search for an Outlet either by Province and City or by Outlet Number.

If you are searching by Province and City, the City drop-down list is blank. However, once you select a Province, the City drop-down list is filtered to display the values associated to the Province selected. By selecting a City from the drop-down list and clicking the **Search** button, the Outlet List will display the Outlets that match the search criteria, sorted by Outlet Name. You can then select an Outlet by clicking on the Outlet Name Link (e.g. OTTAWA MPP on sample screen on next page). This will display the required information for the selected outlet.

If you know the Outlet Number, enter the number in the Outlet No. box and click on the **Search** button. You can select an Outlet by clicking on the Outlet Name Link. This will return the user to the calling unit task, displaying the required information for the selected outlet.

Select Outlet/Induction Point – Microsoft Internet Explorer

Search Outlet/Induction Point

Please select the mail induction facility at which the mailing will be deposited or paid for by entering the following search criteria or by entering the Outlet No. directly.

○ Major postal facilities only   Province   City   Outlet No.
◉ All postal facilities   Ontario   OTTAWA   Or [   ]   Search

Outlet List

Outlet Name	Outlet Number	Address	City	Province	Postal Code
CANADA POST PLACE	2011	2701 RIVERSIDE DR	OTTAWA	ON	K1V 1J0
NEPEAN LCD N	I031	10 GREEN ST	OTTAWA	ON	K2J 1T0
NEPEAN STN H	3101	3659 RICHMOND RD	OTTAWA	ON	K2H 8Z0
OTTAWA STN T CSC	0015	1424 CALEDON PLACE	OTTAWA	ON	K1G 1C0
OTTAWA MPP	I077	1424 CALEDON	OTTAWA	ON	K1A 0C1
OTTAWA STN B	3102	59 SPARKS ST	OTTAWA	ON	K1P 5A0
OTTAWA STN C	I032	409 PARKDALE AVE	OTTAWA	ON	K1Y 1H0
OTTAWA STN D	7251	340 LAURIER ST W	OTTAWA	ON	K1P 5K0
OTTAWA STN E	3103	108 THIRD AVE	OTTAWA	ON	K1S 1L0
OTTAWA STN J	7252	3659 RICHMOND RD	OTTAWA	ON	K2A 0A0
VANIER POSTAL STATION LEAD HAN	3104	250 DUROCHER ST	OTTAWA	ON	K1L 5A0

Cancel

Done   Internet

4.8.3   Calculating a Weighted Average Weight

This icon allows you to calculate the weighted average weight of a number of items for a specific line item. If the mailing contains items of varying weights within the same weight band price point, use this icon to calculate the average weight for Lettermail, Publications, Addressed Admail and Catalogue Mail. You obtain the Weighted Average Weight Calculator by clicking the button with the calculator icon located to the right of the Weight per Piece field in the Service Description grid.

When you click the **Calculator Icon** button, the Weighted Average Weight Calculator worksheet is displayed in a pop-up window.

In order to calculate the average weight of your mailing, you must enter the Service Description for which the Weighted Average weight is being calculated, the weight of a single piece and the number of pieces that the weight is applicable to. The remaining fields from this screen are calculated based on the information you have entered.

- Sub-total Weight – the total weight of each line (Weight/Piece multiplied by No. of Pieces)
- Total (No. of Pieces) – the sum of the No. of Pieces column
- Total (Sub-total) – the sum of the Sub-total column. This is the total weight of all pieces entered.
- Weighted Average Weight per Piece – this is the average weight of a single piece. It is calculated as Total (Sub-total)/Total (No. of Pieces)

If all pieces are under (or at) the base weight, one weighted average weight calculation is made and entered in this field. If, however, you have pieces under (or at) the base weight and pieces over the base weight, two calculations are required: one weighted average weight calculation for the pieces under (or at) the base weight and one calculation for the pieces over the base weight. One row of the grid would be used for each calculation.

When you click the **Calculate** button, the application calculates the weighted average weight of the items you have entered and displays the result at the bottom of the page.

After completing your calculation, click the **Print** button to print a copy of this calculation and attach it to the Canada Post copy of your printed SOM.

When you click the **Accept** button, the total number of pieces and the weighted average weight are copied to the current grid row of the SOM data entry page.

When you click the **Reset** button, all data that you have entered is cleared from the page.

4.8.4   Previewing Your SOM

Preview

Once all the required data has been entered, you can generate a preview of the electronic statement of mailing by clicking on the **Preview** button. This will trigger a validation sequence against the Canada Post database. If no errors are found, Adobe Acrobat will be launched in your browser window. A preview of your electronic Statement of Mailing will be displayed containing the data you entered and the price calculation based on your data. You should verify that the information presented is correct before you transmit the Statement of Mailing.

If errors are found, a message is displayed indicating what caused the error. Upon correcting the information and no additional errors being found, preview your order once again.

4.8.5   Clearing your Data Entry Page

Clear

When you click on the **Clear** button, all the fields are cleared. Use this button when you want to start over with data entry.

4.9   Data Fields and Descriptions

4.9.1   The Mailing Information Section

In this section you will find general descriptions of all fields that are presented in the Communications Services Data Entry screen. Depending on the Service Offering selected, you can enter your Mailing Information for all of the fields displayed.

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

Mailed By (Customer Number) *
Select from the drop-down list the CPC assigned customer number of the customer that is preparing the mailing.

Mailed On Behalf Of (Customer Number) *
Enter the customer number of the owner of the mail, especially if different from the "Mailed By" customer number. This numeric field identifies the CPC assigned customer number of the customer who owns the mailing (i.e. customer on behalf of whom the mailing is being prepared).

If Publications Mail is selected, enter the Customer Number of the owner of the publication being mailed, especially if different from the "Mailed By" customer number.

Contract Number
Enter the contract number associated with the mailing.

Two validations are performed against the Contract Number upon selecting the **Preview** button:
- that the Service Descriptions selected are valid for that Contract Number and;
- that the "Mailed On Behalf Of" Customer Number is authorized to use that Contract Number.

Note: *For Addressed Admail, the following Service Descriptions require a contract number:*
- *Machineable Mail*
- *Letter Carrier Presort (LCP)*

Paid By Customer *
Enter the customer number of the customer who will be paying for the mailing. A validation is performed to ensure the "Paid By Customer" is a valid payer partner of the "Mailed On Behalf Of" Customer Number.

Contact Name *
Enter the name of the contact person familiar with this mailing.

Telephone Number *
Enter the telephone number and, if applicable, the extension number of the contact person.

Outlet (Number and Name) *
Click on 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 Mailing Information screen with the Outlet field appropriately filled (see Section 5.8.2 Selecting an Outlet in the Command Button Functionality section).

Note: *If the mailing contains Machineable mail, the mail must be placed in hard-sided containers and inducted at one of the approved mechanized plants. For a List of Approved Mechanized Plants, see Appendix 1.*

Address Accuracy %
Not applicable for Unaddressed Admail and International Incentive Letter-post, Basic Lettermail and Basic International/USA Letter-post.

Enter the declared Address Accuracy rate for the customer based on your Statement of Accuracy (SOA) as generated by a CPC recognized software and rounded to one decimal point (e.g. 93.43% = 93.4%). Address Accuracy measures the percentage of correctly addressed items meeting the Canadian Addressing Guide in a customer's mailing list. An adjustment is automatically calculated for any SOA less than 94.5%. This field is mandatory if an Address Accuracy Expiry Date has been entered. A copy of your SOA must be kept on file and provided to CPC upon request.

Note: *Address Accuracy is required for all domestic Incentive Lettermail items.*
Address Accuracy applies to all Addressed Admail, Publications Mail and Catalogue Mail items exceeding the minimum volume thresholds. See the appropriate product Customer Guides or ask your sales representative for details.

Address Accuracy Expiry Date
Not applicable to Unaddressed Admail and International Incentive Letter-post, Basic Lettermail and Basic International/USA Letter-post.

Enter the expiry date of your Statement of Accuracy (format YYYYMMDD). The SOA expiry date is one year from the run date of the SOA. This field is mandatory if an Address Accuracy % has been entered.

Method of Payment *
From the drop-down list, select your primary method of payment for the mailing. 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.

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

Date of Mailing *
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.

Delivery Mode Audit Code (DMC)
Not applicable to Catalogue Mail, Unaddressed Admail, Basic International/USA Letter-post and International Incentive Letter-post.

Enter the alpha character of the DMC data version used. The DMC is used to identify the data version of the National Presortation Schematic (NPS) used to sort the mailing. A new version of the data is provided by CPC every month and reflects the most current changes to the delivery routes.

Publication Title
Applicable for Publications Mail only.

Enter your Publication Title. This field identifies the name of the publication being issued by the customer and is used to confirm eligibility for Publications Mail. It should be identical to the title listed on the Publications Mail Supplement of the Agreement Activation Form.

PAP Registration No.
Applicable for Publications Mail only.

For publications eligible under the Publications Assistance Program (PAP), enter the Registration Number. This number is assigned to a Canadian Publication eligible for a postal subsidy from the Department of Canadian Heritage. Upon clicking the **Preview** command button, the Publication Title associated with the PAP Registration No. will be retrieved and saved as part of the order.

Issue Date *
Applicable for Publications Mail only.

Enter the issue date of the publication (YYYYMMDD). If seasonal or text, use a representative date. For example, for Winter 2001, enter 20011231 to conform to the date format.

Mailing Type
Applicable to Catalogue Mail, Unaddressed Admail and Addressed Admail.

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).

Note: Partial mailings are not permitted for domestic Lettermail, International Incentive Letter-post and Basic International/USA Letter-post.

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

Shipment X of Y
Applicable to Catalogue Mail, Unaddressed Admail and Addressed Admail.

Enter the shipment number and total number of shipments for partial shipments. For example, Shipment 1 of 2, etc.

Number and Types of Containers
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.

Small Bags (Fabrene or Canvas)
Enter the number of small fabrene or small canvas bags used to hold the mailing.

Large Bags (Fabrene or Canvas)
Enter the number of large fabrene or large canvas bags used to hold the mailing.

Hard Sided (Flats Tub or Lettertainer)
Enter the number of hard-sided Flats Tubs or hard-sided Lettertainers used to hold the mailing. A Flats Tub is a hard-sided container used primarily to transport large items (Oversize (O/S) mail) and a Lettertainer is a hard-sided container used for the transport of small and medium items (Short and Long (S/L) mail).

Note: All Incentive Lettermail must be placed in a hard-sided container.

If the mailing contains Machineable mail, the mail must be placed in hard-sided containers and inducted at one of the approved mechanized plants. For a List of Approved Mechanized Plants, see Appendix 1.

4.9.2 The Items Section

The following are general descriptions of the fields in the Items section.

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

Size
Applicable to Addressed Admail Only.

Select the size from the drop-down list that indicates the size of the mail items to be entered on the Statement of Mailing. Sizes include:

- Short/Long (S/L)
- Oversize (O/S)
- Small
- Medium
- Large

Note*:   You may not combine items that are both Short/Long, Oversize or Dimensional Addressed Admail Small, Medium or Large on the same SOM. Please prepare separate SOM's for each type.*

Meter Each Item at Full Rate
Applicable to Addressed Admail Only.

Check this box if you are going to determine the exact price for each piece of mail and meter each item using this full rate. The metered rate is the rate of postage on the meter impression attached to each piece of mail being deposited. If you do not check this box, the metered rate for each piece of mail will be calculated at the rate of the lowest priced piece.

Note*:   If your total metered postage is less than the total amount due, you must enter the Account number from which you wish to pay the balance owing. A cheque should accompany the mailing OR you must ensure that there are sufficient funds in this account to cover the balance. If you would prefer to pay the difference with meter tape impressions, please use the Additional Metered Amount field. Metering is not available for Dimensional Addressed Admail.*

Apply Same Weight to All Items
Applicable to Publications Mail and Addressed Admail.

Click this box if all the pieces in the mailing are the same weight. If you choose to click this box, the Weight per Piece field will be automatically populated once your first entry is completed.

If your mailing contains pieces of varying weights within the same weight band price point, use the Calculator icon to calculate the weighted average weight.
*Mailed Pieces Over 14" x 6"(35.56 x 15.24 cm)
Service Description *
Choose the appropriate Service Description option from the drop-down list.

Eligible for PAP
Applicable to Publications Mail Only.

Click this box if the line item is eligible under the Publications Assistance Program (PAP).

No. of Pieces *
Enter the total number of pieces being mailed for each Service Description option.

Note: For those Service Descriptions where the number of pieces deposited is less than the minimum volume, an applicable Phantom price will be charged on the difference between the required minimum volume and the actual volume deposited.

For Addressed Admail, a Phantom amount is not acceptable when mixing Machineable with Letter Carrier Presort.

For Publications Mail, the number of pieces you declare in this field are used to calculate the PAP subsidy if you select the Eligible for PAP checkbox. Pieces in the issue that are not eligible for the subsidy must be declared on a separate line item. Since not all pieces may be eligible, the sum of the No. of Pieces field values may be greater than the total number of eligible pieces. Ensure that you have entered your PAP Registration number at the top of the Mailing Information section and that your designated PAP authority signs Copies 1 and 2 of the printed SOM. For eligible Bundles of Unaddressed Copies, enter only the number of bundles in the deposit, not the number of copies in each bundle.

For Unaddressed Admail, the No. of Pieces field is DISPLAY-ONLY. This field will be populated by the system and derived by summing the Total Pieces Shipped for Delivery fields (from the Delivery Installation Detail screens) associated to the given SOM line item.

Total Weight *
Applicable to International Incentive Letter-post only.

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

Note: For International Air Incentive or International Surface Incentive mail, enter the total **NET** weight for each Service Description (in kilograms). For International Air Incentive items, enter the item weight in grams.

Weight per Piece *
Not applicable to International Incentive Letter-post.

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

If the mailing contains items of varying weights within the same weight band price point, use the Calculator icon to the right of the Weight per Piece field to calculate the weighted average weight. See Section 5.8 Command Button Functionality.

Note: Within the Lettermail selection, the following are rated in kilograms (kg):

- USA Printed Papers "M" Bags
- Intl Printed Papers "M" Bags

For the Service Description Bundles of Unaddressed copies in Publications Mail, weight per piece should indicate the average weight of a Bundle of copies (in kilograms), not the weight of each individual copy. For example, if there are 10 Bundles in the mailing, the total weight of all Bundles divided by 10 will give you the average weight of each bundle.

Unit of Measure
Label not shown on screen.

This is a derived field that displays the unit of measure ('g' or 'Kg') for which the user is to enter the weight. The value displayed is dependent on the selected Service Description and the weight information must be entered in the unit of measure displayed by the application.

Metered Rate
Applicable to Addressed Admail only.

Enter the metered rate for the line item. The user can choose to enter the Metered Rate or have the system calculate the metered rate. The system calculates the rate and displays it in the Addressed Admail Preview page in the Metered Rate Column.

Note: Metering is not available for Dimensional Addressed Admail.

Transport Pieces
Applicable to Unaddressed Admail only.

This field is DISPLAY-ONLY. It will be populated by the system and derived by summing the Total Pieces Shipped for Delivery values of those Delivery Installations for which the Transportation Required option has been selected.

ADS Form Indicator
Applicable to Unaddressed Admail only.

This box is display-only and indicates whether or not Automated Delivery Slip (ADS) information exists for the SOM line item in question. See Section 5.3 Creating Admail Delivery Slips for Unaddressed Admail for ADS functionality.

Registered Mail
Applicable to Lettermail including Basic International/USA Letter-post and International Printed Papers (Air).

Click this box if the registered mail option applies to the mail items of the given line item. If Registered Mail does not apply to all mail for the given service description, a separate line must be created for that component of the mailing with the Registered Mail box not checked.

Registered Advice of Receipt
Applicable to Lettermail including Basic International/USA Letter-post and International Printed Papers (Air).

Click this box if the registered advice of receipt option applies to the given line item. If Registered Advice of Receipt does not apply to all mail for the given service description, a separate line must be created for that component of the mailing with the Registered Advice of Receipt box not checked.

Additional Metered Amount
Applicable to Addressed Admail Only.

If your total metered postage is less than the total amount due and you wish to pay the difference with meter tape impressions, enter the additional metered amount attached to the mailing. This amount must equal the total amount due. You may pay this amount by printing a separate meter impression and then attaching this to your SOM at the time your mailing is deposited. You may also pay by applying the remainder of this to your account.

Note: Metering is not available for Dimensional Addressed Admail.

Save As Template
Click this box if the data on this page should be saved in a template upon successful preview of the data. Your SOM must be completely error-free in order to be saved as a template. For additional information, see Section 5.7 How to Use Templates.

Template Name
Enter the name of the template you wish to save. For additional information, see Section 5.7 How to Use Templates.

Sort ADS Forms for Printing
Applicable to Unaddressed Admail only.

Select one of the following radio buttons: Delivery Installation Postal Code (default), ADS Reference, Title of Mail Item, Transportation Required or Data Entry Sequence. 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.

Appendix 1 - List of Approved Mechanized Plants

The following outlets are able to accept the deposit of Machineable mail:

Outlet Name	Short and Long	Oversize
St. John's NF	X	
Halifax NS	X	X
Saint John NB	X	
Quebec QC	X	
Montreal - ETC QC	X	X
Ottawa ON	X	X
Toronto - South Central ON	X	X
Toronto - West ON	X	X
Hamilton ON	X	X
London ON	X	X
Windsor ON	X	
Winnipeg MB	X	X
Saskatoon SK	X	
Regina SK	X	
Edmonton AB	X	
Calgary AB	X	X
Vancouver BC	X	X
Victoria BC	X	