

# Creating An Order



## Publications Mail™

## IMPORTANT UPDATES

| DESCRIPTION OF CHANGE |                                    | LOCATION                             |
|-----------------------|------------------------------------|--------------------------------------|
| <b>Amendment v1.0</b> | <b>Posted on November 18, 2016</b> | <b>Effective on January 16, 2017</b> |
| No updates.           |                                    |                                      |

Please note that when there is an amendment or a revision to the document, the version number will be modified as follows:

- an amendment increases the first digit in the version (e.g., version, 3.0)
- a revision increases the second digit in the version (e.g., version 1.1, 1.2)
- the version number restarts at 1.0 every January of a given year.

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# CREATING AN ORDER

The “Creating an Order” module provides general information that you will need prior to depositing your mail. This module includes requirements for providing a sample, paperwork, partial mailings, downstream deposits and using weighted average weight when creating your order.

## 1 PROVIDE A SAMPLE

One representative sample of each item with different physical characteristics (weight, size) must be submitted for review on deposit.

Customers are encouraged to have their mail items verified for compliance prior to depositing their mailing by contacting a Commercial Service Network (CSN) Representative at 1-866-757-5480.

## 2 CREATING AN ORDER (*STATEMENT OF MAILING*)

An *Order (Statement of Mailing)* must be properly completed and transmitted electronically using the Electronic Shipping Tools (EST). Non-transmitted *Orders (Statements of Mailing)* may be subject to a surcharge. For additional information regarding surcharges, visit the “Pricing” module at [canadapost.ca/pmguides](http://canadapost.ca/pmguides).

The use of the EST to prepare and transmit *Orders (Statements of Mailing)* is mandatory.

Special Handling may not be included on the same *Order* as Delivery Facility Presort.

**NOTE:** Delivery standards are calculated from the day of deposit (day 0) plus the number of business days required for delivery. The number of days excludes the day of mailing, weekends and statutory holidays. Weekend and statutory holiday deposits are considered deposited on the following business day.

### 2.1 Electronic Shipping Tools (EST)

Customers have the option of using either the EST Online version or the EST 2.0 version. The EST 2.0 can be downloaded to prepare and transmit *Orders (Statements of Mailing)*.

The EST software is free of charge and can be accessed through the Canada Post website at [canadapost.ca/newuser](http://canadapost.ca/newuser). For technical enquiries, customers can call the Technical Help Line at 1-800-277-4799.

#### 2.1.1 MAILING SUMMARY AND MAILING DETAILS

The *Mailing Summary* includes general information regarding the customer and the presortation software used for mailing. The *Mailing Details* document includes a detailed breakdown of the mail preparation and presortation information.

Canada Post and the SERP (Software Evaluation and Recognition Program) vendors have developed a file import functionality, the Presort Mailing Plan Import Program, which reduces the amount of data that the customer needs to enter when preparing *Orders (Statements of Mailing)*.

The functionality allows customers to import their Mailing Plans directly into the EST, using both the Electronic Shipping Tools (EST) 2.0 and the EST Online versions. The SERP software will also generate the hard copy *Mailing Summary* and *Mailing Details* reports which will only be required upon request by Canada Post.

Visit [canadapost.ca/presortationsoftware](http://canadapost.ca/presortationsoftware) for a list of recognized presortation software vendors.

**NOTE:** Information on how to create a machineable mail import file (optional) is available at [canadapost.ca/est](http://canadapost.ca/est).

## 2.2 Partial mailings and downstream deposits

| REQUIREMENTS               |   |
|----------------------------|---|
| <b>Partial Mailings</b>    | <p>If a mailing is deposited in more than one day:</p> <ul style="list-style-type: none"> <li>the customer must select the <b>Partial Mailing</b> option if using the EST or check the appropriate box on the manual <i>Order (Statement of Mailing)</i></li> <li>the total mailing cost must be declared on the <i>Order (Statement of Mailing)</i> for the entire mailing accompanying the first portion of the mailing. The customer will be invoiced for the total mailing as declared on the <i>Order (Statement of Mailing)</i></li> <li>the <i>Order (Statement of Mailing)</i>, along with one representative sample of each item, must be deposited with the first partial mailing</li> <li>each subsequent individual partial mailing must be accompanied by the applicable copy of the <i>Order (Statement of Mailing)</i> for the declared deposit location identified on the <i>Order (Statement of Mailing)</i></li> <li>each individual partial mailing must meet the minimum volume requirement of 500 items for Machineable Mail and 1,000 items for Special Handling mail (For Publications Mail, 50 items for the Delivery Facility Presort option)</li> <li>all partial mailings within an <i>Order (Statement of Mailing)</i> must be deposited in full no later than 15 business days from the first deposit date.</li> </ul> |
| <b>Downstream Deposits</b> | <p>For downstream shipments:</p> <ul style="list-style-type: none"> <li>the customer must select the <b>Downstream Mailing</b> option when using the EST 2.0 (not available when using the EST online) or check the appropriate box on the manual <i>Order (Statement of Mailing)</i></li> <li>the <i>Order (Statement of Mailing)</i>, along with one representative sample of each item, must be deposited with the primary mailing as indicated in the "Outlet" field of the <i>Order (Statement of Mailing)</i></li> <li>the copy of the <i>Order (Statement of Mailing)</i> for the declared deposit location identified on the <i>Order (Statement of Mailing)</i> must accompany each subsequent individual downstream shipment.</li> <li>the downstream deposit location is considered the origin for Local, Regional and National designations for Special Handling mailings.</li> </ul>   |

### 2.2.1 WEIGHTED AVERAGE WEIGHT

A mailing may be comprised of items of varying weights (including items above and below the base weight). In such cases, the customer may choose to enter information on the *Order (Statement of Mailing)* using the weighted average weight per item.

Separate average weights can either be calculated by the EST 2.0 or manually and entered on the *Order (Statement of Mailing)* for the following weight categories:

| CATEGORIES                       | SIZE / ITEM           | WEIGHT CATEGORIES |                          |
|----------------------------------|-----------------------|-------------------|--------------------------|
| <b>Machineable</b>               | Standard              | 0 to 50 g         | N/A                      |
|                                  | Oversize              | 0 to 100 g        | Over 100 g up to 500 g   |
| <b>Special Handling</b>          | Standard and Oversize | 0 to 200 g        | Over 200 g up to 1.36 kg |
| <b>Delivery Facility Presort</b> | Standard and Oversize | 0 to 100 g        | Over 100 g up to 1.36 kg |

**NOTE:** Customers accessing the Special Handling presortation option must enter price calculations on the *Order (Statement of Mailing)* for each sortation level.

When customers enter the individual weights in the EST 2.0, the application determines the appropriate weight bands. In the *Order (Statement of Mailing)* one line is created for each weight band with the proper quantity and average weight. The *Order (Statement of Mailing)* displays both the actual weight and the calculated average weight. Customers still have the option to enter an average weight.

**Example** – A customer has a mailing of 5,000 items of Special Handling. The mailing is comprised of various weights above and below 200 g. In this example, two calculations of average weight must be completed and entered separately on the *Order (Statement of Mailing)* for pricing purposes: one entry for the portion of the mailing up to 200 g and one entry for the portion over 200 g.

**Weighted average weight calculation – up to 200 g**

| SPECIAL HANDLING | A               | B               | C               | D   |
|------------------|-----------------|-----------------|-----------------|---|
|                  | NUMBER OF ITEMS | WEIGHT PER ITEM | TOTAL WEIGHT    | TOTAL (C) DIVIDED BY TOTAL (A)<br>= WEIGHTED AVERAGE WEIGHT |
|                  | 1,500           | 30 g            | 45,000 g        |   |
|                  | 500             | 45 g            | 22,500 g        |   |
| <b>Total</b>     | <b>2,000</b>    |                 | <b>67,500 g</b> | <b>33.8 g</b>   |

**Weighted average weight calculation – over 200 g**

| SPECIAL HANDLING | A               | B               | C                | D   |
|------------------|-----------------|-----------------|------------------|---|
|                  | NUMBER OF ITEMS | WEIGHT PER ITEM | TOTAL WEIGHT     | TOTAL (C) DIVIDED BY TOTAL (A)<br>= WEIGHTED AVERAGE WEIGHT |
|                  | 1,000           | 255 g           | 255,000 g        |   |
|                  | 2,000           | 260 g           | 520,000 g        |   |
| <b>Total</b>     | <b>3,000</b>    |                 | <b>775,000 g</b> | <b>258.3 g</b>  |