

CANADA POSTES  
POST CANADA

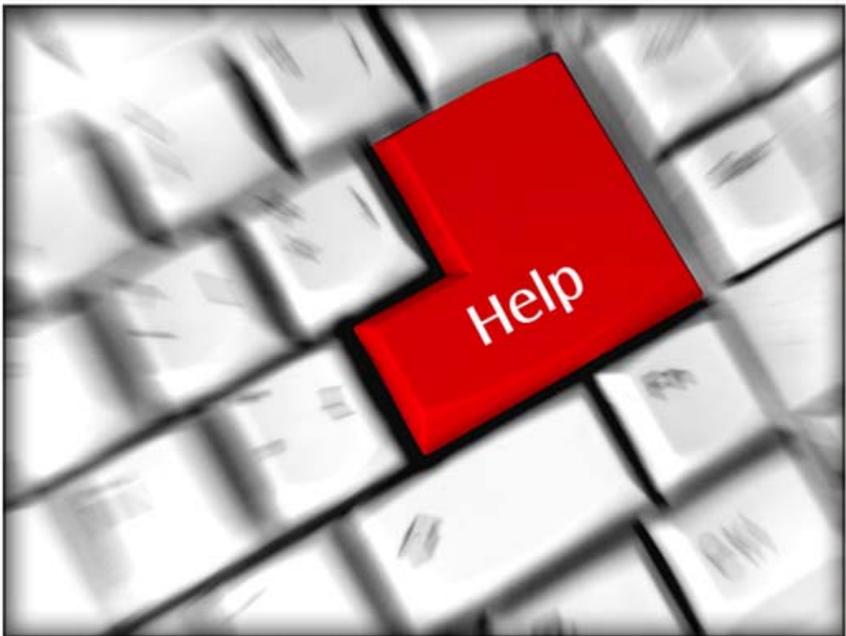


Electronic  
Shipping Tools

User Guide

Online Version

Order Entry



Communications Services Guide

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# 1.0 Introduction

## About Electronic Shipping Tools (EST)

This guide is designed to help you learn the basic functions of *EST Online* version in order to enable you to prepare your Communications Services orders. It takes you through the process of completing your Statement of Mailing (SOM) electronically, beginning with data entry into the application, along with the validations that will take place, functionalities of the command buttons and templates, through to transmitting and printing your SOM.

### **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 data entry.

For more details on any aspect of our EST application, click here and choose from the various topics displayed on this page. For technical assistance, please contact the EST Help Desk weekdays at 1 800 277-4799, from 07:00 am to 20:00 pm (Eastern Standard Time). For more detailed information about Canada Post's products and services, please visit our Web site at [canadapost.ca](http://canadapost.ca), or consult Canada Post Postal Services Information at [canadapost.ca/postalservices](http://canadapost.ca/postalservices)

## Communications Services Offerings

**Note: This guide is designed to cover all Communications Services Offerings listed below except for Unaddressed Admail.**

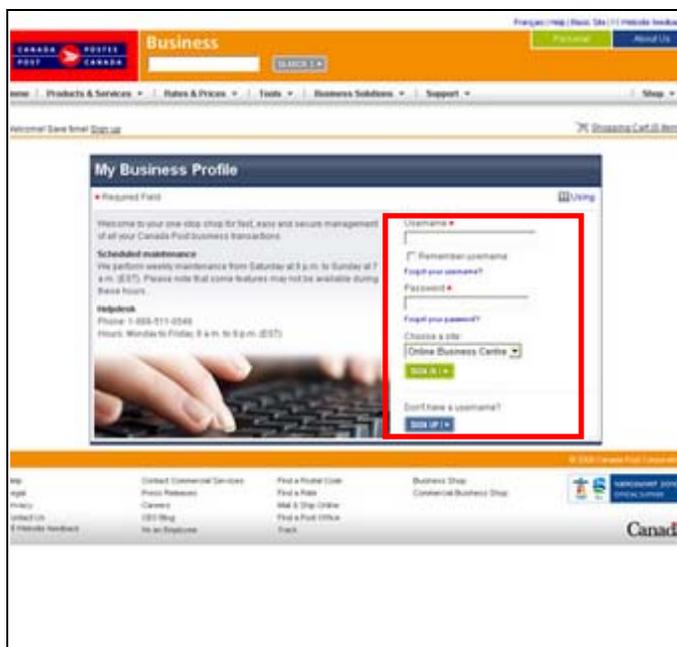
**Unaddressed Admail will be covered in separate guides.**

The following Communications Services mailings can be made using *EST*:

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

For more detailed information about Canada Post's products and services, please visit our Web site at [canadapost.ca](http://canadapost.ca), or consult Canada Post Postal Services Information at [canadapost.ca/postalservices](http://canadapost.ca/postalservices)

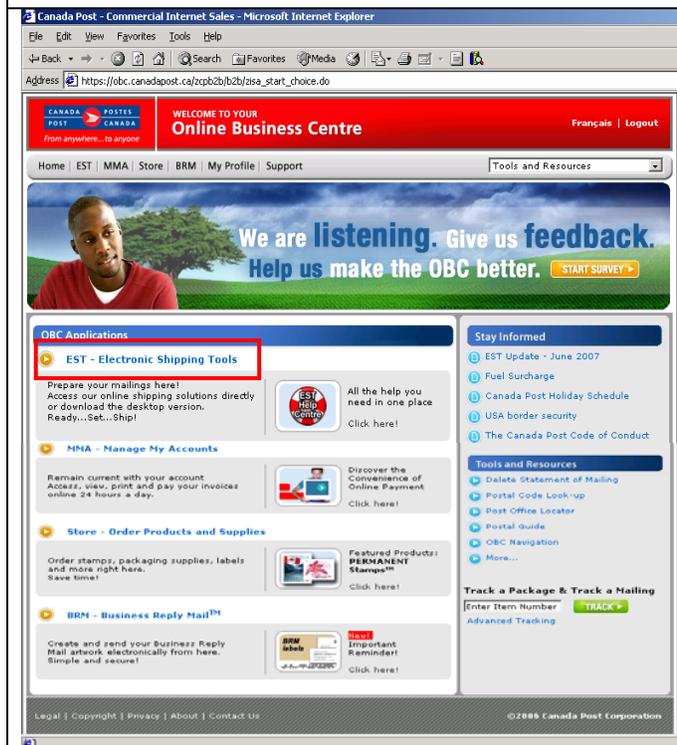
## 2.0 Using the Online version



Before you begin, please ensure that you have the following information:

- Your Canada Post customer number, your Contract Number (when applicable). If you do not have a customer number and contract number, or if you don't remember them, simply call our Business Sales Centre (BSC) at **1-800-260-7678**. If you are a new customer, you will be asked to fill out a credit application.
- Your Username and Password to Sign in to the Online Business Centre: [canadapost.ca/obc](http://canadapost.ca/obc) You can then access the OBC and the Electronic Shipping Tools EST. You may also register for a User ID and a Password by calling **1-877-376-1212**

Once you have obtained all the information stated above, enter the Canada Post Web site at: [canadapost.ca/obc](http://canadapost.ca/obc) When this page is displayed: you simply enter your Username and Password and click Sign In.



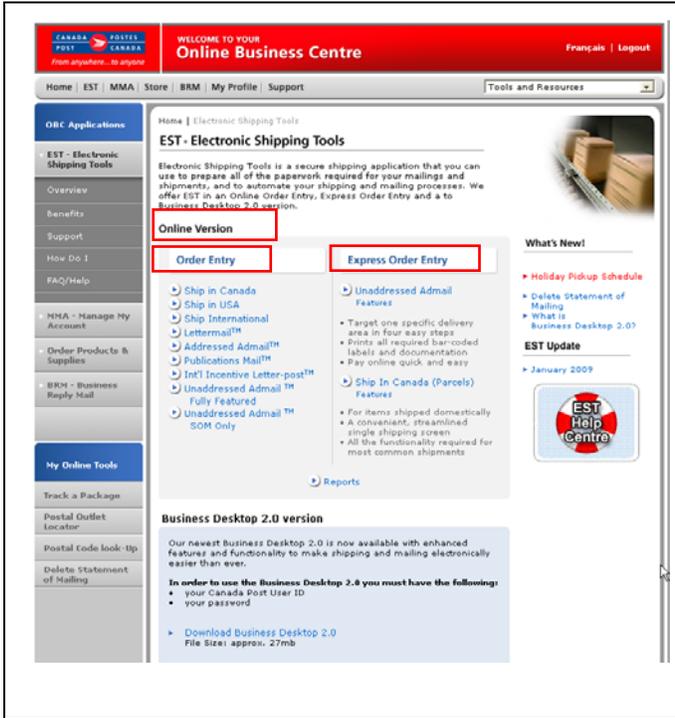
The Welcome page to the Online Business Centre is displayed. Click “” beside the EST - Electronic Shipping Tools quadrant.

This will bring you to the *Electronic Shipping Tools (EST)* landing page where you will be able to select the Service for data entry and prepare the paperwork for your mailing.

# 3.0 Creating Your SOM

Creating an *Electronic Statement of Mailing (SOM)* is simple – there are **only a few steps** involved in creating a SOM. This software tool guides you in capturing customer information and your mail deposit, calculates your postage and prints your SOM, reducing complexity and saving you valuable time.

## 3.1 Communications Services

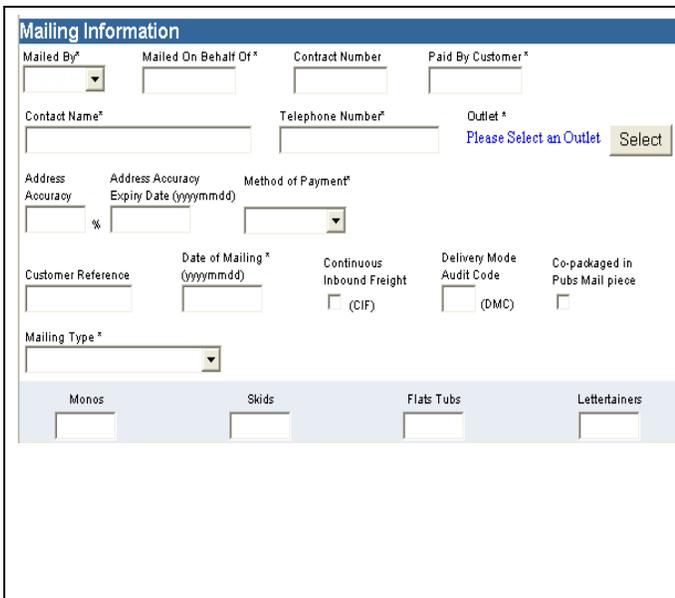


This is the EST landing page that will allow you to create a SOM.

Select a Service Offering for which a SOM will be created.

The service offerings available for Communications Services are included in the section entitled *Online Version*. Selecting a service will open the appropriate data entry screen.

## 3.2 Mailing Information Section



Enter your Mailing Information

From here you may begin to capture the information required for the mailing you want to do.

**Note:** Mandatory data elements are highlighted with an asterisk (\*).

The Mailing Information section of the data entry screen contains customer information required to ensure accurate pricing and billing (where applicable) for the transaction.

**Note:** The Communication Services page for Lettermail will be used for illustration throughout this document. There are a few differences with respect to the information you are required to enter for each service offering.

The following table provides a description of the FIELDS component of the Mailing Information section.

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

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

Fields	Description
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 <i>Preview</i> button: <ul style="list-style-type: none"> <li>➤ The Service Descriptions selected are valid for the Contract Number, and</li> <li>➤ The “Mailed On Behalf Of” Customer Number is authorized to use the Contract Number.</li> </ul> <b>Note:</b> For Addressed Admail, the following Service Descriptions require a contract number: <i>Machineable Mail (MM)</i> , <i>Machineable Presort (MP)</i> and <i>Letter Carrier Presort (LCP)</i> .
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*	Click on the <i>Select</i> command button to select a post office (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 a Post Office by Province and City or by Post Office Number. Upon clicking on a post Office, the user is returned to the Mailing Information screen with the Post Office field appropriately filled.  <b>Note:</b> If the mailing contains Machineable mail, the mail must be placed in hard-sided containers and inducted at one of the approved CPC mechanized post offices.
Address Accuracy %	<b><i>Not applicable for International Incentive Letter-post, Basic Lettermail and Basic International/USA Letter-post.</i></b> 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 <i>Canadian Addressing Guide</i> in a customer's mailing list. An adjustment is automatically calculated for any SOA less than 94.5%. This field is mandatory if an <i>Address Accuracy Expiry Date</i> has been entered. A copy of your SOA must be kept on file and provided to CPC upon request. <b>Note:</b> Address Accuracy is required for all domestic Incentive Lettermail items. Address Accuracy applies to all Addressed Admail and Publications Mail items exceeding the minimum volume thresholds. See the appropriate product Customer Guides or ask your sales representative for details.

Address Accuracy Expiry Date (YYYYMMDD)	<p><b><i>Not applicable to International Incentive Letter-post, Basic Lettermail and Basic International/USA Letter-post.</i></b></p> <p>Enter the expiry date of your Statement of Accuracy (SOA) (format YYYYMMDD). The SOA expiry date is one year from the run date of the SOA. This field is mandatory if an <i>Address Accuracy %</i> has been entered.</p>
Method of Payment *	<p>From the drop-down list, select your primary method of payment (MOP) for the mailing. There are three valid methods of payment available:</p> <ul style="list-style-type: none"> <li>➤ <b>Account</b> – 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.</li> <li>➤ <b>Metered</b> – refers to a mailing that will be paid by placing a meter impression on each item of mail to sufficiently cover the cost of mailing.</li> <li>➤ <b>Credit Card</b> - refers to a payment made by a customer to cover current and future mailings, which will be posted to the customer’s credit card.</li> </ul> <p><b>Note: Venture 1 customers are required to enter their Credit Card Verification Number in the Credit Card Information pop-up window</b></p> <p>For Publications Mail and International Incentive Letter-post, ‘Metered’ is not a valid method of payment.</p>
Selected Credit Card	<p>This mandatory field becomes enabled if the MOP selected is Credit card; select from the drop down list the desired credit card to which mailings will be charged.</p>
Acquisition Admail Code	<p><b><i>Applicable to Addressed Admail</i></b></p> <p>To complete an Acquisition Admail delivery order, customers must start with an Addressed Admail SOM. Customers must enter the unique code they have received with their list order, and click “Preview”.</p> <p><i>Note: Acquisition Admail is a Direct Mail solution that provides access to accurate lists of Canadian residential, business and multi-unit building addresses. Customers can choose from two options: Acquisition List, a flexible address list rental option, or Acquisition List Plus, which provides access to special list and postage rates.</i></p> <p><i>Acquisition List Plus:</i> Customers will receive a unique Acquisition Admail Code associated with their list order. This code provides Customers access to the Acquisition Admail special postage prices.</p>
Customer Reference Number	<p>This is an alphanumeric field for your internal use that will appear on your Invoice/Transaction Record</p>
Date of Mailing *(YYYYMMDD)	<p>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.</p> <p><b>Note:</b> You will not be able to create and transmit your form with a mailing date that is prior to the current date.</p>
Continuous Inbound Freight (CIF)	<p><b><i>Not applicable to International Incentive Letter-post and Basic International/USA Letter-post.</i></b></p> <p>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.</p>

Delivery Mode Audit Code (DMC)	<p><b>Not applicable to Basic International/USA Letter-post and International Incentive Letter-post.</b></p> <p>Enter the alpha character of the Delivery Mode Code (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 NPS data is provided by CPC every month and reflects the most current changes to the delivery routes</p>
Co-packaged in Pubs Mail piece	<p><b>Applicable to Lettermail, Addressed Admail, Publications Mail.</b></p> <p>Co-packaging is the inclusion of an item of Addressed Admail or Lettermail (or a separate host publication) with the host publication within a Publications Mail item.</p> <p>Co-packaged items are priced as if they were mailed separately and must be entered on separate <i>Orders (Statements of Mailing)</i>.</p>
Publication Title	<p><b>Applicable to Publications Mail only.</b></p> <p>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</p>
Issue Date* (YYYYMMDD)	<p><b>Applicable to Publications Mail only.</b></p> <p>Enter the issue date of the publication (YYYYMMDD). If seasonal or text, use a representative date. For example, for Winter 2001, enter 20011231 to comply to the date format</p>
Mailing Type*	<p><b>Applicable to Addressed Admail and Publications Mail.</b></p> <ul style="list-style-type: none"> <li>➤ Select <b>“Full Mailing – One Deposit”</b> if entire mailing is deposited at one time.</li> <li>➤ Select <b>“Partial Mailing</b> if the mailing will be inducted in multiple shipments over one or more days (not to exceed 15 days).</li> </ul> <p>If this field is left blank, error messages will instruct you to select a Mailing Type.</p> <p><b>Note: Partial mailings</b> are not permitted for domestic Lettermail, International Incentive Letter-post and Basic International/USA Letter-post.  <b>Partial mailings must be paid for, in their entirety, with the first deposit.</b></p>
Number and Types of Containers:	<p>Enter the number corresponding to 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.</p>
➤ Monos (Full and Partial Mailing)	<p>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 post offices.</p>
➤ Skids (Full and Partial Mailing)	<p>Enter the number of skids used to hold the mailing. A skid, also referred to as a pallet, is a wooden/plastic/aluminium platform for the conveyance of containers.</p>
➤ Boxes (Full and Partial Mailing)	<p>Enter the number of boxes used to hold the mailing.</p>
➤ Flat Tubs (Full and Partial Mailing) Lettertainers	<p>Enter the number of hard-sided Flat Tubs or hard-sided Lettertainers used to hold the mailing. A Flat 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).</p> <p><b>Note:</b> All Incentive Lettermail must be placed in a hard-sided container.</p> <p>If the mailing contains machineable mail, the mail must be placed in hard-sided</p>

	containers and inducted at one of the CPC approved mechanized mail processing plant.
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	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 <i>Additional Metered Amount</i> field. Metering is not available for Dimensional Addressed Admail.
Apply same weight to all items	<b><i>Applicable to Publications Mail and Addressed Admail.</i></b>  Click this box if all the pieces in the mailing are of the same weight. If you choose to click this box, the <i>Weight per Piece</i> field will automatically populate once your first entry is completed. If your mailing contains pieces of varying weights within the same weight band price point, use the <i>Calculator</i> icon to calculate the weighted average weight.
Service Description*	Choose the appropriate Service Description option from the drop-down list.
No. Of Pieces*	Enter the total number of pieces being mailed for each Service Description option. <b>Note:</b> 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 <b><i>Addressed Admail</i></b> , a Phantom rate is not acceptable when mixing Machineable with Letter Carrier Presort.
Weight per Piece *	<b><i>Not applicable to International Incentive Letter-post.</i></b>  Enter the weight per piece for the specific line item. The weight is necessary to calculate postage costs. For mailing containing items of varying weights within the same weight band price point, use the <i>Calculator</i> icon to the right of the Weight per Piece field to calculate the weighted average weight. In <b><i>Publications Mail</i></b> , the Service Description “PM Bundles Unaddressed Copies” 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 for each bundle.
Total Weight (Kg)	<b><i>Applicable to International Incentive Letter-post only.</i></b>  Enter the weight for the specific line item. The weight is necessary to calculate postage costs. <b>Note:</b> For International Premium Incentive or International Standard Incentive mail, enter the total NET weight for each Service Description (in kilograms). For International Per Item Incentive items, enter the item weight in grams.

Unit of Measure	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.
Registered Mail	<b><i>Applicable to Lettermail including Basic International/USA Letter-post.</i></b>  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	<b><i>Applicable to Lettermail including Basic International/USA Letter-post.</i></b>  Click this box if the <i>Registered advice of receipt</i> 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 <i>Registered Advice of Receipt</i> box not checked.
Metered Rate	<b><i>Applicable to Addressed Admail only.</i></b>  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.  <b>Note:</b> Metering is not available for Dimensional Addressed Admail.
Additional Metered Amount	<b><i>Applicable to Addressed Admail Only.</i></b>  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.  <b>Note:</b> Metering is not available for Dimensional Addressed Admail.
Cost Centre Reference	This field appears when the <i>Enable Cost Centre Reference</i> checkbox has been selected. The data captured in this field appears on your electronic invoice file via <i>PosteCS</i> , allowing you to allocate costs internally at the line item level.
Save as Template	Click this box if the data on this page should be saved in a template following a successful preview of the data. Your SOM must be completely error-free in order to be saved as a template.
Template Name	Enter the name of the template you wish to save.

The following table provides descriptions for the COMMAND BUTTONS functionality.

Command buttons	Result of Invocation
Retrieve	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.

Select	Clicking this button will open another page from which you will be able to search and select a post office** for induction of your mail. The Post office identifies the name and number of the CPC location where the mail is brought for induction into CPC's mail stream.
Preview	Once all the required data has been entered, you can generate a preview of the electronic statement of mailing (SOM) by clicking on the <i>Preview</i> button. This will trigger a validation sequence against Canada Post database. If no errors are found, Adobe Acrobat will be launched in your browser page. A preview of your electronic SOM will be displayed containing the data you entered and the price calculation based on your data. You should verify that the information presented is accurate before you transmit the SOM.  If errors are found, a message is displayed indicating what caused the error. Upon correcting the information with no additional errors being found, preview your order once again.
Clear	When you click on the <i>Clear</i> button, all the fields are cleared. Use this button when you want to start over with data entry.
Add Pub Mail Lines	<b><i>Applicable to Publications Mail Only.</i></b> By clicking this box 5 additional lines can be added at a time.

The following table provides a description for the Select Outlet/Induction Point POP UP SCREEN

	<p>When you deposit your Items at a different Outlet, the page Select Outlet/Induction Point is displayed. Simply follow the instructions:</p> <ul style="list-style-type: none"> <li>➤ Select from either the “Major Postal facilities only” or “All postal facilities” list by choosing the appropriate radio button.</li> <li>➤ Select a Province</li> <li>➤ Select a City</li> <li>➤ Click Search</li> </ul> <p>A list of Outlets will be displayed. Select the outlet and the name will be populated on the data entry page.</p> <p><b>Note:</b> If you know the Outlet Number, enter the number in the Outlet No. box and click on the <i>Search</i> button. You can also select an outlet by clicking on the Outlet Name link.</p>
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The following table provides descriptions of the FIELDS component.

Fields	Description
Search Outlet/ Induction Point	Select “Major Postal facilities only” or “All Postal facilities” to search for the Outlet/Induction Point where your mailing will be deposited.
Province (Drop-Down List)	Allows you to perform a search by province.
City (Drop-Down List)	When you select or change a province, the city list is filtered based on the chosen province.
Outlet Number	Allows you to perform a search by Outlet Number (has precedence over other search criteria).
Search	Extracts all Outlets that match the Outlet Number (if entered), or the province and city (if both entered). Populates the Outlet list with matching records.
Outlet List	Displays the records matching the search criteria. Allows you to select an Outlet from the list and see the details about that postal facility.



## 4.0 Previewing & Reviewing your SOM

The Preview option allows you to review 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.

Preview for Lettermail - March 28, 2006

Outlet: OTTAWA MPP 1077  
 Date of Mailing: 2006/03/28  
 Contract Number: 0040064063  
 Customer Reference:  
 DMC:  
 Address Accuracy %: 95.0  
 Addressed Accuracy Expiry Date: 2006/12/31  
 CI Freight: No  
 Mailed By  
 Company Name: PROCIMPR CUST DO NOT USE-005  
 Customer Number: 0007023210  
 Contact Name: Alfred Papy  
 Telephone Number: 613-734-7308  
 Address: 502 MAIN ST N, MONTREAL, QC, H2B 1A0  
 Mailed on Behalf Of  
 Company Name: MINISTERE DES SERVICES GOUVT  
 Customer Number: 0002501724  
 Paid By Customer Number: 0002501724  
 Method of Payment: Metered

Please review and ensure correct prior to transmitting to Canada Post

Transmit to CPC Back

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. Documents can be reprinted within 24 hours from Current Orders.

Note the information provided to Canada Post is subject to verification. Therefore, if items actually presented to Canada Post are inconsistent with the information provided (incorrect category, volumes, weights, preparation, missing surcharges etc.) prices may be adjusted and/or additional charges added as provided for in the Customer's Agreement with Canada Post. The Customer agrees that such price changes are to be automatically applied to the Customer through the same method of payment chosen by the Customer for the Order (credit card or Canada Post account), with no further notice required to the Customer from Canada Post.

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 page.

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).

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 Deposit location equals the Post Office selected at the data entry page, whether or not it is where you are inducing the mail. This allows you to pay the entire mailing at one location while depositing the mail at a different location.

Method of Payment: Metered

No. of Containers (Full Mailing Type)						
Monos	Skids	Small Bags		Large Bags		Hard Sided
		Fabrene	Canvas	Fabrene	Canvas	Flats Tubes Lettertainers

Service Description	Pieces	Weight	Price/Piece (\$)	Price/kg (\$)	Metered Rate	Options Code	\$	Total Cost (\$)
Standard Letters	1,000	30.00 g	0.510		0.510		\$0.00	\$510.00
<b>TOTAL</b>	<b>1,000</b>	<b>30,000 kg</b>					<b>\$0.00</b>	<b>\$510.00</b>

Address Accuracy Adjustment:  
 Phantom Adjustment:  
 Sub-total Before Taxes: \$510.00  
 Less Total Calculated Metered Postage: \$510.00  
 Sub-total Before Taxes: \$0.00  
 GST/HST (\$0.00) PST (\$0.00) \$0.00  
 Total Amount Due: \$0.00

Please review and ensure correct prior to transmitting to Canada Post

Transmit to CPC Back

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. Documents can be reprinted within 24 hours from Current Orders.

Note the information provided to Canada Post is subject to verification. Therefore, if items actually presented to Canada Post are inconsistent with the information provided (incorrect category, volumes, weights, preparation, missing surcharges etc.) prices may be adjusted and/or additional charges added as provided for in the Customer's Agreement with Canada Post. The Customer agrees that such price changes are to be automatically applied to the Customer through the same method of payment chosen by the Customer for the Order (credit card or Canada Post account), with no further notice required to the Customer from Canada Post.

You must verify all the information displayed on this page and ensure that the data is exact before transmitting the order.

As indicated the 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

The following table provides descriptions of the FIELDS component.

Fields	Description
Price/Piece	A calculated field identifying the price of the mail item for a given line item; display only numeric field with the 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.
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.
<b>Options Codes</b>	A calculated field identifying the postage associated to the option selected at the data entry page. Display only numeric field with two decimal places.
Phantom Adjustment	<p>A calculated field identifying the total phantom cost for the mail items of a given line item. Display-only numeric field with two decimal places.</p> <p><b>Note:</b> The total Statement of Mailing phantom cost is determined and then prorated among the relevant line items to obtain an item level cost figure.</p> <p><b>Note: Customers selecting Incentive Lettermail Full Mailings</b> will now receive a message when a better value option is available to them. When minimum requirements are not met with Incentive Lettermail a phantom adjustment is applied. At a certain volume it is to the customer's advantage to declare items at the basic Lettermail rate rather than declare the items at the incentive rate with a phantom adjustment. When a better value option is identified because of low volumes a message opens recommending a better value option and showing the savings if selected. The customer can click OK to automatically convert the item(s) to the better value option.</p>
Address Accuracy Adjustment	A calculated field identifying the total address accuracy 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 item 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 to CPC is equal to the postage plus the adjustments and taxes.

## 5.0 Transmitting your SOM

After verifying that the information in the *Preview* is accurate, click the *Transmit to CPC* command button located at the bottom of your Preview page to send your order electronically to Canada Post.

Preview for Lettermail - March 28, 2006

Outlet:	OTTAWA MPP 1077
Date of Mailing:	2006/03/28
Contract Number:	0040064063
Customer Reference:	
DMC:	
Address Accuracy %:	95.0
Addressed Accuracy Expiry Date:	2006/12/31
CI Freight:	No
Mailed By:	
Company Name:	PROCIMPR CUST DO NOT USE-005
Customer Number:	0007023210
Contact Name:	Alfred Patry
Telephone Number:	613-734-7308
Address:	502 MAIN ST N, MONTREAL, QC, H2B 1A0
Mailed on Behalf Of:	
Company Name:	MINISTRE DES SERVICES GOUVT
Customer Number:	0002501724
Paid By Customer Number:	0002501724
Method of Payment:	Metered

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. Documents can be reprinted within 24 hours from Current Orders.

Note the information provided to Canada Post is subject to verification. Therefore, if items actually presented to Canada Post are inconsistent with the information provided (incorrect category, volumes, weights, preparation, missing surcharges etc.) prices may be adjusted and/or additional charges added as provided for in the Customer's Agreement with Canada Post. The Customer agrees that such price changes are to be automatically applied to the Customer through the same method of payment chosen by the Customer for the Order (credit card or Canada Post account), with no further notice required to the Customer from Canada Post.

The *Transmit to CPC* button will electronically send the SOM transaction to Canada Post when clicked.

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

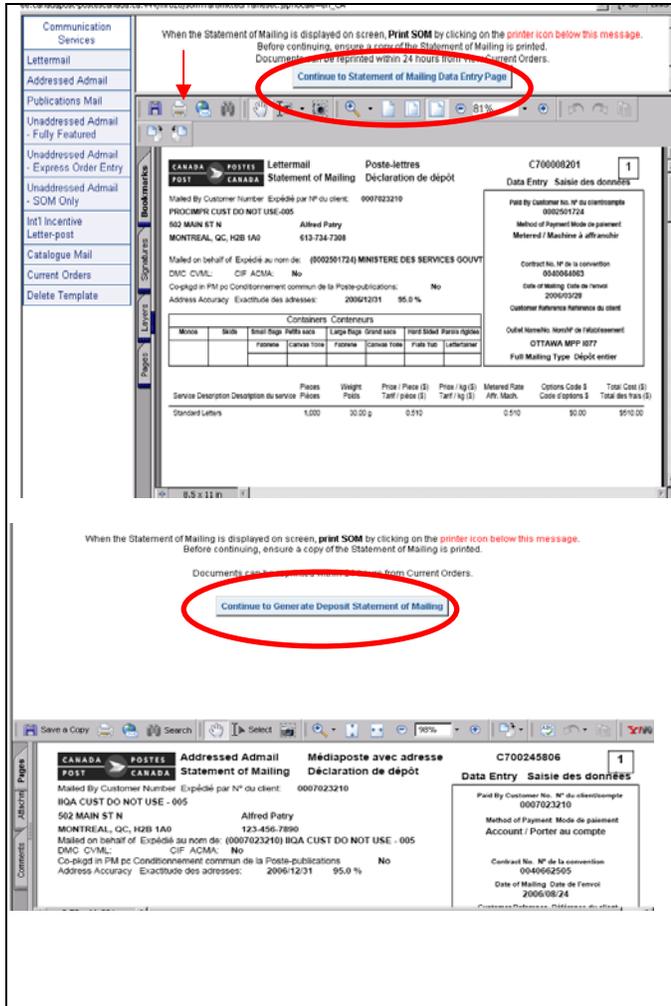
If Canada Post has successfully received the transaction, you will be taken to the *Print SOM* page. As part of the transmission process, the following information is generated:

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

## 6.0 Printing your SOM

The *Print SOM* page is displayed upon the completion of the “*Transmit to CPC*” 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.

A complete Statement of Mailing (SOM) can only be printed after a successful 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 SOM printed, as follows:

- Data Entry
- Accepting Location
- Customer

Bring the first two (2) copies along with the payment to the Payment Post Office location in order to get your mailing accepted by Canada Post

**Note:** The Print SOM page of a Partial mailing will display a “**Continue to Generate Deposit Statement of Mailing**” button instead of the “**Continue to Statement of Mailing Data Entry Page**” button for the Full mailing.

Partial mailings require an original Statement of Mailing and sufficient Deposit copies to cover the entire shipment. Please note that the Deposit copies pages display “**Deposit Copy only**” at the bottom of each Deposit Statements of Mailing.

## 6.1 View Current Orders

The screenshot shows the 'Current Orders' page in the Canada Post Online Business Centre. The page header includes the Canada Post logo and 'WELCOME TO YOUR Online Business Centre'. The left navigation menu has 'Current Orders' highlighted with a red box. The main content area displays a table of orders:

Order Number	Print Count	Service	Document Name	Mailed on Behalf of	Total Cost
C700007883	1	Unaddressed Admail	Statement of Mailing	7023210	\$431.80
	1		Container Labels		
	1		Admail Delivery Slips		

Below the table, a printer icon is highlighted with a red arrow. A note above it reads: 'Click on the printer icon in order to print your document. Please note: To affix the same document on more than one mailing is considered a fraudulent act.' Below the printer icon, there is a 'Close this window' button.

To simplify the creation flow, and to allow you to always have the opportunity to successfully print your documents, a new link **View Current Orders** is added to the Online version of the **Electronic Shipping Tools (EST)** landing page for the **Communication Services**.

Your documents can be reprinted up to 24 hours after their transmission. Simply click on the appropriate document name; the document will then be displayed in a PDF format

Click on the printer icon to print your document.

Note: This functionality is intended to enable you to reproduce the original output documents for your records in the event the original documents were damaged, or you experienced a printer failure. Affixing the same document on more than one mailing is considered a fraudulent act.

## 7.0 Using a Template

Templates allow you to maximize the functionality of EST by giving you the ability to save data entered for re-use when creating another SOM. You are able to create as many as 30 templates that can be associated to your User ID for Communications Services.

### 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 (30). 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:

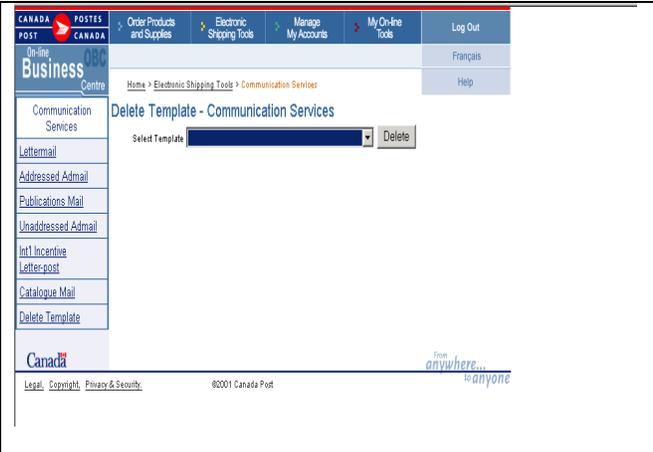
- Mailed On Behalf Of
- Contract Number
- Paid By Customer
- Contact Name
- Telephone Number
- Post Office Outlet
- Address Accuracy Percentage (for all Service Offerings except Int'l. Incentive Letter-post, Basic Lettermail, Basic International/USA Letter-post)
- Address Accuracy Expiry Date (for all Service Offerings except Int'l. Incentive Letter-post, Basic Lettermail, Basic International/USA Letter-post)
- Method of Payment
- Customer Reference No.
- Publication Title (Publications Mail only).
- Mailing Type
- Service Descriptions

## 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. 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 from the one you have currently selected, the appropriate data entry page will be opened.

## 7.3 Deleting a template

	<p>You can delete a template by selecting the <b>Delete Template</b> link from the Navigation Bar on the data entry page. This link will open the Delete Template page.</p> <p>On this page, select a template from the drop-down list and delete it by clicking on the <i>Delete</i> button. You will be asked to confirm whether you wish to delete the selected template.</p>
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## 8.0 Deleting your SOM

The screenshot shows the 'EST - Electronic Shipping Tools' page. In the left-hand navigation menu, under 'My Online Tools', the 'Delete Statement of Mailing' link is highlighted with a red box. The main content area includes sections for 'Online Version' (with links for Order Entry and Express Order Entry), 'What's New!' (with a link for 'Delete Statement of Mailing' highlighted in a red box), and 'Business Desktop 2.0 version'.

This section illustrates the process to delete a SOM.

From the *Electronic Shipping Tools* landing page select **'Delete Statement of Mailing'** which will take you to the SOM deletion form.

### Delete Statement of Mailing

**Enter SOM Details**

Mailed by #	0082138924
Mailed on Behalf of #	Select
Reason for deletion *	Printing Problem
Date Transmitted *	<input type="text"/>
SOM Number	<input type="text"/>
<b>If the SOM # is not known, add the following information:</b>	
Total Number of Pieces	<input type="text"/>
Product Type	<input type="text"/>
Dollar Value of SOM	<input type="text"/>
<input type="button" value="Submit"/> <input type="button" value="Clear"/>	

(\*) Mandatory Fields

You need to provide the following information:

- Mailed by Customer Number
- Mailed on behalf of Customer Number
- Reason for Deletion I.e. printing problem
- Date SOM was transmitted
- Statement of Mailing number

If the user does not have the SOM to refer to, he need to provide the following information:

- Total Number of Pieces
- Product Type
- Dollar Value of SOM

Once the SOM Deletion request is completed, Canada Post will advise you via email.