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# Canada Post

## Neighbourhood Mail™

### How to create an Order (SOM) in EST 2.0

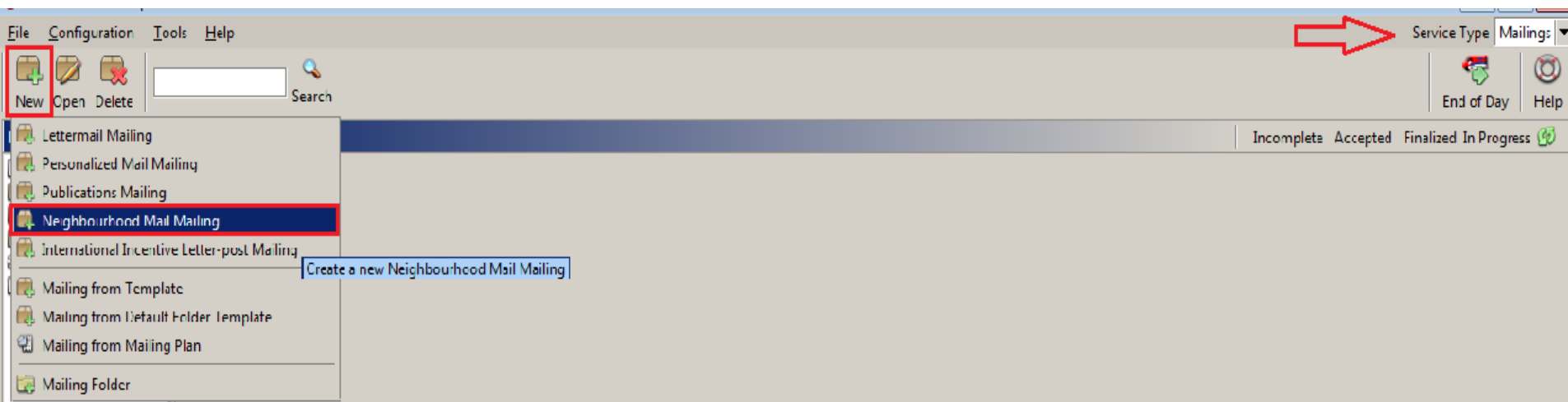


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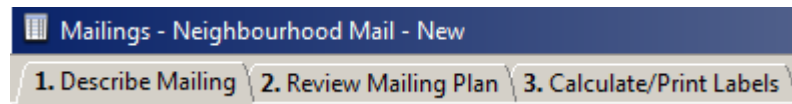
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# It's my first time using Neighbourhood Mail

- First, once you have opened EST 2.0, you must ensure that “**Mailings**” is chosen as the Service Type, located in the top right hand corner (see red arrow below)
- Click the “**New**” button located on the top left corner of the screen and select “**Neighbourhood Mail Mailing**”



- When using Neighbourhood Mail, the screen is broken into three tabs  
*1. Describe Mailing 2. Review Mailing Plan 3. Calculate / Print Labels*



# Describe Mailing Tab

- All yellow fields are mandatory. Once all fields have been completed, click “**Add**” button (a pop-up window will appear, see next slide)

Mailings - Neighbourhood Mail - New

1. Describe Mailing | 2. Review Mailing Plan | 3. Calculate/Print Labels

Billing Information (0007023210 - IIQA CUST DO NOT USE - 005)

Contract - Owner/Alias Name: 0040662505 - IIQA CUST DO NOT USE - 005 | Paid By: 0007023210 - IIQA CUST DO NOT USE - 005 | Method of Payment: Account

Receiving Location: 1086 - LEO BLANCHETTE RVU

Mailing Characteristics

Customer Reference: | Size of Pieces: | Promo Code: |

Pieces are thicker than 1.9 cm (0.75 inch)

Mailing Pieces

**Add** | Update | Cancel | Delete | Bulk Update

You must describe your Mailing Piece by using either Add or Import

Title of Mail...	Version Spe...	Weight	Deposit Loc...	Deposit/Sta...	Pieces	Cost Centre	Reference #1
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**Navigate the windows and menus** using either a mouse or the keyboard.

*Note:* As you move from field to field the application validates the data; you must acknowledge any message and make necessary corrections to the field in order to continue with the data entry.

# Mailing Piece Description pop-up

- On this screen, you need to provide details of the mailing in the “**Piece Description**” area
  - “**References**” information are optional
- (\* This is the date of the first or only deposit = Deliver upon receipt)

**Mailing Piece Description**

**Piece Description**

Title of Mail Piece

Weight per Piece (g)

Parliament Mail

**Deposit Details**

Location

Date

Deposit(s) will be...

This is the date of the first or only deposit

This is the date when delivery must start

**References**

Cost Centre

Reference #1

**Delivery Coverage Filters**

Target Areas  All Types  Houses  Apartments  
 Farms  Businesses

Delivery Modes  All Types  CF  DR  GD  
 LB  LC  MR  RR  SS

Auto-Complete Split Walks

**Geographic Area Quick Select**

Province

Delivery Areas or Postal Codes starting with:

Select

# I am not using Canada Post to transport my items to the Delivery Installation...

- If you are depositing your items directly to the Delivery Installation(s) involved in the delivery, you must choose the Direct to Delivery Installation option in the “**Deposit Details**” section (in the Mailing Piece Description pop-up)

**Mailing Piece Description**

**Piece Description**

Title of Mail Piece

Weight per Piece (g)

Parliament Mail

**References**

Cost Centre

**Delivery Coverage Filters**

Target Areas  All Types  Houses  Apartments  Farms  Businesses

Delivery Modes  All Types  CF  DR  GD  LB  LC  MR  RR  SS

Auto-Complete Split Walks

**Deposit Details**

Location

Date

**Geographic Area Quick Select**

Province

Delivery Areas or Postal Codes starting with:

# Mailing Piece Description pop-up – Continued

- “**Delivery Coverage Filters**” enables you to select the Target Areas and Delivery Modes you wish your items to be delivered to
- When selecting the “**Geographic Area**”, you can type in the name of the City or the FSA (first 3 letters of the postal code) under the Delivery Area (such as Markham)
- Click “**Select**”

**Mailing Piece Description**

**Piece Description**  
Title of Mail Piece: abc2  
Weight per Piece (g): 10  
 Parliament Mail

**Deposit Details**  
Location: 1086 - LEO BLANCHETTE RVU  
Date: 2018/12/26  
This is the date of the first or only deposit  
 Deposit(s) will be done before 11 AM

**References**  
Cost Centre:   
Reference #1:

**Delivery Coverage Filters**  
Target Areas:  All Types,  Houses,  Apartments,  Farms,  Businesses  
Delivery Modes:  All Types,  CF,  DR,  GD,  LB,  LC,  MR,  RR,  SS  
 Auto-Complete Split Walks

**Geographic Area Quick Select**  
Province: Ontario  
Delivery Areas or Postal Codes starting with: Markham

**Geographic Area Selection**

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Houses	Apartments	Farms	Businesses

**Select**

# Mailing Piece Description pop-up – Continued

- The screen will now display the points of call (which represent the total # of mail items) selected
- Click the “+” symbol to expand and validate that the entries are correct
- This will also allow you to select and de-select routes (checkmark)
- Once you have selected the routes you wish to target and you are finished, press the “**Apply(Done)**” button, if you wish to add more areas, select “**Save-Next**”

**Mailing Piece Description**

**Piece Description**  
Title of Mail Piece: Test1  
Weight per Piece (g): 11  
 Parliament Mail

**Deposit Details**  
Location: 086 - LEO BLANCHETTE RVU  
Date: 2019/01/18  
 Deposit(s) will be done before 11 AM

**References**  
Cost Centre:   
Reference #1:

**Delivery Coverage Filters**  
Target Areas:  All Types  Houses  Apartments  Farms  Businesses  
Delivery Modes:  All Types  CF  DR  GD  LB  LC  MR  RR  SS  
 Auto-Complete Split Walks

**Geographic Area Quick Select**  
Province:   
Delivery Areas or Postal Codes starting with:

**Geographic Area Selection**

	Houses	Apartments	Farms	Businesses
<input checked="" type="checkbox"/> MARKHAM	74389	10735	2	9074
<input checked="" type="checkbox"/> L3P	10831	1100	0	974
<input checked="" type="checkbox"/> L3R	16212	3970	1	6641
<input checked="" type="checkbox"/> L3S	12614	629	0	426
<input checked="" type="checkbox"/> L6B	8968	12	0	254
<input checked="" type="checkbox"/> L6C	15022	525	1	274
<input checked="" type="checkbox"/> L6E	10494	823	0	255
<input checked="" type="checkbox"/> L6G	248	3676	0	250
<input type="checkbox"/> MEAFORD	2857	390	90	147
<input type="checkbox"/> MIDLAND	6665	1262	29	700

Delivery counts are as of: Expected delivery start date  
Points of Call selected: 94 200



# I have different versions of my items

- You can have different versions of your items on the same Statement of Mailing. In order to identify the different versions of your items, they must be entered separately and given a different Title. You may add to your mailing plan at this point by clicking on “**Add**” and follow the steps identified in slides 5 to 8

Mailings - Neighbourhood Mail - New

1. Describe Mailing | 2. Review Mailing Plan | 3. Calculate/Print Labels

**Billing Information** (0007023210 - IIQA CUST DO NOT USE - 005)

Contract - Owner/Alias Name: 0040662505 - IIQA CUST DO NOT USE - 005  
Paid By: 0007023210 - IIQA CUST DO NOT USE - 005  
Method of Payment: Account

Receiving Location: 0015 - OTTAWA RVU

**Mailing Characteristics**

Customer Reference: Mailing 1  
Size of Pieces: Standard (up to 30.50 x 15.24 cm - 12.0 x 6.0 inches)  
 Pieces are thicker than 1.9 cm (0.75 inch)

**Mailing Pieces**

**Add** | Update | Cancel | Delete | Bulk Update | [Generate Mailing Plan](#)

Title of Mail...	Version Spe...	Weight	Deposit Loc...	Deposit/Sta...	Pieces	Cost Centre	Reference #1
Abc2	Yes	10	1086 - LEO B...	2019/01/09	67 772		
Def1	Yes	10	1086 - LEO B...	2018/12/26	6 981		

# Describe Mailing Tab – Bulk Update

- Details of the mailing will now appear at the bottom of this screen
- If you've entered multiple mailing plans, and you wish to make a bulk change, such as updating the deposit date, you can do this by clicking on the “**Bulk Update**” button

Mailings - Neighbourhood Mail - New

1. Describe Mailing | 2. Review Mailing Plan | 3. Calculate/Print Labels

**Billing Information** (0007023210 - IIQA CUST DO NOT USE - 005)

Contract - Owner/Alias Name: 0040662505 - IIQA CUST DO NOT USE - 005 Paid By: 0007023210 - IIQA CUST DO NOT USE - 005 Method of Payment: Account

Receiving Location: 0015 - OTTAWA RVU

**Mailing Characteristics**

Customer Reference: Mailing 1 Size of Pieces: Standard (up to 30.50 x 15.24 cm - 12.0 x 6.0 inches) Promo Code:

Pieces are thicker than 1.9 cm (0.75 inch)

**Mailing Pieces**

Add Update Cancel Delete **Bulk Update** Generate Mailing Plan

	Title of Mail...	Version Spe...	Weight	Deposit Loc...	Deposit/Sta...	Pieces	Cost Centre	Reference #1
	Abc2	Yes	10	1086 - LEO B...	2019/01/09	67 772		
	Def1	Yes	10	1086 - LEO B...	2018/12/26	6 981		

# Describe Mailing Tab – Bulk Update Continued

- Select the information you wish to bulk change (for example the Deposit Date)
- Holding the CTRL key and clicking on the line will allow you to select specific Delivery Installations or holding Shift and clicking on the last line of a sequence will select all.
- Once you've entered the changes, click ***Apply***

**Bulk Update Mailing Pieces**

**Data to update**

Deposit Location [dropdown] [edit icon]

Deposit Date: 2019/01/30 [dropdown] This is the date of the first or only deposit [dropdown]

Cost Centre [dropdown] [edit icon]  Clear Cost Centre

Weight Per Piece (g) [input]

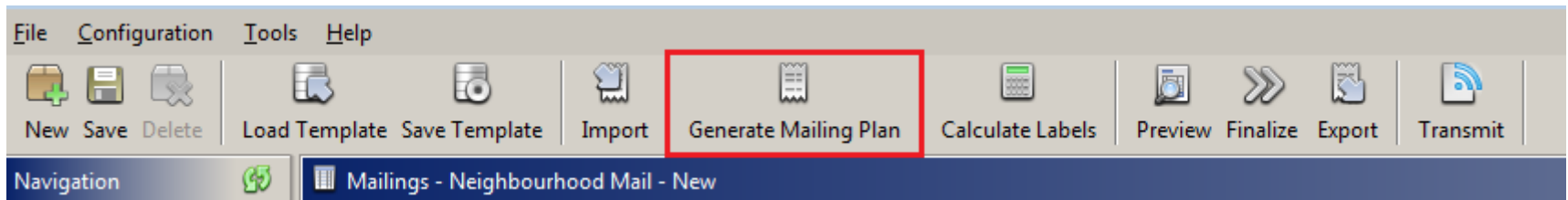
**Mailing pieces to update (press Ctrl to select multiple)**

	Title of Mail...	Version Spe...	Weight	Deposit Loc...	Deposit/Sta...	Pieces	Cost Centre	Refer
[checkbox]	abc2	Yes	22	1086 - LEO B...	2019/01/15	138 298		
[checkbox]	def1	Yes	11	1086 - LEO B...	2019/01/15	74 387		

[Apply] [Cancel]

# Describe Mailing Tab – Generating the Mailing Plan

- One you have completed entering the mailing details in the “1-**Describe Mailing**” tab, you are now ready to Generate the Mailing Plan. You will find the button at the top of the screen



# What if I need to make changes to my Mailing Pieces Information?

If any changes need to be made to the “**Mailing Pieces**” information, you may do so even if you’ve already generated the Mailing Plan. You must highlight the appropriate line (blue) and click “**Update**”. This will open up the Mailing Piece Description pop-up window where you will be able to make changes and, once completed, click “**Apply (Done)**”

Example: The title of the mailing has been updated

The screenshot shows the 'Mailing Pieces' table with the following data:

Title of Mail...	Version Spe...	Weight
Abc2	Yes	
Def1	Yes	

The 'Mailing Piece Description' pop-up window contains the following information:

- Piece Description:** Title of Mail Piece: I have changed this field; Weight per Piece (g): 11
- Deposit Details:** Location: 1086 - LEO BLANCHETTE RVU; Date: 2019/01/18
- References:** Cost Centre: ; Reference #1:
- Delivery Coverage Filters:** Target Areas: All Types, Houses, Apartments, Farms, Businesses; Delivery Modes: All Types, CF, DR, GD, LB, LC, MR, RR, SS
- Geographic Area Selection:** ON (3650737 Houses, 1319062 Apartments, 50034 Farms, 324171 Businesses)

# Review Mailing Plan Tab

- This tab is used to allow you to review the Delivery Installations. If there are errors and/or you wish to make any single or bulk changes, you may do so at this point. If no changes are needed, you can continue to tab 3 by clicking **3. Calculate/Print Labels**.

Mailings - Neighbourhood Mail - Accepted - 2019/01/18

1. Describe Mailing **2. Review Mailing Plan** 3. Calculate/Print Labels

Select Delivery Installations to view and/or update

Search In Province for [ ]

Filter Delivery Installation Search by Status:  All  Errors  Valid

Once Satisfied with the Mailing Plan, Click Tab 3 - Calculate/Print Labels

Edit selected Delivery Installation(s)

Bulk Update Fields

Location [ ]

Date [ ]

Deposit Before 11 AM [ ]

Reference #1 [ ]  Clear Reference #1 value(s)

Reference #2 [ ]  Clear Reference #2 value(s)

	Pieces	Province	Delivery Area	DI Postal Co...	Delivery Inst...	Title of Mail...	Deposit Date	Deposit Bef...	Delivery Sta...	Deposit Loc...	TR Required	Reference #1	Reference #2	Weight	Cost Centre	Target Area
✓	50 297	Ontario	MARKHAM	L3R 2K0	UNIONVILL...	I have chan...	2019/01/18	No	Upon Receipt	I086 - LEO B...	Yes			11		H A F B
✓	43 903	Ontario	MARKHAM	L3R 3K0	UNIONVILL...	I have chan...	2019/01/18	No	Upon Receipt	I086 - LEO B...	Yes			11		H A F B
✓	8 775	Quebec	GATINEAU	J8L 2G0	GATINEAU ...	Def1	2019/01/18	No	Upon Receipt	I086 - LEO B...	Yes			12		H A F B
✓	5 436	Quebec	GATINEAU	J8M 1A0	GATINEAU ...	Def1	2019/01/18	No	Upon Receipt	I086 - LEO B...	Yes			12		H A F B
✓	58 068	Quebec	GATINEAU	J8P 5B0	GATINEAU ...	Def1	2019/01/18	No	Upon Receipt	I086 - LEO B...	Yes			12		H A F B
✓	38 683	Quebec	GATINEAU	J8Y 6N0	GATINEAU ...	Def1	2019/01/18	No	Upon Receipt	I086 - LEO B...	Yes			12		H A F B
✓	27 336	Quebec	GATINEAU	J9H 3L0	GATINEAU ...	Def1	2019/01/18	No	Upon Receipt	I086 - LEO B...	Yes			12		H A F B

# Review Mailing Plan Tab - Continued

- If there are errors, a red X and a blue “i” will appear in the row. If you click on the “i” a pop-up will appear with options on how to handle the error(s)

The screenshot shows the 'Review Mailing Plan' tab in the software. The 'Errors' filter is selected. An 'Info' pop-up window is open over a table row with an error. The pop-up provides three options to resolve the error:

- Option 1**: Change all errored records to Upon Receipt. Enter a value in the date field and choose "date of first or only deposit". Press Update All.
- Option 2**: Delete the errors and correct them at a later date. Press Export Errors. Choose a file Name. Select OK. Press Delete Errors.
- Option 3**: Manually correct errored records. Select row(s) you wish to correct (press CTRL to select Multiple). Enter a value in the date field and choose "date of first or only deposit". Press Update.

Weight	Cost Centre	Target Area
22		H A B
22		H A F B
22		H A B

# Review Mailing Plan Tab – Continued

- Any combination of the Delivery Installations below can be highlighted and bulk updated
- Holding the CTRL key and clicking on the line will allow you to select specific Delivery Installations or holding Shift and clicking on the last line of a sequence will select all. Once you've entered the changes, click on "**Update**"

Mailings - Neighbourhood Mail - Accepted - 2019/01/18

1. Describe Mailing 2. Review Mailing Plan 3. Calculate/Print Labels

Select Delivery Installations to view and/or update

Search In Province for

Filter Delivery Installation Search by Status:  All  Errors  Valid Search

Once Satisfied with the Mailing Plan, Click Tab 3 - Calculate/Print Labels

Edit selected Delivery Installation(s)

Bulk Update Fields

Location 0015 - OTTAWA RVU

Date

Deposit Before 11 AM

Reference #1  Clear Reference #1 value(s)

Reference #2  Clear Reference #2 value(s)

Update Cancel Delete Edit Update All Export Errors Delete Errors

	Pieces	Province	Delivery Area	DI Postal Co...	Delivery Inst...	Title of Mail...	Deposit Date	Deposit Bef...	Delivery Sta...	Deposit Loc...	TR Required	Reference #1	Reference #2	Weight	Cost Centre	Target Area
✓	50 297	Ontario	MARKHAM	L3R 2K0	UNIONVILL...	I have chan...	2019/01/18	No	Upon Receipt	1086 - LEO B...	Yes			11		H A F B
✓	43 903	Ontario	MARKHAM	L3R 3K0	UNIONVILL...	I have chan...	2019/01/18	No	Upon Receipt	1086 - LEO B...	Yes			11		H A F B
✓	8 775	Quebec	GATINEAU	J8L 2G0	GATINEAU ...	Def1	2019/01/18	No	Upon Receipt	1086 - LEO B...	Yes			12		H A F B
✓	5 436	Quebec	GATINEAU	J8M 1A0	GATINEAU ...	Def1	2019/01/18	No	Upon Receipt	1086 - LEO B...	Yes			12		H A F B
✓	58 068	Quebec	GATINEAU	J8P 5B0	GATINEAU ...	Def1	2019/01/18	No	Upon Receipt	1086 - LEO B...	Yes			12		H A F B
✓	38 683	Quebec	GATINEAU	J8Y 6N0	GATINEAU ...	Def1	2019/01/18	No	Upon Receipt	1086 - LEO B...	Yes			12		H A F B
✓	27 336	Quebec	GATINEAU	J9H 3L0	GATINEAU ...	Def1	2019/01/18	No	Upon Receipt	1086 - LEO B...	Yes			12		H A F B

Hold CTRL on your keyboard to select specific Delivery Installations or Shift to select sequential lines



# Review Mailing Plan tab → I want to override the count information

Mailings - Neighbourhood Mail - Accepted - 2019/01/18

1. Describe Mailing 2. Review Mailing Plan 3. Calculate/Print Labels

Select Delivery Installations to view and/or update

Search In Province for

Filter Delivery Installation Search by Status:  All  Errors  Valid Search

Once Satisfied with the Mailing Plan, Click Tab 3 - Calculate/Print Labels

Edit selected Delivery Installation(s)

Bulk Update Fields

Location

Date

Deposit Before 11 AM

Reference #1

Reference #2

Update Cancel Delete Edit

	Pieces	Province	Delivery Area
✓	50 297	Ontario	MARKHAM
✓	43 903	Ontario	MARKHAM
✓	8 775	Quebec	GATINEAU
✓	5 436	Quebec	GATINEAU
✓	58 068	Quebec	GATINEAU
✓	38 683	Quebec	GATINEAU
✓	27 336	Quebec	GATINEAU

Number of Copies Update

DI Postal Code and Name: UNIONVILLE - LCD - 2

Note: Override number of pieces to zero if you wish to remove a Delivery Mode.

FSA/PC	DM Type	DM Id	DI Name	Houses	Apartments	Farms	Businesses	Total (HH)	Override
L3S	LB	0001	MARKHAM...	40			10	50	
L3S	SS	0201	UNIONVILL...	780			5	785	
L3S	SS	0202	UNIONVILL...	832			1	833	200
L3S	SS	0203	UNIONVILL...	863			7	870	
L3S	SS	0204	UNIONVILL...	847				847	
L3S	SS	0205	UNIONVILL...	727	100		10	837	
L3S	SS	0206	UNIONVILL...	850				850	
L3S	SS	0207	UNIONVILL...	863				863	
L3S	SS	0208	UNIONVILL...	861			22	883	
L3S	SS	0209	UNIONVILL...	799	135		1	935	
L3S	SS	0210	UNIONVILL...	795	260		13	1 068	
L3S	SS	0211	UNIONVILL...	721			11	732	
L3S	SS	0212	UNIONVILL...	619	134		253	1 006	
L3S	SS	0213	UNIONVILL...	883			15	898	

Total number of pieces for Delivery Installation: 50 297

Apply Cancel

Cost Centre	Target Area
	H A F B
	H A F B
	H A F B
	H A F B
	H A F B
	H A F B
	H A F B

Example above – SS 0202 total was overwritten with 200 (instead of 833)

# Review Mailing Plan tab → I want to override the count information – Continued

When you make changes to the number of pieces, a message is displayed advising that there will be some points of call not receiving your mail pieces. Also, a yellow warning sign appears to highlight where the numbers have been changed

Mailings - Neighbourhood Mail - Accepted - 2019/01/18 Close

1. Describe Mailing 2. Review Mailing Plan 3. Calculate/Print Labels

Select Delivery Installations to view and/or update

Search In Province for

Filter Delivery Installation Search by Status:  All  Errors  Valid

Once Satisfied with the Mailing Plan,  
Click Tab 3 - Calculate/Print Labels

Edit selected Delivery Installation(s)

Bulk Update Fields

Location

Date

Deposit Before 11 AM

Reference #1   Clear Reference #1 value(s)

Reference #2   Clear Reference #2 value(s)

	Pieces	Province	Delivery Area	DI Postal Co...	Delivery Inst...	Title of Mail...	Deposit Date	Deposit Bef...	Delivery Sta...	Deposit Loc...	TR Required	Reference #1	Reference #2	Weight	Cost Centre	Target Area
⚠	49 664	Ontario	MARKHAM	L3R 2K0	UNIONVILL...	I have chan...	2019/01/18	No	Upon Receipt	0015 - OTT...	Yes			11		H A F B
✓	43 903	Ontario	MARKHAM	L3R 3K0	UNIONVILL...	I have chan...	2019/01/18	No	Upon Receipt	1086 - LEO B...	Yes			11		H A F B
✓	8 775	Quebec	GATINEAU	J8L 2G0	GATINEAU ...	Def1	2019/01/18	No	Upon Receipt	0015 - OTT...	Yes			12		H A F B
✓	5 436	Quebec	GATINEAU	J8M 1A0	GATINEAU ...	Def1	2019/01/18	No	Upon Receipt	0015 - OTT...	Yes			12		H A F B
✓	58 068	Quebec	GATINEAU	J8P 5B0	GATINEAU ...	Def1	2019/01/18	No	Upon Receipt	1086 - LEO B...	Yes			12		H A F B
✓	38 683	Quebec	GATINEAU	J8Y 6N0	GATINEAU ...	Def1	2019/01/18	No	Upon Receipt	1086 - LEO B...	Yes			12		H A F B
✓	27 336	Quebec	GATINEAU	J9H 3L0	GATINEAU ...	Def1	2019/01/18	No	Upon Receipt	1086 - LEO B...	Yes			12		H A F B

(1439) The amount entered in the Total Counts field is less than the Householder amount. This will result in some points of call not receiving the mail piece; Canada Post will not be responsible for specifying where deliveries will not be affected.

# Calculate / Print Labels Tab

- This is the final tab that provides for the container labels to be printed
- The yellow fields are mandatory
- You may attribute the “**Containers**” information to all Mailing Pieces (highlighted in grey below), or you may provide different information by selecting the appropriate Mail Piece Title

Mailings - Neighbourhood Mail - Accepted - 2019/02/05


1. Describe Mailing | 2. Review Mailing Plan | **3. Calculate/Print Labels**

Reminder: The mailing must be Finalized before you can print labels [Enter Mail Preparation Parameters and press Calculate](#)

Deposit Organization  Use NPS Organization  Calculate Mono/Skids

Mail Preparation Parameters

Title of Mail Piece **All Mailing Pieces**

**Containers** I have changed this field   
Def1

Pieces per Bundle **All Mailing Pieces**

Bundles per Container

Container Type

M/S Type

Brick-Piled Mono/Skids

Bundles per M/S (Min/Max)

M/S Type

	Transport	Delivery Start Date	Containers	M/S
LEO BLANCHETTE RVU, 2019/02/05				
OTTAWA RVU, 2019/02/05				

# Calculate / Print Labels Tab – Continued

- The Delivery Installation and associated Containers will now appear on the bottom half of the screen. You may expand by clicking on the + sign
- Based on the pieces per bundle and the bundles per container, EST 2.0 calculates how many containers it thinks you will need based on the standard container size

Mailings - Neighbourhood Mail - Accepted - 2019/02/05

1. Describe Mailing | 2. Review Mailing Plan | **3. Calculate/Print Labels**

Reminder: The mailing must be finalized before you can print labels You are ready to Finalize

Deposit Organization  Use NPS Organization  Calculate Mono/Skids

Mail Preparation Parameters

Title of Mail Piece: Def1

Containers: Pieces per Bundle: 200, Bundles per Container: 20, Container Type: Customer Supplied Containers

Consolidation into Mono/Skids: Containers per M/S (Min/Max): , M/S Type:

Brick-Pile Bundles per Container:

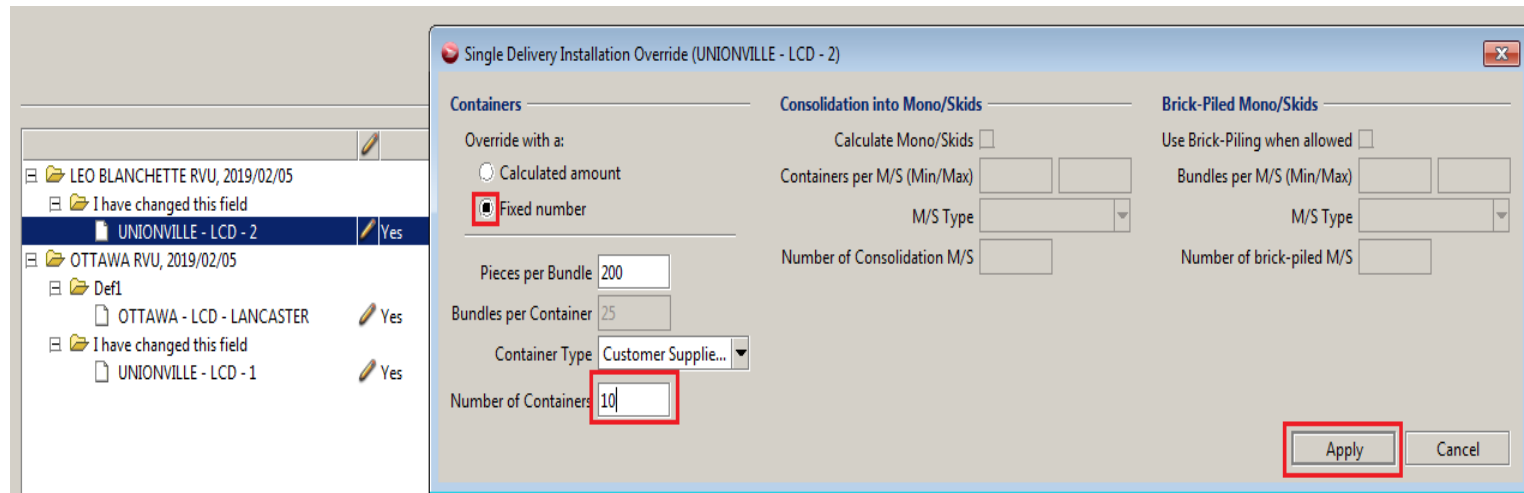
Calculate

	Transport	Delivery Start Date	Containers
LEO BLANCHETTE RVU, 2019/02/05			11
I have changed this field			
UNIONVILLE - LCD - 2	Yes	Upon Receipt	11
OTTAWA RVU, 2019/02/05			6
Def1			
OTTAWA - LCD - LANCASTER	Yes	Upon Receipt	2
I have changed this field			
UNIONVILLE - LCD - 1	Yes	Upon Receipt	4

# Calculate / Print Labels Tab → Overriding Container Quantities

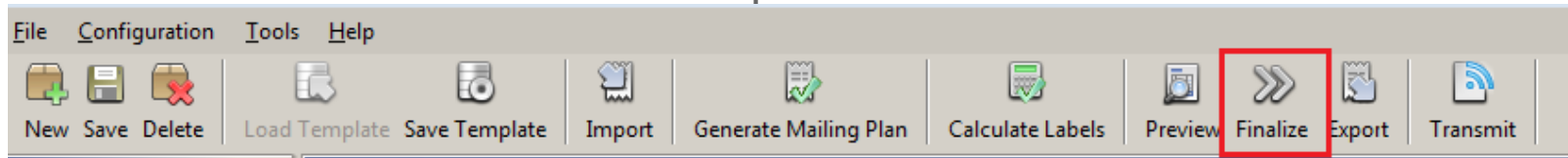
- If you are able to fit the items in less or need additional containers, the counts can be edited (if you have **Finalized**, you have to **Undo Finalize** before making changes)
- If you wish to override a Container count, double-click on the specific line and a pop-up window will appear
- You can change the total number of containers by clicking the “**Fixed number**” radio button and entering the total number of containers

Click “**Apply**”

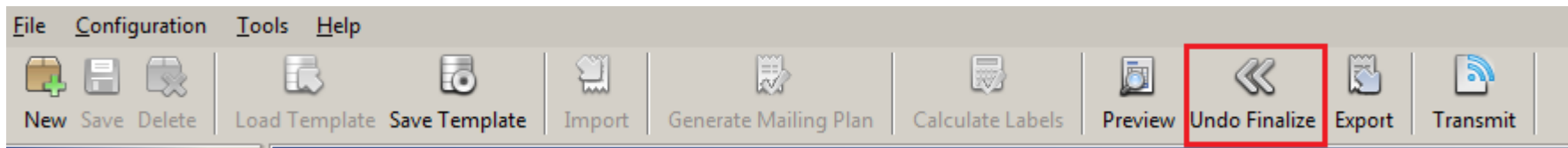


# Calculate / Print Labels Tab → How to print container labels

- In order to print your labels, the mailing must be Finalized
- Click the “**Finalize**” button at the top of the screen

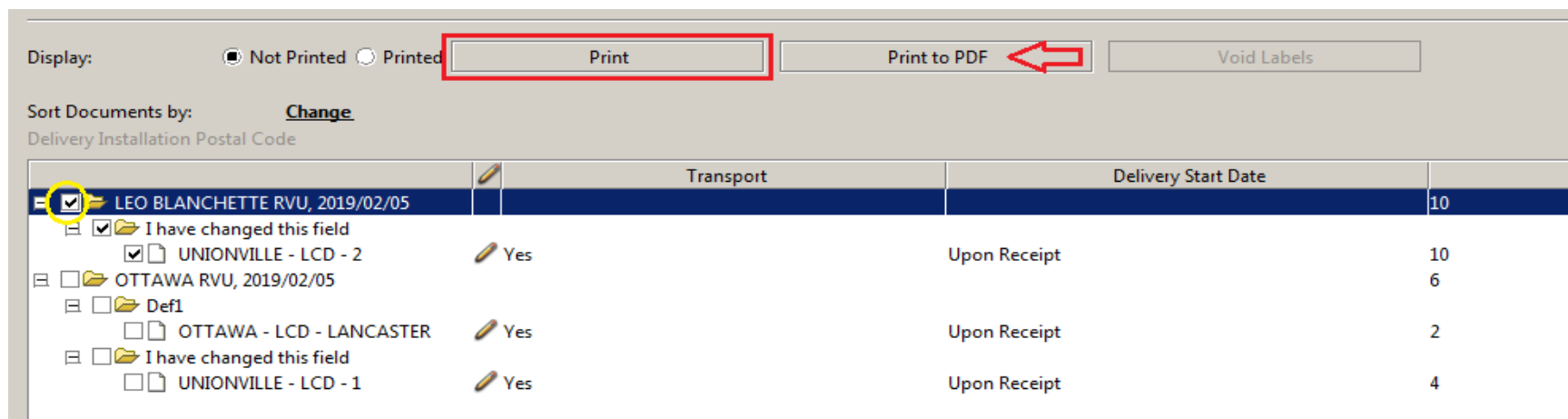


- Once Finalized, the top screen will be greyed out allowing for no more changes
- \* *You may leave the Neighbourhood Mailing in finalized mode until the mailing is packaged/labelled and ready to go. Once you are ready you will need to transmit (see slide 23). Note: Depending on how long you hold off on transmitting the order, you may have to re-do your Mailing Plan as routes may have been restructured during that time.*
- Alternatively, if you wish to make changes, click “**Undo Finalize**” to allow you to make changes



# Calculate / Print Labels Tab → How to print container labels – Continued

- Now that the mailing is Finalized, EST 2.0 allows you to select the Delivery Installations for which you wish to print labels
- If you wish to print all labels, check off all boxes in the first row of each Delivery Installation (yellow circle below)
- Alternatively if the mailing is large, you can select certain Delivery Installations and print them one by one (**the print icon will be greyed out until something is checked**)
- You also have the option to select “**Print to PDF**” to save the document



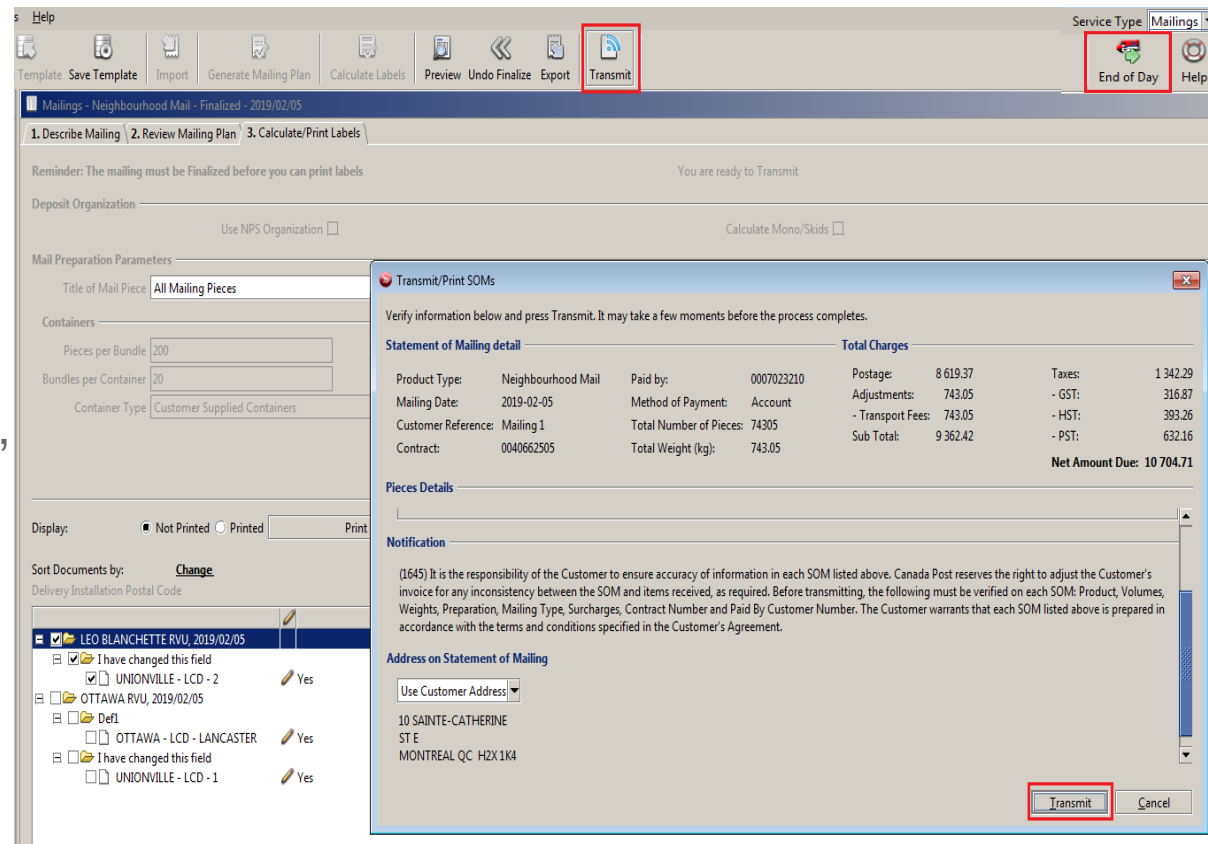
Display:  Not Printed  Printed

Sort Documents by: [Change](#)  
Delivery Installation Postal Code

	Transport	Delivery Start Date	
<input checked="" type="checkbox"/> LEO BLANCHETTE RVU, 2019/02/05			10
<input checked="" type="checkbox"/> I have changed this field			
<input checked="" type="checkbox"/> UNIONVILLE - LCD - 2	Yes	Upon Receipt	10
<input type="checkbox"/> OTTAWA RVU, 2019/02/05			6
<input type="checkbox"/> Def1			
<input type="checkbox"/> OTTAWA - LCD - LANCASTER	Yes	Upon Receipt	2
<input type="checkbox"/> I have changed this field			
<input type="checkbox"/> UNIONVILLE - LCD - 1	Yes	Upon Receipt	4

# How do I print/transmit my Statement of Mailing (SOM)?

- Once everything is inputted, to transfer this Order (SOM) to Canada Post, click the **“Transmit”** button at the top half of the screen. A summary of the order will appear. Click **“Transmit”**
- Once clicked, the order will be automatically charged to the account (if this is the option chosen) and a Statement of Mailing (SOM) will print, which must accompany the mailing when deposited at a Canada Post facility
- At the end of the day, click **“End of Day”**





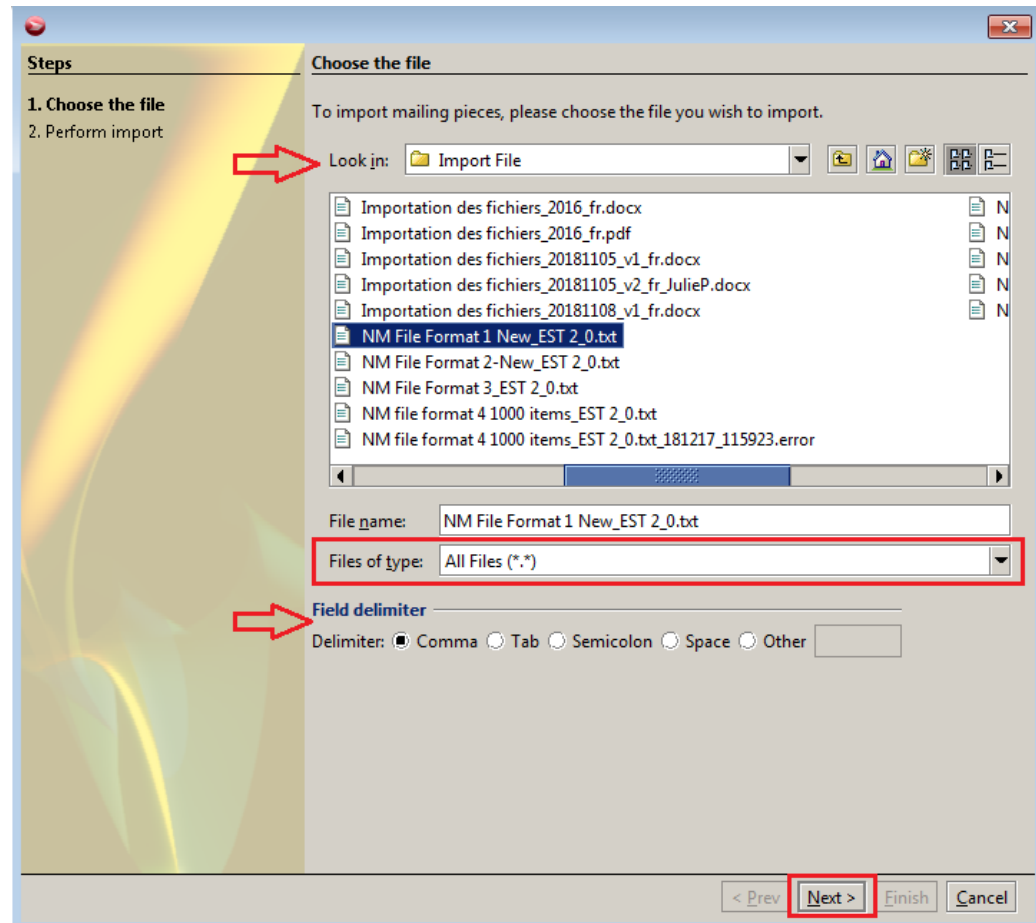
# How do I import a Mailing Plan?

- Often mailers will receive targeting mailing plans that will consist of a small EST txt file that can be uploaded
- Once you've opened a new Neighbourhood Mail Order, complete all mandatory fields (yellow), click "**Import**" at the top of the screen
- For more information regarding Import File Specifications, go to:  
[https://www.canadapost.ca/cpo/mc/assets/pdf/business/import\\_file\\_specifications\\_en.pdf](https://www.canadapost.ca/cpo/mc/assets/pdf/business/import_file_specifications_en.pdf)

The screenshot shows the 'Mailings - Neighbourhood Mail - New' window. The top toolbar contains several icons, with the 'Import' icon (a document with a red 'X') highlighted by a red box. Below the toolbar, the 'Billing Information' section includes fields for 'Contract - Owner/Alias Name' (0040662505 - IIQA CUST DO NOT USE - 005), 'Paid By' (0007023210 - IIQA CUST DO NOT USE - 005), and 'Receiving Location' (1086 - LEO BLANCHETTE RVU). The 'Mailing Characteristics' section has a 'Customer Reference' field and a 'Size of Pieces' dropdown menu, which is highlighted in yellow. Below this, there is a checkbox for 'Pieces are thicker than 1.9 cm (0.75 inch)'. The 'Mailing Pieces' section at the bottom has buttons for 'Add', 'Update', 'Cancel', 'Delete', and 'Bulk Update', and a table with columns: 'Title of Mail...', 'Version Spe...', 'Weight', 'Deposit Loc...', 'Deposit/Sta...', 'Pieces', 'Cost Centre', and 'Reference #1'. A blue message at the bottom right of the form states: 'You must describe your Mailing Piece by using either Add or Import'.

# How do I import a Mailing Plan? – Continued

- A pop-up will appear
- Select the file you wish to import
- You may have to select “**All Files (\*.\*)**” types in order to locate it
- Choose the “**Field Delimiter**” of your file
- Click the “**Next**” button
- **Note:** If the file you are importing is Type 4, skip to the next slide



# How do I import a Mailing Plan? – Continued

- You will now be asked to “**Describe Mailing Piece**”
- All yellow fields are mandatory
- The “**References**” section is optional
- In the “**Delivery Coverage Filters**” choose which option you wish the system to do should it encounter entries with no counts from your import file
- Click “**Next**”

**Describe Mailing Piece**

**Steps**

1. Choose the file
2. Describe Mailing Piece
3. Perform import

**Piece Description**

Title of Mail Piece

Weight per Piece (g)   Parliament Mail

**Deposit Details**

Location

Date

Deposit(s) will be done before 11 AM

**References**

Cost Centre

Reference #1

**Delivery Coverage Filters**

Please indicate how to handle entries with no counts.

Ignore records

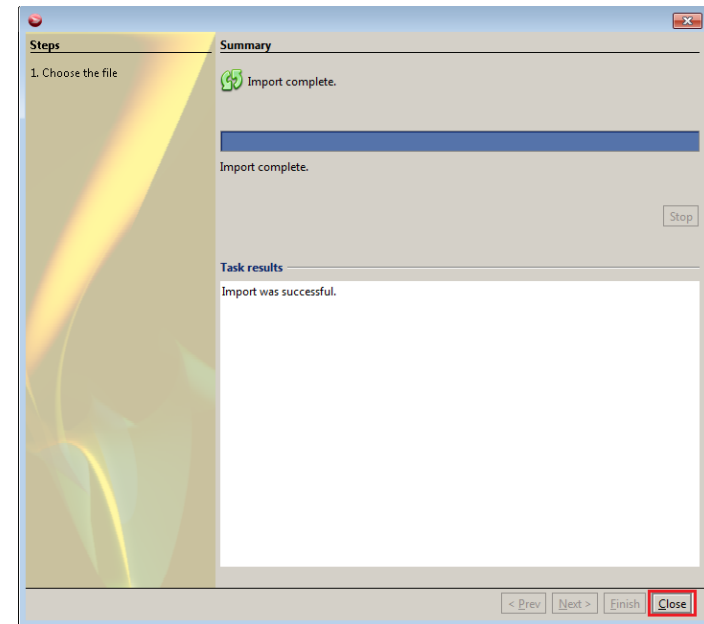
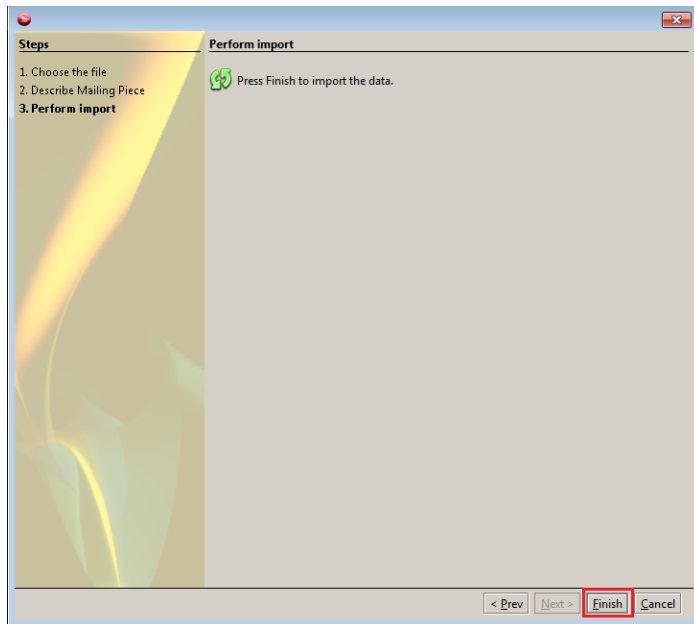
Use Householder counts

Houses  Apartments  Farms  Businesses

< Prev **Next >** Finish Cancel

# How do I import a Mailing Plan? – Continued

- Click the “**Finish**” button
- Once the plan is imported, you should receive a successful screen
- Click “**Close**”
- Go to slide 12 for next steps

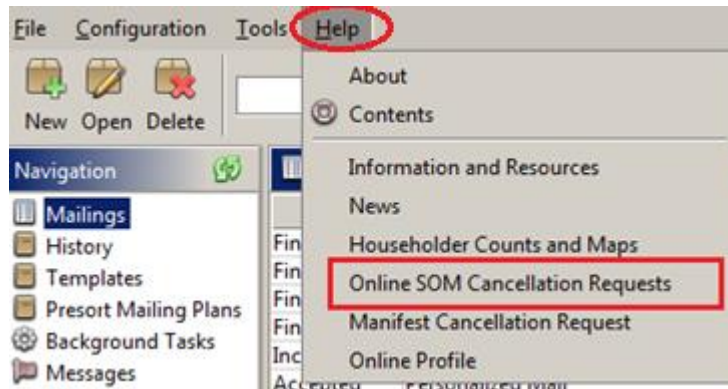


# How do I import a Mailing Plan? → How to add or remove routes

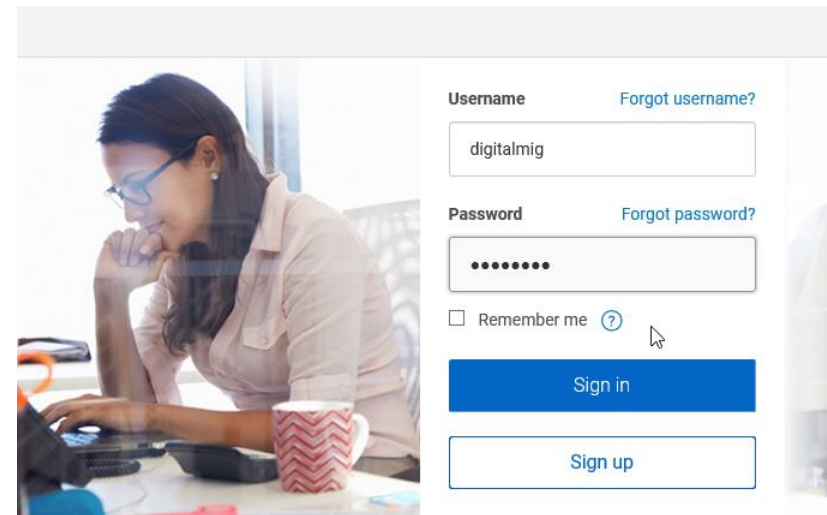
- To add additional routes, a separate Mailing Plan line must be created and added underneath the existing entry
  - To do this, go back to slide 4
  
- Routes can be removed or edited by overriding the counts in the “**Review Mailing Plan**” tab
  - To do this, go back to slides 10 and 11
  
- You are now ready to click the “**Generate Mailing Plan**”
  - To do this, go back to slide 12

# I transmitted my Statement of Mailing (SOM) by accident, can I delete it?

- If you transmit a SOM by accident, it can be deleted
- To do this, you must click on “**Help**” at the top of the screen
- Then click “**Online SOM Cancellation Requests**”



- A pop-up window will appear and ask you to log in into your CPC Account Profile

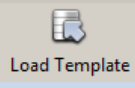
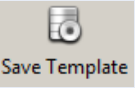


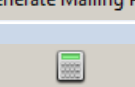
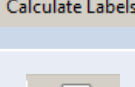
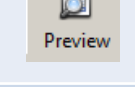
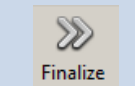



# I transmitted my Statement of Mailing (SOM) by accident, can I delete it? – Continued

- Once you log in, you will be in the “Create a service ticket” flow; type: Cancel an Order (Statement of Mailing)
- Follow the steps and complete the appropriate information that can be found on the 3<sup>rd</sup> page of the SOM that was printed from the initial transmission

The screenshot shows a three-step process for creating a service ticket. Step 1, 'Ticket details', is highlighted in blue and contains a red circle around the text 'Create a service ticket'. Step 2, 'Contact details', and Step 3, 'More information', are shown in grey. Below the progress bar, the 'Ticket details' section is expanded, showing a red circle around the text 'Type: Cancel an Order (Statement of Mailing)'. The form includes a 'Statement of Mailing Information' section with a 'Select customer:' dropdown menu showing '0007114407 - Temporarily Unavailable' and a 'Statement of Mailing Number' input field.

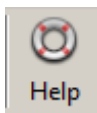
# Top screen icon definitions

Icons	Quick description
 Load Template	Recall characteristics of a mailing that you've previously saved
 Save Template	Save characteristics of a mailing for repeated future use
 Import	Import a mailing plan or coverage for a Neighbourhood Mail campaign
 Generate Mailing Plan	Calculates the route counts for each delivery installation
 Calculate Labels	Calculates the number of labels for each delivery installation
 Preview	Shows the detailed cost of the mailing and allows you to create a Preview SOM to save for your records
 Finalize	Validates and locks the mailing before transmitting. No further changes can be done unless you "Undo Finalize" for the mailing
 Export	Creates a .txt file of your routes and counts
 Transmit	Electronically sends Canada Post the mailing information and generates your SOM to accompany your mailing drop off



# General information

## Help tool and links:



<https://www.canadapost.ca/cpo/mc/business/estdesktop20/help/index.jsf?LOCALE=en>

You can receive helpful tips by placing your cursor in the field you need help with, then clicking on the **Help** button in the top right-hand corner or pressing the F1 key

EST Help	1 877 376-1212
Supplies and service	1 866 757-5480
Label stock (rolls – 500)	# 33-086-829 <i>(for thermal printers)</i>
Label stock (Z-fold – 4,000/box)	# 33-086-672 <i>(for thermal printers)</i>