

Collaborator guide

What is Connect?

Connect is the digital delivery platform that facilitates sending and receiving confidential messages and documents with one or multiple recipients. It enables seamless, secure collaboration with one or many customers, clients, colleagues, partners and suppliers through one common platform.

What can a Connect collaborator do?

As a collaborator to the Connect service of your organization, you can create conversations and invite other users, known as participants, to collaborate in those conversations.

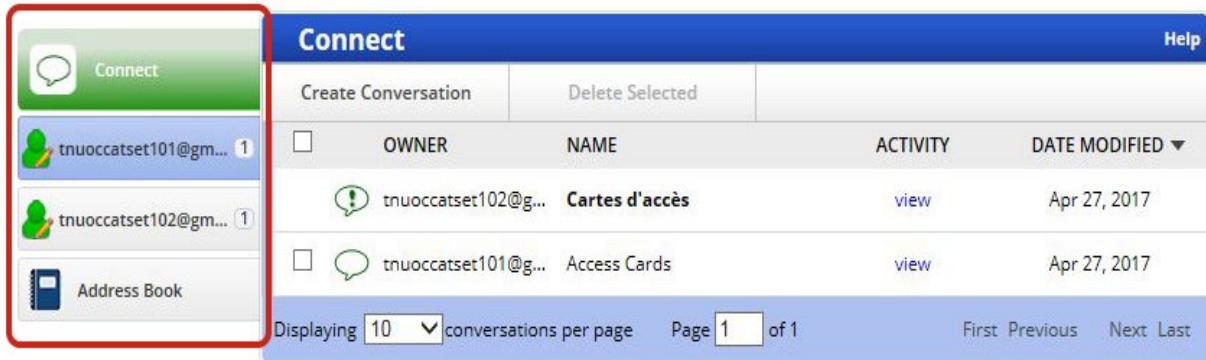
A conversation is an exchange of information and documents between collaborators and participants. Conversations are closed environments: only the collaborator (who created the conversation) and participants of the given conversation can view the messages.

As a collaborator, you can create as many conversations and invite as many participants as you want.


Participants receive email notifications prompting them to access messages within the conversation, and they can post replies. However, they cannot create conversations.

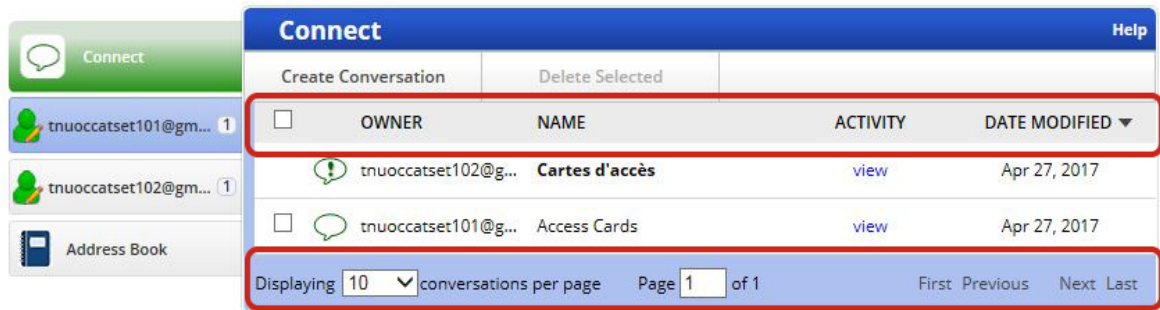
How do I navigate in Connect?

1. Sign in to your Canada Post online account to access your Connect inbox.
2. You will notice one or several tabs under the Connect tab. Each one identifies a **Connect persona** (meaning one of your collaborator account email addresses) associated with your Canada Post profile. Click a tab to access a specific conversation listing.



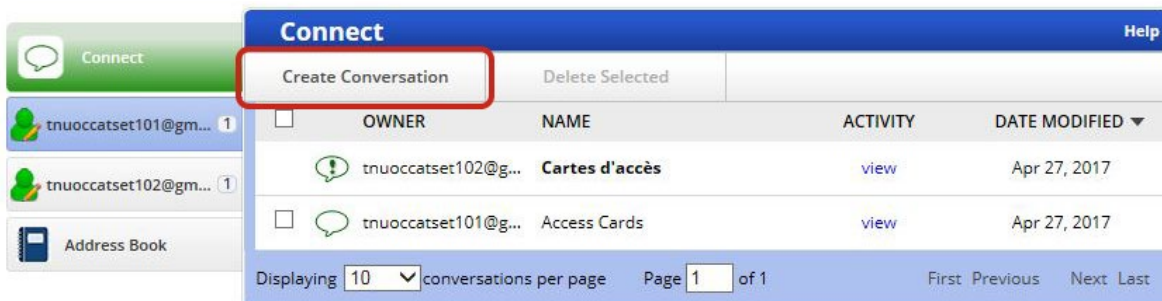
What is a conversation listing?

- A **conversation listing** shows all the conversations you've created and those in which you participate. It includes the following key information:
- OWNER – the persona or contact under which the conversation has been created.
- NAME – the title (or subject) of the conversation.
- ACTIVITY – an audit trail showing all the activity that took place in the conversation, for instance who created the conversation and when; which participants opened or posted a message; etc. Click **view** to access the audit trail. The audit trail can be sorted by **name**, **activity** or **date** by clicking those words at the top of the Conversation Activity window.
- DATE MODIFIED – The date of the latest activity in the conversation. By default, conversations with the most recent activities are listed first. To reverse this order and access further past conversations, simply click the arrow ▼.
- An EXCLAMATION POINT IN A CALL-OUT BUBBLE  indicates that there is an unread message in the corresponding conversation. To access to the message, click the conversation name.
- A PAGINATION BAR at the bottom of the Connect inbox allows you to select the number of conversations to be listed – 10, 20 or 30 – per page. To reach the first listing page or the last one, a preceding or following page, click the links **First**, **Previous**, **Next** or **Last**, on the right-hand side of the pagination bar.
- Conversations that were created by collaborators who don't have an active Connect account anymore (meaning that their collaborator account has been deactivated or deleted by the administrator of the Connect service in your organization) are listed in red characters, and can only be read. New messages cannot be posted in those conversations.

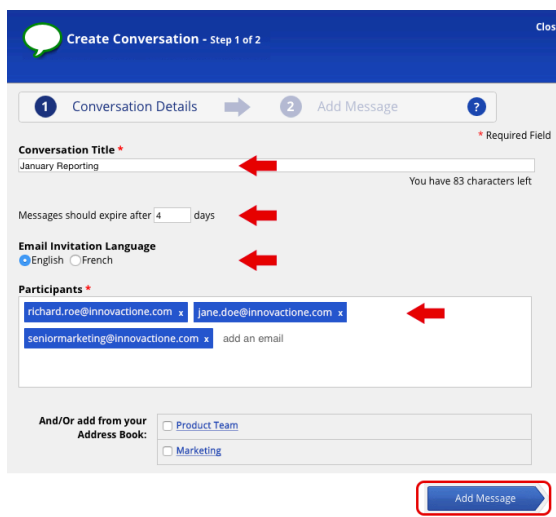


How do I create a conversation?

1. Sign in to your Canada Post online account
2. If you own several collaborator accounts, click the **Connect persona tab** you want to use to create the conversation. Skip this step if you use only one collaborator account.
3. On your Connect inbox, select the **Create Conversation** link.



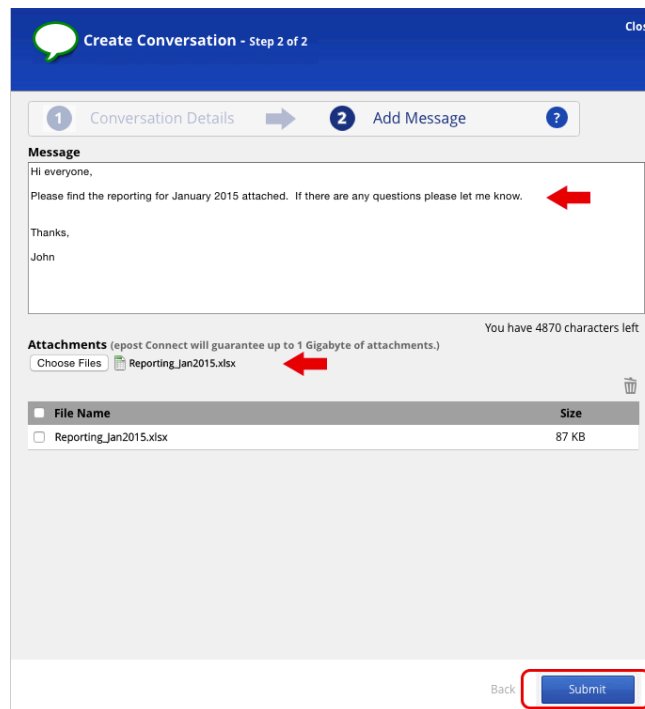
4. In the Create Conversation – Step 1 of 2 dialog box:
 - A. Enter a title under **Conversation Title**.
 - B. Set your message expiry date. (It is possible that your organization has already set a number of days by default, but it can be overridden.)
 - C. Select the **email invitation language***.
 - D. Type the participants' email addresses in the **Participants** box. Use commas, spaces or tabs to separate email addresses.
 - E. Click the **Add Message** button.



* Keep in mind that all participants entered will receive the e-mail invitation in the selected language. If needed, you can send invitations in the other language by inviting participants after the conversation has been created. Please refer to the section How do I add participants to a conversation, on page 6.

If you've created **contact lists** in your address book, you'll be given the option of selecting one or many lists so their participants can also access the conversation. This avoids the need to type several email addresses. Please refer to the section To add recipients from an existing contact list, on page 15.

5. In the Create Conversation – Step 2 of 2 dialog box:
 - A. Type your message in the **Message** box.
 - B. To include attachments, click the **Choose files** button. Connect accepts up to 1 GB of attachments.
 - C. Click the **Submit** button.

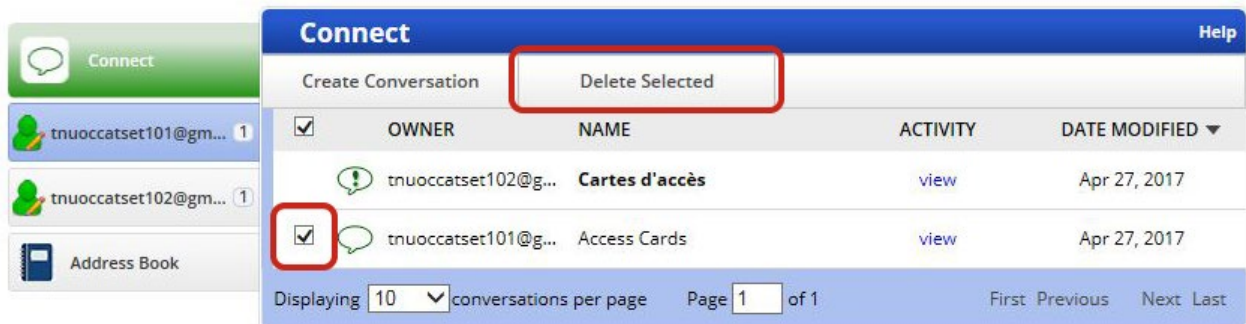


Participants will receive an email inviting them to join the conversation.

How do I delete a conversation?

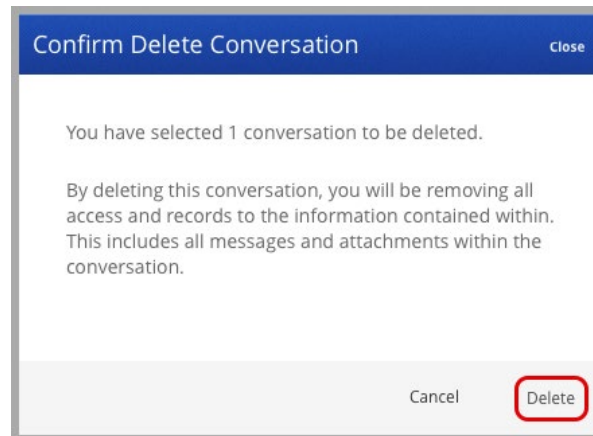
You can only delete conversations you've created. Once a conversation is deleted, you cannot restore it. Deleting a conversation removes all access, records and information in that conversation from all participants in that conversation.

1. In the conversation listing, check the box on the left of the conversation you want to delete and click on **Delete Selected**.




	OWNER	NAME	ACTIVITY	DATE MODIFIED
<input checked="" type="checkbox"/>	tnuoccatset102@g...	Cartes d'accès	view	Apr 27, 2017
<input checked="" type="checkbox"/>	tnuoccatset101@g...	Access Cards	view	Apr 27, 2017

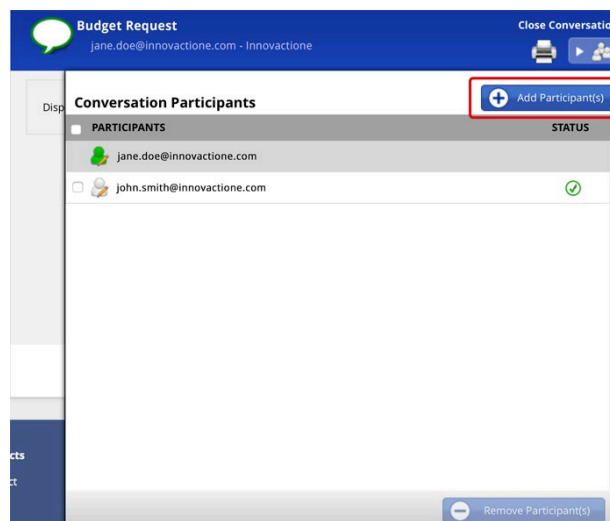
2. On the Confirm Delete Conversation dialog box, click **Delete**.



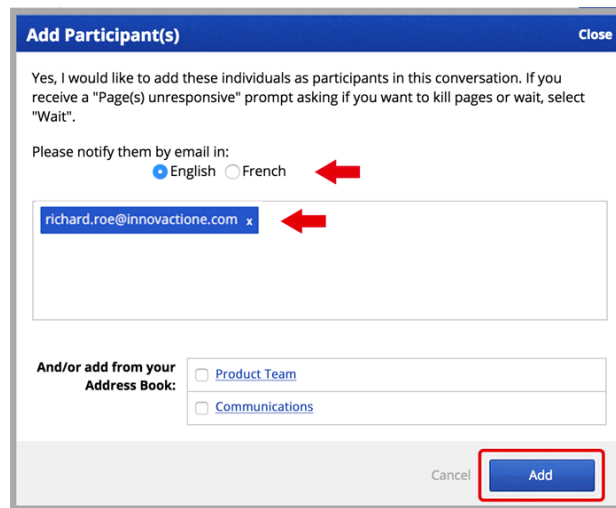
How do I add participants to a conversation?

You can only add participants to conversations you've created.

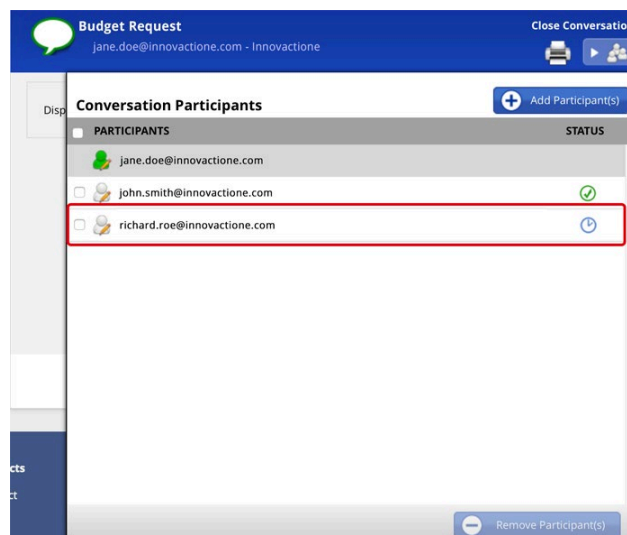
1. On your Connect inbox, select the **name of the conversation** you want to add participants to.
2. On the conversation slider pane, click the **Participants icon**  at the top right corner to access the participants' list.
3. On the Conversation Participants slider pane, click the **Add Participant(s)** button.



4. In the Add Participant(s) dialog box:
 - A. Select the **language** in which you want the participants to receive the email notification. Keep in mind that all participants will receive the invitation in the selected language. If needed, you can repeat steps 1 – 4 to send invitations in the other language.
 - B. Enter the **email addresses of the participants** you want to add to the conversation. Use commas, spaces or tabs to separate email addresses. If you've created **contact lists** in your address book, please refer to the section *To add recipients from an existing contact list*, on page 15.)
 - C. Click the **Add** button.




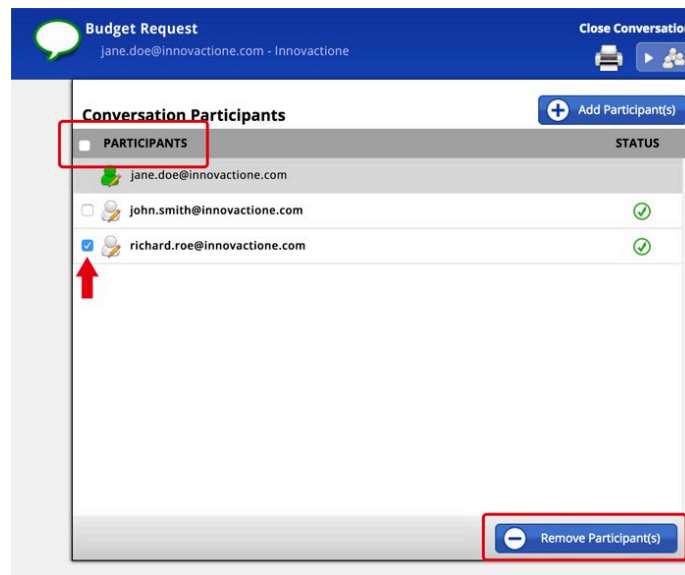
Email addresses of new participants will appear immediately below your Connect persona, at the top of the list of participants. Click the **Close Conversation** link to return to your Connect inbox.



How do I remove participants from a conversation?

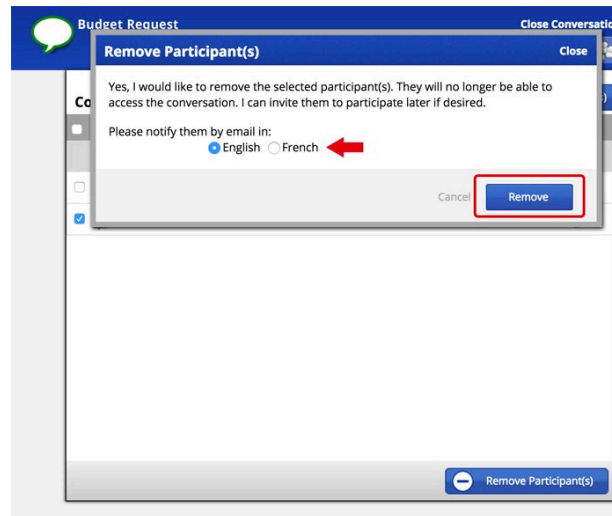
You can only remove participants from conversations you've created.

1. In the conversation list, select the **name of the conversation** that you want to remove participants from.
2. On the conversation slider pane, click the **Participants icon**  at the top right corner to access the participants' list.
3. On the Conversation Participants slider pane, check the box before each participant you want to remove from the conversation. To remove all participants, check the box **PARTICIPANTS** above the list.
4. Click the **Remove Participant(s)** button.



5. On the Remove Participant(s) dialog box:
 - A. Select the **language** in which you want the participants to receive the email notification. Keep in mind that all participants will receive the invitation in the selected language. If needed, you can repeat steps 1 – 5 to send invitations in the other language.

- B. Click the **Remove** button.

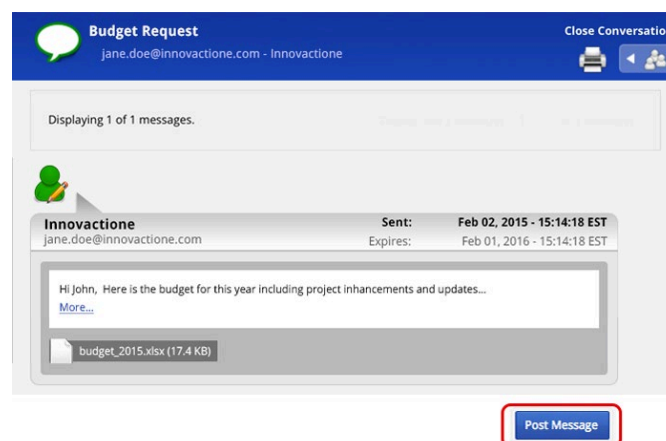


The removed participants will appear ghosted in the list and will no longer be part of the conversation. Click the **Close Conversation** link to return to your Connect inbox.

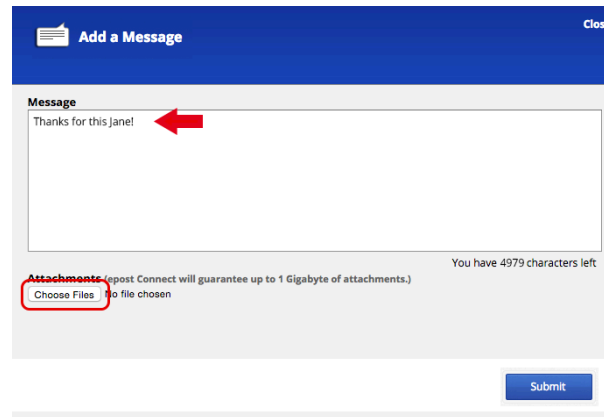
To later return the removed participant(s) to the conversation, please refer to the section *How do I add a participant to a conversation* on page 6. Enter the email addresses of the participants you want to bring back into the conversation. They will no longer appear ghosted in the participants' list.


How do I post a message?

1. On your Connect inbox, click the name of the conversation you want to post a message in.
2. On the conversation slider pane, click the **Post Message** button.

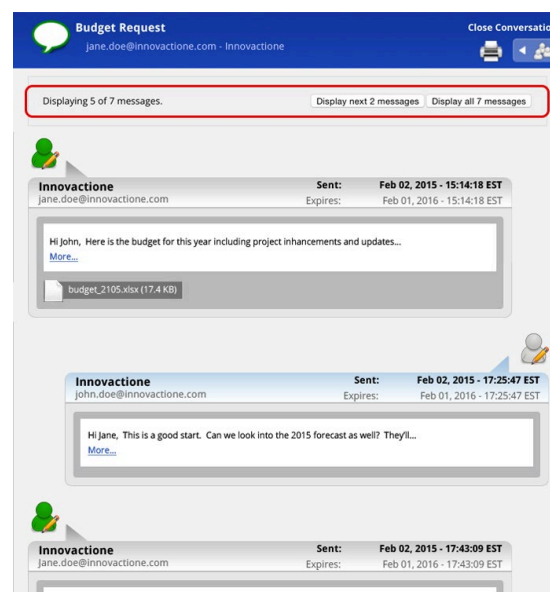


3. Type your message in the **Message** box of the Add a Message dialog box. If needed, include attachments by clicking the **Choose Files** button. Connect accepts up to 1 GB of attachments.
4. Click the **Submit** button.



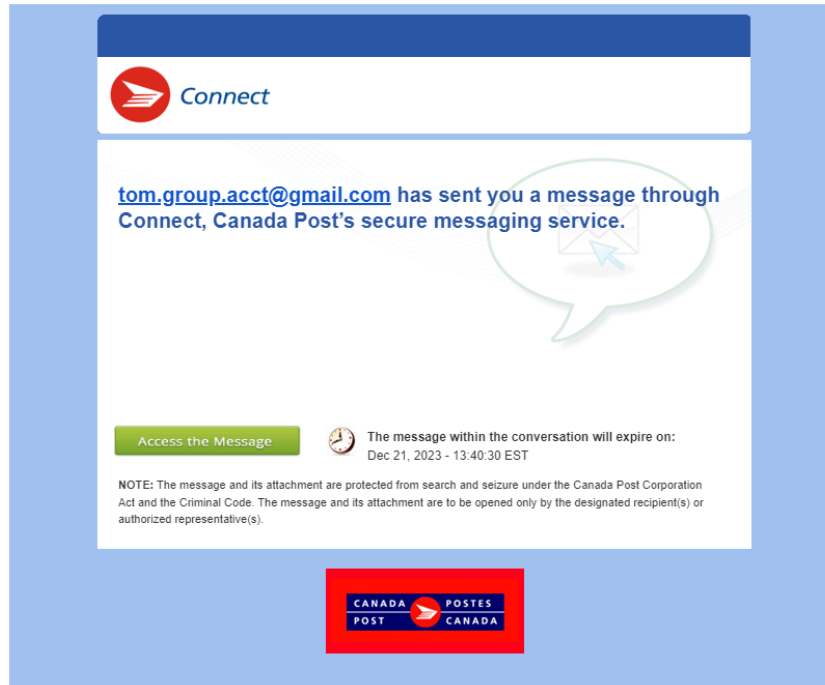
The messages you post display the figurine icon  on the right-hand side. Messages posted by other participants display the figurine icon on the left-hand side. The most recent message appears at the bottom of the conversation slider pane.


The conversation slider pane will display up to five of the latest messages in the conversation. Use the **Display** buttons at the top of the window to navigate through a conversation with more than five messages.

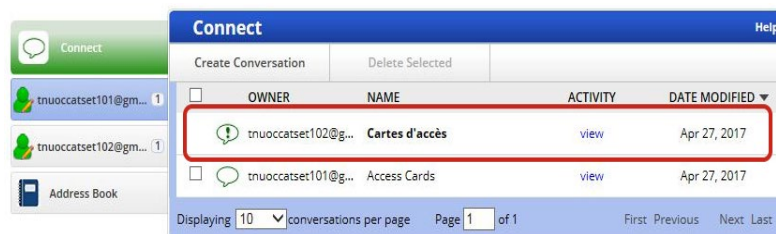


How do I access a message and reply to it?

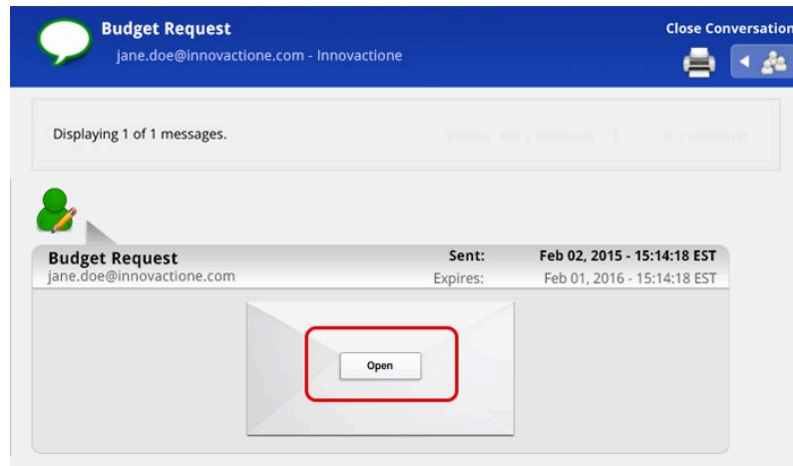
1. When a message has been posted in a conversation you participate to, you receive an email notification from connect-connexion@canadapost-postescanada.ca . Click the **Access the Message** button in the email notification.



2. Sign in to your Canada Post online account
3. If you own several collaborator accounts, click the tab of the **Connect persona** that received the email notification. Skip this step if you use only one collaborator account.
4. The message is in the conversation marked by a call-out bubble with an exclamation point  . Click the **name of the conversation**.



5. On the conversation slider pane, click the **Open** button on the envelope to display the message.

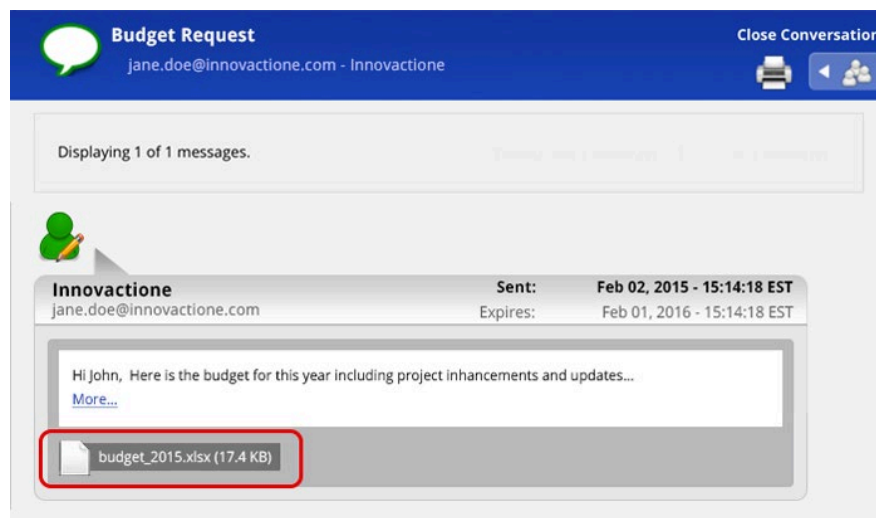


6. To reply to the message, click the **Post Message** button at the bottom of the conversation slider pane and follow steps 3 and 4 of the section *How do I post a message* on page 9.

Replying will not send your message directly to all participants, but will send an email notifying them that there is a new message available in their Connect account (see *step 1 above*).

How do I download an attachment?

To download an attachment, simply click the attachment link displayed at the bottom of the message.



Note that some browsers, such as Safari® and Chrome™, will download directly the attachment. Others, such as Firefox®, may prompt you to open or save the file.

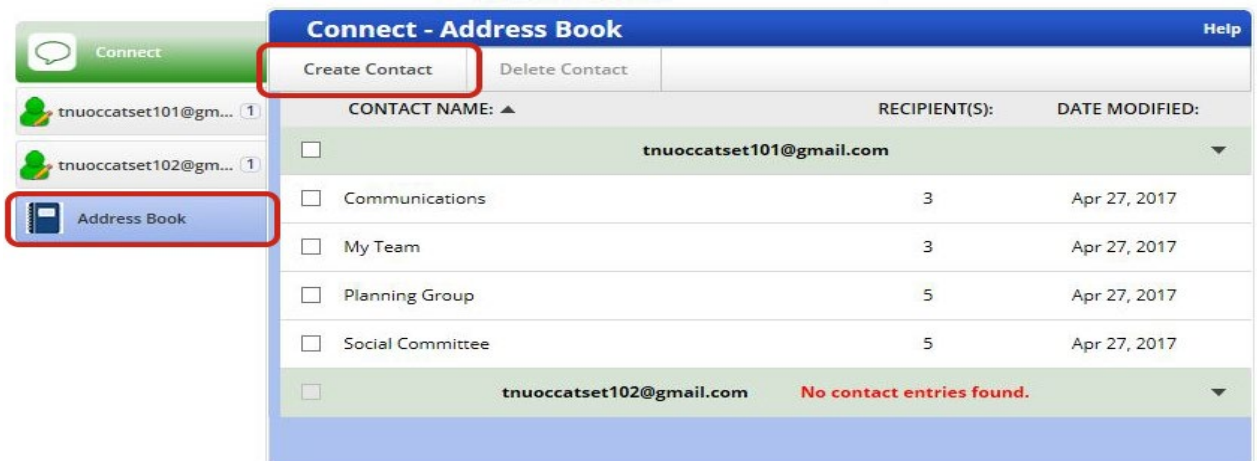
How do I create an address book?

The Connect address book is comprised of all the contact lists you created under your Connect account. It allows you to create and save up to 100 contact lists, each one including up to 500 email addresses. Your Connect – Address Book listing can be sorted by **contact name**, **recipient(s)** or **date modified** by clicking those words at the top of your Connect – Address Book inbox.

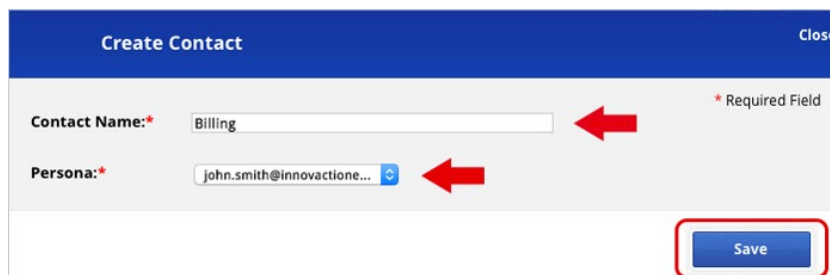
If you use more than one persona in Connect, whether for a collaborator or group account, the respective contacts of those personas will be listed in collapsible sections.

To create your Connect address book, follow these steps:

1. On your Connect inbox, click the **Address Book** tab on the left.



2. Click on **Create Contact** on the top left of your Connect – Address Book inbox.
3. In the Create Contact slider pane, enter the **contact name** that will identify the list you are creating. Select the persona under which you will manage this contact list. Click the **Save** button.

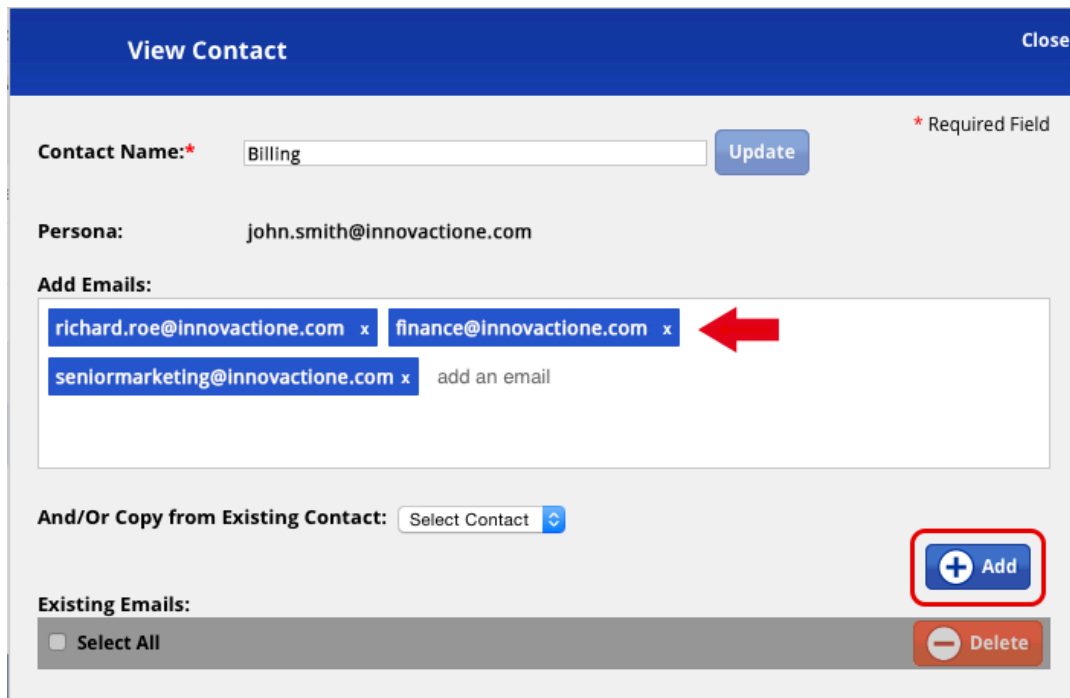


Create Contact Close

Contact Name:* * Required Field

Persona:*

4. In the View Contact dialog box, add the **email addresses** of the participants you want to include in this new contact list. Use commas, spaces or tabs to separate email addresses. Click the **Add** button.



The screenshot shows the 'View Contact' dialog box. At the top, there is a blue header with the title 'View Contact' and a 'Close' button. Below the header, the 'Contact Name' field is set to 'Billing' with an 'Update' button to its right. A red asterisk and the text '* Required Field' are positioned to the right of the 'Update' button. The 'Persona' field contains the email address 'john.smith@innovactione.com'. The 'Add Emails' section features a text input area containing three email addresses: 'richard.roe@innovactione.com', 'finance@innovactione.com', and 'senlormarketing@innovactione.com'. Each address is followed by a small 'x' icon. A red arrow points to the 'finance@innovactione.com' address. Below the input area is a placeholder text 'add an email'. The 'And/Or Copy from Existing Contact' section has a dropdown menu currently showing 'Select Contact'. At the bottom right, there is a blue '+ Add' button and a red '- Delete' button. The 'Existing Emails' section at the bottom left includes a 'Select All' checkbox.

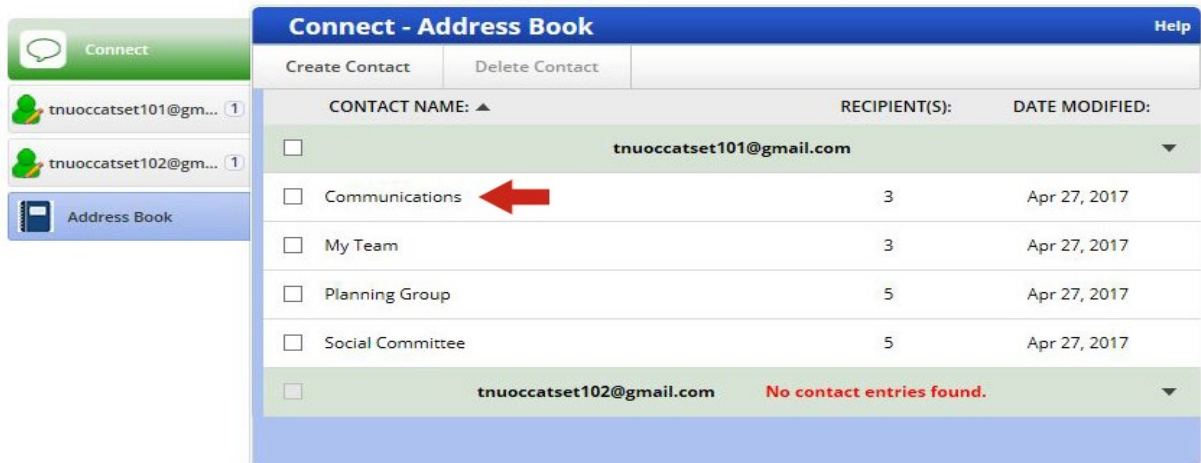
5. Newly added emails will show under **Existing Emails**. The system will display them in alphabetical order. Click on **Close**.

Your new contact list is now saved in your Connect – Address Book inbox. The number of recipients that are part of it will show under the **Recipient(s)** heading.

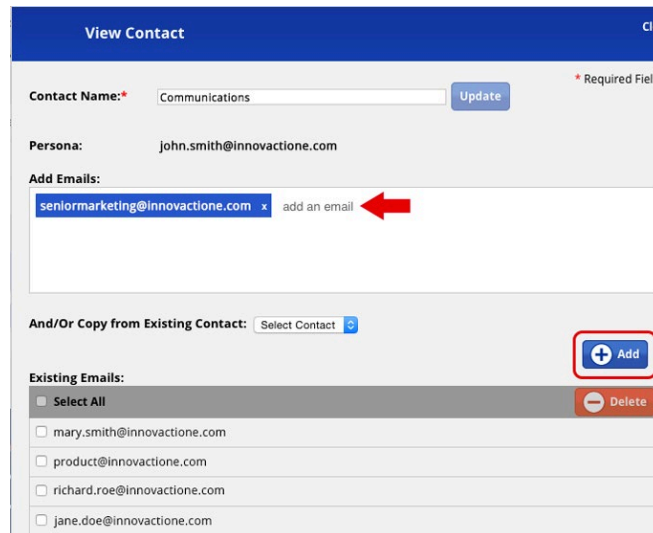
How do I add/remove recipients to/from a contact list?

To add recipients to a contact list:

1. Select the **contact list name** in your Connect – Address Book inbox (for instance *Communications*).



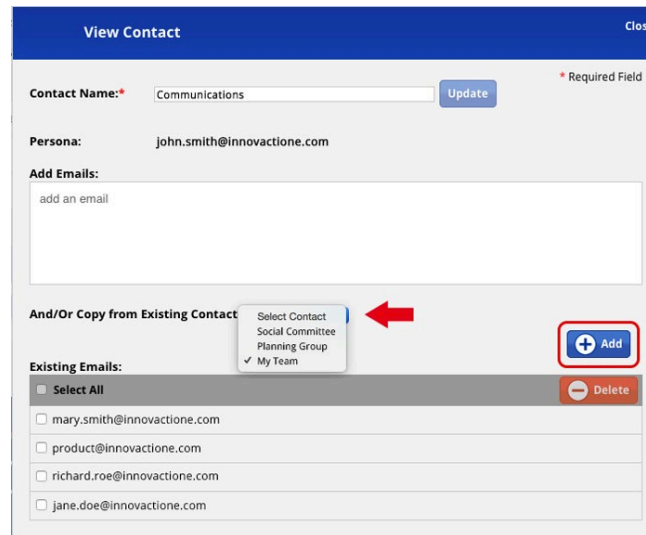
2. In the View Contact slider pane, enter the emails of the persons you want to add in the **Add Emails** box. Use commas, spaces or tabs to separate email addresses. Click the **Add** button.



3. The added recipients' email addresses will appear at the top of the contact list. Click on **Close**. The system will automatically organize the list in alphabetical order.

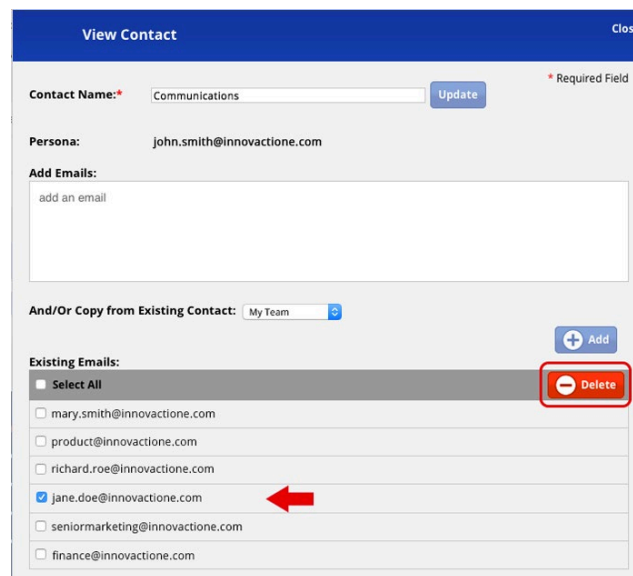
To add recipients from an existing contact list:

1. On the View Contact slider pane, select the appropriate list from the **And/Or Copy from Existing Contact** drop-down menu (for instance *My Team*) and click the **Add** button. This will copy the entire contact list into the list you are updating.



The screenshot shows the 'View Contact' interface. At the top, there's a 'Close' button. Below it, the 'Contact Name' field is set to 'Communications' with an 'Update' button and a '* Required Field' indicator. The 'Persona' field shows 'john.smith@innovactione.com'. There's an 'Add Emails' section with a text input 'add an email'. The 'And/Or Copy from Existing Contact' dropdown menu is open, showing options: 'Select Contact', 'Social Committee', 'Planning Group', and 'My Team' (which is checked). A red arrow points to this dropdown. To the right of the dropdown is a blue '+ Add' button, which is highlighted with a red box. Below the dropdown is the 'Existing Emails' section, which includes a 'Select All' checkbox and a 'Delete' button. A list of email addresses is shown with checkboxes: 'mary.smith@innovactione.com', 'product@innovactione.com', 'richard.roe@innovactione.com', and 'jane.doe@innovactione.com'.

2. If you do not want to include all the recipients of the contact list, simply mark the boxes on the left of the email addresses you want to omit from the updated list (for instance jane@innovactione.com) and click the **Delete** button.

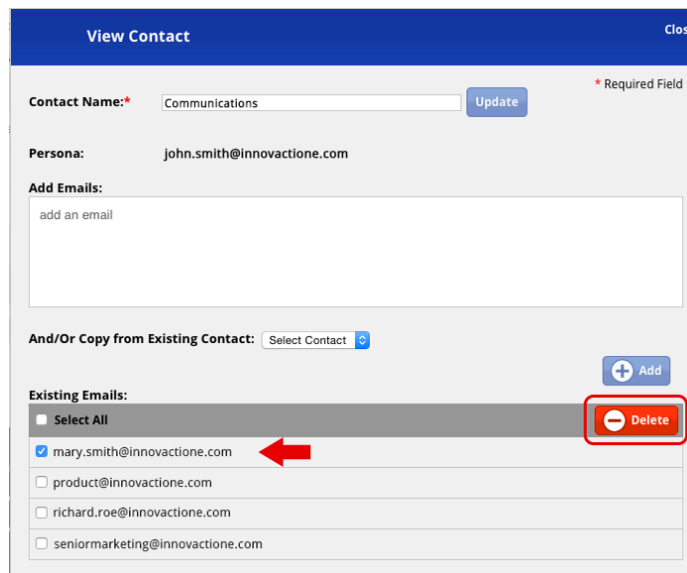


This screenshot shows the same 'View Contact' interface as the previous one. The 'And/Or Copy from Existing Contact' dropdown is now set to 'My Team'. The 'Existing Emails' section is expanded, showing a list of email addresses with checkboxes. The checkbox for 'jane.doe@innovactione.com' is checked, and a red arrow points to it. The 'Delete' button is highlighted with a red box.

3. Click on **Close**.

To remove recipients from a contact list:

1. Select the **contact list name** in your Connect – Address Book inbox (for instance *Communications*).
2. On the View Contact slider pane, check the box before the **email addresses** of the recipients you want to remove from the list. Click the **Delete** button.

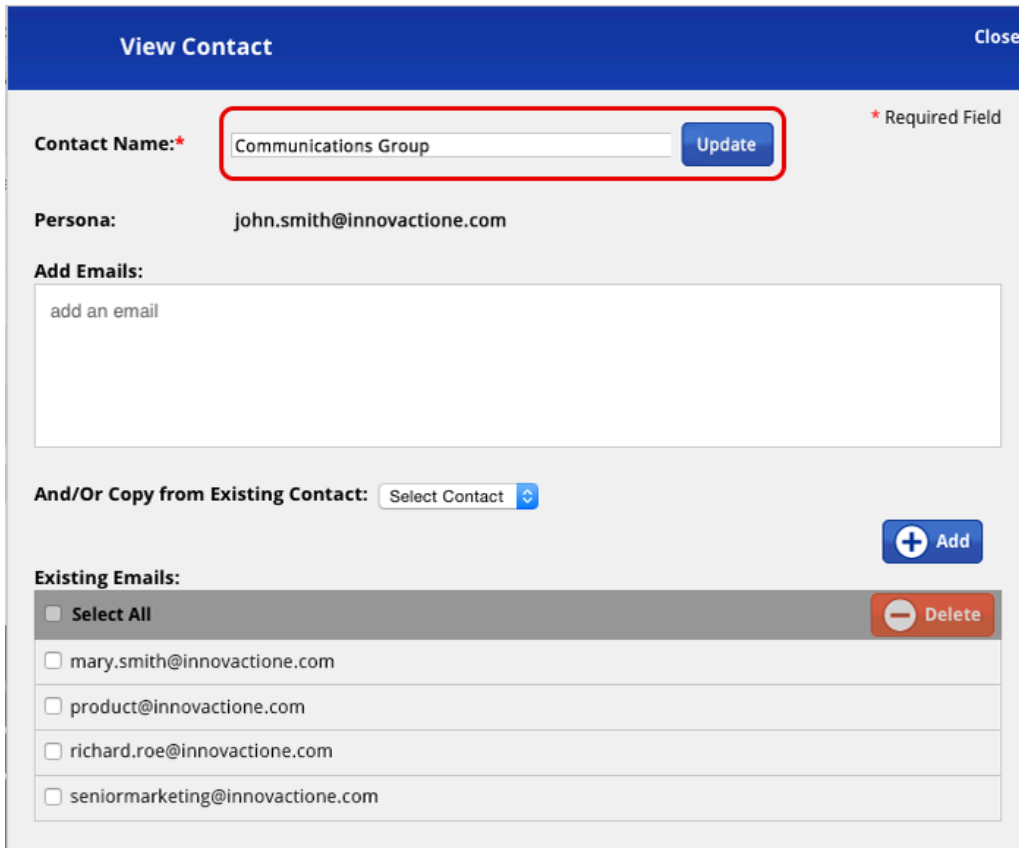


The screenshot shows the 'View Contact' interface. At the top, there is a 'Close' button. Below it, the 'Contact Name' field is set to 'Communications' with an 'Update' button and a '* Required Field' label. The 'Persona' field shows 'john.smith@innovactione.com'. There is an 'Add Emails' section with a text input field containing 'add an email' and an 'Add' button. Below that is an 'And/Or Copy from Existing Contact' dropdown menu set to 'Select Contact'. The 'Existing Emails' section has a 'Select All' checkbox and a 'Delete' button. A red arrow points to the checkbox for 'mary.smith@innovactione.com', which is checked.

3. Click on **Close**.

How do I rename a contact list?

1. Select the contact list name you want to rename (for instance *Communications*) in your Connect – Address Book inbox.
2. On the Contact Name bar of the View Contact slider pane, highlight and delete the actual contact name and enter the new contact name (for instance *Communications Group*). Click the Update button.



View Contact Close

Contact Name:* Update * Required Field

Persona: john.smith@innovactione.com

Add Emails:

add an email

And/Or Copy from Existing Contact:

+ Add

Existing Emails:

Select All - Delete

mary.smith@innovactione.com

product@innovactione.com

richard.roe@innovactione.com

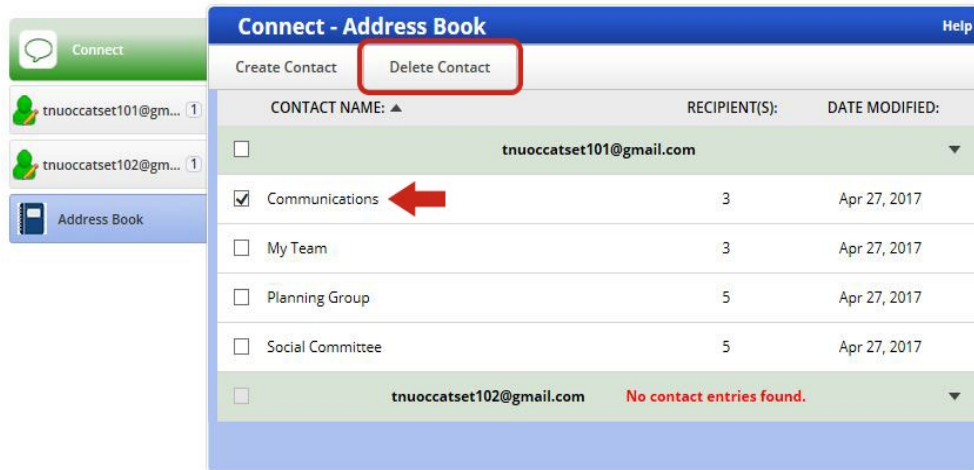
seniormarketing@innovactione.com

3. Click on **Close**.

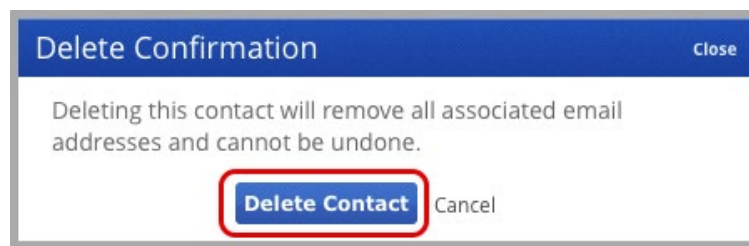
The updated contact name will now show in your Connect – Address Book inbox. The system will display the lists in alphabetical order.

How do I delete a contact list?

1. On your Connect – Address Book inbox, check the box before the contact list name you want to delete (for instance *Communications*) and click **Delete Contact**.



2. A dialog box will prompt you to confirm that you want to delete this contact list. Click the **Delete Contact** button.



The contact name will be permanently removed from the address book.

If you experience technical difficulties with the Connect service, please contact Customer Service at 1-877-376-1212 (available 24 hours a day).

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