CANADA POST — POSTES CANADA

Electronic Shipping Tools

User Guide

Online Version

Express Order Entry

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Ship in Canada - Secure Solution

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1.0   Introduction

About *Express Order Entry* – Ship in Canada – Secure solution

Express Order Entry - Ship in Canada - Secure solution provides the benefits of Canada Post *Electronic Shipping Tools* (EST) solution, accessible from the security of your corporate Web site. *Express Order Entry* - Ship in Canada is a fast, free and convenient way to prepare and pay for your Parcel orders in Canada.

Note: This solution can be customized to address your specific needs; therefore this guide is designed to take you through all the possible functionalities.

Access to Express Order Entry – Ship in Canada– Secure solution

The *Express Order Entry* – Ship in Canada - Secure solution is hosted on your own Intranet site. Click on the *SHIP IN CANADA* icon to display the shipping page.

To view step-by-step instructions of the solution, click on the HOW DO I tutorial. www.canadapost.ca/ESTHowDoI

You can choose the service and options that best suit your needs and budget. Such as:

Domestic

> ➢   Priority Courier
> ➢   Xpresspost
> ➢   Xpresspost Certified
> ➢   Expedited Parcel
> ➢   Regular Parcel
> ➢   Library Mail

For detailed information about a specific Service Offering, just click on the service above if you are reading this guide online. If not, please visit the Canada Post Web site,   http://www.canadapost.ca/business/default-e.asp
Shipping & Delivery, and then select the service from the drop down list.

2.0 *Express Order Entry* - Ship in Canada page

This page displays the *Express Order Entry* – Ship in Canada shipping page, where you will capture all the shipment information necessary to create your order.

Each field is described below.

Note: This solution can be customized to address specific needs and configuration. As such, some features might either be displayed differently, or not available depending upon the configuration of the version you need.

Note: A cookie stored locally on your machine will retain data from the following fields, and automatically populate them each time you open the solution: all fields associated with the "to" and "from" address, customer number, contract number, cost centre, reference number.

Should you not require this feature, simply ensure the cookie is turned off, and the screen will always be refreshed upon opening

The following table provides a description of the FIELDS component.

Fields	Description
FROM	**This section contains the following mandatory fields.**
Name*	Enter the name of the primary contact that is shipping a package.
Address/City/Province*	Enter the complete address of the primary contact.
Postal Code*	The postal code entered is associated with the Post Office where you will be depositing your package, and is used to determine the shipping cost. Click on *Search* to link directly to Canada post's Postal Code Look Up to find a postal code.
TO:	**This section contains the following mandatory fields.**
Name*	Enter the name of the recipient of the package.
Title/Dept/Company	Enter the Title/Department/Company name of the recipient.
Address / City / Province*	Enter the complete address information of the recipient.
Postal Code*	Enter the destination Postal Code. Click on *Search* to link directly to the Canada Post Postal Code Look-up to find a postal code.
SHIPMENT INFORMATION	**This section contains all necessary mailing information.**
Container*	This field displays a drop down list of all available container types. Select a pre-defined container or select "Other" and enter parcel dimensions.
Weight (kg)*	Enter the weight of the package, in kilograms.
Document	Select this checkbox when you are shipping a document; dimensions are not mandatory when you ship a document.
Length*	Enter the length of the package (in centimetres)
Width*	Enter the width of the package (in centimetres)
Height (cm)*	Enter the height of the package (in centimetres)
SERVICE/OPTIONS	**This section contains necessary Service/Options information.**
Service*	From the drop down list, enter the type of service you wish to use i.e. Priority Courier, Xpresspost, Expedited Parcel, Regular Parcel
Service Standard	The Service Standard is displayed after you click **Calculate**. It reflects the Service Standard associated to the Postal Codes entered in the TO and FROM section.
Coverage	Enter the value of the insurance coverage. Note: Coverage against loss or damage of up to $100 in value is included with Delivery Confirmation. Additional coverage can be purchased in increments of $100, up to $5,000 in value.

Cost Centre	Enter the cost centre used to allocate the costs of the shipping transactions.
Request Delivery Updates by email	Enter the email address of the recipient. This option allows you to request emails to be sent when your item is shipped, delivered, signature obtained or unforeseen delivery interruptions occur. This option is available for services with delivery confirmation (barcoded) only.
Reference Number	Allow you to enter your own unique reference number that will be linked to a Canada Post Item Number at the time of mailing. This reference number enables you to display the parcel tracking history just as you would with the Item Number.
Unpackaged	Check this box if your shipment is unpackaged.
Signature	Check this box if you require a signature upon delivery.
Mailing Tube	Check this box if you are using a cylindrical container (Mailing Tube) to mail your items.
PAYMENT INFORMATION	**This section contains necessary Payment information:**
Mailed by*	This field is mandatory. Enter the customer number of the customer preparing the mailing.
Contract *	This field is mandatory. Enter the contract number associated with the customer number identified in the Mailed by field.
Method of Payment *	Select from the drop down list a method of payment for the shipment
Credit Card No.:	Enter the credit card number
Credit Card Type	Enter the card type i.e. American Express, Master Card or Visa Card
Name on the credit card	Enter the name as it appears on the Credit card.
Expiry Date	Enter the expiry date of the credit card in the following format: MM/YY
Credit Card Verification Number *(**Venture 1 customers only**)	Enter the unique ID number displayed on the selected credit card
PREVIEW ORDER	**This section displays a Command Button to calculate your order and display the Service Standard of the Item.**
COMPLETE ORDER	**This section allows you to enter all additional information to complete your order.**
Email Address to Receive Label	Enter the Email address of the recipient who will be receiving the label.
Password to Authorize Use	Enter the password to authorize use of the application. **Note:** The use of password is optional, however, if the field is displayed on your screen, it becomes mandatory: You are required to enter it each time you open a session.

The following table provides a description of the COMMAND BUTTONS functionality.

Command Buttons	Result of invocation
Calculate	Click this command button to calculate the rates. The information displayed in this section is generated from the information captured in the "From" and "To" sections. The cost of the shipment and the Service standard are displayed.
Clear	Click this command button to clear all data fields with editable values. The cursor will position on the first field.
Print label	Click this command button to generate the printing of an address label within the browser after a shipping item has been successfully submitted to Canada Post.
Send Label	Click this command button to send an Email notification after you have entered a valid Email address in the "Email Address to Receive Label" field. **Note:** A warning message requires confirmation before the Email is sent and a confirmation message is returned with a purchase order number.
Retrieve from Address Book	This button allows you to select a single address from the Address Book. You are able to store, search and retrieve up to 5000 addresses. **Note:** to add or modify entries in your address book, you must use the Add/Modify Address Book link located at the top of the screen. See information in the following table.

3.0 Creating Your Order

Creating your Order with the *Express Order Entry – Ship in Canada* solutio*n* is simple; there are **only a few steps** involved. The following section will guide you through the creation process of your order i.e. completion of customer information, deposit of the shipment, calculation of the postage and the printing of the Address label.

3.1 Add/Modify Address Book functionality

This page allows you to enter detailed information data about your clients, such as:

- ➢ Name of the client,
- ➢ Title/Company/Department
- ➢ Address information
- ➢ Telephone/Fax number of the contact
- ➢ Email address

You are able to store up to 5000 clients in your Address Book list.

To update or remove a client from your list, simply select a record and enter the new information.

Multiple address books can be created within your main address book
You may import an address book that was exported from the desktop, and vice versa (Note: comma-delimited formats)

Address books can be shared between Order Entry and Express Order Entry

You can perform a client search in either a specific address book, or across all your address books. Simply specify the search criterion (any field) then click the **Search** command button.

To cancel the search function, simply click on the **Reset** command button.

The following table provides a description of the COMMAND BUTTONS functionality.

Command Buttons	Result of invocation
Search	Click command button to perform a specific search from your Address Book list.
Reset	Click this command button to perform another specific search.
Add (Canada)	Click this command button to create a new client

3.2 "From" section

This page allows you to enter the name and address information, including the postal code of the primary contact of the **"From"** section.
Or, you may retrieve such information directly from the Address Book by simply clicking on the **Retrieve from Address Book** radio button and the fields will be automatically populated.
You may click on **Search**, which is a direct link to Canada Post Postal Code Look-up, to find a specific postal code.
Note: The postal code is used to determine both the Post Office where you should deposit your shipment, as well as the shipping cost.

3.3 "To" section

	This page allows you to enter the name and address information of the primary contact of the **"To"** section. Or, you may retrieve such information directly from the Address Book by simply clicking on the **Retrieve from Address Book** radio button and the fields will be automatically populated. You may click on **SEARCH**, which is a direct link to the Canada Post Postal Code Look-up, to find a specific postal code. **Note:** The postal code is used to determine both the Post Office where you should deposit your shipment, as well as the shipping cost.

3.4 "Shipment Information" section

	This section allows you to capture all necessary Shipment Information details, such as: ➢ Container type ➢ Weight (in kg.) ➢ Document – When selected the dimensions are not required. ➢ Length (in cm.) ➢ Width (in cm.) ➢ Height (in cm.)

3..5 "Service/Options" section

	This section allows you to indicate the type of service and options you wish to use, such as: **Services:** ➢ Service (type) ➢ Coverage ➢ Cost Centre ➢ Service standard (automatically populates when you click on **Calculate**) ➢ Request Delivery Updates by email ➢ Reference Number **Options:** ➢ Unpackaged ➢ Signature ➢ Mailing Tube

3.6 The <Modify> functionality for the Delivery Updates by email option.

When you click on the **Modify** button from the order page, this page opens allowing you to set or modify your Delivery Updates by email.

The **Email Subject line**, in a drop-down menu format, offers you two (2) choices of entry:

❑ Tracking Number (defaulted)

❑ Reference Number

The **Email addresses and types of delivery updates** area where you indicate the email address(es) of those that you would like to have emails sent to when one of the three (3) scan events happen on the item. Select the types of events that you would like each recipient to receive: Ship, Exception or Delivery.

The personalize your message area – text only with a maximum of 150 characters (no image or logo).

3.7 "Payment Information" section

In this section, you are required to provide information about the payment of your shipment, such as:

➢ Mailed by (Customer Number)

➢ Contract Number

➢ Method of Payment (Metered, Account, Credit Card or Stamps)

Note: If you select Credit Card as the Method of payment, you must complete the following fields:

➢ Credit card number

➢ Credit Card Type

➢ Name (appearing on the card)

➢ Expiry (Month and Year appearing on the card)

➢ Credit Card Verification Number (**Venture 1 customers only**)

3.8 "Preview Order" section

This section allows you to preview your order
Click **Calculate** to rate your order. The value of your order will automatically be calculated. The information displayed in this section is generated from the information captured in the "FROM" and 'TO" sections.
The cost of the shipment and the service standard are displayed.

- ➢ Base
- ➢ Automation Incentive
- ➢ Fees
- ➢ Taxes (GST/HST/PST)
- ➢ Total

3.9 "Complete Order" section

Following the Preview of your order, you must complete your order by providing the following information:

- ➢ **Email Address to Receive Label** - Specify an accurate Email Address to notify recipient(s) about the shipment.
- ➢ **Password to Authorize use** - Specify a password for the recipient to use upon receipt of your Email to print of the shipment label.
- ➢ Selecting the **"I agree to the terms and conditions"** box will allow you to press "**Print Label**" to complete your order.

If you click the **Clear** command button, all data fields of editable values will be cleared. The cursor will be positioned on the first field of the *Express Order Entry – Ship in Canada* shipping page.

When you click the **Send Label** command button, an Email notification is sent to the recipient (Email address to receive the label) with the message that a postage paid shipping address label is provided for usage when shipping a package to the originator of the Email.
The recipient can access the shipping address label up to 7 days after the "send" date of the Email. The printing of the label simply requires a click on the link provided.
If the link is not active, then:

- ➢ Copy the link text and paste it to your browser
- ➢ Click the printer icon on the browser tool bar
- ➢ Select printer and click OK
- ➢ Follow the mailing instructions printed on the page.

Note: To print the shipping label, Adobe Acrobat Reader version 5 or later is required. If you do not have Adobe Acrobat, simply click on the direct link to install it.
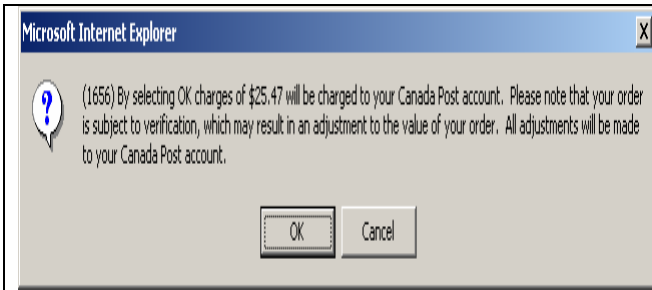
	When you click on the PRINT LABEL command button, a proof of payment pop up message is displayed (see example of message when method of payment is *Account)*
Microsoft Internet Explorer [X] (1656) By selecting OK charges of $25.47 will be charged to your Canada Post account. Please note that your order is subject to verification, which may result in an adjustment to the value of your order. All adjustments will be made to your Canada Post account. [OK] [Cancel]	Click OK to display the next page.

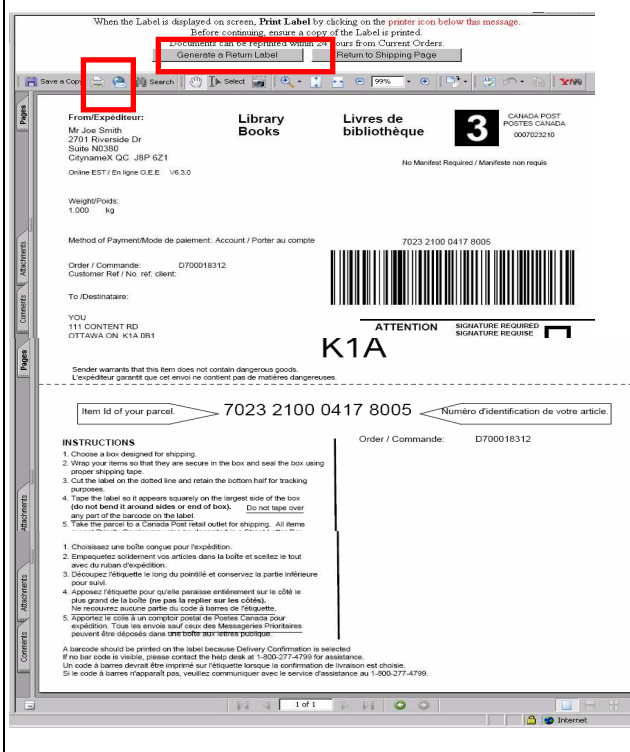|	When the shipping label is displayed on the screen, click on the **Printer icon** located on the top navigation tool bar to print it.
When the Label is displayed on screen, **Print Label** by clicking on the *printer icon below this message.* Before continuing, ensure a copy of the Label is printed. Documents can be reprinted within 24 hours from Current Orders. [Generate a Return Label] [Return to Shipping Page] From/Expéditeur: Mr Joe Smith 2701 Riverside Dr Suite N0380 CitynameX QC J8P 6Z1 Online EST / En ligne O.E.E V6.3.0 Library Books Livres de bibliothèque **3** CANADA POST POSTES CANADA No Manifest Required / Manifeste non requis Weight/Poids: 1.000 kg Method of Payment/Mode de paiement: Account / Porter au compte 7023 2100 0417 8005 Order / Commande: D700018312 Customer Ref / No. ref. client: To /Destinataire: YOU 111 CONTENT RD OTTAWA ON K1A 0B1 **ATTENTION** SIGNATURE REQUIRED SIGNATURE REQUISE **K1A** Sender warrants that this item does not contain dangerous goods. L'expéditeur garantit que cet envoi ne content pas de matières dangereuses. Item Id of your parcel. ▸ 7023 2100 0417 8005 ◂ Numéro d'identification de votre article. **INSTRUCTIONS** Order / Commande: D700018312 1 of 1	Before continuing with your order, **ensure** that you have printed a copy of the **label**. Click on **Return to Shipping Page** to create a new order. **Note:** If you are mailing Library Books, you have the option to print either a shipping Label or a Return Label. To print a shipping label, click the printer icon on the navigation bar at the top of the screen; to print a return label, select *Generate a Return Label* button at the top of the screen and click the printer icon when the return label displays. This is a sample of an *Express Order Entry – Ship in Canada* label printed on Plain paper. **Note**: In order to facilitate account reconciliation processes, the order number appears on both portions of the Online shipping labels for all services. The corresponding tax registration numbers appear beside the GST, QST and HST tax amount on the shipping labels of Credit Card orders.

3.10   View Current Orders
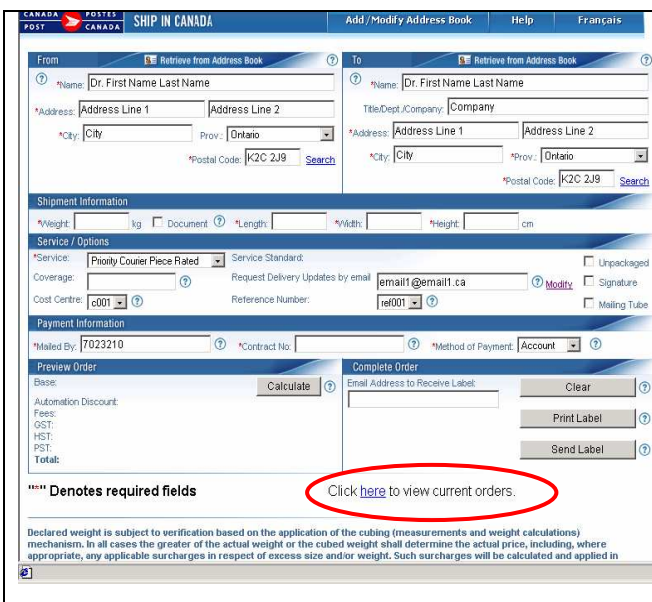
	To simplify the creation flow, and to allow you to always have the opportunity to successfully print your documents, a new link **View Current Orders** has been added directly to this page.

CANADA POST POSTES CANADA **SHIP IN CANADA** Add /Modify Address Book Help Français
 	
From Retrieve from Address Book   **To** Retrieve from Address Book
*Name: Dr. First Name Last Name   *Name: Dr. First Name Last Name
*Address: Address Line 1 Address Line 2   Title/Dept./Company: Company
*City: City Prov.: Ontario   *Address: Address Line 1 Address Line 2
*Postal Code: K2C 2J9 Search   *City: City *Prov.: Ontario
  *Postal Code: K2C 2J9 Search
 	
Shipment Information
*Weight: kg □ Document *Length: *Width: *Height: cm
 	
Service / Options
*Service: Priority Courier Piece Rated Service Standard: □ Unpackaged
Coverage: Request Delivery Updates by email email1@email1.ca Modify □ Signature
Cost Centre: c001 Reference Number: ref001 □ Mailing Tube
 	
Payment Information
*Mailed By: 7023210 *Contract No: *Method of Payment: Account
 	
Preview Order **Complete Order**
Base: Email Address to Receive Label:
  [Clear]
Automation Discount:
Fees:
GST: [Print Label]
HST:
PST: [Send Label]
Total:
 	
"*" Denotes required fields   Click here to view current orders.
 	
Declared weight is subject to verification based on the application of the cubing (measurements and weight calculations) mechanism. In all cases the greater of the actual weight or the cubed weight shall determine the actual price, including, where appropriate, any applicable surcharges in respect of excess size and/or weight. Such surcharges will be calculated and applied in
	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.

Click on the printer icon in order to print your document.

Note: To affix the same label on more than one item is considered a fraudulent act. |

4.0 "Help" Section

| | Direct link to the **EST Help Centre** where you can click on the How do I to consult the automated tutorials demonstrating the features and functionalities of both the generic and secure versions of our Express Order Entry – Ship in Canada solution, consult the latest version of the EST Update Newsletter, the EST User Guides and other type of supporting documentation/tools. |