Instructions
"letters dispatch list"
online service

**SWISS POST**

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1.   Introduction

1.1   Purpose of the document

The following document is a guide to the "Letters dispatch list" online service (www.swisspost.ch/online-services).

2.   Create new order

To create a dispatch list or delivery note, click on the "Create new order" action button, or you can also copy a corresponding order under actions using the "Create new order" function (cf. section 3.2 Selecting actions).
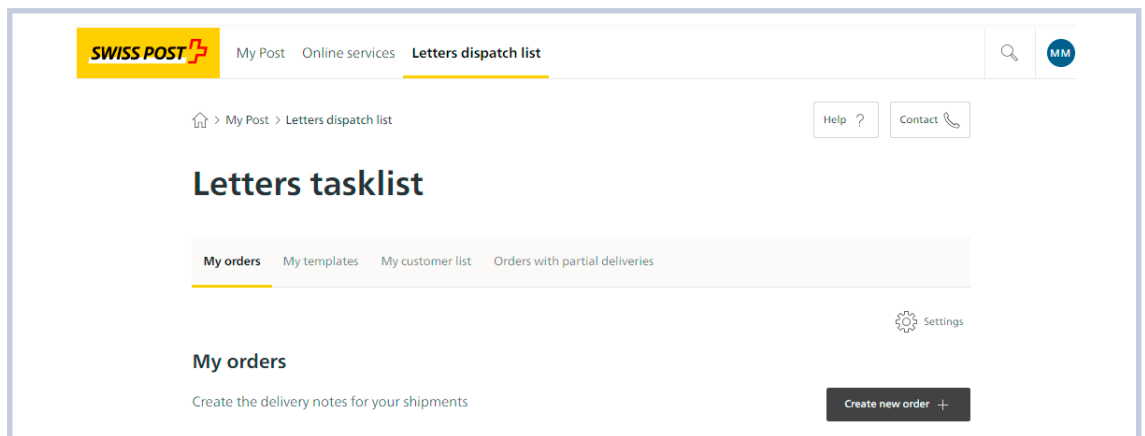
2.1 Sender screen

In the first sender process step, the sender and dispatcher details are entered. The sender is the purchaser and invoice recipient of the dispatch list/delivery note. The dispatcher executes the order and gives the delivery note to a designated acceptance point.

2.1.1 Sender address

I am the sender

The invoice reference number and franking licence are automatically applied in accordance with the settings in the user account. If the user account settings include several invoice references and franking licences, you can select one from the relevant list fields.

I am not the sender

If you want to enter a different invoice reference number, select the "I am not the sender" option field. Here, you can either select the sender via the "Customer list" or enter the 8- or 9-digit invoice reference number and confirm it using the "Verification" button.

The sender data are completed automatically after "Verification" of the invoice reference number.

2.1.2 Dispatcher's address

The dispatcher is automatically applied based on the login and the "I am handing the shipment over" checkbox is pre-filled. In this case, the address is only displayed on screen 5 "Complete".
If you want to enter a different dispatcher, de-select the "I am handing the shipment over" checkbox. You can then select the dispatcher from your customer list. Instead of using the customer list, you can enter the 8- or 9-digit invoice reference number or the AMP key and add the dispatcher using the "Verification" button.

2.1.3 Skip screen

If you enter the same data for every order, you have the option of skipping this page. To do this, select the checkbox "Skip this stage in the future and apply the data entered above for every further order. This skipping of the stage can be reversed in the settings".

This option can be edited in the settings. For more information about the settings, see section 4 Settings.

Note: if you have created a customer list, you cannot skip the first screen.

2.2 Product selection

2.2.1 When would you like to mail the consignments?

In the "When do you wish to hand over the shipment?" field, "today's date" is automatically pre-filled. Click on the calendar symbol in order to change the date of posting. The date of posting cannot be in the past and must not be more than 60 days in the future.

2.2.2 Product selection

In the production selection process step, you can enter our products and value-added services either via the quick selection or via the domestic and abroad boxes.

2.2.2.1 Quick selection

Your favourites are displayed in the quick selection. These are either the products you most frequently declare or those you have saved as favourites in your settings.

You can enter a search term directly in the field to filter the product list. Or you can use the drop-down menu.

2.2.2.2 Manual product selection

First select either "Domestic" or "Abroad" as the destination, then select the shipping option.
Confirm this information using the "Accept" button.

Select the product under "Size and weight" and then enter the necessary information such as weight, number of consignments and any value-added service.
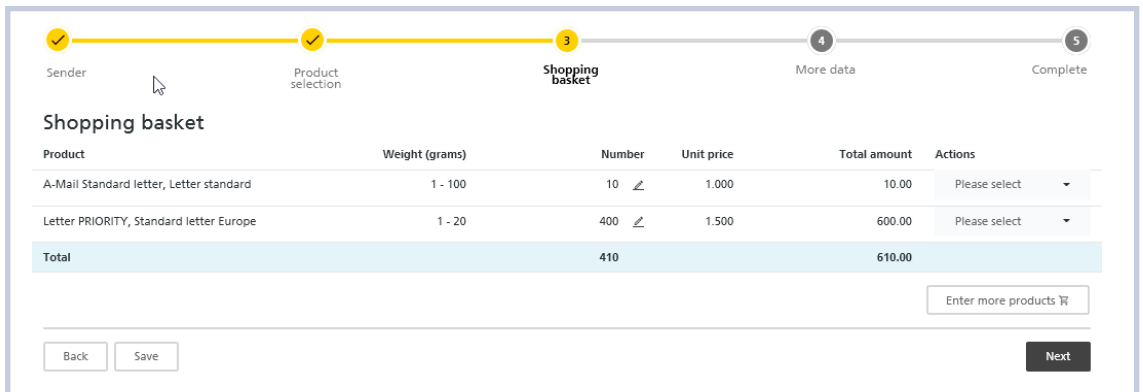
Confirm this information using the "Add to basket" button. You can then choose between "Continue to basket" or "Enter more products":
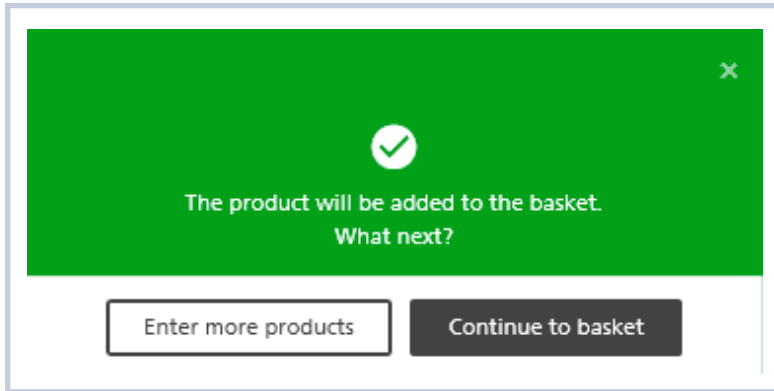
2.3   Shopping basket

All products and value-added services created are listed in the shopping basket.

2.4   More data

2.4.1 Dispatch type

Check the dispatch type. The system automatically selects "PP franking".
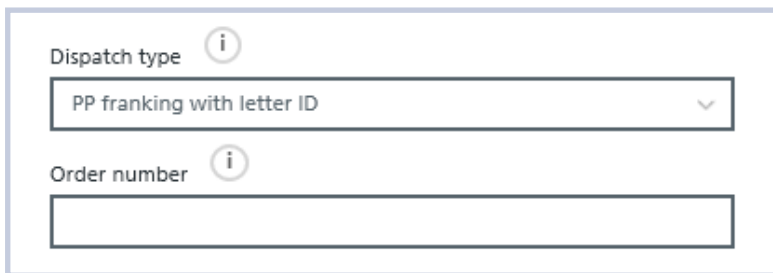
Dispatch type ⓘ

| PP franking | ⌄ |

You can change this as follows to:
– PP franking
– PP franking with letter ID
– Dispatch confirmation of franked consignments (IFS or traditional or digital stamps)
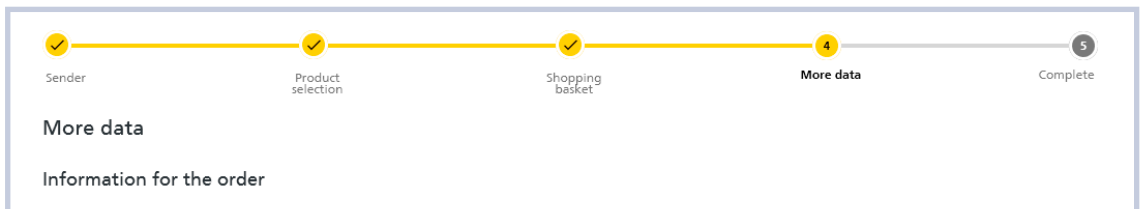– IFS franking, invoice to third party

2.4.1.1 Postage paid impression with Letter ID
If your consignments contain a dynamic data matrix code, select "PP franking with letter ID" then enter the 6-digit order number contained in the data matrix code.

Dispatch type ⓘ

| PP franking with letter ID | ⌄ |

Order number ⓘ

| |

2.4.1.2 Dispatch confirmation of franked consignments
If your consignments are franked with IFS or stamps, enter the "Dispatch confirmation of franked consignments" dispatch type. Then select the "IFS" or traditional or digital stamps" franking type and in the "franked amount" field enter the total amount of all franked consignments (not the product amount but the total amount of all consignments franked with IFS or stamps).

The total amount of all products entered (postal charge) is applied by pressing the "Copy total amount" button.

Dispatch type ⓘ

| Dispatch confirmation franked consignments | ⌄ |

Franking type

| | ⌄ |

Franked amount ⓘ

| | Copy total amount |

2.4.1.3 IFS franking, invoice to third party

If you have an IFS machine and deliver for third parties, you can select this dispatch option. The consignments are charged to the sender and the amount you have already paid for IFS franking is credited on your next monthly invoice.

In the "IFS number" field, select your machine and enter the total amount of all IFS franked consignments in the "Franked amount" field.

Dispatch type ⓘ

IFS franking invoice to third party ⌄

Franking type
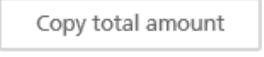
IFS ⌄

IFS number

⌄

Franked amount ⓘ

Copy total amount

2.4.2 Customer reference

You can enter an individual designation for the order (max. 40 characters). If you have stored designations in the settings, you can select these in the "Use text component" field.

Customer reference

Customer reference for the order (optional) ⓘ

Provide a custom description for the order

Use text component ⌄

2.4.3 Customer receipt delivery

Once a consignment has been mailed, a customer receipt is automatically created by the system. This can be found in the order overview using the status "Completed". If you enter one or more e-mail addresses, the customer receipt is also sent by e-mail.

2.4.4 Skip screen

If you enter the same data for every order, you have the option of skipping this page. To do this, select the corresponding "checkbox":

This function can be reset in the settings.

For more information about the settings, see section 4.

2.5   Screen 5: Complete

On the last screen, "Complete", all data entered are displayed. Check this information then confirm the "mailing conditions" and press the "Place and print order with costs" button.

Open the document and print it. You can now take the consignments together with the delivery note to the nearest post office or have them collected by Swiss Post.

3.   Order overview

All orders created during the last six months can be found under "My orders". You can use the filter functions to search for orders according to certain terms.

3.2   Actions

You can perform several actions for the selected order via the order overview:

| Action	Description
View	Orders that have been printed can no longer be edited Select the "View" action to obtain detailed information about the order.
Create new order	The application switches to the creation process in which the copied order can be edited. When copying, "today's date of dispatch" is applied. Some information, such as the order number for a Letter ID order, is not copied and must be entered again.
Delete	The order is deleted from the system. This is not possible for orders which have already been dispatched to and checked by the acceptance point ("Dispatched", "Acceptance confirmed" and "Completed" statuses).
Save as a template	Use this option to prevent your template from being removed from the overview during archiving and from being copied. Orders not marked as a template are no longer displayed in the overview after a period of 60 days.
Print delivery note	The delivery note for the selected order is printed. Orders with "Pending", "Dispatched" and "Acceptance confirmed" statuses cannot be printed.
Print customer receipt	The customer receipt for the selected order is printed. This action is only possible for orders which have already been dispatched to and checked by the acceptance point ("Dispatched", "Acceptance confirmed" and "Completed" statuses).
"+"	You can use the "+" symbol to open the order and view more information.

4. Settings

Users who are registered as administrators of their company can define default values, record customer references and assign authorisations in the settings. Some functions are also available to employees with the role of "user".

Settings

Sender   Manage fast selection   More data   Data export
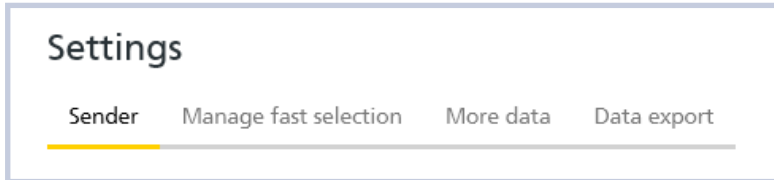
4.1   Sender – Speed capture

If you have activated skip page when registering screen 1 Sender, you can deactivate it again here.

Speed capture

The "Sender" stage is currently skipped. Do you want to stop skipping?

Stop skipping
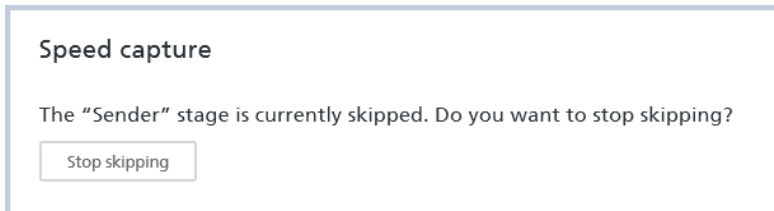
4.2   Sender – Additional text invoice reference number

Here, you can enter a comment of up to 25 characters for every invoice reference number. This designation is then displayed when registering the order.

Additional text invoice reference number

Additional text for invoice reference number ⓘ

Invoice reference number	Additional text	
	Test	✎
		✎ Add
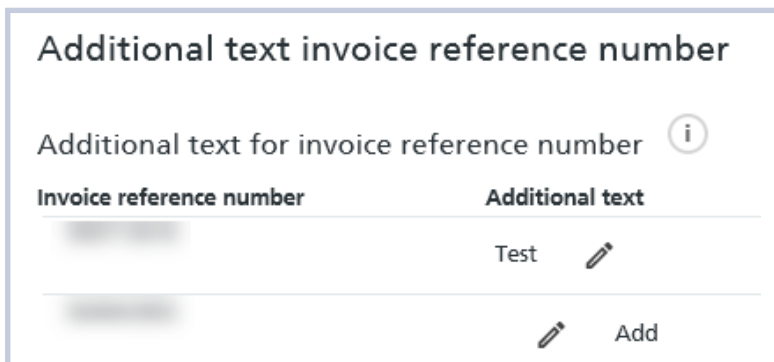
4.3 Sender – Customer list

Service providers can create their own individual customer list.
– To do so, activate the "My customers" box. The "My customer list" heading can then be seen on the homepage.
– You can authorise your employees to add more customers to the list.

4.4 Sender – Authorisations

Enter the e-mail address (username) for the desired employee in your company and click on the "Search" button. A precondition for this is that the person already has a login for the "My Post" customer portal on www.swisspost.ch.
Select the "Administration" checkbox to define the user as an administrator.
Under authorised franking licences, you can withdraw the employee's authorisation to use the individual franking licence by deselecting the corresponding checkbox.

4.5   Manage fast selection

Select your favourite products that, on product entry, you wish to have displayed in the fast selection.

The "Restore default selection" function enables you to adjust the product selection to a default selection predefined by the system.

4.6   Additional data – Speed capture

If you have activated skip page when capturing screen 4 Additional data, you can deactivate it again here.

4.7 Additional data – Entering the cost center

If you have stored cost centers in your user account settings, you can select them in screen 4 "Additional data". Here, you can define the entry of a cost center as a "mandatory field".

4.8 Additional data – Customer reference for the order

Under text block, you can pre-enter frequently used customer references.

Select the checkbox "Yes, the customer reference for an order is a mandatory field" to ensure that a customer reference is always indicated when creating a dispatch list.

You can pre-enter up to 50 frequently used customer references.

4.9 Additional data – Customer receipt delivery

Company-wide e-mail addresses
– Here you can enter up to 10 e-mail addresses to which the customer receipt should always be sent automatically, regardless of which option is selected for sending the customer receipt in the order creation.

Stored e-mail addresses
– Here you can enter up to 50 e-mail addresses which are available in screen 4 "Additional data" when creating an order. The customer receipt will then be sent to the e-mail address selected in screen 4.

4.10 Additional data – labelling for outer containers

For every order, you have the option of printing an address for the outer container for every product entered. Activate this function here for screen 4 "Additional data" .

4.11 Additional data – Letters with proof of delivery

For consignments with proof of delivery, a barcode list is required when posting.
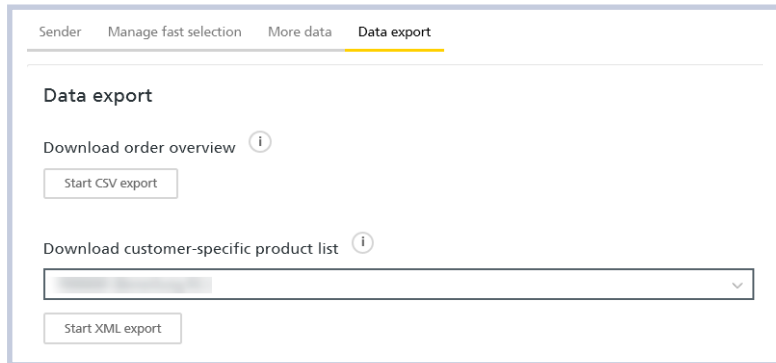Here, you can indicate which list should be used as the default list.

4.12 Data export – Order overview

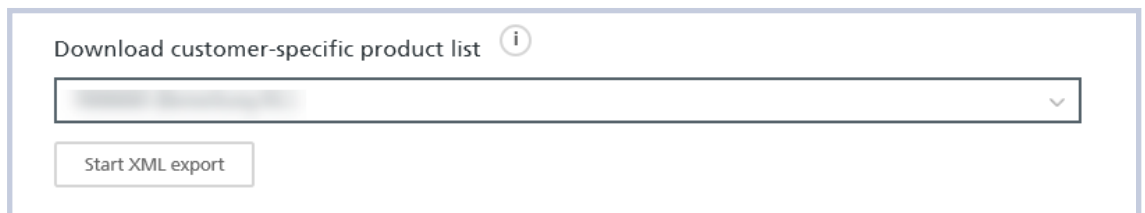Here, all orders which are displayed in the order overview can be exported. (Product information is not included).

4.13 Data export – Product list

The product list is required by customers who use the order data via the electronic DataTransfer interface. The product list is exported as an XML file and can be imported by IT specialists into their own production system.
Select the desired franking licence and click on the "Start XML export" action button.