

iAddress™ Cloud Quick Start Guide

iAddress™ Cloud setup

Access the iAddress™ Cloud software here: <https://online.flagshipsoftware.com>

Select “Register New User”, enter your serial number that was provided to you by Flagship Software, and complete the form:

The image shows two screenshots of the iAddress™ Cloud software interface. The left screenshot is the 'Login Information' page, featuring input fields for 'Email:' and 'Password:', a 'Manager Login' checkbox, and a 'Login' button. Below the fields are links for 'Register New User' and 'Forgot your password?'. The right screenshot is the 'Register a new user' page, featuring input fields for 'First Name', 'Last Name', 'Email Address', 'Password', 'Re-Type Password', and 'Flagship Serial#'. Below the fields are 'Register' and 'Cancel' buttons.

This notification will advise you that an email has been sent to the email address registered.

iAddress™ Online Registration Confirmation / iAddress™ Confirmation de compte en ligne

A confirmation email has been sent to your email address. After you receive the confirmation email, please follow the instruction to activate your iAddress™ Online account.
Note: If you do not receive the message, please check your spam or junk folder to see if it was put there by mistake.

Un courriel de confirmation a été envoyé. Après avoir reçu le courriel de confirmation, veuillez suivre les instructions pour activer votre iAddress™ compte en ligne.
Remarque: Si vous ne recevez pas le message, veuillez vérifier votre dossier de spam ou de courrier indésirable pour voir s'il y a été placé par erreur.



To complete the registration process, follow the instructions in the email to download an authenticator and scan the QR Code.

Once registered, log in as below. You will be prompted for the authentication code, or you can choose to send it to your email that was used to register your account by selecting “Send one time code”.

The image shows two screenshots of the iAddress™ Cloud software interface. The left screenshot is the 'Login Information' page, featuring input fields for 'Email:' and 'Password:', a 'Manager Login' checkbox, and a 'Login' button. Below the fields are links for 'Register New User' and 'Forgot your password?'. The right screenshot is a confirmation dialog with a text input field for 'Enter the key:', 'Confirm' and 'Cancel' buttons, and links for 'Resend QR code?' and 'Send one time code'.

Dashboard:

This view gives a snapshot of any recent jobs that have been processed, subscriptions, quota and datasets.

The icons at the top are highlighted below.

The dashboard features a top navigation bar with icons for Home, Profile, Settings, Help, Shopping Cart, and User. The sidebar menu includes: Dashboard, Create CA job, View completed jobs, Company Information, and Customer Information.

Welcome Carolyn to iAddress™!

Recent Jobs

Job Name	Job Start Time	Time of Job Completion	Elapsed Time
Tâche 3	2023-06-07 12:03:36	2023-06-07 12:05:11	1 minutes 35 seconds
Job 2	2023-06-07 12:00:54	2023-06-07 12:02:28	1 minutes 34 seconds
Demo Job	2023-06-07 11:58:05	2023-06-07 11:59:47	1 minutes 42 seconds
Demo Job	2023-05-31 12:49:34	2023-05-31 12:51:36	2 minutes 2 seconds
SEED TEST	2023-05-30 13:54:29	2023-05-30 13:55:28	59 seconds

Subscriptions

Product	Remaining	Subscription Start	Subscription End
iAddress™ V5 PRO Full CA	ACTIVE	2023-05-01	2026-06-01
iAddress™ Canadian NCOA	9752610	2021-09-23	2025-10-01
CA Geocoding	ACTIVE	2019-01-01	2025-01-31

Quota
Number of jobs: 128
Storage space used: 53.96 MB

Datasets
(B) [Data 1] CA: 2023-05-12 To 2023-06-15
(Y) [Data 2] CA: 2023-06-16 To 2023-07-13

Profile:



Change Password:

The profile dropdown menu includes: Change Password, License Agreement, Logout, Company Information, and Customer Information.

Change Password

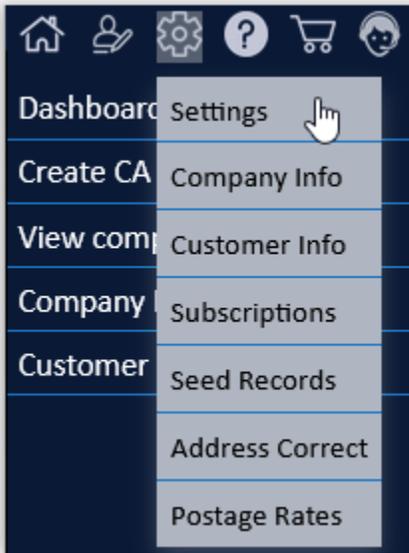
Old Password:

New Password:

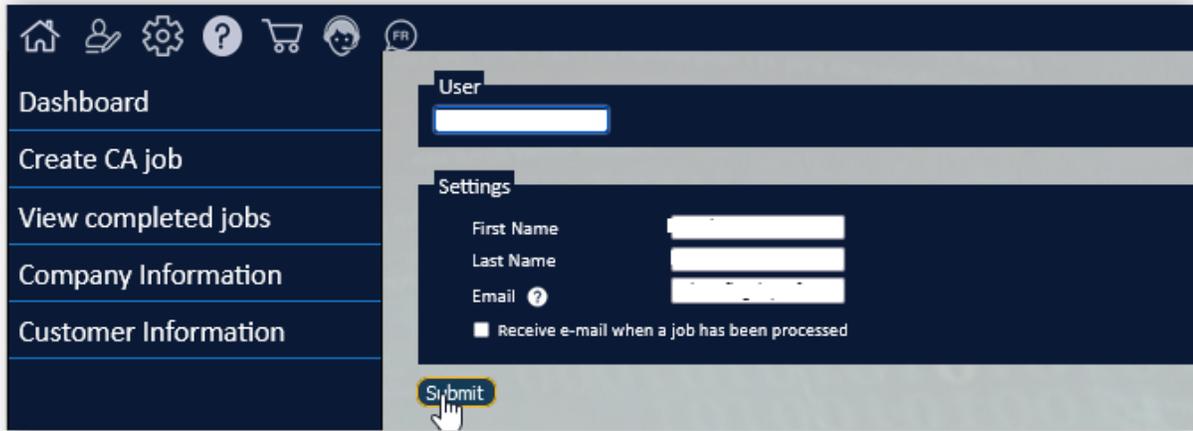
Re-Type Password:



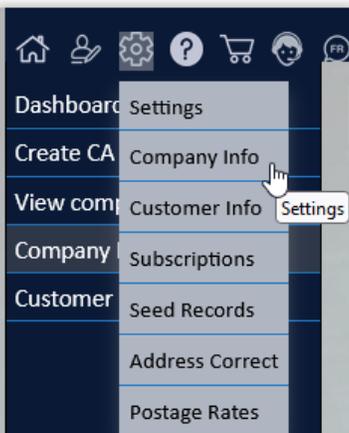
Settings:



Your serial number, name and email associated with this account will appear here:



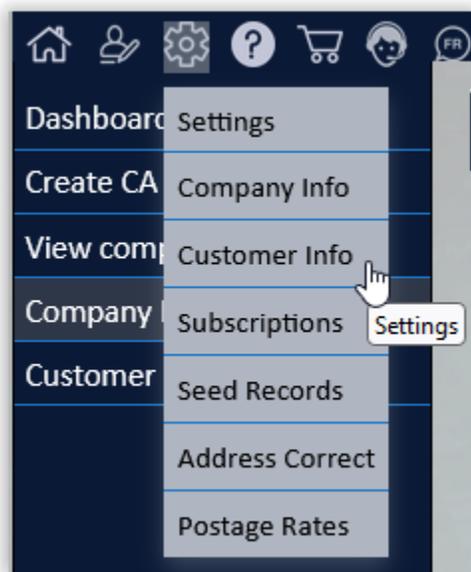
Company Info:



Complete your company information, including NCOA Terms of Use ID (SP or EU) as applicable, then Save Record:

A screenshot of a company information form. The form has several input fields: Company Name*, Contact Name, Customer Address*, City*, Province*, Postal Code*, Country*, Telephone Number, Tax Rate* (13 = 13%), Email, Office Of Deposit* (with a 'List' button), Office Postal Code*, Office Site Number*, and Terms of use id. The Terms of use id field has a dropdown menu open with options SP, EU, and SP. At the bottom left, there are two buttons: 'Save Record' and 'Cancel'. A hand cursor is pointing at the 'Save Record' button.

Customer Information:



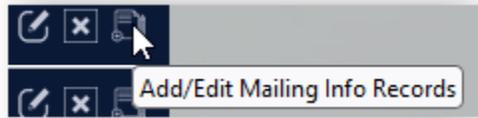
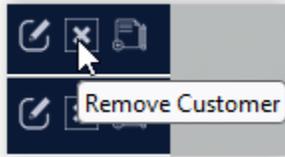
Add your customer profiles and save the record after each entry. Don't forget to add their mailing info (as circled):

A screenshot of a list of customer profiles. Each profile row contains fields for Company Name*, Contact Name, Customer Address*, City*, Province*, Postal Code*, Country*, Telephone Number, Tax Rate* (13 = 13%), Email, Office Of Deposit* (with a 'List' button), Office Postal Code*, Office Site Number*, and Terms of use id. The first row shows 'ABC Company Ltd.' with '1-2 Vata Court' and 'Aurora' in the address and city fields. The second row shows 'XYZ Company Ltd.' with '1-2 Vata Court' and 'Aurora'. The third row shows 'DCF Company Ltd.' with empty fields. The fourth row shows 'Flagship Software Ltd.' with 'Sales dept.' in the contact name field and '1-2 Vata Court' and 'Aurora' in the address and city fields. The fifth row is empty. At the bottom left, there are two buttons: 'Save Record' and 'Cancel'. A hand cursor is pointing at the 'Save Record' button. A red circle highlights the 'Save Record' button in the top right corner of the first row.

You can edit:

Remove:

Add mailing info



Company Name* : ABC Company Ltd. Contact Name : Customer Address* : 1-2 Vata Court City* : Aurora Province* : ON

Postal Code* : L4G 4B6 Country* : Telephone Number : Tax Rate* (13 = 13%): 13 Email : sales@abc.com

Office Of Deposit* : List MISSISSAUGA ON Office Postal Code* : L4W1S2 Office Site Number* : I029 Terms of use id : EU 000000000

Save Record Cancel

Subscriptions:

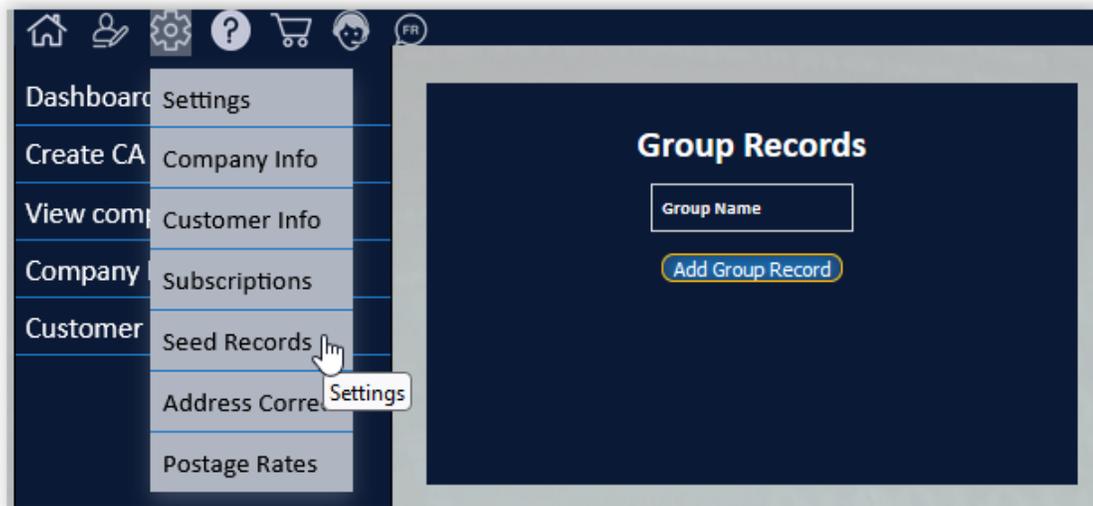
THIS IS AN EXAMPLE ONLY: Your version of Cloud will appear below, and any add-ons purchased.:

The screenshot shows a software interface with a navigation menu on the left and a main content area. The navigation menu includes: Dashboard, Settings, Create CA, Company Info, View comp, Customer Info, Company, Subscriptions (highlighted with a mouse cursor), Customer, Seed Records, Address Correct, and Postage Rates. The main content area is titled "Subscriptions" and contains a table with the following data:

Product	Remaining	Subscription Start	Subscription End
iAddress™ V5 PRO Full CA	ACTIVE	2023-05-01	2026-06-01
iAddress™ Canadian NCOA	9792452	2021-09-23	2025-10-01
CA Geocoding	ACTIVE	2019-01-01	2025-01-31

Seed Records:

Option to add seed records:



Add Group, then save record:



Then add or edit seed record:



Seed Records for ABC Company

Seed Record

First Name :
 Last Name :
 Name 1 :
 Name 2 :
 Name 3 :

Address 1 :
 Address 2 :
 City :
 Province :
 Postal Code :

[Save Record](#)
[Remove Record](#)

[Add seed record](#)
[Back to Groups](#)

There is the option to edit or remove any time:

Seed Records for ABC Company

Seed Record

First Name :
 Last Name :
 Name 1 :
 Name 2 :
 Name 3 :

Address 1 :
 Address 2 :
 City :
 Province :
 Postal Code :

[Edit Record](#)
[Remove Seed Record](#)

[Add seed record](#)
[Back to Groups](#)

Seed Records

Add Seed Records:

Group

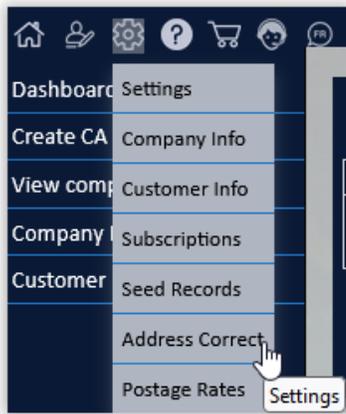
ABC Company

[Next Page >](#)

First Name	Last Name	Name1	Name2	Name3	Company Name	Address1	Address2	City	Prov	PC
Carolyn	Trebell					1-2 VATA CT		AURORA	ON	L4G 4B6

Address Correct:

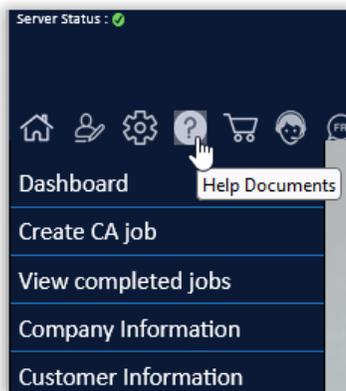
Type in an individual address and press Address Correction

A screenshot of the 'Address Correction' form. The title 'Address Correction' is at the top. Below it are five input fields labeled 'Address 1', 'Address 2', 'City', 'Province', and 'Postal Code'. At the bottom of the form is a blue button labeled 'Address Correction'.A screenshot of the 'Address Correction' form, similar to the previous one, but with pre-filled information. Above the input fields, there is a green message: 'address is valid / l'adresse est valide'. The input fields contain: '1-2 VATA COURT', 'AURORA', 'ON', and 'L4G 4B6'. A blue button labeled 'Address Correction' is at the bottom, with a mouse cursor pointing to it.

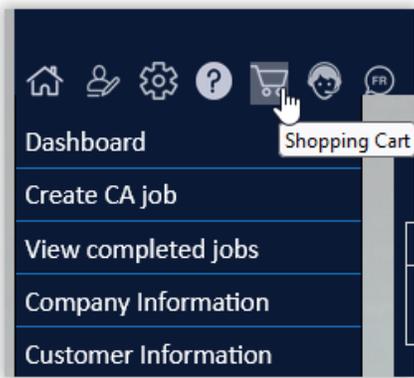
Help: This directs to our customer portal where the manuals, reference info and newsletters are found.

Please create an account on the portal <https://www.flagshipsoftware.com/fsweb/>

Select The Portal to register.



Shopping Cart:



NCOA transactions can be purchased from the website by selecting the shopping cart, or you can contact Flagship Software directly at ncoa@flagshipsoftware.com

You have 5 minutes to complete this form / Vous avez 5 minutes pour remplir ce formulaire

Country
Canada ▾

Province
▾

- ### NCOA Transactions*
- None
 - 1,000 Transactions for \$10
 - 2,500 Transactions for \$25
 - 5,000 Transactions for \$50
 - 10,000 Transactions for \$80
 - 25,000 Transactions for \$100
 - 50,000 Transactions for \$130
 - 100,000 Transactions for \$250

Extra Info

TERMS & CONDITIONS

- Transactions are valid for one year after purchase.
- One record processed = 1 transaction charged.
- User guide provided upon purchase.
- *Prices subject to change.
- Payment by Canadian Visa and Mastercard only. For other payment options, please contact Flagship Software Ltd. at 416-410-6357 or 1-866-672-0007.

Purchase Details:

- \$ 0 Transactions
- \$ 0 HST/GST (Tax rate = Missing province (Calc for PEI at 15%))
- \$ 0 Total

Credit card information



Remote Support:

A dark blue navigation bar with several white icons: a home icon, a person icon, a gear icon, a question mark icon, a shopping cart icon, a person icon, and a person icon with 'FR' next to it. Below the icons, the word 'Dashboard' is written in white. A mouse cursor is pointing at the person icon with 'FR', and a white tooltip box with the text 'Remote Support' is visible below it.

A dark blue dropdown menu with a white background. It contains two items: 'Training Request' and 'Remote Support', both in white text. The 'Remote Support' item is highlighted with a white background and a dark blue border.

Training: Complete the form and press submit:

Web Training / Support Request

Name

Email

Company Name

Phone Number

Training Request

Support Request

Extra information

Submit

Remote Support will take you to our website.

Just follow these instructions:



Remote Support



Getting Support is easy with Flagship Software Ltd.

Download (WIN)

Download (MAC)

Remote Support

Please fill the representative in the following ID to connect to your desktop.

Example

Your ID	Personal
123 456 789	Yes

Ready to connect? Not connected

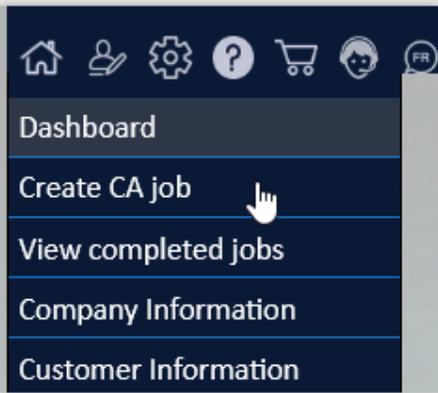
www.flagship.com

1. Download QuickSupport application to establish a connection.
2. Select Run. You will see the image below.
3. Give the representative the 9-digit ID in the "Your ID" section.
4. A technical support representative will connect to your computer and will remain connected while the application is open.

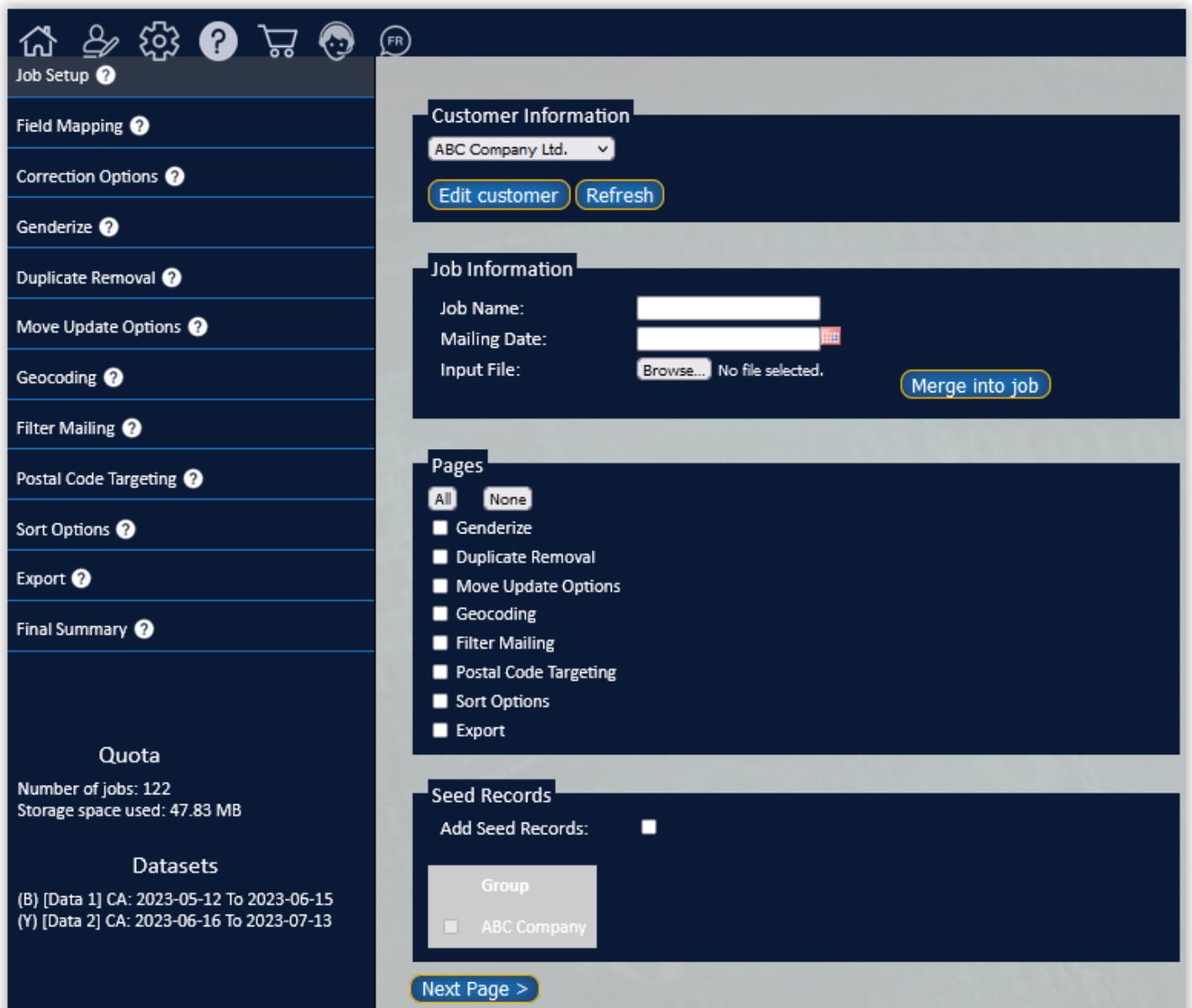


Toggle on/off for French or English

Creating a job:

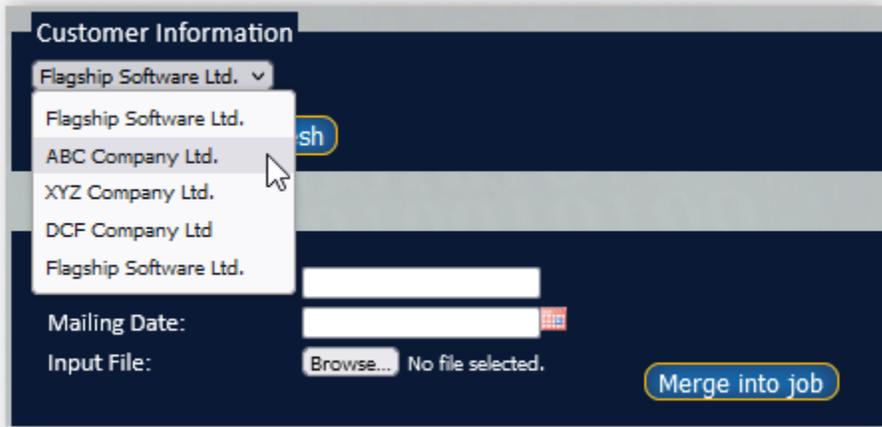


Job Setup view: (see below for job setup steps)

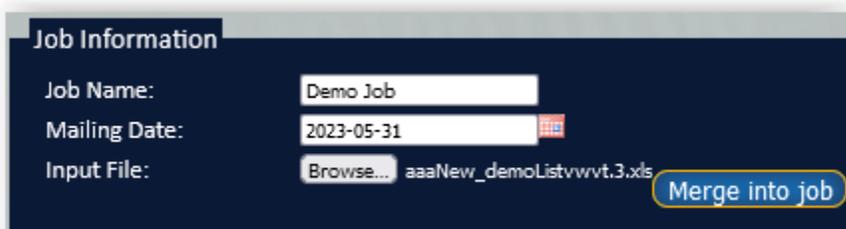


Select the customer whose job is being processed from the drop down menu:

If you are processing for your own company, this will be the first item on the list:



The screenshot shows the 'Customer Information' section of a software interface. At the top, there is a dropdown menu currently displaying 'Flagship Software Ltd.'. The dropdown menu is open, showing a list of options: 'Flagship Software Ltd.', 'ABC Company Ltd.', 'XYZ Company Ltd.', 'DCF Company Ltd.', and 'Flagship Software Ltd.'. A mouse cursor is hovering over the second 'Flagship Software Ltd.' option. Below the dropdown, there are input fields for 'Mailing Date' and 'Input File'. The 'Input File' field shows 'Browse...' and 'No file selected.'. A blue button labeled 'Merge into job' is located at the bottom right of the form.

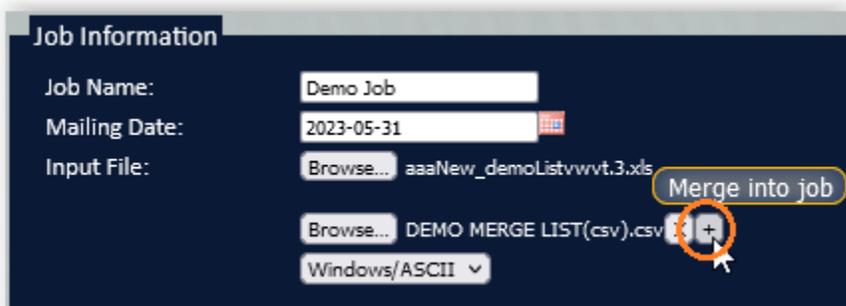


The screenshot shows the 'Job Information' section. The 'Job Name' field contains 'Demo Job'. The 'Mailing Date' field contains '2023-05-31'. The 'Input File' field shows 'Browse...' and 'aaaNew_demoListvrvvt.3.xls'. A blue button labeled 'Merge into job' is at the bottom right.

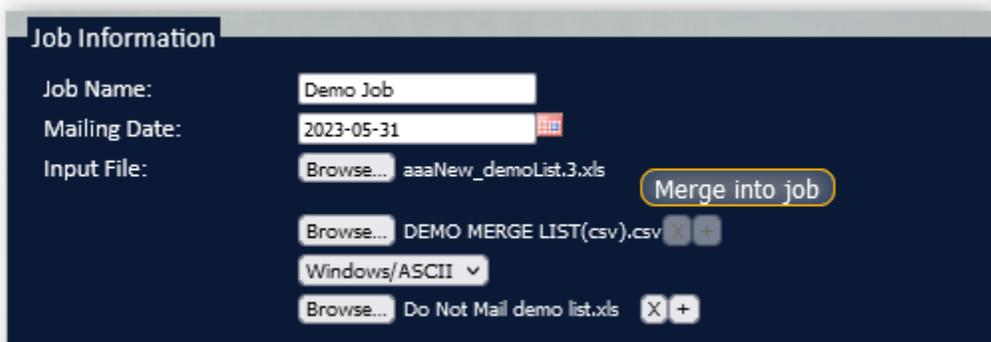
Name the job, choose the mailing date and load your file.

If you have more than one database, select the "Merge into job" to load another database.

Keep selecting "+" until you have merged all the required databases.



This screenshot shows the 'Job Information' form with two files listed under 'Input File'. The first file is 'aaaNew_demoListvrvvt.3.xls'. The second file is 'DEMO MERGE LIST(csv).csv'. A blue button labeled 'Merge into job' is at the bottom right. A red circle highlights a '+' icon next to the second file, with a mouse cursor pointing to it.

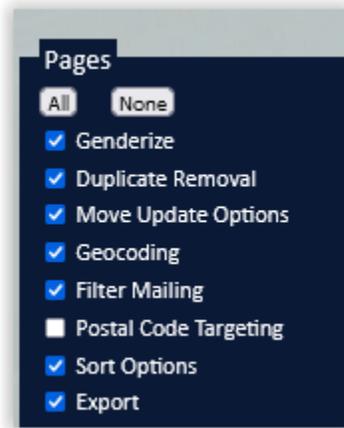


This screenshot shows the 'Job Information' form with three files listed under 'Input File'. The first file is 'aaaNew_demoList.3.xls'. The second file is 'DEMO MERGE LIST(csv).csv'. The third file is 'Do Not Mail demo list.xls'. A blue button labeled 'Merge into job' is at the bottom right. Each file entry has a small 'X' icon and a '+' icon next to it.

Pages:

Select the options as required, or press All

NOTE: Correction is processed by default



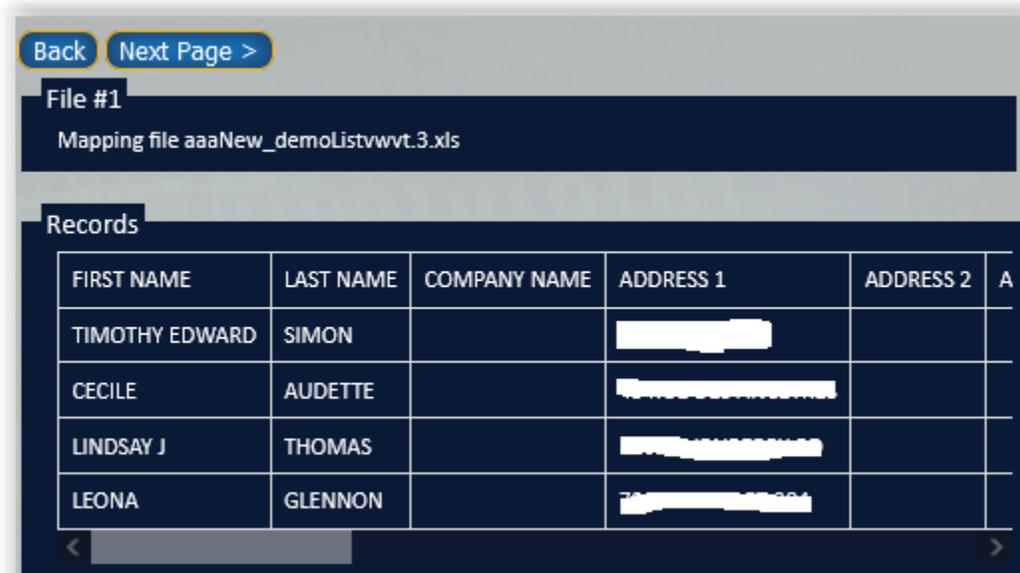
Seed Records:

Option to add seed records.



Database view: Option to use the scroll bar to see field mapping:

This will appear for each data file loaded:



Database Information:

Database information

Sheet: Customer List-5656 Records
Header Row: Yes No

[Revert to Import](#)

Name Field Mapping

First Name: FIRST NAME
Last Name: LAST NAME
Name 1:
Name 2:
Name 3:

This shows what sheet is being used if there are multiple sheets in your datafile:

Customer List-5656 Records
Customer List-5656 Records
Postal Code list-499 Records

Map the names using the drop down arrow. If you plan on processing duplicates, map the fields that will be used. Ex. Name fields. If names are combined, map in Name 1.

Address Field Mapping

Address 1: ADDRESS 1
Address 2: ADDRESS 2
City: CITY
Province: PROVINCE
Postal Code ^{CM}: POSTAL CODE

Separate Fields One Field City/Province One Field City/Province/PC

If your file has more than 2 address fields, select the + sign to merge fields

Address Field Mapping

Address 1: ADDRESS 1
Address 2: ADDRESS 2
City: CITY
Province: PROVINCE
Postal Code ^{CM}: POSTAL CODE

Separate Fields One Field City/Province One Field City/Province/PC

Language Field Mapping

Language: English Indicator: French Indicator:

Variable Weight/Thickness

Thickness (mm) Weight (g)

FIRST NAME
LAST NAME
COMPANY NAME
ADDRESS 1
ADDRESS 2
ADDRESS 3
CITY
PROVINCE
POSTAL CODE
CUSTOMER NUMBER
FIRST NAME DUP
LAST NAME DUP
LANGUAGE
DONATION

Address Field Mapping

Address 1: ADDRESS 1

Address 2: ADDRESS 2

Address 3: ADDRESS 3

City: CITY

Province: PROVINCE

Postal Code ^{DM}: POSTAL CODE

Separate Fields
 One Field City/Province
 One Field City/Province/PC

Three address fields are now mapped.

If your City Province PC are merged, select appropriate option

Language Field Mapping (Optional)

Language: LANGUAGE

English Indicator: E

French Indicator: F

If the file has a language field, there is the option to map it for correction. If mapped, the address will be corrected to the language indicated.

First Name: FIRST NAME

Last Name: LAST NAME

Name 1:

Name 2:

Name 3:

Address Field Mapping

Address 1:

Address 2:

City:

Province:

Postal Code ^{DM}:

Separate Fields
 One

Language Field Mapping

Language: LANGUAGE

English Indicator: E

French Indicator: F

If there are fields that contain variable weights and variable thicknesses, map these fields here. These values will be used for sort calculation.

Variable Weight/Thickness (Optional)

Thickness (mm): THICKNESS

Weight (g): WEIGHT

Select the language in which the reports are required.

Report Language

Report Language: English French

If there are multiple databases that will be used, click Next Page to map each database accordingly.

Select correction options as required:

NOTE: Click on the “?” for option for correction examples.

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Language Options

- Automatic
- All English
- All French
- Language By Province
- Language By Indicator

Address Content Formatting

- Machineable [?]
- Upper/Lower case
- Use Accents
- Western Style [?]
- Shorten Address [?]
- Update LVR [?]
- Update Valid [?]
- Minimum SERP Rural Standards [?]
- Space in Postal Code SM
- Mixed Case Address Components

Include name fields in address correction? [?]

Use imported city name / Utiliser le nom de la ville importée ^v

All English Example

23-4524 SAINT-LAURENT BLVD
MONTREAL, QC H2T 1R3

All French Example

23-4524 BOUL SAINT-LAURENT
MONTREAL, QC H2T 1R3

Address Line Formatting

- No Preference
- Prefer 2 Line
- Force 1 Line

Field Formatting

Ability to case additional fields in your database.

Advanced Field Formatting Options ?

Option to Genderize:

This will add a salutation to the selected field.

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Perform Genderize

Perform Genderize

Genderize Options

Column to Genderize:

Results column name:

Language Options

All English All French Automatic Based on Address

Prefixes

	English	French
Masculine	<input type="text" value="Mr."/>	<input type="text" value="M."/>
Feminine	<input type="text" value="Ms."/>	<input type="text" value="Mme."/>
Androgynous	<input type="text"/>	<input type="text"/>
No Match	<input type="text"/>	<input type="text"/>

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Duplicates:

If duplicate processing is required, tick Perform Duplicate Removal, and select the options required.

Example:

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Perform Duplicate Removal

Perform Duplicate Removal

Criteria

<input checked="" type="checkbox"/> Address 1	<input checked="" type="checkbox"/> First Name
<input checked="" type="checkbox"/> Address 2	<input checked="" type="checkbox"/> Last Name
<input type="checkbox"/> City	<input type="checkbox"/> Name 1
<input checked="" type="checkbox"/> Province	<input type="checkbox"/> Name 2
<input checked="" type="checkbox"/> Postal Code	<input type="checkbox"/> Name 3

Options

100 % Percent Match for Name Fields ?

Partial Names ?

Ignore Rural Address

Blank names are NOT duplicate ?

If you have added a suppression list, select it here: Select options as required, Example only:

Suppression File

Set a suppression file

3. Do Not Mail demo list.xls

Post-Processing

Delete the Duplicates from the mailing

Save Report

Export Just Duplicates

Export Duplicates and the Original

Advanced Options:

This will allow priorities to be set, as in the example below:

Advanced Options

Perform Advanced Options

Priorities

Length File Order Language Correct Or Valid Sequential Random

Up Down Remove

Fields Selected

FNAM ADD2 CITY PROV PC LNAM

Up Down Remove

Removed

Restore Unit Restore All

Fields Removed

Restore Unit Restore All

NCOA processing:

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Perform Move Updates

- Perform National Change Of Address Matching
 - Perform Do Not Mail Matching
 - Perform Enhanced Deceased Suppression Matching

Name Options

Separate Name Fields Combined Name Fields

First Name:

Middle Name:

Last Name:

Name Suffix:

Company Name:

Click on <https://www.canadapost.ca/ncoa> to obtain Terms of Use ID's.

Customer Information

Service Provider Terms of Use ID: [NCOA Mover Data](#)

Enter a service provider ID if you are not the end user. The end user is the last person in the chain that will be seeing the modified data. If you are the end user, simply enter your end user ID and leave the service provider ID blank.

Customer Name:

Customer End User Terms of Use ID:

Override End User Terms of Use ID?

NCOA Matching

Apply Matches Purge Nixies

Additional Move Update Services

Purge DNM Purge CDL

Match using address, first and last name

Match using address and last name only

Match using address only

Export Options

Export

Fields To Export

- NCOA Values
- Original Values
- Corrected Values

Types to Export

All Types

Just Nixies

Just Matches

Include DNM records in Export

Export Header Row

Surround Fields With Quotes

Specify Delimiter:

Export Type:

Save Report

Geocoding:

Geocoding will add location information to the data in your current job.

Select options as required.

Geocoding

Perform Geocoding

Geocoding Settings

How do you want the returned longitude and latitude to be displayed?

Signed Degrees (e.g. 40.7486, -73.9864)

Unsigned Degrees (e.g. 40°44'55"N, 73°59'11"W)

Each address in your database can be compared to a list of postal codes. The closest postal code to the ones on the list will be reported.

Enter your postal codes in the textbox below separated by a comma :

Ex: H0H0H0,H1H1H1

OR

Upload a file containing postal codes you intend to use geocoding :

No file selected.

Geocode Filtering

Filter By Distance

Filter out any addresses that are either too far or too close to the closest postal code from your list, or both.

Closer than: Km

Farther than: Km

Filter By Pieces

Keep a number of the pieces closest or farthest to your list of postal codes to create a standard size mailing list of your best possible clients.

Closest

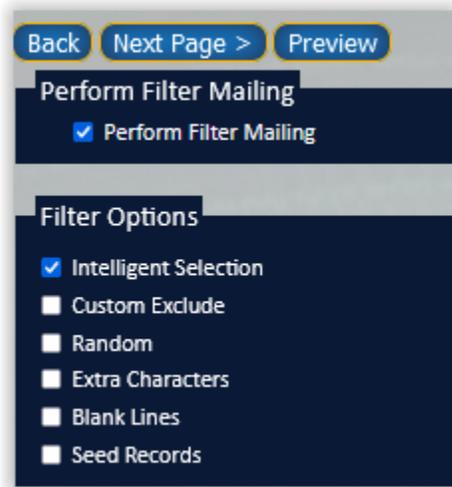
Farthest

Filter Addresses that could not be Geo-Coded.

Perform Filter Mailing:

This will exclude records from the mailing based on the selected options below:

NOTE: Filtering records permanently changes your job.



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Perform Filter Mailing

Perform Filter Mailing

Filter Options

Intelligent Selection

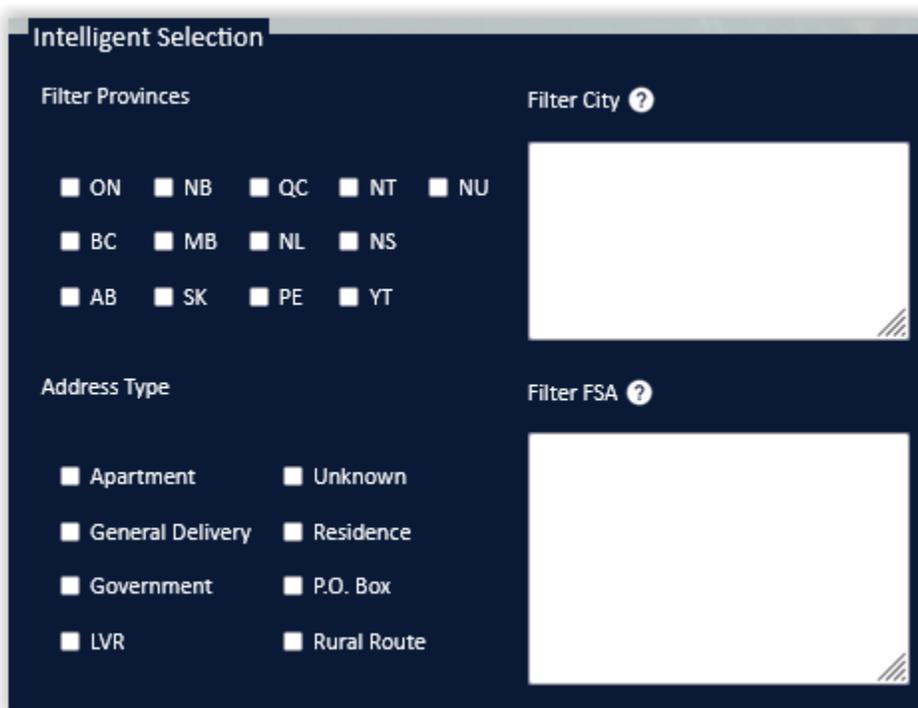
Custom Exclude

Random

Extra Characters

Blank Lines

Seed Records



Intelligent Selection

Filter Provinces

ON NB QC NT NU

BC MB NL NS

AB SK PE YT

Address Type

Apartment Unknown

General Delivery Residence

Government P.O. Box

LVR Rural Route

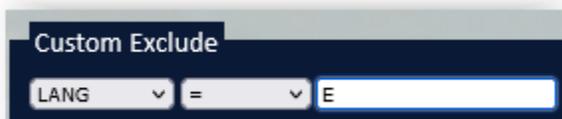
Filter City ?

Filter FSA ?

Intelligent Selection:

Allows you to select your mailing by removing Provinces, Cities, Address Types and/or FSA^{OMs}.

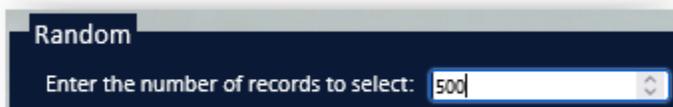
Custom Exclude: An advanced custom filter that allows you to filter based on fields in your database.



Custom Exclude

LANG = E

Random: Allows you to choose a random mailing from within your database.



Random

Enter the number of records to select: 500

Extra Characters: Removes symbols and other characters that represent commands in certain database formats. These symbols and characters can impact printing of files later.

Extra Characters

Tab Line Feed Form Feed Windows new line Carriage Return

Blank Lines: Removes records with blank lines in fields as selected.

Blank Lines

Remove Records where the following fields are blank

Address 1 Address 2 City Province Postal Code™

Seed Records

Filter Seed Records

Removes seed records from the database.

Sortation:

The Sort function performs presort processing on your job, grouping mail by postal code and placing mail into containers and/or bundles as required, to take advantage of discounted postage rates.

Select options based on your sort requirements, as in the examples below:

Perform Sort

Perform Sort

Address Included in Sort

Uncorrectable
 Retired Postal Code
 Questionable
 Uncoded As Residue

Mailing Options

Split large bundles (S/L > 100mm and O/S > 200mm)
 Use phantom pieces if necessary

Sort Type

- Personalized Mail (Special Handling)
- Personalized Mail Machineable
- Publications Mail (Special Handling)
- Publications Delivery Facility Presort
- Publications Mail Machineable
- Incentive Lettermail Machineable

Select the type of mail to be sorted.

Piece Size

- Standard
- Oversized
- Dimensional
- Piece is Rigid

Variable Weight/Thickness

Piece Dimensions (* = required)

Thickness:* mm

Weight:* g

Length: ? mm

Height: ? mm

Max # of pieces in a bundle:

Max # of pieces in a container:

Override Max bundle/container #:

Calculate

Complete based on the sort type.

Thickness:* mm

Weight:* g

Length: ? mm

Height: ? mm

Max # of pieces in a bundle:

Max # of pieces in a container:

Override Max bundle/container #:

Calculate

Example.

Press Calculate to see the bundle and container information.

Select required options:

The screenshot shows three sections of a dark-themed interface. The first section, 'Container Type', has a radio button selected for 'Letterflatainer - LFT' and another for 'Flat Tub'. The second section, 'Pallet Option', has a radio button selected for 'None' and others for 'Pallet' and 'Monotainer'. The third section, 'Brick Piling', has four checkboxes, all of which are currently unchecked: 'Brick Pile', 'Residue (Special Permission is required)', 'Level 3 (DCF)', and 'Level 4 (FCP)'.

The screenshot shows the 'Settings' section of a dark-themed interface. It contains several input fields: 'Customer Number' with the value '7654321' and a 'Find a Deposit Location' link; 'Office Of Deposit' with a 'List' button; 'City-Prov:', 'Postal Code:', and 'Site Number' each with an empty text input field; 'Tax Rate' with the value '0.0'; and 'Override Warnings' with an unchecked checkbox.

If this was not already set up in your default profile, choose the Office of Deposit and enter the tax rate.

The screenshot shows the 'Specify Pallet Details' section of a dark-themed interface. It features a button labeled 'Calculate Pallet Details' which is highlighted with a yellow border and a mouse cursor pointing to it.

Press if Pallets has been selected.

The screenshot shows the 'Export' section of a dark-themed interface. It has a checked checkbox for 'Perform Export'. Below it is the 'Export Type' section, which includes a 'File Type' dropdown menu currently set to 'Excel 2007 (.xlsx)'.

Choose the Export type from the drop-down menu.

Select your export options:

Columns

- Extra Control Fields
- Add Original Address Field
- Include all fields from the original Database
- Add leading zeros to ListOrder
- Add Address Components
- Add Status and Comments
- Add Correction Fields

Records

- Corrected
- Valid
- Uncorrectable
- Uncoded
- Foreign
- Only Sorted Records

Order

- Export in Sort Order
- Export in Original Order
- Export in Reverse Sort Order
- Unsorted Records at the End

Mailing Summary

Example only – full job options not shown here:

Mailing Summary

Job Setup

Job Name: Demo Job
Mailing Date: 2023-05-31
Filename 1: aaaNew_demoList.3.xls
Group Records: ABC Company

Field Mapping File 1

Tablename: Customer List
Header Row: Y
First Name: FIRST NAME
Last Name: LAST NAME
Address 1: ADDRESS 1
Address 2: ADDRESS 2, ADDRESS 3
City: CITY
Province: PROVINCE
PC: POSTAL CODE
One Field: separate
Language Field: LANGUAGE
Indicator E: E
Indicator F: F
Report Lang: 1
Delimiter Export: Excel 5.0

Correction Options

Line Formatting: NoPreference
Upper Lower Case: N
Use Accents: N
Western Style: N
Shorten Address: N
Update LVRs: N
Update Valid: N
Minimum SERP Rural Standards: N
Space in Postal Code^{cm}: Y
Mixed Case Address Component: N
City Field Length: imported
Language: Automatic

Sort Options

Sort Type: PERSONALIZED_SPECIAL_HANDLING
Split Bundles: Y
Phantom: false
Piece Size: Standard
Piece Height: 100
Piece Length: 140
Variable Weight/Thickness: N
Piece Thickness: 1
Piece Weight: 15
Container Type: LETTERFLATAINER
Customer Number: 7654321
OOD CityProv: MISSISSAUGA ON
OOD Postal Code: L4W1S2
OOD Site Number: I029
Tax Rate: 13.0
Uncorrectable: Y
Retired Postal Code: Y
Questionable: Y
Uncoded As Residue: N
Residue: N
Level 3: N
Level 4: N

Export Settings

File Type: Excel 2007X
Extra Control Fields: N
Add Original Address Field: Y
Include all fields from the original Database: Y
Add Leading zeros to ListOrder: N
Add Address Components: N
Add Status and Comments: Y
Add Correction Fields: Y
Uncoded: N
Foreign: N
Corrected: Y
Valid: Y
Uncorrectable: Y
Only Sorted Records: N
Order Type: sort
Unsorted Records at the End: N

When the record count is verified and the submit button is pressed, you will be directed to the Job Listing page where you will see the status of your submitted job(s).

Summary verification

Record Count: 5656 Verified expected record count

Submit 

Jobs Listing

	Job Name	Customer Name	Wizard State	Job Start Time	Time of Job Completion
	Demo Job	ABC Company Ltd.	Complete	2023-05-30 12:21:02	Working...

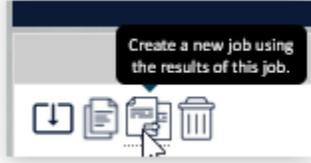
Once the job is processed, there will be the option to download the job and all associated databases and reports:

Jobs Listing

Download results of this job.	Job Name	Customer Name	Wizard State	Job Start Time	Time of Job Completion
   	Demo Job	ABC Company Ltd.	Complete	2023-05-31 12:49:34	2023-05-31 12:51:36



Option to create a new job using the parameters of this job.



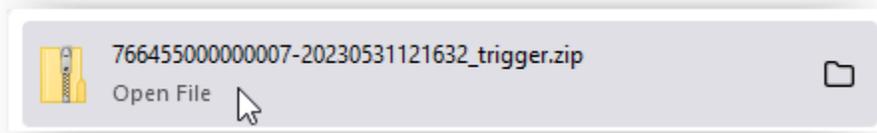
Option to create a new job using the results of this job.



Option to delete the job to free up storage space on the server.

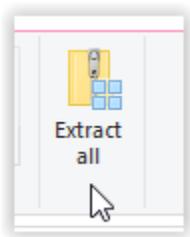
Downloading the job:

Open the zipped file and save to your computer.



Example of files and reports:

Name	Type
76645500000007-20230531121632c...	Text Document
Demo Jobcontainer.pdf	Adobe Acrobat Document
Demo JobContainerReport.txt	Text Document
Demo JobCorrectedReport.txt	Text Document
Demo Jobexport.xlsx	Microsoft Excel Worksheet
Demo JobmailingPlan.zip	Compressed (zipped) Fol...
Demo JobS_Mailing.pdf	Adobe Acrobat Document
Demo JobS_Mailing.txt	Text Document
Demo JobUncorrectableReport.txt	Text Document
Demo JobV_Summary.txt	Text Document
Demo JobValidationReport.txt	Text Document



Your job is done!

For technical assistance, please contact support@flagshipsoftware.com or 1-866-672-0007, x 300

For training, please contact sales@flagshipsoftware.com or 1-866-672-0007, x 101.

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