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Global Mail PostKIT

**The dispatch software for
international registered items**

Version 1.0



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1 Installation

1.1 General

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1.2 Technical requirements

Computer system

PC, at least with Intel Pentium processor or comparable. Pentium II recommended.

Graphic resolution: at least 800x600, high colour

At least 32 MB working memory; 64 MB recommended

100 MB spare hard drive capacity for programs and data

Operating system and software

- Microsoft Windows XP®
- Microsoft Windows NT4®, SP6
- Microsoft Windows 2000®

Additional requirements:

- **Adobe Acrobat Reader®** from version 5.0.5
You can download the software free of charge from www.adobe.de.

Printer

All Windows-compatible system printers. However, laser printers are recommended as the barcodes require a high-quality resolution.

Requirements for using online services

You need Internet access to use the optional online services.

- Supported Internet accesses types:
- Local network (LAN)
- Data transfer network via telephone dial-up
- T-Online®
- AOL®.

You need an Internet browser to directly call up (optionally) HTML pages containing information on the shipment's status.

Supported **Internet browser**:

- Microsoft Internet Explorer 5.5® or higher.

User rights

To install Global Mail PostKIT, you must be logged in as a user with administrator rights.

1.3 The installation wizard

To start the installation process, proceed as follows:

1. Select the file required for your language selection.
2. Download the file Setup.exe to a temporary directory on your PC, e.g. c:\temp.
3. Install Acrobat Reader 5.0.5 or higher if you don't have it already.
4. Start the installation by executing the file Setup.exe.

NB: If you have forgotten to install Acrobat Reader before you install Global Mail PostKIT, you will be notified of this fact during the installation of Global Mail PostKIT. After that, you will be able to continue with the installation anyway. After you have installed Global Mail PostKIT, you must then execute the file called "PkInstallerPrinter.exe" in the installation folder (e.g.: C:\Programme\Global Mail PostKIT\). This registers Acrobat Reader for use within Global Mail PostKIT.

To simplify the installation process for you, the installation wizard will assist you throughout the installation process.

In the welcome dialogue, you will be asked to specify your home country. This information will enable you to control the format of your date entries in Global Mail PostKIT, for example. After you have selected a country, click on "Next" in the welcome dialogue to continue the installation process.

If you click on "Cancel", you will close the installation wizard and end the installation process.



General licensing conditions

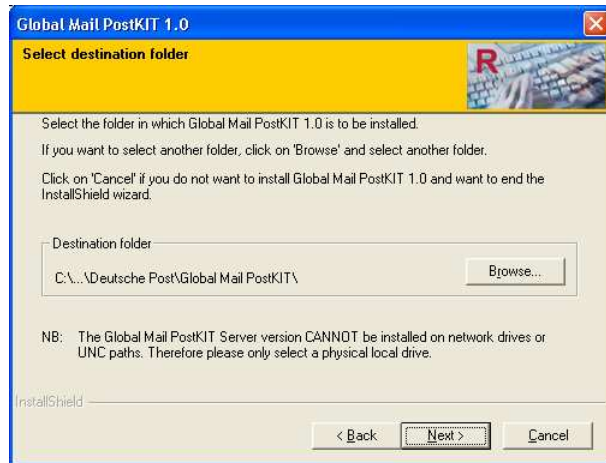
Please read the general licensing conditions carefully. If you accept them, select the option "I accept the licence agreement" in order to continue the installation process. If you select the "I do not accept the licence agreement" option, you can only cancel the process or return to the previous window.

Click on "Next" to continue the installation process.

Destination folder

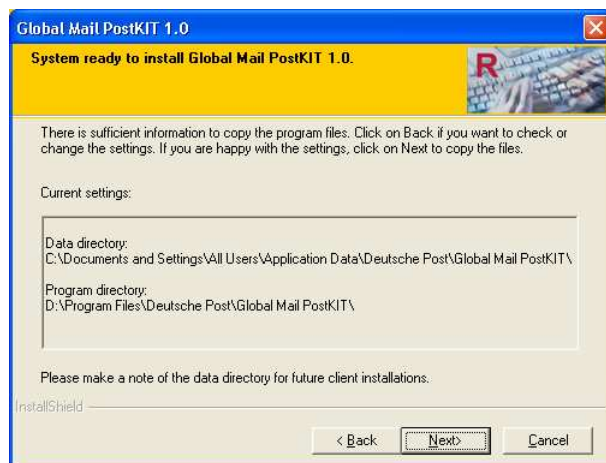
In this dialogue, you can specify the directory in which you want to install Global Mail PostKIT. The program will suggest the C:\Programme\Global Mail PostKIT\ folder. If you want to use a different destination folder, you can select it by clicking on the “Browse” button. Click on “Next” once you have specified the destination folder.

NB: It is best to use a brand new directory for the installation.



Starting the installation

After you have specified all the required information, start the installation by clicking on “Next”. All of the important settings will be displayed again for you.



Finish Global Mail PostKIT

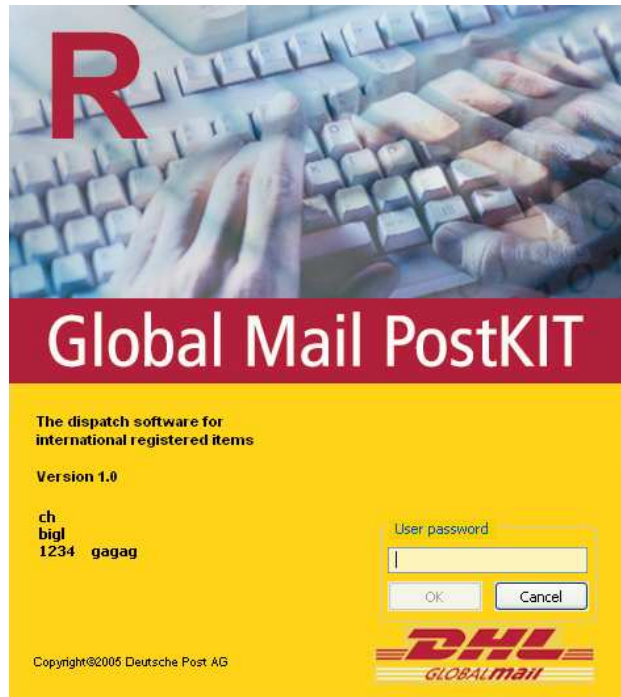
Click on the “Finish” button to complete the installation fully.



1.4 Calling up Global Mail PostKIT

You can now start Global Mail PostKIT right away, by either double-clicking on the Global Mail PostKIT icon on your desktop or by selecting Global Mail PostKIT in the Start menu.

If you assign a user password later on in the configuration, next time you call the application up you will be asked to enter and confirm your user password before you can use the application.



1.5 Data backup

The data stored in Global Mail PostKIT (addresses, shipments, etc.) is stored in what is called a data directory. The data directory is displayed during the installation process. Please make a note of this directory and back it up regularly to ensure you do not lose any data. The data directory is dependent on the installed operating system. In Windows XP and Windows 2000, the path is generally “C:\Documents and Settings\All Users\Application Data\Deutsche Post\Global Mail PostKIT\”, while in Windows NT it is usually “C:\<WINDOWS Folders>\Profiles\All Users\Application Data\Deutsche Post\Global Mail PostKIT\”. <WINDOWS Folders> denotes the name of the folder which contains files for organising Windows. This can vary (“Windows”, “WINNT”, etc.). In some operating systems, you can determine the directory where the path “\Application Data\Deutsche Post\Global Mail PostKIT\” should be located, as follows:

- Open a command line window (Start → Run → Enter “cmd” → OK)
- Execute the command “echo%ALLUSERSPROFILE%” by entering it on the keyboard and then confirming it by pressing the Enter key. In older operating systems, the command may be “echo %ALLUSERS%”.
- The path you are looking for will be displayed.

If you have to set the system up again because of a fault, please firstly install Global Mail PostKIT as described above. Then replace the content of the Global Mail PostKIT data directory with the backed up files. In the event of problems, please contact the Global Mail PostKIT hotline. You can find the contact details for it in the “Contact” section.

2 Internet wizard

If you want to set up an Internet connection to Deutsche Post's server, use the Internet wizard, which will help you to configure your connection.

You need an Internet connection if you want to register online or find out the status of a shipment.

The Internet wizard is called up automatically the first time you start Global Mail PostKIT after installing it. You can make settings and changes later on in the Global Mail PostKIT application in the *Master data* → *Internet settings* menu.

A welcome dialogue will appear first of all. Click on "Next" to move from one setting to the next. If you make a mistake, you can go back to the previous screen by clicking on "Back". If you click on "Cancel", the wizard will close without saving any data.

Follow the instructions given by the Internet wizard.

2.1 Selecting the Internet access

Select the type of Internet access you want here. You can choose between the connection types set up on your system.

Data transfer network

A requirement for this is the setup of data transfer connections in Windows network connections. Select the data transfer connection which Global Mail PostKIT should use for the connection setup.

Local network

If you are connected to a local network with access to the Internet, select this setting.

T-Online, AOL

These access types are only available if the provider software is already installed on your system.

Manual connection

If you do not want Global Mail PostKIT to set up a connection to the Internet automatically for online functions, choose this option. You will then have to set up the Internet connection manually each time before you can use the online functions.

No connection/offline operation

If you do not want to set up an Internet connection to Deutsche Post, select the "No connection" option. The online functions will not be available to you then.

2.2 Proxy settings

Enter the proxy server information which is valid for your network environment here. If required, ask your system or network administrator about this.

2.3 Test connection

After you have entered all your information, you can check whether the connection to Deutsche Post can be established. If the connection test fails, you can change your settings by clicking on "Back".

If the connection test succeeds, close the Internet wizard by clicking on "Finish".

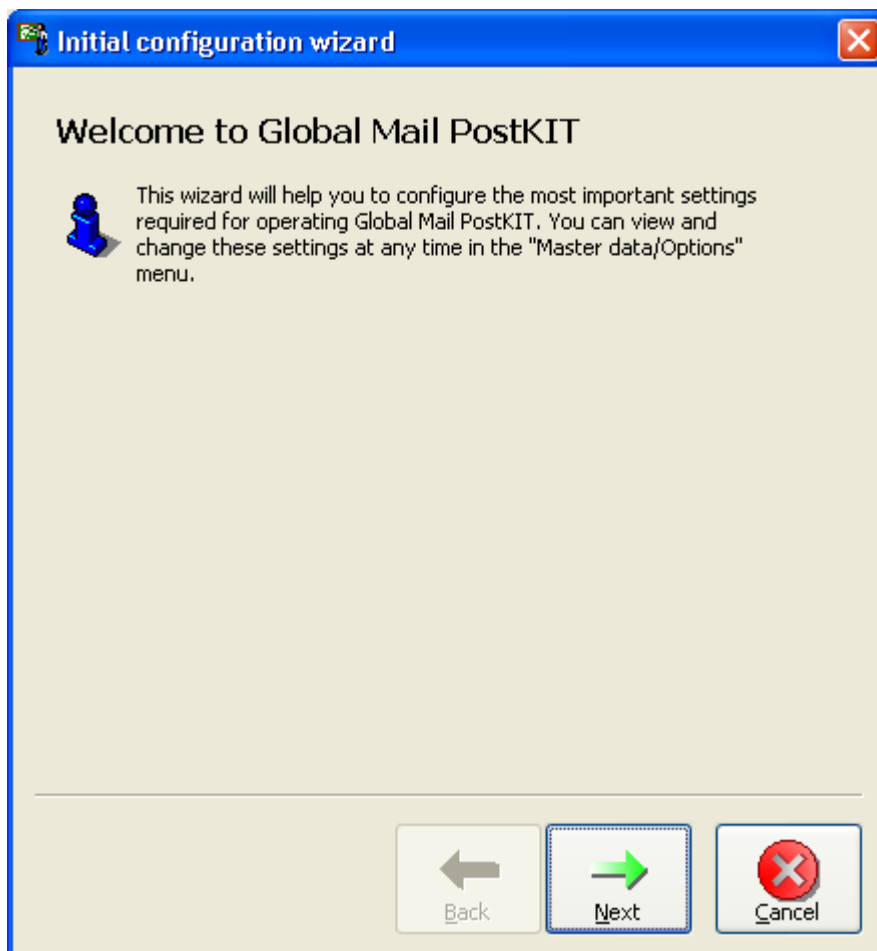
3 Initial configuration wizard

To be able to register and serve you as a Global Mail PostKIT customer, Deutsche Post requires some data from you. The Global Mail PostKIT software has an initial configuration wizard for this purpose, which can help you to configure the basic settings for handling Global Mail PostKIT. The initial configuration wizard is called up automatically the first time you start Global Mail PostKIT after installing it, and after the Internet wizard has been closed.

If basic settings have to be changed during day-to-day work, these changes can be made subsequently in the *Master data* → *Options* menu.

Welcome dialogue of the initial configuration wizard

A welcome dialogue will appear first of all. Click on “Next” to move from one setting to the next. If you make a mistake, you can go back to the previous screen by clicking on “Back”. If you click on “Cancel”, the wizard will close without saving any data.



3.1 Entering master data

The master address is the sender address which, as standard, is printed on all labels and lists as the sender. If you process shipments as a service provider for various clients, you can post the shipments in the client's name. Please refer to the management

Please enter the data as you wish. You can move the cursor from one field to the next using the TAB key. However, by clicking the mouse, you can position the cursor in the field where you want to make an entry.

NB: Fields highlighted in yellow are mandatory fields and must be filled in. After the data has been entered, these fields turn white. Blank white fields are optional fields and do not have to be filled in.

The "Next" button, which takes you to the next dialogue, is not activated until all mandatory fields have been filled in.

You can change the information on your personal identification and bank details at a later time in the client management of Global Mail PostKIT.

Customer number, telephone, e-mail address of the master

If you are already a business customer of Deutsche Post, you **must enter your ten-digit customer number** here. If you are not a business customer of Deutsche Post, you will receive your personal customer number when you register.

The e-mail address and customer number are checked to ensure their format is valid. Invalid entries are highlighted in yellow.

If all entries are valid, the "Next" button will take you to the next dialogue.

Bank details of the master

If you want to print international inpayment money orders for international cash on delivery shipments using Global Mail PostKIT, please enter your bank details here. Please use the valid IBAN and BIC codes (you can find them on your account statement). Please note that a German bank account is required in order to be able to use the cash on delivery special service.

The “Next” button will take you to the next dialogue.

Initial configuration wizard

Bank details

Please enter the bank details for the master address so that your cash on delivery shipments can be prepared correctly.

Account holder

Account no./IBAN

Bank name/BIC

Back Next Cancel

3.2 Defining the default sender address

Here, you can specify which address should be used as the default sender address for shipment preparation. To do so, select the desired option by clicking on it. You can change this setting at a later time in the Global Mail PostKIT options.

NB: If you have selected the “Last address used” option, you must always select the first address when you restart Global Mail PostKIT.

The “Next” button will submit the selected option and take you to the next dialogue.

Initial configuration wizard

Default address

Which address should be entered as the default in the sender address fields in shipment preparation?

Last address used

Enter address data each time

Back Next Cancel

3.3 Defining automatic shipment numbering

By default, once you have entered the first shipment number, all further shipment numbers will automatically be generated consecutively. If you do not want to use this automatic shipment numbering system, remove the tick from the checkbox. If you do so, then you must enter a valid shipment number manually for each shipment in shipment preparation. You can reactivate the automatic shipment numbering system at any time in the Global Mail PostKIT options.

NB: After you restart Global Mail PostKIT, you must always select the first shipment number.

Click on “Next” to reach the next dialogue.

Initial configuration wizard

Automatic shipment numbering

It is only necessary to enter the first shipment manually with the “Automatic shipment numbering” setting. It is only necessary to confirm all additional shipments by clicking on the OK button.

Automatic shipment numbering

Back Next Cancel



3.4 Assign an administrator password

Here, you have the option of assigning an administrator password in order to protect administrative Global Mail PostKIT functionalities, such as changes to the options or adjustments to the Internet settings, against unauthorised access. For more details, please read the information in the dialogue window.

If you want to set an administrator password, enter the password and repeat it in the second field. If you do not specify an administrator password, please note that all users will have access to administrative functionalities without being verified. In this case, you must confirm the security prompt in order to reach the next dialogue.

You can enter or change the administrator password at a later time in the Global Mail PostKIT options.

3.5 Assign a user password

Here, you have the option of assigning a user password to protect the application from unauthorised access. For more details, please read the information in the dialogue window. If you do not want to assign a user password, you can click on “Next” directly. Otherwise, enter your own password under “Password” and repeat it in the “Confirm password” field.

You can enter or change the user password at a later time in the Global Mail PostKIT options.

Click on “Next” to reach the next dialogue.

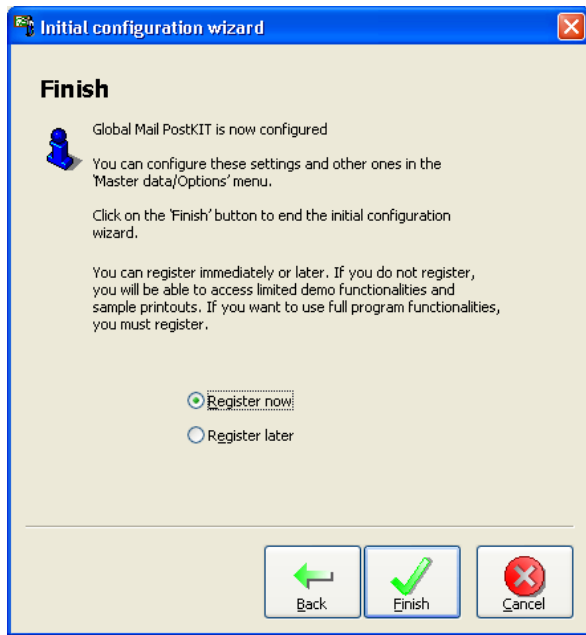


Opening dialogue for registration

The Global Mail PostKIT you have installed has now been configured. Now you have the option of either registering immediately or registering later.

If you decide to register later, select the “Register later” option and click on “Finish”. Only limited demo functionalities will be available to you now, however. By activating the “Finish” button, you will end the initial configuration wizard and can start using the application right away.

Select “Register now” if you want to register immediately. Click “Finish” to reach the registration window.



4 Register Global Mail PostKIT

Your master data will already be entered automatically in the registration screen. Please complete or correct the information if required.

Use TAB to move the cursor from one field to the next. You can also position the cursor by clicking the mouse. Fields highlighted in yellow are mandatory fields and must be filled in. After the data has been entered, these fields turn white. Blank white fields are optional fields and do not have to be filled in.

If you are already a business customer who is registered for using the online services of the special mail services area in www.deutschepost.de, please enter the ID that you use for logging into online services in the **username** field.

Once you have filled in the mandatory fields, the “Print application” button will become active.

If you have set up an Internet connection to Deutsche Post in the Internet wizard, you can register online by clicking on the “Online” button. Your registration will then be transferred to Deutsche Post via the Internet connection. If you wish, you can print out your registration application for your records.

If you have not set up an Internet connection in the Internet wizard, you must print the registration application and send it to the address specified on it. To do so, click on the “Print application” button.

To cancel the procedure, click on “Cancel”. Data which you have entered already will not be saved.

If you decide to register later, you can call up the registration dialogue later on using the *Applications* → *Register Global Mail PostKIT* menu.

The screenshot shows a registration form titled "Register Global Mail PostKIT". It includes a header with an information icon and a note: "Please give all the necessary details for the registration. Be sure to give your DHL Global Mail customer number (unique customer product number - EKP Number) as well as your e-mail address." The form is divided into two main sections: "Company" and "Contact". The "Company" section has fields for Name (highlighted in yellow), Street/house no. (highlighted in yellow), Postcode/city (highlighted in yellow), State (highlighted in yellow), Country (dropdown menu showing CA and CANADA), and Customer number. The "Contact" section has fields for Name, Title, First name, E-mail, Telephone, and Username. Below these sections is a "Monthly shipment volume (estimated)" field with a dropdown menu set to "1". At the bottom of the dialog, there are three buttons: "Print application", "Register online", and "Close".

The response

Once you have registered successfully, Deutsche Post will send you a reply by post.

Enter the data from this reply in the fields of the activation dialogue, which you can reach via the *Applications* → *Activate Global Mail PostKIT* menu.

Creating a new registration request

If you change your registration data after you have completed a registration application, you can transmit or print out the registration application again provided you have **not** yet activated Global Mail PostKIT.

If you select “Yes” when the security prompt appears, the old registration application will be invalidated. If you select “No”, a new registration application will not be transmitted or printed.

NB: If you receive a response to your registration application but have created a corrected registration application in the meantime, Global Mail PostKIT will not accept the information from the response. You must wait

for the information in the response belonging to your last registration application.

5 Activate Global Mail PostKIT

Once you have received the letter containing Deutsche Post's response, you can activate Global Mail PostKIT in order to use the full functionality of Global Mail PostKIT.

Start Global Mail PostKIT and open the activation dialogue via the *Applications* → *Activate Global Mail PostKIT* menu.

Then the dialogue will appear for entering the activation code. Now enter the reference number, customer number, username and password that are specified in your letter and then repeat the password. If you want to save the password for future use, select the "Save password" box. Now enter the activation code in the four fields in the "Activation code" field. Once you have entered all your information, the "OK" button will be activated.

NB: The username and password which you receive on registration are required for online queries. However, you must always enter these values, even if you do not want to use the online functionality at first. With this username, you can also access the information pages for business customers on www.deutschepost.de, independently of Global Mail PostKIT.

NB: Do not confuse the username and password with the administrator or user password which prevent unauthorised access to Global Mail PostKIT functionalities.


Click on the "OK" button to confirm the activation. If the entries are valid, Global Mail PostKIT will be activated for you and you will receive a message to this effect.

NB: The activation code consists of the numbers 0 to 9 and the letters A to F. When you type it in, make sure you do not confuse the number "0" with the letter "O".

Click on "Cancel" to cancel the activation procedure. The data you have entered will not be saved.

6 Shipment preparation

All shipments are recorded for dispatch within shipment preparation.

You can call up the shipment preparation screen using the shipment preparation button  in the tool bar, or via the *Shipments* → *Shipment preparation* menu or by pressing the F2 key.

NB: Fields highlighted in yellow are mandatory fields and must be filled in. After the data has been entered, these fields turn white. Blank white fields are optional fields and do not have to be filled in.

If you want to reject all of the information on a shipment, you can reset the shipment preparation screen without saving your data by clicking on “Delete”. Information on the sender, addressee and shipment reference will be deleted.

6.1 Select client

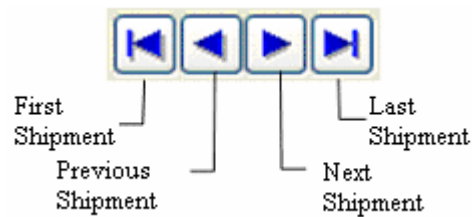
If you work with clients, you can select the client which you want to prepare shipments for here. The completed shipments will be assigned to this client so that they can be managed separately for the client at a later time.

If you want to assign the shipments to a different client, select the desired client from the list. To create a new client, you must go to the client management area using the *Master data* → *Clients...* menu.

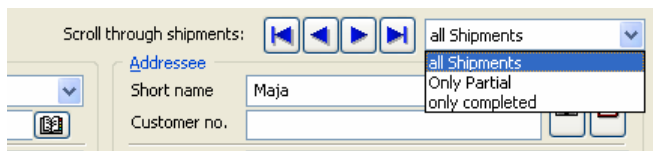
NB: If you do not work with clients, the name of your company will be shown here, like in your information when you set up Global Mail PostKIT; a selection is not possible.

6.2 Scroll through shipments

You have the option of scrolling through the prepared shipments using the navigation bar in the header of the shipment preparation screen.




In the selection list located to the right of the navigation bar, you can also choose which shipments you want to scroll through. For example, you can easily reach postponed shipments and complete them. Postponing shipments is described in more detail below.



6.3 Enter the sender address

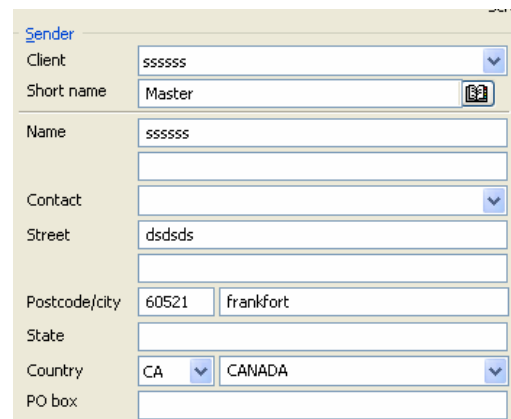
If you are preparing a shipment and, in the options, have indicated that you want to use the last address used, the sender address from the previous shipment will remain in the screen. If you have not selected this option, you must enter the sender address again for each new shipment.

If you want to specify a sender address which is already saved in address management, you can select and submit it by clicking on the address book icon . The address selection dialogue is described in the Search for and select addresses section.


If you enter a sender address which is not yet stored in the address book and you want to save it for later use, click in the “Short name” text field and enter an abbreviated name. When you fill in the short name in the address entry area, the sender address will be saved in address management as soon as you click on “Finish”. (For a more detailed description of address management, please refer to the Address management section.) If you leave the short name blank, the sender address will only be used for the current shipment and will not be saved.

In the “Country” field, you can enter either the country code or the country name or select it directly using the mouse. If there is no country code, for example because the country has only been established very recently, you can enter the new country on the keyboard in the field which contains the country name. The code field will stay blank in this case.

You can find a detailed description of the options for searching for and selecting addresses in the Search for and select addresses section in the address management section.



6.4 Enter an addressee address

Select an addressee address from address management by clicking on the address book icon . If you have entered other information in the addressee area before, the existing addressee addresses will be filtered using this information, like a search. You can find further search criteria in the “Filter” dialogue which is reached via the “Select addresses” dialogue. You can search for a group in particular there (see Select multiple addressee addresses).

When you enter a new address and fill in the short name or the customer number, the addressee address will be saved in address management as soon as you click on “Finish”. If you leave the short name and the customer number blank, the addressee address will only be used for the current shipment and will not be saved.

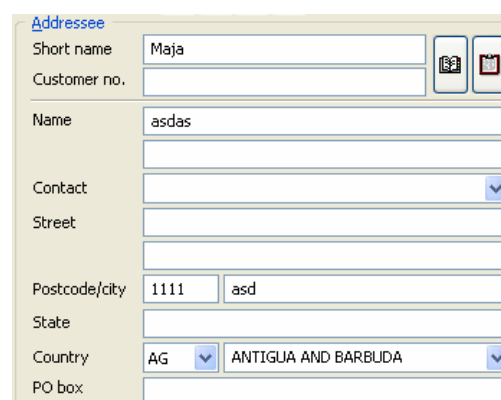
In the “Country” field, you can enter either the country code or the country name or select it directly using the mouse. If there is no country code, for example because the country has only been established very recently, you can enter the new country on the keyboard in the field which contains the country name. The code field will stay blank in this case.

You can move between the individual entry fields using the tab key. In the options that you can reach via the *Master data* → *Options* menu, you can define which fields to skip when you are navigating with the tab key. This enables you to make entries quickly using the keyboard, as you only move to the fields you actually require. However, you can go to the skipped fields at any time by clicking in them with the mouse.

If you have selected Germany as the country, Global Mail PostKIT will assist you in the postcode and city fields by automatically adding the city for the postcode. If you enter the full postcode or part of it in the relevant field and then move to the city field using the mouse or keyboard, the known information will be added automatically. However, if you only enter part of the postcode, you can only miss out the final digits. If the full postcode is, for example, “12345”, you can enter “1234” or “123” and will probably receive a lot of hits (all cities whose postcode starts with the specified digits). However, you cannot enter “2345” or “345”. Global Mail PostKIT would then search for all cities whose postcode started with “2345”. If there are several cities for a postcode, a small selection list will appear in which you can submit the right city in

the shipment preparation dialogue by double-clicking on the city in question or by selecting it and then clicking “OK”. However, you can enter the city by hand in the usual way. This will be the case if no information on a postcode is found or it is out-of-date.


You can find further information on searching for and selecting addresses in the Search for and select addresses section in the address management section.



Address copying (from customers' letters)

Another option for submitting addresses directly in shipment preparation and hence in address management too is to copy the address from a letter to the customer.

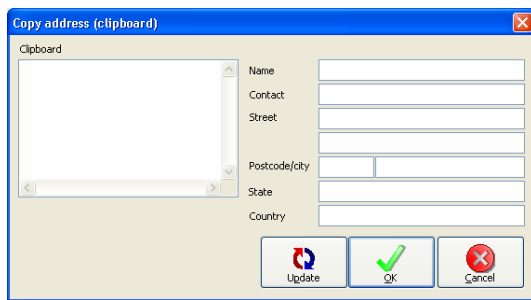
For example: You have written a letter to the customer and want to prepare it for posting directly.

- Copy the customer's address from the letter onto the clipboard (for example via *Edit* → *Copy*).
- Go to Global Mail PostKIT.
- Click on the  icon (address copying) on the right of the address book icon. The address copied from the word processing application will appear in the window.
- You now have the option of making corrections or additions to the address. If you make

corrections in the word processing application, select and copy the address there again and click on the “Refresh” button in Global Mail PostKIT to submit the changes made.

- The “Cancel” button cancels the process without saving the data you have entered.
- If everything is correct, click on “OK”. The addressee address will be copied to the shipment preparation screen. When you assign a short name or customer number, the addressee address will be saved in address management too.

NB: It is only possible to copy addresses in shipment preparation. Addresses which were corrected in Global Mail PostKIT are not copied automatically into the letter to the customer.



Select multiple addressee addresses

You have the option of selecting several addressee addresses at once. To do so, open the address selection dialogue in shipment preparation by clicking on the address book icon. In the “Select addresses” dialogue which then appears, you can select any addresses and submit the selection you have chosen in shipment preparation by clicking on “OK”. You can select consecutive addresses by holding down the SHIFT key and arrow keys or by holding down the SHIFT key and clicking on the last entry to be selected. If individual selections are to be removed from a selected list or further entries, which are not next to each other, are to be selected, you can do so by holding down the CTRL key and clicking on the mouse. Consecutive mouse clicks on an entry with the CTRL key pressed down will select and then deselect the entry.

After you have clicked on “OK” to copy the selection to shipment preparation, you will not be able to change the informa-

tion in the addressee area any further. The fields are greyed out and are just for display purposes. The following message will appear in the “Name” field: “x shipments have been selected”, where x stands for the number of selected addressee addresses. To make another selection, you must open the selection list using the address book icon again and can deselect any addresses or add different ones there.

If several addressees have been selected, various things must be noted:

- The first shipment number is requested on completion. If, in the options, you have selected that the shipment numbers should automatically be generated consecutively, the following shipment numbers will be assigned automatically and just have to be confirmed, if necessary.

If the “Always confirm shipment numbers” option has not been selected in *Options* → *Shipments* → *Preparation*, only the first shipment number will be preset in a dialogue, and after you click on “OK” all further shipment numbers will be assigned automatically, with no control on your part.

- You can make changes to the shipments at a later time by scrolling in shipment preparation, editing the information and clicking “Finish” again. If necessary, a new shipment number will be assigned and the existing one will no longer apply.

Tips for effective use

To use the multiple selection effectively, it is a good idea to divide the recorded customers into groups and to filter by them when you make your selection.

This can be clarified by looking at an example for using groups:

You want to send some dunning notices. The addresses of the customers in question are available to you in Excel sheets, for example, or you

export them from another application into a file format supported by Global Mail PostKIT. Now proceed as follows:

Create a new group in group management as described in Create new group. Call this “Dunning May 2004”, for example.

- Import the addresses via *Master data* → *Addresses* → *Import addresses*. To do so, proceed as described in Create external address book and Start import.
- When you start the import, you can assign all addresses selected for the import to one group before you carry out the actual import in the “Import addresses” dialogue. Select the group you created previously – in our example, “Dunning May 2004”.

Now the customer addresses in question will be available in the address management of Global Mail PostKIT and you can prepare the shipments. To do so, proceed as follows:

- You can open the address book using the address book icon in the “Addressee” area in shipment preparation.
- Open the “Filter addresses” dialogue using the “Filter” button.
- You can select one of the existing groups via the “Group” filter criterion. Select “Dunning May 2004” or the group you have created and leave the dialogue by clicking on “OK”.
- The addresses for the dunning notices will now be listed in the “Select addresses” dialogue.
- Select the whole list using the key combination CTRL + a.
- Leave the dialogue by clicking on “OK”.
- Shipment preparation now shows that several addresses have been selected. After selecting the sender and product, you can finish the shipments.

Just one final comment about dividing into groups:

An address can be assigned to any number of groups. Create your groups in such a way that they serve your post dispatch needs in the best possible way. Efficiently dividing the addresses into logical groups can become increasingly important as your stock of addresses grows.

6.5 Product selection

The products are displayed in the lower part of the shipment preparation screen.

The screenshot shows a form with the following sections:

- Shipment type only:** Includes radio buttons for Globalmail Business, Globalmail Parcel, Registered items, Registered items + advice of delivery, Registered items + cash on delivery, and Registered items + advice of delivery + cash on delivery. The 'Registered items + advice of delivery' option is selected.
- In conjunction with Priority service level:** Includes a radio button for Priority, which is selected.
- Mail terminal:** A dropdown menu showing 'MIAMI DP'.
- International cash on delivery:** Includes an 'Amount' field with a Euro symbol and a 'Bank Details' section with fields for Account holder, Account no./IBAN (2222), and Bank name/BIC (33333).

You can select the basic product and the special services by selecting the checkboxes.

If you have selected the “advice of delivery” special service, you must select the relevant Mail Terminal.

NB: The name of the customer and the responsible Mail Terminal are printed on the advice of delivery. Therefore, please ensure the Mail Terminal is assigned correctly to your shipments with advice of delivery. Only correct assignment will ensure that the advices of delivery are returned to the right senders.

If the “cash on delivery” special service is selected, the cash on delivery amount must be entered in the relevant field. You can only enter a cash on delivery amount in this “Amount” field if you have selected the “cash on delivery” special service. The figures in euros and cents must be separated by a comma.

NB: Please note the country-specific cash on delivery regulations. They are displayed on the Internet at www.dhl-globalmail.com.

6.6 Assigning the shipment number

After you have filled in all required fields for shipment preparation in the shipment preparation screen, click on the “Finish” button.

To finish the shipment, you must provide it with a shipment number. Global Mail PostKIT supports the following operations for this:

1. Enter the shipment number manually in Global Mail PostKIT
2. Copy the shipment number to Global Mail PostKIT using the hand scanner
3. Automatic generation of consecutive shipment numbers

Enter the shipment number manually in Global Mail PostKIT

You provide your shipments with labels from the roll or use prepared envelopes, or, for example, cash on delivery forms and want to transfer the individual shipment numbers directly to Global Mail PostKIT.

In this case, deactivate the “Automatically generate consecutive shipment numbers” function in the options and enter the shipment number manually.

Please ensure that the shipment number you enter matches the number on the shipment.

Copy the shipment number to Global Mail PostKIT using the hand scanner

By using a hand scanner, you can simplify the workflow for shipment preparation. The procedure in Global Mail PostKIT here is the same as that for entering shipment numbers manually.

NB: Global Mail PostKIT does not provide a special interface for using hand scanners. To work with a hand scanner, set up a so-called keyboard loop scanner on your workstation computer.

Automatically generate consecutive shipment numbers

You provide your shipments with labels from the roll or use prepared envelopes or, for example, cash on delivery forms with consecutive numbering.

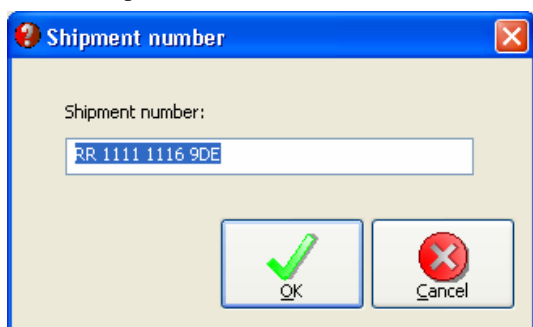
If you assign the shipment numbers consecutively on the label roll, Global Mail PostKIT can

suggest the next shipment number for you in each case so that you just have to check it and confirm it.

NB: Please ensure that the suggested shipment number always matches the number on the shipment. In particular, each time you change the label roll, the suggested shipment number must be corrected manually.

You can activate automatic generation of consecutive shipment numbers in the options.

Once the shipment number is entered in the dialogue, confirm the entry by clicking on the “Submit” button. The shipment will now be generated and transferred to shipment provision. The shipment preparation screen is now available for entering another shipment.



6.7 Postpone shipments

If the current shipment preparation data is incomplete, you can buffer the shipment by clicking on the “Postpone” button. In shipment provision, these shipments are highlighted in yellow as they are not yet ready for posting (see Scroll through shipments).

Once you have all of the information for this shipment at a later time, you can finish the shipment for shipment provision.

6.8 Delete shipments

By selecting the “Delete” button, you can delete the entry fields in the screen if the current shipment is not yet finished or has been postponed.

A shipment which has already been saved is removed from the database if you click on “Delete”. You can view saved shipments by scrolling through them in the navigation bar (see Scroll through shipments). In shipment provision, you can display a shipment by selecting “Edit” in shipment preparation and delete it there.

6.9 Printing the cash on delivery international inpayment money order

With Global Mail PostKIT, you can print directly on pre-prepared forms. You can activate printing of a cash on delivery international inpayment money order in *Master data* → *Options*.

When you print the cash on delivery international inpayment money order, the bank details specified in the master data of the master (or client) are used. That is the only place the account details can be changed, too (under *Master data* → *Manage clients*).

To ensure exact printing, the paper should be fed into the printer edgeways.

It is possible to print on the cash on delivery inpayment money order in shipment preparation and shipment provision.

6.10 Print advice of delivery

With Global Mail PostKIT, you can print directly on the front of the advice of delivery. You can activate printing of advice of delivery documents in *Master data* → *Options*.

To ensure exact printing, the paper should be fed into the printer edgeways. For this type of feed, the cover of the adhesive strip should end at the edge of the form. The cover must not become detached.

It is possible to print on the advice of delivery in shipment preparation and shipment provision.

6.11 Print label

With Global Mail PostKIT, you can create the address labels for your shipments yourself. Under *Master data* → *Options*, you can describe the label sheets you use and activate label printing.

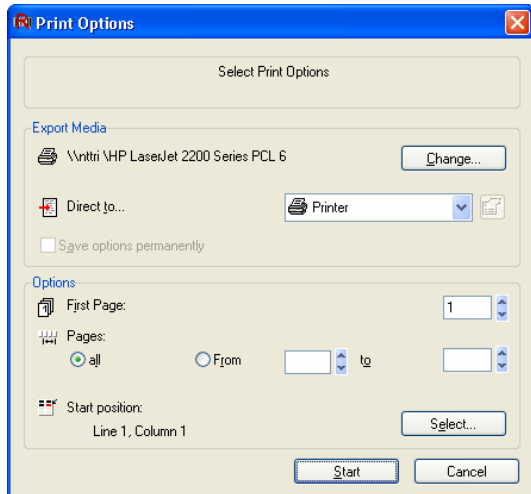
Output settings

In the window for the output settings, you can specify your details for printouts.

After you have made all of your settings, begin the printing process by clicking on “Start”.

NB: If you want to view the print layout before you start printing, please select “Preview”. You can then start printing from the preview window.

Output medium

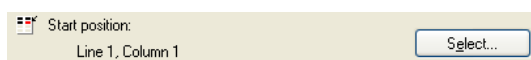


In the “Output medium” area, you can change the printer by clicking on “Change”. In addition, you can choose to print using the printer you have selected or go to a preview window instead. Under “Output on...” you can choose between a printer and a preview.

You can make these changes on a one-off basis or save them as a new setting by activating the “Save settings permanently” option.

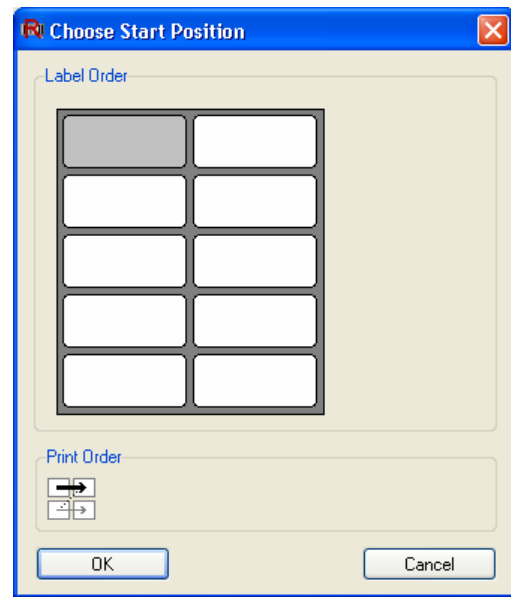
Options

In the options area, you can specify the start page and the area to be printed.



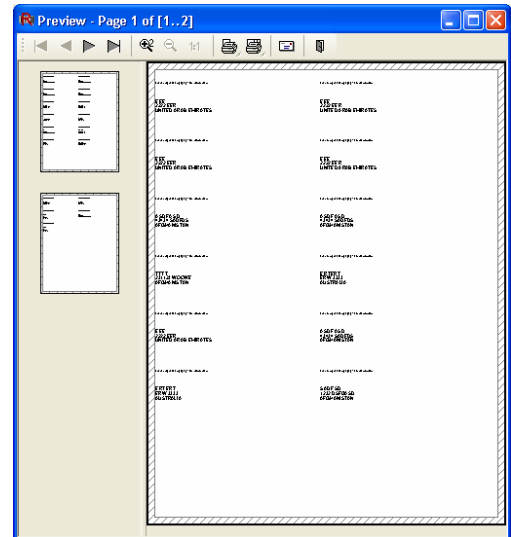
If you want to use sheets of labels that have already been used, you can specify the first label to be printed in the “Select start-

ing position” option. To select this dialogue, please click on “Select”.

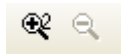


Use the mouse to select the label where printing should start.

Print preview



In the left-hand part of the preview window, you can see a small version of the individual pages to be printed. If you click on a page, it will appear in the right-hand part. You now have the option of navigating between the pages to be printed using the arrow buttons displayed.



Using the zoom selection list and magnifying glass, you can enlarge or reduce the print preview.



If you want to print the labels, you can either start printing the ones currently displayed or all pages by activating the print buttons.




If you click “Close” you will leave the preview window.

NB: The print pages displayed will not be printed if you close the preview window. If you want to print them out, activate the printing buttons first.

7 Shipment provision

After you have entered all of the shipments, the daily closing must be performed for pick-up or posting (shipment provision).

Call up shipment provision by clicking on the shipment provision button  in the toolbar or via the *Items* → *Item provision* menu, or use the *F3* function key to open the shipment provision screen.

The shipment provision screen is divided into three tabs (shipments, posting list and logs), which are explained below.

7.1 Shipments

In the “Shipments” tab, all incomplete and complete shipments are listed together with their status.

Incomplete/postponed shipments

Incomplete means that important data for dispatch is missing. This may be:

- Missing information on the special mail services or delivery options
- Missing shipment number
- Missing addressee information
- Or incorrect printing

Postponed shipments are only displayed on the shipments tab as they have not yet been provided and therefore cannot be included in a posting list. You can tell which items are postponed because the lines in question are highlighted in yellow.

Filter shipments by status (postponed/finished)

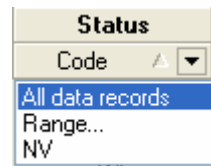
You can filter the shipment display by status.

In the “Status” field, you can select the status code which you want to use to limit the list.

Meaning of status codes:

NE = Incomplete/postponed shipment

NV = Prepared/finished shipment



Select “All data records” to display all of the shipments.

Edit shipments

If you double-click on a selected shipment or click on the “Edit” button, the shipment will be incorporated into shipment preparation again. Incomplete shipments can be completed there, and completed shipments can be changed or deleted.

Shipment numbers which have already been assigned will no longer apply to corrected or deleted shipments. With changed shipments, a new shipment number will be assigned. If applicable, you must stick the new shipment number over the label which is already stuck on the letter.

Print

Before you provide the shipments, you can print the cash on delivery international inpayment money order, the advice of delivery and the labels again. To do this, click on “Print”. The dialogues described in section 6.9 et seq will appear. It is possible to print shipments which have been selected beforehand in the “Shipments” table.

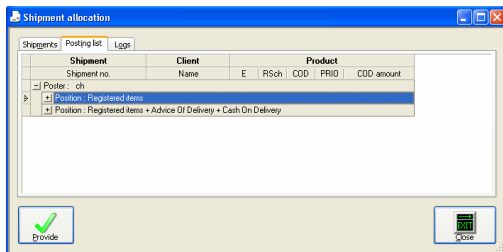
Directly after shipment provision is called up, this is the shipment which is marked by a black arrow ▶ to the left of the table row concerned.

7.2 Provide posting list/shipments

On the “Posting list” tab, a list of all finished shipments is displayed by the party who posted them (poster). In the options (*Master data* → *Options* → *Shipment provision*), you can specify whether you want to post the shipments in your own name (master) or in the name of the clients with customer numbers. The posting lists will be generated depending on your settings.

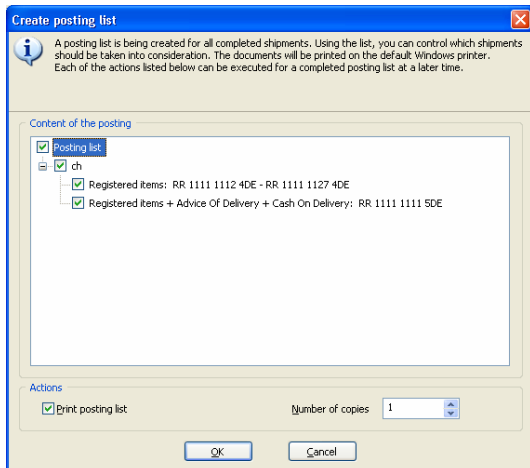
NB: So that Global Mail PostKIT can post shipments in the client’s name, a billing address must be specified for the client in question. You can set up a billing address for newly created clients in *Master data* → *Client management* by selecting a sender address for the client and clicking on “Set as billing address”.

To display the shipments pooled under the individual item, click on the plus sign +. To close the shipment display again click on the minus sign -.



Provide shipments

To provide shipments, click on “Provide”.



In the dialogue which then appears, you can decide what actions to perform with provision.

By making selections in the “Posting content” area, you can decide what shipments to include in the posting list. Shipment number ranges and posters (if you are posting items in the client’s name) can be selected/deselected comprehensively. A prerequisite is that the posting list must contain all correctly prepared shipments, and not postponed shipments. Individual shipments from consecutive shipment number ranges cannot be selected here. Rather, they must be postponed to item preparation and will no longer appear in the overview of possible shipments for posting.

If you want to print the posting list, please select the “Print posting list” box. You can choose the number of copies using the List & Label function.

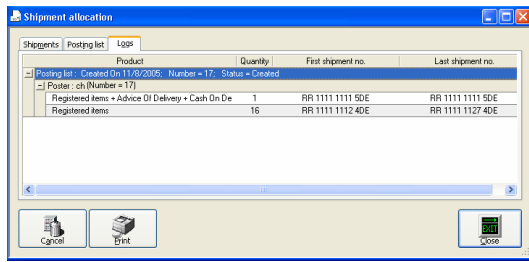
Depending on the selection made, the following actions are carried out.

- The posting list of the selected shipments is printed, with the number of copies you have selected.
- In Global Mail PostKIT, the shipments are removed from the posting list and transferred to the “Log” tab.

7.3 Logs

In the “Logs” tab, you have the option of viewing all provided shipments with information on the creation date and time, the number of shipments per posting list and the status of the posting list.

To display the individual shipments in the posting list, click on the plus sign +. To close the shipment display again, click on the minus sign -.



Print

By selecting the "Print" button, you can print out the documents, which were generated in shipment provision, once again.

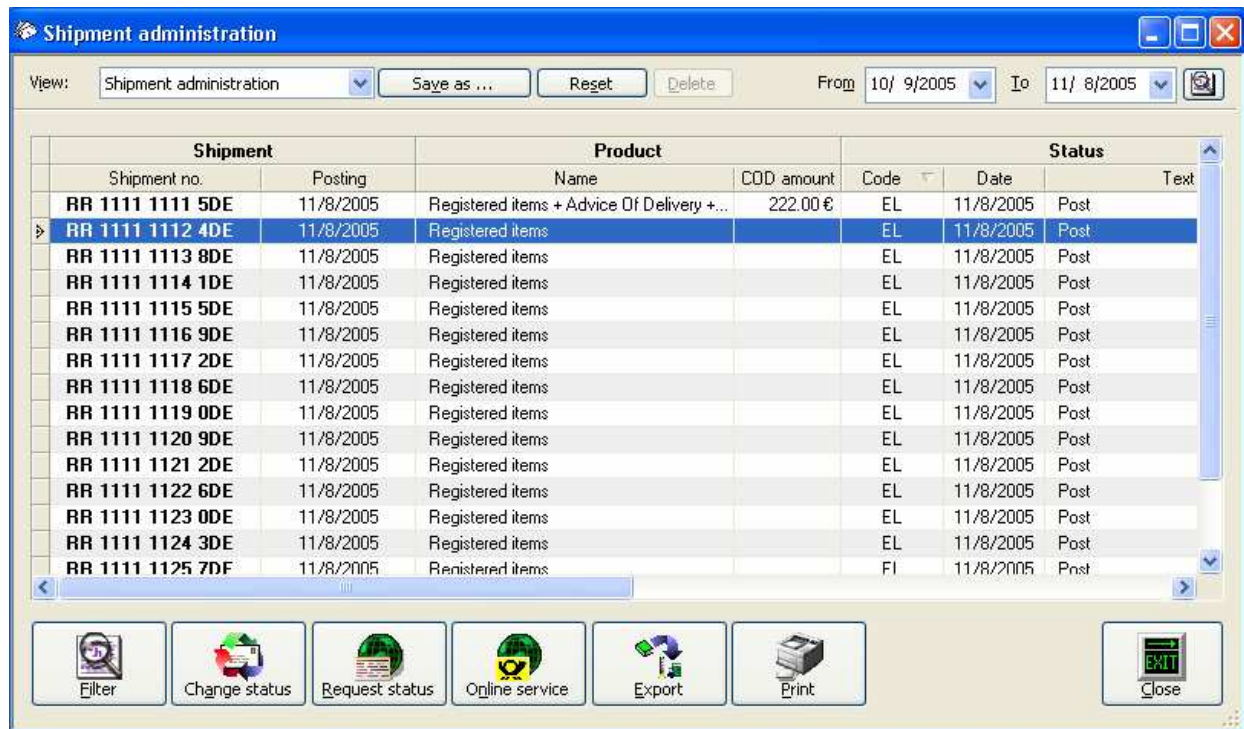
8 Shipment management



Call up shipment management by clicking on the shipment management button in the toolbar or via the *Shipments* → *Shipment management* menu, or use the *F4* function key to open the shipment management screen.

All posted shipments are managed in shipment management. Here, you have the option of sorting or filtering the shipments by specific criteria. You can also reposition the field names within an area, etc. The possibilities for editing the table view are described in the Table properties section.

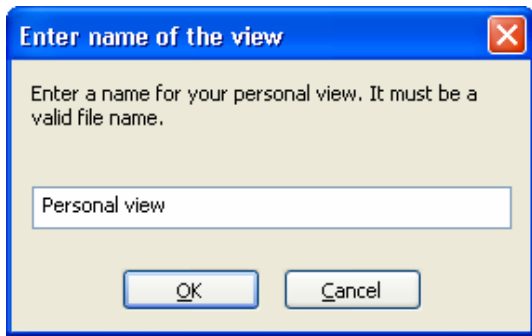
Special functionalities which only come up in shipment management are described in more detail in the next few sections.



8.1 Working with your own table views

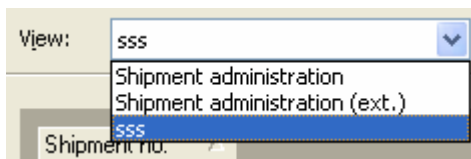
Save views

If you have sorted and grouped the shipments in the table, you can save these setting as your own view and call them up later without having to use the sorting and grouping criteria again. To do so, click on the “Save as...” button in the header of the shipment management screen. In the dialogue which opens, enter a name for the view and click on “OK” to save the view.



Call up saved view

To call up a saved view, open the pull-down menu in the “View” field in the header of the shipment management screen and select the view you want.



Reset saved view

If you make changes to a **saved** view, these changes will be retained. To restore the view you originally saved, click on “Reset”. In this way, you can make short-term changes to an existing view and reverse them again when you no longer need them.

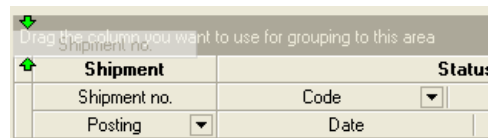
Delete saved view

If you want to delete an individually saved view, call up the view and click on the “Delete” button. Please note that you cannot delete the “Shipment management” view preset by Global Mail PostKIT.

Group an individual view by table column

With saved views (except for the “Shipment management” view), you have the option of grouping the view by table column using drag & drop. Click on the table column that you want to group the view by and hold the mouse button down. The table column will be duplicated and shown in a semi-transparent form. With the mouse button pressed down, drag the table column to the dark grey area above the table configuration. Once green arrows become visible, release the mouse button.

In our example, the view is grouped by product name.



The shipments are now grouped by their product name. To open a group, click on the plus sign **+**, and to close a group, click on the minus sign **-**.

To break up a group again, drag the table column from the dark grey area back to the desired position in the light grey area.

NB: The columns can only be placed under the related table header. For example, the “Name” column from the table headed “Addressee” cannot be placed in the same area as the table headed “Sender”.

Groupings are also copied to the view. If you click on “Reset”, you can restore the original view. If you want to save the grouping under a different name, click on “Save as ...” and enter a name for the view.

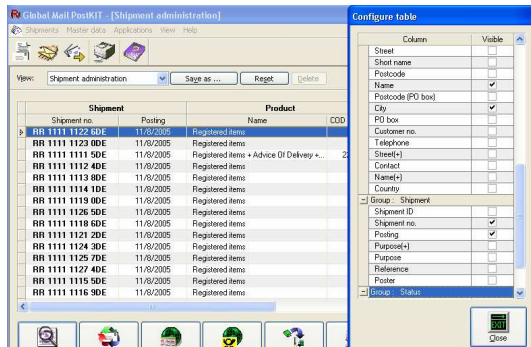
| Shipment no. | Shipment | Product | Status |
|-------------------------------|---|-------------|----------------|
| Shipment no. | Posting | Name | Code |
| Shipment no. RR 1111 1111 50E | | Code amount | Date |
| RR 1111 1111 50E | 1 | 31/8/2005 | |
| Shipment no. RR 1111 1112 40E | Registered Items + Advice Of Delivery + | 222.00 € | EL |
| Shipment no. RR 1111 1113 80E | | | 11/8/2005 Post |
| Shipment no. RR 1111 1114 10E | | | |
| Shipment no. RR 1111 1115 50E | | | |

Configure table view

Not all information within a view may be of interest. You have the option of selecting the fields that are displayed within a table view and therefore of adapting the view to your requirements. To do so, please right-click in the table in a specific table view, and then left-click on “Configure ...”.

A dialogue showing all of the available columns will appear. The columns which are currently visible are marked by a tick in their checkboxes. A column can be removed from the view if you click on the checkbox next to the column name in the configuration dialogue to deactivate it. If you click on it again, the column will be re-activated and appear in the view. The changes are directly visible in the table view in shipment

management, provided that the category in question is displayed on the screen. The figure below shows that the “RS” column was immediately inserted in the Product area in the table view once the user clicked on the checkbox next to the entry of the same name in the configuration dialogue. The sender and client information is not displayed in the example, on the other hand. Of course, this information can be configured in exactly the same way as the information which is being changed in the example.



The settings made apply to the table view from which you opened the configuration dialogue.


You can close the dialogue by clicking on the “Close” button, pressing the ESC key or clicking on the “Close” button in the title bar at the top right of the window. The current settings are **always** applied.

8.2 Filter shipments

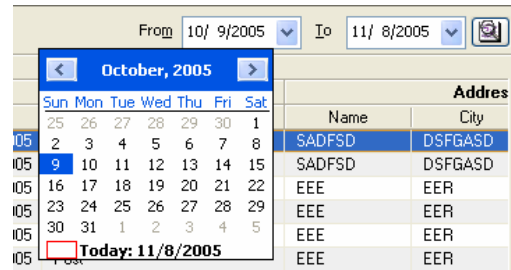
Filter shipments by date

In the header of shipment management, you will see a calendar function which you can use to define the period for the shipments displayed in shipment management. By default, shipments from the last 30 days are always shown in shipment management.

To display shipments from a different period, click on the arrow sign in the date field to open the calendar. Select a “From” and “To” date.

Now click on the magnifying glass icon  to the right of the date fields to display the shipments for the specified period.

Tip: Limit the period so that you can retain a clear overview in shipment management and to ensure you do not slow down the sorting processes.



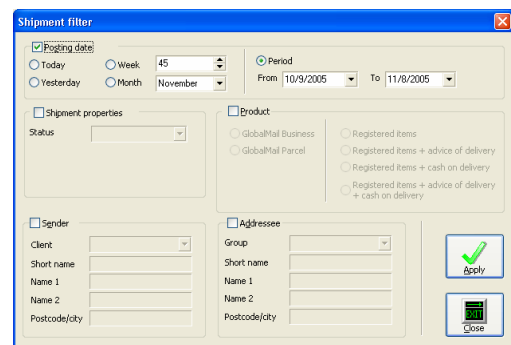
8.3 Other filter options

If you click on the “Filter” button, you can filter the individual shipments which you want to display in the shipment management screen.

You can...

- View today’s or yesterday’s list,
- View specific calendar weeks or months,
- Select any periods or specific days to view,
- Select shipments with specific properties,
- Select shipments of a specific product,
- View shipments from specific senders and/or for specific addressees and/or groups.

Confirm your selection by clicking “Apply”. The data will then be displayed in the shipment management screen.



8.4 Update the shipment status manually

If you want to change a status manually, select the desired shipment(s) and click on the “Change status” button. It is only possible to change the status of shipments in the standard view with the name “Shipment management”.

NB: The status entry field is divided into “Shipment status” and “Comments”. To activate the area in question, select the relevant checkbox. In this way, you can ensure that different values of the individual shipments selected are retained and not overwritten. If, for example, you want to set the same code for the shipment status of several shipments, but different comments are entered for the selected shipments, select the “Shipment status” checkbox only. The different comments will then be retained.

Select the “Shipment status” checkbox to activate the fields below. In the “Code” field, open the selection list and select the status you want. In the “Date” field, select the date when the shipment adopted the selected status.

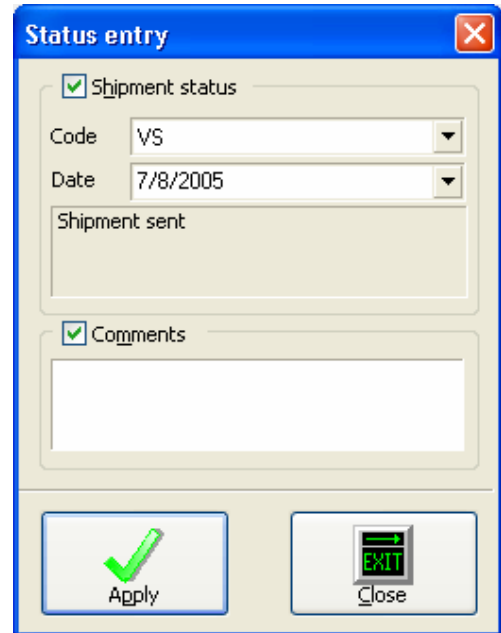
The following delivery statuses are available to you:

| | |
|-----|--|
| NE | Incomplete/postponed |
| NV | Finished |
| EL | Post |
| VS | Shipment sent |
| AB | Shipment ready for pick-up |
| FE | ... User can enter anything |
| NA | Shipment being delivered |
| NÜ | Cash on delivery amount transferred |
| OK | Shipment delivered |
| RÜ | Advice of delivery available |
| ZA | Return shipment to sender |
| !NÜ | Problem transferring the cash on delivery amount |
| !ZA | Shipment returned to sender |
| ?? | Shipment status cannot be determined |

Click on the “Comments” checkbox to record a message in the comments field.

To apply the status change to the shipment(s), click on the “Apply” button.

Click on “Close” to close the dialogue.



8.5 Update status online

Global Mail PostKIT can request the shipment status directly via the Internet. To use this functionality, you must be registered and must have set up an Internet connection to Deutsche Post. The functionality is only available in the standard view with the name “Shipment management”. Select the shipment(s) which you want to update online and click on the “Request status” button.

Tip: Select several shipments by holding down the CTRL key until you have selected all of the desired shipments using the mouse.

NB: The number of shipments whose status you can update in a single status request is limited for technical reasons. Please restrict the number of selected shipments if the request cannot be carried out for all shipments.

8.6 Online service


For the selected shipment, you can call up the Internet page of Deutsche Post showing detailed status information on this shipment by clicking on the “Online service” button. Further services (e.g. make inquiry) are available to you on the Internet pages.

NB: To use the online services, you must be registered, have set up an Internet connection and have Microsoft Internet Explorer, version 5.5 or above, installed on your system.

NB: Global Mail PostKIT requires a username and password to set up the connection to Deutsche Post’s information system. If you have not used a username like this for online access before, you can find this information in the Global Mail PostKIT activation details which you received from Deutsche Post.

8.7 Export shipments

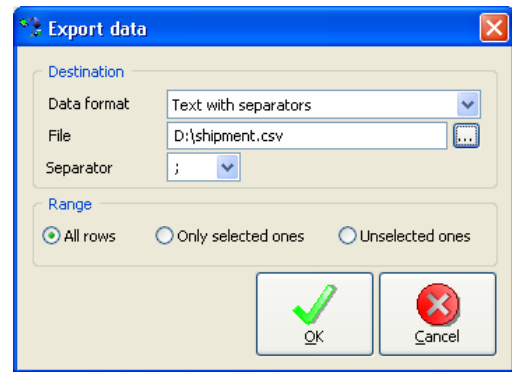
By selecting the “Export” button, you have the option of exporting shipments from shipment management as a text file.

Select the file in which the data is to be saved by clicking on .

Then select the separator for the export and the range of shipments to be exported.

The ranges have the following meaning:

- | | |
|---------------|---|
| All lines | All shipments in shipment management are exported in accordance with the filter set. Grouping and sorting are not taken into account in the export. |
| Selected only | Only the selected shipments are exported. Hold down the CTRL key to select several shipments with the mouse. |
| Not selected | All of the shipments that are not selected are exported. In this way, you can exclude individual shipments from the export. |



8.8 Print shipments

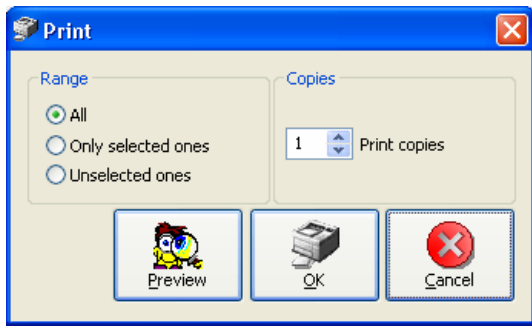
By clicking on the “Print” button, you can print the view you have called up. You can select the number of copies to be printed and the range of shipments to be printed.

The ranges have the following meaning:

- | | |
|---------------|--|
| All lines | All shipments in shipment management are printed in accordance with the filter set. |
| Selected only | Only the selected shipments are printed. Hold down the CTRL key to select several shipments with the mouse. |
| Not selected | All of the shipments that are not selected are printed. In this way, you can exclude individual shipments from the export. |

Click on the “Preview” button to view the output before it is printed and to select another printer.

If you click “OK”, the shipments will be printed on the default printer.




9 Archive shipments

To guarantee fast and clear work with shipment data, you should archive old data stocks regularly. Global Mail PostKIT reminds you automatically once you have shipments in your data stock that are more than two months old. For this to occur, you must have activated the reminder function in the options.

NB: Please note that shipments which have not yet been provided or are incomplete will not be archived.

Call up the archiving function via the *Shipments* → *Archive shipments* menu.

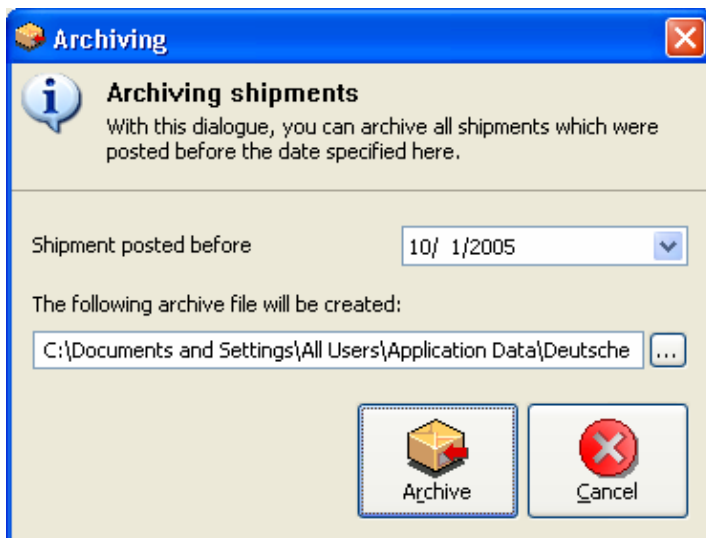
In the archiving dialogue, you can specify the posting date directly or select it from the calendar using the pull-down menu. Global Mail PostKIT will suggest a destination directory, but you can change it. You can change the destination directory manually in the field or by opening the “Save as” dialogue and selecting the destination directory there if you click on the selection button .

Then click on the “Archive” button to start the archiving procedure.

If there are no shipments for the specified date, a message will notify you of this.

If you click on “Cancel” it will cancel the archiving process.

Important note: Archiving is not for data backup purposes. You can only open (dearchive) archived files with your existing (intact) installation. For information on data backups, please read the section entitled Data backup.




10 Dearchive shipments

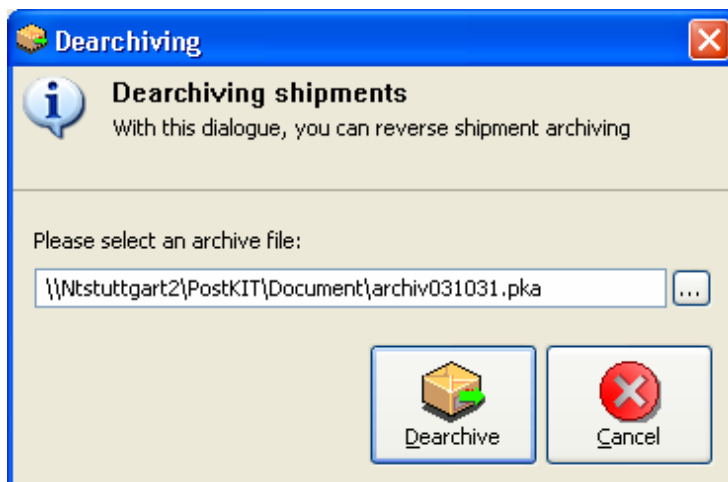
You can call up archived data stocks again via the dearchiving function of Global Mail PostKIT.

NB: You can also dearchive data which was archived using PostKIT version 5.2 here if you copied over the legacy data when you installed the new version. You cannot dearchive shipment which were archived with another Post-KIT installation (i.e. with other activation data).

Call up the dearchiving function via the *Shipments* → *Dearchive shipments* menu.

In the dearchiving dialogue, you can select and open the archive file from file management by clicking on the selection button .

Then click on the “Dearchive” button to start the dearchiving procedure. The shipment data will then be transferred to shipment management for processing.



11 Address management

To update and maintain your addresses, call up address management via the *Master data* → *Addresses* → *Manage addresses* menu.

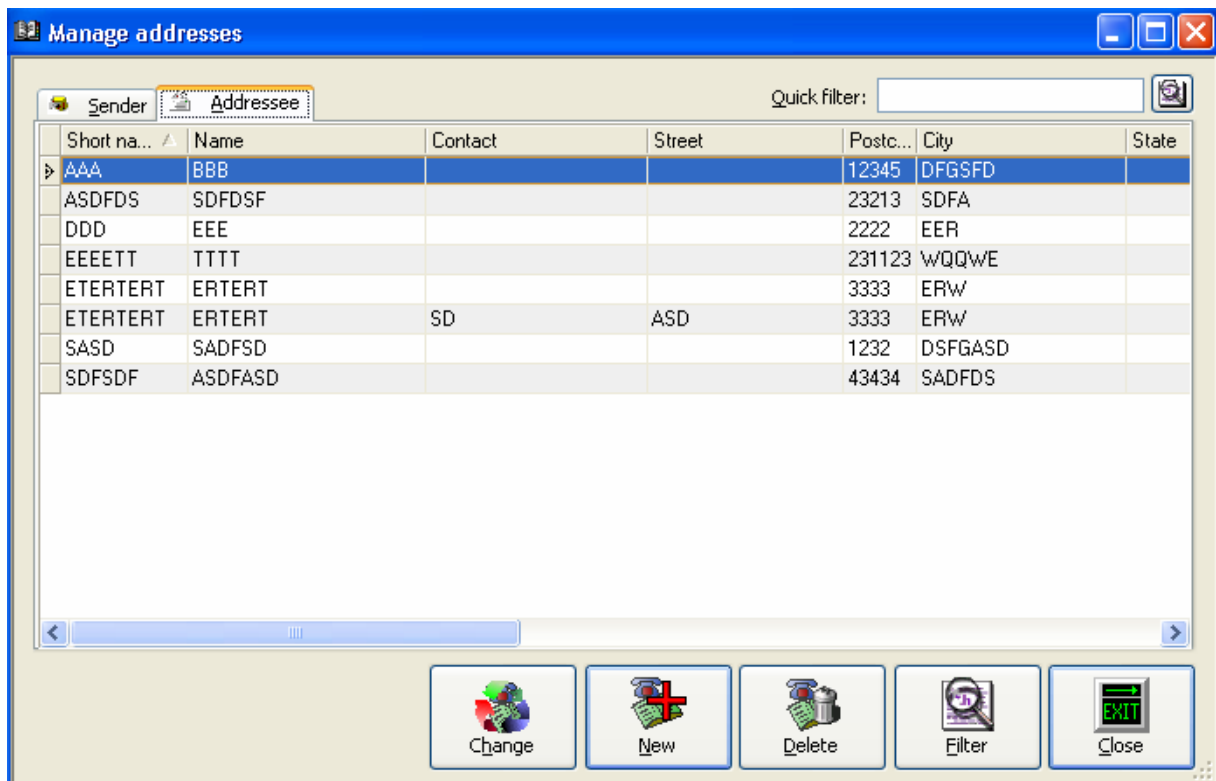
The addresses are displayed on tabs, separated into “Senders” and “Addressees”. Addressee management is the default setting. By clicking on the tab icons, you can change between sender and addressee addresses.

With the quick filter, you can search for the address you want quickly on the tab in question. To do so, enter a search term and then click on the magnifying glass icon to the right of the field to start the search. Once the search has ended, all of the entries for the relevant search term will be displayed.

You can filter and display addresses using specific criteria by clicking on the “Filter” button.

To delete an address from address management, select the desired address, click on the “Delete” button and confirm the security prompt.

By clicking on the “Close” button, you will end the dialogue.



11.1 Create new address

The entry of new addresses via shipment preparation has already been described.

To create new addresses in address management, click on the “New” button.

Blank entry fields will be displayed on the screen. The cursor will be in the “Short name” field.

There are three different categories of addresses which can be saved in address management at the same time. In shipment preparation and label printing, only the type of address which has the highest priority is used.

These are the address categories, starting with the highest priority:

1. **Major customer postcode:** Major customer with its own postcode
2. **P.O. Box postcode, P.O. box:** Shipments addressed to P.O. box number with related postcode
3. **Other:** Shipments addressed to the name, street, postcode, city, state and country

The screens for the sender and addressee addresses are largely identical. Sender addresses can be assigned to a client and therefore have the “Client” field. Addressee addresses have the “Customer no.” field instead. In addition, the “Groups” tab is only relevant for addressee addresses and so cannot be seen in the sender screen.

The “OK” button, which you need to click in order to submit the address you have created to address management, is not activated until all of the mandatory fields have been filled in.

Automatic location recognition for Germany

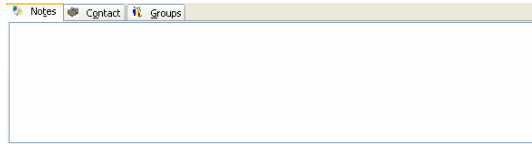
In the postcode and city fields, Global Mail PostKIT 1.0 has a particularly convenient feature. If you enter the full postcode or part of it in the relevant field and then move to the city field using the mouse or keyboard, the known information will be added automatically.

However, if you only enter part of the postcode, you can only miss out the final digits. If the full postcode is, for example, “12345”, you can enter “1234” or “123” and will probably receive a lot of hits (all cities whose postcode starts with the specified digits). However, “2345” or “345” cannot be entered. Global Mail PostKIT 1.0 would then search for all cities whose postcode starts with “2345”. If there are several cities for a postcode, a small selection list will appear in which you can submit the right city in the dialogue for creating a new address by double-clicking on the city in question or by selecting it and then clicking “OK”.

However, you can enter the city by hand in the usual way. This will be the case if no information on a postcode is found. It may be the case, for example, that not all postcodes of Deutsche Post AG’s major customers are stored.

Enter notes

You have the option of saving notes for each address. Click in the notes field. You can then store your comments on the address using free text.



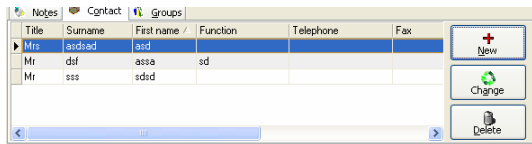
Contacts

Open the “Contacts” tab.

To create a new contact, click on “New”.

To change an existing contact, select the entry to be changed and click on “Change”.

To delete a contact, select the relevant entry, click on the “Delete” button and confirm the security prompt.

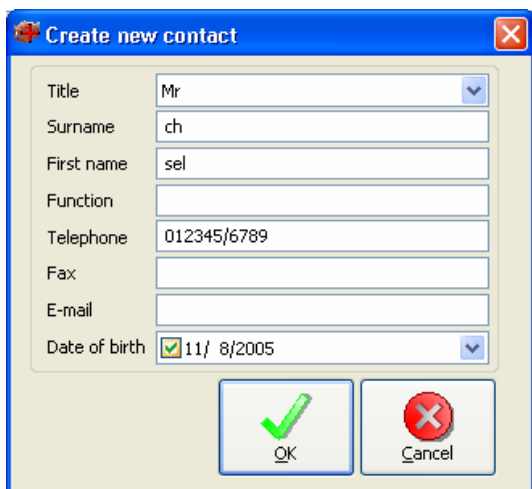


Assign new contact to an address

Click on “New” to open another dialogue.

Enter the data of your new contact and confirm the entry by clicking on “OK”. You can create up to 5 contacts per address in this way.

To cancel the procedure, click on “Cancel”. Data which you have entered already will not be saved.

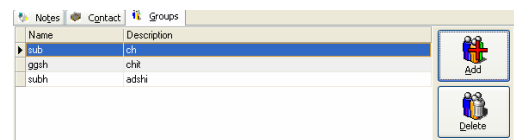


Group assignment

Via the group, you have the option of assigning your customers to specific categories (e.g. direction, sector, product, etc.). With bulk shipments, this offers you the possibility of selecting groups as you desire, and of controlling the dispatch of your items in this way.

Open the “Groups” tab. If the customer is already assigned to one or more groups, the groups will be listed here.

To delete an affiliation to a group, select the group to be deleted and click on the “Delete” button.



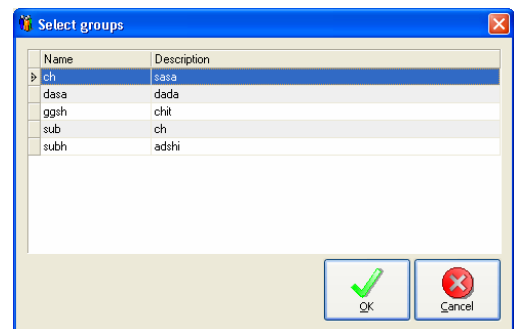
Assign groups to an address

To assign the addressee address to a group, click on the “Add” button.

NB: The “Groups” tab is only visible when you are editing addressee addresses.

Select the desired group from the list of groups and click on the “OK” button. You can double-click on the desired group too to apply it.

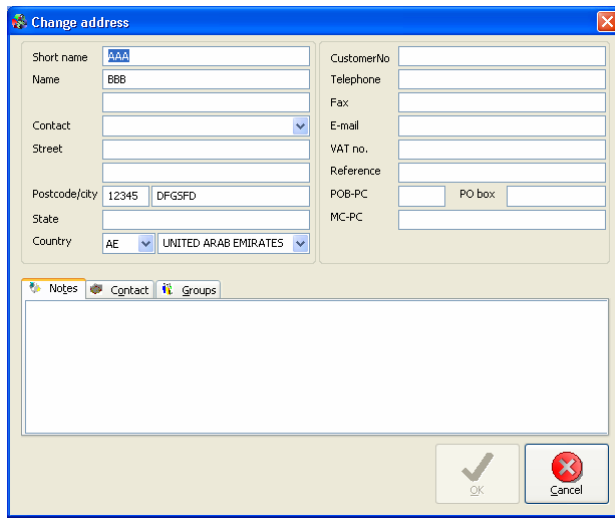
Groups are created and maintained in group management.



11.2 Change address

To change an address, select an address by clicking on it with the mouse and then click on the “Change” button to open another dialogue window. Alternatively, you can open the dialogue window by double-clicking on the address.

Click in the field that you want to change. Use the TAB key to move to other fields. In addition, you can enter notes, insert or change contacts and assign the address to one or more customer groups in the lower part of the screen. The tabs are described in the section entitled Create new address.



11.3 Search for and select addresses

In Global Mail PostKIT, there are various options for copying existing addresses to shipment preparation. The individual options are explained in more detail in the next sections.

Search directly from the address fields of shipment preparation

Search for a short name or customer number

Addresses that have already been stored in address management can be called up directly if you specify a short name.


NB: As an alternative to the short name, you can use the customer number when entering the addressee address in shipment preparation. The Enter an addressee address section of shipment preparation describes how you can switch between the short name and customer number.

In the “Short name” field, simply enter the code of the address you are looking for and press the tab key. If there is precisely

one address with the entered short name, it will be displayed directly in the address fields. If there are several addresses with the same short name in the address stock, the address selection dialogue will open automatically and the addresses found will be listed for you to make your selection.

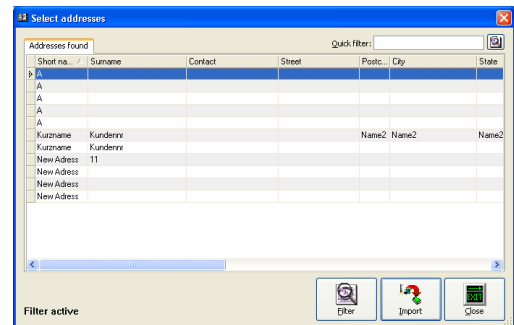
Search for other address components

If you know other parts of the address (e.g. contact name, company name, street, etc.), you can enter the search terms directly in the relevant entry fields.

Click on the address book icon  or press the F3 key to display the address selection dialogue with the hits.

Search via “Select addresses” dialogue

The saved addresses are displayed for you to select in this dialogue. You can limit the number of addresses displayed by using the filter. When you select addressee addresses in shipment preparation, you can select several addresses in order to prepare several shipments in a row.



Search via the quick filter

The quick filter enables you to search for addresses quickly using a search term. The specified term is searched for in the most important address fields.

Enter a term in the quick filter and then click on the magnifying glass icon to the right of it or press the Enter key. If Global Mail PostKIT finds one or more suitable terms, all related entries will be displayed.

To deactivate the quick filter and display all addresses, please delete the search term and press the Enter key.

Search via the filter

If you click on the “Filter” button, you can filter the addresses which you want to display in the address list. Enter the search terms in the relevant fields and then click on the “OK” button. All addresses which contain the search terms will be displayed.

The image shows a dialog box titled "Filter addresses" with a close button in the top right corner. The dialog contains the following fields:

- Short name
- Customer no.
- Name
- Street
- Postcode/city (split into two input boxes)
- State
- Country (with a dropdown arrow)
- POB-PC and PO box (two input boxes)
- MC-PC
- Contact
- Reference

At the bottom of the dialog, there are two buttons: "OK" with a checkmark icon and "Cancel" with a red "X" icon.

12 Address import

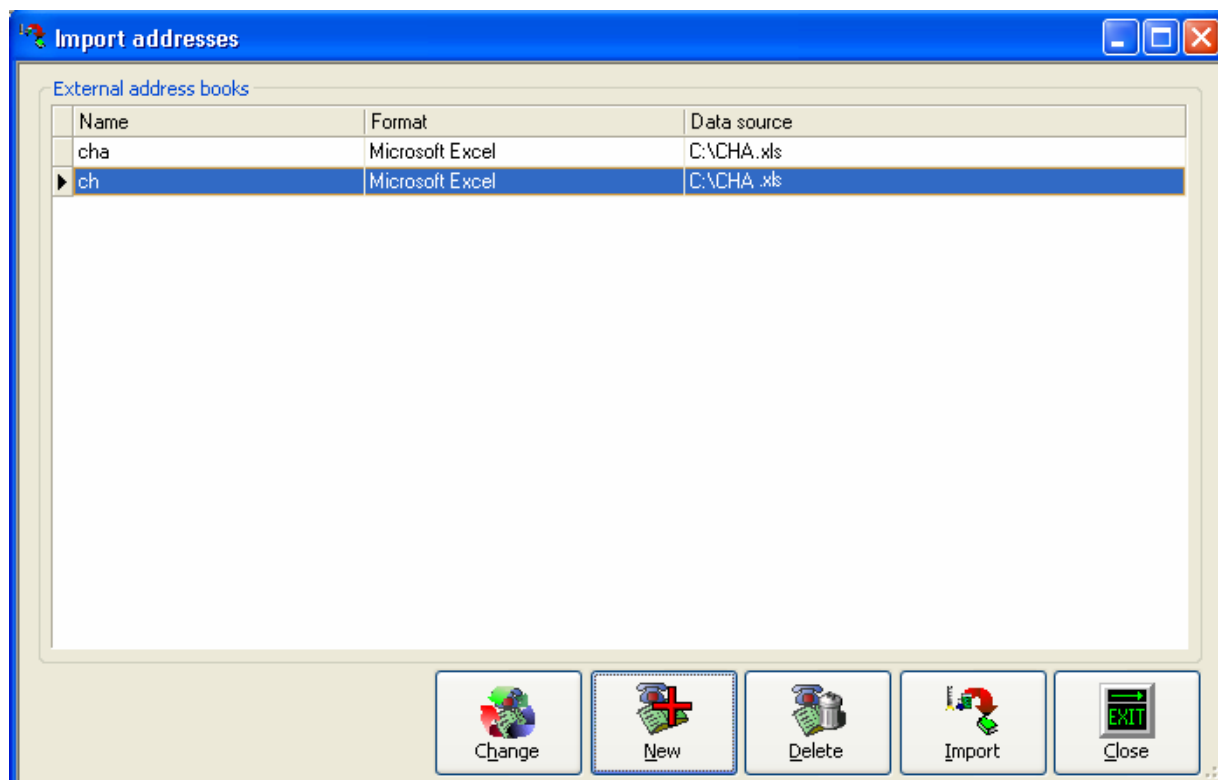
In Global Mail PostKIT, you have the option of importing addresses which you have saved in other formats (e.g. Excel) into address management as an external address book.

Start the import function via the *Master data* → *Addresses* → *Import addresses* menu. Address books which have already been created will be displayed here.

To change an address book which has been created, click on the “Change” button and make the desired changes. The procedure is the same as the creation process.

To import an external address book into address management, select the desired address book and then click on the “Import” button to copy the addresses into address management.

To delete an imported address book, click on the “Delete” button and confirm the deletion. The imported address book is removed from the list here. The addresses remain in address management.



12.1 Create external address book

In this dialogue, you can configure the basic import settings.

The following formats and interfaces can be used for the address import:

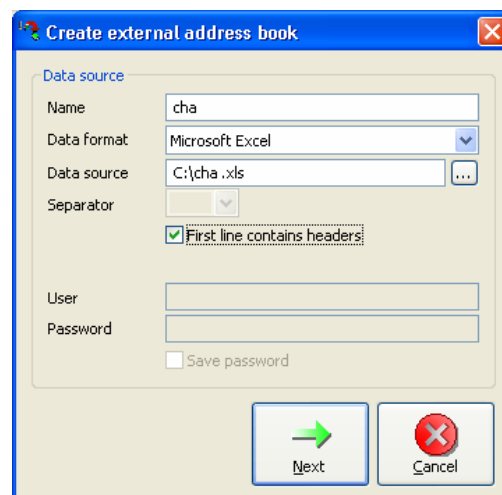
- Text with separators
- Microsoft Excel® from version 5.0
- Microsoft Access®
- Microsoft Outlook®
- Microsoft Exchange®
- FoxPro®
- dBase®
- ODBC
- XML

Assign a name for the import file and select the file format from the pull-down menu. With “Text with separator files”, you can select either a semi-colon (;), comma (,) or tab (TAB) as the separator from the “Separator” selection list. In addition, you can specify **one** other character (any character) as the field separator (e.g. #, @ or |) by entering it directly in the entry field. A selection which has already been made can be overwritten. More than one character cannot be used as a field separator. If your file is in this kind of format, you must firstly adapt the formatting using a suitable text editor by search and replace (e.g. @@ → #).

If your file contains headers in the first line, you must select the “First line contains headers” checkbox.

With some formats, a username and password may be required if the files or formats to be imported have been protected. In this case, enter the ID. If the ID is valid, the fields will be activated.

Then click on “Next” to continue the import procedure.



Assign fields

To ensure that the fields in Global Mail PostKIT address management are filled correctly, you can assign the external fields to the relevant fields in address management using the drag and drop method.

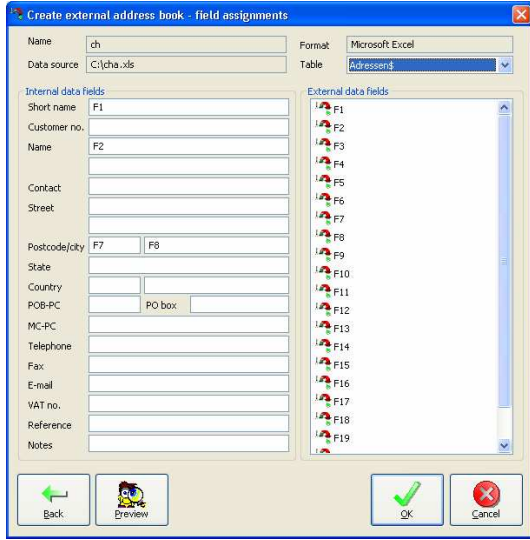
Move the mouse to an external data field. Press the left mouse button and hold it down. Now drag this field to the relevant Global Mail PostKIT address field. Release the mouse button.

Tip: Drag the name of your customer to the short name too. Global Mail PostKIT will form a short name from the name.

The name is a mandatory field which must be assigned. In addition, there must be an assignment to a short name (see tip) or customer number. If an assignment to one of the two fields has taken place, the background of both fields will change from yellow to white, which indicates that the necessary information is available. The same applies to one of the “P.O. Box-postcode”, “major customer postcode” fields or the combination of “Postcode” and “City”.

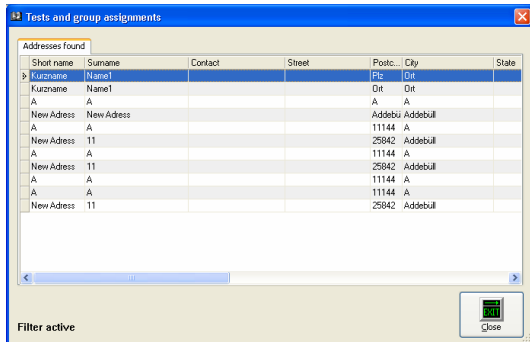
If the minimum assignment requirements have been met, all of the fields which were previously highlighted in yellow turn white and the OK button is activated. Therefore you do not need to assign all fields of an address import to a field in Global Mail PostKIT address management. In

other words, your external address book could contain fields which are not provided at all in Global Mail PostKIT or could contain Global Mail PostKIT fields which the external address book does not know. However, you should assign as many fields as possible so that you can submit as much information as possible.



Preview of the addresses to be imported

Once all mandatory fields have been assigned, you can check the addresses to be imported once again using the “Preview” button.



12.2 Change external address book

Click on the “Change” button to change the settings to an existing external address book. The procedure is the same as the one described in the previous section for creating an external address book.

12.3 Delete external address book

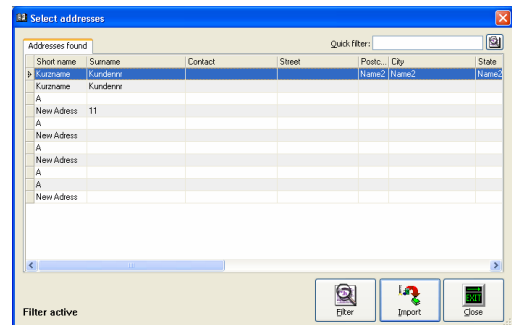
By clicking on the “Delete” button, you can remove external address books that you have defined from the list.

12.4 Start import

To start the address import, click on the “Import” button. The external address book data is now displayed in the selection dialogue. In this dialogue, you have the option of selecting the addresses that you want to copy to Global Mail PostKIT from all of the addresses available. You can limit the amount of addresses using the filter dialogue or the quick filter. To obtain a description of the filter options, please refer to the section entitled “Search via the Select addresses dialogue” in the address management section.

In addition to the filter options, you also have the option of selecting specific shipments for import by selecting these shipments in the list displayed.

Tip: Select several shipments by holding down the CTRL key until you have selected all of the desired shipments using the mouse.



After you have limited the amount of addresses found, you can continue using “Import”.

Then you can configure the settings for carrying out the import.

Range

Here, select whether you want to import all addresses found or just the selected addresses. If there are only individual shipments which you do not want to import from the addresses found, you also have an “Unselected addresses” option. In this case, all the addresses found are imported, apart from the selected ones.

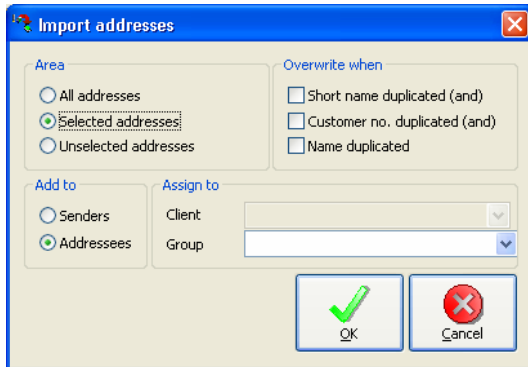
Overwriting addresses

In the “Overwrite when” area, you can specify when existing addresses should be overwritten by new, imported shipments. If you select several of the specified options, only the addresses which match the selected criteria will be overwritten.

Assignment of the imported addresses

Firstly, select whether the addresses are addressee or sender addresses. For sender addresses, you must also select the client to which the addresses are assigned.

When you import addressee addresses, you can assign them directly to a group in order to be able to distinguish the imported addresses easily from the other addresses later on. To do so, select the group to be assigned or enter the name of the new group.

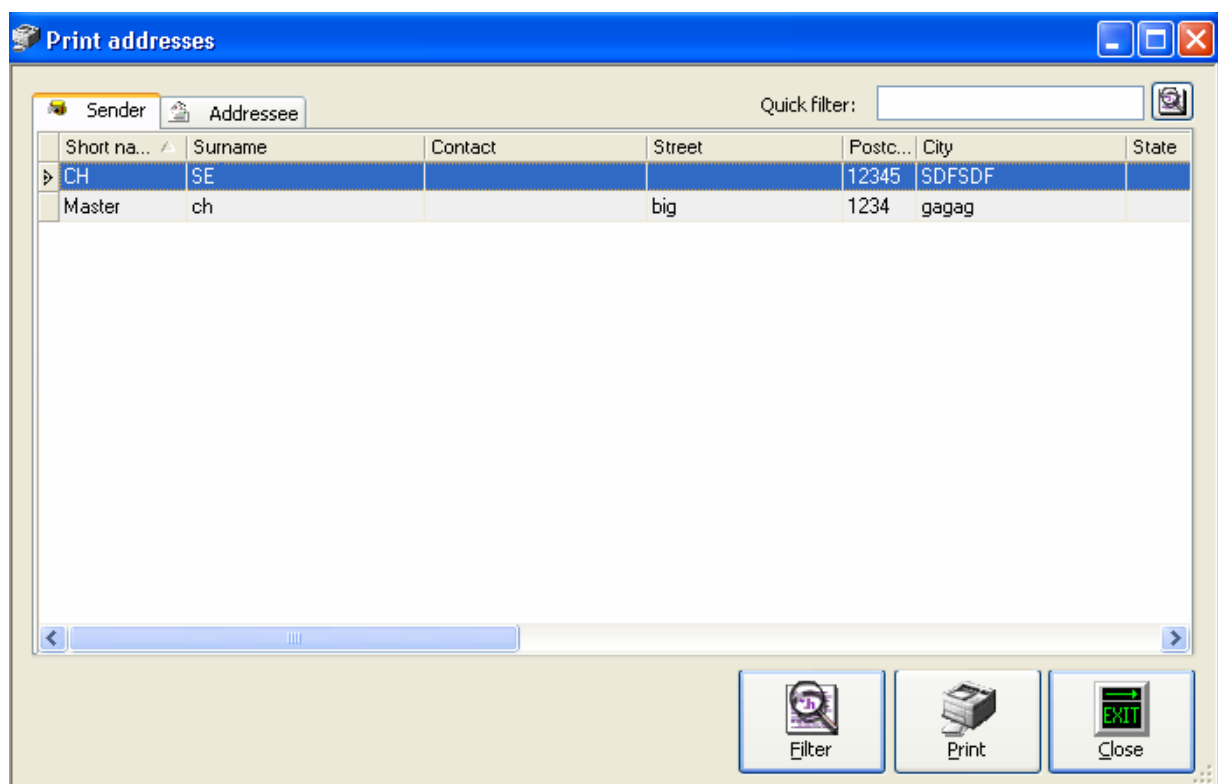


13 Print addresses

With this dialogue, you can create a printed list of any quantity of the addresses stored in Global Mail PostKIT.

Start this function via the *Master data* → *Addresses* → *Print addresses* menu.

You can limit the quantity of addresses to be printed using the filter or the quick filter. To obtain a description of the filter options, please refer to the section entitled “Search via the Select addresses dialogue” in the address management section.

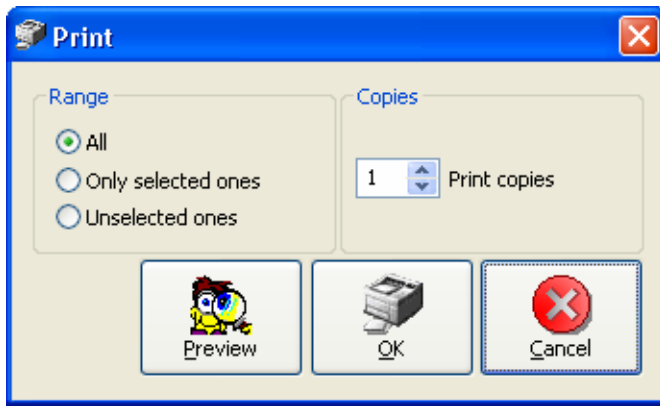


After you have limited the quantity of addresses to be printed, you can continue by clicking on the “Print” button. Here, select whether you want to print all addresses found or just the selected addresses. If there are only individual shipments which you do not want to print from the addresses found, you also have an “Unselected” option. In this case, all the addresses found are printed, apart from the selected ones.

In addition, you can specify the number of copies to print.

To obtain a print preview, click on the “Preview” button.

Select the preview too if you want to use a printer other than the default printer.



14 Address export

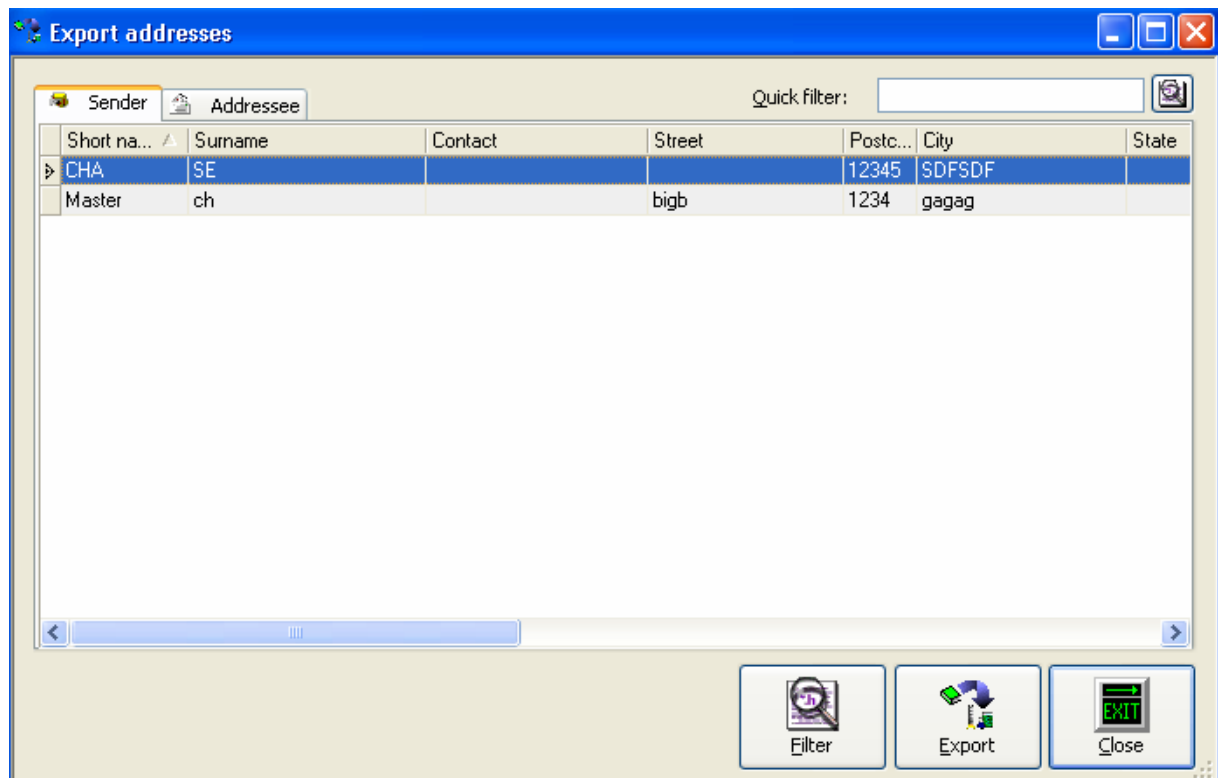
You have the option of exporting the addresses you have saved in order to use them in other programs.

Start the export function via the *Master data* → *Addresses* → *Export addresses* menu.

The screen shows all addresses created in address management that are arranged into sender and addressee addresses. You can move between the sender and addressee addresses by clicking on the tab in question.

You can limit the stock of addresses using the quick filter or the filter function by clicking on the “Filter” button.

Click on the “Export” button to reach the next dialogue.



14.1 Select format for address export


After you have clicked on the “Export” button, another dialogue will appear. Here, you can specify the file format of the export file.

The following formats and interfaces can be used for the address export:

- Text with separators
- Microsoft Excel® from version 5.0
- Microsoft Access®
- FoxPro®
- dBase®
- XML

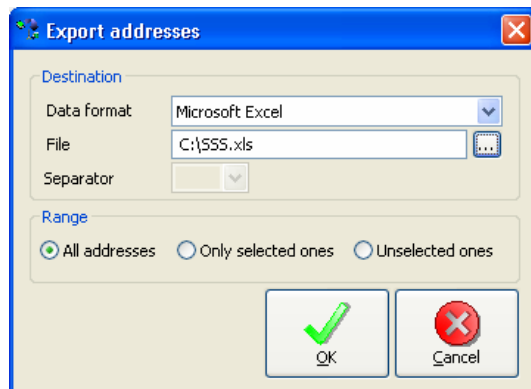
Select the file format. With “Text with separator files”, specify either a semi-colon (;), comma (,) or tab (TAB) as the separator or define any character as the separator yourself.

In the “File” field, enter a file name for saving your file.

By clicking on the selection button , you can also select a directory where your export file should be saved.

In the “Selection” area, you can define whether all of the addresses found from the list of the preceding dialogue should be exported or only the selected or unselected ones.

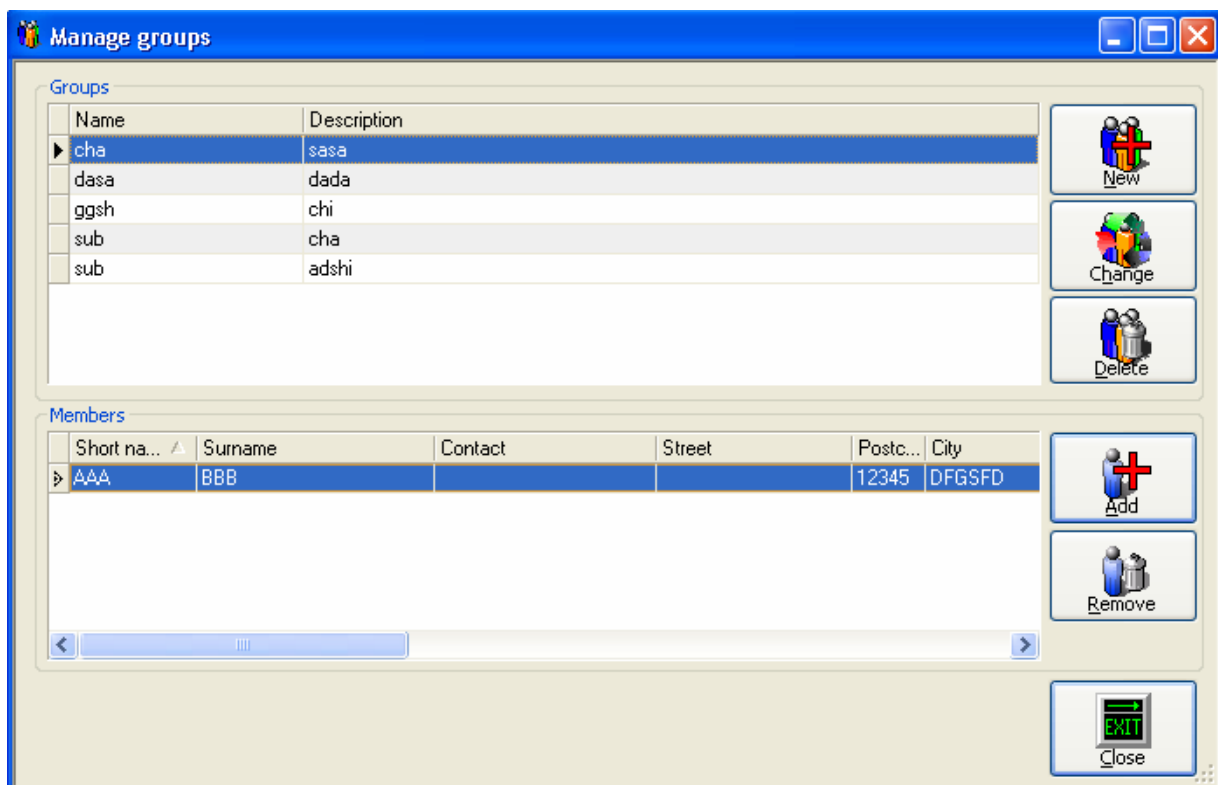
When you have made your entries, click on the “OK” button to start the export. If you click on “Cancel”, you will cancel the export without saving any data.



15 Group management

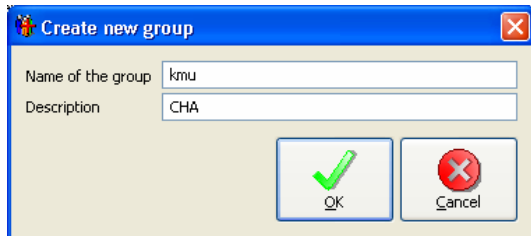
By using groups, you have the option of assigning your customers to specific categories (e.g. regions, directions, sector, products, etc.). With bulk shipments, this offers you the possibility of selecting groups as you desire, and of controlling the dispatch of your items in this way.

The group management screen is divided into two areas. All of the groups created are displayed in a list in the top area. All addresses assigned to the selected group are listed in the bottom area.



15.1 Create new group

To create a new group, click on the “New” button, which will open another dialogue. Assign a name for the group and describe it. Click on “OK” to save the new group in group management.



Tip: You can also create groups directly when you import addressee addresses.

15.2 Edit groups

To change a group, select the group in the list and click on the “Change” button. Make the desired changes in the dialogue which opens and then click on “OK” to save the them.

15.3 Delete groups

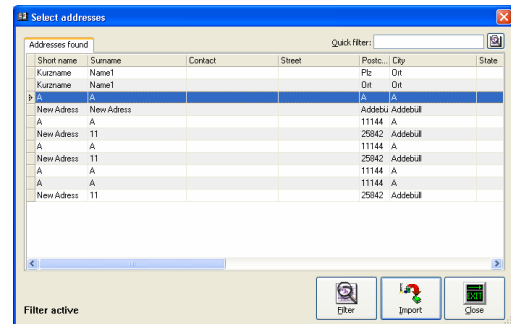
To delete a group, select the desired group in the list and click on the “Delete” button. Confirm the security prompt to remove the group from group management. Deleting groups will remove all assignments which existed between any addresses and the deleted group.

15.4 Assign members to a group

After you have created a group, you can assign members to it. To do so, select the desired group in the list and click on the “Add” button.

In this dialogue, you can sort the addressee addresses in ascending or descending order by clicking on the column name. You can search for addresses using the quick filter or the filter function. Select the desired addresses and confirm the dialogue in order to submit the addresses as members for the group.

To submit several addresses, you must select all of the addresses in question. To do so, hold down the CTRL key until you have selected all of the addresses using the mouse.



15.5 Remove members from a group

To remove members from a group, select the group. Select the desired members from the list and click on the “Remove” button. Confirm the security prompt.

The addresses are just removed from the group but are not deleted from address management.

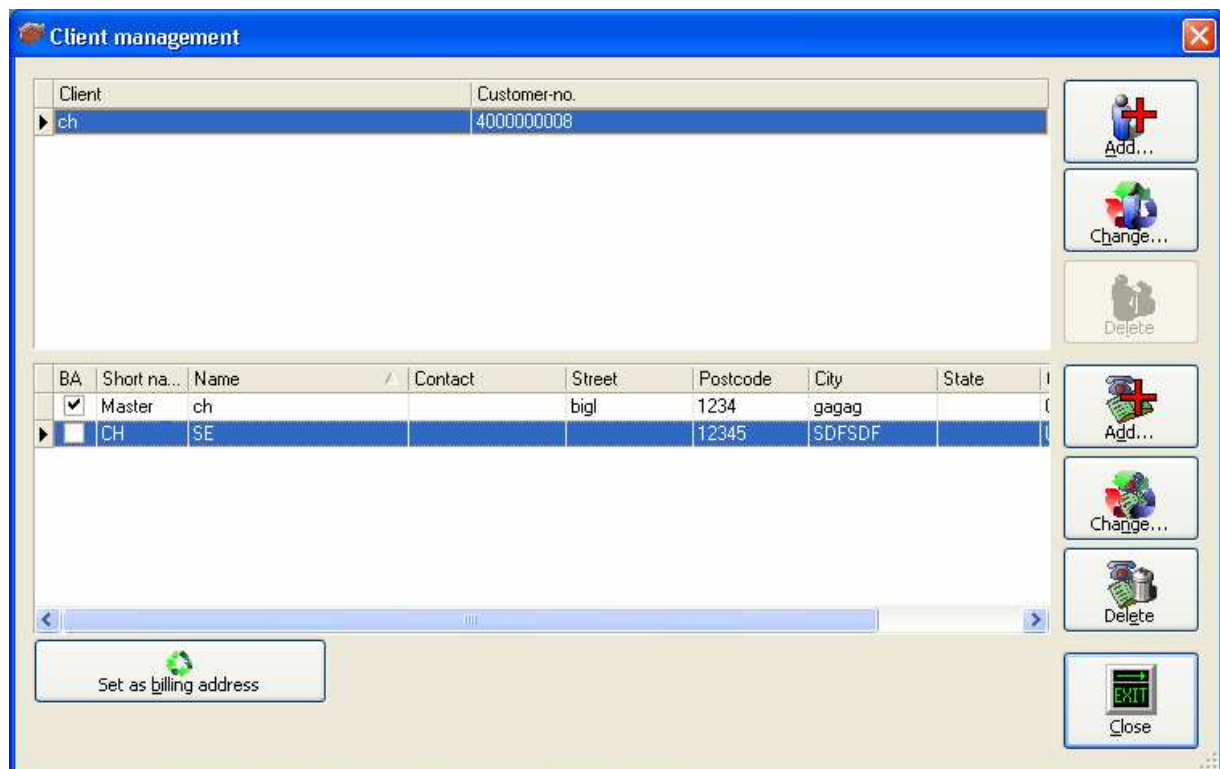
16 Client management

Global Mail PostKIT offers you client setup and management options. If you, as a service provider, manage the mail room for various other companies, you also have the option of managing addresses by client and posting shipments by client.

In addition to the master address (sender address), which is also the first (master) client in client authorisation, you can create any number of additional clients and their addresses. These additional sender addresses may be, for example, subsidiaries or branches of your own company.

NB: You should create internal departments as senders only, not as clients.

The client management screen is divided into two areas. All of the clients created are displayed in a list in the top area. All addresses assigned to a client are listed in the bottom area.



The client (which is not the master) only appears as a poster in the posting list if it has a valid customer number

and the “Set as billing address” button has been clicked.

If the client does not have an EKP number, it will only appear as the sender on the shipment and, if applicable, on the advice of delivery and cash on delivery international inpayment money order. The master is then named as the poster on the posting list.

Create new client

To create a new client, click on the “Add” button to open another dialogue. Enter the name and the Deutsche Post customer no. here. When you enter the data, the customer number you enter will be checked automatically to ensure it is correct. Enter the client’s bank details if cash on delivery international inpayment money orders for this client’s shipments are to be printed with Global Mail PostKIT.

Click on “OK” to confirm the entry and return to the client dialogue. Click on “Cancel” to go to the client dialogue without saving your data.

In this way, you can create or change further clients. End the procedure by clicking on “Close”.

16.1 Edit client

To change a client, select the desired client in the list and click on the “Change” button. Make the desired changes in the dialogue which opens and then click on “OK” to save them.

16.2 Delete client

To delete a client and the related addresses, select the desired client in the list and click on the “Delete” button. Confirm the security prompt to remove the client from client management.

NB: Deleted clients cannot be selected when further shipments are created. Shipments which have already been created or posted will not be affected.

16.3 Assign sender to a client

After you have created a client, you can assign sender addresses to it. To do so, select the desired client in the client list and click on the “Add” button in the bottom part of the screen.

The dialogue from address management for creating a new sender address will open (please read the relevant section for a detailed description).

The client is already entered in the dialogue and cannot be changed.

Enter the relevant sender data and then confirm it by clicking on “OK”. The data will be saved.

If you want to assign several sender addresses to a client, repeat the procedure for each sender which you want to assign to your client.

16.4 Change sender address

To change a client address, select the desired address and click on the “Change” button. Make the desired changes in the dialogue which opens and then click on “OK” to save them.

16.5 Delete sender address

To delete a client address, select the relevant client. Select the desired address from the address list and click on the “Delete” button. Confirm the security prompt.

16.6 Change billing address

You can see which is the billing address because the checkbox for it contains a tick in the “BA” (billing address) column.


If a client has several sender addresses, you can define which of them should be used as the billing address. To do so, select your client from the client list in order to list the sender addresses in the bottom part of the screen. Then click on the desired sender and click on the “Set as billing

address” button. Bills will now be sent to the selected sender which is marked with a tick.

The billing address will be printed on the posting list, provided that it has been specified in the options that shipments should be posted in the name of the client.

| BA | Short na... | Name |
|-------------------------------------|-------------|------|
| <input checked="" type="checkbox"/> | Master | ch |
| <input type="checkbox"/> | CI | SE |

<

 Set as billing address

17 Options

While running the application, you can make changes via the Global Mail PostKIT options.

Call up the options using the *Master data* → *Options* menu. If the application is protected with an administrator password, you must specify the password in order to reach the options dialogue.

The dialogue for setting the shipment preparation options is set as the entry window.

The options window is divided into two windows. In the left-hand window, you will see a navigation tree which you can use to move to various Global Mail PostKIT areas for which options can be set. In the right-hand section, the options are displayed for the selected Global Mail PostKIT area.

17.1 Shipments

Shipment preparation options

Select “Preparation” in the navigation tree to display the options for shipment preparation. The individual areas are described in more detail in the next sections.

If you have changed the options, click on the “Apply” button to save the settings. Click on “OK” to apply the changes and close the window.

Define tab stops

You can define which fields the cursor should skip in shipment preparation if you want to move between the individual fields using the TAB key. To do so, remove the tick from the checkbox next to the field to be removed.

You can only move to fields which have been marked with a tick if you use the tab key to move between fields.

Default sender address

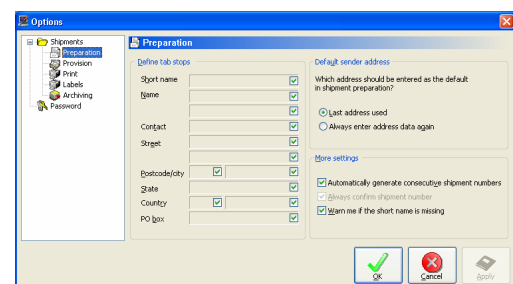
In this area, you can specify which sender address should be set as the default in shipment preparation. Select the desired option field by clicking on it with the mouse.

Other settings

Here, you can specify whether Global Mail PostKIT should automatically generate consecutive shipment numbers when a shipment is being completed. The “Automatically generate consecutive shipment numbers” checkbox must be activated for this.

With automatic consecutive number generation, you can choose whether to use the shipment numbers without any further actions or whether you should confirm each number generated after any changes in a dialogue. Set the option by placing or removing the tick in the checkbox.

If you want Global Mail PostKIT to warn you if a short name has not been assigned when a new address is created, select the relevant checkbox.

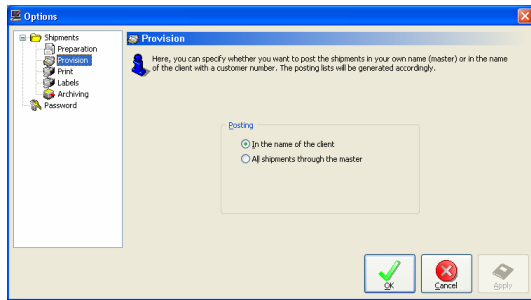


Shipment provision options

Here, you can specify whether you want to post shipments in shipment provision in your own name (master) or in the name of the client with its own customer number. The posting lists will be generated accordingly. Select the desired option field for this.

If you have changed the options, click on the “Apply” button to save the settings. Click on

“OK” to apply the changes and close the window.



Printing options

Here, you can set which print output is generated in shipment preparation and provision.

If you have changed the options, click on the “Apply” button to save the settings. Click on “OK” to apply the changes and close the window.

Print products for shipment preparation

If you want to print directly on the existing cash on delivery international inpayment money order with Global Mail PostKIT, please select the checkbox.

Then configure the necessary settings described below for the printer used.

To deactivate printing on a cash on delivery international inpayment money order, click on the selected checkbox so that it no longer contains a tick.

Print international advice of delivery

If you want to print advice of delivery documents, select the “International advice of delivery” checkbox.

Then configure the necessary settings described below for the printer used.

Select printer

You have the option of specifying the printer which is responsible for printing international advice of delivery documents and, independently of that, for the cash on delivery international money order. If “International advice of delivery” is selected, you can choose one of the printers installed for printing the advice of delivery documents in the combination field below the checkbox. If you want to use a different printer than previously for printing your forms, select it from the installed printers. If you select a new printer here, it will appear as the

selected printer next time you open the print screen. The printer to be used for the cash on delivery international inpayment money order can be selected once the checkbox has been selected.

Of course, all print products can be output on the same printer.

Set printer properties

If you want to change the printer properties of the selected printer, click on the relevant “Printer properties” button. The standard Microsoft Windows dialogue for printer properties will then open.

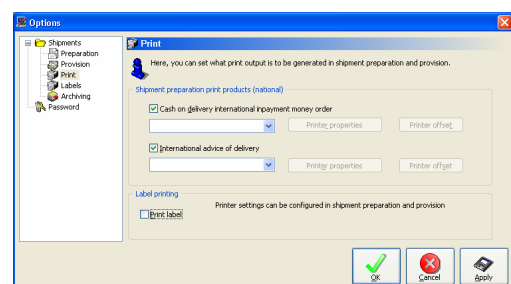
Set printer offset

To adjust the position of the printout on the forms, click on the “Printer offset” button.

Here, you have the option of adjusting the position of the printout in the “Horizontal” and “Vertical” directions, to take account of any printer inaccuracies.

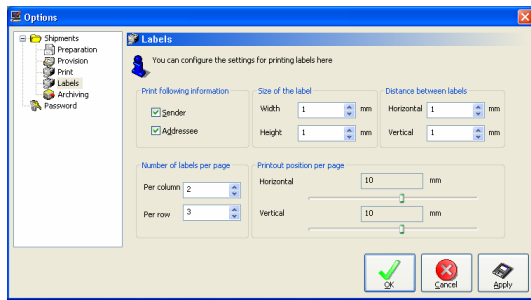
Label printing

If you want to print labels, select the “Print labels” option in the label printing area. You can find a detailed description on label printing in the Print label section in the shipment preparation section.



Options for the labels used

Global Mail PostKIT helps you to print on DIN A4 label sheets. Here, you can provide all the necessary information for describing the label sheet you use.



Print following information

By making specific selections in the “Sender” and “Addressee” fields, you can define the information to be printed on the labels.

Label size

Please enter the height and width of a label in millimetres here.

Spacing between labels

Please enter the horizontal and vertical distance between the labels in millimetres here.

Number of labels per page

Please enter the number of labels per column and row here.

Position of the printout per page

Here, you have the option of adjusting the position of the print-out in the “Horizontal” and “Vertical” directions, to take account of any printer inaccuracies.

Archiving options

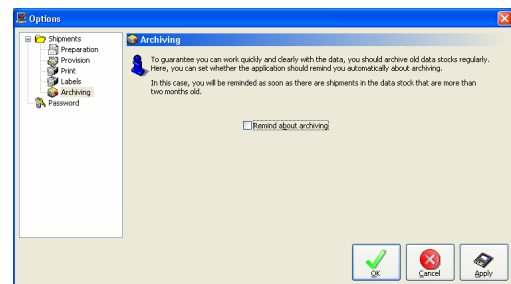
To guarantee you can work quickly and clearly with the data, you should archive old data stocks regularly. Here, you can set the application to remind you about this automatically. If you do so, you will be reminded as soon as there are shipments in your data stock which are more than two months old.

If you have changed the option, click on the “Apply” button to save the settings. Click on “OK” to apply the changes and close the window.

NB: Archiving data stocks should not be used to back up data. It is only designed to prevent the application from slowing down because of excessive data stocks. However, through dearchiving, you can neither integrate the archived data stocks in a Global Mail PostKIT installation on another PC nor on your own PC after Global Mail PostKIT has been

newly installed (e.g. because of continuing problems or application failures). To do this, use the various export functions in shipment management and in the address area.

The data saved in Global Mail PostKIT (addresses, shipments, etc.) is stored in the Global Mail PostKIT installation directory. Please back up this directory regularly so that you do not lose any data. If you have to set the system up again because of a fault, please firstly install Global Mail PostKIT as described above. Then replace the content of the Global Mail PostKIT installation directory with the backed up files. If you have any problems please contact the Global Mail PostKIT hotline.



17.2 Password

Here, you have the option of changing or assigning existing passwords if you have not already specified them in the initial configuration. In this way, you can protect Global Mail PostKIT against unauthorised access.

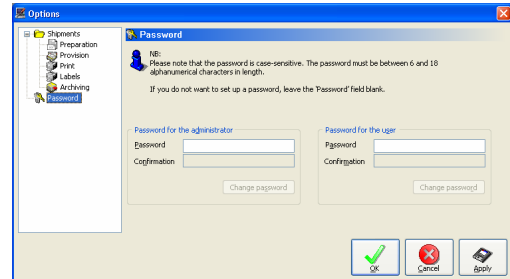
If you assign an administrator password, the password will be requested when some administrative Global Mail PostKIT functionalities are called up, such as changes to the options or Internet settings. If you do not assign an administrator password, these functions can be called up by users without administrator rights.

The user password is only requested when Global Mail PostKIT starts.

Enter the password and repeat it in the confirmation field. The password is case-sensitive and must contain 6 to 18 alphanumerical characters.

After you have entered it, click on the “Change password” button to submit the password. It will be effective immediately.

In all other respects, the passwords assigned here are independent of the user ID and password which are given to you for activation. These are relevant, for example, for accessing the online services in the special mail services area of Deutsche Post AG’s website.



18 Internet settings

In the Internet settings, which you can call up via the *Master data* → *Internet settings* menu, you can set how Global Mail PostKIT should establish an Internet connection to Deutsche Post's server.

The settings and procedure are the same as for the Internet wizard which is called up when you start Global Mail PostKIT for the first time and is described in the Internet wizard section.

19 General Global Mail PostKIT functionalities

In the next sections, general functionalities are described which may be used repeatedly in the various screens of Global Mail PostKIT and which are designed to make it easier for you to work with Global Mail PostKIT. In particular, they are functionalities for moving to entry fields, searching and finding addresses, and displaying tables.

19.1 Marking mandatory fields and fields with incorrect entries

Fields which contain invalid values are highlighted in yellow. Mandatory fields are yellow until a value is entered in them. Once a valid entry has been made in them, they turn white. Blank white fields are optional fields and do not have to be filled in.

19.2 Table properties

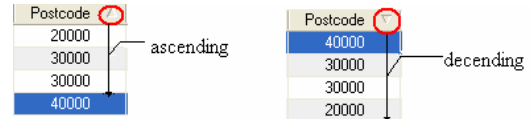
Change the column width of tables

In general you can change the size of the individual columns using the mouse. To do so, click on a separator until the mouse turns into a double-ended arrow. Then press the left mouse button down and drag the black line which appears in the desired direction, then release the mouse button at the desired place.

| Shipment | | Postcode | Status |
|------------------|----|----------|--------|
| Shipment no. | | | Code |
| RR 1111 1111 5DE | ch | | NV |
| RR 1111 1112 4DE | ch | | NV |
| RR 1111 1113 8DE | ch | | NV |
| RR 1111 1114 1DE | ch | | NV |
| RR 1111 1115 5DE | ch | | NV |
| RR 1111 1116 9DE | ch | | NV |
| RR 1111 1117 2DE | ch | | NV |
| RR 1111 1118 6DE | ch | | NV |

Sort shipments by table column

In general, you can sort tables by all table columns alphabetically and numerically in ascending or descending order. To do so, you simply have to click on the header of the column in question.



Change column arrangement

Within a table, you have the option of rearranging the columns using the drag and drop function. Click on the column which you want to reposition within the area. The column to be moved will be duplicated and shown in a semi-transparent form. Hold down the mouse button and drag the column to the desired position, which will be displayed by two green arrows. Then release the mouse button to reposition the column.

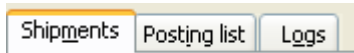
In our example, the “Posting” column is positioned to the right of the “ID” column in the table headed “Shipment”.

| Shipment | | | Status | |
|----------|-----------|------|--------|-----------|
| Code | Date | Post | Code | Comments |
| EL | 11/8/2005 | Post | EL | 11/8/2005 |
| EL | 11/8/2005 | Post | EL | 11/8/2005 |

NB: The columns can only be moved under the same table header. For example, the “Name” column from the table headed “Addressee” cannot be placed in the same area as the table headed “Sender”.

19.3 Keyboard navigation in tabs

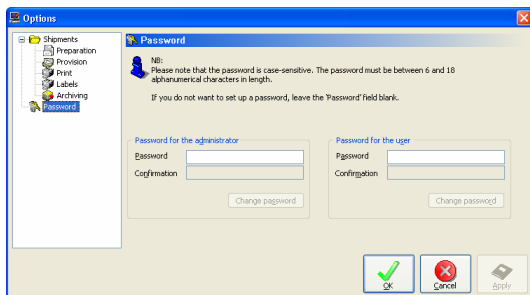
Individual tabs can be brought to the foreground using a keyboard shortcut (ALT + the underlined letter in the tab name). In addition, you can go through the tabs using the arrow keys (← and →) if the focus is on a specific tab. The tab is brought forward:



In the figure, the tabs were selected within shipment provision. The focus is on the “Shipments” tab. You can change the focus, using Alt + u for “Shipments”, Alt + f for “Posting list” and Alt + p for “Logs”.

Because it is possible to use the dialogue with the keyboard alone, preparing shipments is generally much more convenient, as it is not necessary to keep switching between the keyboard and mouse. This applies in particular if a lot of shipments have to be prepared where new addresses need to be recorded.

In all other respects, the passwords assigned here are independent of the user ID and password which are given to you for activation. These are relevant, for example, for accessing the online services in the special mail services area of Deutsche Post AG’s website.



20 Contact us

If you have questions or suggestions about this program version, please do not hesitate to contact us.
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