



e- LMS

Electronic Lodgement of Mailing Statements

User Guide
Version 4.8



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1 Welcome to e-LMS



1.1 Welcome to e-LMS help

Thank you for choosing e-LMS, Australia Post's online Mailing Statement solution.

e-LMS is the system you use to create and submit a Mailing Statement, track its progress, retrieve pricing details and enquire about your existing statements. To use e-LMS, you must have a valid Australia Post e-LMS account and be able to access the internet.

In this guide, you will find instructions on how to use this application.

1.2 Overview

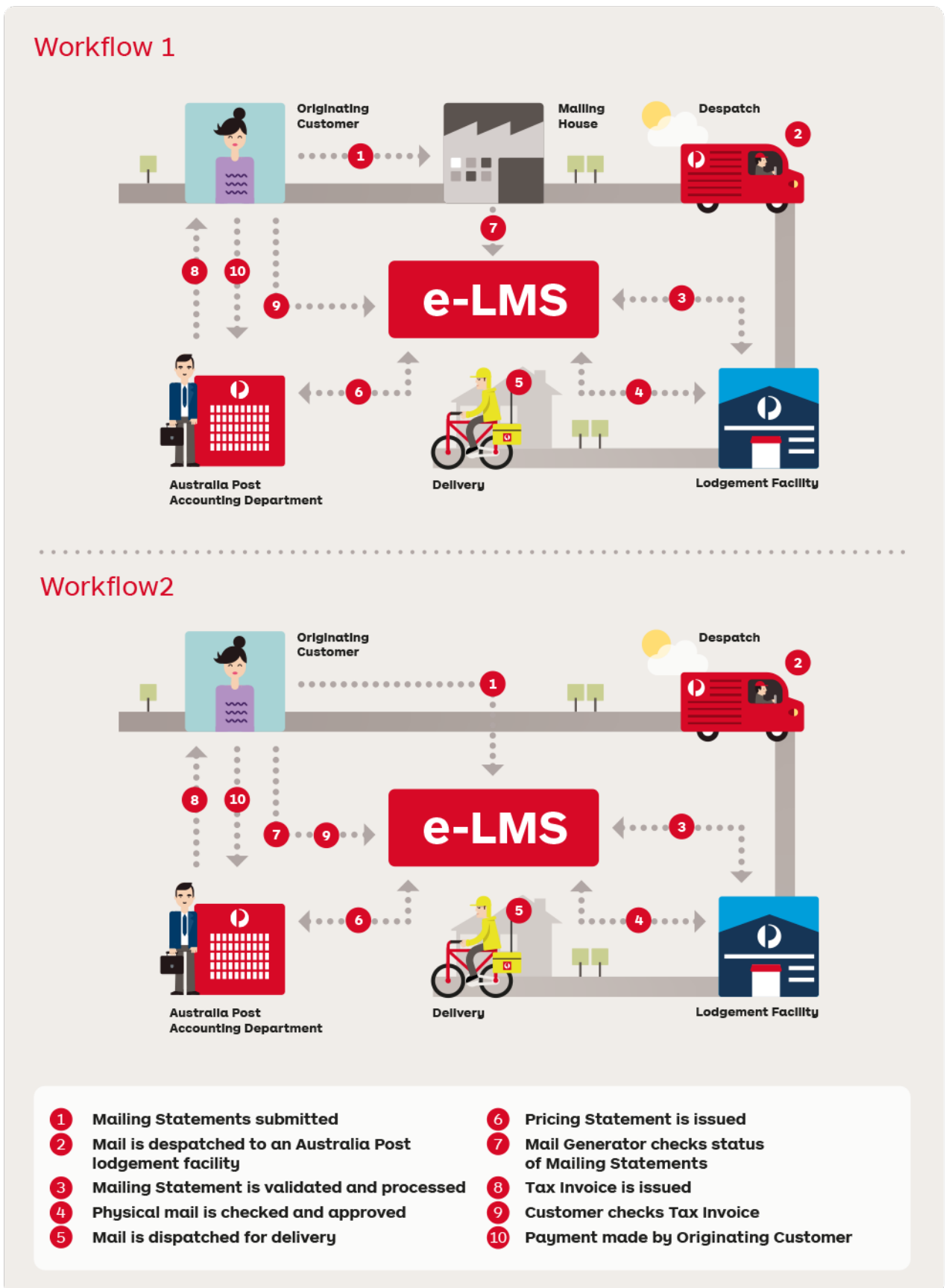
1.2.1 Overview of e-LMS

e-LMS (electronic Lodgement of Mailing Statements) is an electronic gateway to Australia Post, allowing Mail Houses and customers to lodge Mailing Statement information via a web-based application.

By using either direct entry or file transfer from the Mail House production control systems, e-LMS improves the efficiency of mail lodgement and account reconciliation. e-LMS is also used by Australia Post staff to expedite checking, costing, approving and invoicing of bulk mail services.

1.2.2 Workflow

e-LMS is the electronic hub for the tasks involved in lodgement of bulk mail. The physical and business processes involved in a typical e-LMS workflow are shown in the diagrams below:



1	Mailing Statements submitted	<p>Workflow 1</p> <p>If an Originating Customer has engaged a Mail Generator (MailingHouse) to lodge on their behalf, the Mail Generator will submit a Mailing Statement on the Originating Customer's behalf.</p>	<p>Enter the details of the mailing job in e-LMS, by selecting:</p> <ul style="list-style-type: none"> • Account number • Job details which can identify and track the job • Where the mail will be physically lodged
		<p>Workflow 2</p> <p>Mail Generators/Customer can submit their own Mailing Statements.</p>	<p>e-LMS allows the user to prepare draft Mailing Statements prior to lodgement. These are saved and can be edited and submitted when required.</p>
2	Mail is despatched to an Australia Post lodgement facility		
3	Mailing statement is validated and processed	<p>e-LMS has automated back-office functions that speed up the process of validating each Mailing Statement. This validation includes checking the details entered in the Mailing Statement and verification of the customer's account status.</p>	
4	Physical mail is checked and approved	<p>When the mail arrives at the acceptance point, the physical mail is checked against the corresponding Mailing Statement. If the mail matches the detail on the Mailing Statement, the job is approved for delivery, otherwise the Mailing Statement is marked as non-conforming, and may be rejected. The Mail Generator will be alerted about non-conforming mail whenever they log into e-LMS, and can view the status of all rejected jobs.</p>	
5	Mail is dispatched for delivery		
6	Pricing statement is issued	<p>Once the Mailing Statement has been validated, a Pricing Statement is issued by the Australia Post accounting system, upon which the customer will be invoiced.</p>	
7	Mail generator checks status of Mailing Statements	<p>At any stage during the lodgement process, the Mail Generator can view the status of all jobs, which may be in draft, pending approval, rejected awaiting re-submission or approved for delivery.</p>	
8	Tax invoice is issued		
		<p>Workflow 1</p> <p>e-LMS permits only the Originating Customer to verify the details of a Tax Invoice against the corresponding Mailing Statements and Pricing Statements.</p>	
9	Customer checks tax Invoice	<p>Workflow 2</p> <p>Mail Generator/Customer can verify the details of a Tax Invoice against the corresponding Mailing Statements and Pricing Statements.</p>	
10	Payment made by customer		

1.2.3 How safe is my information?

Australia Post takes security seriously. We have implemented security systems at all Australia Post facilities, including physical and data security measures designed to protect our resources and your information.

Please refer to the Australia Post Privacy Statement on page 2 of this document.

1.3 Using e-LMS

1.3.1 Your e-LMS account

To use e-LMS, you must have a valid account. Your account details are set up and maintained by the Australia Post e-LMS Support Consultants. Your account type will reflect the role your organisation plays in the workflow:

Mail Generator

As a Mail Generator, you will be able to create and manage Mailing Statements for your own jobs and jobs you perform on the behalf of your customers.

Originating Customer

As an Originating Customer, you will be able to view Mailing Statements that have been submitted on your behalf by a Mail House (Mail Generator). You will also be able to view Pricing Statements so that you can validate charges billed to your Australia Post charge accounts.

Account details

To open or change your e-LMS account

Contact Australia Post eCommerce Tech Support Support on **1800 028 361** or auspost.com.au/lodgement-techsupport

To add and remove your own charge accounts

Contact Australia Post eCommerce Tech Support Support on **1800 028 361** or auspost.com.au/lodgement-techsupport

To add and remove your customer's charge accounts

You must have Administrator privileges to maintain your customer's accounts on your account.

Users

Each account can have multiple users with independent logins. The list of users is maintained by your in-house e-LMS Administrator.

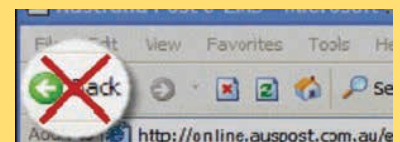
To add and remove users

You must have Administrator privileges to maintain users on your account.



Avoid the browser toolbar

When navigating between pages, avoid using your browser's toolbar. Use of the **Back** button in particular may give unexpected results.



1.3.2 Navigating around e-LMS

Navigation menu

To perform a particular task, you must first navigate your way to the page that provides the functions you need. The main tasks are displayed on the navigation menu, which appear as tabs across the top of the page.

This menu will change as you move around e-LMS. The tasks available from the navigation menu will depend on your current location and what you are doing on that page. For example, a related task may be shown as unavailable (grey) until you have completed your current task.



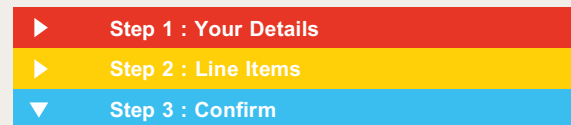
Red = Current task
Blue = Available task
Grey = Task is not currently available

To select a new task

- If available (blue tab), click the tab on the navigation menu corresponding to the task you want to perform.
- If not available (grey tab), you must complete the current task before you will be able to select that task.

Multi-step tasks

Tasks that cannot be fully displayed on a single page may be split into two or more steps. In multi-step tasks, an additional navigation menu will be displayed.



To proceed to the next step

Click the **Continue** button displayed at the bottom of the page.



You will not be permitted to proceed to the next step until you have successfully completed all mandatory fields on the current page. In this case, when you click the **Continue** button, the current page will be re-displayed highlighting the fields you need to complete or modify.

To return to a previous step

Click the navigation bar corresponding to the step you want to return to.

To complete the task

When you have reached the final step of the task and completed all the mandatory fields on that page, click the command button at the bottom of the page, for example:

The **Submit** button is displayed at step 3 of creating a new Mailing Statement.

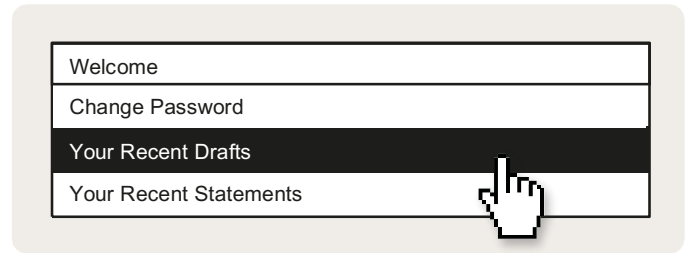
The **Continue** button will be displayed on all intermediate steps, except the final page.

1.3.3 Performing tasks

You perform tasks by selecting options, entering values and selecting commands from menus, fields and buttons on the current page.

Task menus

You may be given options relating to the current page on a submenu displayed on the left of the page, below the navigation menu. For example, on the Home Page, you can select from the following options:



Fields

Your task selections are made in fields, which may appear in several forms on the page:

Text box

Telephone number: *

Please use format (12) 34567890

To enter text in a text box

1. Click inside the box.
2. Type text and numbers into the box observing the notes displayed below the box.

When you have finished typing, check the text in the box before moving to another field. You can select another field with the cursor, or use the TAB key to move to the next field, or select a command button to perform the task.

Drop list

Account number: ▼

To select an option from a drop list

1. Click the list button on the right of the box. The list of available options will be displayed.
2. Select an option from the list with the cursor.

The selected option will be displayed in the box. You can now select another field with the cursor, or use the TAB key to move to the next field, or select a command button to perform the task.

Checkbox

Mail contains advertising material:

To select and clear a checkbox option

1. Click inside the checkbox with the cursor to select and clear the checkbox. The option is selected when a tick mark is displayed in the checkbox.



Mandatory and optional fields

Any field displayed in **bold** with a red asterisk (*) is mandatory and must be completed or selected before the current task or step can be completed. Other fields are optional and need only be selected if required.

Validation

Some fields may be validated to ensure the correct data has been entered, and all mandatory fields have been completed. If an error is detected, the page will be re-displayed with the fields that require your attention highlighted. For example:



Command buttons

To perform a task, you must click a command button. The button will be labelled with the command it will perform; for example, clicking **Print** will print the current page. You must complete all mandatory fields before selecting a command.

Other options available on the page

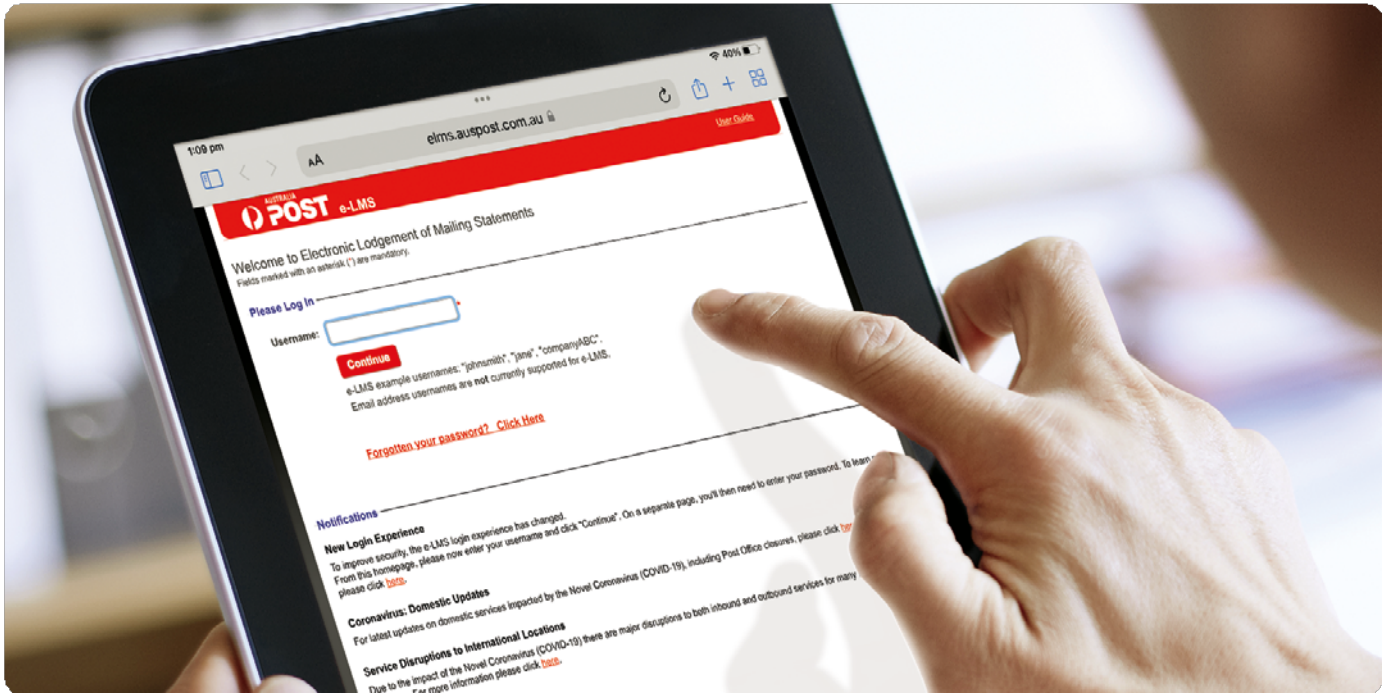
User guide

Click [user guide](#) to access the online user guide for information on this application.

Logout

Click [logout](#) to end your e-LMS session.

2 Getting started



2.1 Logging in

To use e-LMS, you must have a valid Australia Post e-LMS account.

1. In your internet browser, go to: <http://online.auspost.com.au/elms>
2. Login by entering your username and click [Continue](#).

Forgotten your username and/or password?

Select:

[Forgotten your password? Click Here](#)

on the login page as shown.

Follow the instructions in the email to reset your password. If you still experience difficulties, contact your in-house e-LMS Administrator for assistance or call Australia Post e-LMS Support on **1800 028 361**.

Welcome to Electronic Lodgement of Mailing Statements

Fields marked with an asterisk (*) are mandatory.

Please Log In

Username:

*

[Continue](#)

e-LMS example usernames: "johnsmith", "jane", "companyABC".
Email address usernames are **not** currently supported for e-LMS.

[Forgotten your password? Click Here](#)

Still having problems logging in?

1. Check that you have typed in the correct **Username** and **Password**.
2. If you are still having problems, your account may have expired, or may be suspended. A notification will appear on the login screen advising this. Please contact your credit officer.

2.2 Logging in with non-conformance issues

You will be alerted if any new statements have non-conformance issues. You must view and acknowledge the non-conformance issues before you will be permitted to proceed to your Home Page. A Mailing Statement with a non-conformance alert is approved for processing; however future orders may be rejected if these non-conformance issues are not rectified.

To view and acknowledge the non-conformance issues

1. Click the **View** button adjacent to that Mailing Statement.
Details of the statement and the non-conformance issues will be displayed.
2. Click **Acknowledge**.
3. Repeat until you have acknowledged all Mailing Statements with non-conformance issues.

2.3 Your Home Page

The following information will be displayed on your Home Page:

Your recent drafts

Recent statements that have been saved as drafts and have yet to be submitted.

Your open Progressive Statements

Recent statements that have been saved as drafts and have yet to be submitted.

Your recent approved & Invoiced Statements

Recent statements that have been finalised with a status of **Approved & Invoiced**.

From your Home Page, you can

- **Edit** and **Cancel** recent drafts.
- **View** recently finalised Mailing Statements.
- Use the navigation menu to locate the information and functions you need. Use the
- options menu to perform tasks, and to change your password.
- Click [user guide](#) to display online help.
- Logout.

2.4 Session time-out



As a security measure, you will be automatically logged out of e-LMS if your page is inactive for a period of time.

The time-out period is defined in your user profile and can only be changed by the system Administrator.

What happened to the Mailing Statement I was working on?

Your Mailing Statement will be saved as a draft, which you can continue editing the next time you login. No data will be lost.

What happens when I log in after a time-out?

The system will return you to your Home Page. If you were editing a Mailing Statement, the data will be saved in a draft.

Can I change the time-out period?

The time-out period is intended to protect both you and Australia Post from unauthorised use of your account. The length of the time-out period is specifically designed to cater for the needs of a typical user.

2.5 Blocked account



If you attempt to login with an invalid password, your user account will be blocked on the third attempt.

To re-activate a blocked account, you must contact your in-house e-LMS Administrator.

2.6 Change password

The rules for creating a password are:

- Must contain at least 8 characters and not longer than 32 characters.
- Passwords are case sensitive.
- You cannot re-use an old password.

To change your password

1. From the navigation menu, click **Home** . Your Home Page will be displayed.
2. From the task menu, click **Change My Password**. The Change Password page will be displayed. In the **Current**
3. **Password** field, type your current password.
4. In the **New Password** field, type your new password.
5. In the **Confirm New Password** field, type your new password again.
6. Click **Change Password** .

2.7 Logging out

To logout from this session, click [logout](#), which can be found at the top-right corner of every page.

3 Business procedures



3.1 Business procedures for Originating Customers

The business procedures and tasks related to bulk mail lodgements are listed below:

Business Procedure	Related e-LMS Tasks
Query the status of statement	Search for statements View a Mailing Statement Download and print a statement View audit trail
Statement is part of a progressive lodgement	View details of a progressive lodgement
Validate invoice	View a Pricing Statement Reconcile your account against lodgements Create reports Query your account

3.2 Business procedures for Mail Generators

The business procedures and tasks related to generating a Mailing Statement are listed below:

Business Procedure	Related e-LMS Tasks
Make a single lodgement	Create a new Mailing Statement Submit a statement Save and edit drafts Upload an XML statement Cancel a draft
Make a Progressive Lodgement	Rules for Progressive Lodgements: <ul style="list-style-type: none"> • Create a Progressive Mailing Statement • Add a statement to a progressive lodgement • Cancel a progressive lodgement
Mail is lodged at Lodgement Point	What happens when a statement is submitted?
Mail has non-conformance issues	Acknowledge non-conformance alerts
Mail job is approved	Check the status of a statement
Mail job is rejected	Reasons why mail may be rejected: <ul style="list-style-type: none"> • Check the status of a statement • Modify a rejected statement • Cancel a rejected statement • View audit trail
Query the status of a statement	Search for statements View a Mailing Statement View a Progressive Mailing Statement Download and print a statement View Audit Trail
Progressive Lodgement is completed	Close a Progressive Lodgement
Customer validates invoice	View a Pricing Statement

4 Managing your account



4.1 Managing your account

What do you want to do?

Create a new user

4.2

Maintain charge accounts

4.4

Maintain user accounts

4.3

Maintain customer names

4.5


4.2 Create a new user

You must login as Administrator to perform all user administration tasks. When the system adds a new user account, the information you supply will be checked to ensure all mandatory fields have been completed, and that the data is valid.

To create a new user

1. Click the **Home** tab.
2. From the task menu, click **Add User**.
The Create User page will be displayed.
3. Complete the user details in the displayed fields, as described in the table below.
4. Click **Save** .

The following information is displayed when creating a new user:

Field	Description
Customer	Your account details are displayed
User Details	Type the new user's details in the fields below
Username*	Type the user's username
First Name*	Type the user's first name
Last Name*	Type the user's last name
Address	Type the user's address
Phone	Type the user's phone number
Fax	Type the user's fax number
E-mail*	Type the user's email address
Authorisation Details	Select the role and other account details for this user in the fields below
Role*	Select from the available user roles
Default Lodgement State*	 This field will only be displayed if you are a Mail Generator The state where this user lodges mail
Start Date*	Select the date the user account will be available
End Date	Optional expiry date for this account
Active	This checkbox is used to block and unblock a user account
Password*	Type a temporary password. The user will be asked to change the password when they login
Confirm Password*	Type the password again

* Mandatory.

4.3 Maintain user accounts

You must login as Administrator to perform all user administration tasks.

To view and edit user details

Viewing and editing a user's details is a multi-step task.

1. Click the **Home** tab.
2. From the task menu, click **Modify User**. The Modify User page will be displayed.
3. Type the user's details in one or more of the search fields:
Username - the user's e-LMS username
First Name
Last Name
4. Click **Search** .
5. Summary details for each user that match your search criteria will be displayed to help you identify the user. Click the **Username** of the user you want to modify. The details of the selected user will be displayed.
6. Make the changes required. For information about the fields displayed on this page, see the table below.
7. Click **Save** .

To block a user account

Viewing and editing a user's details is a multi-step task.

1. Click the **Home** tab.
2. From the task menu, click **Modify User**. The Modify User page will be displayed.
3. Type the user's details in one or more of the search fields:
Username - the user's e-LMS username
First Name
Last Name
4. Click **Search** .
5. Summary details for each user that match your search criteria will be displayed to help you identify the user. Click the **Username** of the user you want to modify. The details of the selected user will be displayed.
6. To block the user's account, select the **Inactive** checkbox (a tick mark is displayed).
7. Click **Save** .

To unblock a user account

Viewing and editing a user's details is a multi-step task.


1. Click the **Home** tab.
2. From the task menu, click **Modify User**. The Modify User page will be displayed.
3. Type the user's details in one or more of the search fields:
Username - the user's e-LMS username
First Name
Last Name
4. Click **Search** .
5. Summary details for each user that match your search criteria will be displayed to help you identify the user. Click the **Username** of the user you want to modify. The details of the selected user will be displayed.
6. Clear the **Inactive** checkbox (the checkbox is empty).
7. In the **New Password** field, type a new, temporary password.
8. In the **Confirm Password** field, type the password again.
9. Click **Save** .

To reset the user's password

Viewing and editing a user's details is a multi-step task.

1. Click the **Home** tab.
2. From the task menu, click **Modify User**. The Modify User page will be displayed.
3. Type the user's details in one or more of the search fields:
Username - the user's e-LMS username
First Name
Last Name
4. Click **Search** .
5. Summary details for each user that match your search criteria will be displayed to help you identify the user. Click the **Username** of the user you want to modify. The details of the selected user will be displayed.
6. In the **New Password** field, type a new, temporary password.
7. In the **Confirm Password** field, type the password again.
8. Click **Save** .

The following information is displayed on the page:

Field	Description
Customer	Your account details are displayed
User Details	Type the new user's details in the fields below
Username*	Type the user's username
First Name*	Type the user's first name
Last Name*	Type the user's last name
Address	Type the user's address
Phone	Type the user's phone number
Fax	Type the user's fax number
E-mail*	Type the user's email address
Authorisation Details	Select the role and other account details for this user in the fields below
Role*	The user's role determines the user's authorisation level. For more information on roles and permissions, refer to the relevant topics in the online user guide.
Default Lodgement State*	 This field will only be displayed if you are a Mail Generator The state where this user lodges mail
Start Date*	The date the user account will be available
End Date	Optional expiry date for this account
Inactive	This checkbox is used to block and unblock a user account. If you are unblocking an account, you must also reset the password
New Password	To reset the user's password, type a temporary password. The user will be asked to change the password when they login
Confirm Password*	Type the password again

* Mandatory.

4.4 Maintain charge accounts

You must be logged in as the e-LMS Administrator to maintain charge accounts. Two lists of account numbers are maintained on a Mail Generator account:

Your own Australia Post charge account numbers

When creating Mailing Statements, these are referred to as **Your Accounts**. Only authorised Australia Post personnel are permitted to maintain these accounts.

Your customer's Australia Post charge account numbers

When creating Mailing Statements, these are referred to as **Your Customer's Accounts**. Your in-house e-LMS Administrator is permitted to maintain these accounts.

When you add an account, the system will check the account details before it is added to the list of available accounts in the **Active Accounts** list box. Accounts listed in the **Pending Accounts** list box are awaiting confirmation from the system. If the system fails to validate the account, it will be listed in the **Error Accounts** list box.



Accounts added to the **Pending Accounts** list may not be available until the next business day. After adding a customer charge account number, you should also add the customer's name.

4.4.1 Accounts

The Australia Post charge accounts of your customers are displayed.

To add and remove your customer's charge account numbers

1. Click the **Home** tab.
2. From the task menu, click **Maintain Account**.
The Maintain Account Numbers page will be displayed.

The charge account numbers available on your account are displayed in the **Active Accounts** list box.

To add a new charge account number

Type the number in the **Account Number** field, and click **Add**.

When you add an account, the system will check the account details before it is added to the list of accounts. This may take overnight to complete.

To remove a charge account number

Select the account you want to remove in the Active Accounts list box, and click **Remove**.

- To select a group of accounts, hold down the SHIFT key.
- To select multiple accounts, hold down the CTRL key.
- To clear your selection, click a different account number.

When you have finished maintaining account numbers, select another task from the menu, or logout.


To add and remove your own charge account numbers

Contact Australia Post e-LMS Support on **1800 028 361** or email:
eLMSSupport@auspost.com.au


4.5 Maintain customer names

You must be logged in as the e-LMS Administrator to maintain customer names. When you create a new Mailing Statement, you can select the Originating Customer name from a drop-down list. The names displayed in this list are maintained by the Customer Names administration function.

To add a customer name

1. From the task menu, select **Customer Names**.
2. In the **Add Customer Name** field, type the customer name and click  .
The name will be displayed in the **Customer Names** box.

To remove a customer name

1. From the task menu, select **Customer Names**.
2. In the Customer Names box, select the customer name and click  .
The page will refresh with the name removed.

5 Generating Mailing Statements



5.1 Generating Mailing Statements

The details of your order must be specified in a Mailing Statement. This provides the information needed to price the mail services provided and to identify and track the mail job.

What do you want to know about?

Creating Mailing Statements

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Progressive Mailing Statements

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5.2 Creating Mailing Statements

5.2.1 Creating Mailing Statements

What do you want to do?

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5.2.2 Create a new Mailing Statement

From the navigation menu, click **New Mailing Statement**. Creating a new statement is a multi-step task. You must at least complete all the mandatory fields (*) before proceeding to the next step. The following information is displayed at each step in the statement:

Step 1: Your details

Generating customer

Your details are displayed. This information is supplied by the system and cannot be changed here.

Generating user

The details of the person creating the Mailing Statement are displayed. This information is supplied by the system and cannot be changed here.

Job reference

The following information is needed for billing and to help you identify the Mailing Statement when you search, view and print statements.



The fields displayed on the page will reflect the tasks you are authorised to perform. For example, the Progressive Mailing Statement field will only be displayed if you are authorised to make Progressive Lodgements.

Mailing Statement

1. Select the charge account number this order will be billed to.
2. Click the drop list button to display the available accounts.
3. Select from either the list of **Your Accounts**, or from the list of **Your Customer's Accounts**.
4. For details on **Progressive Mailing Statements** refer to section 5.3.



You can only select from the accounts displayed in this list. You have the option to create a single lodgement, or to add the new statement to a Progressive Mailing Statement.

If you are creating a single lodgement

In the **Progressive Mailing Statement** field, select **No (Single Lodgement)**.

To add the statement to an existing Progressive Mailing Statement

In the **Progressive Mailing Statement** field, select from the list of existing Progressive Mailing Statements.

To add the statement to a new Progressive Mailing Statement

In the **Progressive Mailing Statement** field, select **Create New Progressive MS**.

Account number

1. Select the charge account number this order will be billed to.
2. Click the drop list button to display the available accounts.
3. Select from either the list of **Your Accounts**, or from the list of **Your Customer's Accounts**. You can only select from the accounts displayed in this list.

Originating Customer name

If this job is being submitted on behalf of one of your customers (you chose an account from **Your Customer's Accounts**), the Originating Customer's name will be displayed.

If this is your own job (you chose an account from **Your Accounts**), your business name will be displayed plus any Customer names that have been added to your Customer's profile.

Unique ID

Type a unique job identifier on which you can search for this order in the database.

Job number

Type your job reference number.

Job name

Type the name of the job.

Invoice reference details

Type additional reference information. Lodgement Details.

Lodgement point

1. Select the charge account number this order will be billed to.
2. Click the drop list button to display the available accounts.
3. Select from either the list of **Your Accounts**, or from the list of **Your Customer's Accounts**. You can only select from the accounts displayed in this list.
4. Click the drop list button and select from the list of available Lodgement Points. You can only select from the locations displayed in this list.

Step 2: Line items

The items currently added to this statement are displayed in the **Line Items** section at the bottom of the page. You can add items with multiple product types on the same Mailing Statement.

To add a new line item

1. In the **Add New Article** section, from the **Product Grouping** list box, select the product type. Article types applicable to the select product type will be displayed.
If a cubing relevant product is requested, a link to the **Cubic Weight Calculator** displays.
2. Click **Cubic Weight Calculator**. The Cubing Calculator window displays.
3. Complete the fields.
4. Click **Calculate**. The cubic weight is calculated and displayed.
This can then be used to populate the weight field in the previous screen.
5. Click **Close** to continue.
6. From the **Article Type** list box, select the type of article. The lodgement conditions and contracts applicable to the selected article type will be displayed.
7. If displayed, read the **Lodgement Conditions**.
8. From the **Select Contract** drop down box, select either **Full Rate** or a **Contract** from the list. Only contracts applicable to the product type at the selected lodgement point will be displayed.



If the line item is lodged on Full Rate pricing, the text **Full Rate** will not appear on the Pricing and Mailing Statement. However, if lodged using a **Contract**, then the **Contract Number** is included on the Pricing and Mailing Statement.

If there is a **Contract** to lodge for a product/account/lodgement point combination, the **Select Contract** drop down box is replaced by the **Select Contract** or **Full Rate** drop down box. If there are no contracts to lodge the article, the drop down box does not display.

9. Answer the questions displayed specific to the selected contract or product.
10. In the **Number of Articles** table, type the number of articles corresponding to the categories shown. You can make multiple entries in this table.
11. For **Internal Chargeback**, select the **Chargeback Cost Centre** from the list to link the article.
12. If **Recipient Notification** is selected, a file containing a list of all articles and the relevant recipient notification details (including article ID, recipient email, mobile number, delivery postcode), must be uploaded as part of the Mailing Statement confirmation process.
13. Check the details you have typed and click **Add this Article**.
The page will refresh with the new item displayed in the **Line Items** section.
14. Repeat steps 1 to 7 until you have added all items required on this statement.

To change a line item quantity

1. In the **Line Items** section, click **Modify Quantity**.
 2. Change the number of articles in the **Quantity** field.
 3. Click **Save**.
- The page will refresh with the new item quantity displayed in the **Line Items** section.

To delete a line item

In the **Line Items** section, click **Delete** next to the item you want to delete. The page will be refreshed with the item removed.

Step 3: Confirm

The details you have entered will be displayed. Please check that the details you have entered on this statement are correct, taking note of the **Lodgement Conditions** for each type of product, and carefully read the **Customer Certification** before submitting this statement.



Lodgement Conditions and Disclaimer Text are only displayed during Mailing Statement creation. When the Mailing Statement is accessed via a search, this text does not appear on the Mailing Statement.

To upload a Notification File

If you have selected any product that includes optional tracking notifications and you have selected **Y** for Recipient Notification in the Mailing Statement you must upload a file containing the article and notification details. Select **Choose File** to upload the file. Note that the number of notification records must match the total number of articles selected.

5.2.3 Notification File

Optional tracking notifications are available for selected products. If you have selected a product with optional tracking notifications, and selected **Y**, you will be required to upload a Notification File. Please note that for tracking notifications to be available, articles must be prepared to product specifications.

5.2.3.1 What is the purpose of the Notification File?

To request tracking notifications for applicable products, a Notification File must be uploaded in CSV format and submitted with a Mailing Statement. The Notification File will include; article ID and barcode article numbers, sender and receiver details including phone, email and delivery postcode information. Refer to section 5.2.3.2 further for file format and fields required.

5.2.3.2 Notification File Format and Content

To upload a Notification File the file should be in CSV format with the following fields:

Attribute	Description	Type (Len)	Mandatory	Validation Rules /Additional Details
Article Number	Article ID / Number on the article	Varchar (25)	Y	Article ID must be Length 25 Sample: TMABC12300408123456789091
Barcode Data	Data string encoded in GS12D barcode on the article	Varchar (79)	Y	Barcode length can be up to 79 Sample: 019934976611112991TMABC12300408123456789091 4203000 9200000001 8008191016144500  The GS1 standard bar code data string includes non- printable characters, which must be replaced with the pipe () symbol
Notification (Y/N)	Yes or Noto receive notifications for listed article	Boolean	Y	Mandatory to indicate if the notification is required for the article or not.
Sender	Optional Senderof the Article	Char (35)	N	If this field is empty then use the Sender Name as per Customer Reference on Article ID.
Description	Optional description information on the article	Char (50)	N	Sample: Article for Joan
Name	Notification Receiver Name	Char (35)	Y Conditional	Mandatory if notification flag is set to Y. Sample: Joan Smith
Company Name	If article has a company namefor receiver	Char (50)	N	Sample: Joan's Company
Postcode	Postcode where the article is being sent to	Char (4)	Y Conditional	Mandatory if notification flag is set to Y. This postcode is to be used for EDD.
Mobile Phone Number	Notification Receiver Mobile Number	Char (30)	N	Must be Australian mobile number. International numbers or landlines are not acceptable. Sample: 0400026551
Email Address	Notification Receiver Email Address	Char (240)	Y Conditional	Mandatory if notification flag is set to Y. Checking for standard email validations only. Sample: joansmith@gmail.com

 **Here is a sample of three article entries in a Notification File – notifications are requested for the first two (a and b) and notification are not requested for the third (c):**

- a. RPE277295801000930805,019934976611112991RPABC12300408123456789091|42030060200000001|8008191016144500,Y,"ABCD","Article for Joan","Joan Smith","Joan's Company",2000,0400000000,"SampleUser1@gmail.com"
- b. TMABC12300408123456789093,019934976611112991TMABC12300408123456789093|4203000|9200000001|8008191016144500,Y,"ABCD","Article for Jack","Jack Smith","Jack's Company",3000,0400000000,"SampleUser2@gmail.com"
- c. TMABC12300408123456789091,019934976611112991TMABC12300408123456789091|4203000,N,null,null,null,null,null,null,null

5.2.3.3 Why has my Notification File been rejected?

Warning messages may appear if an error has been identified with the Notification File once uploaded and validated. For example, if information is missing or the email address provided is invalid. To proceed with submitting the Mailing Statement any errors identified within the file must be resolved before the Mailing Statement is submitted. Proceeding without resolving identified errors may result in notifications not being received.

A Notification File may be rejected for any of the following reasons:

- a. The number of articles supplied in the Notification File does not match the number of articles declared on the Mailing Statement. If notifications are requested for one or more line items within the Mailing Statement the number of article IDs in the Notification File must match. All article IDs are required in the file even in the event only some articles require notifications.
- b. Errors are detected during validation of the Notification File. If **Notification (Y/N)** field for the article is **Y**, any of the following issues may result in rejection of the Notification File:
 - i. Recipient name not provided
 - ii. Delivery postcode not provided
 - iii. Email address not provided
 - iv. Invalid email address
 - v. Invalid mobile phone number (noting landline and international numbers are not compatible for notifications to be received).

5.2.3.4 Other notification considerations

- a. In order to ensure notifications received are correct it is important to ensure article and barcode numbers provided in the Notification File match the details affixed to the article lodged
- b. Article IDs cannot be reused, doing so may result in duplicated notifications being received
- c. Once the Mailing Statement has been submitted Notification File details provided cannot be changed.

5.2.4 Submit a Mailing Statement

On the third and final step of creating a new Mailing Statement, you will be asked to confirm the details of your order. When you click **Submit**, the status of the statement changes from **Draft** to **In Progress** and the statement is submitted for a series of checks. These checks will identify if there are any inconsistencies in the statement or the physical mail.



At the time of creation and submission of a Mailing Statement that contains a line item with a unit price equal to or below a system parameter lower limit, or equal to or greater than a system parameter upper limit, the Mailing Statement has a status of **Pricing Check Required**. These statements are investigated by the Australia Post e-LMS Support consultants who can:

Review and validate the potentially invalid price in SAP, then submit the Mailing Statement to SAP for re-pricing. The Mailing Statement is then moved to the status of **Awaiting Approval**.

Lodgement point staff should contact the Australia Post e-LMS Support consultants to initiate this process.

5.2.5 Save and edit a draft Statement

While you are creating a Mailing Statement, you can click **Save Draft** at any time and return to the statement later.

To edit a draft

1. Click the **Home** tab.
2. Locate the draft from the list of **Your Recent Drafts**.
3. Click the **Edit** button next to the draft you want to edit.

If the statement you want is not listed

1. Click the **Search** tab.
2. Search for Mailing Statements with a status of **Draft**.
3. From the Search Results page, in the **MS#** column, click the statement you want to edit. The draft will be displayed.
4. Click **Edit Draft** .

5.2.6 Cancel a draft

You can cancel Mailing Statements that have the status of either **Draft** or **Rejected**.

To cancel a recent draft statement

1. Click the **Home** tab.
2. Locate the draft from the list of **Your Recent Drafts**.
3. Click the **Cancel** button next to the draft you want to cancel.

To cancel any draft or rejected statement

1. Click the **Search** tab.
2. Search for Mailing Statements with a status of **Draft** and/or **Rejected**.
3. From the Search Results page, in the **MS#** column, click the statement you want to edit. The statement will be displayed.
4. From the View Mailing Statement page, click Summary details of the statement will be displayed.
5. Type any additional information in the **Comments** field.
6. Click **Cancel this Statement** .

5.3 Progressive Mailing Statements

5.3.1 Progressive Mailing Statements

You can use a Progressive Mailing Statement to group Mailing Statements created successively for the same job on the same charge account. The Progressive Mailing Statement collects the details from all the statements in the batch and provides you with a progressive report on the entire mail job.

The Mailing Statements contained in the batch are otherwise processed and billed like any other statement.

The tasks described below will only be displayed in e-LMS if you are authorised to make Progressive Lodgements.

What do you want to know about?

Rules for Progressive Lodgements 5.3.2

What do you want to do?

Create a Progressive Mailing Statement 5.3.3

Close a Progressive Mailing Statement 5.3.5

Add a Statement to a Progressive Mailing Statement 5.3.4

Cancel a Progressive Mailing Statement 5.3.6

5.3.2 Rules for Progressive Lodgements



These business rules must be applied by e-LMS users and are not necessarily enforced by the system.

The following rules and guidelines must be observed when making Progressive Lodgements:

- Progressive lodgements can only be made by authorised customers.
- You must create a new Progressive Mailing Statement for each product code. Mailing Statements in the same progressive batch must use the same product code.
- The Progressive Mailing Statement must be closed manually by the customer after 30 days. The number of days the Progressive Mailing Statement has been open will be displayed when you view the statement.
- The customer must advise the Australia Post Lodgement Point recorded on the statement when each Progressive Mailing Statement is closed.

5.3.3 Create a Progressive Mailing Statement

When you create a new Mailing Statement, you are given the option to:

- Create a single lodgement (the statement will not be added to a Progressive Mailing Statement), or
- Add the statement to an existing Progressive Mailing Statement, or
- **Create a new Progressive Mailing Statement.**

When creating a new Mailing Statement, in the **Progressive Mailing Statement** field, select **Create New Progressive MS**.



When you create a new Progressive Mailing Statement, you must specify the name of the Originating Customer, the charge account number, the Lodgement Point and other information that is common to all Mailing Statements in the Progressive Mailing Statement.

When you subsequently add further statements to a Progressive Mailing Statement, these details cannot be edited. The only reference field that can be edited in a Progressive Mailing Statement lodgement is the Unique ID.

5.3.4 Add a statement to a Progressive Mailing Statement

When you create a new Mailing Statement, you are given the option to:

- Create a single lodgement (the statement will not be added to a Progressive Mailing Statement), or
- **Add the statement to an existing Progressive Mailing Statement**, or
- When creating a new Mailing Statement, in the **Progressive Mailing Statement** field, select from the list of existing Progressive Mailing Statements, or
- Create a new Progressive Mailing Statement.



Alternatively, from your Home Page, in the **Your Open Progressive Mailing Statements** section, select the **Add MS** button adjacent to the Progressive Mailing Statement you want to add the new statement to. The New Mailing Statement page will be displayed with the selected Progressive Statement No. displayed in the **Progressive Mailing Statement** field. You can also add statements when you view a Progressive Mailing Statement.

When you add statements to a Progressive Mailing Statement, the account information, job details, lodgement point and product code cannot be edited, as these details are common to all statements in the batch.

5.3.5 Close a Progressive Mailing Statement

Progressive Mailing Statements must be closed every 30 days. The timing will depend on your own billing cycle and in-house reporting needs. Progressive Mailing Statements must be closed manually by the Mail Generator.



You must advise the Australia Post Lodgement Point recorded on the statement when each Progressive Mailing Statement is closed.

When you view a Progressive Mailing Statement, you can close the Progressive Mailing Statement by clicking the **Finalise** button. This command button will only be available if all statements contained in the batch have reached the status of **Approved & Invoiced, Reversed** or **Cancelled**.

Once closed, you can locate a Progressive Mailing Statement (and summary Pricing Statement) from the Search page, or by viewing the audit trail of any of the original Mailing Statements in that batch. The Mailing Statements contained in a Progressive Statement are billed progressively and individually, as they are finalised, like any other Mailing Statement. The summary Pricing Statement is provided for reporting purposes only.

5.3.6 Cancel Progressive Mailing Statements

When you view a Progressive Mailing Statement, you can cancel the Progressive Mailing Statement by clicking the **Cancel** button. This command button will only be available if all statements contained in the batch have the status of **Cancelled**.

To cancel a Mailing Statement

1. Click the **View** button adjacent to the statement you want to cancel.
2. From the View Mailing Statement page, click Summary details of the statement will be displayed.
3. Type any additional information in the **Comments** field.
4. Click **Cancel this Statement**.

5.4 Approval of Mailing Statements

5.4.1 Approval of Mailing Statements

Mailing Statements are subjected to various system and manual checks before they are approved for delivery and can be finalised.

What do you want to know about?

What happens when I submit a Mailing Statement? 5.4.2

Who can approve a Mailing Statement? 5.4.4

Why has my Mailing Statement been rejected? 5.4.3

5.4.2 What happens when I submit a Mailing Statement?

When you submit a Mailing Statement, the status of the statement changes from **Draft** to **In Progress** and a number of automated system checks are performed. If the statement passes these checks, a Pricing Statement is generated by the Australia Post accounting system, and the status changes to **Awaiting Approval**. The Pricing Statement reflects the details of the statement, and is the basis on which the service will be invoiced.

If there are problems with any of the system checks, the statement will either remain **In Progress** until the problems are resolved, or, the statement will be **Rejected**. The reasons for rejection will be recorded and can be viewed from the audit trail.

When you dispatch the physical mail to the nominated Lodgement Point, additional manual checks will be performed to ensure that the physical mail matches up with the details in the Mailing Statement, and hence the correct price is charged for the service. If the mail passes the manual checks, the status of the statement will then change to **Approved & Invoiced**. If there are problems with any of these checks, the order may be rejected, and will show a status of **Rejected**. The reasons for rejection will be recorded and can be viewed from the audit trail.

The statement may also be approved with non-conformance issues. In this case, the Mail Generator or agent will be alerted to these issues, but the order will still be processed.

The other possible status values include:

On hold

The order is being held, usually at the request of the customer, for operational or logistical reasons.

Approved awaiting EPOS pricing

The order requires payment to be made before it can be finalised.

Reversed

An approved statement has been reversed either because the mail was never lodged, or because the wrong customer account was used on the original order.

Cancelled

The order has been cancelled by, or at the request of, the customer.

5.4.3 Why has my Mailing Statement been rejected?

A Mailing Statement may be rejected due to errors with addressing the physical mail, use of an ineligible product category, differences in declared and actual values, or exceeding the credit limit on the Originating Customer's account. You can view the rejection reasons from the audit trail.

Any one of the following issues may result in rejection of a Mailing Statement:

Addressing errors	
Failed CBQA test	Barcode data not matching address Barcode on tray label fails Barcode unreadable Failed dimensional analysis only Incorrect/not updated sort plans
Incorrect addressing	Address block Address format and font Barcode clear zone
Product category errors	
Delivery zone	Declared higher pricing than actual delivery zone Declared lower pricing than actual delivery zone
Incorrect PreSort category	Direct Tray declared Other State is Same State Direct Tray declared Same State is Other State Not eligible for Direct Tray Not eligible for PreSort
Incorrect Print Post category	Insufficient volume Not eligible for LPD Not eligible for Print Post Service Not eligible for SPD
Not eligible for Clean Mail	Insufficient volume Not machine addressed Plastic wrapped
Service delivery	Declared airmail but actual is surface mail Declared higher pricing than actual service Declared lower pricing than actual service Declared surface mail but actual is airmail
Size/weight/thickness/shape	Declared at higher pricing than actual category Declared at lower pricing than actual category
State categories	Declared higher pricing than actual Declared lower pricing than actual
Credit Limit Problems	
If lodged on your own account, contact your Australia Post account representative	
If lodged on your customer's account, advise the customer to contact their Australia Post account representative	

5.4.4 Who can approve a Mailing Statement?

Permissions have been specifically set so that the person who creates the Mailing Statement cannot approve it. You must be logged in as either an Outstation Approver or a BC Approver to approve or reject statements.

5.5 Dealing with rejected statements

5.5.1 Dealing with rejection

Mail Statements may be rejected due to errors in the Mailing Statement, or in the physical mail. You must take an appropriate action before a rejected Mailing Statement will be processed.

Reasons for rejection

If the reason for rejection is a product category error

You can either correct the Mailing Statement or cancel it. You must locate the Mailing Statement from the Search page, from where you can view, edit, resubmit or cancel it. You do not have to make corrections now, but a rejected Mailing Statement will not be processed until it has been corrected and re-submitted.

If the reason for rejection is an addressing error

You must contact the Business Centre where the mail was lodged.

If the reason for rejection is related to the credit limit on the customer's charge account

You must contact your Australia Post account representative.

To search for rejected Mailing Statements

1. Click the **Search** tab.
2. Search for Mailing Statements with a status of **Rejected**.
3. From the Search Results page, in the **MS#** column, click the Mailing Statement you want to view.

To view rejection reasons

1. From the View Mailing Statement page, click **View Audit Trail**.
2. Locate the audit trail record that records the rejection.
3. The rejection reasons will be listed in the **Details** column.

To modify and resubmit a rejected Mailing Statement

1. From the View Mailing Statement page, click **Modify Rejected**.
2. Make the corrections required.
3. In the final edit page (Step 3. Confirm), click the **Submit** button.

To cancel a rejected Mailing Statement

1. From the View Mailing Statement page, click Summary details of the statement will be displayed.
2. Type any additional information in the **Comments** field.
3. Click **Cancel this Statement**.

5.5.2 Check the status of Mailing Statements

The status of a Mailing Statement will tell you the stage the order has reached in the lifecycle of the statement. To identify the status of statements, you must search the database for the statements you want to check.

To check the status of Mailing Statements

1. Click the **Search** tab.
2. Select search criteria that will identify the statements you want to find. For example, type the **Unique ID** for an order, or search for multiple statements by date range with the **From Date** and **To Date** fields. You can use more than one search criteria.
3. Click **Search**.
4. The status of statements found by your search will be displayed in the **Status** column. To identify why a statement has been rejected, view the audit trail.

5.5.3 Modify a rejected Mailing Statement

If a Mailing Statement has been rejected, you must locate the statement, modify it and resubmit it. When you resubmit the amended statement, the status will change from **Rejected** to **In Progress**. The resubmitted statement will then be re-checked before it can be approved.



Any rejected statements that are over a month old will be automatically cancelled by the system.

To locate, modify and resubmit a rejected statement

1. Click the **Search** tab.
2. Search for Mailing Statements with a status of **Rejected**.
3. From the Search Results page, in the **MS#** column, click the Mailing Statement you want to edit. The Mailing Statement will be displayed.
4. Click **Modify Rejected**.
5. Make the corrections required.
6. For the final edit page (Step 3. Confirm), click the **Submit** button.

5.5.4 Cancel a rejected Mailing Statement

To cancel a rejected Mailing Statement, you must first locate the statement you want to cancel. When you cancel a rejected statement, the status will change from **Rejected** to **Cancelled**.

Cancelled statements are not deleted from the database, and can be searched for and viewed like any other statement.



Any rejected statements that are over a month old will be automatically cancelled by the system.

To locate and cancel a rejected statement

1. Click the **Search** tab.
2. Search for Mailing Statements with a status of **Rejected**.
3. From the Search Results page, in the **MS#** column, click the Mailing Statement you want to cancel. The Mailing Statement will be displayed.
4. Click **Cancel this Statement**.
5. Type any additional information in the **Comments** field.
6. Click **Cancel this Statement**.

6 Searching for Mailing Statements



6.1 Searching for Mailing Statements

Mailing Statements are stored in the e-LMS database, which you can access from the **Search** page.

What do you want to do?

Find Mailing Statements

6.2

Downloading and Printing

6.5

View Mailing Statements

6.3

View Mailing Statement audit trail

6.6

View a Progressive Mailing Statement

6.4

6.2 Find Mailing Statements

You can search for and view any statement, including drafts, statements that are being processed, and statements that have been finalised. You must select search criteria to locate the statements you want; for example, you can search for all rejected statements, or use the Unique ID to find a particular statement.

6.2.1 Using multiple search criteria

When you use more than one search criteria, the statements found by the search will match all criteria. For example, if you specify:

From Date: 01/06/2015

To Date: 30/06/2015

Status: Approved & Invoiced

Leave all other criteria blank, the search will locate only those statements that are finalised and were submitted in the month of June 2015.

Search criteria

The following criteria are available from the Search page:

Field	Description
Generating Customer Name	The business name of the Mail Generator that created and submitted the statements
From Date	Locates statements that were submitted on or after this date
To Date	Locates statements that were submitted on or before this date
Lodgement State	The State where the statement was lodged
Lodgement Point	The Mail Centre where the statement was lodged
Mailing Statement Number	System generated Mailing Statement Number
Progressive Mailing Statement Number	System generated Progressive Mailing Statement Number
Unique ID	Unique identification code for Mailing Statements supplied by the Mail Generator
Job Number	The Mail Generator's own job number
Job Name	The Mail Generator's own job name
Invoice Ref	The Mail Generator's own invoice reference
Originating Customer Name	The name of the Originating Customer, as entered by the Mail Generator
Account Number	The charge account number
Status	The current status of the Mailing Statement

To search for a statement

1. Click the **Search** tab.
2. Select one or more search criteria that will identify the statements you want to find.
For example, type the **Unique ID** for an order, or search for multiple statements by date range with the **From Date** and **To Date** fields. You can use more than one search criteria.
3. Click **Search**.
The statements that match your search criteria will be displayed.

6.3 View Mailing Statements

To view a statement, you must find the statement and then select the statement (or statements) you want to view from the search results page.

From the Search Results page, you can:

- In the **MS#** column, click the Mailing Statement you want to view
- Use the checkboxes on the left of the page to select one or more statements, and click **View MS**

From the View Mailing Statement page, you can then:

- Download and print statements
- Edit and cancel drafts
- Modify and cancel rejected statements
- View Pricing Statements
- View the audit trail

6.4 View a Progressive Mailing Statement

On your Home Page, the most recent Progressive Mailing Statements that are currently open are listed in the **Your Open Progressive Mailing Statements** section. To view a Progressive Mailing Statement, click the **View** button adjacent to the statement you want to view.

When you view a Progressive Mailing Statement, the information that is common to all statements in the progressive lodgement will be displayed at the top of the page. The statements that have been added to the progressive lodgement are listed in the **Mailing Statements** section. The list of statements includes the Mailing Statement No., the date the statement was lodged, and the status of each statement.

From the Progressive Mailing Statement page, you can:

- View details of each statement contained in the progressive lodgement
- Add new statements to the progressive lodgement
- Close the progressive lodgement
- Cancel the Progressive Mailing Statement

If the progressive statement you want to view is not listed, you can:

View the full list of open Progressive Mailing Statements

From your Home Page:

1. From the task menu, click **Progressive Statements**.
2. Click the **View** button adjacent to the statement you want to view.

Find all statements that belong to a progressive lodgement

From your Home Page:

1. Click the **Search** tab.
2. In the Progressive Mailing Statement Number field, type the Progressive Mailing Statement number.
3. Click **Search**.

The Mailing Statements that belong to the specified progressive lodgement will be displayed on the Search Results page. From here you can view one or more statements.

6.5 Downloading and printing



If the Mailing Statement has been previously printed, the **Printed** icon will appear in the first column on the Search Results page.

When you search for Mailing Statements, the statements that match your search criteria will be displayed on the **Search Results** page. Use the checkboxes on the left of the page to select the statements that you want to print or download.

To print the selected statements

1. Click **View MS**.
2. At the top-right corner of the page, click **printable**. The print-friendly version of the page will be displayed.
3. Click **Print**. The **Print** dialog will be displayed.
4. Select your printer and printing options, and click **Print**.

To download the selected statements

1. From the View Mailing Statement page, click **Download MS**.
2. Select either **XML** or **CSV** format for the downloaded file. The **File Download** dialog will be displayed. Click **Save**. The **Save As** dialog will be displayed.
3. Locate the folder where you want to save the file, and click **Save**.
4. The progress of the file download will be displayed. The time to download the file will depend on the size of the file and the speed of your modem.
5. When the download is complete, you can either:
 - Click **Open** to view the file.
 - Click **Open Folder** to display the files in the folder.
 - Click **Close**.
 - Close the **Download File** dialog.



You should always check the Status column before you view, download and print a statement

In particular, draft statements are subject to change, or may be cancelled without being submitted. Draft statements may be listed on the **Search Results** page unless you specifically exclude them from your search. To exclude draft statements from your search, from the **Search Details** page, in the **Status** section, clear the **Draft** checkbox.

6.5.1 XML and CSV formats

Downloadable versions of the Mailing Statement are available in both XML and CSV formats. The XML file conforms to the published XML schema for e-LMS Mailing Statements. You can view CSV files in a spreadsheet program, or import directly into a database.

6.6 View Mailing Statement audit trail

You can view a complete transactional history over the entire lifecycle of a Mailing Statement.

To view the audit trail of a statement, you must find the statement and then select the statement you want to view from the Search Results page.

To view the audit trail of a statement

1. From the Search Results page, in the **MS#** column, click the Mailing Statement you want to view. The Mailing Statement will be displayed.
2. From the View Mailing Statement page, click **View Audit Trail**.

To print the audit trail report

From the View Audit Trail page:

1. At the top-right corner of the page, click **printable**. The print-friendly version of the page will be displayed.
2. Click **Print**.
The **Print** dialog will be displayed.
3. Select your printer and printing options, and click **Print**.

Audit Trail Report

The following information will be displayed in the Audit Trail Report:



The Audit Trail Report is in date order.

Column	Description
Date	The date the task was performed. The time recorded is in the time zone of the Lodgement Point at which the MS is lodged
User ID	The Username login that performed the task
Status	The status after the task was performed
Detail	Details of the task performed including rejection reasons

7 About Pricing and Invoices



7.1 About pricing and invoices

The details you enter on the Mailing Statement are used to automatically price the order and generate the invoice. The pricing details for a Mailing Statement are contained in a Pricing Statement.

What do you want to know about?

How is the price determined?

7.2

Viewing Pricing Statements

7.4

Invoices

7.3

7.2 How is the price determined?

When a Mailing Statement is submitted, the details entered on the Mailing Statement, including the quantities of mail items, are sent to the Australia Post accounting system for pricing. This ensures that pricing of each statement is done with the latest information, and incorporates rates from any applicable contract you may have selected on the Mailing Statement.

A Pricing Statement is generated by the Australia Post accounting system and sent back to e-LMS, which can be viewed by the Originating Customer. Only the Originating Customer, who is being billed for the services, is permitted to view pricing.

Depending on product category you may be prompted to select **Full Rate** or **Contract Pricing** (refer to 5.2.2 step 2 on page 28).

7.3 Invoices

The details of the invoice are based on the Pricing Statement, which is auto-generated by the system and attached to the Mailing Statement. Once the Mailing Statement has been approved, the AustraliaPost accounting system will automatically create a billing entry in your account, which will appear on your next invoice statement.

7.3.1 Reconciling your account

You can reconcile your consolidated Tax Invoice against the individual Pricing Statements for each lodgement by referring to the following common fields/columns:

e-LMS Pricing Statement	Consolidated Tax Invoice
Mailing Statement No.	Refer to the Invoice Number column
Customer Account Number	Refer to Customer Account Number
Lodgement Point	Line items are sorted by Lodgement Point
Sales Order Number	Refer to the Transaction ID column
Invoice Reference Details	Refer to the Customer Reference column

If you have questions about your account

Contact your Australia Post account manager, who will investigate your query, and will be able to take any corrective action that may be required.

7.4 Viewing Pricing Statements



Only the Originating Customer, who is being billed for the services, is permitted to view pricing.

A Pricing Statement is attached to every Mailing Statement once it has passed the system checks. To view a Pricing Statement, you must find the statement and then select the statement (or statements) you want to view from the search results page.

From the Search Results page, you can:

- In the **MS#** column, click the Mailing Statement you want to view. The Mailing Statement will be displayed.
- Use the checkboxes on the left of the page to select one or more statements, and click **View MS** .



You can only view pricing on statements with the status of **Approved & Invoiced**.

From the View Mailing Statement page, you can then choose:

To view the Pricing Statement

You can only view pricing on statements that have been approved. Click **View Pricing Statement** .

To download the Pricing Statement

You can only view pricing on statements that have been approved.

1. Click **View Pricing Statement** .
2. Click **Download PS** .

For more information, refer to the Downloading and Printing section in online help.

To print the Pricing Statement

You can only view pricing on statements that have been approved.

1. Click **View Pricing Statement** .
2. Click **Print** .

For more information, refer to the Downloading and Printing section in online help.

Progressive lodgements

If the Mailing Statement is part of a progressive lodgement, you can also view, download and print the summary Pricing Statement. A summary Pricing Statement will be generated when each statement in the batch reaches the status of **Approved & Invoiced**. The summary Pricing Statement will contain the accumulated values of all items in the Mailing Statements contained in the progressive lodgement. A Pricing Statement is also generated for each Mailing Statement in the batch. The summary Pricing Statement will only be available if at least one statement contained in the lodgement has reached the status of **Approved & Invoiced**.

To view the summary progressive Pricing Statement

1. View any statement in the progressive lodgement that has the status of **Approved & Invoiced**.
2. Click the **View Progressive Pricing Statement** button.

8 Using Chargeback Functionality



8.1 Adding Chargeback Only Product

The creation of an Internal Chargeback Product is for Ext Generator Customers to create Chargeback Products for NON-e-LMS related products. These fields allow customers to create unique product codes.

Create code

Product Code

This is a unique code that the customer assigns to products.

Description

A brief description of the product that chargeback applies to.

Unit Cost

The unit price of each product shown above.

Comments

Additional information that may be required for creation of this product.

Save

Click [Save](#).

Create an Internal Chargeback Product

Bold fields (also marked with a *) are mandatory

Chargeback Product Details _____

Product Code	<input type="text"/>	*
Description	<input type="text"/>	
Unit Cost (0.00)	<input type="text"/>	*
Comments	<input type="text"/>	

[Save](#) [Cancel](#)

8.2 Maintain Chargeback Only Product

The maintenance of an Internal Chargeback Product is for Ext Generator Customers to maintain Chargeback Products for **NON-e-LMS** related products. These fields allow customers to maintain unique product codes.

Maintain Chargeback Product List					
Product Code	Description	Unit Cost	Created Date	Edit	Delete
SM2	Small envelope3	\$40.00	10/08/2010 14:25:06	Edit	Delete
BE1	Big envelope1	\$2.00	10/08/2010 14:25:06	Edit	Delete
PR&B	Pens: red & black	\$2.00	10/08/2010 14:25:06	Edit	Delete

Maintain chargeback code

Product Code

This is a unique code that the customer assigns to products.

Description

A brief description of the product that chargeback applies to.

Unit Cost

The unit price of each product shown above.

Comments

Additional information that may be required for creation of this product.

Product Code	<input type="text" value="graeme999"/>	*
Description	<input type="text" value="graeme test"/>	
Unit Cost (0.00)	<input type="text" value="0.22"/>	*
Comments	<input type="text"/>	
<input type="button" value="Save"/>		<input type="button" value="Cancel"/>

To edit Chargeback Product

1. Click on the button to change the product.
2. The above screen will display and you can then type over any fields as required.
3. Once Completed, Click the button.

To delete Chargeback Product

Click on the button to remove the product.

Chargeback Product Details					
Successfully deleted the Chargeback Product with code 'DPTTEST_PC_3'.					
Maintain Chargeback Product List					
Product Code	Description	Unit Cost	Created Date	Edit	Delete
graeme999	graeme test	\$0.22	03/08/2010 10:28:09	Edit	Delete
EP	Express Post 500gm satchel	\$8.40	05/08/2010 09:52:43	Edit	Delete
EP3kg	Express Post satchel 3kg	\$11.70	05/08/2010 09:53:31	Edit	Delete



Please note that if any codes have transactions associated with them less than 6 months old from time of creation, they cannot be deleted. The following message will display:

Chargeback Product Details



Errors were encountered. Please check the fields marked below and try again.

1. **The Product with code 'Express Post C5' has one or more associated items, and so cannot be deleted.**

1. **The Product with code 'Express Post C5' has one or more associated items, and so cannot be deleted.**

Maintain Chargeback Product List

Product Code	Description	Unit Cost	Created Date		
Express Post C5	Single	\$4.00	30/09/2010 22:35:16	Edit	Delete

8.3 Add Chargeback Cost Centre

The creation of an Internal Chargeback Cost Centre is for Ext Generator Customers to create Chargeback Cost Centres for **e-LMS** and **NON-e-LMS** related products. These fields allow customers to create unique Cost Centres.

Create code

Cost Code

This is a unique code that the customer creates to assign to account codes.

Account Code

This is a list of account numbers (own accounts) that you wish to apply the Cost Centres to. You may apply to one account number or all account numbers.

Comments

Additional information that may be required for creation of this product.

Unit Cost

The unit price of each product shown above.

Save

Click **Save**.

Create a Chargeback Cost Centre

Bold fields (also marked with a *****) are mandatory

Chargeback Cost Centre Details

Code

Account Code

Location

Description

Comments

Save

Cancel

8.4 Maintain Chargeback Cost Centre

The maintenance of an Internal Chargeback Cost Centre is for Ext Generator Customers to maintain Chargeback Cost Centres for e-LMS and NON-e-LMS related products. These fields allow customers to edit or delete Cost Centres.

Chargeback Cost Centres

Cost Code

This is a unique code that the customer creates to assign to account codes.

Account Code

This is a list of account numbers (own accounts) that you wish to apply the Cost Centres to. You may apply to one account number or all account numbers.

Description

A brief description of the Cost Code that it applies to.

Location

A brief description of the location of the Cost Code that it applies to (not mandatory).

Date Created

Show date of when the Cost Centre Code was originally created. Chargeback Cost Centres can be edited and

deleted.

Chargeback Cost Centres

Your Chargeback Cost Centres

Cost Centre Code	Account Code	Description	Location	Date Created	Edit	Delete
0000000021/6-3093	1674	Marketing		19/08/2010	Edit	Delete
0000000021/6-3094	1674	Graphics		04/08/2010	Edit	Delete

To edit a Cost Centre

Click the **Edit** button on the row you wish to change.

To delete a Cost Centre

Click the **Delete** button on the row you wish to remove.



Please note that if any codes have transactions associated with them less than 6 months old from time of creation, they cannot be deleted. The following message will display:

Chargeback Cost Centres

1. "The Cost Centre with code '0000000021/6-3093' has one or more items, and so cannot be deleted.

Your Chargeback Cost Centres						
Cost Centre Code	Account Code	Description	Location	Date Created	Edit	Delete
0000000021/6-3093	1674	Marketing		19/08/2010	Edit	Delete
0000000021/6-3094	1674	Graphics		04/08/2010	Edit	Delete

8.5 Add Chargeback Only Item

The adding Chargeback Only Item is for Ext Generator Customers to allocate **NON e-LMS** related products to your Internal Cost Centre Codes.

Add Chargeback Only Item

Product Code

Click on the drop down to select product code from the list.

Account Code

Click on the drop down to select an Account Code (note: amount allocated in this area does not affect your Australia Post Account).

Cost Centre

Click on the drop down to select a Cost Centre Code where the product needs to be charged to.

Unit Cost (0.00)

This unit cost is linked to the selected Product Code and will automatically display.

Quantity

Enter the quantity of the product required to be charged.

Comments

Additional information that may be required for creation of this item.

Save



Click  .

Create a Chargeback Item

Bold fields (also marked with a *) are mandatory

Chargeback Item Details

Product	<input type="text" value="Please select a product..."/>	*
Account Code	<input type="text" value="Please select an account code..."/>	*
Cost Centre	<input type="text" value="Please select a cost centre..."/>	*
Unit Cost (0.00)	<input type="text"/>	*
Quantity	<input type="text"/>	*
Comments	<input type="text"/>	

8.6 Maintain Chargeback Only Item

The adding Chargeback Only Item is for Ext Generator Customers to allocate **NON e-LMS** related products to your Internal Cost Centre Codes.

Add Chargeback Only Item

Product Code

Click on the drop down to select **Product Code** from the list.

Account Code

Click on the drop down to select an Account Code (note: amount allocated in this area does not affect your Australia Post Account).

Cost Centre

Click on the drop down to select a Cost Centre code where the product needs to be charged to.

Unit Cost (0.00)

This unit cost is linked to the selected product code and will automatically display.

Quantity

Enter the quantity of the product required to be charged.

Comments

Additional information that may be required for creation of this item.

Save:

Click **Save**.

Chargeback Cost Centres can be edited and deleted.

To edit a Cost Centre

Click the **Edit** button on the row you wish to change.

To delete a Cost Centre

Click the **Delete** button on the row you wish to remove.



Please note that if any codes have transactions associated with them less than 6 months old from time of creation, they cannot be deleted. The following message will display:

Chargeback Cost Centres

1. "The Cost Centre with code '000000021/6-3093' has one or more items, and so cannot be deleted.

Your Chargeback Cost Centres

Cost Centre Code	Account Code	Description	Location	Date Created		
000000021/6-3093	1674	Marketing		19/08/2010	Edit	Delete
000000021/6-3094	1674	Graphics		04/08/2010	Edit	Delete

9 Reporting



9.1 Reports

You can select from the following standard reports:

Lodgements Report

9.2

View list of users

9.4

Reconciliation Report

9.3

Chargeback Items Report

9.5

9.2 Lodgements Report



You must login as Administrator to view this report.

The Lodgements Report gives summary information on your lodgements. The scope of the report can be restricted by date range, by lodgement point and by other report filters. For example, you can report on all lodgements made during the month of June.

Creating a report is a multi-step task. In this first step, you will define the filters that control the contents of the report and how you want the report outputted. If you choose to display the report, once you have verified that the report contains the information you want, you can then print or download the report.

Two download formats are available

- CSV format files can be viewed and reformatted in a spreadsheet program, or imported directly into a database.
- HTML is a widely used document format which can be viewed and edited in most word-processing programs.



When appropriate, you should always use filters to restrict the size of your report; the e-LMS database is nationwide and contains a large volume of information. Unfiltered reports will take longer to generate, are slower to download, and are more difficult to manage and format in spreadsheets.

To create and view a report



Reports displayed on the screen are limited to a maximum of 10,000 Mailing Statements.

1. From the navigation menu, click **Reports**. The Reports page will be displayed.
2. From the task menu, click **Customer Lodgements**. The Lodgement Report page will be displayed.
3. Use the fields displayed in the **Filter Details** section to filter and sort your report.
4. Click **Create Report**. Summary details of lodgements that match your filter settings will be displayed.

To return to the Lodgement Report page and change your filter settings, click

Back to Search.

To return to the Reports page and select a different report, click

Back to Reports.

To download a report in CSV or HTML format



Reports displayed on the screen are limited to a maximum of 10,000 Mailing Statements.

1. Select to create Report for CSV or HTML download or alternatively create and view the report on-screen (see previous page) if the report is for less than 10,000 Mailing Statements.
2. Click the **Save Results to CSV** or **Save Results to HTML** button.
The **File Download** dialog will be displayed.
3. Click **Save**.
The **Save As** dialog will be displayed.
4. Locate the folder where you want to save the file, and click **Save**.

The progress of the file download will be displayed. The time to download the file will depend on the size of the file and the speed of your modem.

When the download is complete, you can either:

- Click **Open** to view the file,
- Click **Open Folder** to display the files in the folder, or
- Click **Close**.

9.3 Reconciliation Report



You must login as Administrator to view this report.

The Reconciliation Report gives details of the items lodged on your accounts. The scope of the report can be restricted by date range, by account number and by other report filters. For example, you can report on all lodgements made since the start of the month, on a particular account number.

Creating a report is a multi-step task. In this first step, you will define the filters that control the contents of the report and how you want the report outputted. If you choose to display the report, once you have verified that the report contains the information you want, you can then print or download the report.

Two download formats are available

- CSV format files can be viewed and reformatted in a spreadsheet program, or import directly into a database.
- HTML is a widely used document format which can be viewed and edited in most word-processing programs.



When appropriate, you should always use filters to restrict the size of your report; the e-LMS database is nationwide and contains a large volume of information. Unfiltered reports will take longer to generate, are slower to download, and are more difficult to manage and format in spreadsheets.

To create and view a report



Reports displayed on the screen are limited to a maximum of 10,000 records.

1. From the navigation menu, click **Reports**.
The Reports page will be displayed.
2. From the task menu, click **Reconciliation**.
The Reconciliation Report page will be displayed.
3. Use the fields displayed in the **Filter Details** section to filter and sort your report.
4. Click **Create Report**.
Summary details of reconciliations that match your filter settings will be displayed.

To return to the Reconciliations Report page and change your filter settings, click **Back to Search**.

To return to the Reports page and select a different report, click **Back to Reports**.

To download a report in CSV or HTML format



Reports are limited to a maximum of 10,000 records.

1. Select to create Report for CSV or HTML download or alternatively create and view thereport on-screen (see above) if the report is for less than 10,000 records.
2. Click the **Save Results to CSV** or **Save Results to HTML** button.
The **File Download** dialog will be displayed.
3. Click **Save**.
The **Save As** dialog will be displayed.
4. Locate the folder where you want to save the file, and click **Save**.
The progress of the file download will be displayed. The time to download the file will depend on the size of the file and the speed of your modem.

When the download is complete, you can either:

- Click **Open** to view the file,
- Click **Open Folder** to display the files in the folder, or
- Click **Close**.

9.4 View list of users



You must login as Administrator to view this report.

You can view a list of users in your account, filtered and sorted on selected database field names. You can then either print the report directly from e-LMS, or download the report in CSV or HTML format.

Two download formats are available

- CSV format files can be viewed and reformatted in a spreadsheet program, or import directly into a database.
- HTML is a widely used document format which can be viewed and edited in most word-processing programs.

To view and print a list of users

1. From the navigation menu, click **Reports**.
The Reports page will be displayed.
2. From the task menu, click **User**.
The List of Users page will be displayed.
3. Use the fields displayed in the **Filter Details** section to filter and sort your report.
4. Click **Create Report**.
Summary details of users that match your filter settings will be displayed.
5. To print the list, at the top-right corner of the page, click **printable**. The print-friendly version of the page will be displayed.
6. Click **Print**.
The **Print** dialog will be displayed.
7. Select your printer and printing options, and click **Print**.

To return to the List of Users page and change your filter settings, click

Back to Search

To return to the Reports page and select a different report, click

Back to Reports

To download a list of users

1. From the navigation menu, click **Reports**.
The Reports page will be displayed.
2. From the task menu, click **External Users**.
The List of External Users page will be displayed.
3. Use the fields displayed in the **Filter Details** section to filter and sort your report.
4. Click **Create Report**.
Summary details of users that match your filter settings will be displayed.
5. Click the **Save Results to CSV** or **Save Results to HTML** button.
The **File Download** dialog will be displayed.
6. Click **Save**.
The **Save As** dialog will be displayed.
7. Locate the folder where you want to save the file, and click **Save**.
The progress of the file download will be displayed. The time to download the file will depend on the size of the file and the speed of your modem.

When the download is complete, you can either:

- Click **Open** to view the file,
- Click **Open Folder** to display the files in the folder, or
- Click **Close**.

9.5 Chargeback Items Report



You must login as Administrator to view this report.

The Chargeback Items Report gives summary information on your Chargeback. The scope of the report can be restricted by Cost Centre Code, MS Line Item Product, Chargeback Only Product, Account Number and Date Range. For example, you can report on all Cost Centre Codes made during the month of June.

Creating a report is a multi-step task. In this first step, you will define the filters that control the contents of the report and how you want the report outputted. If you choose to display the report, once you have verified that the report contains the information you want, you can then print or download the report.

Two download formats are available

- CSV format files can be viewed and reformatted in a spreadsheet program, or import directly into a database.
- HTML is a widely used document format which can be viewed and edited in most word-processing programs.



When appropriate, you should always use filters to restrict the size of your report; the e-LMS database is nationwide and contains a large volume of information. Unfiltered reports will take longer to generate, are slower to download, and are more difficult to manage and format in spreadsheets.

To create and view a report



Reports displayed on the screen are limited to a maximum of 10,000 records.

1. From the navigation menu, click **Reports**. The Reports page will be displayed.
2. From the task menu, click **Chargeback Items**. The Chargeback Item Report page will be displayed.
3. Use the fields displayed in the **Filter Details** to filter and sort your report.
4. Click **Create Report**. Summary details of Chargeback Items that match your filter settings will be displayed.

To return to the Chargeback Item Report page and change your filter settings, click **Back to Search**.

To return to the Reports page and select a different report, click **Back to Reports**.

To download a report in CSV or HTML format



Reports displayed on the screen are limited to a maximum of 10,000 records.

1. Select to create Report for CSV or HTML download or alternatively create and view the report on-screen (see above) if the report is for less than 10,000 records.
2. Click the **Save Results to CSV** or **Save Results to HTML** button. The **File Download** dialog will be displayed.
3. Click **Save**. The **Save As** dialog will be displayed.
4. Locate the folder where you want to save the file, and click **Save**.

The progress of the file download will be displayed. The time to download the file will depend on the size of the file and the speed of your modem.

When the download is complete, you can either:

- Click **Open** to view the file,
- Click **Open Folder** to display the files in the folder, or
- Click **Close**.

10 Frequently asked questions



Question	Answer	Relevant to
Who do I call when I need help?	Contact Australia Post e-LMS Support on 1800 028 361 .	All customers
Can a customer create user accounts and reset passwords?	Yes. In fact your in-house e-LMS Administrator is the only user that is authorised to add and maintain users and reset a user's password.	All customers
When adding a customer charge account, why does the number stay in the Pending Accounts?	If the account number has not been previously recorded in e-LMS, the system performs an overnight update of the database. You should add your customer account numbers at least one day before you want to create statements that use that account.	Administrators
When logging in, the system will not accept my password.	<p>To type in a valid password, follow this checklist</p> <ol style="list-style-type: none"> 1. Passwords are case sensitive, and can be a mix of upper and lower case, numeric and special characters. Ensure you are entering the password correctly. 2. Passwords cannot be less than 8 or more than 32 characters long. 3. When you change your password, you cannot re-use an old password. 	All users

Question	Answer	Relevant to
<p>When working in e-LMS, some of the list boxes and text fields either do not display at all, or do not behave properly.</p>	<p>Unsupported versions of Windows or IE can affect the functions of the e-LMS system.</p> <p>The minimum system configurations are:</p> <p>Operating system Microsoft Windows 7 or later.</p> <p>Internet browser Microsoft Internet Explorer 5.5 (SP1) or later, or Mozilla Firefox 1.5 or later.</p>	<p>All users</p>
<p>How do I add customers to the list of Originating Customers displayed when I create a new Mailing Statement?</p>	<p>Ask your e-LMS Administrator to add the customer name using the Customer Names function.</p>	<p>Mail Generators</p>
<p>What do I do when a statement has the status of System Checks Failed?</p>	<p>Contact the Australia Post Business Centre where you lodged the mail.</p>	<p>Mail Generators</p>
<p>Can I print or download more than one statement at the same time?</p>	<p>Yes, you can print and download multiple statements. When you search for Mailing Statements, the statements that match your search criteria will be displayed on the Search Results page. Use the checkboxes on the left of the page to select the statements that you want to print or download.</p> <p>To print the selected statements:</p> <ol style="list-style-type: none"> 1. Click View MS. 2. Click printable (top right of the page). 3. From the Print dialog, select your printer and other print options, then click Print. <p>To download the selected statements:</p> <ol style="list-style-type: none"> 1. Click Download MS. 2. Select CSV or HTML format. 3. From the Download File dialog, click Save. 4. From the Save As dialog, navigate to the folder where the file will be saved, and click Save. 5. Close the Download File dialog. 	<p>All users</p>

11 e-LMS contacts



For assistance with using e-LMS

Please contact Australia Post e-LMS Support on **1800 028 361** or auspost.com.au/lodgement-techsupport



For assistance with your account

Please contact your Australia Post Account Manager or Credit Officer.



For information about joining the Bulk Mail Partner Program

Please visit: auspost.com.au/BMP
or contact your Australia Post Account Manager or call **13 13 18**.



Useful links

auspost.com.au auspost.com.au/ELMS

