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This job aid only applies to the management of Origin Entry appointments

Managing Origin Entry Appointments Job Aid

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1. Appointment Management Capabilities for Origin Entry JIT One-Time Appointments

Users may manage existing Origin Entry JIT One-Time appointments through the JIT One-Time Appointment management module of the FAST Origin Entry application.

Once the user searches for a JIT One-Time appointment (by Appointment ID, Scheduler ID, Origin Entry Facility, or Customer Registration ID) the Existing JIT One-Time Appointment Summary section will display on the *Search Existing JIT One-Time Appointment Information* page. The Appointment ID will be hyperlinked and upon clicking the hyperlink, the user will be directed to the *JIT One-Time Appointment Information* page where the user can:

- Edit appointment logistics information
- Edit appointment level information
- Edit content information
- Add additional content
- Cancel a content
- Close an appointment
- Cancel an appointment

2. How do I Manage JIT One-Time Appointments?

Managing existing JIT One-Time Appointments:
A JIT One-Time Appointment can be managed via the Manage Existing JIT One-Time Appointments module. The following steps demonstrate the appointment management process for a JIT One-Time appointment that is searched for by Appointment ID.

1. From the FAST Landing page, select the **Origin Entry** link on the left toolbar.
2. From the FAST Origin Entry Landing page, select the *JIT One-Time Appointment* **Go** button.
3. From the *Just In Time (JIT) One-Time Appointment* landing page, select the Manage Existing JIT One-Time Appointment **Go** button.
4. *Search Existing JIT One-Time Appointment Information* page is displayed.
5. Select the Appointment ID search option from the **Search By** drop-down menu
6. Click the **Submit** button to display the Appointment ID field.
7. Enter a valid Appointment ID in the Appointment ID field.
8. Click the **Search** button to refresh the page and display the associated Appointment ID in the summary table.
9. Click the hyperlink associated to the Appointment ID.
10. *JIT One-Time Appointment Information* page is displayed.

An image of the *Search Existing JIT One-Time Appointment Information* page is displayed on the following page.

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Search Existing JIT One-Time Appointment Information

Choose Search Criteria
Please select the search method and enter the required appointment information. Then click Search to locate the appointment. (* Required Fields)

* Search By: Origin Entry Facility   Submit >

State: NY   View Cities >   NASS Code: Search >
City: NEW YORK   Search >
* Origin Entry Facility: 100 - NEW YORK

* Customer Registration ID: BILL03192010 - 10000962

* Select Date Range: 08/03/2010 To: 08/03/2010

* Mail Class:
☑ All
☐ First-Class
☐ Standard
☐ Package Services
☐ Periodicals

< Cancel   Search >

Existing JIT One-Time Appointment Summary

Below is the summary of your existing one-time appointments. Please click an appointment ID link to access the content information you would like to view/edit.
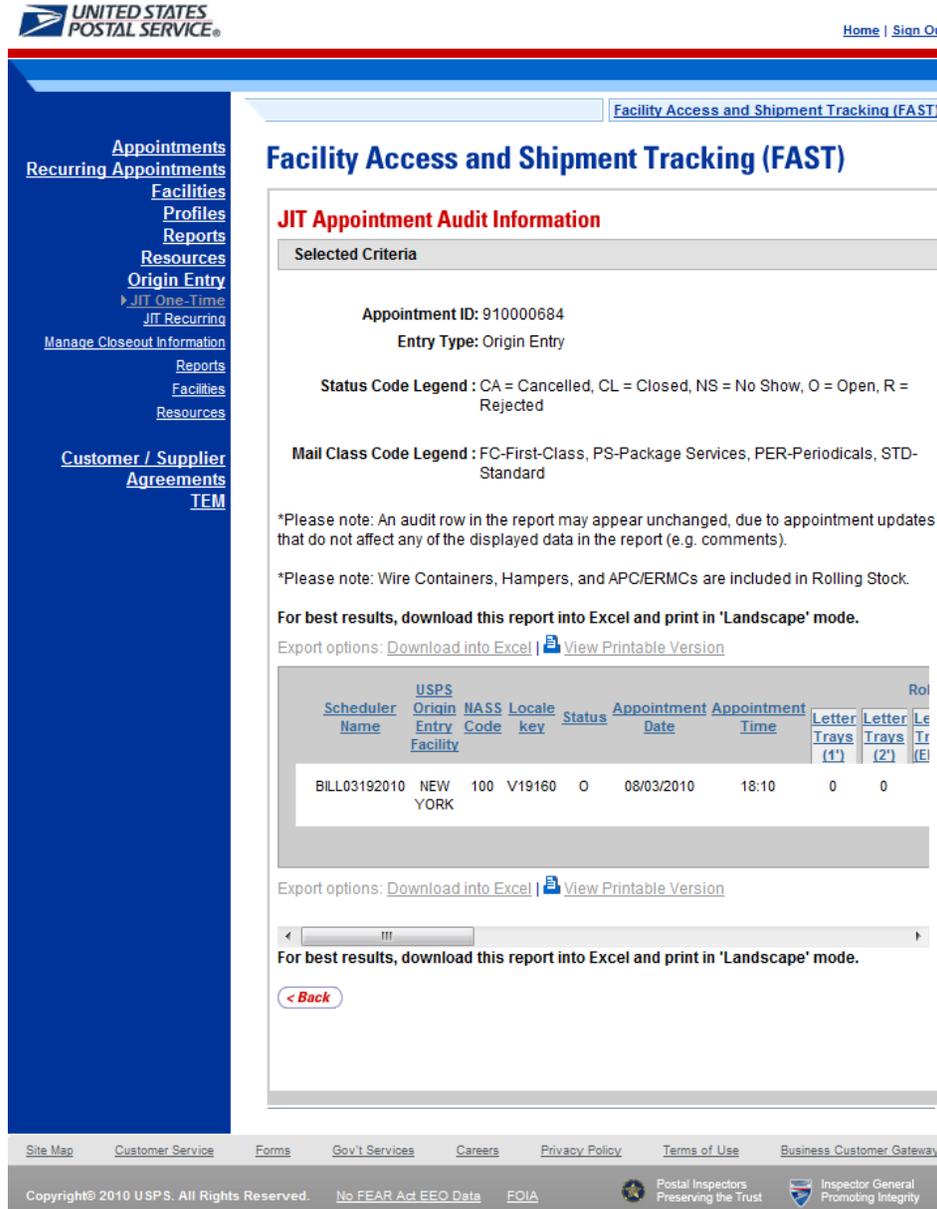
4 results

Appt ID	Status	USPS Origin Entry Facility	Locale Key	Date	Time	Mail Class
910000684	Open	100 - NEW YORK	V19160	08/03/2010	18:10	
910000685	Open	100 - NEW YORK	V19160	08/03/2010	15:30	
910000686	Open	100 - NEW YORK	V19160	08/03/2010	15:10	
910000687	Open	100 - NEW YORK	V19160	08/03/2010	15:30	Standard

4 results

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Viewing the JIT One-Time Appointment Audit Information:
A user may view the audit information for an appointment by clicking the **View Audit Information** button on the *JIT One-Time Appointment Information* page.

An image of the *JIT Appointment Audit Information* page is displayed below.

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Editing Appointment Logistics Information

The following steps demonstrate how the user may edit the logistics information of a JIT One-Time appointment. Please note that the user may only edit the logistics information for an appointment if the scheduled date/time is in the future.

1. Click the **Manage Logistics** button on the *JIT One-Time Appointment Information* page.
2. *Manage JIT One-Time Appointment* page is displayed, populating the following fields with the existing appointment information:

   - Origin Entry Facility
   - NASS Code
   - Mail Class(es)
   - Customer Registration ID
   - Date Range

3. After editing any of the above information, click the **Search** button.
4. *JIT One-Time Appointment Time Selection* page is displayed.
5. Click on an available hour to select the time.
6. *JIT One-Time Appointment Information* page is displayed with the updated appointment logistics information.

An image of the *Manage JIT One-Time Appointment* page is displayed on the following page.
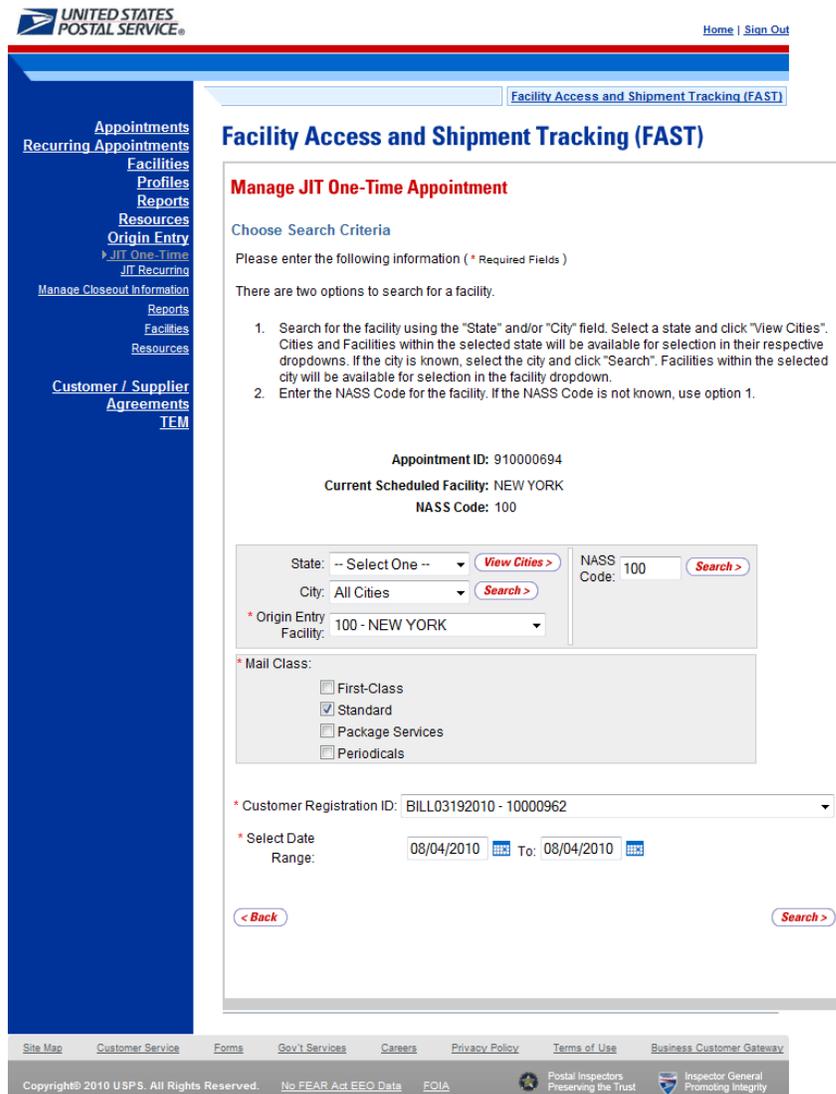
Editing Content Level Information
The following steps demonstrate how the user may edit the content level information of a JIT One-Time appointment. This functionality allows the user to add or remove contents from the selected JIT One-Time appointment.

1. Click the **Manage Content** button on the *JIT One-Time Appointment Information* page.
2. *Add/Edit Content Information* page is displayed.
3. After editing the content information, click the **Submit** button.
4. *JIT One-Time Appointment Confirmation* page is displayed.
5. User may click the **Appointment ID** hyperlink to display the *JIT One-Time Appointment Information* page.

An image of the *Add/Edit Content Information* page is displayed on the following page.

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Add/Edit Content Information

Please Note: A content describes the mail associated to a mailing or segment of a mailing to be presented to the postal service at one specific time.

A mailing is a group of pieces within the same class of mail and the same processing category that may be sorted together and/or presented under a single minimum volume mailing required under the applicable standards.

Selected Criteria

Scheduler ID: 200240000010
Scheduler Name: BILL03192010
Customer Registration ID: 10000962
USPS Origin Entry Facility: NEW YORK
NASS Code: 100
Appointment Date: 08/04/2010
Appointment Time: 15:null
Mail Class(es): Standard

To add content information, input the number of contents to add and click "Manage Content".
Click the "Submit" button with only empty contents to bypass content creation and manage the appointment shell.

Update Number of Contents:

First-Class	Standard	Package Services	Periodicals
0	1	0	0

Manage Content

Content #110000351   ☐ Clear Content

Mail Class: Standard

Mail Preparer ID: [▼]   **View All**

Mail Owner ID: [▼]   **Add >**

View All   Associated Mail Owners: [   ]   **Remove >**

Content Name: [   ]

* Mail Shape: [Letter ▼]

Note: NFM < 6oz should be scheduled as Irregular Parcels and NFM >= 6oz should be scheduled as Machinable Parcels.

Count of Pallets

| 1' Letter Trays: | 0 | 2' Letter Trays: | 1 | EMM Letter Trays: | 0 |
| Flat Trays: | 0 | Parcels: | 0 | Sacks: | 0 | Bundles: | 0 |

Bedloaded

| 1' Letter Trays: | 0 | 2' Letter Trays: | 0 | EMM Letter Trays: | 0 |
| Flat Trays: | 0 | Parcels: | 0 | Sacks: | 0 | Bundles: | 0 |

eVS Content: ☐   eFile Number: [   ]

Cancel   **Clear Contents**

Canceling a JIT One-Time Appointment
The following steps demonstrate how the user may cancel a JIT One-Time appointment. Canceling an appointment cancels all contents that are associated to the appointment. In order to cancel a JIT One-Time appointment the user will need to provide a cancellation reason.

1. Click the **Cancel Appointment** button on the *JIT One-Time Appointment Information*.
2. *Confirm Cancel JIT One-Time Appointment* page is displayed.
3. Select a **Cancellation Reason** from the drop-down menu.
4. Click the **Yes** button to confirm the appointment cancellation.
5. *JIT One-Time Appointment Cancellation Confirmation* page is displayed.

An image of the *Confirm Cancel JIT One-Time Appointment* page is displayed below.
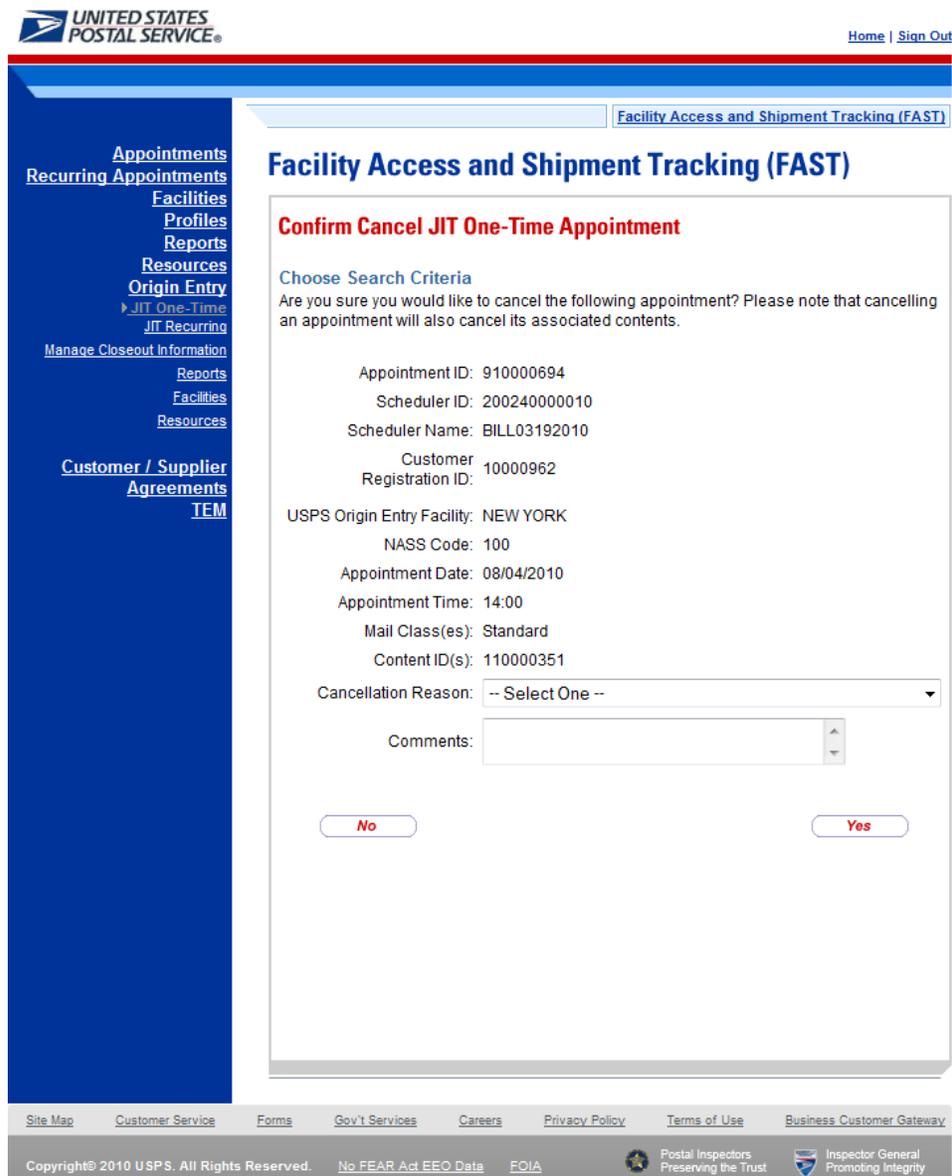
3. Appointment Management Capabilities for Origin Entry JIT Recurring Appointments

Users may manage existing Origin Entry JIT Recurring appointments through the JIT Recurring Appointment management module of the FAST Origin Entry application.

Once the user searches for a JIT Recurring appointment (by Scheduler ID, Origin Entry Facility, Sequence Number, or Customer Registration ID) the Existing JIT One-Time Appointment Summary section will display on the *Search Existing JIT Recurring Appointment Information* page. The Appointment ID will be hyperlinked and upon clicking the hyperlink, the user will be directed to the *Manage Existing JIT Recurring Appointment* page where the user can:

- Edit appointment level information
- Access the *Add/Edit Content Information* page
- Cancel the JIT Recurring appointment
- View/access instances of the JIT Recurring appointment
- View summary contents

4. How do I manage JIT Recurring Appointments?

Through the *Manage Existing JIT Recurring Appointment* page, users are able to search for existing JIT recurring appointments by scheduler ID, origin entry facility, sequence number, or customer registration ID. The following job aid shows how to search using a customer registration ID.

Managing a JIT Recurring Appointment:

1. From the FAST Landing page, select the **Origin Entry** link on the left toolbar.
2. From the FAST Origin Entry Landing page, select the *JIT Recurring Appointment* **Go** button.
3. From the *Just In Time (JIT) Recurring Appointment* landing page, select the *Manage Existing JIT Recurring Appointment* **Go** button.
4. *Search Existing JIT Recurring Appointment Information* page is displayed.
5. Select the Customer Registration ID from the **Search By** drop-down menu.
6. Select a Mailer from the Customer Registration drop-down box.
7. Select at least one Mail Class from the Mail Class checkboxes.
8. Click the **Search** button to refresh the page and display the associated Appointment ID in the summary table.

An image of the *Search Existing JIT Recurring Appointment Information* page is displayed on the following page.

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Search Existing JIT Recurring Appointment Information

Choose Search Criteria
Please select the search method and enter the required appointment information.
Then click Search to locate the appointment.(* Required Fields)

* Search By: [Customer Registration ID ▼]   Submit >

* Customer
Registration ID: [NEW MAILER 222 - 10001173 ▼]

* Mail Class:

☑ All
☐ First-Class
☐ Standard
☐ Package Services
☐ Periodicals

< Cancel   Search >

Existing JIT Recurring Appointment Summary

Below is a summary of your existing recurring appointments. Please select an
appointment to access the content information you would like to view/edit.

2 results

Sequence Number	Scheduler Name	USPS Origin Entry Facility	Time	Locale Key	Scheduling Frequency	Effective Start Date	Effective End Date	Mail Class	Sta
99363	NEW MAILER 222	NEW YORK	12:00	V19160	Every TUESDAY, MONDAY, WEDNESDAY	08/07/2010	08/07/2999	Standard	Ope
99356	NEW MAILER 222	NEW YORK	12:00	V19160	Every TUESDAY, THURSDAY, MONDAY, WEDNESDAY, FRIDAY	08/05/2010	08/04/2999	Standard	Ope

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Viewing the JIT Recurring Appointment Audit Information
A user may view the audit information for an appointment by clicking the **View Audit Information** button on the *Manage Existing JIT Recurring Appointment* page.

An image of the *JIT Recurring Appointment Audit Information* page is displayed below:

Editing JIT Recurring Appointment Logistics Information

The following steps demonstrate how the user may edit the logistics information of a JIT Recurring appointment. The user may edit the logistics information of a JIT Recurring Appointment directly on the *Manage Existing JIT Recurring Appointment* page.

1. Click the desired field or drop-down menu and update the entry with the new information
   - Facility
   - Mail Class
   - Date Range
   - Appointment Time
   - Scheduling Frequency
   - Comments regarding the appointment

2. Click the **Submit** button on the *Manage Existing JIT Recurring Appointment* page.
3. *JIT Recurring Appointment Confirmation* page is displayed.

An image of the *Manage Existing JIT Recurring Appointment* page is displayed on the following page:

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Manage Existing JIT Recurring Appointment

Below is the recurring appointment information you requested. Edit the information as needed and click submit to save. To access mailing information, click the Manage Content button.

Sequence Number: 99356
Status: Open
Customer Registration ID: 10001173
Scheduler ID: 201660000000
Scheduler Name: NEW MAILER 222
USPS Origin Entry Facility: NEW YORK
NASS Code: 100
Locale Key: V19160

(View Audit Information >)

State: -- Select One --   (View Cities >)   NASS Code: [   ] (Search >)
City: All Cities   (Search >)
* Origin Entry Facility: 100 - NEW YORK

* Mail Class:
☐ First-Class
☑ Standard
☐ Package Services
☐ Periodicals

* Select Date Range: 08/05/2010 📅 To: 08/04/2999 📅

* Appointment Time:
Hour: 12:   Minute: 00

* Scheduling Frequency:
Note: Scheduling frequencies occur on a weekly basis.

☐ Saturday
☐ Sunday
☑ Monday
☑ Tuesday
☑ Wednesday
☑ Thursday
☑ Friday

Comments: [   ]

(< Cancel)   (Cancel Recurring Appointment >) (Submit >)

Recurring Appointment Contents

Content ID	Mail Preparer	Mail Class	Mail Shape	Rolling Stock Count	Pallet Count	Bedloaded Unit Count
100018525	N/A	Standard	Letter	0	1	0
100018524	N/A	Standard	Letter	0	1	0

(Manage Content)

Recurring Appointment Instances

Appointment ID	Appointment Date/Time	Mail Class	Total Rolling Stock Count	Total Pallet Count	Total Bedloaded Count
99356R0805	08/05/2010 12:00	Standard	0	2	0
99356R0806	08/06/2010 12:00	Standard	0	2	0

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Editing Content Level Information

The following steps demonstrate how the user may manage the content level information of a JIT Recurring appointment. This functionality allows the user to add or remove contents from the selected JIT Recurring appointment.

1. Click the **Manage Content** button on the *Manage Existing JIT Recurring Appointment* page.
2. *Add/Edit Content Information* page is displayed.
3. After editing the content information, click the **Submit** button.
4. *Confirm JIT Recurring Appointment Information* is displayed.
5. Click **Yes** on *Confirm JIT Recurring Appointment Information* page to confirm changes.
6. *JIT Recurring Appointment Confirmation* page is displayed.
7. User may click the **Sequence Number** hyperlink to display the *Manage Existing JIT Recurring Appointment* page.

An image of the *Add/Edit Content Information* page is displayed on the following page.

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Facility Access and Shipment Tracking (FAST)

Add/Edit Content Information

Please Note: A content describes the mail associated to a mailing or segment of a mailing to be presented to the postal service at one specific time.

A mailing is a group of pieces within the same class of mail and the same processing category that may be sorted together and/or presented under a single minimum volume mailing required under the applicable standards.

Customer Registration ID: 10001173
Scheduler ID: 201660000000
Scheduler Name: NEW MAILER 222
USPS Origin Entry Facility: NEW YORK
NASS Code: 100
Appointment Date Range: 08/05/2010 to 08/04/2999
Appointment Time: 12:00
Mail Class(es): Standard

To add content information, input the number of contents to add and click "Manage Content".
Click the 'Submit' button with only empty content to bypass content creation and create an appointment shell.

Update Number of Contents:

First-Class	Standard	Package Services	Periodicals
0	2	0	0

Manage Content

Content #100018525   ☐ Cancel Content

Mail Class: Standard

Mail Preparer ID: [▼]   **View All**

Mail Owner ID: [▼]   **Add >**

View All   Associated Mail Owners: [   ]   **Remove >**

Content Name: [   ]

* Mail Shape: [Letter   ▼]

Note: NFM < 6oz should be scheduled as Irregular Parcels and NFM >= 6oz should be scheduled as Machinable Parcels.

Count of Pallets

1' Letter Trays:	1	2' Letter Trays:	0	EMM Letter Trays:	0		
Flat Trays:	0	Parcels:	0	Sacks:	0	Bundles:	0

Bedloaded

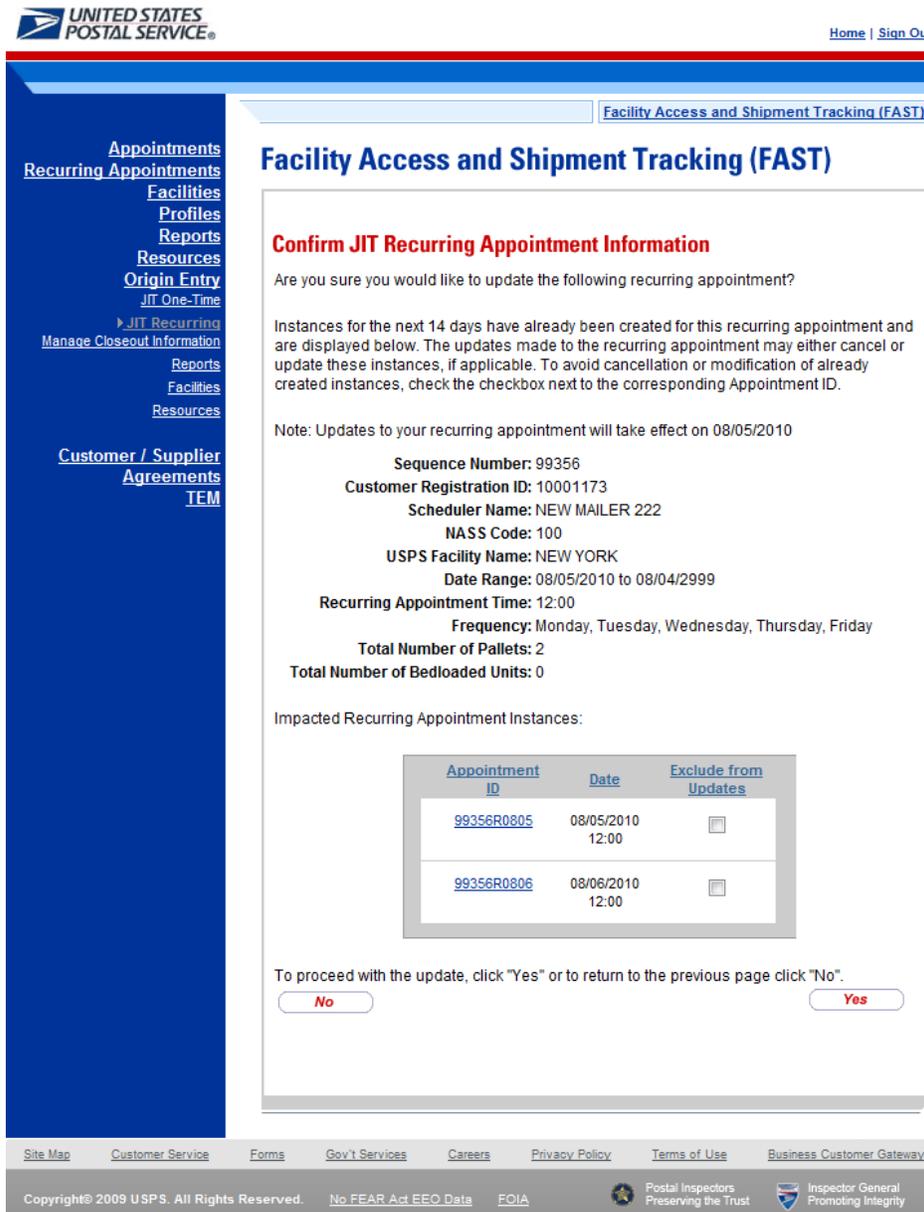| 1' Letter Trays:	0	2' Letter Trays:	0	EMM Letter Trays:	0		
Flat Trays:	0	Parcels:	0	Sacks:	0	Bundles:	0

eVS Content: ☐

Canceling a Content from a JIT Recurring Appointment
The following steps demonstrate how the user may cancel contents from an existing JIT Recurring Appointment. Please note that a JIT Recurring appointment must have at least one content to remain a valid appointment.

1. Click the **Cancel Content** checkbox for the appropriate content on the *Add/Edit Content Information* page.
2. Click the **Cancel Content** button.
3. *Confirm JIT Recurring Appointment Information* page is displayed.
4. Click the **Yes** button to confirm the content cancellation.
5. *JIT Recurring Appointment Confirmation* page is displayed.
   Click the **Yes** button to confirm the content cancellation.

An image of the *Confirm JIT Recurring Appointment Information* page is displayed below.

Canceling a JIT Recurring Appointment

The following steps demonstrate how the user may cancel a JIT recurring appointment. Canceling an appointment also cancels all contents that are associated to the appointment. Please note that canceling a recurring appointment does not cancel any appointment instances that have been created within the next 14 days. Recurring Appointment instances will need to be cancelled individually.

In order to cancel a JIT recurring appointment or appointment instances the user will need to provide a cancellation reason.

1. Click the **Cancel Recurring Appointment** button on the *Manage Existing JIT Recurring Appointment* page.
2. *Confirm Cancel JIT Recurring Appointment* page is displayed.
6. Select a **Cancellation Reason** from the drop-down menu.

3. Click the **Yes** button to confirm the appointment cancellation
4. *Cancel JIT Recurring Appointment Confirmation* page is displayed.

An image of the *Confirm Cancel JIT Recurring Appointment* page is displayed below.