

Royal Mail

User Guide for Documentation

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This a legally binding document forming part of the Agreement between you and Royal Mail



Contents

Introduction	3
Documentation requirements	4
Computer planning report.....	6
eManifest	8
Manual sort reports.....	10
Line listings.....	11
Changes to your line listing and computer planning report.....	15
Changes to your Mailmark eManifest	15
Confirmed sales orders	16
Cage cards	18
Customer Collection Receipts	19
Mixed weights	19
Combining lists and postings.....	20
Combining eManifests and Mailmark postings	20

Documentation requirements

Sorted postings

You must provide the following documents. Where practical these can be provided in hard copy or electronically to your allocated Regional Distribution Centre:

For all sorted items:

- A computer planning report with or before your first collection on each day
- A standard line listing (for single weight postings or postings where the item weights fall within a fixed price band) with or before your first collection
- A cage card attached to each RSC, pallet or York
- A customer collection receipt with or before your first collection
- A confirmed sales order¹ – this can be provided with the final collection if you have more than one collection during the course of the day
- With Mailmark mailings which have had a confirmed sales order automatically created, an eManifest Confirmation Receipt (eCR) relating to a single confirmed eManifest (to be created and confirmed electronically, by you, via the eMHS for each Supply Chain ID (SCID) per handover date). This must be provided in hard copy with the last collection of the day

For mixed weight postings or postings where items cross two or more price bands, either:

- An enhanced line listing (together with a standard line listing), or
- A daily rate summary sheet

Please note:

For Low Sort items, where trays have been used, a computer planning report and a line listing must show the estimated number of trays based on the maximum weight of mail in a tray.

Failure to provide the correct file/paperwork may delay the processing of your mail

¹ Mailmark customers who are on Autobilling do not have to complete a Sales Order.

Postings with no sortation

You must provide the following documents:

For all items with no sortation:

- A cage card attached to each RSC, pallet or York
- A Customer Collection Receipt, with or before your first collection, and either by hard copy or electronically, to your allocated Mail Centre

For all items with machine-readable options:

- Confirmed sales order - this can be provided with the final collection if you have more than one collection during the course of the day
- With Mailmark mailings which have had a confirmed sales order automatically created, an eManifest Confirmation Receipt (eCR) relating to a single confirmed eManifest (to be created and confirmed electronically, by you, via the eMHS for each SCID per handover date). This must be provided in hard copy with the last collection of the day

For 1st Class and 2nd Class with no additional options:

- A confirmed sales order

For metered mail with Machine-readable options:

- A P3484 form

Please note:

For Business & Advertising Mail with Machine-readable Advanced option postings, it is essential that:

- They are recorded on sales orders without any other product options
- The posting details are accurately recorded
- The sales order is confirmed and presented on the day of posting to avoid risk of incorrect billing

Computer planning report

A computer planning report is produced when a computer sorts an address list in preparation of a posting. It is a plan of intention, and summarises your posting. There is an option to send us one file in xml format that includes all required data from line listing and computer planning report in a standard format. This is not mandatory although data standardisation is an objective of ours.

Purpose of a computer planning report

- Primarily to make the mailing operation easier for you and for us to summarise your posting

When you must submit your computer planning report

- If you have sorted your mail by computer, with the first handover of that posting if there is more than one collection
- If you have used an automated sorting machine to sort your mail, no later than the time of the last collection of that day's mailing on the day of posting

To help us deliver your mail as quickly as possible, when designing your computer planning report, please ensure that:

- It contains all the required information as set out in the table below
- It is easy to read

You will find an example of a well-designed computer planning report containing the required information in Appendix I of this user guide.

Data inputting

- If you are able to put the correct item weight(s) when inputting data into the computer planning report this will help you print the correct number of bag or tray labels and will result in you using the correct number of bags/trays and maximizing bag/tray fill for each selection
- As you may not always know the exact item weight(s) when inputting data into the computer planning report, if the actual weight is different from that set out in the computer planning report, as long as the posting is not mixed weight, you can make an adjustment when placing your order via OBA
- If the item weight is heavier than set out in the computer planning report you will need to make sure you have enough tray or bag labels for each selection

Contents of a computer planning report

Name and address of the poster or contract holder	
Product name:	Advertising Mail Publishing Mail Subscription Mail Business Mail
The class of service required:	1 st Class 2 nd Class Economy Economy deferred
Item format:	letter large letter
Number of Direct and Residue selections or the number of selections (Low Sort)	
Number of bundles, bags or trays (Low Sort)	
Percentage of mail fully and accurately postcoded and addressed against PAF®	
Weight of each item	
Percentage of DPS accuracy (recommended for Mailmark barcode letter & large letter products)	
Job reference number - created by the customer and is unique to the daily posting	

eManifest

Purpose of an eManifest

The eManifest is an electronic record of your Mailmark mailings posted against a non-transferrable SCID on each day. The data within the eManifest, together with the machine processing data validated against it, is used for Batch level reporting.

eManifest requirements and procedure

- eManifests are a requirement for both types of Mailmark barcode mailings - 4-state Mailmark barcode mailings and 2D data matrix Mailmark barcode mailings, and are in addition to a computer planning report and line listing
- An eManifest is created via the eMHS and populated with item level data through a software solution or by the Mail Producer's IT systems. It is required for any Mailmark mailing recorded against a SCID
- One eManifest is required per SCID per day. It is important that you include all item data in the eManifest. If you don't we will see those items as we process them and may invoice you for them.
- Once the eManifest is created, Mailmark mailings are uploaded to each eManifest via the eMHS by the Mail Producer in one or more Batches
- When a Batch is completed it is closed by being submitted, and once all Batches are submitted the eManifest must be confirmed
- Each eManifest will have a unique eManifest ID. This eManifest ID must be included in the 'Your Reference' field on OBA when creating the associated confirmed sales order.

Please note:

Each Batch is considered a mailing in its own right and must meet the minimum volume for the service being used for that Mailmark mailing. It is possible to split a mailing into more than one Batch to make use of Batch level reporting, but each Batch must contain the minimum volume required for the service being used. For example, if you are sending 8,000 Business Mail Low Sort Mailmark items, and wish to split them into more than one Batch, each Batch must contain 4,000 items – the minimum volume for that product option. Please note that, for sorted mailings, splitting Batches may increase the cost of your mailing as you may be producing more Residue selections.

When you must submit your eManifest

- An eManifest is created via the eMHS
- The eManifest can be confirmed up to 28 days prior to the mail handover date
- The eManifest must be confirmed by the latest collection and no later than 6pm on the handover date.

Please note;

If the eManifest is not confirmed by 6pm on the handover date it will be automatically confirmed by the eMHS at 9.30pm.

Failure to create an eManifest

If an eManifest is not created we may process your mail and apply surcharges. Please note that without an eManifest we cannot provide Batch level reporting.

Mandatory fields within an eManifest

The following information is required:

Header:

1. Supply Chain ID (SCID)
2. Mail Originator
3. Date (the date of the eManifest confirmation and the handover date)
4. eManifest status (open, finalised, test)
5. eManifest ID

Detail;

1. Unique item ID
2. Batch ID
3. Address (full address is recommended, only postcode and DPS are required. Recipient details must not be included)
4. Product attributes (class, format, weight)
5. Response Service information (if applicable)

Manual sort reports

If you sort your items manually (i.e. where computers or machines are not involved at any stage of mailing) you do not need to give us a full computer planning report and line listing with your postings (except in the case of mixed weight postings).

However, as a minimum you will still need to provide us with all the mandatory information stated on the full computer planning report and line listing, and the other documentation outlined in this Documentation section.

Please note:

Manual sorting of a Mailmark posting is not recommended. You are still required to complete the eManifest, and the requirement for unique item IDs to be allocated to items makes manual sorting time consuming and complex.

Required basic mandatory information

- Customer name
- Posting date
- Product name
- Details on whether the posting is Low Sort
- Class of service required
- Weight of each item
- Item format
- Full postcode levels
- Number of selections (Low Sort)

- Number of bundles, bags or trays (Low Sort)
- Job reference number

Line listings

In addition to the computer planning report, you must produce a line listing showing the breakdown of the posting, using one line for each selection the mailing is made up of, as per the Royal Mail Selection Files. There is an option to combine the line listing in a single XML file, with the computer planning report.

Purpose of the line listing

The line listing:

- Will help you complete the confirmed sales order so that the total quantity to be dispatched can be easily identified
- Will help your mail room handle your mailings more effectively
- Will reduce errors on sales orders, such as when a posting is split over a weekend or public holiday period
- Can provide a record of when split postings were sent, which helps us monitor quality of service² Allows you to mark your line listings to give us more information. This could be particularly important if you're using geographic sequencing and if you want to check precisely when part of a posting was handed to us

Please note:

The line listing is especially important if you are splitting lists for production purposes and want to keep track of the splits. For example, the list may be split across two or more machines or in blocks of thousands for manual enclosing.

With the line listing, you can keep track of where each part of the list is and when it has been completed, and it will also help you to produce your Royal Mail documentation.

Both line listing and computer planning reports (combined or separate) are required for any Mailmark posting and the Batch or Batches within the individual SCIDs.

Types of line listings

There are 2 types of line listings that you will use:

1. Standard line listing – for single weight postings
2. Enhanced line listing – for mixed weight postings

² Quality of service is measured in posting days (one posting day is defined as items posted by the latest posting time for each day).

Standard line listing

Identical weight posting

If your items are all identical in weight regardless of what type of format they are, only a standard line listing is required.

Mixed weight posting

A standard line listing is acceptable where items are all the same weight or for the following mixed weight profiles:

- A single weight posting, or where the items fall within one fixed price band
- Items vary in weight but no item is heavier than 100g
- Items vary in weight but all items weigh between 101g and 250g
- Items vary in weight and all are over 250g, and you are using the daily rate option as detailed later in this section.

Summary of standard line listing options

Single weight within a single band		
	standard	enhanced
0-100g	✓	✗
101-250g	✓	✗
251-750g	✓	✗
751g-1000g	✓	✗
1000-2000g	✓	✗

A standard line listing must show:

- The name and address of the poster or contract holder
- The date of the posting
- The job reference number
- The item format
- A breakdown of the posting, using one line for each selection the mailing is made up of e.g. information on the amount of items that fall under each SSC
- A cumulative total on each line for items and bags / trays / bundles
- A subtotal for each standard Direct (5 digit) selection code

Enhanced line listing

You are required to submit an enhanced line listing for mixed weight postings.

Mixed weight postings include:

- Items that vary in weight and fall into more than one weight band
- Items that vary in weight and are all over 250g (unless you are using the daily rate method as detailed later in this section)

Summary of enhanced line listing options

Items within weight bands:	MIXED ITEM WEIGHTS WITHIN ONE OR MORE OF THE PRICE BANDS				
	0-100g	101-250g	251-750g	751-1000g	1001-2000g
0-100g	standard	enhanced	enhanced	enhanced	enhanced
101-250g	enhanced	standard	enhanced	enhanced	enhanced
251-750g	enhanced	enhanced	enhanced	enhanced	enhanced
751g-1000g	enhanced	enhanced	enhanced	enhanced	enhanced
1001-2000g	enhanced	enhanced	enhanced	enhanced	enhanced

- Single price 0-100g
- Single price 101g-250g
- Per gram increment 251g-1000g
- Weight based straight line pricing per g 1001g-2000g

An enhanced line listing must show:

- The name and address of the poster or contract holder
- The date of the posting
- The job reference number
- The item format
- A breakdown of the posting, using one line for each selection the mailing is made up of i.e. information on the amount of items that fall under each SSC
- The total number of items within each weight band for each selection
- An individual total for the assumed and actual weights for each weight band selection
- The total assumed and actual weights for each selection

Presenting your line listing

You should present your line listing at the same time as you present your computer planning report (depending on whether you sort your mail by computer or automated sorting machine).

Number of copies;

You will probably need three copies of the line listing:

- One for your own records, which will probably also be marked up by the person placing the sales order on OBA
- One for use on the production line, which may be written on and thrown away once the job is complete
- One to hand to us at the time of the first collection of the posting, or beforehand where possible

Segregated bundle postings

If mail is handed over in segregated bundles, the line listing must show 'bundles' on the paperwork instead of bags or trays.

How to use your line listing when preparing your mail

Using a line listing to mark selection breaks;

- If a mailing is not completed by the latest posting time, mark your copy of the listing in such a way so that the person placing the order on OBA knows how much of the mailing was completed by the 'cut-off' time. They can then use that number of items to place the sales order for that day
- Keeping an eye on where you are in the listing can be very useful for matching bag labels, especially if the sequence accidentally gets out of step. SSCs printed by the addresses make it easy to keep track on the production line
- Marking the listing to indicate which items were collected at a particular time can help you monitor the posting of geographically sequenced postings. This helps you check the quality of service

Using Standard Selection Codes or SSCs

The SSC may be included in the address box. If you do, we recommend that you print the SSC above the name and address³

Printing the SSC within the address box speeds up the production process by:

- helping you recognise breaks when preparing the posting
- reconciling mail with bag or tray labels
-

Changes to your line listing and computer planning report

If you need to amend the computer planning report and line listing to reflect a significant change in the number of items being sent, please notify us immediately and submit an amended computer planning report and line listing showing the accurate totals. In the normal course of events, this should not happen. The correct number of items mailed must always appear on the confirmed sales order.

If you have to delay the mailing date, we will aim to provide a service as soon as possible after you provide final notification that the posting is ready.

³ Please also remember that there are individual product requirements for clear zones for our machine-readable letter and large letter product options which you will need to consider

Changes to your Mailmark eManifest

It is not possible to amend the eManifest once all Batches have been submitted and it has been confirmed.

eManifest and Batch changes

An eManifest can be created up to 28 days before the handover date which is set out in the eManifest and can be changed during this time

Each eManifest must contain at least one Batch. Please note that:

- Once uploaded to the eManifest, a Batch can be amended as many times as required up until the Batch is submitted
- Once uploaded to the eManifest, a Batch can be amended at any time up until the Batch is submitted through the upload of a 'spoils' file. This removes items that were planned to be sent but subsequently were taken out of the mailing. Please see the eManifest Handling System (eMHS) implementation guidelines for details of how to upload a spoils file
- Once uploaded to the eManifest but before it is submitted Batches can be cancelled. In this scenario the item level data (item IDs) which was contained in the cancelled Batch cannot be re-used for at least ninety days if the items in a Batch uploaded to the eManifest are not to be collected on the handover date set out in the eManifest, Batches can be rescheduled by being rescheduled to a later, live, open, eManifest. Batches can be rescheduled on multiple occasions, but the final handover date must not exceed ten days from date of the original Batch upload.
- Remember that eManifests can be set up up to 28 days in advance. Please be aware that a batch can only be moved up to a total of 10 days within this period, which is the maximum time period a batch can be kept live in this manner.

Please note:

- The eMHS does not recognise weekends or Bank Holidays. For example, an eManifest created by the eMHS on a Friday would automatically confirm no later than the following Sunday.

Confirmed sales orders

- For each mailing of sorted items, a confirmed sales order for that working day must be handed over
- Unlike the computer planning report, the confirmed sales order must accurately detail the volumes sent with that day's mailing, as it forms the basis of the invoice
- Where your posting is completed in a single posting day, please complete and confirm the sales order for the whole posting. If you are spreading a posting over a number of days, it is best to complete the confirmed sales order by making reference to your line listing. You must send a copy of the line listing together with the first Customer

Collection Receipt or confirmed sales order. Any subsequent confirmed sales orders should be marked to show to which part of the line listing they refer

An example of the procedure for preparing documentation could be along the following lines:

- Mailroom staff, working with the line listing, prepares the mailing up to the latest posting time, allowing enough time in the schedule to take mail from the end of the production line to the despatching area
- To indicate how far the mailing has progressed, a printed line listing has a line drawn across it, and the date and time is added together with the signature or initials of the operator
- The standard SSC number where the line was drawn is passed on to the person responsible for placing and confirming the sales order on OBA. They input information into OBA and mark the reference copy of the line listing with this SSC. The cumulative item total enables quick and easy completion of OBA. Care must be taken to subtract the previous day's total if the mailing is spread over more than one day
- The confirmed sales order is then handed over with the last collection of the posting day to which it refers. If the confirmed sales order is for a part of a posting, the range of SSCs which apply to that confirmed sales order are written on the confirmed sales order
- The customer copy of the line listing is marked at each end of each working day to show how far the mailing has progressed. This prevents errors and gives an instant reference of how the mailing is progressing during each working day
- Confirmed sales orders must be presented to us with mail available for collection up to the latest posting time on the posting day, detailing all mail collected on that day.

Please note:

- The figures on your confirmed sales order may differ slightly from the computer planning report. This is to allow for late changes, which may include:
 - a different mailing weight
 - production changes due to wastage during machine enclosing
 - a lower print run
- All changes resulting from production difficulties must be reflected in the confirmed sales order

Cage cards

For each collection by, or delivery to, Royal Mail, you must affix cage cards correctly and securely to each RSC, pallet or York ensuring it is clearly displayed, using adhesive tape or string, to indicate the contents.

Purpose of cage cards

Cage cards help us identify your mail at the accepting office in order to maintain a record of what mail has been collected and to ensure the contents get the correct treatment and are recorded against the appropriate job and customer. This helps us identify consignments on arrival at the distribution centre.

Contents of a cage card

A cage card must contain:

- Mailing house and customer name (if your posting is being handled by a mailing house on your behalf)
- Customer code or job reference number
- Account number to which the mailing should be billed
- Product details
- Format of the mailing
- Date/day the mailing is being collected by or delivered to us
- Handover point
- Either the title or job number
- Volumes by class and format for each product
- The number of bags in each RSC together with the total gross weight (including mail and the RSC) of each RSC.

Please note:

- If you include details of the selections contained within the RSC this can help with your quality control process and helps us process your mailing more efficiently
- For deferred mail there is a deferred customer cage card which must be used to identify the 'commence delivery' date

Customer Collection Receipts

A Customer Collection Receipt must be completed for each collection. It indicates the number of RSCs collected and the product option used.

Purpose of Customer Collection Receipts

- They provide a record of what, how much, and when, mail is collected
- They help us determine if extra collections are needed and provide you with the correct number of empty RSCs

Completing your Customer Collection Receipt

- You fill in sections 1–3, giving collection details, and including requests for equipment and extra collections
- The Royal Mail driver completes section 4
- You and the driver each sign the Customer Collection Receipt. You keep the top copy
- We use a copy of the Customer Collection Receipt to help monitor your mailing.

A member of your Royal Mail account team will visit you to explain our system and to hand over a supply of cage cards and Customer Collection Receipts before your first posting is made.

Mixed weights

You may include items of mixed weights and/or formats providing that they are all priced as if they were the largest format. You must provide:

- The appropriate mixed weight documentation, including an enhanced computer planning report or, for items over 250gms, the paperwork for the daily rate option, and a line listing where applicable for all mixed weight mailings whether sorted by computer, automated sorting machine or manually (see later in this section)
- A Customer Collection Receipt
- A confirmed sales order

Combining lists and postings

Advertising Mail, Business Mail products allow a combination of postings from different customers, but in such cases, all the individual chosen product presentation criteria must be met.

This means that either address lists need to be combined at source to form one overall posting, or separate postings need to be further sorted (either manually or by automated sorting machine) to ensure a single overall sortation. If this option is chosen, there must only be one computer planning report and one line listing showing a single set of Directs for Low Sort items.

Please note:

- If the mailing contains mixed weights, the appropriate mixed weight documentation must be provided
- For Publishing Mail you cannot consolidate or combine mailing lists for different publications

Combining eManifests and Mailmark postings

- It is not permitted to mix SCIDs within a single eManifest
- It is not permitted to transfer SCIDs to different Participants
- Postings which have the same SCID must be physically separated by format, class, product and for sorted products have the individual sets of paperwork.(line listing & computer planning report per job)
- The only information which must be combined in the same eManifest are the different batches for the same SCID

Appendix I - Example of a computer planning report

XYX Company*
123 A Street
POST TOWN
postcode

Advertising Mail* Date: xx xx xx
Job Reference number: 1427A*

Advertising Mail Service	3 *			
Minimum Direct selection size	50 or 10 *			
Weight of item	99g *			
Format	(letter, large letter) *			
International Business Services with CountrySort High	Priority			
Volume option - Service				
PRESORTATION STATISTICS				
Address records processed	21482			
postcodes matched	20321			
Post towns matched	347			
Addresses not matched	814			
POSTCODE STATISTICS				
(% of address records processed)	94.0 *			
Full postcode	1.8			
Outward postcodes only	95.8			
postcode Level	4.2			
No postcode	-			
SORTATION STATISTICS				
	NUMBER	ITEMS	% MATCH	BAGS
Direct Selections	208	10551 *	42	322*
Residue Selections	81	10117 *	41	159*
Int. Business Mail Country Sort High Volume selections	1	4261 *	17	63*
Totals	290	20668 *	100	481*
COST & DISCOUNTS				
Number of items	20668			
Item Weight (g)	99			
Postal Rate (p)	p			
Straight-line item cost	p			
Straight-line total cost	£			
Direct selection discount				
(10551 items at xx)	(£)			
Residue selection discount				
(10117 items at xx)	(£)			
Discounted cost	£			
TOTAL DISCOUNTED COST	£			

* mandatory information but please refer to the section on line listings for full details

Appendix II - Example of a Standard Line Listing

Selection Code	Selection Name	No. of items	Cumulative No. of items	Estimated No. of bags	Cumulative No. of bags
99891	Priority International items	2931	2931	41	41
99895	Economy International items	214	3145	5	46
12558	Wigan WN1, WN3	114	3529	1	47
12559	Wigan WN2	49	3308	1	48
12561	Wigan WN4	84	3392	1	49
12562	Wigan WN5	75	3467	1	50
12563	Wigan WN6	34	3501	1	51
12564	Winsford CW7, CW10	28	3529	1	52
12601	Bootle L20	89	3618	1	53
12602	Bootle L21	47	3665	1	54
12603	Bootle L30	46	3711	1	55
12604	Crosby L22-L23, L29	44	3755	1	56

Appendix III - Example of an enhanced line listing Mixed weight, mixed weight bands – large letters

XYX Company* 123 A Street POST TOWN postcode		Business Mail with High Sort large letter* Date: xx xx xx Job Reference number: 1427A*													
SSC*	Name*	Total Items*	Total Bags*	Cum Items*	Cum Bags*	Items up to 100g*	Actual Weight*	Assumed Weight*	Items 101g-250g*	Actual Weight	Assumed Weight	Items 251g-750g*	Actual / Assumed Weight	Total Actual Weight	Total Assumed Weight
12559	Wigan WN2	114	1	114	1	70	3500	7000	30	5000	7500	4	1200	9700	15700
12561	Wigan WN4	49	1	163	2										
12562	Wigan WN5	84	1	247	3										

- Items between 0–100g have an assumed weight of 100g, since it is a single price for items up to 100g
- In the example above, assumed weight equals 7000g i.e. 70 items x 100g to give a maximum assumed weight of 7000g
- Items between 101–250g have an assumed weight of 250g, since it is a single price for these items up to 250g
- In the example above assumed weight equals 7500g i.e. 30 items x 250g to give a maximum assumed weight of 7500g
- Items greater than 250g are priced by g, hence actual weight = assumed weight
- In the example above 4 items = 1200g actual and assumed weight
- Total assumed weight in this example = 15,700g

In the above example the mailing falls between 0-750g and therefore all columns are populated. However, if the mailing only consisted of items from 101-750g then only those columns would be filled in, or if the mailing only consisted of items over 250g then only that column would be filled in.