

EII User Guide for DAT-MAIL

User Guide

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Getting Started

DAT-MAIL Program Setup

Program Setup for EII

DAT-MAIL Program Setups and Defaults

Program set ups are accessed from the "File" menu. A grouping of Setup Tabs will appear. ("Import Defaults" tab information can be found here)

Mailer Information Tab

The screenshot shows a Windows-style dialog box titled "Setup" with a close button (X) in the top right corner. The dialog has a tabbed interface with the following tabs: "Container Tare Weights", "Export/Archive", "Advanced Settings", "Pallet Tracking/Intelligent Mail", "Maintenance", "Import Defaults", "Mailer Information", "Planalyzer", "PostalOne!", "Statement Generation", and "Start Up Options". The "Mailer Information" tab is selected and contains the following fields and options:

- Mailer Information:**
 - Mailer: Mailer Duns:
 - Address 1: MID:
 - Address 2:
 - CRID:
 - City:
 - State: Zipcode:
 - Phone: IDEAlliance User License Code:
 - CSA ID:
 - CSA CSV File Location:
- Origin Post Office:**
 - Entry Zip Code: (5 digits) Locale Code: ZIP+4: (5 or 9 digits)
 - DMU Verified BMEU Verified
- DMU Verification:**
 - Allow USPS access to maintenance functions
 - Do not allow USPS to import mail.dat files
 - Display Mail Sortation Reports for USPS

At the bottom of the dialog are "OK" and "Cancel" buttons.

Enter all of your pertinent Mailer information including name, address, IDEAlliance Provider Code and DUNS here.

DMU Verification Allow USPS Access to Maintenance Functions - This option will allow the USPS terminal to run Internet Updates and other program maintenance functions. This is only recommended if they are using a standalone (local) copy of the DAT-MAIL program.

TIP ! If they are connected to your live network program, leave this unchecked.

Do Not Allow USPS to Import Mail.dat Files - This option removes the import icon and File Menu options when the program is in DMU Mode. Checkmark this option if your DMU clerk is using files on your network.

Display Mail Sortation Reports for USPS - This option provides access to the sortation reports from the "Reports" menu if the USPS is using DAT-MAIL to do verification and mail acceptance.

Planalyzer Tab

The screenshot shows the 'Setup' window with the 'Planalyzer' tab selected. The window has a title bar with a close button (X) and a menu bar with the following items: Container Tare Weights, Export/Archive, Advanced Settings, Pallet Tracking/Intelligent Mail, Maintenance, Import Defaults, Mailer Information, Planalyzer, PostalOne!, Statement Generation, and Start Up Options.

Under the 'Planalyzer' tab, there are two sub-tabs: 'Standard/Pkg' and 'Periodicals'. The 'Standard/Pkg' sub-tab is active and contains the following options:

- Entry Rules:**
 - NDC/Origin
 - SCF/NDC/Origin
 - DDU/SCF/NDC/Origin
 - NDC Only
- Skip MxNDC pallets (except courtesy pallets)
- Protect Origin Pallets

Below these are several checkboxes:

- Use Planalyzer
- Enter loose containers at Origin
- Send Origin Containers Priority Mail Open & Distribute
- Exclude PR/HVAK
- Send non-qualifying Mxd trays/sacks Origin

At the bottom left, there is a text field labeled 'Origin Entry Zip:'.

On the right side of the window, there is a 'Minimums' table with four columns: Pieces, Pounds, Containers, and Pallets. The rows are DDU, SCF, NDC, ADC, and TXH. Each cell in the table contains the number '0' and a small up/down arrow icon.

	Pieces	Pounds	Containers	Pallets
DDU:	0	0	0	0
SCF:	0	0	0	0
NDC:	0	0	0	0
ADC:	0	0	0	0
TXH:	0	0	0	0

At the bottom right of the window, there are 'OK' and 'Cancel' buttons.

Planalyzer (or Quick Plan) - Use this tab to set up default parameters for running drop ship optimization on your files immediately after import via the "run Freight Table after Import" checkbox on the "General" tab. If you have our Toolbox registration, you can check the "Use Planalyzer" box and choose a Freight Table to perform cost-based drop ship optimization.

PostalOne! Tab

Default PostalOne! Release Path - Use this button to browse and select the path you want to place the Mail.dat release files generated by DAT-MAIL for uploading to PostalOne!. **Note:** You can Suppress the export of an Original Release file to the PostalOne! website Fill in your Mailing information here for the PostalOne! release file.

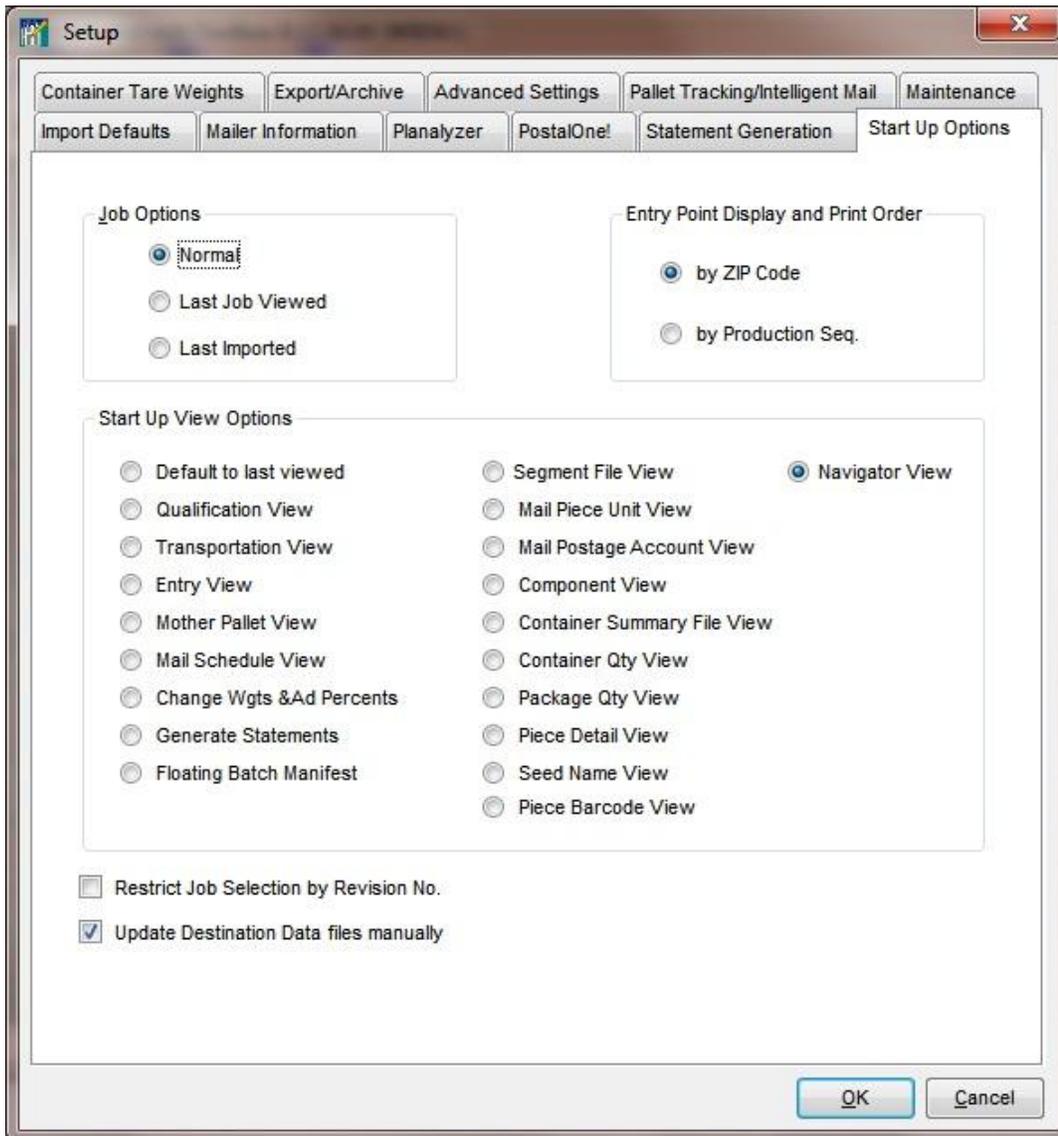
Business Entity ID - When this six-character numerical field is populated, the information is then embedded and displayed in the FAST Barcode on your printed Pallet Placards. The USPS will tell you what your specific Business Entity ID is and any fields not used will be padded with leading zeros.

Generate Statements or Only Create Release Files - choose one of these radio buttons. If you do not plan on generating postage statements from your Mail.dat files and will only be participating in PostalOne!, then you should uncheck Generate Statements. Login Info and Permit

Info buttons give you a place to access, enter and edit the applicable information necessary for participation in PostalOne! Web Services. These setup buttons are for a feature that allows you to upload your Mail.dat qualification reports and postage statements to the USPS website for verification.

TIP ! Review our supplemental guide titled PostalOne!, FAST and Detached Mail Unit Verification User's Guide for detailed information regarding the setup, activation and use of PostalOne! through DAT-MAIL.

Startup Options Tab



Job Options - The list of Jobs that are imported into the program can be sorted by one of these selections.

Entry Point and Display Order - Choose either by ZIP code or by Production Seq.

Start Up View Options - After a Mail.dat file is imported, you can choose a default View that the program will display for you. The default is the "Navigator" view.

Restrict Job Selection by Revision No. - If you tend to import the same Job multiple times due to changes in presort processing, you can choose to activate this option which will allow only the latest file revision to be selected for editing.

Statement Generation Tab

The screenshot shows the 'Setup' window with the 'Statement Generation' tab selected. The window contains the following elements:

- Client:** A text field containing 'CLIENT' and a browse button.
- Permit:** A text field containing '1' and a browse button, with the address 'Boston MA 02114' displayed next to it.
- Checkboxes:**
 - Optional Procedure
 - Generate 8125/8017
 - Drop Ship
 - Update Container Grouping ID to Zip-Ref
 - Generate Statements Automatically at Import
 - Set Import Date and In-Home Delivery Date to 0
 - Export PO! Update Release File Automatically
 - Run POWS Qualification Report before Stmt Generate
 - Print Statements Automatically
- Buttons:** 'Auto Print Settings' and 'Generate Statements by: Entry Zip Delivery Zip'.
- Applied Method:** A dropdown menu set to 'Neither'.
- Balance Paid By:** A dropdown menu.
- Applied Rate:** A text field containing '0.0000'.
- Permit/Trust:** A text field and a browse button.
- Carrier:** A text field and a browse button.
- Automatic Client Identification:**
 - Not Activated
 - First Characters of File Name
 - First Characters of Original Job ID
 - Characters of Header User Option Info
- Automatic Job Identification:**

	Start Pos	Length
Job:	0	0
SubJob:	0	0
Lot:	0	0
- Automatic Mailing Agent Identification:**
- Buttons:** 'OK' and 'Cancel' at the bottom right.

Client/Permit- Enter defaults for Automatic Statement Generation. The default Client will be used during automatic statement generation in conjunction with our Daemon or single file import process if the option to 'Generate Statements Automatically at Import' has been activated.

Optional Procedure - Check this checkbox if the bulk of your mailings are verified under an Optional Procedure agreement. At the time your statements are to be generated, you can choose to uncheck the Optional Procedure box if the mailing is not part of your OP agreement.

Generate 8125 - Recommended if you will be generating postage statements for destination drop ship entry points. An 8125 will be created automatically from your statements.

Drop Ship - This controls whether or not a Consolidated statement will be generated for your drop ship mailings. This setting can be overridden at the time of statement generation from a

single file import or through automatic statement generation from a single file import. This setting is ignored by our Daemon which uses a different technique to automatically detect drop ship from non-drop ship files.

Update Container Grouping-ID to Zip Ref - The update Container Grouping-ID to Zip-Ref will update your Group 1 Batch Code or Postalsoft Entry Point Number to the Zip Reference field of the statement. When you print a 3602-RV, the Zip-Reference number can print in each statement section.

Generate Statements Automatically on Import - This turns on the feature that allows you to generate statements automatically after the Mail.dat import is complete. This feature can be used when you do NOT need to make any changes to your Mail.dat file in relation to entry facility.

Set Import Date and In-Home Delivery Date to 0 - If you are generating your statements automatically upon import and do not want them to have either mail dates or in-home dates, enable this option. When statements are created, the rate table used will be based on your computer's system date. When the mailing actually takes place you can change the postage statement's date. This way it is easy to tell the difference between statements for mailings still in production vs. statements that have actually mailed. If you are registered for DAT-MAIL PostalOne! Web Services, you will also see a checkbox.

Run POWS Qualification Report before Statement Generate - Note: This is an obsolete setting and will be removed from future versions of the program.

Applied Postage Information - These defaults will be used if you are creating a statement with affixed postage but they can be changed if you are not using the Automatic Statement Generation feature.

Applied Method: If you select Neither, you can enter the applied rate. This rate should be equal or lower than the lowest postage rate being mailed. **Lowest** - This automatically applies the postage for each entry point at the lowest postage rate used by each entry point. If not all entry points are being mailed at the same rates and you are applying the postage at the same rate for all entry points, it is best to select **Neither** and enter that rate. **Correct** automatically applies the correct postage.

Balance Paid By: If you have applied the postage at a "Neither" or "Lowest" Rate, there will be postage due for the mailing. You must select a payment method for this balance. If you select "Permit" or "Trust", you must also select the permit/trust account that is being used.

Permit: If the balance is paid by permit, select this option and select a permit. According to DMM regulations you must also create a 3600-R, 3602-R or 3602-N for this additional postage. If you do not do this and are using the Postage Accounting program, this postage usage will not be allocated to the job. If you do not create these extra statements, then you are really using your permit as a trust account and should choose "Trust" instead.

Trust: Selecting "Trust" still requires you to select a permit but you do NOT have to create an additional postage statement for the balance due.

Meter: If you are applying a meter strip on the postage statement to pay for the balance due, select "Meter".

Stamps: If you are applying stamps on the postage statement to pay for the balance due, select "Stamps".

Check: If you have an arrangement where you are directly paying the balance due by check, select this option. If you are expecting a value added refund however, this will be the selection to make since the overpayment is not applied to a permit or trust account.

Automatic Client Job and Mailing Agent Identification Options

When activated these options are used with automatic statement generation during the Mail.dat file import (using the Import Daemon or during a single file import).

The screenshot shows two panels. The left panel, titled "Automatic Client Identification", contains four radio buttons: "Not Activated" (selected), "First Characters of File Name", "First Characters of Original Job ID", and "Characters of Header User Option Info". To the right of the second and third radio buttons are input fields for "Start Pos:" and "End Pos:", both containing the value "0". Below these panels is a checkbox labeled "Automatic Mailing Agent Identification" which is currently unchecked.

The right panel, titled "Automatic Job Identification", contains a table with two columns: "Start Pos" and "Length".

	Start Pos	Length
Job:	0	0
SubJob:	0	0
Lot:	0	0

Automatic Client Identification Radio Button Choices:

"Not Activated" (Default) turns the option off. When any of the other three radio button options are selected the feature is considered ON and parses the Client code from the three possible sources (File Name, original job id, or hdr:UserOption).

"First Characters of File Name" (must enter end position) - this is the name of the Mail.dat file set itself (i.e. datjob.hdr)

"First Characters of Original Job ID" (Job Number) (must enter end position) - can be used in conjunction with Job Parsing "Characters of Header User Option Info" (must enter Start and End Pos.) - most presort programs will allow information to be entered into the header for use with this option.

Automatic Mailing Agent Information - When ON, during Mail.dat file import the company will be derived from the Verification Facility Zip found in the first Segment record. This zip is compared against all zips in your Mailing Agent file and if a match is found then that company is the one used during statement generation.

Automatic Job Identification - DAT-MAIL has statement generation options which can create separate statements for each Job, Version (lot) and payment type (Permit, Meter and Stamps) and tie them to a single consolidated statement for each payment type that can serve as a commingled statement.

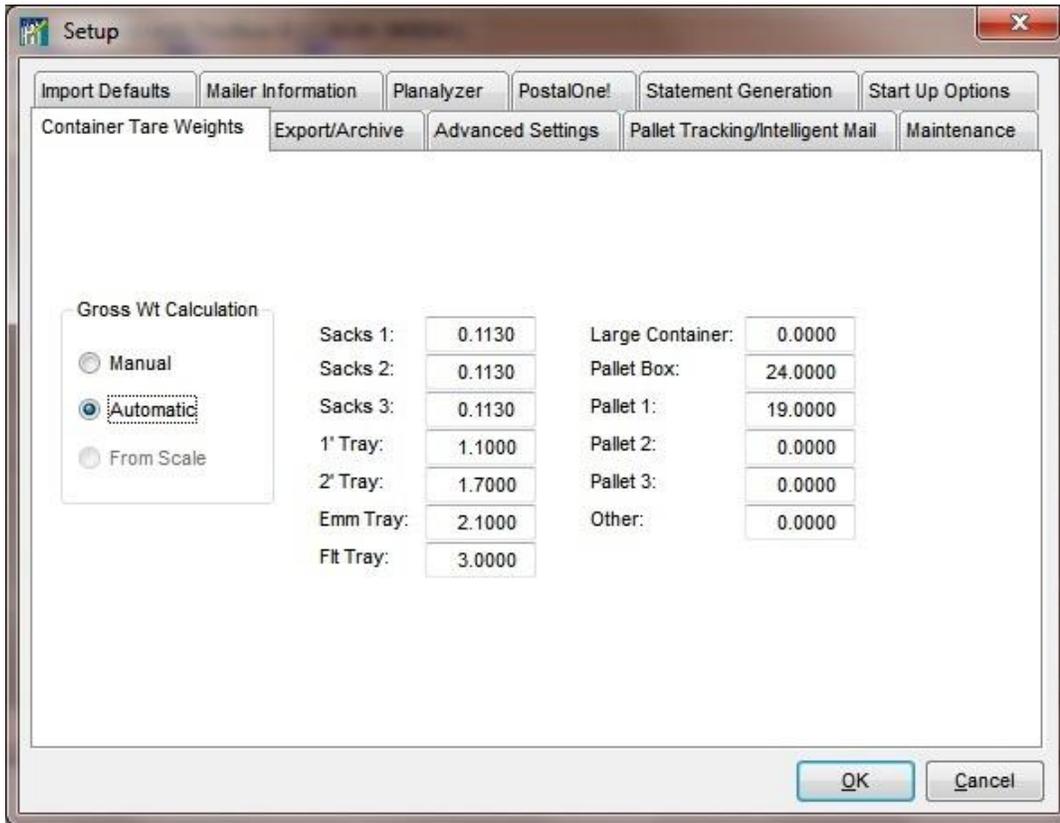
To setup the parsing, you must define how the MPU Description is parsed under Automatic Job Identification. Enter the info on the Job and the Lot (usually referred to by mailers as package, copy or version). If the mailer is not adding a SubJob to the Job, this can be left empty. When we import this information, the SubJob is added to the end of the Job number and the two are separated with a dash. For instance: Job 1234 / SubJob 001 / Version 001 will be represented as **Job 1234-001-001**.

The parsing information to enter looks like this:

Job: Start 1, Length 4

SubJob: Start 5, Length 3
Version: Start 9, Length 3

Container Tare Weights Tab



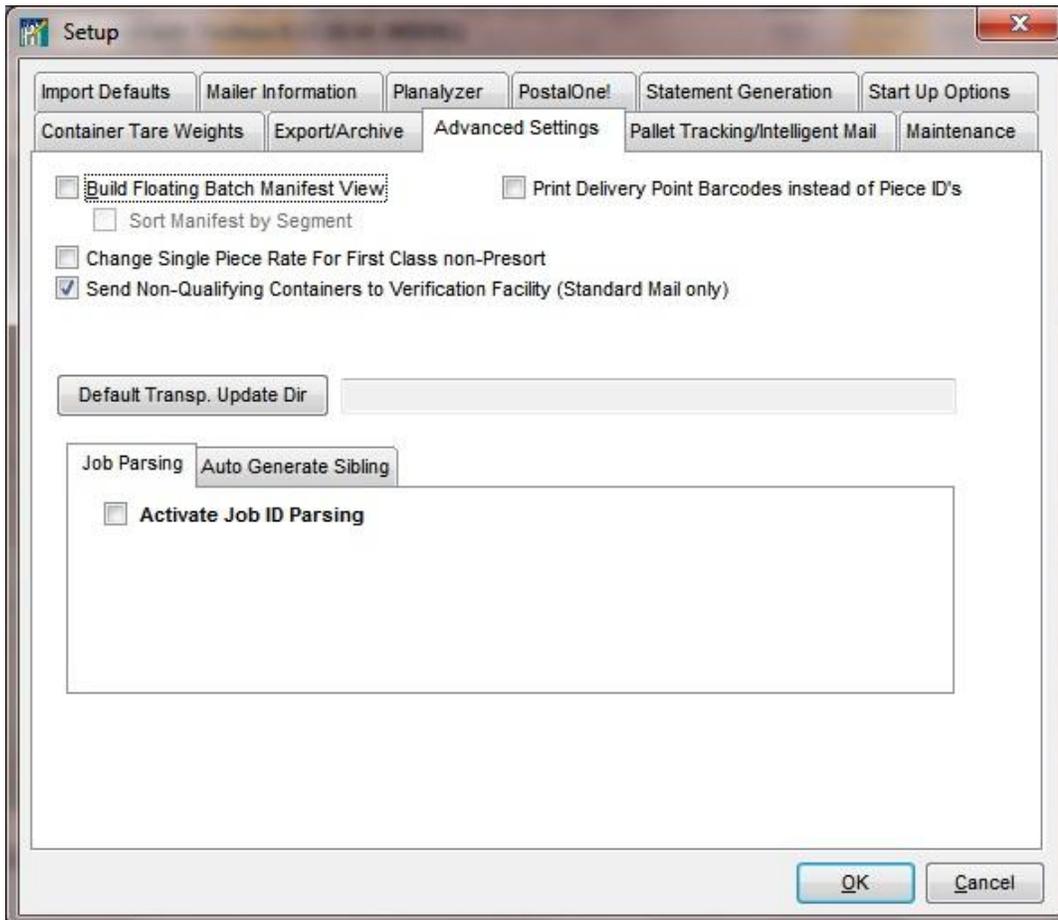
The screenshot shows a 'Setup' dialog box with the 'Container Tare Weights' tab selected. The dialog has several tabs at the top: Import Defaults, Mailer Information, Planalyzer, PostalOne!, Statement Generation, Start Up Options, Container Tare Weights (selected), Export/Archive, Advanced Settings, Pallet Tracking/Intelligent Mail, and Maintenance. The 'Gross Wt Calculation' section has three radio buttons: 'Manual', 'Automatic' (selected), and 'From Scale'. Below this are two columns of input fields for container weights.

Container Type	Weight
Sacks 1:	0.1130
Sacks 2:	0.1130
Sacks 3:	0.1130
1' Tray:	1.1000
2' Tray:	1.7000
Emm Tray:	2.1000
Flt Tray:	3.0000
Large Container:	0.0000
Pallet Box:	24.0000
Pallet 1:	19.0000
Pallet 2:	0.0000
Pallet 3:	0.0000
Other:	0.0000

At the bottom right of the dialog are 'OK' and 'Cancel' buttons.

Container Tare Weights - Most all of our reports include the Gross Weight of your containers. We have provided some default values which you may override here.

Advanced Settings Tab



Build Floating Batch Manifest View – If you are a manifest mailer, check this option to build the floating batch manifest during your file import. The "PDR" file must be populated with piece ids by your presort program. You also have an option to sort this information 'by Segment'.

Print Delivery Point Barcodes instead of Piece IDs - (This feature is no longer used and will be removed).

Change Single Piece Rate for First Class non-Presort – When activated, the program interrogates the Mail.dat file that is being imported and if it finds that all of the mail is Single Piece rate, it updates the related MPU and sets the Rate Schedule Type value to "Retail".

Send Non-Qualifying Containers to Verification Facility (Standard Mail only) - During import, when active, this option will detect 'S' rate categories in STD Mail files and change their entry point(s) to that of the related segment record's verification facility zip.

FULL JOB PARSING SUPPORT!

Here is what you will have access to:

Job Parsing allows mailers to use a convention of combining Job # and Lot/String/panel into a Job ID. DAT-MAIL will then parse this information when we generate statements so that the job

number and lot get populated correctly and automatically. For example, you may have 5 Mail.dat files for the same job, one for each "lot" in the job. If the Job no. was 5 characters and the lot was 3, you would set the parsing so that the first 5 characters of the Job ID read Job and the next 3 read Lot.

Populate blank container grouping from Segment Description – In conjunction with Job Parsing, if your presort program does not populate the Container Group ID field in your container file, you can enable us to do it using a specified start/end position from your Segment Description information. The maximum character length of the Container Group ID is nine.

Auto Generate Sibling – In conjunction with the setup option box on the Import Defaults tab to 'Create Sibling Records on Import', you can specify additional default options. Select a default container type for your trays/pallets. Choose which type of import (manual or daemon or both) should create sibling records. Also, choose whether or not these sibling records should be deleted when the file is exported and specify which type of export.

Export / Archive Tab

Setup

Import Defaults | Mailer Information | Planalyzer | PostalOne! | Statement Generation | Start Up Options
Container Tare Weights | **Export/Archive** | Advanced Settings | Pallet Tracking/Intelligent Mail | Maintenance

Drop Export Settings

Export Path Name

Drop Start ID: 0

Export Format

CSV, tab delimited
 XML
 Pro-Mail 4

Activate Open & Distribute Exports

PMOD Export Path

Mail.dat Export Settings

Default Export Directory

Export physical zips as Locale Codes Export mail.dat to compressed file
 Auto-calculate CSM gross weight Export to version: 13-1 (current) v
 Export using Historical JobID Create OCI
 Update Sibling Container Mailing Field (SEG-1117) on Export
 Do Not Export UPA Use Alpha/Numeric File Naming Convention

Spoilage P1! Export Default: X - Wasted piece, DM will adjust

Archive Settings

Default Archive Directory C:\WB\mail.dat\archive

Archive files older than 45 days.

USPS Approval Required to Archive

OK Cancel

Drop Export Settings:

If you plan to generate files describing each 'drop' being made in a job, you can enter the starting drop number here. In the Mail Schedul View you can now identify which dates each entry point or entry point/segment combination will be mailed. An export button will create CSV tab-delimited or an XML file which will include all information needed by a work ticket and setup a 'drop' for each entry point for each mailing date.

Use the "Export DSV" to export a tab-delimited file with columns for:

Job Number, Package, Drop ID, Mail Date, First in Home Date, Last In Home Date, Piece Weight, Mail Class, Processing Category, Non-Standard Flat, Non-Profit Flg, Permit Number, Container Type, Payment Method, Facility Type, Entry Point, Facility Name, Rate Code, Rate Description, Postage Rate, Postage Amount, Pieces, Container Group ID, Destination Entry, and Zone as applicable

Activate Open and Distribute Exports - This feature is used in conjunction with Window Book's

Postal Package Partner (PPP) program. Dat-MAIL subscribers can open their Mail.dat files, go to the Mial Scheudle View, tag the entry facilities for which they wish to create Priority drop ship labels and export program can then import the Priority Mail drop ship data in a few mouse clicks, allowing users to get these records and print their labels in batch mode. This PPP feature enables the industry-leading postal mailing and shipping software systems to work together, creating a more streamlined overall system for mailers and shippers who are eager to process Priority Mail drop shipments more quickly and efficiently.

Mail.dat Export Settings:

Export physical zips as Locale Codes - This feature will populate the physical zip fields in the .CSM file with locale codes upon export for non-PostalOne! exports. PostalOne! exports are now required (as of 8/14/2006) to export locale code and the export process will do so regardless of this new option. The locale code is the facility site code of the destination minus the first digit. For example, the facility site code for SCF HARTFORD CT 060 is EV20284 and the locale code is V20284.

Auto-calculate CSM gross weight - This option will automatically recalculate the gross weights in your files upon import using the container tare weights you have defined.

Export using Historical JobID - You can choose to keep your originally supplied Job ID in your Mail.dat file when they are exported instead of using DAT-MAIL's Job ID that is uniquely assigned each time a file is imported.

Update Sibling Container Mailing Field (SEG-1117) on Export - This setting should be used if you encounter PostalOne! validation errors where the Sibling fields are expected to be populated.

Do Not Export UPA - This option will suppress your UPA file (if supplied) from being exported when you perform a Regular or PostalOne! file export.

Export mail.dat to compressed file - This option will zip your Mail.dat file when you perform a Regular or PostalOne! file export.

Export to version - There are times when a Mail.dat specification is in transition and you may prefer to keep exporting the prior version rather than using the newest supported version.

Create OCI - You can choose to have the optional OCI file created and included in your Regular or PostalOne! file exports.

Use Alpha/Numeric File Naming Convention - This option will ensure that your PostalOne! file names are unique for a much longer period of time. This is often used by mailers who submit thousands of files to PostalOne! in a given year.

Spoilage P1! Export Default - The recommended settings for PostalOne! would be to choose either W or S.

Archive Settings:

Allows you to select and set an Archive Default Directory as well as the parameters for archiving by date. A checkbox allows you to force USPS approval before Archiving any Mail.dat files.

Archiving is essential for two reasons...

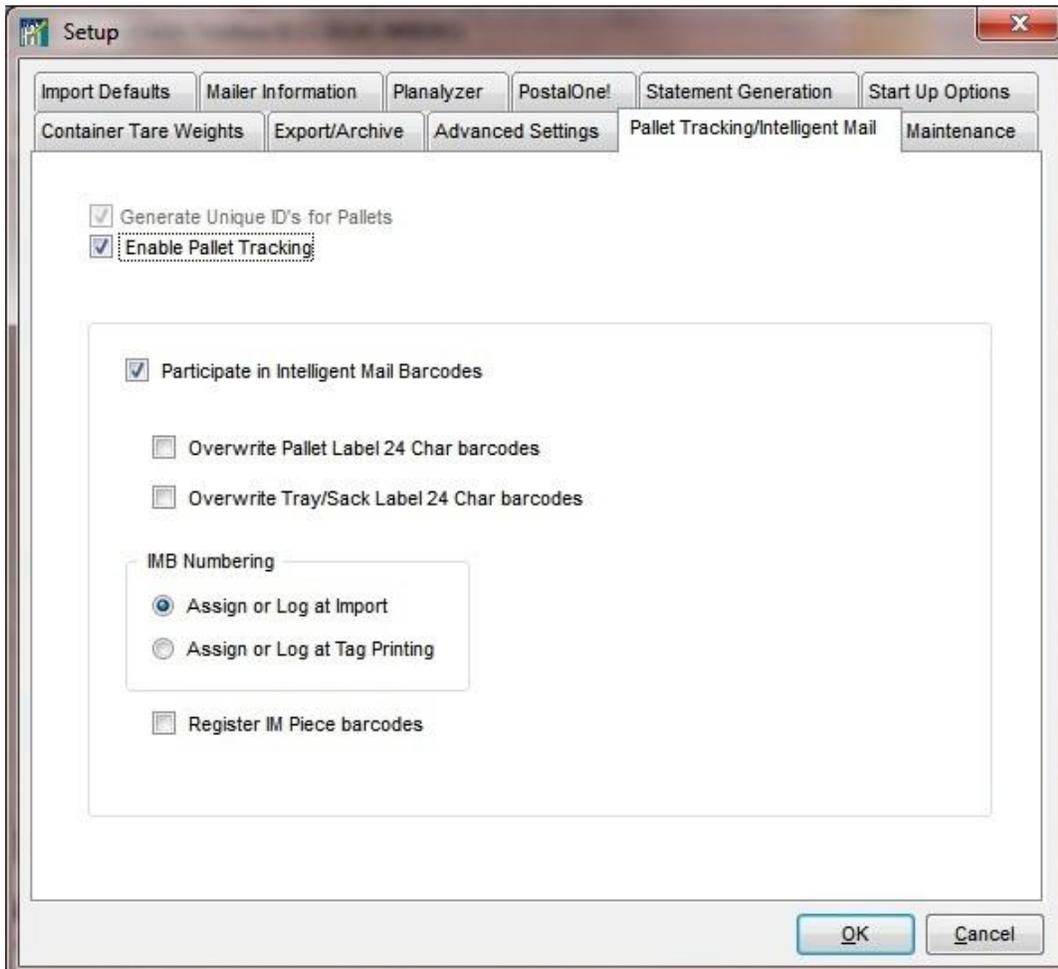
1. It keeps your Job List from being overpopulated with mailings that are completed.
2. If you are mailing under an Optional Procedure agreement, you are required to retain your job information for at least a period of one year.

When you choose to archive, DAT-MAIL automatically puts your file into a zipped format to reduce the space requirement.

Using a Command Line to Semi-Automate:

The Mail.dat archiving utility can be run from a command line. MDARC.EXE can be followed by /A=<No. of days> and /D=<folder to put the archive files>. When it is launched with these command lines, there the screen displays an archive time. You set it to a specific time (ie. 2:00 am) then start the archive, then minimize. Every day at the allotted time it will archive all Mail.dat files over the number of days specified with /A= and place the archive files in the folder specified by /D=.

Pallet Tracking / Intelligent Mail Tab



Enable Pallet Tracking - This feature automatically activates "Generate Unique ID's for Pallets" when selected. All uniquely numbered Pallets will be added to our pallet tracking database.
Note: this is a critical setting if you are using the D.I.M.E. interface for RR Donnelley.

For Mailers participating in Intelligent Mail Container Labeling:

Participate in Intelligent Mail Barcodes - by activating this setting, our program will either assign unique IM Codes or log your unique IM codes.

Overwrite Pallet Label 24 char barcodes - choose this option if you would like the program to generate your unique IMCL codes.

Overwrite Tray/Sack Label 24 char barcodes - Choose this option if you would like the program to generate your unique IMTL codes.

IMB Numbering:

Assign or Log at Import - Choose this option if you would like the program to create or log

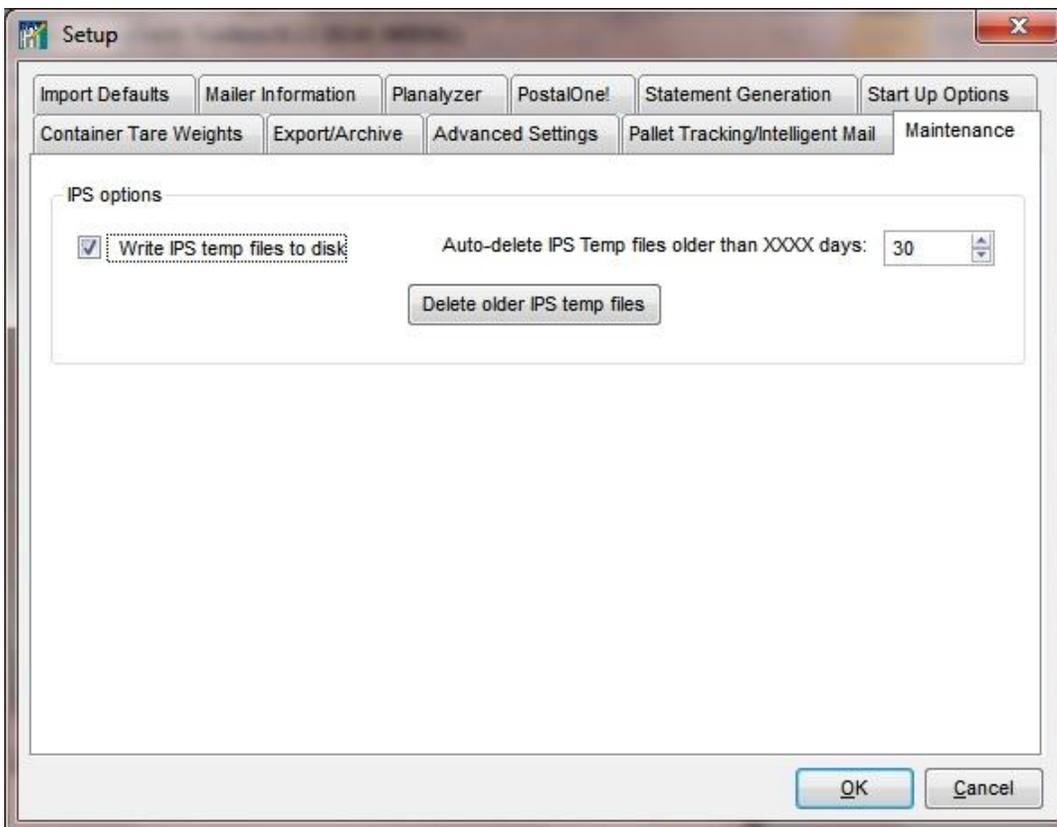
your unique IMTL/IMCL codes when your files are imported.

Assing or Log at Tag Printing - Choose this option if you would like the program to create or log your unique IMTL/IMCL codes when you are printing Tags/Pallet Placards.

TIP ! IMTL/IMCL codes will **only** be created if you have the "overwrite' options selected.

Register IM Piece Barcodes - Activate this option if you would like the program to write your unique IM Piece barcode to our MS SQL Database. when the IM Piece barcodes are in the MS SQL database, we can query that table when you want to apply spoils/shorts.

Maintenance Tab



The settings shown here are helpful to Window Book's Support Technicians and should not be changed.

Statement Setup for EII

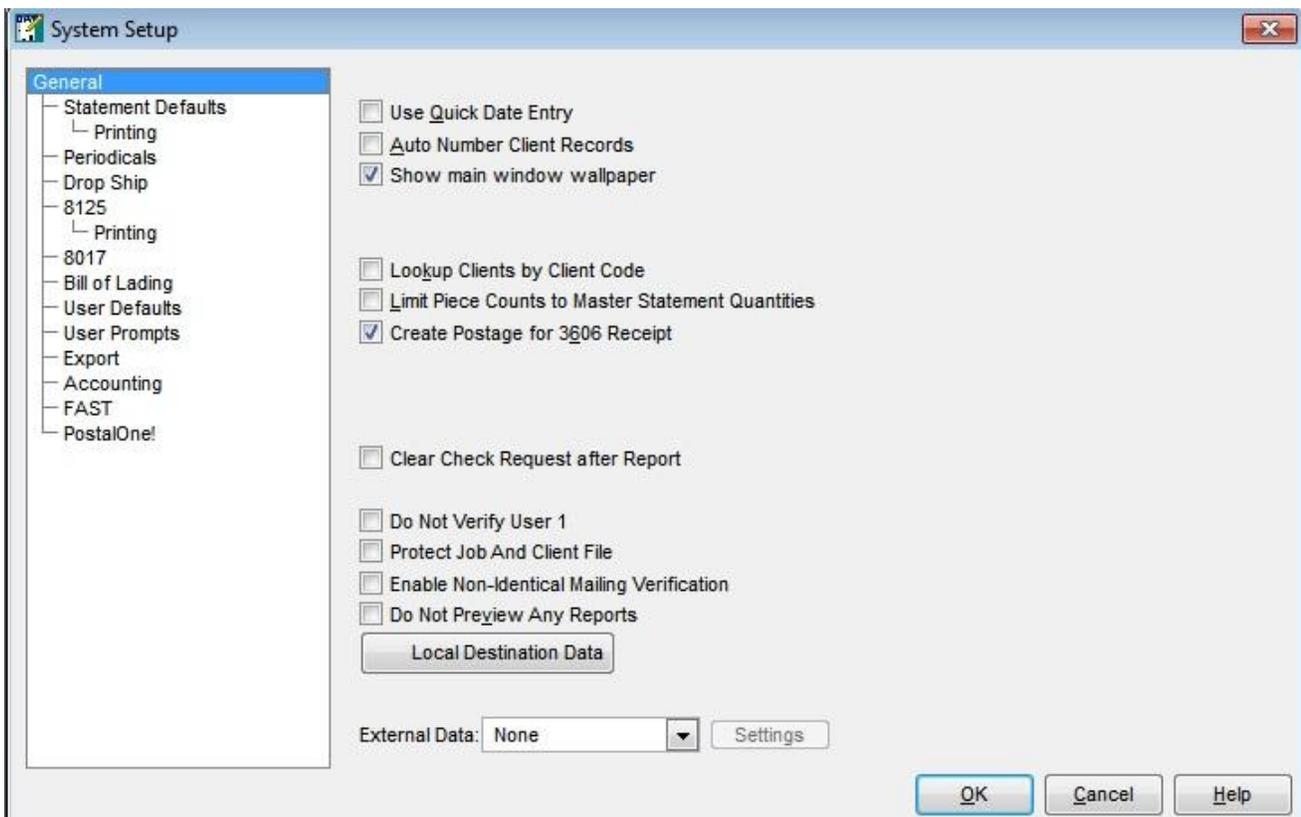
Statement Setups

DAT-MAIL Statements can be generated in two ways:

1. Statements can be generated from a Mail.dat file.
2. Statements can be generated via data entry, without the need for a Mail.dat file.

Access Statements via the 3602 Icon  on the toolbar or via the Utilities => Print Statements menu. To access your DAT-MAIL Statements Set Up Tabs, open the DAT-MAIL Statements section of the program by clicking on the 3602 icon or via the Utilities Menu as described above. Click on File=> Program Set Up.

General Info



If you do not see the **OK**, **Cancel**, and **Help** buttons, try positioning the box as far into the upper left hand corner of the program window as possible. (You can click on the Window=>Tile menu to accomplish this). If you still cannot see these buttons, check your screen resolution which must be at least 800 x 600.

Use Quick Date Entry - when this is checked you can type in an abbreviated date - mmddyy

would bring in current month/day/year – 051213 would display as May 12, 2013.

Auto Number Client Records - when this is checked, the unique client codes will be assigned automatically. If not, the user must assign a unique client code for each client entered.

Lookup Clients by Code - normally DAT-MAIL will allow client look-up by the first few letters of the client's name when creating Statements. If you prefer to use the client code instead, check this box.

Limit Piece Counts to Master Statement Quantities - if the user is working from a Master Statement, he/she will be prevented from entering a mailing quantity for any rate greater than the balance in the Master Statement. If this option is not checked the user will be warned but will be able to over-mail the rate.

Create Postage for 3606 Receipt - if this box is checked the default setting for the "Create Postage Entry" checkbox in the 3606 program will be checked. This includes the 3606 postage in all reports in addition to the service charges.

Clear Check Request After Report - After running your Check Request report, the statements that have already been included will be dismissed from the next Check Report that you run - helpful if you need to run the report more than once a day.

Do Not Verify User 1 - When DAT-MAIL creates statements, it updates the last client, permit, job description back to the job file, the permit gets updated as the default permit to the client file. This is a great feature for mail owners who don't want their master files altered by creating statements.

Protect Job and Client File - by checking this option in program setup, the program will not update your Job File with the client and permit information in your "new postage statement".

Example: If you create a postage statement for Job ABC and select Client 123 with Permit 456 we are not going to "hard code" this into your Job File for Job ABC - so Job ABC will not be associated with one particular client and permit number. Also client 123 will **NOT** be associated with only Permit 456.

Entry or editing of this data:

Enable Non-identical Mailing Verification - Our program has two weight verification systems.

One (the default) requires identical piece weight and the other works with Non-Identical weights. With the non-identical option turned on, the program adjusts pound postage on pound rate mailings based on actual mail weights. You enter the weight of each pallet in the mailing, then our system subtracts the tares and compares the mail weight for the physical pallets with the weight in the statement. If it is different, the pound postage is adjusted in the STD mailing.

Do Not Preview Any Reports - if this is checked, all reports print directly to the printer. If it is not checked, the user is prompted to preview the report first, after which the report can be sent to the printer.

Statement Defaults

The screenshot shows the 'System Setup' dialog box with the 'Statement Defaults' tab selected. The left sidebar lists various setup categories, with 'Statement Defaults' highlighted. The main area contains several configuration sections:

- Rates Lookup Statement Date:** A date selection field.
- Default Mailing Agent:** A dropdown menu.
- Mail Under Optional Procedure:** A checkbox, with a sub-section for 'Include Meter and Stamps In OP Report'.
- Lot Required:** A checkbox.
- Add Sequence Number To CAPS ID:** A checkbox.
- Do Not Populate Default Mailer and Permit:** A checkbox.
- Default Move/Update Method:** A section with checkboxes for 'Ancillary Service Endorsement', 'FASTforward', 'NCOA Link', 'n/a Alternative Address Format', 'ACS', 'Alt. Method', 'OneCode', and 'Multiple'.
- Limit Piece Counts to Job File:** A checkbox.
- Do not auto-populate Form Type on Misc. Statements:** A checkbox.
- Default Statement Form:** Radio buttons for 'None', '3600-FCM', '3602-R', and '3602-N'.
- Default Statement Listing Order:** Radio buttons for 'Control No', 'Client No', 'Receipt No', 'Permit No', and 'Job No'.
- Default 1st Class Weight Type:** Radio buttons for 'Pounds' and 'Ounces'.
- Default Std(A) Weight Type:** Radio buttons for 'Pounds' and 'Ounces'.
- Default Rate Tree on Statement Add:** Radio buttons for 'Normal', 'Expand All', and 'Contract All'.
- Sequence Auto Numbering:** Radio buttons for 'None', 'Control No', 'Job No', and 'Permit No'.
- Receipt Auto Numbering:** Radio buttons for 'None', 'Control No', 'Year/Month', 'Permit No', and 'Job No'.

Buttons for 'OK', 'Cancel', and 'Help' are located at the bottom right.

Rates Lookup Statement Date - if the mailing date is left blank, this date is used to pick the correct rate table. It should be changed whenever a new rate table takes effect.

Default Mailing Agent - enter the mailer code that will be the default applied on your statements.

Mail Under Optional Procedure - If your company participates in the USPS Optional Procedure Program, check this checkbox. You will be able to indicate whether each Statement is mailed under Optional Procedure and all "OP" Statements will appear on the OPTIONAL PROCEDURE REPORTS available in the Daily Reports menu. Currently, this is an ALL or NOTHING setting box.

If you have certain statements that you do NOT want mailed under Optional Procedure you will have the option at the time you create your statements to uncheck' the box.

TIP !

When 'Mail Under Optional Procedure' is activated, the program automatically sets the Sequencing Auto Numbering scheme to **Permit No.** and Receipt Auto-Numbering to **Control No.**

Include Meter and Stamps in the Op Report - If you would like your Meter and Stamp mailing statements to also be included in the Optional Procedure reporting, check this box.

Lot Required - If you want to force the Lot to be added when statements are entered.

Add Sequence Number to CAPS ID - Will help aid in tracking CAPS accounts.

Do Not Populate Default Mailer and Permit - Allowing for blank, last minute hand entry.

Default Move Update Method - Choose from available options. This value will be used if there is not a Default Move Update Method identified in the Client record being used for the postage statement.

Limit Piece Counts to Job File - If you enter a number of pieces in a Job record that should be mailed and you check this box, you will not be able to create a statement for over that amount.

Do not auto-populate Form Type on Misc. Statements - By checking this box, you will prevent the system from assigning the Form Type value from an existing Job record into a Miscellaneous Statement.

Default Statement Form - This default allows you to select the statement that you use most often as a default.

Default Statement Listing Order - This default lets you choose the default sequence in which you will see your Statements. Press the radio button for the desired choice: Control Number, Permit Number, Client, Job or Receipt.

Default First Class Weight Type (Pounds or Ounces) - default unit of measure of piece weight when creating First Class Statements

Default Std(A) Weight Type (Pounds or Ounces) - default unit of measure of piece weight when creating Standard (A) Statements

Default Rate Tree on Statement Add (Normal, Expand All, Contract All)

Normal - shows all available parts and entry discounts with no rates. You would expand only the tree sections that contain the rates at which you are mailing. This way all the rates you are mailing may be visible on the screen without any scrolling.

Expand All - Shows all parts, entry discounts and rates. You would scroll down to each rate you are mailing and enter your piece counts. For Standard mail, you would most likely have to scroll down the screen to get to all of your rates.

Contract All - Shows only the available parts for each Statement. You would expand both the parts and the entry discounts to get to the rates. This will display the smallest amount of information needed to enter the piece counts.

Sequence Auto-Numbering - Choose the method you wish to use to automatically assign the Mailing Sequence Number of each Statement. You may elect not to auto-number your Mailing Sequence number but DAT-MAIL Statements can auto-number this number three different ways.

1. It can assign the Mailing Statement's Control Number
 2. It can use the "Permit Control" number
- or
3. It can use the job number.

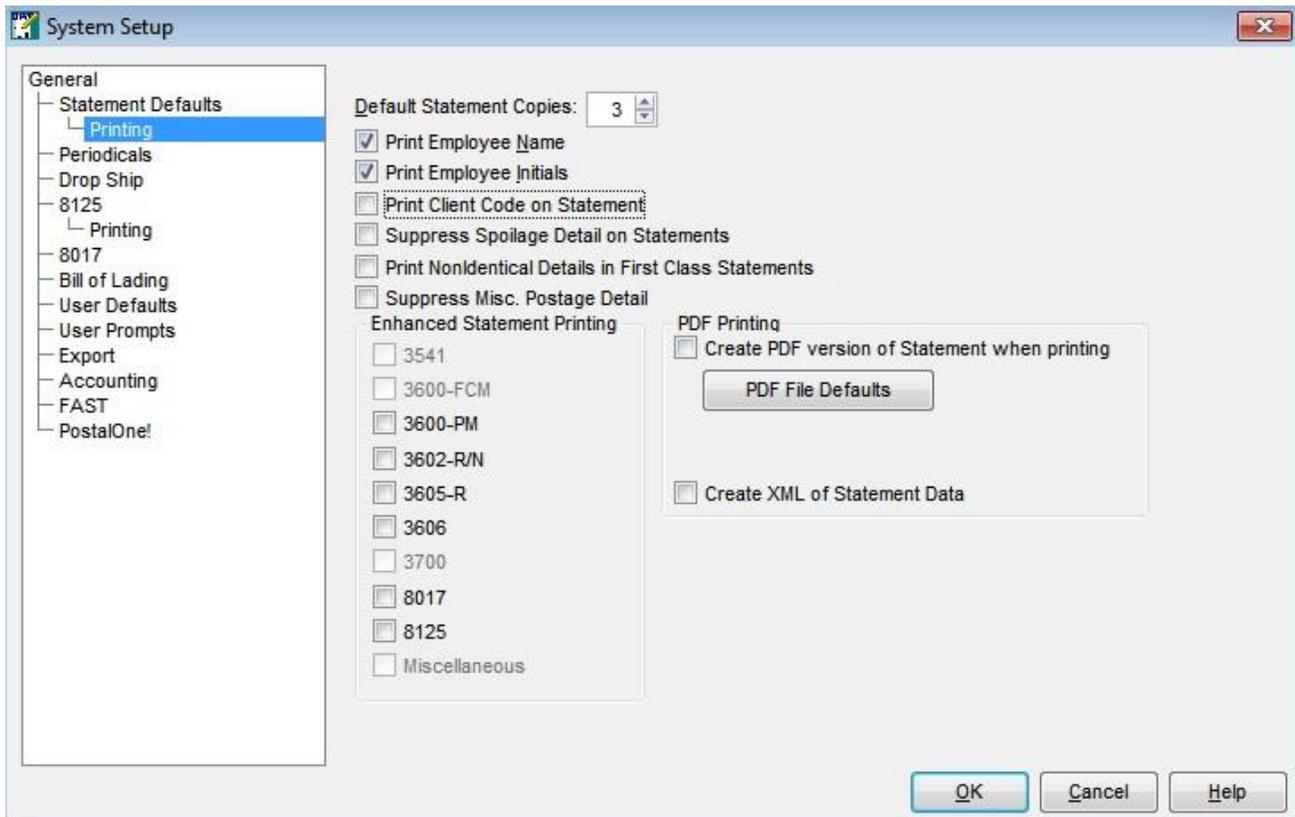
Each time a mailing is made with a permit, the permit control number is incremented. For example, if you are doing three Mailing Statements on permit number 100, the permit sequence numbers could be 100-341, 100-342 and 100-343. If you are Mailing under Optional Procedure, two separate Permit Sequence numbers are supported, one for mailings made under Optional Procedure and one for mailings not done under Optional Procedure.

This is why the Permit Control number is the preferred Sequence Numbering method if the mailer is mailing under Optional Procedure. The Job Control number takes up to eight characters of the job number and adds a dash followed by a number. If you do five Statements for job 1542, the Job Control numbers will be 1542-1, 1542-2, 1543-3, 1542-4 and 1542-5.

Receipt Auto-Numbering - You can assign no number the Receipt Number field or assign the control number, permit sequence number or a Year/Week code. The Year/Week code prints the year followed by your fiscal week number based on the fiscal year begin date that you can enter if this numbering method is used. The Job Control number can also be used as described above.

TIP ! **We highly recommend that either the Receipt Number or Mailing Sequence Number be assigned to the Control Number!** This makes it easier to locate your Mailing Statements in the program.

Print Settings



Default Statement Copies - The number of Statement Copies you normally print

Print Employee Name - If an employee code is entered, the employee's name is printed in the Statement in the signature block.

Print Employee Initials - If checked, the employee initials print on the bottom of the Statement.

Print Client Code On Statement - If checked, the code used for each Client will print on the statement. The printed code will appear in the Client Information box at the upper right-hand corner of the statement in a small font.

Printing Adjustments - Use these settings to customize your printing of statements as needed.

Enhanced Statement Printing - We are transitioning our printed statements to use a .NET technology for enhanced printing methods. Soon, these boxes will be removed and will become the default.

Create PDF version of Statement when Printing - During statement printing, a copy of the statement will be printed to a .PDF and stored in user-defined directories.

8125 Settings

The screenshot shows the 'System Setup' dialog box with the '8125' settings selected in the left-hand tree view. The main area contains several configuration options:

- Always Create 8125:**
- Fill In 8125 Section 2:**
- Contains Mailing Pieces for Outside Delivery Area:**
- Always Create Bill of Lading:**
- Default Format:** Radio buttons for '1 - 8125' (selected) and '2 - 8125-C'.
- Default Origin:** Radio buttons for 'Mailing Plant' (selected) and 'Post Office'.
- Mailing Agent Code:** Text field with a dropdown arrow.
- Appointment Number:** Text field.
- Default values used when not defined in Mailing Agent record:**
 - USPS Employee:** Text field
 - USPS Phone:** Text field
 - USPS Employee 2:** Text field
 - USPS Phone 2:** Text field
- Mailer Contact:** Text field
- Mailer Contact Phone:** Text field
- Use Employee from Statement:**
- Default Carrier:** Text field with a dropdown arrow.
- Carrier Makes Drop Ship Appointments:**
- Default Comments:** A multi-line text area with a note below it: '*disabled from 8125 printing options'.

Buttons for 'OK', 'Cancel', and 'Help' are located at the bottom right.

Always Create 8125 - Toggle checkmark on and off as desired. This controls whether or not you want our system to automatically create a corresponding 8125 when you have manually entered a drop ship postage statement.

Fill in 8125 Section 2 - Section 2 is supposed to be filled in by the USPS but many Bulk Mail Acceptance personnel prefer the mailer to fill in this section. Check this box if you want the statement information pulled into this section.

Contains Mailing Pieces for Outside Delivery Area - Checks the appropriate box in Box 14, "Mailer Information".

Default Format - DAT-MAIL supports two different 8125 formats - (1) Regular 8125's and (2) consolidated 8125's. Consolidated 8125's prints out all the mailings in a list format.

Default Origin - Indicate what the usual origin of your mail is - Mailing Plant or Post Office.

Mailing Agent Code - Enter the default Mailer ID that you want to print on your 8125's. This value will be used unless the statement has a different Mailing Agent assigned to it

Appointment Number - Leave this blank unless you have a standing appointment number with your Detached Mail Unit or Post Office.

Default values used when not defined in Mailing Agent Record USPS Employee Information - To print as a default in Origin Post Office Section 2 **PRINTS BOX 26a (Std A)**

USPS Phone - **PRINTS BOX 26b (Std A)**

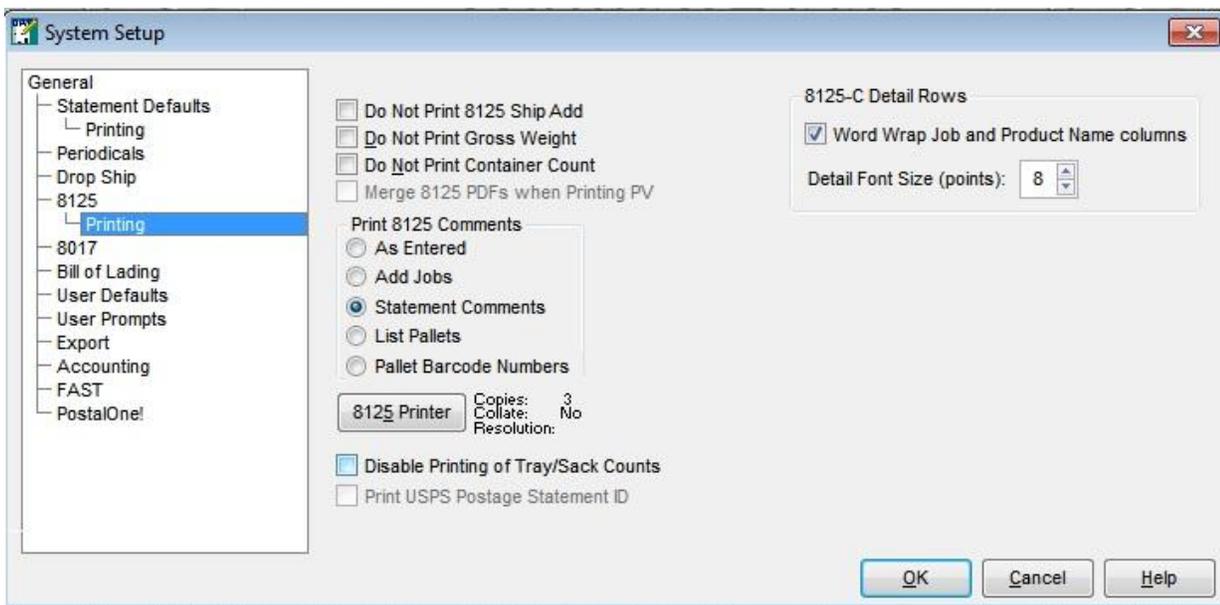
Mailer Contact Information - PRINTS IN BOX 5 and 6 (Std A)

Use Employee from Statement - When this box is checked, the default Mailer Contact information will not be used. We will use the Employee value that is entered on the postage statement.

Default Carrier Information - PRINTS IN BOX 16a and 16b (Std A) if Carrier Makes Drop Ship Appointments box is checked.

Default Comments - PRINTS in Comments Section of 8125 - if you cannot access default comments here, go to the 8125 Printing set up and select Print 8125 Comments as entered.

8125 Print Settings



Do Not Print 8125 Ship Add - Check this box if you do not want the address of the BMC/SCF/DDU facility to print on the 8125.

Do Not Print Gross Weight - Check this off if you do NOT want DAT-MAIL to print a gross weight figure on the 8125 form.

Do Not Print Container Count - Check this off if you do NOT want DAT-MAIL to print container counts on the 8125.

Print 8125 Comments - The 8125 contains several comment lines which can be automatically filled out. The way this is done is controlled by your selection.

As Entered - All comment information must be added by editing the 8125. If you want a constant comment to print on every 8125 that you generate, you can select this option and then enter the Default Comments on the right side of this screen.

Add Jobs - When this option is checked, the Job numbers from the statements that are associated with your 8125 will be listed in the comments section.

Statement Comments - we will use the comments you entered from the Statement that generated the 8125.

List Pallet Numbers - This option will print individual or a range of pallet numbers pulled from the Container information on the Mail.dat file used.

Pallet Barcode Numbers - This option will print the Unique Pallet Barcode number assigned from the Mail.dat file.

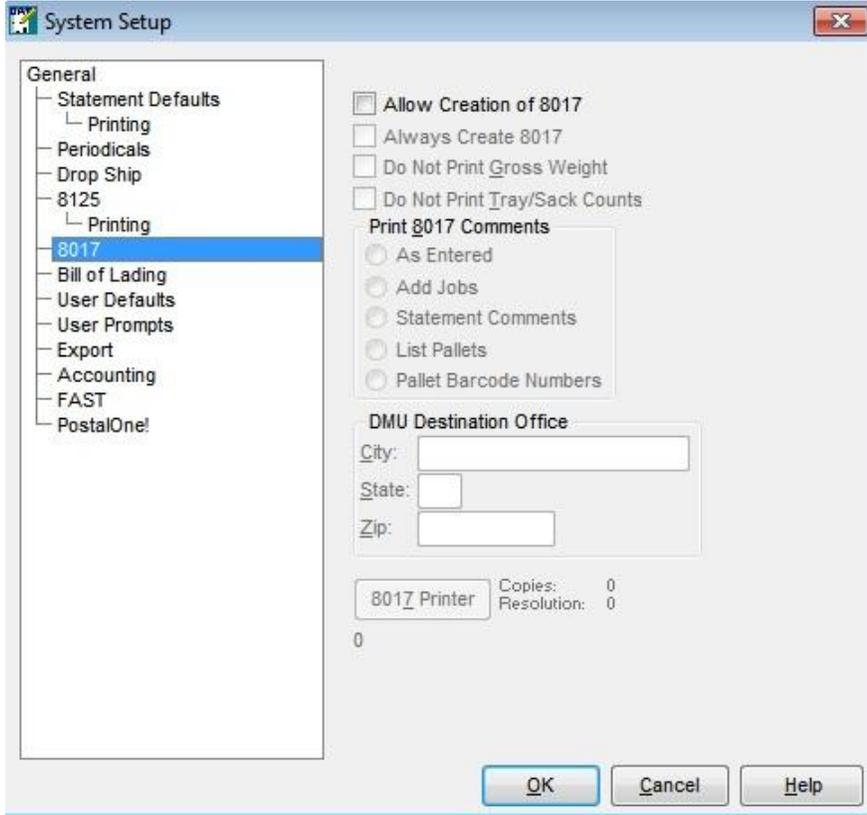
8125 Printer Button - Access to set a unique default printer for 8125s.

8125 Copies - default number of copies printed

Disable Printing of Tray/Sack Counts - When checked, we will not display the number of trays/sacks that are included on a Pallet.

Print USPS Postage Statement ID - If you are using our Window Book Automation Scheduler to run the USPS MDR Client in batch mode for uploading your eDocs to PostalOne!, we can retrieve the USPS Postage Statement ID through the XML Receipts that are returned to us and have it print on your related postage statement.

8017 Settings



Allow Creation of 8017 - Toggle checkmark on and off as desired. This controls whether or not you want our system to automatically create a corresponding 8125 when you have manually entered a drop ship postage statement.

Always Create 8017 - Toggle checkmark on and off as desired. This controls whether or not you want our system to automatically create a corresponding 8017 form when you have manually entered an Origin destination entry postage statement.

Do Not Print Gross Weight - Check this box if you do NOT want DAT-MAIL to print a gross weight figure on the 8017 form.

Do Not Print Tray/Sack Counts - Check this box if you do not want us to print the number of trays/sacks that are included on a Pallet.

Print 8017 Comments - The 8125 contains several comment lines which can be automatically filled out. The way this is done is controlled by your selection.

As Entered - All comment information must be added by editing the 8017. If you want a constant comment to print on every 8017 that you generate, you can select this option and then enter the Default Comments on the right side of this screen.

Add Jobs - When this option is checked, the Job numbers from the statements that are associated with your 8017 will be listed in the comments section.

Statement Comments - we will use the comments you entered from the Statement that generated the 8017.

List Pallet Numbers - This option will print individual or a range of pallet numbers pulled from the Container information on the Mail.dat file used.

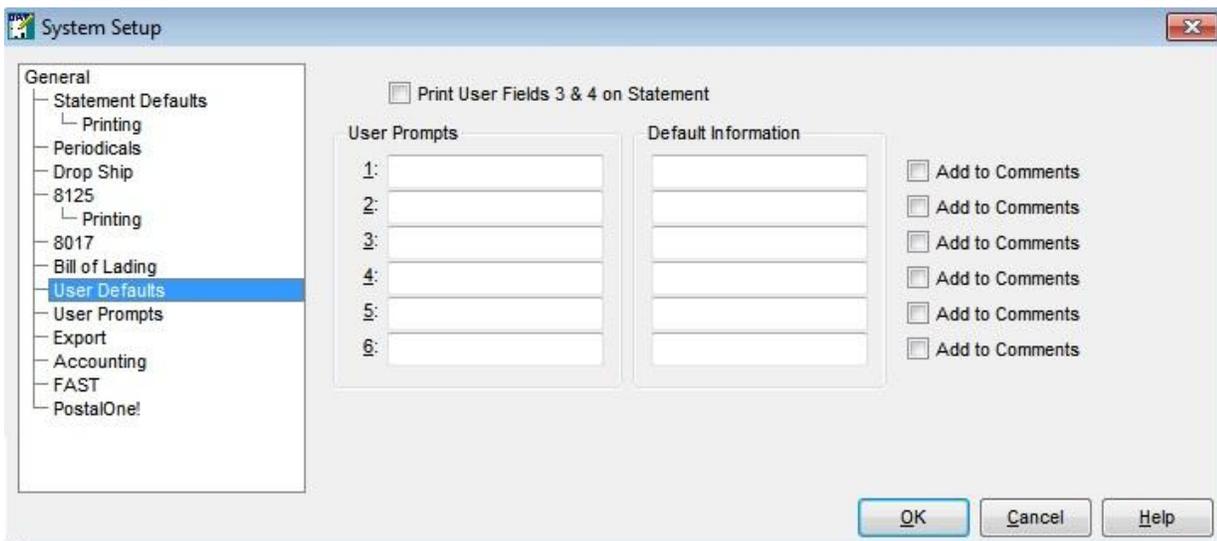
Pallet Barcode Numbers - This option will print the Unique Pallet Barcode number assigned from the Mail.dat file.

DMU Destination Office - Enter your local DMU Post Office information so it will print on the 8017 form.

8017 Printer Button - Access to set a unique default printer for 8125s.

8017 Copies - default number of copies printed

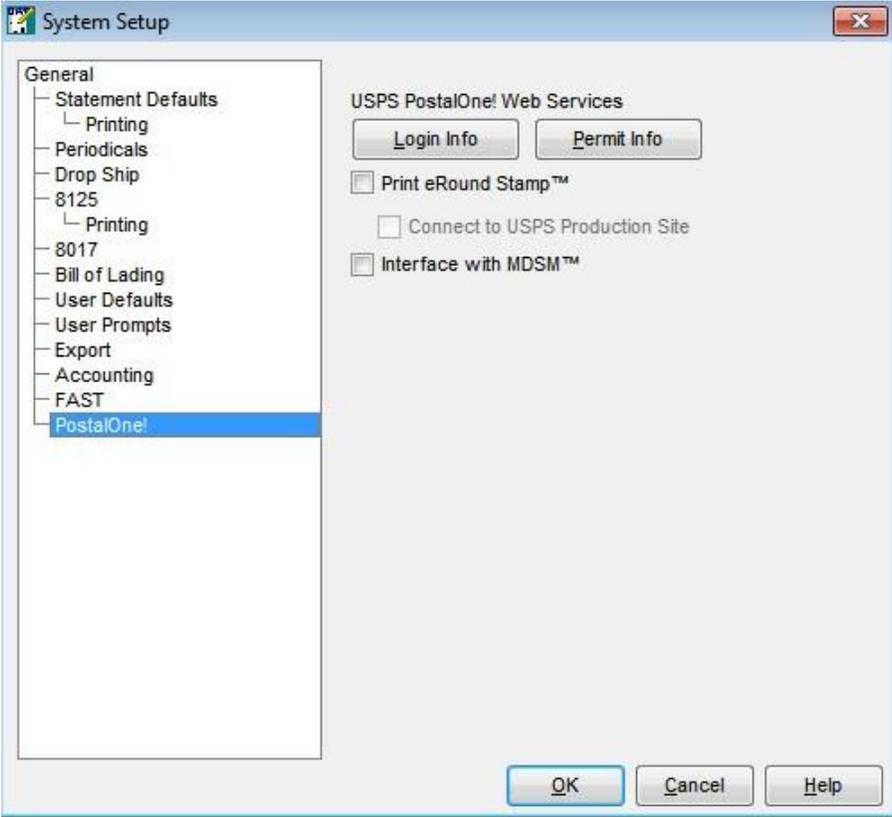
User Defaults



DAT-MAIL Statements has six user-defined fields which you can name yourself. Data entered in these fields can be included in reports created with a third party Report Writer or the optional report writer that is available for DAT-MAIL Staements.

In the "User Default" screen, you can name the fields and create a "Hot Key" by placing an ampersand (&) in front of the letter you wish to make "hot". Please avoid using the letters O, H and C since they are already assigned to the **OK**, **Help** and **Cancel** buttons. You do not have to either assign hot keys or use the first letter of a title.

PostalOne!



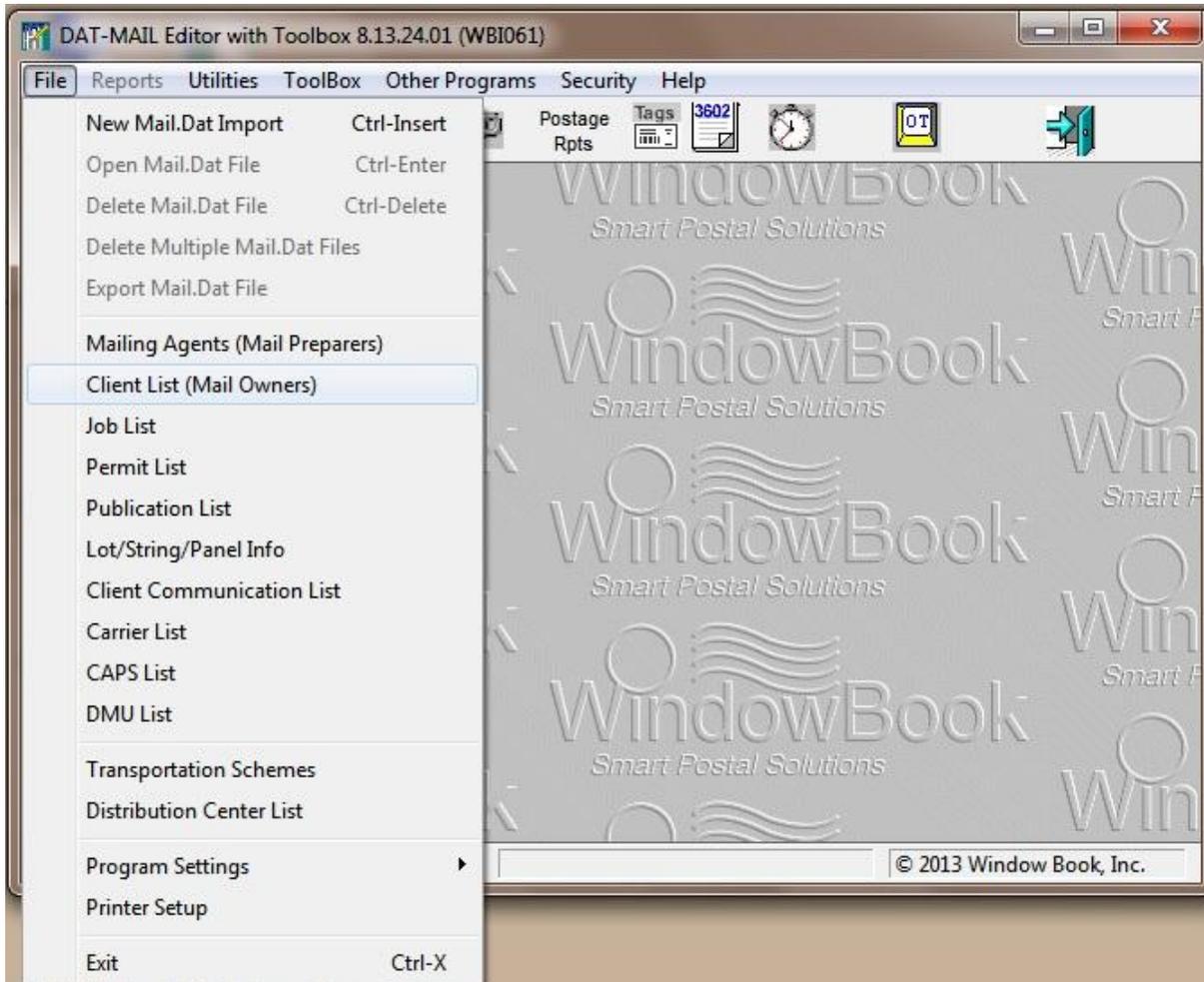
Note: The PostalOne! option requires a DAT-MAIL Registration that includes PostalOne!. This gives you access to your PostalOne! Login and Permit Info.

Entering Clients and Permits

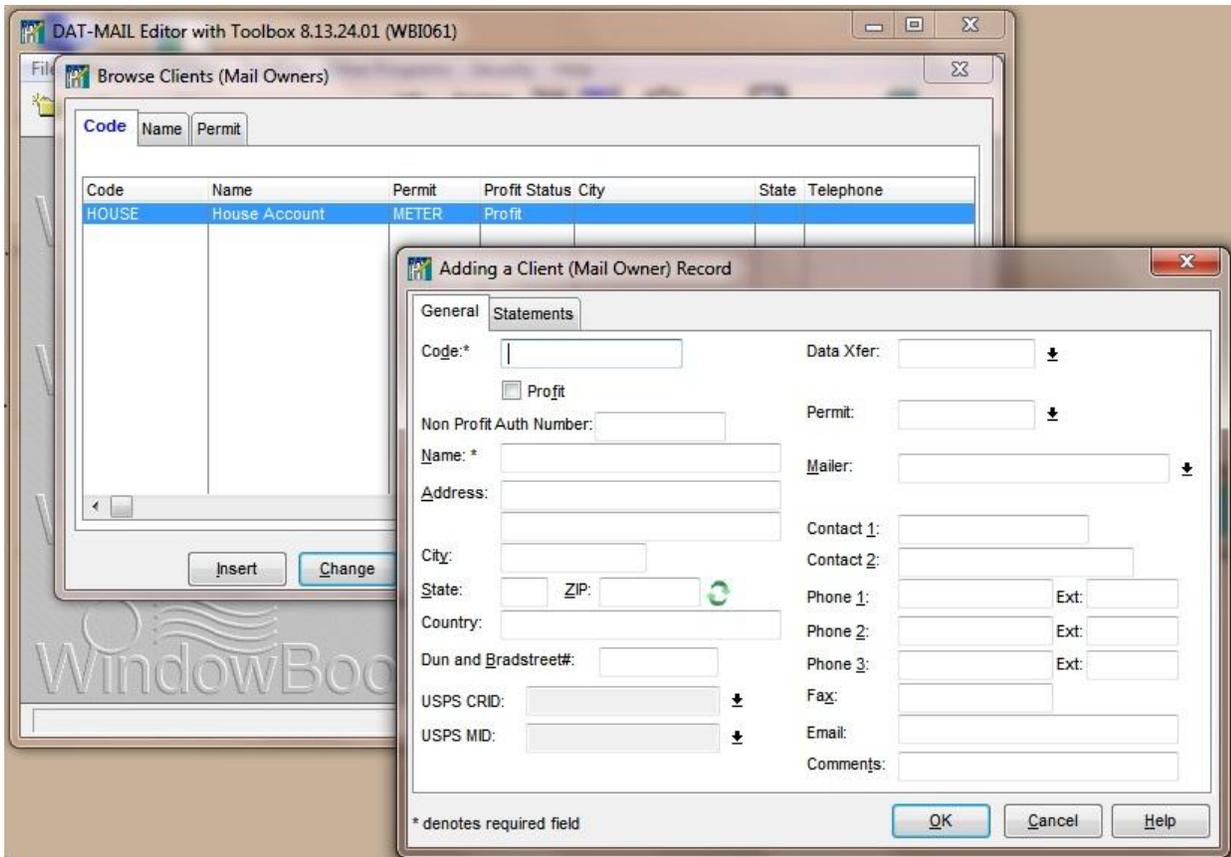
Clients and Permits can be added to DAT-MAIL manually. If you need to associate a particular client with a particular permit this can also be accomplished in the system - the process is as follows:

Adding a Client

1. Open the "Client" list from the File menu in DAT-MAIL and type in the information for the new Client:



From this screen click the **Insert** Button and begin entering the Company and Contact information by filling out all the relevant fields. (Required fields are marked with an asterisk):



If you have an existing permit (see below "Adding a Permit") that you want to be associated with the client, you can add that information by clicking the "Permit" drop-down menu and choosing the appropriate permit number.

Changing a Client (Mail Owner) Record

General Statements Local Permits

Code:* XYZ Data Xfer: [] ↓

Profit Permit: [] ↓

Non Profit Auth Number: [] Mailer: [] ↓

Name:* XYZ Corporation Contact 1: Joe Smith

Address: 300 Main St Contact 2: Barbara Kelly

City: Boston Phone 1: (617) 446-3281 Ext: 99

State: MA ZIP: 02114 Phone 2: [] Ext: []

Country: [] Phone 3: [] Ext: []

Dun and Bradstreet#: [] Fax: []

USPS CRID: [] ↓ Email: []

USPS MID: [] ↓ Comments: []

* denotes required field

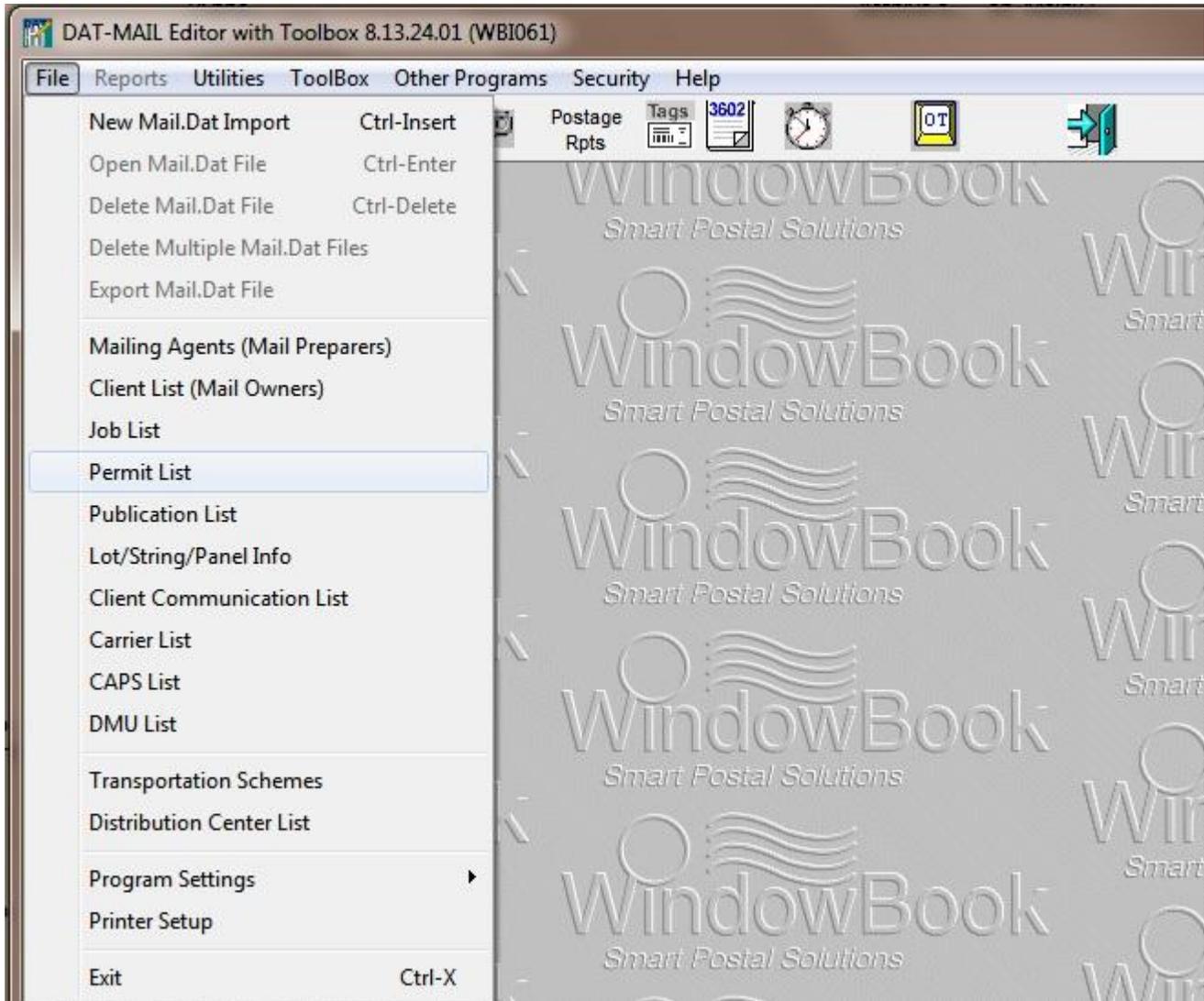
OK Cancel Help

Once you have finished entering the client information press **OK** to save it, then repeat the process for the next client.

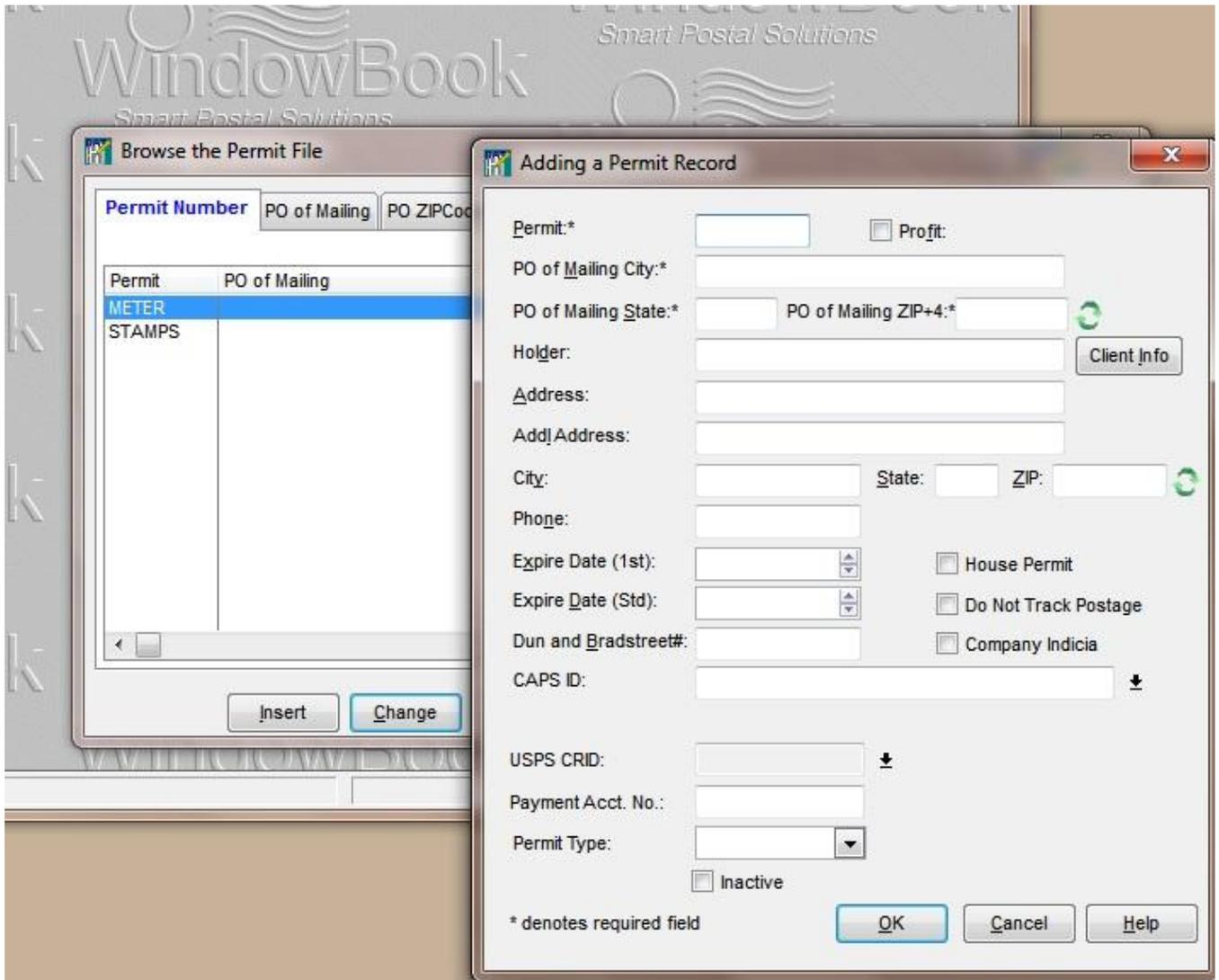
Note: In order for the record to be saved, all required fields must be filled out.

Adding a Permit

1. Open the "Permit" file from the File menu in DAT-MAIL and type in the information for the new Permit:



On this screen click the **Insert** button to add a Permit record:



At this point you can enter your permit information including the Permit number, City, State, Zip Code (required) and other pertinent information. If the permit is a House Permit (used for all mailings) check the "House Permit" box, then add any other information you want to record about the permit such as phone number, expiration date, etc. as appropriate.

Changing a Permit Record

Permit:* 12345 Profit:

PO of Mailing City:* Cambridge

PO of Mailing State:* MA PO of Mailing ZIP+4:* 02139 

Holder:

Address:

Address:

City: State: ZIP: 

Phone:

Expire Date (1st): House Permit

Expire Date (Std): Do Not Track Postage

Dun and Bradstreet#: Company Indicia

CAPS ID: 

USPS CRID: 

Payment Acct. No.:

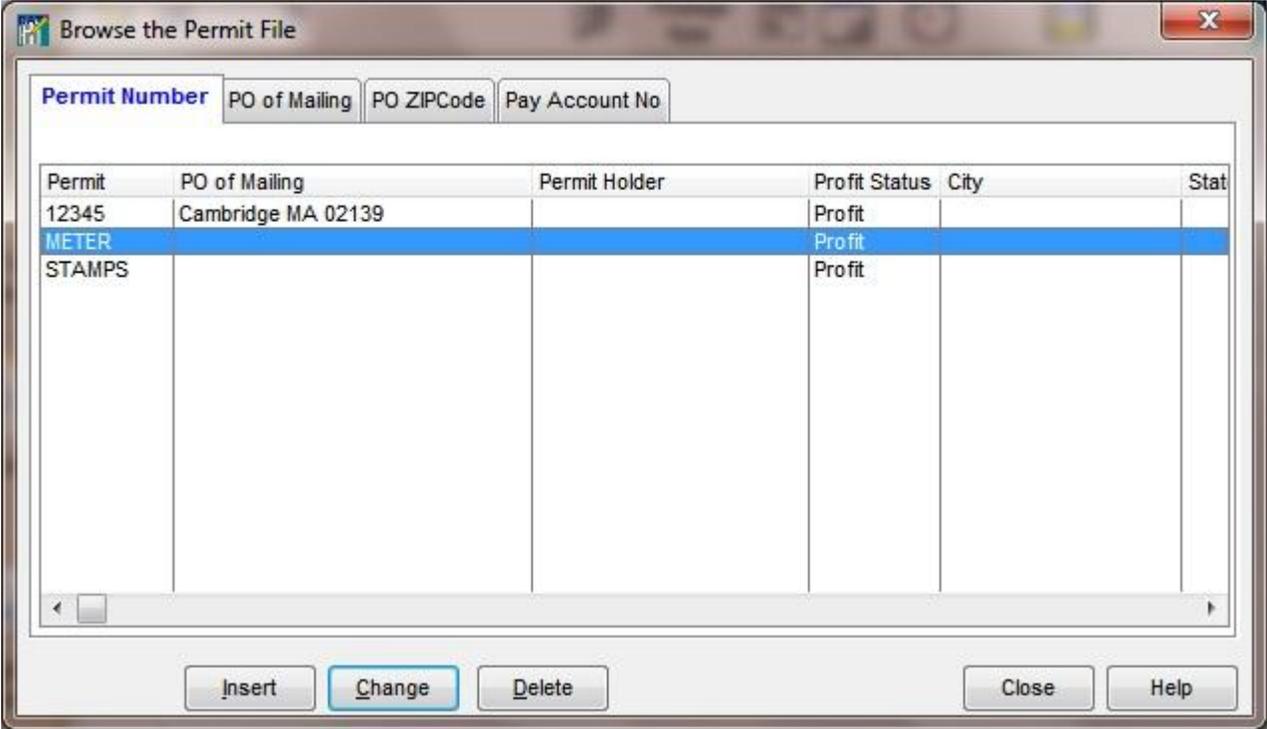
Permit Type: 

Inactive

* denotes required field

If the permit is associated with a particular Client, click the **Client info** button, which allows you to choose an existing client record from the Client Listing. The Permit will then become associated with that client as their default permit.

Once the Permit information has been entered press **OK** to save the information, then repeat the process for the next permit. The new Permit will appear as follows in the Permit Browse menu:



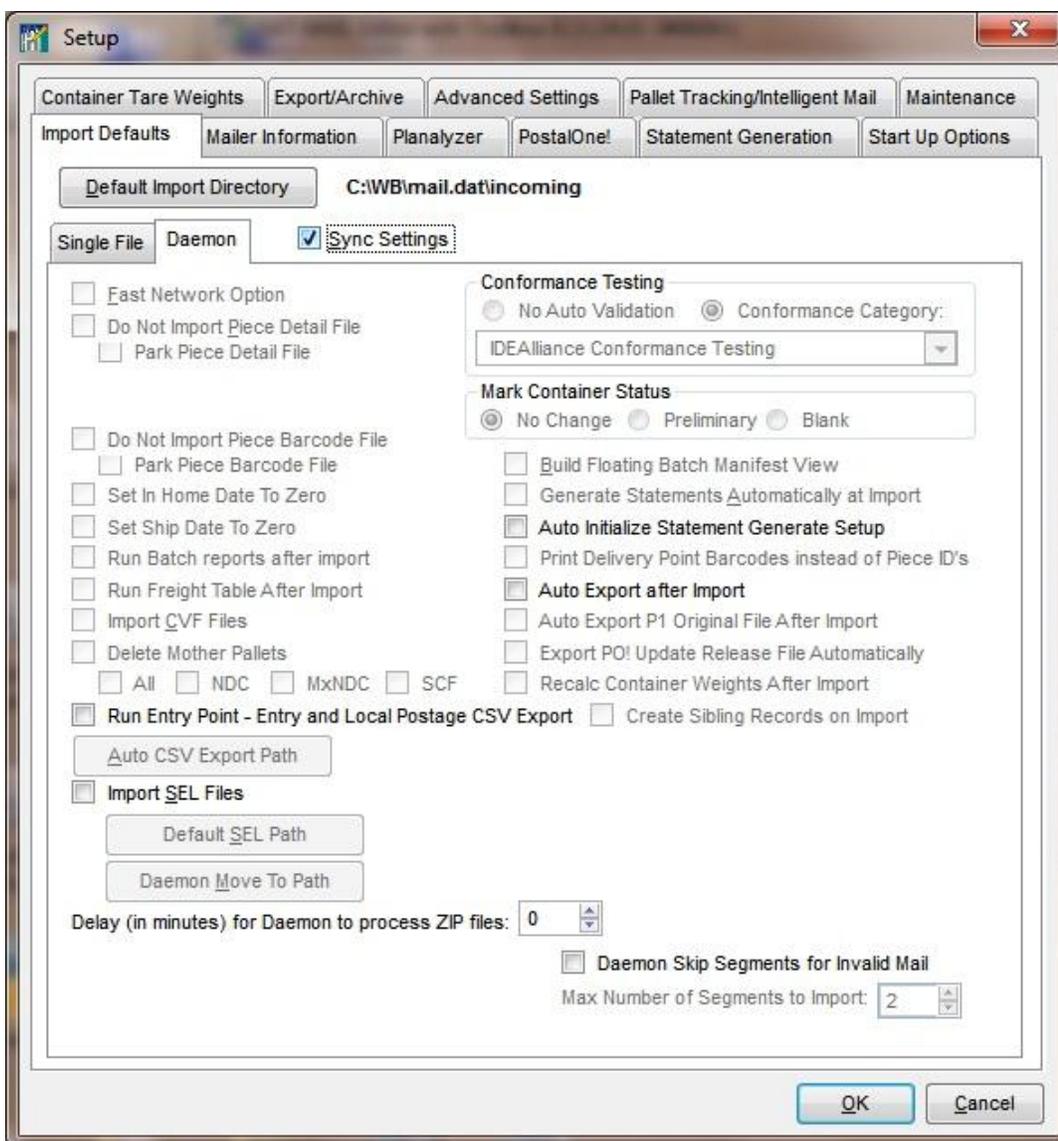
Setting up the Import Daemon

General Setup

Import Daemon

The Daemon is a means of automatically importing your Mail.dat files from a hot folder of your choice. You can choose different program setup options for the Daemon import behavior or you can choose to Sync Settings with the manual/single file import options.

To access the Daemon setup menus start from the DAT-MAIL "File" Menu and choose the Program Settings => Program Setup menu, then click the "Daemon" Tab under "Import Defaults":



There are a few separate settings that are specifically for the Daemon:

Run Entry Point - Entry and Local Postage CSV Export - Select a directory where this CSV Export Report will automatically be exported to.

Import SEL Files - This option is for automatically importing spoilage files from intelligent inserters.

Delay for Daemon - Set a time delay default for automatic import with the Daemon.

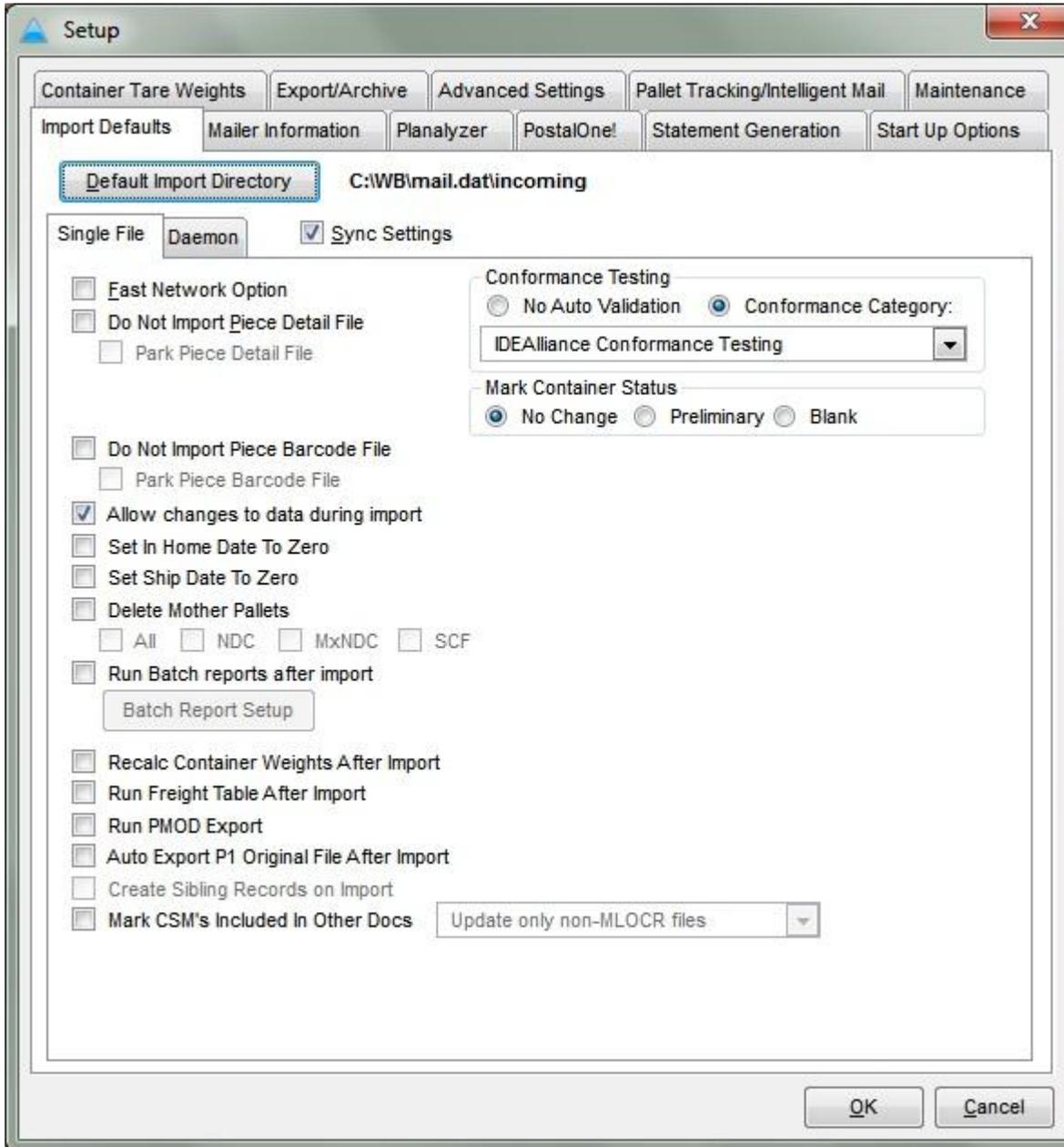
TIP ! By default, this option should be set to zero, but for those customers who get the "please insert next disk" error when transferring zip files to the Daemon's inbox directory, the delay should be increased to 5 or 10 minutes.

Daemon Skip Segments for Invalid Mail - Use the checkbox to enable this feature in order to set the number of segments to import. All other segments will be ignored. This can be a helpful feature if your files always have the same number segments. For example, if you always mail two out of three segments, you would set this to "2" and the third segment would be ignored. The third segment could always be produced by your presort program for undeliverable or foreign mail pieces.

Import Files - settings

Import Defaults Tab - Program Setup

This is the program setup for Importing Mail.dat files, found under **File => Program Settings => Program Setup** from the DAT-MAIL main menu. Click on the "Import Defaults" tab.



What these options are for:

Default Import Directory - Press the **Default Import Directory** button and then select the path where you will be keeping your Mail.dat files. After selecting the path, it is displayed

next to the button. Note that Mail.dat files can be imported from any directory, this is simply an option to go directly to the most commonly used path.

Fast Network Option - If you are using DAT-MAIL on a network and your default import directory (where new Mail.dat files are placed) is also on a network, you should check this option. When it is checked, the Mail.dat files you have chosen to import are AUTOMATICALLY copied to the temp directory of your local hard drive, then our indexed work file is created during the import process. When the import is done, the work file is copied back to the network and listed in DAT-MAIL's Mail.dat file list so anyone on the network can access it. By performing the disk-intensive import process on your local drive the import will be faster and will not slow down your network. No temp files will be stored on your local computer.

Do Not Import Piece Detail File - You can choose to not import the PDR file. This will save you time during the import process and will not diminish the value of the data if you are not manifesting or tracking spoilage/shortage for 100% mailings.

Park Piece Detail File - In addition to 'Do Not Import Piece Detail File' there is an option to 'Park' that file. When the file is Parked, it is retrieved when you perform a PostalOne! release upload.

Do Not Import Piece Barcode File - You can choose to not import the PBC for much the same reason as stated with PDR. This file can be large and by not importing it, you can reduce the time it takes for the import.

Park Piece Barcode File - In addition to 'Do Not Import Piece Barcode File' there is an option to 'Park' that file. When the file is Parked, it is retrieved when you perform a PostalOne! release upload.

Allow Changes to Data During Import - Checking this box allows DAT-MAIL to make corrections to Mail.dat files as they are imported, which means you can correct some common errors and make the Mail.dat file usable for production. If you are using DAT-MAIL specifically to test and troubleshoot Mail.dat files, un-checking this box will give you a complete report of all errors found without making any automatic repairs. Unless you are specifically troubleshooting files, we recommend that this option remains turned on.

Set In-Home Date to Zero - Your single file imports will automatically be stripped of the In-Home date that was preset in the Container Summary file (CSM) so that you may set this date at a later time. We suggest using our Mail Schedule View to set your mailing, shipping and in-home dates.

Set Ship Date to Zero - Your single file imports will automatically be stripped of the Mail Date that was preset in the Container Summary file (CSM) so that you may set this date at a later time. We suggest using our Mail Schedule View to set your mailing, shipping and in-home dates.

Delete Mother Pallets - This option will strip Mother Pallets that were created from the presort so you may perform your own Palletization in DAT-MAIL. Once you select this option, you can choose to delete which Mother Pallet levels you would like removed.

Run Batch Reports After Import - Another great automation feature giving you access to batch reporting right after Mail.dat import. Review the Batch Report information in the section called DAT-MAIL Reports under Reporting and Accounting. Set up your Batch Report profile then activate this feature.

Recalc Container Weights After Import - This is a handy option if you find that you are getting inaccurate tare weights from your presort which are skewing report information. There is an option at our Container Summary File View to run this process should you choose not to make this a default import option.

Run Freight Table After Import - Our Toolbox clients have the option to automatically run a freight plan using a predetermined freight table upon import.

Run PMOD Export - This option will automatically export container information from your imported Mail.dat file that will be mailed via Open and Distribute.

Auto Export P1 Original File After Import - When chosen, we will automatically create a PostalOne! release file immediately after the import is completed that you can submit to PostalOne! as your Original file submission. You will need to specify the export directory at our PostalOne! tab.

Create Sibling Records on Import - If we find container types marked as Logical, we will automatically create physical siblings for each of those Logical containers. You can specify which default sibling container type should be used at our Advanced Settings tab.

Mark CSM's Included in Other Docs - When chosen, we will update your Container records with a value of **I** (copalletization is done at the Originator's site) or **O** (copalletization is done at another site). Choose I or O at the PostalOne! tab.

Conformance Testing: Conformance Testing examines and analyzes your Mail.dat files in great depth to look for errors upon import - without a performance penalty. Also present is a new error log format that is much easier to read and print. Use this valuable data to pinpoint and ultimately correct errors in your Mail.dat files.

We offer conformance testing at five levels:

Level 1: Referential Integrity testing only: no field level validation

Level 2: Field Checking: Required fields, proper data types in populated fields and referential integrity testing

Level 3: IDEAlliance Conformance testing: Adds checks for valid values in populated fields according to the specifications outlined by IDEAlliance.

Level 4: PostalOne!: Adds checks to the fields required by PostalOne! This is not recommended for files you receive. Rather, this option is available for when you have imported a file and modified it to your needs. You can then export the file and re-import it using this validation level, so that you can determine if it will pass PostalOne! scrutiny.

Level 5: Special Circumstances: For future applications.

Mark Container Status - This setting is defaulted to "No Change" but you have the option to change this to "Preliminary" or "Blank". "Preliminary" is useful if you are required by PostalOne! to provide them with files that will create Preliminary postage statements when the file is uploaded. "Blank" is useful if your presort program consistently marks your Containers Statuses as "Ready To Pay" and you would prefer to have it blank.

Automated Statement Generation

If you tend to import jobs that mail intact without much modification, you can create statements automatically during the initial file import. Be sure to check the box "Generate Statements Automatically at Import" then click the **Statement Setup** button when it appears.

Importing New File

Select Mail.Dat File

Mail.Dat File: C:\WB\mail.dat\incoming\maildat8.hdr
Job ID: 00000006
Job Number: POSTCARD Mail.Dat Version: 13-1
Description: POSTCARD_CAMPAIGN
Estimated Mail Date: 7/01/2013 Set Ship Date to Zero
In Home Delivery Date: 7/05/2013
Delivery Window: 3
Class of Mail: Standard
Piece Type: Letter

Conformance Testing
 No Auto Validation Conformance Category:
IDEAlliance Conformance Testing

Do Not Import PDR File Park PDR File
 Do Not Import PBC File Park PBC File

Run Freight Table After Import
 Run Batch Reports
Select Rpt Profile

Generate Statements Automatically at Import
Statement Setup

IMB Numbering - Assign or Log at Import
 Run PMOD Export

Date: 7/01/2013
Time: 2:29PM

OK Cancel Help

File is: 13-1 ASCII-CR/LF

Several pieces of data are required on statements that may not be populated or available in the Mail.dat file you are importing. Information like Client, Permit, the correct Job number and Description may or may not be present.

When doing Automatic statement generation, DAT-MAIL first checks if the Job has been previously set up in the Job File and whether this information is present.

If the necessary Job information is present, DAT-MAIL uses the Client, Permit and Job data to create the statements. If the data is not present it will check statement information that may have been set up prior to import in some cases - including importing a single file at a time, doing a master import of a list of individual files, or running the Import Daemon.

New Statement Information

Statement Information | Options | Statement Comments and more

Job: [] Job Description: []
Client: Bob Smith Cust Ref ID: []
Permit: 1 Boston MA 02114
Bill To Client: Bob Smith Prepared By: []
Mailing Agent: WBI Carrier: []
Lot: [] Generate PD/WS Qualification Report
Mail Date: 7/01/2013 Automation Coding Date: 7/01/2013
In-Home Delivery Date: 7/05/2013 Carrier Route Coding Date: 7/01/2013
Publication No: [] Carrier Route Sequencing Date: 7/01/2013

Generation Type

- New Statement (Reg. or Consolidated)
- New Statement Entry for Each Segment
- New Statement Entry for Each Container Group ID
- New Consolidated Statement for Each Segment
- New Consolidated Statement for Each Container Group ID
- New Statement for Each Mail Piece Unit ID
- New Commingle Statement for Each Mail Piece Unit ID
- New Consolidated Statement for Each Mail Piece Unit ID
- New Consolidated Statement for Each Truck Number

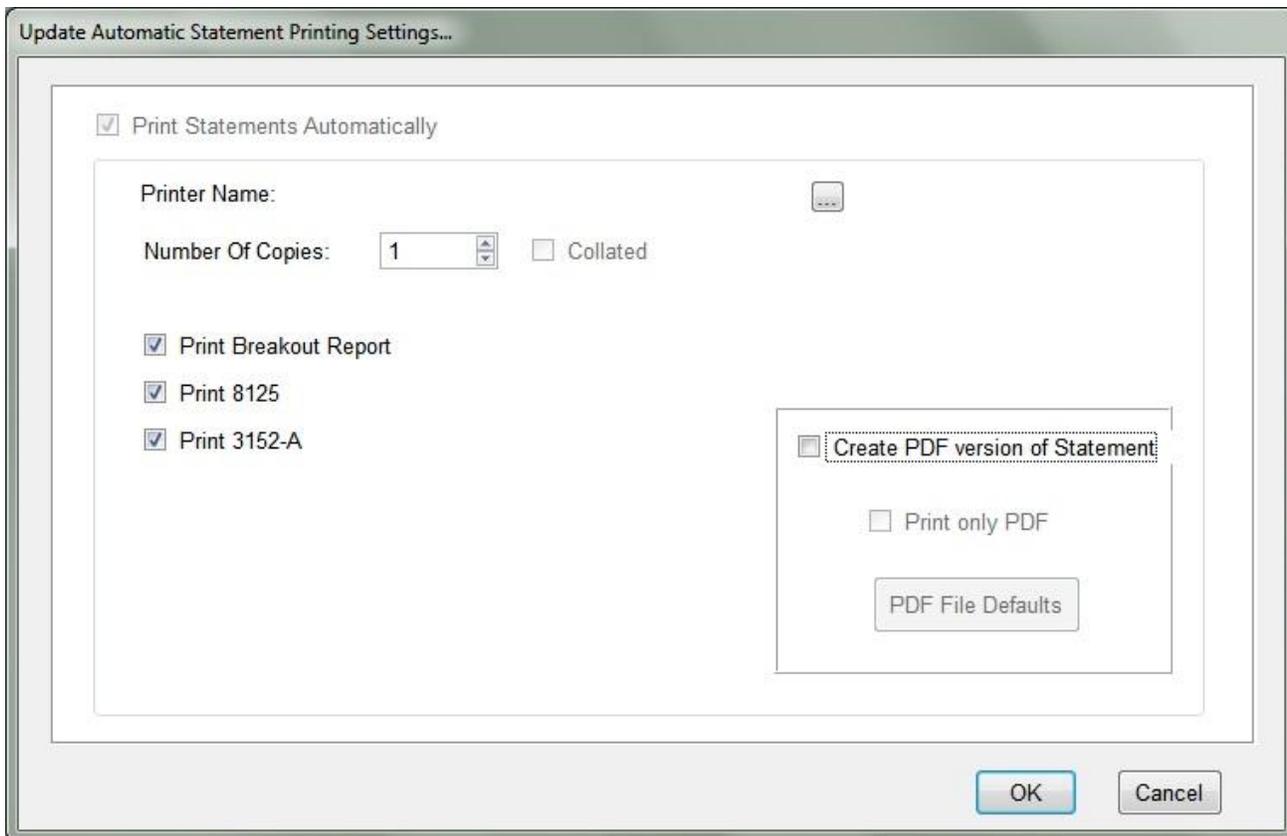
Statement Generation Options

- Add to Existing Statement
- Use Scheduled Date(s) in Mail.Dat File
- Use Permit in Mail.Dat File
- Allow Merging of Like Entry Points

Generate Statements by:

Print Statements Automatically
 Export PD! Update Release Automatically

Print Statements Automatically - check this box to have your statements print directly after they are generated. Leaving this box unchecked simply means that you will print them later from the list in the DAT-MAIL Statements screen. Click on the "3602" icon from any screen in DAT-MAIL to open Statements for DAT-MAIL and access all your postage statements.



Printer Name - set your default printer for automatic printing and set the number of copies.

Print Breakout Report - will print a breakout report along with the statement if the statement contains multiple jobs.

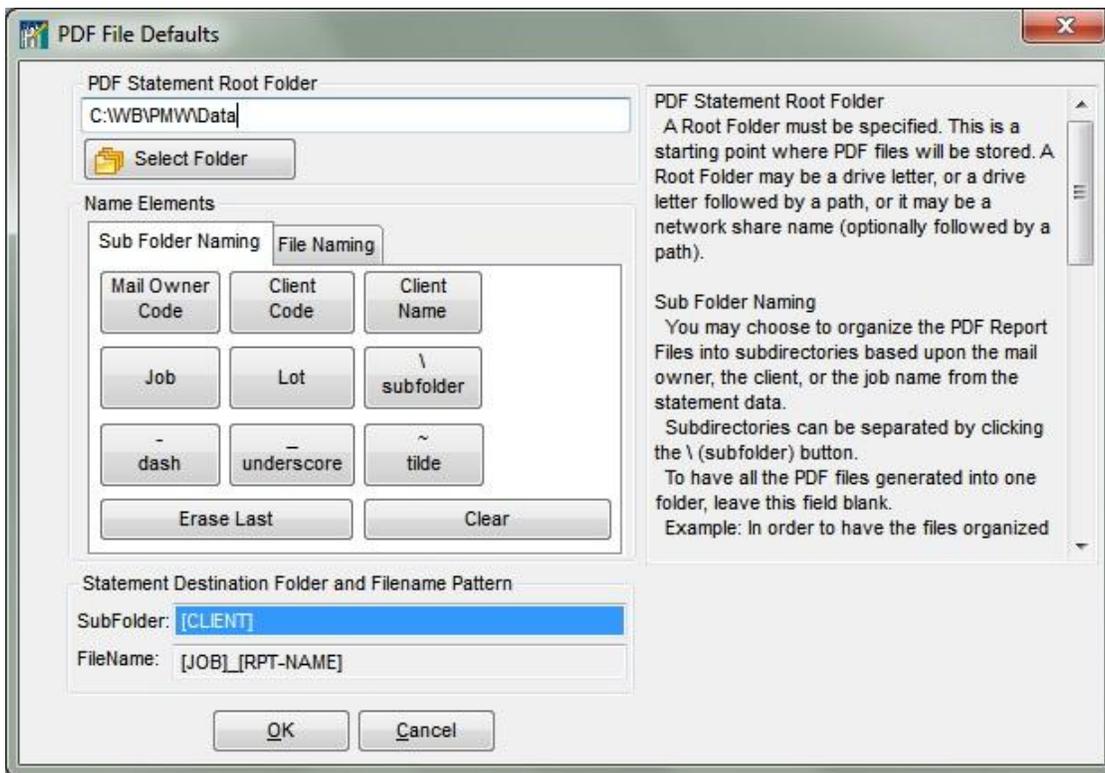
Print 8125 - will print the 8125 form if you are generating drop ship statement(s).

Print 3152-A - will print the barcoded 3152-A form if you have an origin mailing and are participating in the USPS' Confirm ASN or Entry Info program and you have purchased this optional module for DAT-MAIL.

Create PDF version of Statement - check this box to create a PDF in addition to your printed statements and other forms.

Print only PDF - check this box if you only want a PDF of the statement and other forms.

PDF File Defaults - you must set your directories here to tell us where and how to save your PDF files.



PDF Statement Root Folder - press the **Select Folder** button to select a folder for your PDF's. The screen that will be displayed will allow you to not only select a folder but also create a new one.

Subfolder Naming - You must choose one data element for a subfolder name that will appear under the root folder. If you are not assigning mail owners to your client records, you can select "Mail Owner Code" if you want all files in the same folder. In that case, all files will appear in a subfolder under the PDF Root Folder called BlankOwner. If you wish to put the PDF's into folders that will accommodate your purpose, you can do so. You can create folders or a folder hierarchy using elements that include Mail Owner, Client Code and Job Numbers.

As you define your subfolder, you can see your definition displayed on the Subfolder line below the buttons used to make your selection. Use the **Clear** button to wipe out your selections and start over or the **Erase Last** button to remove your last entry.

Subfolder name elements:

You can choose up to three naming elements for your subfolders or create a subfolder hierarchy with these three elements: Mail Owner, Client and Job Number. If you want to include two or more of these elements in a single folder name, you should (but do not have to) separate these elements with a dash (-), underscore (_) or tilde (~).

To create a subfolder hierarchy, press the \ subfolder button in between data elements. MailOwner Code creates a subfolder for each mail owner. A mail owner code can be associated with one or more clients. Press the **Mail Owner** button to set. You will see [OWNER] appear in the SubFolder line below the buttons.

Client Code - a subfolder is created for each client if you press the **Client Code** button. If you also pressed the **MailOwner** button, a subfolder will be created for each MailOwner and below each MailOwner folder, a subfolder will be created for each client. You will see [CLIENT] appear on the Subfolder line.

Job - the job number associated with the statement.

File Naming Options:

You can also use the Mail Owner, Client Code, Job Number or Lot as data elements in the PDF file name. We do not recommend using the same data element in both the sub-folder name and the file name though you can do so if you wish. At a minimum, you must select 'Report Name' as part of the file name. The report name consists of the following data elements:

- Statement Form or supporting document name printed: (such as 3602-R including dash, ConfirmASN for the form 3152-A, Breakout for a multi version breakout report, etc.)
- Dash
- Statement Control No (8 digits, zero padded) either the consolidated statement control number or the statement control number. If the form is an 8125, the 8125 control number is used.
- Dash
- Date and Time Stamp of when it was created (MMDDYYYYHHMMSS format).

If you plan to create a folder for each client, you should include the job name as part of the file name, probably putting it first so that the client can easily see which statements are associated with each job.

Options Tab

The screenshot shows the 'New Statement Information' dialog box with the 'Options' tab selected. The dialog has three tabs: 'Statement Information', 'Options', and 'Statement Comments and more'. The 'Options' tab contains the following settings:

- Spoilage Adjustment Method:** Radio buttons for 'None', 'Percentage', and 'Pieces' (selected). A text field for 'Spoilage Adjustment Pieces' contains '0'. A checkbox for 'Calculate Spoilage On Lowest Rates' is checked.
- Adjustment Type:** Radio buttons for 'Spoilage' (selected) and 'Shortage'.
- Options:** Radio buttons for 'Generate 8125/8017' with options 'None', '8125/8017' (selected), '8125/8017-C', and '8125/8017-C Commingle'. Checkboxes for 'Optional Procedure' (checked), 'Check Request', 'Drop Ship' (checked), and 'Update Container Group ID to Zip-Ref' (unchecked). A checkbox for 'Create Separate 8125/8017 for Each Statement' is unchecked.
- Applied Method *:** Radio buttons for 'Neither' (selected), 'Lowest', and 'Correct'. A text field for 'Applied Rate' contains '0.0000'.
- Balance Paid By *:** Radio buttons for 'PERMIT' (selected), 'TRUST', 'METER', 'STAMPS', and 'CHECK'. A dropdown menu for 'Permit/Trust' is set to 'PERMIT'.

At the bottom of the dialog, there are three buttons: 'Generate Statements', 'Cancel', and 'Help'. A note at the bottom left states '* If applicable.'

Spoilage Adjustment Percent - removes pieces from the statements to reflect estimated spoilage across all rate categories.

Calculate Spoilage On Lowest Rates - removes the indicated amount of spoilage from the lowest rates in the mailing statement.

Options Checkboxes - toggle to turn on or off

Generate 8125 - Choose an 8125 radio button option in order to have the system automatically create an 8125 for your destination entry point postage statements.

Optional Procedure - If you participate in the USPS Optional Procedure program, check this box and you will be able to run our Optional Procedure report from the Reports menu of Statements for DAT-MAIL.

Check Request - Check this box if you would like the postage amount added to your Check Request report for your Accounting department.

Drop Ship - Creates consolidated statements in addition to individual statements.

Update Container Group ID to Zip-Ref - Check this box if you'd like this ID to print in the Zip Reference box of the postage statement.

Applied Method/Balance Paid By - If your Mail.dat file has postage affixed, this section of the screen will become accessible and you must enter the amount applied and how the balance of funds will be paid if postage is not affixed at the correct rates. This button will appear if you have purchased the optional module for Confirm ASN/Entry Information. Inside, you can check a box "Planet Code All Pieces" and then enter the Planet Code number. The planet code can also be entered at the Segment View.

Prepared By - Choose from your employee list or add new. Their name and initials will appear on the postage statement if you have selected this option in Program Setup of Statements for DAT-MAIL (under the File menu).

Carrier - Choose from your carrier list or add new. Their name will print on the 8125 form in box 12a if you have selected this option in "Program Setup" of Statements for DAT-MAIL (under the File menu).

Statement Comments and more Tab

The screenshot shows a window titled "New Statement Information" with three tabs: "Statement Information", "Options", and "Statement Comments and more". The "Statement Comments and more" tab is active. It contains three text input fields labeled "Comment 1:", "Comment 2:", and "Comment 3:". Below these are six text input fields for users, arranged in two columns: "User 1:", "User 2:", "User 3:" on the left and "User 4:", "User 5:", "User 6:" on the right. A small "..." button is located between the first and second columns of user fields. At the bottom of the main area is a checkbox labeled "Save these settings for Import Daemon's Auto Initialize option". At the bottom of the window are three buttons: "Generate Statements", "Cancel", and "Help".

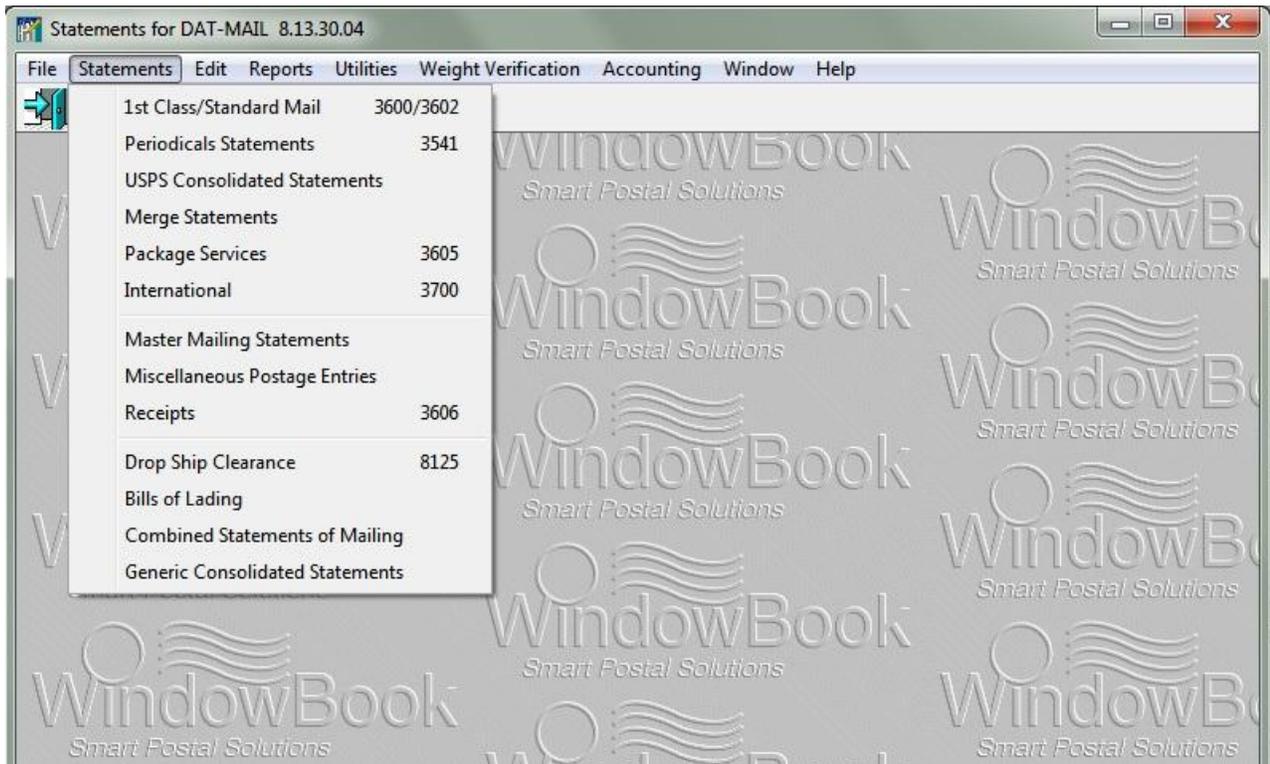
Comments 1, 2 and 3: Enter applicable statement comments if needed.

You can also access six User-defined fields for customizable data entry.

Once all info has been entered/adjusted on the tabs, press the **Generate Statements** button to return to the "Importing New File" screen and then hit **OK** to begin the Import process.

If you have not chosen to Print Statements Automatically, you can click on the "3602" Icon in the upper right hand section of this screen or any other screen in DAT-MAIL to enter Statements for DAT-MAIL at any time.

This screen will appear:



Click on the **Statements** menu to see the menu of statement lists to choose from:

First Class/Standard Mail 3600/3602 - A complete list of every First Class or Standard (A) postage statement you have generated.

Periodicals Statements 3541 - A complete list of every Periodical postage statement you have generated.

USPS Consolidated Statements - A complete list of the Consolidated Drop Ship postage statements you have generated. You also have access to printing and editing options of the corresponding 8125 form for each of the entry points on your Consolidated postage statement.

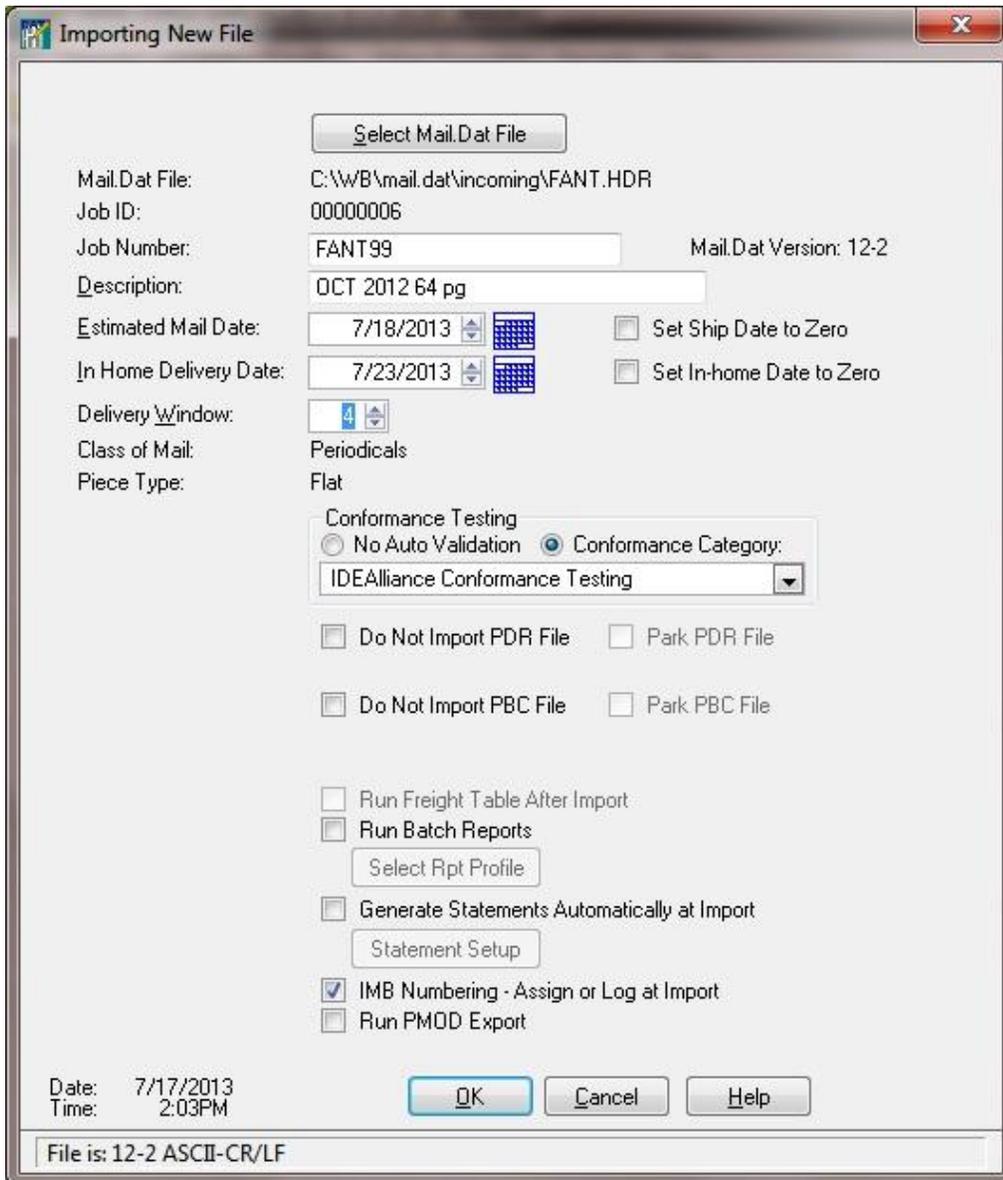
Note: The Consolidated postage statement is made up of all of the individual entry points of one mailing. You can choose to print the Consolidated form from this menu OR print the individual statement from the First Class / Standard Mail, Periodicals Statements or 3605 Parcel Services and Priority menu lists depending upon the class of mail.

3605 Parcel Services and Priority - A complete list of 3605 and 3600 postage statements

DAT-MAIL Manual Functions

How to Import a Mail.dat File

From the main menu press the second icon from the left, . If you point to the icon with your mouse pointer, a tip box will say "Import New Mail.dat file". You can also go to the "File" Menu and select "New Mail.dat Import" from the menu.



Press the **Select Mail.dat File** button and select the Mail.dat file you wish to import. It can have either a "ZIP" or "HDR" extension. If it is a zipped file, after you select the file, it will be

automatically unzipped and you will see the "HDR" extension appear in the File Select dialog.

The Job ID and Description will automatically appear on the screen. You may overwrite them with different information.

If no estimated mail date, in-home delivery date or delivery window is present in the file, you may assign this information during import. If another Mail.dat program has already populated these fields, the original information will be used.

If there are no estimated mailing dates, in-home delivery dates or delivery windows present, you may assign them. The delivery window will default to "3" when a Mail.dat file is selected.

Conformance Testing - the level of validation for this particular import can be selected here, ranging from "No Validation" to "PostalOne Testing". Testing level will default to your setup values but can be edited prior to import.

The "Do not Import Piece Detail File", "Do Not Import Package Quantity File" checkboxes will default to your setup values in the Program Setup tabs, but you can override them for this specific import on this screen.

If you check "Generate Statements Automatically at Import", a button will come up giving you access to enter your Statement Information.

Press **OK** to begin the import. The time it takes to import will vary with the density of the mailing, its entry plan and whether you are reading the data from a network or local drive. You can transfer these imported files to other users in the DAT-MAIL "TPS" format to eliminate the need to import the same files elsewhere. You can also share imported data over the network. There is no limit to how many users can view the same Mail.dat file. These functions can replace hard copy reports on the production floor if you have workstations in the proper locations.

Automatic Unzip Troubleshooting

Importing a file whose unzipped file name is already present in your default Mail.dat directory.

We know the file name inside the zip file by saving a list of all the "HDR" files in the directory before the unzipping is done and then checking this list after the unzipping is completed. The 'new' file is the one automatically selected so if there is no new file, the program doesn't know which file to select.

There is more than one set of Mail.dat files in the zip file.

The program will only select the first new file.

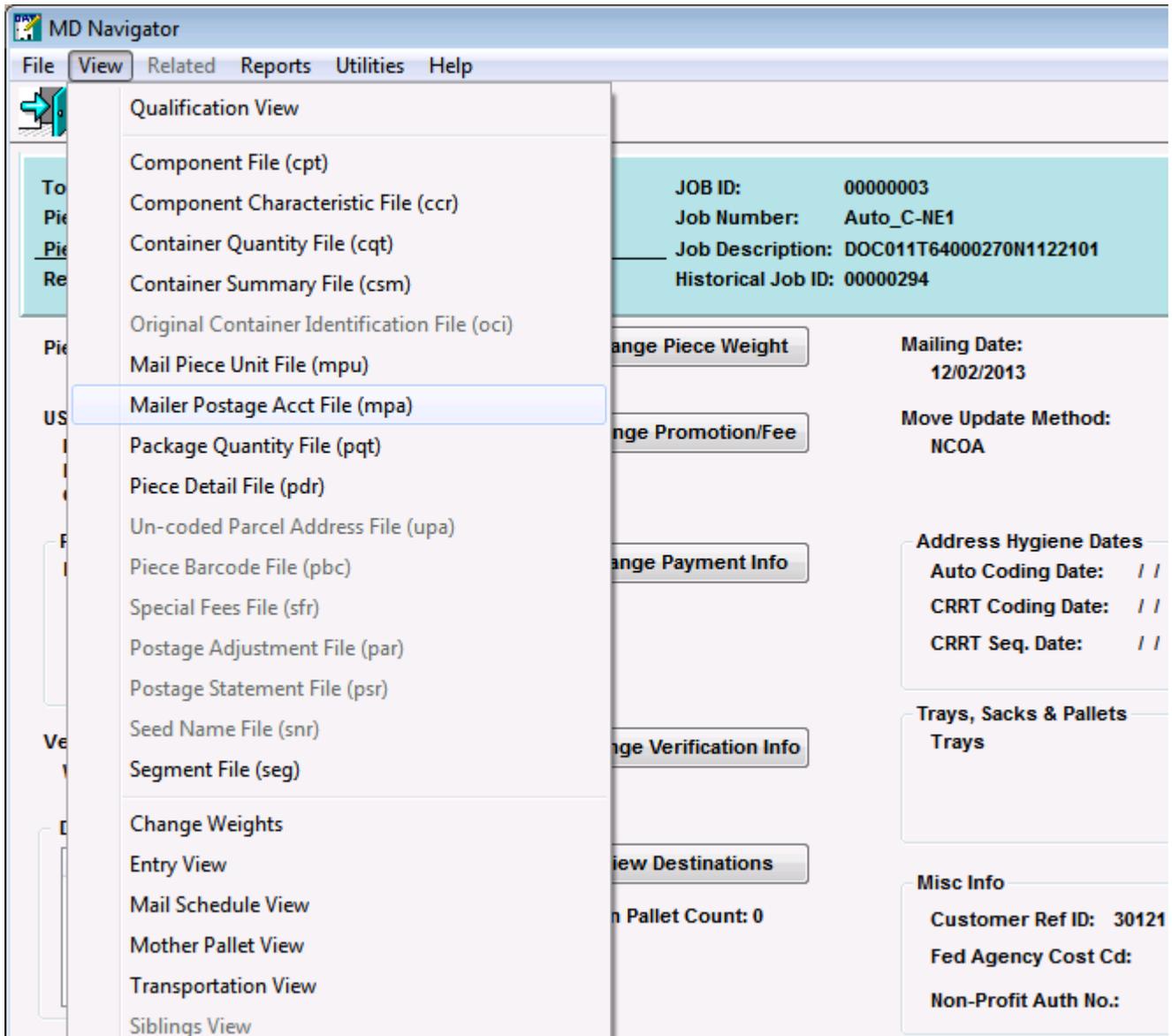
The default Mail.dat path selected in the Program Setup is invalid.

The program will unzip the files to that path (unless fast network import is enabled) so if it is invalid, the unzip will not work.

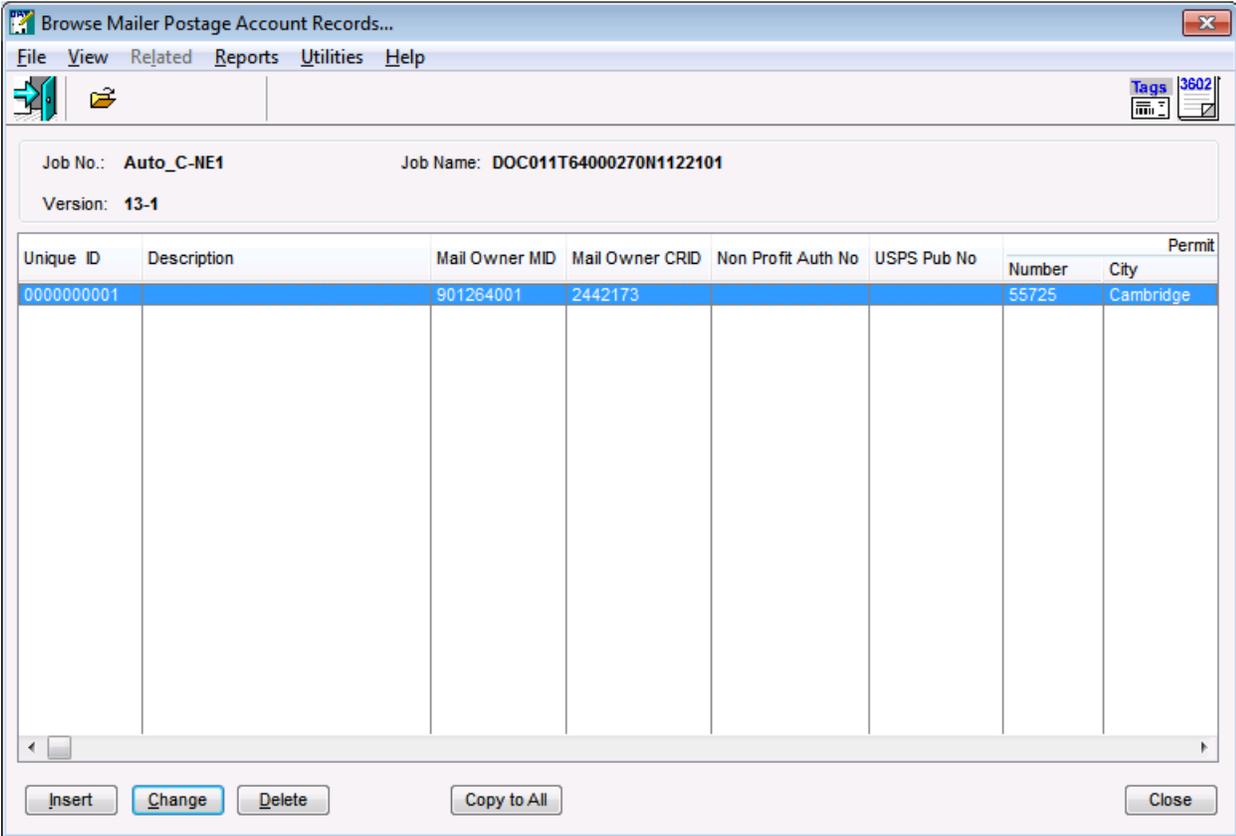
Editing the MPA File

In order to make changes to the MPA file you can open the file in the Navigator (Mailer Postage Acct file view):

(Note: The Navigator should appear automatically when you choose your mail.dat file from the DAT-MAIL main menu)



Click the "Mailer Postage Account File" menu item which brings you to this screen:



From here you can make changes to the file as necessary by clicking the **Change** button:

Changing Mailer Postage Information

File Edit Help

Job Number: **Auto_C-NE1** MPA - Unique Sequence/Grouping ID: **000000001**

General

MPA Description:

USPS Publication Number: ...

Permit Number: ...

Permit City:

Permit State: Zip:

Local Permit Number: ...

Local Permit Type: ▼

Postage Payment Option: ▼

Postage Payment Method: ▼

Customer reference ID:

Mailing Facility DUNS Number:

Permit Holder Identifier:

FACC:

Non-Profit Authorization No.:

Publication Title:

Mail Owner MID: ...

Mail Owner CRID: ...

Mail Preparer MID: ...

Mail Preparer CRID: ...

CSA Applies For Periodicals: Yes No

Payment Account Number:

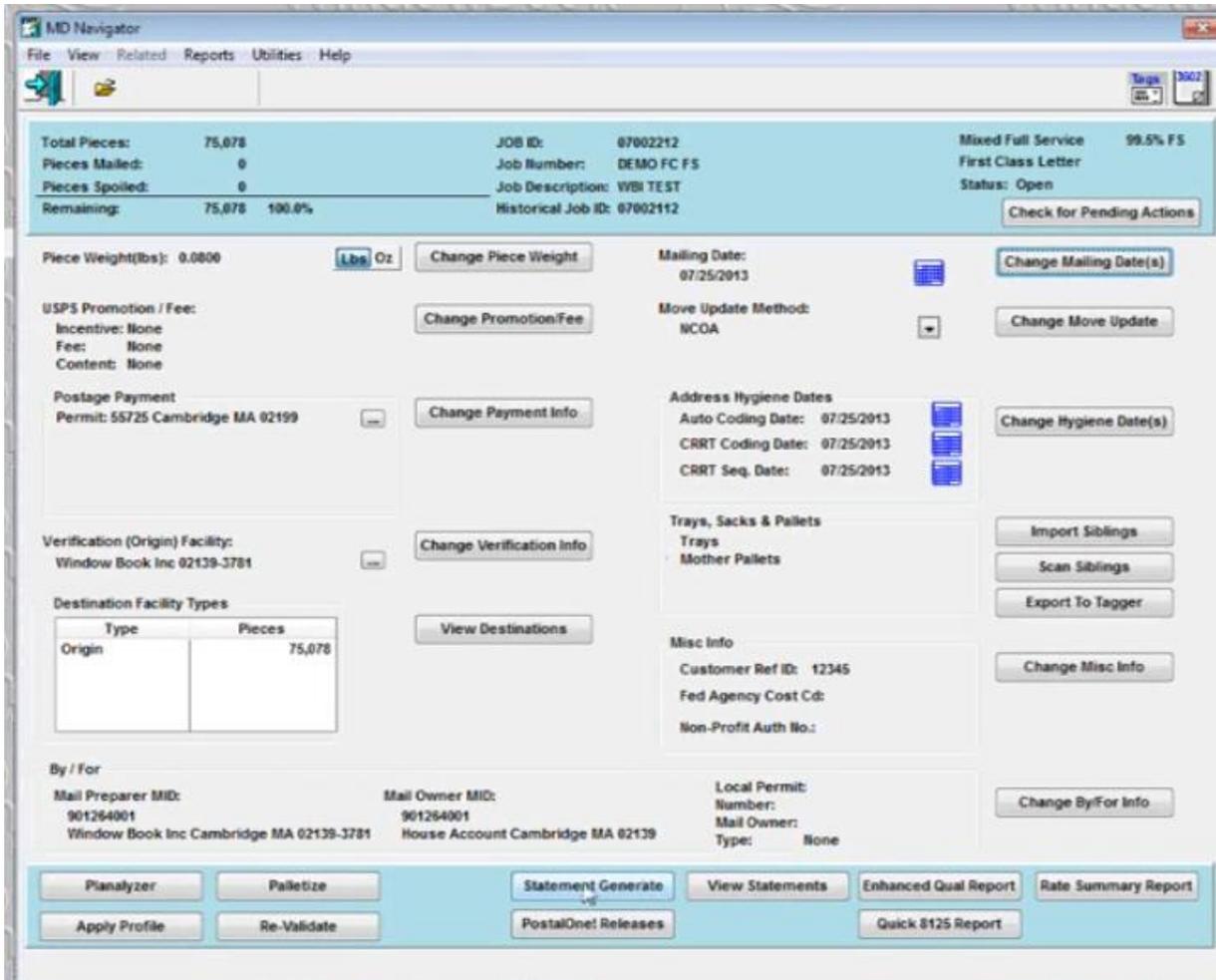
OK Cancel

From this screen can add (or edit) a Description, or change any information such as Permit Number, MID or CRID, Mailing Facility DUNS number, as appropriate...

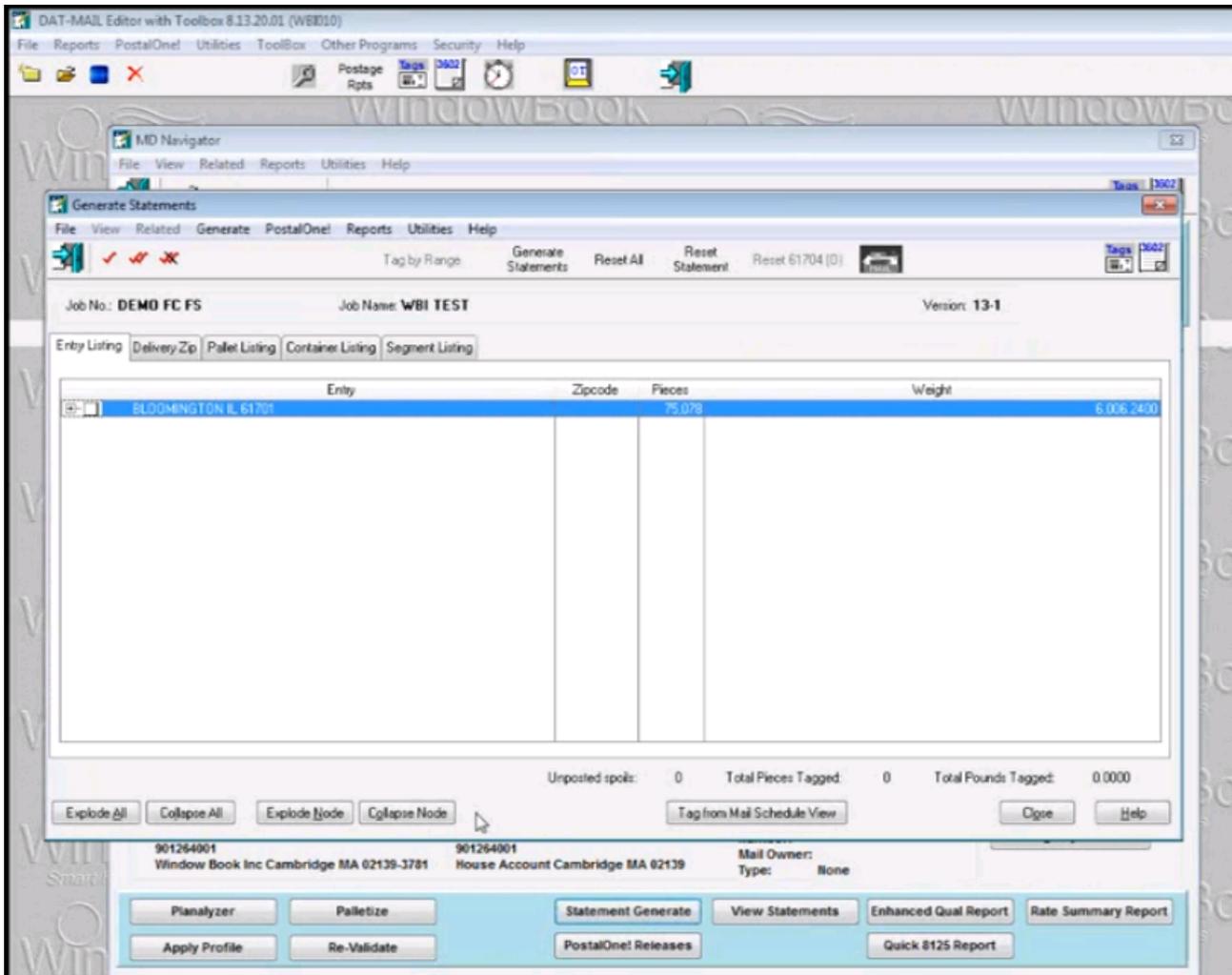
Generating the Postal One! Release

How to generate the PostalOne! release from DAT-MAIL

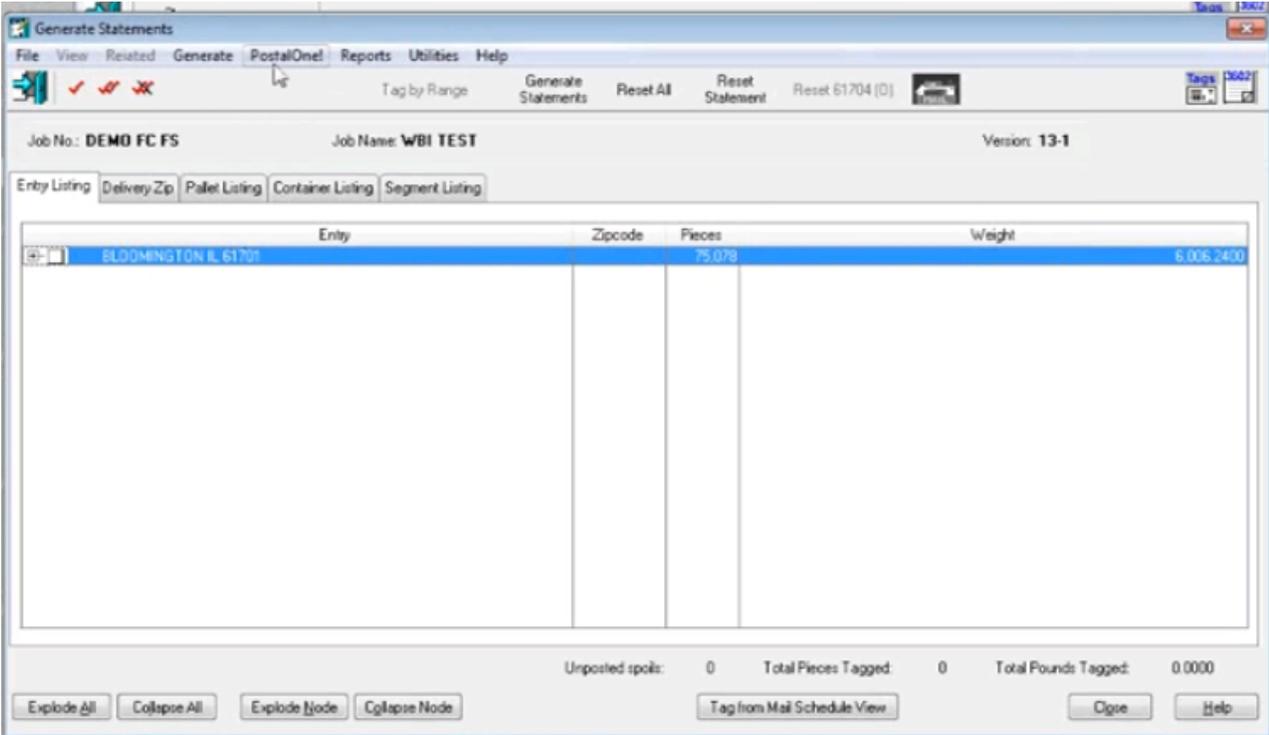
Step 1 - From the Navigator screen click the **Statement Generate** button:



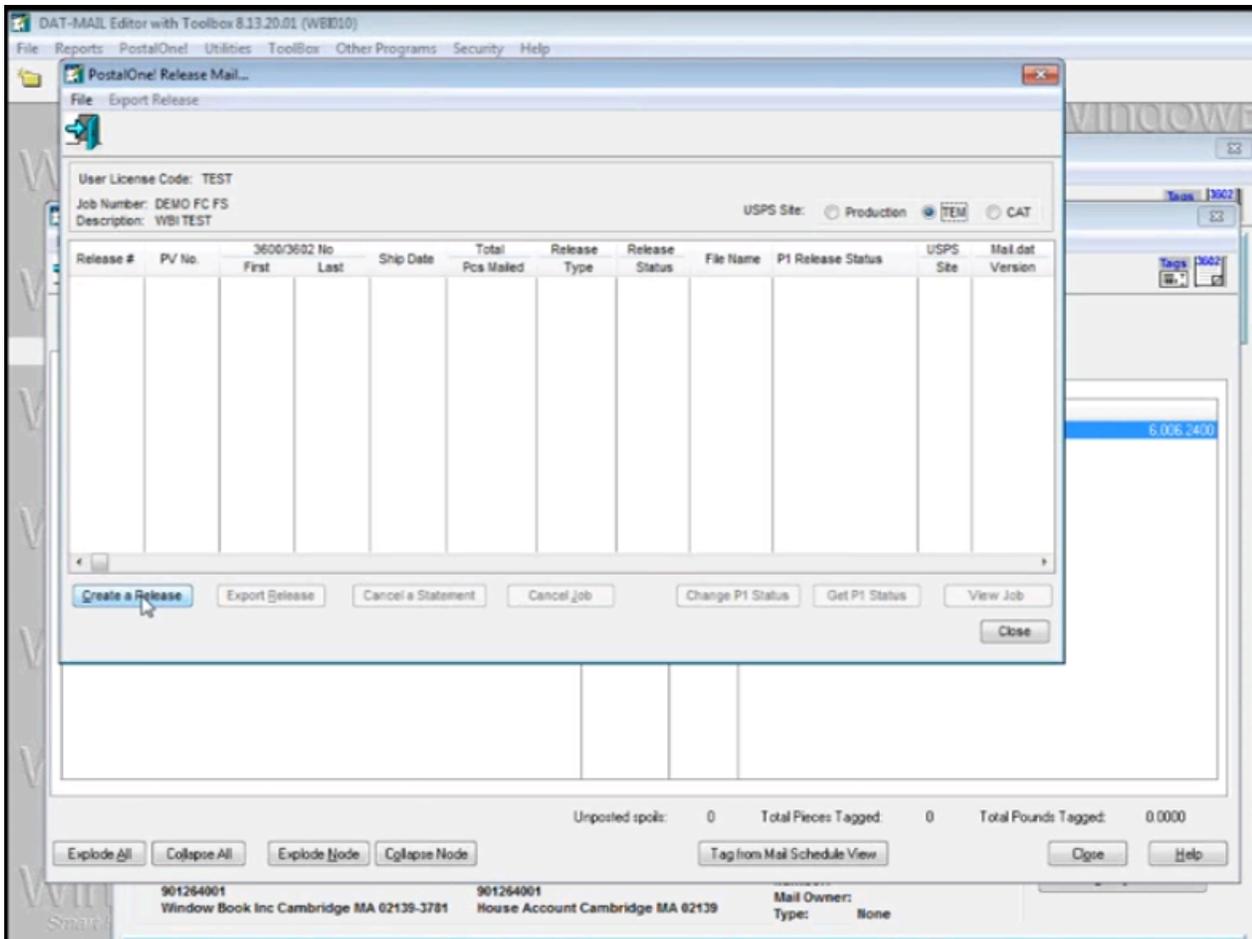
Step 2 - Check the box next to the entry point from which statements are to be created and click "**Generate Statements**" on the top tool bar. When Statement Generate is complete you will receive a "**Successful Generation**" message.



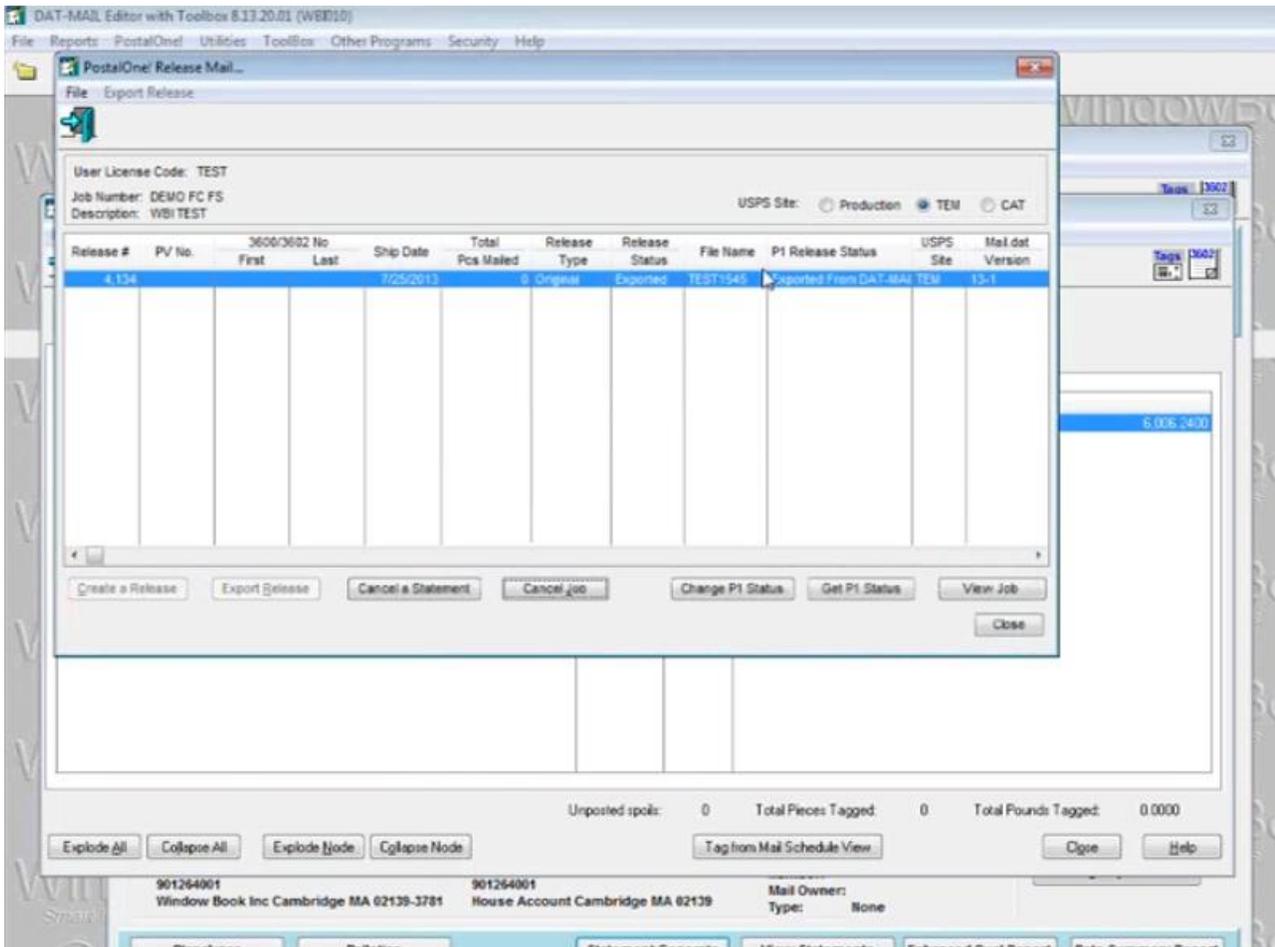
Step 3 - Click on the PostalOne! button on the top toolbar



Step 4 - Click the **Create a Release** button to create your PostalOne! release for upload to the USPS:



Step 5 - The release is now ready for upload to the Production environment (or TEM for testing).



The next sequence (uploading the PostalOne! release to the dashboard) is shown in the "Uploading to PostalOne! Release" section of this manual...

Postal One! Functions

Uploading the DAT-MAIL PostalOne! Release

After you have made the PostalOne! release in DAT-MAIL it can then be uploaded to PostalOne! for processing. Once uploaded, validated by PostalOne! and accepted, the job will appear on the Business Customer Gateway Dashboard.

The process for doing this is outlined below.

Step 1 - Log in using your PostalOne! username and password:

The screenshot shows a web browser window titled "PostalOne! Mail.dat Client Application 36.0.0_TEM". The page features the United States Postal Service logo in the top left and navigation links for "PostalOne! SITE", "HELP", and "SETTINGS" in the top right. The main content area is titled "Sign In" and is divided into two sections: "Existing Users" and "New Users".

Existing Users

Fill in the following information:

Username:

Password:

[Forgot Password](#)

[Sign In >](#)

New Users

Register now for USPS PostalOne! services through the Business Customer Gateway. When the registration is complete, a username and password will be provided to access this application.

[Sign Up >](#)

Restricted Information

WARNING! FOR OFFICIAL USE ONLY

This is a U.S. Government computer system and is intended for official and other authorized use only. Unauthorized access or use of this system may subject violators to administrative action, civil, and/or criminal prosecution under the United States Criminal Code (Title 18 U.S.C. § 1030). All information on this computer system may be monitored, intercepted, recorded, read, copied, or captured and disclosed by and to authorized personnel for official purposes, including criminal prosecution. Any authorized or unauthorized use of this computer system signifies consent to and compliance with postal service policies and these terms.

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- [Inspector General >](#)
- [Postal Explorer >](#)

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Step 2 - Select the "Job Validation/Upload" red menu option:

The screenshot shows the PostalOne! Mail.dat Client Application interface. The title bar reads "PostalOne! Mail.dat Client Application 36.0.0_TEM". The main header features the United States Postal Service logo and navigation links: "PostalOne! SITE | PERSONAL PROFILE | HELP | LOGOUT | SETTINGS". A red navigation bar contains three options: "Home", "Job Validation/Upload", and "Upload Metrics". Below this, a breadcrumb trail shows "Validation/Upload History - Mail.dat" as the active page, with other tabs for "Validation/Upload History - Mail.XML", "Common Errors Summary - Mail.dat", and "Common Errors Summary - Mail.XML".

The main content area is divided into a "Filter Criteria" sidebar on the left and a data table on the right. The "Filter Criteria" sidebar includes fields for "From:" (08/28/2013), "To:" (11/15/2013), "By Job ID:", "By Job Status:" (set to "All Jobs"), "By CRID:" (with "All" and "None" options), and "Order By:" (radio buttons for "CRID" and "Company Name"). A search box contains the text "2442173 WINDOW BOOK, INC. 02139-2" and a "Submit" button is located at the bottom of the sidebar.

The data table has the following columns: Job ID, File ID, CRID, Submission Date, Client Validat... Completion D..., Server Proce... Completion D..., File Size, File Status, Submission Type, Submission Status, and Po St. The table is currently empty.

At the bottom of the page, there are four columns of links: "LEGAL" (Privacy Policy, Terms of Use, FOIA, No FEAR Act EEO Data), "ON USPS.COM" (Government Services, Buy Stamps & Shop, Print a Label with Postage, Customer Service, Site Index), "ON ABOUT.USPS.COM" (About USPS Home, Newsroom, Mail Service Updates, Forms & Publications, Careers), and "OTHER USPS SITES" (Business Customer Gateway, Postal Inspectors, Inspector General, Postal Explorer). A copyright notice "Copyright© 2011 USPS. All Rights Reserved." is at the bottom left.

Step 3 - Click on the "Add Jobs" link as shown here:

PostalOne! Mail.dat Client Application 36.0.0_TEM

UNITED STATES POSTAL SERVICE

[PostalOne! SITE](#) | [PERSONAL PROFILE](#) | [HELP](#) | [LOGOUT](#) | [SETTINGS](#)

[Home](#) | [Job Validation/Upload](#) | [Upload Metrics](#)

Job Validation/Upload

Jobs selected for validation/upload:

No jobs selected

[Add Jobs](#)

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Inspector General ›
Postal Explorer ›

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Step 4 - Highlight the Job to be added (in this example "TEST1985.zip") and click 'Open'

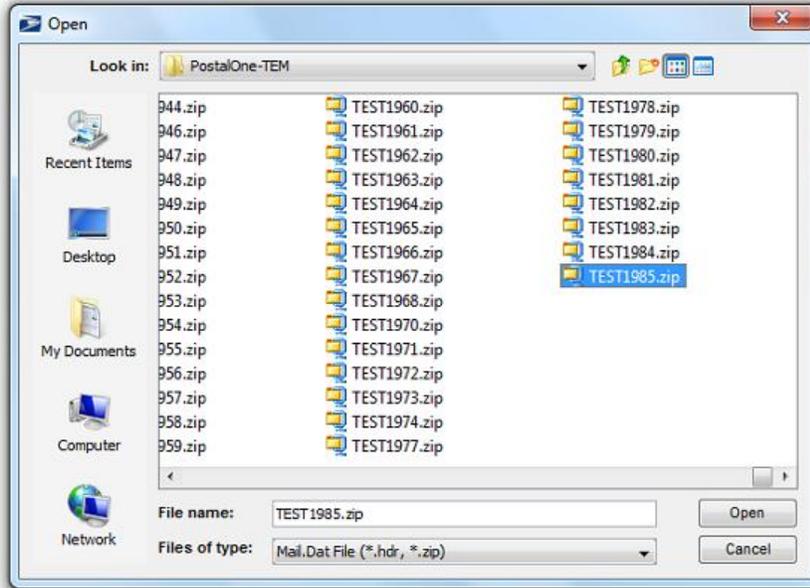


Job Validation/Upload

Jobs selected for validation/upload:

No jobs selected

[Add Jobs](#)



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Step 5 - Check the "Upload after Validation" radio button, then click "Validate and Upload"

The screenshot shows a web browser window titled "PostalOne! Mail.dat Client Application 36.0.0_TEM". The page header includes the United States Postal Service logo and navigation links: "PostalOne! SITE", "PERSONAL PROFILE", "HELP", "LOGOUT", and "SETTINGS". A red navigation bar contains "Home" and "Job Validation/Upload". The main heading is "Job Validation/Upload". Below it, it says "Jobs selected for validation/upload:" followed by a "Remove" link and the text "File Name: TEST1985 Job ID: 07002508".

Below the job information is a link for "Add More Jobs". Under the heading "Upload Selected Jobs?", there are two radio button options: "Just Validate Job(s)" and "Upload after validation", with the latter being selected.

A large button labeled "Validate and Upload" is centered on the page. Below the button, a message states "Files will be uploaded." with a globe icon.

The footer contains four columns of links: "LEGAL" (Privacy Policy, Terms of Use, FOIA, No FEAR Act EEO Data), "ON USPS.COM" (Government Services, Buy Stamps & Shop, Print a Label with Postage, Customer Service, Site Index), "ON ABOUT.USPS.COM" (About USPS Home, Newsroom, Mail Service Updates, Forms & Publications, Careers), and "OTHER USPS SITES" (Business Customer Gateway, Postal Inspectors, Inspector General, Postal Explorer).

At the bottom left, it says "Copyright© 2011 USPS. All Rights Reserved."

Step 6 - After being chosen the job is validated by PostalOne!. PostalOne! Validation includes things like checking and confirming MIDS and CRIDS and validating the permit numbers used in the Job. Click the "Accept Agreement" button.

PostalOne! Mail.dat Client Application 36.0.0_TEM

 [PostalOne! SITE](#) | [PERSONAL PROFILE](#) | [HELP](#) | [LOGOUT](#) | [SETTINGS](#)

[Home](#) | [Job Validation/Upload](#) | [Upload Metrics](#)

Job Validation/Upload

The sending of this file certifies that:

If an agent sends this file, the agent certifies that he or she is authorized to send on behalf of the mailer, and that the mailer is bound by the certification and agrees to pay any deficiencies. In addition, agents may be liable for any deficiencies resulting from matters within their responsibility, knowledge, or control.

For nonprofit organizations: (1) the mailing described by the file complies with DMM E670; (2) the income derived from the sale of any products or services advertised in the mailing is not subject to the Unrelated Business Income Tax (UBIT) and any products and services advertised are substantially related to the nonprofit organization's authorized purpose within the meaning of 39 U.S.C. § 3626(i)(1)(D)(i)(i) and 26 U.S.C. § 513(A); (3) the mailing, if made by a voting registration official, is required or authorized by the National Voter Registration Act of 1993; and (4) it will agree to pay, subject to appeal, any revenue deficiencies assessed on this mailing.

The mailer hereby certifies that all information furnished in this file is accurate, truthful, and complete; that the mail and the supporting documentation comply with all postal standards and that the mailing qualifies for the rates and fees claimed; and that the mailing does not contain any matter prohibited by law or postal regulation.

I understand that anyone who furnishes false or misleading information in this file or who omits information requested in this file may be subject to criminal and/or civil penalties, including fines and imprisonment.

[Accept Agreement](#)

[I do not accept](#)

LEGAL
Privacy Policy >
Terms of Use >
FOIA >
No FEAR Act EEO Data >

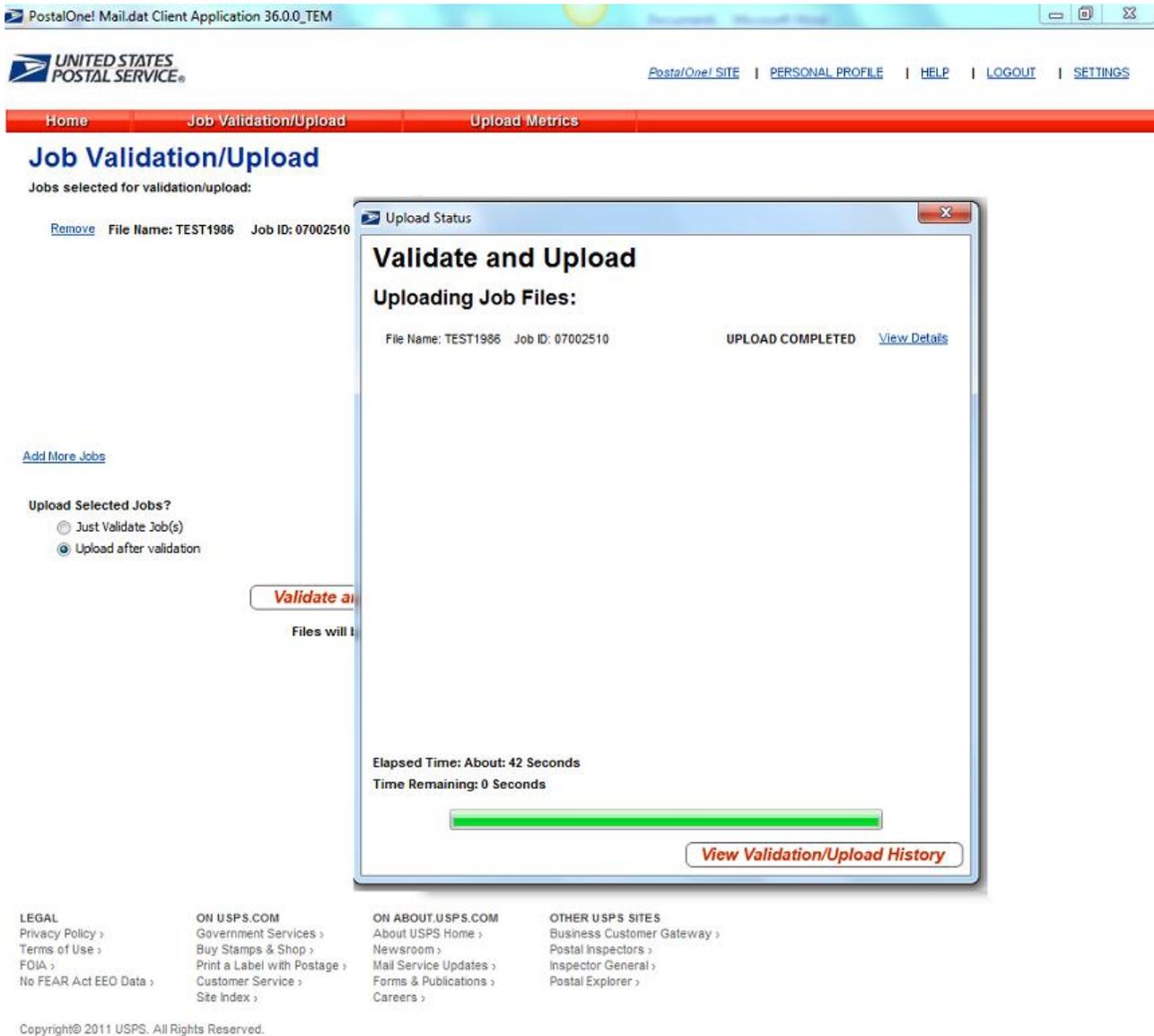
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A box will appear on the screen, showing the progress of the upload:



After the Job has been uploaded and validated it will appear in the Dashboard - to get there Click "view Validation History" and check for a 'Complete' message in the Submission Status column on the far right.

The Job is now complete and will appear on the Business Customer Gateway dashboard along with other jobs from your company that have been processed or are being processed (see example below).



Home Job Validation/Upload Upload Metrics

Validation/Upload History - Mail.dat Validation/Upload History - Mail.XML Common Errors Summary - Mail.dat Common Errors Summary - Mail.XML

Filter Criteria

From:

To:

By Job ID:

By Job Status:

By CRID:

Select: All None

Order By: CRID Company Name

2442173 WINDOW BOOK, INC. 02139-2

Job ID	File ID	CRID	Submission Date	Client Validati... Completion D...	Server Proce... Completion D...	File Size	File Status	Submission Type	Submission Status
07002510	TEST1987	2442173 WINDOW BOOK, INC. 02...	11/27/13 17:19	11/27/13 17:19	11/27/13 17:21	5.4MB	Update	Validation/Upload	Complete
07002510	TEST1986	2442173 WINDOW BOOK, INC. 02...	11/27/13 17:12	11/27/13 17:12	11/27/13 17:13	5.4MB	Original	Validation/Upload	Complete
00000340	NFDR0401	2442173 WINDOW BOOK, INC. 02...	11/26/13 17:58	11/26/13 17:58	11/26/13 18:00	14.5MB	Change	Validation/Upload	Complete
00000340	NFDR0399	2442173 WINDOW BOOK, INC. 02...	11/26/13 17:18	11/26/13 17:18	11/26/13 17:20	15.7MB	Original	Validation/Upload	Complete
07002508	TEST1985	2442173 WINDOW BOOK, INC. 02...	11/26/13 16:49	11/26/13 16:49	11/26/13 16:50	1.6MB	Original	Validation/Upload	Complete
07002508	TEST1983	2442173 WINDOW BOOK, INC. 02...	11/26/13 16:43	11/26/13 16:43	N/A	1.6MB	Original	Validation/Upload	Client Validat...
07002502	TEST1976	2442173 WINDOW BOOK, INC. 02...	11/26/13 09:00	11/26/13 09:00	11/26/13 09:03	5.4MB	Original	Validation/Upload	Complete
00000335	NFDR0393	2442173 WINDOW BOOK, INC. 02...	11/25/13 16:44	11/25/13 16:44	11/25/13 16:46	14.6MB	Change	Validation/Upload	Complete
00000334	NFDR0392	2442173 WINDOW BOOK, INC. 02...	11/25/13 16:39	11/25/13 16:39	11/25/13 16:40	1.3MB	Update	Validation/Upload	Complete
00000334	NFDR0391	2442173 WINDOW BOOK, INC. 02...	11/25/13 16:19	11/25/13 16:19	11/25/13 16:19	1.3MB	Original	Validation/Upload	Complete
00000335	NFDR0390	2442173 WINDOW BOOK, INC. 02...	11/25/13 16:08	11/25/13 16:09	11/25/13 16:11	15.7MB	Original	Validation/Upload	Complete
07002495	TEST1975	2442173 WINDOW BOOK, INC. 02...	11/25/13 14:24	11/25/13 14:24	11/25/13 14:25	14.9KB	Update	Validation/Upload	Complete
00000311	WIND0039	2442173 WINDOW BOOK, INC. 02...	11/25/13 13:27	11/25/13 13:28	11/25/13 13:29	10.2MB	Original	Validation/Upload	Complete
00000310	WIND0038	2442173 WINDOW BOOK, INC. 02...	11/25/13 13:09	11/25/13 13:10	11/25/13 13:11	10.1MB	Original	Validation/Upload	Complete
00000309	WIND0037	2442173 WINDOW BOOK, INC. 02...	11/25/13 12:38	11/25/13 12:39	11/25/13 12:40	10.1MB	Original	Validation/Upload	Complete
00001325	IMB50026	2442173 WINDOW BOOK, INC. 02...	11/25/13 12:36	11/25/13 12:36	N/A	11.4MB	Update	Validation/Upload	Server Validat...
00001325	IMB50025	2442173 WINDOW BOOK, INC. 02...	11/25/13 12:34	11/25/13 12:34	N/A	164.3KB	Update	Validation/Upload	Server Validat...
00001325	IMB50024	2442173 WINDOW BOOK, INC. 02...	11/25/13 12:29	11/25/13 12:30	11/25/13 12:31	11.4MB	Original	Validation/Upload	Complete
00000008	WBKA0003	2442173 WINDOW BOOK, INC. 02...	11/23/13 09:35	11/23/13 09:35	N/A	739.3KB	Update	Validation/Upload	Client Validator
00000008	WBKA0002	2442173 WINDOW BOOK, INC. 02...	11/23/13 09:30	11/23/13 09:30	N/A	342.5KB	Update	Validation/Upload	Client Validator
00000008	WBKA0001	2442173 WINDOW BOOK, INC. 02...	11/23/13 09:25	11/23/13 09:25	11/23/13 09:26	1.8MB	Original	Validation/Upload	Complete
07002498	TEST1971	2442173 WINDOW BOOK, INC. 02...	11/22/13 15:25	11/22/13 15:25	11/22/13 15:27	4.0MB	Update	Validation/Upload	Complete
07002498	TEST1970	2442173 WINDOW BOOK, INC. 02...	11/22/13 15:23	11/22/13 15:23	11/22/13 15:24	5.4MB	Original	Validation/Upload	Complete

- LEGAL
 - Privacy Policy >
 - Terms of Use >
 - FOIA >
 - No FEAR Act EEO Data >
- ON USPS.COM
 - Government Services >
 - Buy Stamps & Shop >
 - Print a Label with Postage >
 - Customer Service >
 - Site Index >
- ON ABOUT.USPS.COM
 - About USPS Home >
 - Newsroom >
 - Mail Service Updates >
 - Forms & Publications >
 - Careers >
- OTHER USPS SITES
 - Business Customer Gateway >
 - Postal Inspectors >
 - Inspector General >
 - Postal Explorer >

If validation fails:

If for any reason the validation fails you will see something like the following on the Dashboard - a "Validation Failed" message will be received.

Click 'View Validation Upload History' and see 'Client Validation Failed' in the Submission Status Column:

The screenshot shows the PostalOne! Mail.dat Client Application interface. The top navigation bar includes links for [PostalOne! SITE](#), [PERSONAL PROFILE](#), [HELP](#), [LOGOUT](#), and [SETTINGS](#). The main content area is divided into sections: Home, Job Validation/Upload, and Upload Metrics. The 'Job Validation/Upload' section is active, displaying a table of validation history. The table has columns for Job ID, File ID, CRID, Submission Date, Client Validation Completion Date, Server Process Completion Date, File Size, Status, Submission Type, and Submission Status. Two rows are visible, both with a 'Client Valid' status. The first row has Job ID 00001327, File ID IMB50027, and CRID 2442173 WINDOW BOOK, INC. 02... The second row has Job ID 00001327, File ID IMB50027, and CRID 2442173 WINDOW BOOK, INC. 02... The 'Submission Status' column for both rows is 'Client Valid'. The interface also includes filter criteria on the left, such as 'From:' (11/01/2013), 'To:' (12/11/2013), 'By Job ID:' (1327), 'By Job Status:' (All Jobs), and 'By CRID:' (2442173 WINDOW BOOK, INC. 02139-). A 'Submit' button is located at the bottom of the filter section. The footer contains links for LEGAL, ON USPS.COM, ON ABOUT.USPS.COM, and OTHER USPS SITES, along with a copyright notice: Copyright © 2011 USPS. All Rights Reserved.

Job ID	File ID	CRID	Submission Date	Client Validati... Completion D...	Server Proce... Completion D...	File Size	Status	Submission Type	Submissio... Status
00001327	IMB50027	2442173 WINDOW BOOK, INC. 02...	12/02/13 17:54	12/02/13 17:55	N/A	11.5MB	Original	Validation/Upload	Client Valid
00001327	IMB50027	2442173 WINDOW BOOK, INC. 02...	12/02/13 17:50	12/02/13 17:51	N/A	11.5MB	Original	Validation	Client Valid

Click on the Job-ID to display the validation error

PostalOne! Maildat Client Application 36.0.0_TEM

UNITED STATES POSTAL SERVICE®

PostalOne! SITE | PERSONAL PROFILE | HELP | LOGOUT | SETTINGS

Home | Job Validation/Upload | Upload Metrics

Validation/Upload History - Mail.dat | Validation/Upload History - Mail.XML | Common Errors Summary - Mail.dat | Common Errors Summary - Mail.XML

[Back to Validation / Upload History](#)

Job Validation / Upload Details

Job ID: 00001327
 Submission Date: 12/02/13 17:50
 Submission Type: Validation
 Version: 13-1
 Validation/Upload Duration: 00:01:03.000
 Status: Client Validation Failed [Print](#) | [Export](#)

File Extension	File Size	Key ID's	Field Name	Position	Code	Severity	Description
IMB50027.mpa	322B	MPA - Unique Sequence/Grouping ID: 0000000001	MPA-1103	58 - 65	3705	ERROR	The .mpa Permit Num associated with Finance Number 240799 and Permit Type PI does not have a non-profit status.

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 Privacy Policy >
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ON USPS.COM
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OTHER USPS SITES
 Business Customer Gateway >
 Postal Inspectors >
 Inspector General >
 Postal Explorer >

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Correct the validation error in DAT-MAIL and resubmit the job for validation until the 'Complete' message is received.

"Original Release" vs. "Updated Release"

For each Mail.dat file there is the initial "original" release and a second "updated" release generated by the DAT-MAIL software. These are both uploaded to the PostalOne! interface.

The original release is the original Mail.dat file with modifications from the DAT-MAIL software, and the "updated" release (also known as the "ready to pay" version of the file) should accurately represent the contents of the actual physical mailing that is being sent to the US Postal Service.

PostalOne! Help Desk Contact Info

Postal Once Customer Care:

<https://www.usps.com/postalone/contact.htm>

Screen shot (as of 11/18/2013):

The screenshot shows a web browser window with the URL <https://www.usps.com/postalone/contact.htm>. The page features the United States Postal Service logo and a navigation menu on the left. The main content area is titled "Contact PostalOne! Customer Care" and includes a list of services, contact information (e-mail, phone, and address), and two call-to-action boxes. The footer contains links for legal, USPS.com, about.usps.com, and other USPS sites.

UNITED STATES POSTAL SERVICE® [Home](#)

[National & Premier Accounts](#) > [Verify & Transport](#) > [PostalOne!](#) > [Contact PostalOne! Customer Care](#)

Contact *PostalOne!* Customer Care

We are here to help you.

Our trained and friendly Customer Care Center staff is eager to assist you. They will:

- Explain current features and benefits that are available to you.
- Guide you through the application process and explain the user agreements, request for computer access process, and site administrator's role.
- Answer technical questions about the *PostalOne!*® system, help with passwords, system logon, and clarify the file testing and transmission processes.

e-mail us:
postalone@email.usps.gov

Call us:
(800) 522-9085

Or write to us:
PostalOne! Customer Care Center
USPS-NCSC
225 N. Humphreys Blvd Ste 501
Memphis, TN 38188-1001

We encourage your questions, comments and feedback, and look forward to hearing from you.

Have a question?
You may find the answer in the [PostalOne! User Guide](#) or [Technical Guide](#).

Need Transportation information?
Find the number on our [Contact Transportation page](#).

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[Inspector General](#) ›
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Updating the USPS MDR Client Software

How to Install and Configure the *PostalOne!*® Mail.dat Client Software

The *PostalOne!*® Mail.dat Client software must be loaded onto the same computer where you will be running our MD Service Manager software, because Windows operating systems such as Vista, Win7, and Server 2008 do not allow a service to launch an application that is on a network share.

Do not load the USPS software into Program Files, because the USPS programs will update the Debug.log (and others) in its own folder. Some security models require administrator permissions to update files in Program Files.

There are three separate *PostalOne!* sites for uploading your Mail.dat files and each site has a specific *PostalOne!*® Mail.dat Client software package – one for PROD (production), Test Environment for Mailers (TEM) and Customer Acceptance Testing (CAT).

Mail.dat Service Manager can be configured to monitor any one, two or all of three of those sites when you are working with *PostalOne!*.

Download the USPS MDR Client software by logging into the Business Customer Gateway <https://gateway.usps.com/bcg/login.htm> and clicking on the Electronic Data Exchange link. You will then be directed to the Production or Test Environment for Mailers (TEM) area to download the respective software.

[Home](#) > [Electronic Data Exchange](#)

Electronic Data Exchange

Mail.dat Support for Production	
11-1 / 11-2 Mail.dat	08-2 Mail.dat Legacy
Download Client Application (Windows)	Metrics Search
Download Client Application (Solaris)	Metrics - File Transfer
Mail.xml	
Download Mail.xml WSDL Files	

Data exchange testing with *PostalOne!* Customer Support is required prior to activation for all electronic data exchange methods other than Postal Wizard. The *PostalOne!* system provides customers with a Test Environment for Mailers (TEM) to allow submission of jobs for validation processing in a non-production environment. This will provide mailers a way to test their file layouts and corresponding file submission/creation software prior to submitting jobs to the production application. The TEM environment will process the submitted files for the same validations that will be found in the production environment. It will also capture, log and display the error information in the same manner as the production environment for the mailers use in updating file layout and software processing.

Once you have downloaded the appropriate software (if applicable), you will initiate the test process by sending the Help Desk an email notifying them they are ready to begin testing. This email should include:

- Company Name
- Contact Name
- Phone Number
- Data Exchange Method (Mail.dat, Mail.XML, etc) and version (if applicable)

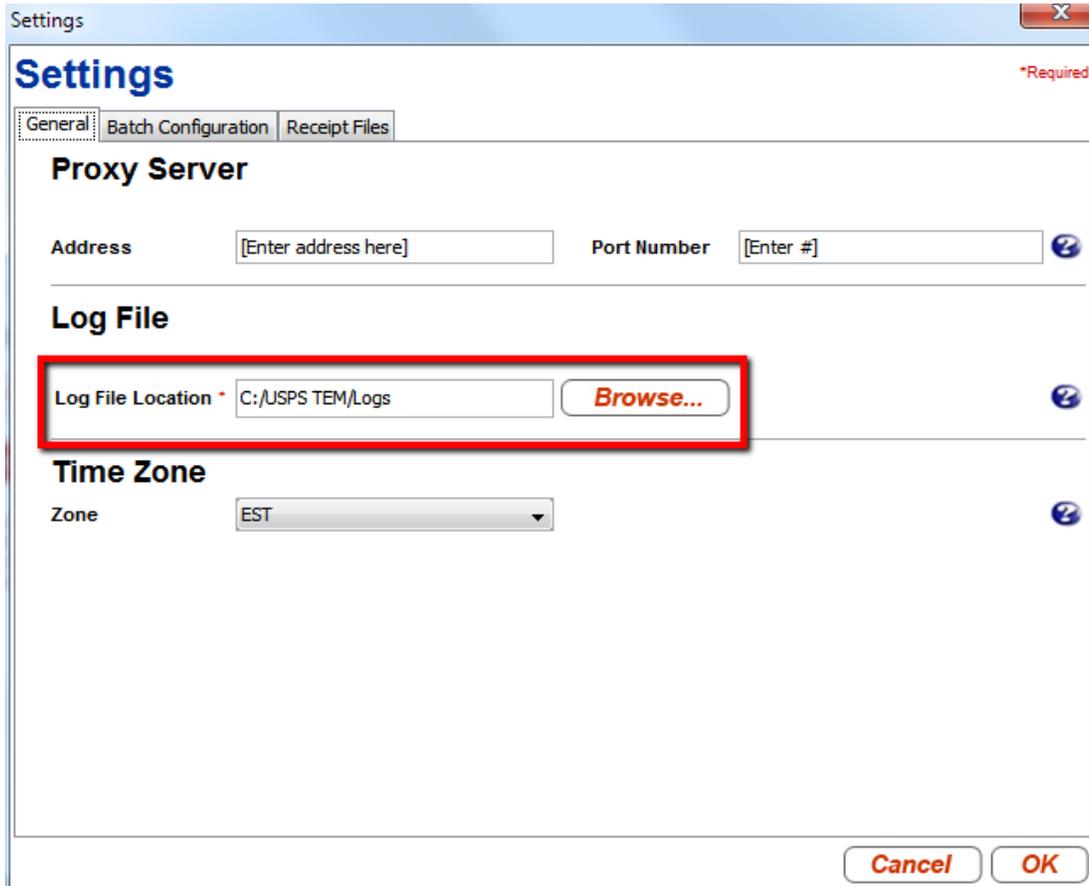
Test Environment for Mailers (TEM)	
11-1 / 11-2 Mail.dat	PostalOne! Postal Wizard
11-1 / 11-2 Mail.dat Guide	PostalOne! Guide
Download Client Application (Windows)	Start Testing - Notify Help Desk
Download Client Application (Solaris)	Go to TEM
Start Testing - Notify Help Desk	
Go to TEM	
Mail.xml	Parcel Return Service (PRS)
Mail.xml Guide	PRS Guide
Start Testing - Notify Help Desk	PRS Process
Download Mail.xml WSDL Files	Start Testing - Notify Help Desk
Verify Web Service in TEM	Go to TEM
Go to TEM	
Electronic Verification System (EVS)	
EVS Guide	
EVS Process	
Start Testing - Notify Help Desk	
Go to TEM	

Each *PostalOne!*® Mail.dat Client software package gets extracted into its own directory and each of those have their own Login and Settings information. After downloading the *PostalOne!*® Mail.dat Client software, make a folder and unzip the contents. A good example for naming your directory would be C:\USPS TEM\

Inside that folder you'll want to launch the **run-mdclient.bat** batch file and instead of logging in, go to the top/right of the screen and click on the **Settings** button to fill in the Batch Mode information. Follow the instructions below to set the necessary information we require in order to monitor your Mail.dat file statuses. Then click **OK**:



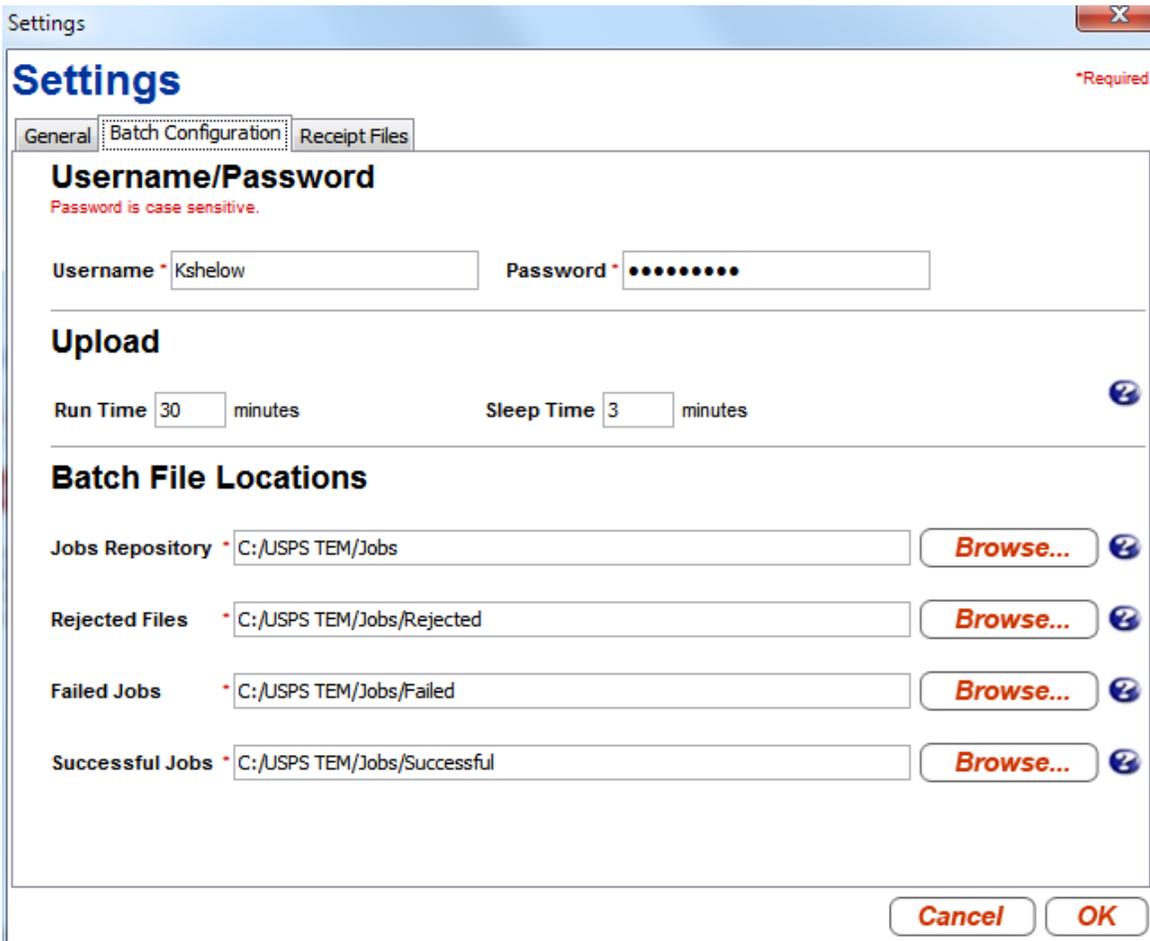
On the General tab, select a "Log" folder and set **your** "Time Zone". Highly suggest that the Log folder be created as such: C:\USPS TEM\Log.



On the Batch Configuration tab, enter the following information:

- Your *PostalOne!*® username and password
- Set upload run time (30) and sleep time (3)

- Define the Batch File locations. We strongly suggest creating these directories at the root of C:\USPS TEM used in this example:

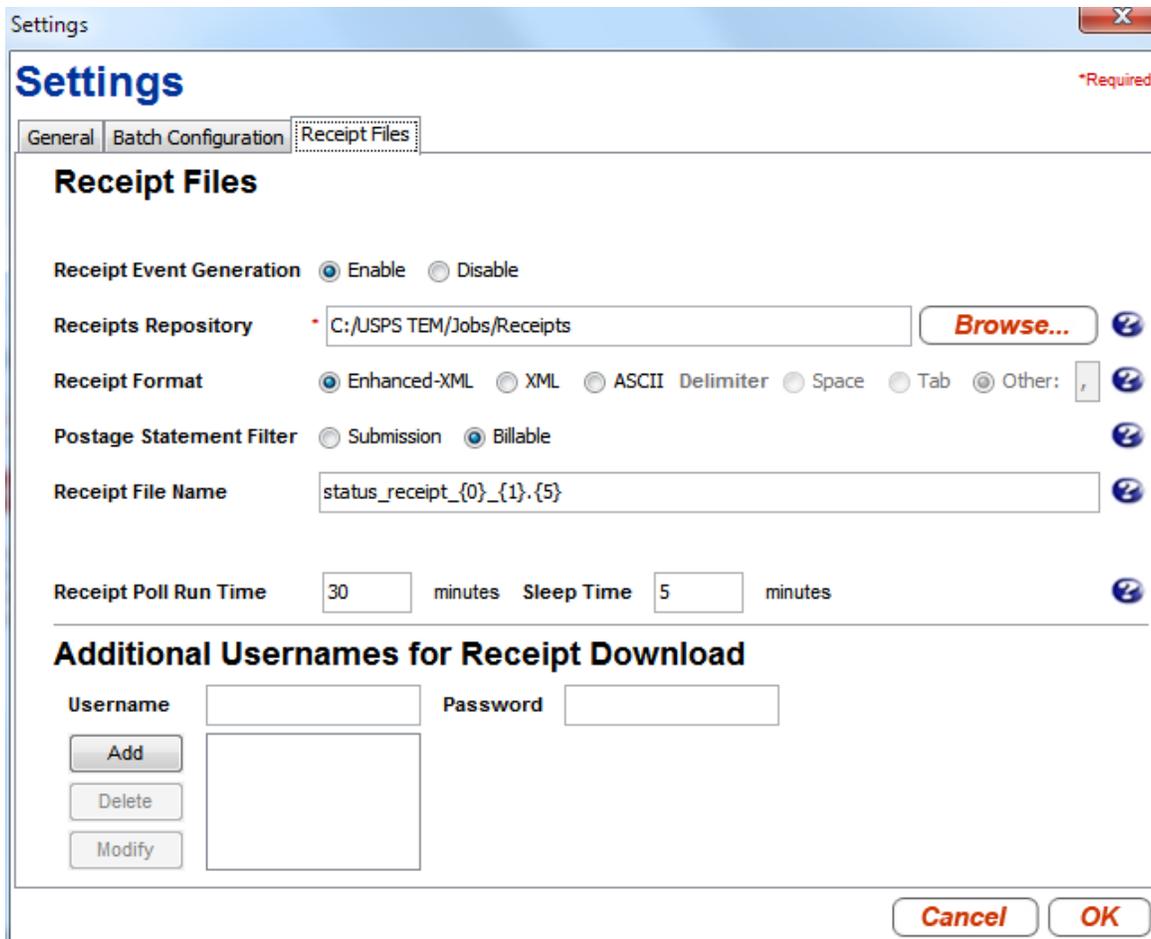


On the "Receipt Files" tab, enter the following information:

- Receipts Repository – folder where *PostalOne!*® Mail.dat Client Software saves receipts to. We strongly suggest creating this directory at the root of C:\USPS TEM\Jobs as shown in this example
- Receipt Format – choose *Enhanced XML*
- Postage Statement Filter – choose *Billable*
- Receipt File Name – use the following value: *status_receipt_{0}_{1}.{5}*

The {0} will be replaced by JobID, {1} will be replaced by date and time, and {5} will be replaced with TXT or XML. It is important to allow *PostalOne!*® Mail.dat Client Software to name the status receipts this way because "Receipts will stop downloading if a file with the same name already exists in that download folder" - (USPS technical spec).

- Set the receipt poll run time (30) and sleep time (5)



Turn Off Security Warnings on USPS MDR Batch Files

Some environments will warn you about running batch files and demand your input. Since the USPS MDR Client processes are started with batch files, it is important to log into the computer with the account that the Scheduler will be running under, then manually starting the two batch files.

Double click on **runBatchUpload.bat**. If you get a Security Warning box, be sure to **uncheck** the "Always ask before opening this file" and then click **Run**. After it starts, close the CMD.exe process it started. Repeat the above step for **runReceiptPoller.bat**. If you do not disable these Security Warnings, it is likely that when executed as a service they will fail to start. Repeat this step for each folder where USPS MDR Client software is installed (PROD, TEM, CAT).

If you launch either one of the .bat files and notice that the DOS window automatically appears then the Security Warning will not be an issue.

Stopping MD Service Manager and USPS MDR Client Sessions

There are times you may want to shut down MD Service Manager and the USPS MDR Client software (such as when the USPS MDR Client needs to be updated).

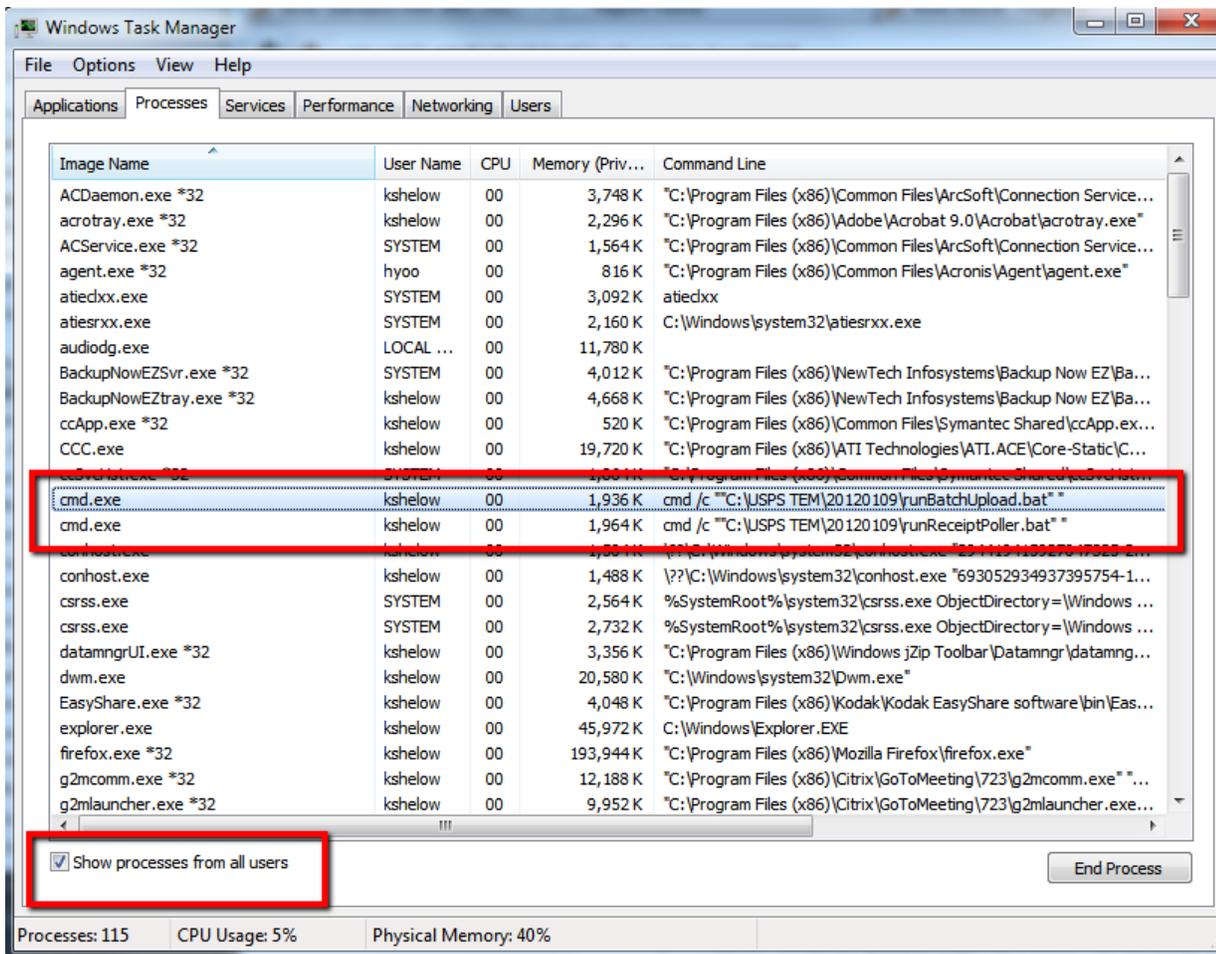
MD Service Manager runs as a service and, as such, the two USPS MDR Client processes are called from the service (there are two for each site being monitored – one for Mail.dat upload, and another for status receipt polling).

Services do not have a user interface and their processes do not display windows. You will not see the command processor (DOS window) running the USPS MDR Client software. This can pose challenges when you want to shut down the USPS MDR Client.

In order to stop MDSM, you will **first** need to either stop the WBI Automation Scheduler, or stop the MD Service Manager Plug-in.

- To stop the Window Book Scheduler, open the Control Center and press the Stop Service button.
- To stop the MD Service Manager Plug-in, highlight the service in the Window Book Scheduler Control Center and click the Edit button. Select 'End Date' and choose yesterday's date then click OK.

In order to stop the USPS MDR Client processes is to go to Task Manager and look for cmd.exe processes for all users. You can then End Process to close the runReceiptPoller.bat and runBatchUpload.bat sessions. If the Task Manager version can display the "Command Line" column (View menu, Select Columns) then you can look at the path to confirm that the process being stopped is the intended one.



Updating the USPS MDR Client:

Follow the previous step outlined in **Stopping MD Service Manager and USPS MDR Client Sessions**.

We do not recommend installing (or unzipping) a new USPS MDR Client over an existing installation. We have seen numerous times where the configuration data is wiped out which halts the monitoring process. The USPS also does not recommend installing over existing files.

The preferred recommendation is to:

Make a new folder each time there is new USPS MDR Client update and unzip the files there. If you followed our initial installation suggestion that your directory names would be patterned as such:

C:\USPS TEM or C:\USPS PROD or C:\USPS CAT, then your new directory name for a USPS MDR Client update might look this...

C:\USPS TEM\

C:\USPS TEM\

Or

C:\USPS PROD\

C:\USPS PROD\

Or

C:\USPS CAT\

C:\USPS CAT\

Reconfigure the new version of the USPS MDR Client software by following the steps outlined in **Configuring your *PostalOne!*® Mail.dat Client Software**. The existing General, Batch and Receipt directories can be re-used.

From the Window Book Scheduler Control Center, edit the MD Service Manager Plug-in for the expired USPS MDR Client by choosing 'Disable'. Create a new Configuration for the updated USPS MDR Client.

MDR Client Software updates

The USPS periodically makes updates in the *PostalOne!*[®] system to incorporate enhancements and bug fixes to the software. Major changes are performed when there are significant changes to postal rates or regulations (for instance when the USPS does a January price increase). Usually there are at least four *PostalOne!*[®] software updates during the year: January, April, July, and October. There can also be interim updates to *PostalOne!*[®] for immediate fixes or other system issues.

It is important to download and install the USPS Mail.dat Client software (also called MDR Client) as soon as it is available. This software can be downloaded from the [Business Customer Gateway](#) web site. You may also need to make any associated updates or configuration changes to software that interfaces with *PostalOne!* once the Mail.dat[®] Client software is updated.

MDR client update notification is by e-mail from the USPS. In order to receive notification of PostalOne! updates send an e-mail to dmmadvisory@usps.gov and ask to be added to the distribution list. You can also review previous DMM Advisory notices at <http://pe.usps.com/dmmadvisory.asp>. The software will also warn you if the MDR Client on your desktop is out of date and prompt you to download and install the latest version.

Recording and Saving DAT-MAIL Settings

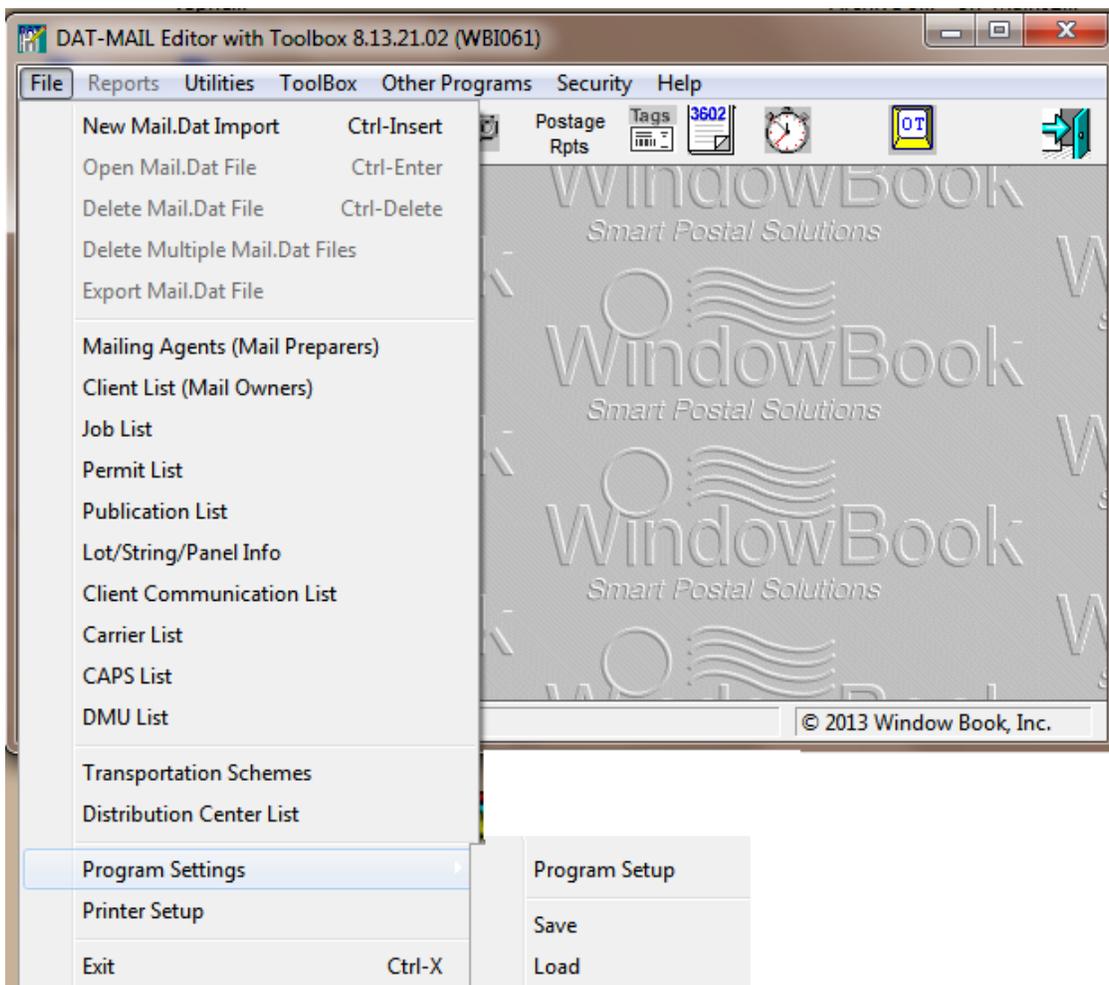
Making Screen shots of your settings

Making and saving screen shots:

To create and save a screen shot press the <Alt> <Print-Scrn> buttons together on your keyboard. Then paste the result (<Ctrl>-V) into a graphics file for instance a .jpg, .png or .bmp file. You can use MS Paint to save screen shots into individual files. You can paste more than one screen shot into an MS Word document (.doc or .docx) using the same procedure, if you want to save the information to a single document.

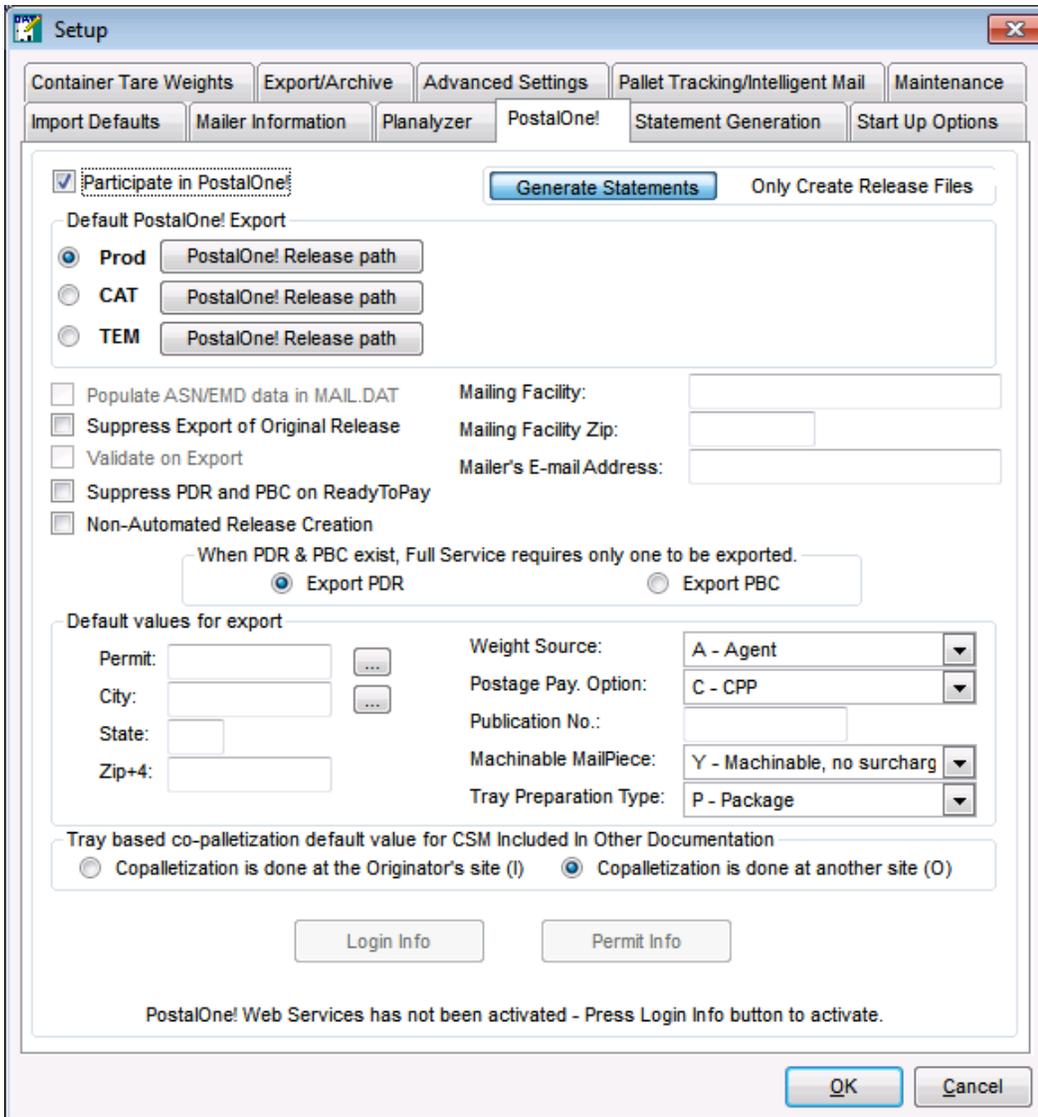
Examples:

From this menu:

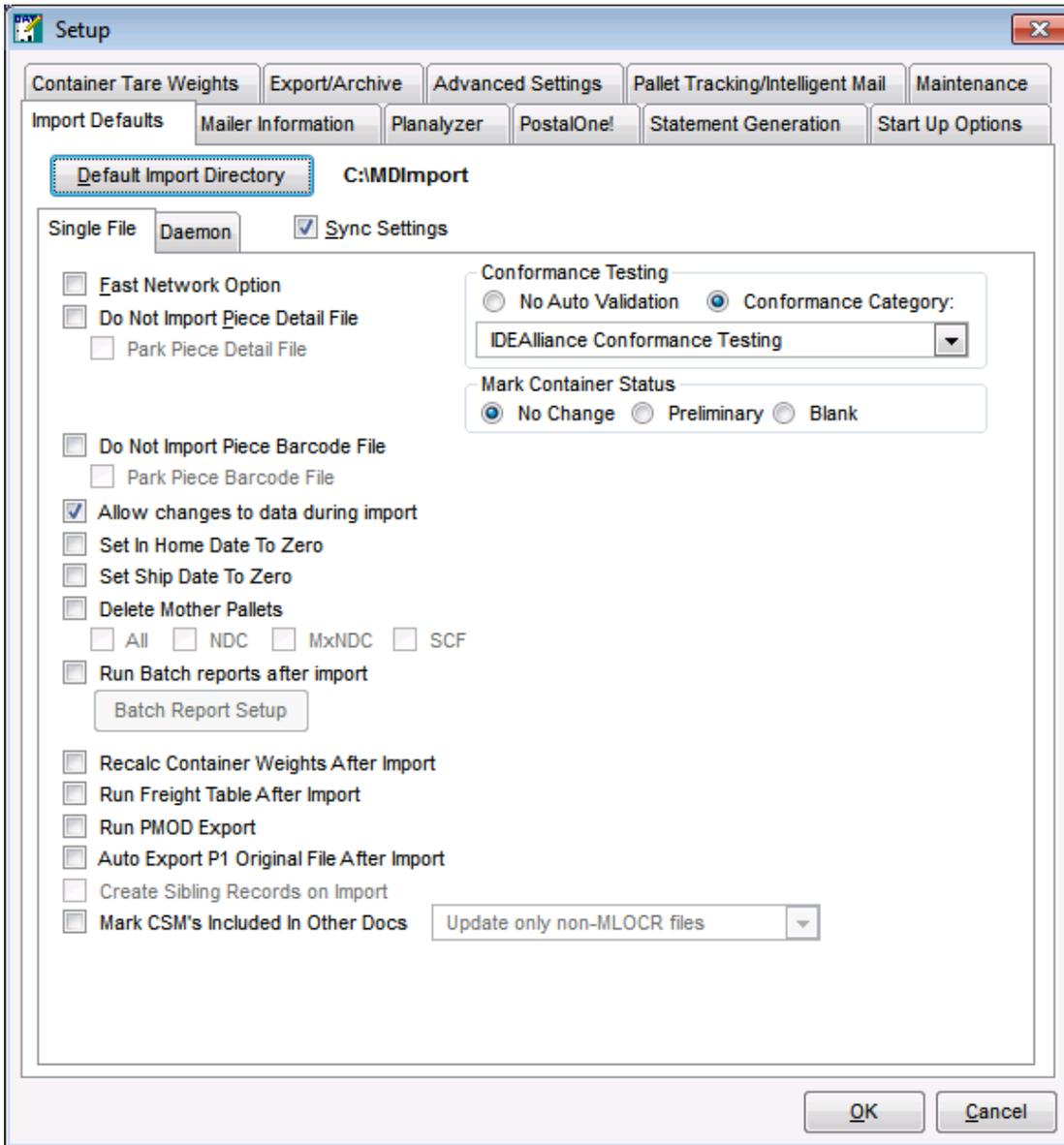


Click "Program Setup" and Choose the "PostalOne!" tab. You can then make a screen shot (see instructions above) and paste it into a graphics file (or a Microsoft Word Document).

Screen shot of PostalOne! settings (Program Setup screen):



Likewise for other Tabs on the 'Setup' screen, for instance the "Import Defaults" tab:



You can make and save screenshots of your Setup screens (or any other screens) in this way to keep the settings for future reference. For instance it could possibly be necessary at some point to re-install and re-configure the DAT-MAIL program after a computer hard drive failure.

How to Document Installation Settings

PURPOSE

The '*EII_Client_Information*' file was created in order to have as a reference, a Client's system settings in the form of screen shots as they appeared at the time of installation. This becomes a valuable reference tool should a re-installation or re-configuration of DAT-MAIL be required due to an event such as a hard drive failure. The file contains Client-specific worksheets that also house pertinent installation details like original installation date, name of the installer, installation type (single or multiple), file path information, etc. Each Client-specific worksheet is created by the person performing the install for the Client and is based on a worksheet Template that is also included in the file.

LOCATION AND ACCESSIBILITY

The '*EII_Client_Information*' file was created in MS Excel and then imported into Google Docs for ease of use by both Window Book and EII employees. To gain access to the file, it must be shared by the file's owner using a GMail address. To obtain a GMail address if you don't already have one, click the following link:

<https://accounts.google.com/SignUp?service=mail&continue=http%3A%2F%2Fmail.google.com%2Fmail%2F%3Fpc%3Dtopnav-about-en>

To request access to the file, contact Window Book's Laura Burish at lburish@windowbook.com. Make sure to include your GMail address with your request!

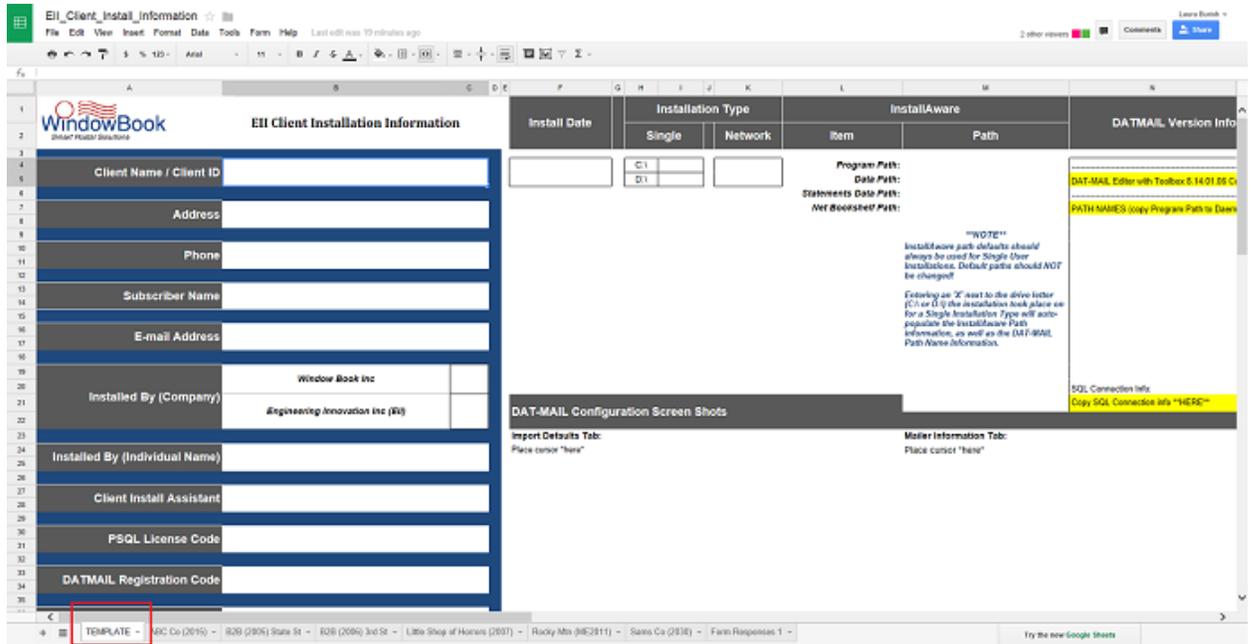
When the file has been shared with you, an invitation email will be automatically sent to your GMail Inbox along with a link to the file.

CREATING A NEW CLIENT WORKSHEET

A worksheet does not display in it's entirety in the viewing area of the screen; therefore up>down, and left>right scroll bars are available for navigating the worksheet.

To create a new Client worksheet, perform the following:

1. With the '*EII_Client_Information*' file open, select the 'TEMPLATE' worksheet from the horizontal list of names found at the bottom of the file;



- Click on the down-arrow that appears next to the name of the worksheet (i.e. TEMPLATE) and select 'Duplicate';



- The worksheet 'Copy of TEMPLATE' will be created and displayed. Click the down-arrow located to the right of the worksheet name (i.e. 'Copy of TEMPLATE') and select 'Rename...';

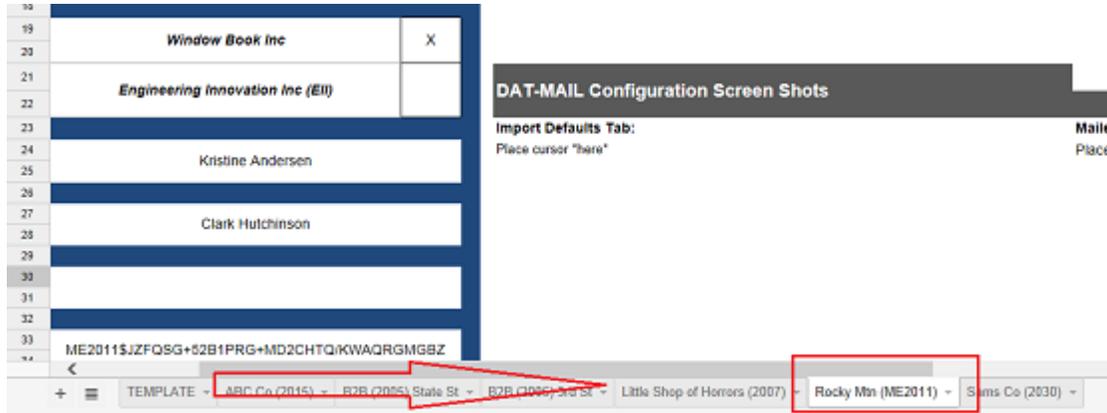


- Rename the worksheet using the Client's name and Client ID (e.g. Rocky Mtn (2011)). If more than one installation has occurred for this Client (same Client, different location), include a reference to the location where the installation took place, such as the street name. Press the **Enter** key on the computer key board after entering the name information for the newly created spreadsheet;



- Client worksheets should be kept in alphabetical order; however, the TEMPLATE worksheet should always remain at the head of the list (far left) for ease of use.

Single click, hold, and drag the newly created Client worksheet (i.e. 'Rocky Mtn (2011)') to its correct alphabetical position within the workbook;



Once the Client worksheet has been created, renamed, and moved to its correct position in the file, the installer can begin to fill in the necessary installation detail.

NOTE: Google Docs automatically saves any changes to a file as they occur; therefore, you are unable to perform any type of manual save of it. If you want to see what changes had been made since the last save or even prior to the last save, click the 'All changes saved in Drive' link located to the immediate right of the file's top-line menu.

COMPLETING A CLIENT WORKSHEET

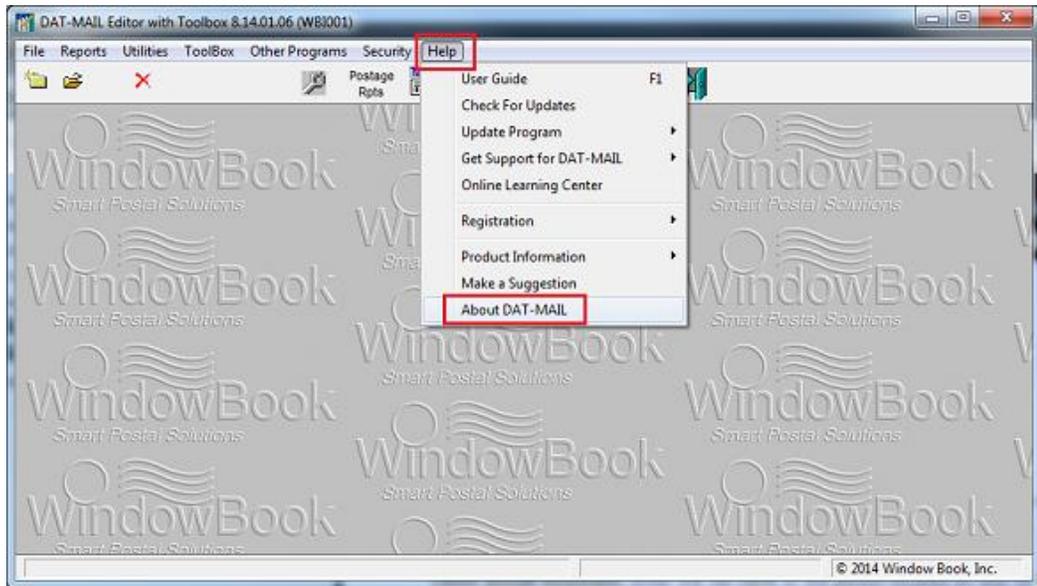
Once the Client worksheet has been created, the Installer can begin filling in the necessary fields. The Client worksheet should always be open on the Installer's PC, not the Client's PC/server. The following are the list of fields found on the Client worksheet and descriptions or instructions for each:

- **Client Name / Client ID**
- **Address**
- **Phone**
- **Subscriber Name**
- **E-mail Address**
- **Installed by Company:** Enter an 'X' in the appropriate field to signify whether the install was done by Window Book or EII.
- **Installed By (Individual Name):** Enter the first and last name.
- **Client Install Assistant:** Enter the full name of the person located on-site for the Client that assisted the installer.
- **PSQL License Code**
- **DATMAIL Registration Code**
- **IDEAlliance ULC**
- **Install Date:** Enter the full date in any format. Once the **Enter** key on the keyboard is pressed or if you tab out of the field, the field will automatically display the date in the following format: 'YYYY-Mmm-DD', e.g. Entering '2/9/14' will display as '2014-Feb-09' (there is a slight delay before the automatic format change takes place, so be patient).
- **Installation Type:** Enter an 'X' in the appropriate field to signify whether the installation type is a single install or a network (multiple user) install. Signifying a single install (installation occurred on either the C or D drive) will cause the various InstallAware path fields and DAT-MAIL Path Names to auto-populate. Signifying a network install will require manual entry of the various InstallAware path fields and (see Step 10 for more information on entering the network install/multiple user DAT-MAIL Path Name fields)

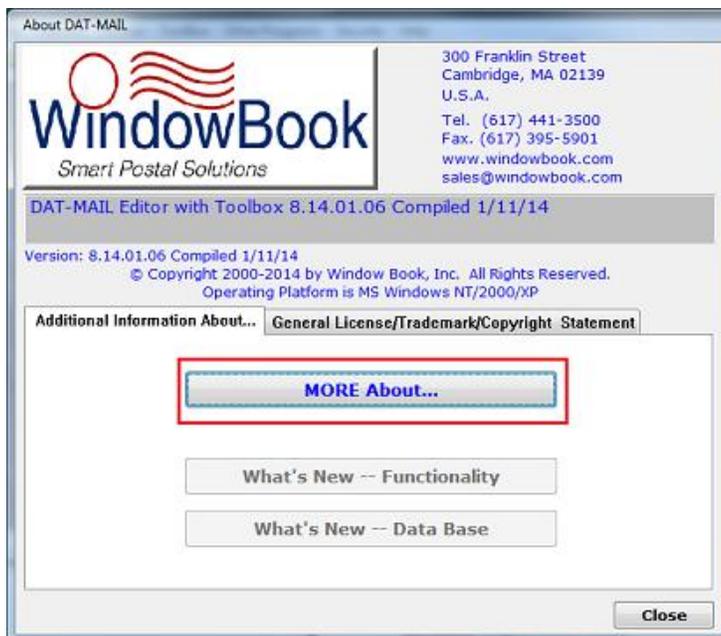
Installation Type		InstallAware		DATMAIL Version Info & Installation Folders
Single	Network	Item	Path	
C:\	<input checked="" type="checkbox"/>			<p>----- DAT-MAIL Editor with Toolbox 8.14.01.06 Compiled 1/11/14 -----</p> <p>PATH NAMES (copy Program Path to Daemon Inbox Path directly below this line)</p> <p>DAT-MAIL Program Path: C:\WB\MDV DAT-MAIL Data Path: C:\WB\MDV\DATA\ Statements Data Path: C:\WB\PMW\DATA\ Control Settings: C:\WB\MDV\DATA\mdbmdc.ini PM Control Settings: C:\WB\PMW\DATA\prnws.ini Weight Sheet Settings: C:\WB\PMW\DATA\prnws.ini Tag Printing Settings: C:\WB\MDV>tagcontrol.ini</p> <p>Default Import Path: C:\WB\mail.dat Default Archive Path: C:\WB\mail.dat\archive Daemon Inbox Path: C:\WB\mail.dat\incoming</p> <p>SQL Connection Info: Copy SQL Connection info **HERE**</p>
D:\	<input type="checkbox"/>	Program Path: C:\WB\MDV Data Path: C:\WB\MDV\DATA\ Statements Data Path: C:\WB\PMW\DATA\ Net Bookshelf Path: C:\WB	<p>**NOTE**</p> <p><i>InstallAware path defaults should always be used for Single User Installations. Default paths should NOT be changed!</i></p> <p><i>Entering an 'X' next to the drive letter (C:\ or D:\) the installation took place on for a Single Installation Type will auto-populate the InstallAware Path information, as well as the DAT-MAIL Path Name Information.</i></p>	

- **DATMAIL Version Info & Installation:** The required information for this field should be downloaded directly from the Client's DAT-MAIL software, saved to their PC/Server's Desktop and emailed by the Client, to the Installer. To do so, perform the following:

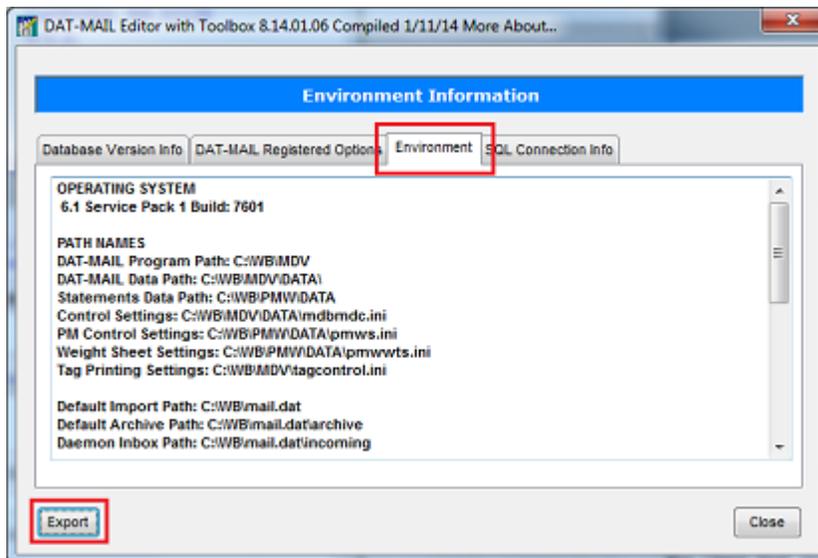
1. Launch the Client's DAT-MAIL software after the installation has taken place. From the top-line menu bar, click on 'Help' and then select 'About DAT-MAIL';



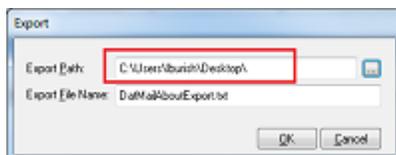
2. DAT-MAIL's *About DAT-MAIL* dialog will display. Click the **MORE About...** button;



3. The DAT-MAIL's *More About...* dialog will display. Click the 'Environment' tab to display the 'Environment Information' and then click the **Export** button;

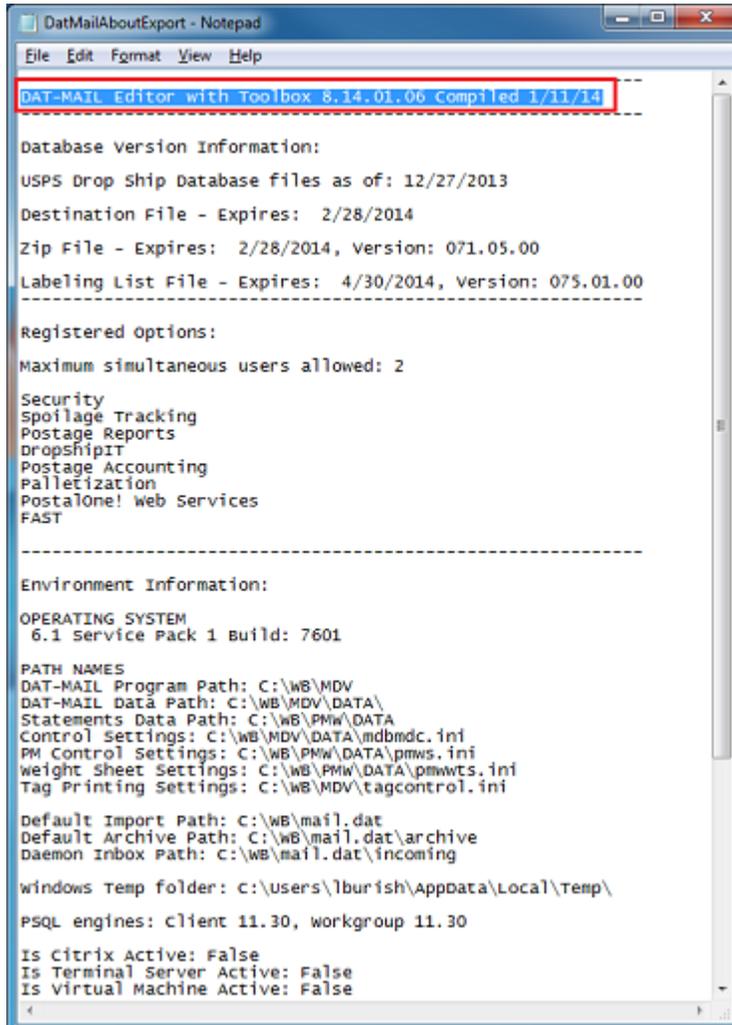


- An *Export* dialog will display. Make note of the export path where the environment information file will be saved to. If you'd like to change the path to something like the Client's PC's Desktop (recommended), click the Browse icon to the right of the Export File Path field and select the specific location you'd like the file to be exported to. Click the **OK** button;



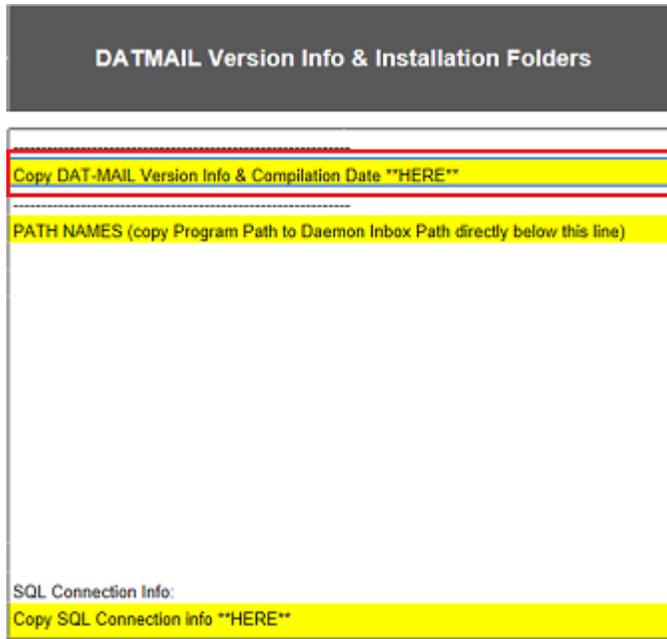
- Once the export is complete, the *Export Confirmation* dialog will display. Click the **OK** button;
- Have the Client or Subscriber email the 'DatMailAboutExport.txt' text file to the Installer;

7. Open the 'DatMailAboutExport.txt' file on the Installer's PC. Highlight the first line of text (i.e. "DAT-MAIL Editor with Toolbox...") (see image). With the line highlighted click the 'Edit' menu from the top-line menu bar and select the 'Copy' menu option (or using the PC's keyboard, while holding down the 'Ctrl' key, press the letter 'C');

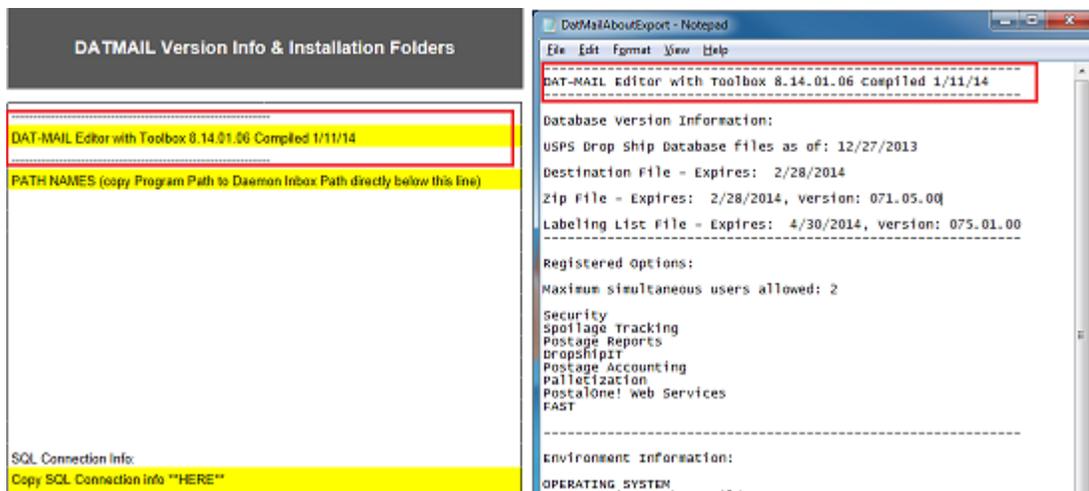


```
DAT-MAIL Editor with Toolbox 8.14.01.00 Compiled 1/11/14
-----
Database Version Information:
USPS Drop Ship Database files as of: 12/27/2013
Destination File - Expires: 2/28/2014
Zip File - Expires: 2/28/2014, Version: 071.05.00
Labeling List File - Expires: 4/30/2014, Version: 075.01.00
-----
Registered Options:
Maximum simultaneous users allowed: 2
Security
Spoilage Tracking
Postage Reports
DropshipIT
Postage Accounting
Palletization
PostalOne! Web Services
FAST
-----
Environment Information:
OPERATING SYSTEM
6.1 Service Pack 1 build: 7601
PATH NAMES
DAT-MAIL Program Path: C:\WB\MDV
DAT-MAIL Data Path: C:\WB\MDV\DATA\
Statements Data Path: C:\WB\PMW\DATA
Control Settings: C:\WB\MDV\DATA\mdbmdc.ini
PM Control Settings: C:\WB\PMW\DATA\pmws.ini
Weight Sheet Settings: C:\WB\PMW\DATA\pmwmts.ini
Tag Printing Settings: C:\WB\MDV>tagcontrol.ini
Default Import Path: C:\WB\mail.dat
Default Archive Path: C:\WB\mail.dat\archive
Daemon Inbox Path: C:\WB\mail.dat\incoming
windows temp folder: C:\users\lburish\AppData\Local\Temp\
PSQL engines: client 11.30, workgroup 11.30
Is Citrix Active: False
Is Terminal Server Active: False
Is Virtual Machine Active: False
```

- With the appropriate Client's worksheet displayed on the Installer's PC, place the cursor on the first, yellow highlighted field of the 'DATMAIL Version Info & Installation Folders' section;



- Using the PC's keyboard, hold down the 'Ctrl' key and simultaneously press the 'V' key to paste the copied information from the .txt file into the Client's worksheet. The copied information will display. Confirm that it is the same information that is located in the .txt file;



10. This next step (Step 10) is only required if the installation is for multiple users (network installation). If the install is a single instance type, proceed to Step 13. If the installation is for a single install, the data required for these Path Name fields (InstallAware and DAT-MAIL) will auto-populate in the Client worksheet when an 'X' is placed in the appropriate Single Install field:

Installation Type		InstallAware		DATMAIL Version Info & Installation Folders
Single	Network	Item	Path	
C:\	X		Program Path: C:\WB\MDV Data Path: C:\WB\MDV\DATA\ Statements Data Path: C:\WB\PMW\DATA Net Bookshelf Path: C:\WB	DAT-MAIL Editor with Toolbox 8.14.01.06 Compiled 1/11/14 PATH NAMES (copy Program Path to Daemon Inbox Path directly below this line) DAT-MAIL Program Path: C:\WB\MDV DAT-MAIL Data Path: C:\WB\MDV\DATA\ Statements Data Path: C:\WB\PMW\DATA Control Settings: C:\WB\MDV\DATA\mdbmdc.ini PM Control Settings: C:\WB\PMW\DATA\pmwms.ini Weight Sheet Settings: C:\WB\PMW\DATA\pmwvws.ini Tag Printing Settings: C:\WB\MDV\tagcontrol.ini Default Import Path: C:\WB\mail.dat Default Archive Path: C:\WB\mail.dat\archive Daemon Inbox Path: C:\WB\mail.dat\incoming SQL Connection Info: Copy SQL Connection info "HERE"
D:\			<p>**NOTE** <i>InstallAware path defaults should always be used for Single User Installations. Default paths should NOT be changed!</i></p> <p><i>Entering an 'X' next to the drive letter (C:\ or D:\) the installation took place on for a Single Installation Type will auto-populate the InstallAware Path information, as well as the DAT-MAIL Path Name Information.</i></p>	

For multiple user or network installations, from the .txt file, highlight the required path name information to be copied into the Client's worksheet. With the path names highlighted click the 'Edit' menu from the top-line menu bar and select the 'Copy' menu option (or using the PC's keyboard, while holding down the 'Ctrl' key, press the letter 'C');

```
DatMailAboutExport - Notepad
File Edit Format View Help
-----
DAT-MAIL Editor with Toolbox 8.14.01.06 Compiled 1/11/14
-----
Database Version Information:
USPS Drop Ship Database files as of: 12/27/2013
Destination File - Expires: 2/28/2014
DS files are not in sync with current version
Zip File - Expires: 2/28/2014, version: 000.00.00
Labeling List File - Expires: 4/30/2014, version: 075.01.00
WBLL files are not in sync with current version
-----
Registered Options:
Maximum simultaneous users allowed: 2

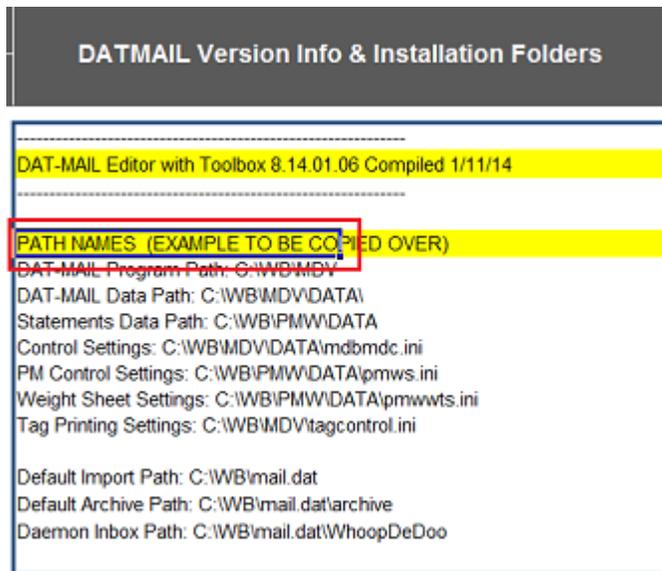
Security
Spoilage Tracking
Postage Reports
DropShipIT
Postage Accounting
Palletization
Postalone! web services
FAST
-----
Environment Information:
OPERATING SYSTEM
6.1 Service Pack 1 Build: 7601

PATH NAMES
DAT-MAIL Program Path: C:\WB\MDV
DAT-MAIL Data Path: C:\WB\MDV\DATA
Statements data Path: C:\WB\PMW\DATA
Control Settings: C:\WB\MDV\DATA\mdbmdc.ini
PM Control Settings: C:\WB\PMW\DATA\pmws.ini
Weight Sheet Settings: C:\WB\PMW\DATA\pmwmts.ini
Tag Printing Settings: C:\WB\MDV\tagcontrol.ini

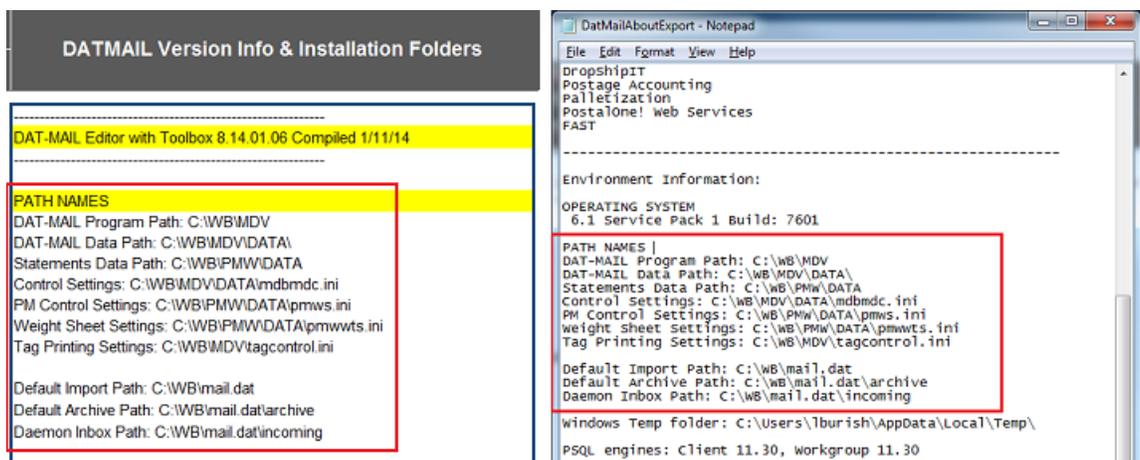
Default Import Path: C:\WB\mail.dat
Default Archive Path: C:\WB\mail.dat\archive
Daemon Inbox Path: C:\WB\mail.dat\incoming

Windows Temp folder: C:\Users\lburish\AppData\Local\Temp\
```

11. Display the Client worksheet. Place the cursor in the first or left-most field of the second highlighted line containing the text, "PATH NAMES (EXAMPLE TO BE...)";



- Using the PC's keyboard, hold down the 'Ctrl' key and simultaneously press the 'V' key to paste the copied information from the .txt file into the Client's worksheet. The copied information will display. Confirm that it is the same information that is located in the .txt file;



Note: The screen shots used above are for demonstration purposes only. They depict an install directory of 'C:\', which would not be the case for a multiple user or network installation.

- And lastly, from the .txt file, highlight the SQL connection confirmation located at the bottom of the .txt file to be copied into the Client's worksheet. With the SQL connection confirmation line highlighted, click the 'Edit' menu from the top-line menu bar and select the 'Copy' menu option (or using the PC's keyboard, while holding down the 'Ctrl' key, press the letter 'C');

```

DatMailAboutExport - Notepad
File Edit Format View Help
Postage Reports
DropShipIT
Postage Accounting
Palletization
PostalOne! web Services
FAST
-----
Environment Information:
OPERATING SYSTEM
6.1 Service Pack 1 Build: 7601

PATH NAMES
DAT-MAIL Program Path: C:\WB\MDV
DAT-MAIL Data Path: C:\WB\MDV\DATA\
Statements Data Path: C:\WB\PMW\DATA
Control Settings: C:\WB\MDV\DATA\mdbmdc.ini
PM Control Settings: C:\WB\PMW\DATA\pmws.ini
Weight Sheet Settings: C:\WB\PMW\DATA\pmwvts.ini
Tag Printing Settings: C:\WB\MDV\tagcontrol.ini

Default Import Path: C:\WB\mail.dat
Default Archive Path: C:\WB\mail.dat\archive
Daemon Inbox Path: C:\WB\mail.dat\incoming

Windows Temp folder: C:\Users\lburish\AppData\Local\Temp\

PSQL engines: Client 11.30, workgroup 11.30

Is Citrix Active: False
Is Terminal Server Active: False
Is Virtual Machine Active: False

PM Data Layer
pmdat707.dll ver. 8.0.17.1
pmdatap707.dll ver. 8.0.17.1
pmdataprootlib707.dll ver. 8.0.17.1
pminta707.dll ver. 8.0.17.1
pmintap707.dll ver. 8.0.17.1

Computer ID: REMLBURISHW764
User ID: lburish
-----
SQL connection info:
Successful connection to server REMLBURISHW764\SQLEXPRESS

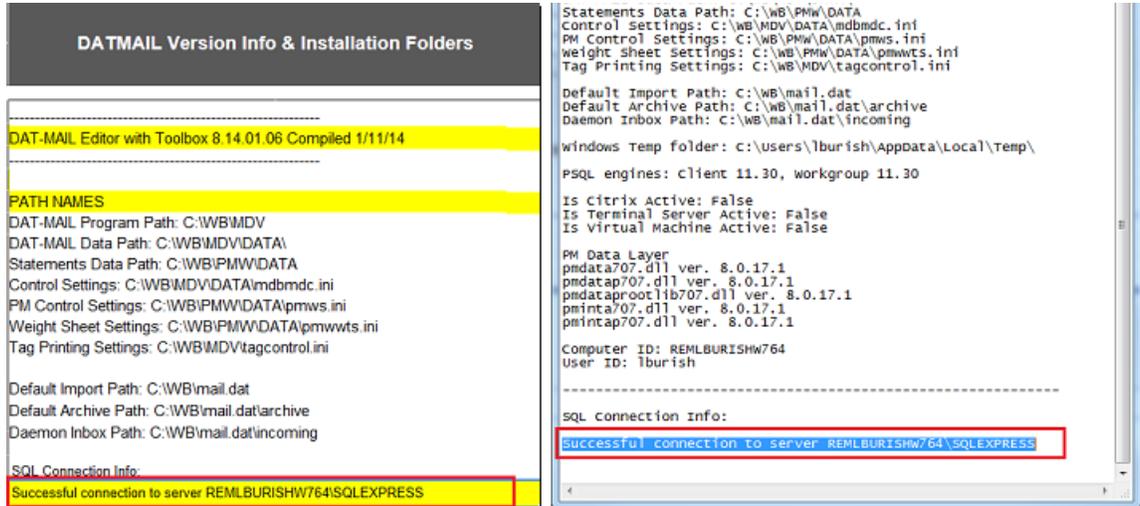
```

14. Display the Client worksheet. Place the cursor in the first or left-most field of the last, highlighted line containing the text, "Copy SQL Connection Info HERE";

DATMAIL Version Info & Installation Folders

Copy DAT-MAIL Version Info & Compilation Date HERE
PATH NAMES (EXAMPLE TO BE COPIED OVER)
DAT-MAIL Program Path: C:\WB\MDV DAT-MAIL Data Path: C:\WB\MDV\DATA\ Statements Data Path: C:\WB\PMW\DATA Control Settings: C:\WB\MDV\DATA\mdbmdc.ini PM Control Settings: C:\WB\PMW\DATA\pmws.ini Weight Sheet Settings: C:\WB\PMW\DATA\pmwvts.ini Tag Printing Settings: C:\WB\MDV\tagcontrol.ini
Default Import Path: C:\WB\mail.dat Default Archive Path: C:\WB\mail.dat\archive Daemon Inbox Path: C:\WB\mail.dat\WhoopDeDoo
SQL Connection Info: Copy SQL Connection info HERE

15. Using the PC's keyboard, hold down the 'Ctrl' key and simultaneously press the 'V' key to paste the copied information from the .txt file into the Client's worksheet. The copied information will display. Confirm that it is the same information that is located in the .txt file.

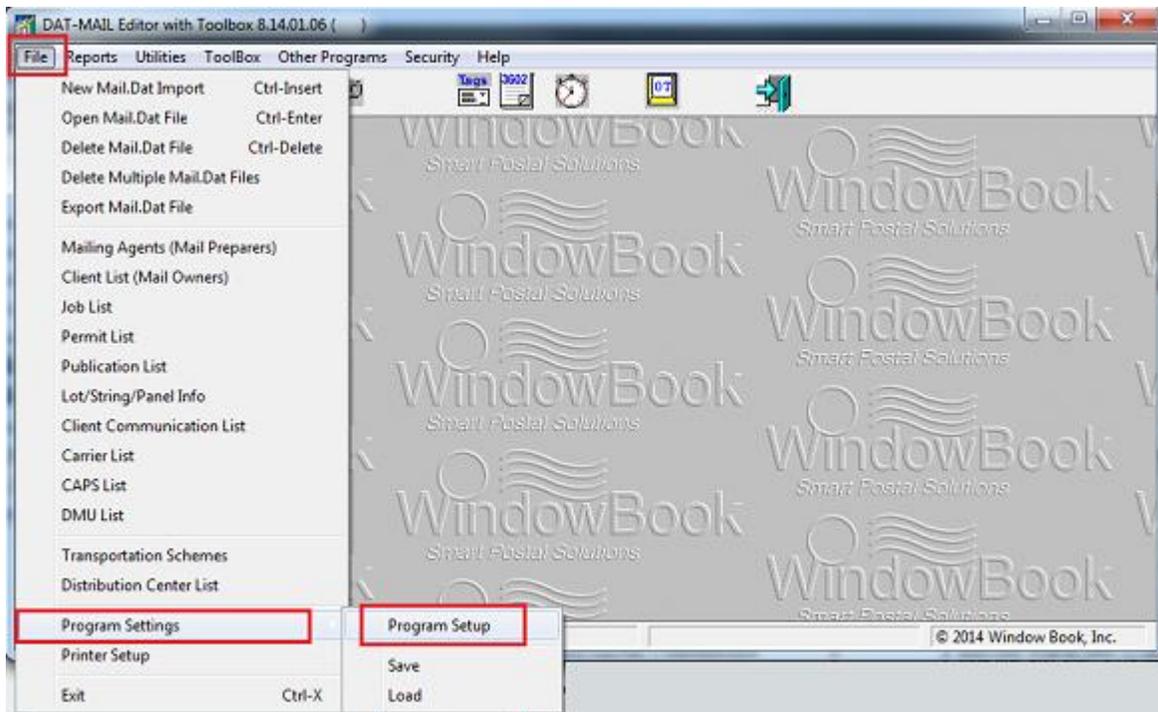


- **Installation Notes:** Located to the right of the 'DATMAIL Version Info & Installation Folders' field, this is a free-text field that can be used by the installer to record any pertinent information about the install, client, environment, etc. If updates to the Client worksheet should occur after it has been created (i.e. the Client requires a re-installation and decides to change one of their installation settings, the Client worksheet should be updated accordingly, and the 'Installation Notes' field should be updated to include what changes were made, who made them, and when.

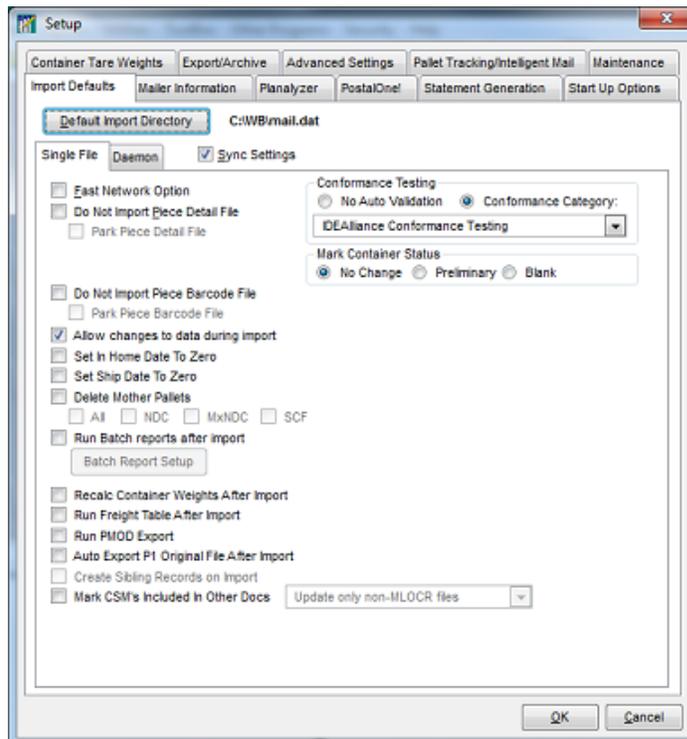
The remaining portion of the Client worksheet involves the importing of DAT-MAIL's and PostalOne! system setup screen shots after the installation has taken place.

- **DAT-MAIL Configuration Screen Shots:**

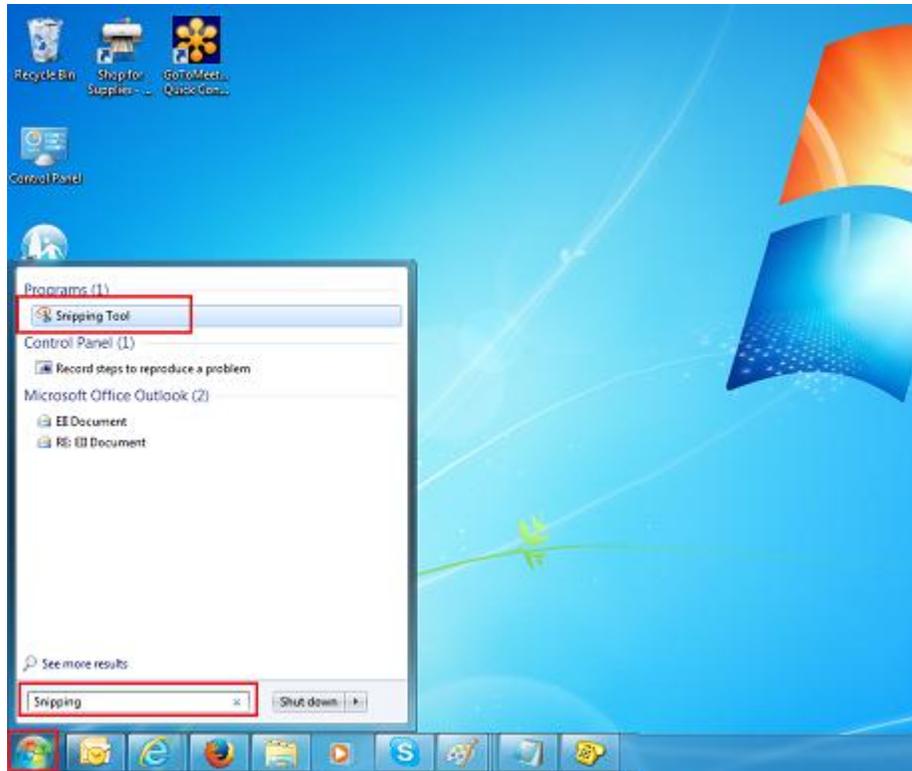
- **Imports Default Tab:** To display the tab, obtain a screen shot, and import that screen shot into the Client's worksheet, perform the following:
 1. Using GoToMeeting, launch the newly installed DAT-MAIL on the Client's PC/Server;
 2. From the top-line menu bar, select 'File', 'Program Settings', and 'Program Setup';



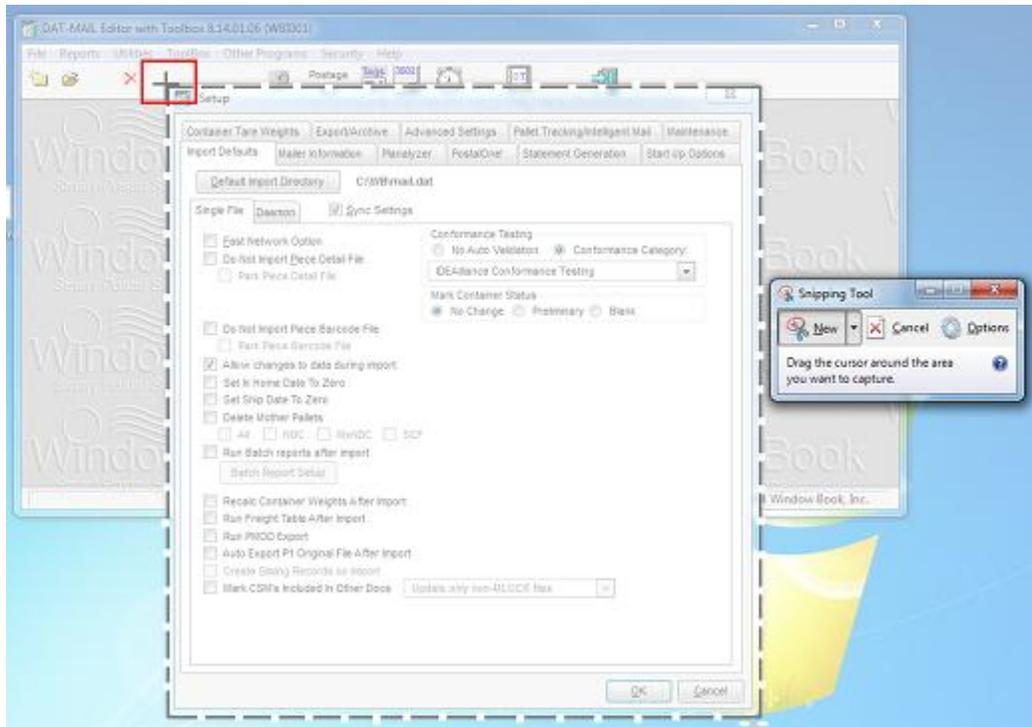
3. DAT-MAIL's *Setup* dialog will display. The *Setup* dialog is comprised of various tabs. When the *Setup* dialog is launched, the default tab to display is the Import Defaults tab, which is the first screen shot required for the Client worksheet;



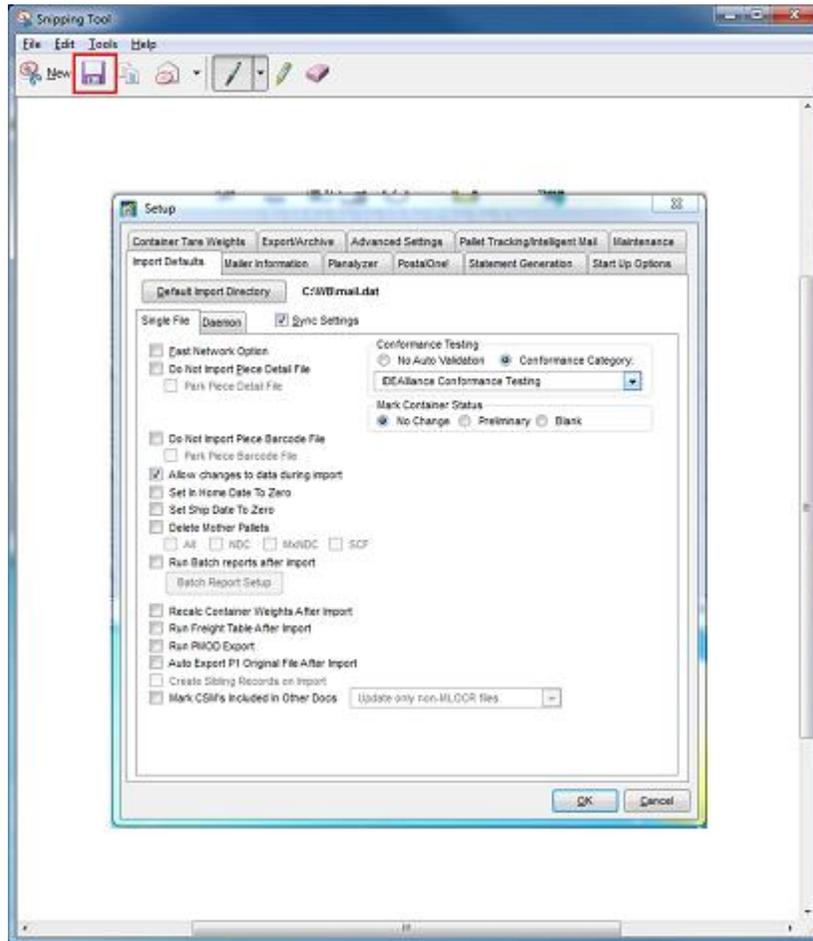
4. From the Installer's PC, launch the MS Snipping Tool by clicking 'Start' and then typing "Snipping" in the Search field. Select the Snipping Tool from the search results;



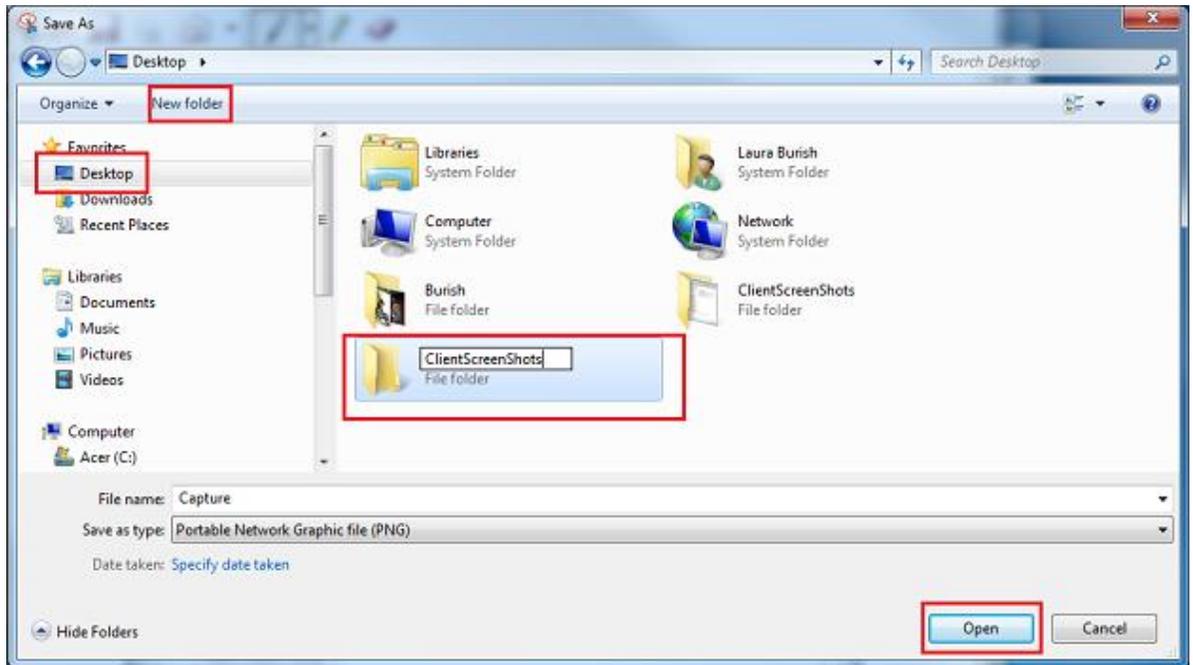
5. Using the Snipping Tool from the Installer's PC, click and drag the cursor around the image of the Client's DAT-MAIL *Setup* screen (Import Defaults tab) viewable in GoToMeeting;



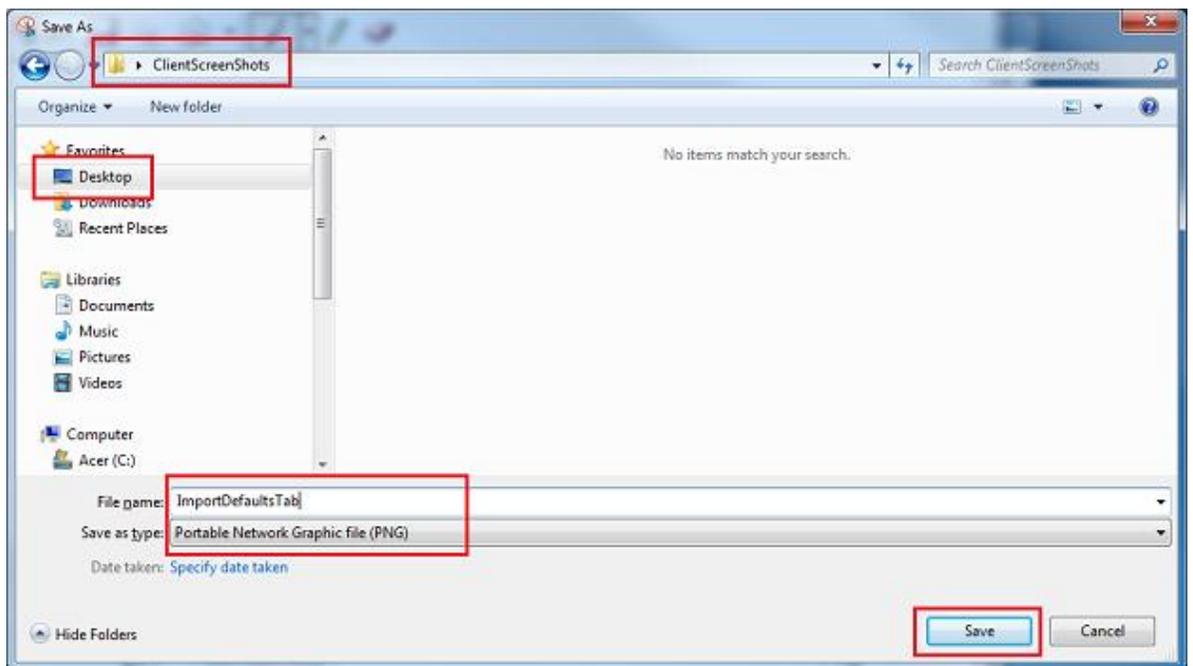
- When you let go of the cursor, the Snipping Tool will display the image of what you highlighted. Click the Save icon in the top left corner;



7. A Save As dialog will display. Create a folder on the Installer's Desktop and name it something meaningful (e.g. "ClientScreenShots"). Click the **Open** button when finished;



8. Name the image (e.g. "ImportDefaultsTab") and save the image as a .png file. Click the **Save** button when finished;



- Display the Client worksheet. Place the cursor where you would like to import the ImpotDefaultsTab.png image - directly below the label "Import Defaults Tab";

The screenshot shows an Excel spreadsheet with the following content:

EII Client Installation Information		Install Date	Installation Type		InstallAware	
Client Name / Client ID	Rocky Mountain (ME2011)	2014-Feb-14	Single	Network	Item	Path
Address	6722 E 47th Avenue Drive, Denver, CO 80216		C:\	X		
Phone	(303) 227-0700		D:\			
Subscriber Name	Clark Hutchinson					
E-mail Address	clark@rockymountainmail.com					
Installed By (Company)	Window Book Inc					
	Engineering Innovation Inc (EII)					
Installed By (Individual Name)	Kristine Anderson					
Client Install Assistant						
PSQL License Code						

InstallAware Paths:
 Program Path: C:\WB\IMDV
 Data Path: C:\WB\IMDV\DATA
 Statements Data Path: C:\WB\PMW\DATA
 Net Bookshelf Path: C:\WB

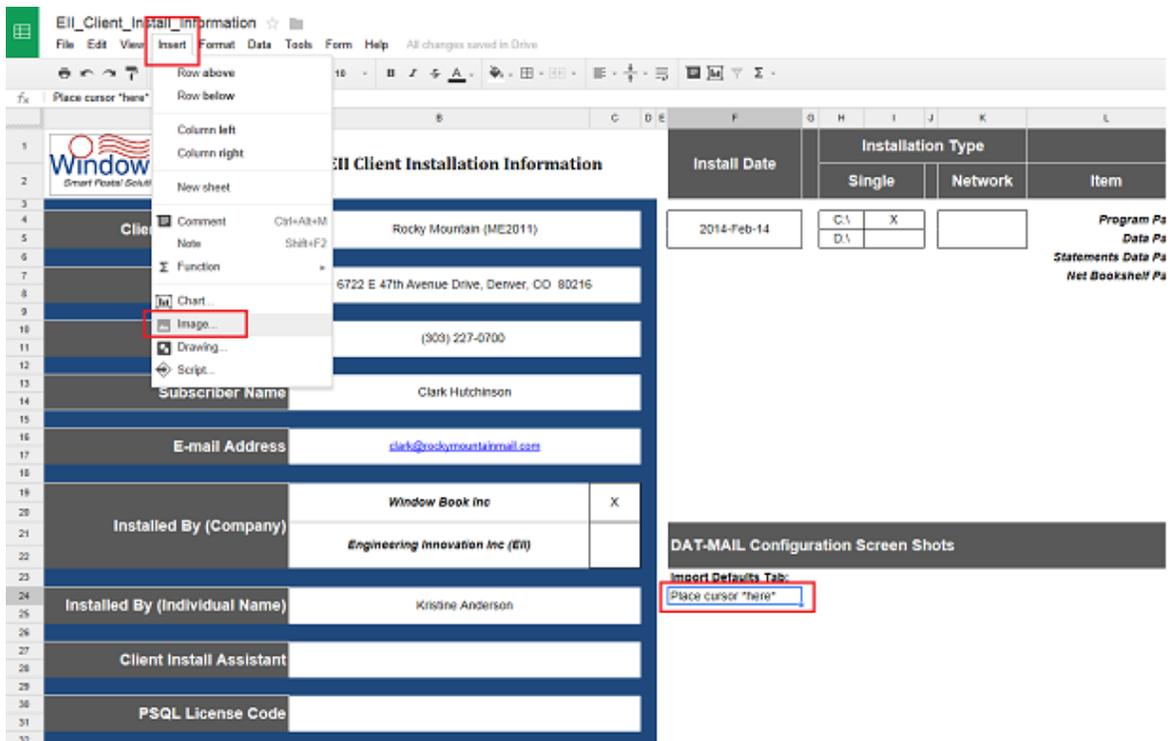
NOTE:
 InstallAware path defaults should always be used for Single User Installations. Default paths should NOT be changed!
 Entering an 'X' next to the drive letter (C:\ or D:\) the installation took place on for a Single Installation Type will auto-populate the InstallAware Path information, as well as the DAT-MAIL Path Name information.

DAT-MAIL Configuration Screen Shots

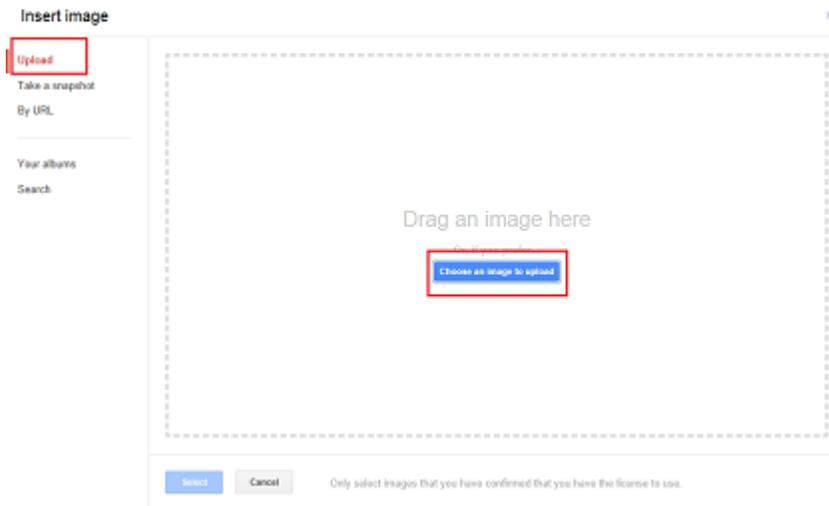
Import Defaults Tab:
 Place cursor here

Mailer Information Tab:
 Place cursor here

- From the top-line menu bar, select 'Insert' > 'Image'.



11. An *Insert Image* dialog will display. Click the **Choose image to upload** button located in the center of the dialog;



12. A *Choose File to Upload* dialog will display. Locate the 'ClientScreenShots' folder created on the computer's Desktop and select the file located in that folder to import (i.e. 'ImportDefaultsTab.png'). Click the **Open** button;



13. The image (*ImportDefaultsTab.png*) will display in the Client worksheet in the area reserved for the screen shot of the Import Defaults Tab;

Eli_Client_Install_Information

File Edit View Insert Format Data Tools Form Help All changes saved in Drive

Place cursor "here"

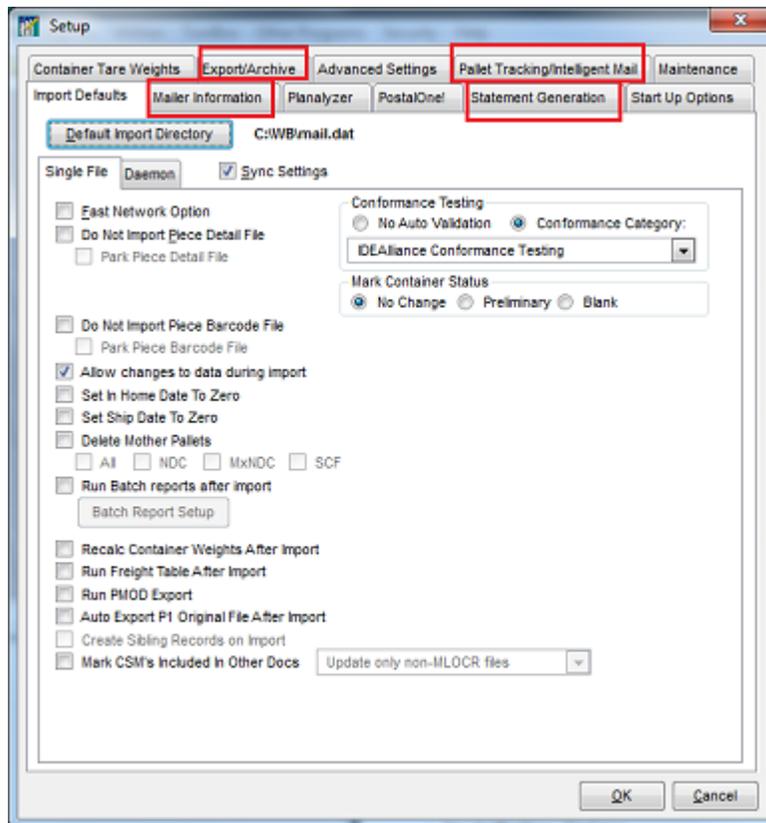
Eli Client Installation Information		Install Date	Installation Type		Inst
			Single	Network	Item
Client Name / Client ID	Rocky Mountain (ME2011)	2014-Feb-14	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Address	6722 E 47th Avenue Drive, Denver, CO 80216		<input type="checkbox"/>	<input type="checkbox"/>	
Phone	(303) 227-0700				
Subscriber Name	Clark Hutchinson				
E-mail Address	clark@rockymountainmail.com				
Installed By (Company)	Window Book Inc				
	Engineering Innovation Inc (EII)				
Installed By (Individual Name)	Kristine Anderson				
Client Install Assistant					
PSQL License Code					
DATMAIL Registration Code	ME20115JZFQ8G+52B1PRG+MD2CHTQKWQRMGBZ				

DAT-MAIL Configuration Screen Shots

Import Defaults Tab:

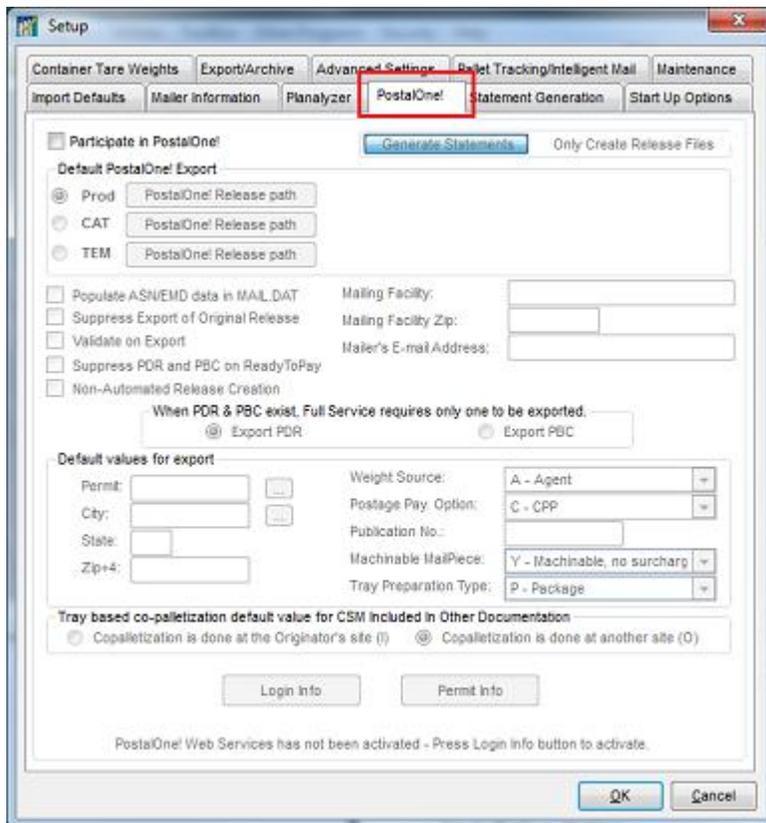
Place cursor "here"

14. Perform the same procedure for the remaining four DAT-MAIL configuration screen shots, saving all of the .png files in the same 'ClientScreenShots' folder located on the Installer's Desktop:



- **Mailer Information Tab**
- **Statement Generation Tab**
- **Export/Archive Tab**
- **Pallet Tracking/Intelligent Mail Tab**

- **PostalOne! Release Path:** Perform the same procedure for importing the PostalOne! Release Path screen shot into the Client worksheet that was performed for the DAT-MAIL Configuration Screen Shots.



The creation and completion of the Client worksheet is complete! Log out of Google Docs.