

# MANAGING PRODUCT NOTIFICATIONS

This Guide is intended to identify the various e-mail notification options available in Window Book products, what service is used to send them, and where they originate so as to be able to manage the e-mail addresses of the people who receive them.



Many of the notification functions provide the ability to send notifications via SMS Text Messaging as well as via e-mail. For the purpose of this Guide; however, only the management of notifications via e-mail is discussed.

## REQUIREMENTS

The proper administrative rights are required for modifying the e-mail address or addresses used for the various notification options found in Window Book's products. Contact your local IT representative for assistance.

## WHITE LISTING

There are specific e-mail addresses that Window Book uses that a Client should make sure are 'white listed' on their server. E-mail addresses that are white listed are considered to be spam free. White lists over-ride any blacklists and spam filters to help ensure delivery of the e-mail to the intended recipient.

Below are the e-mail addresses that should be white listed. They are current as of February 2017. To view the most current list of the Window Book e-mail addresses that should be white listed, click the following link: http://www.windowbook.com/home/White-List-Help.

- wbiadmin@windowbook.com;
- Schedulerservice@windowbook.com;
- scheduler@windowbook.com;
- bounce@infusionsoft.com;
- techsupport@windowbook.com;
- mailer@infusionsoft.com; and
- postalspecialist@windowbook.com.



# **NOTIFICATIONS**

The notification functions for Window Book's products (e.g. DAT-MAIL™, eDM10X™, etc.) originate from the Window Book Automation Scheduler™ and a corresponding plug-in; MailDrop™ Engine, and/or PostalWeb®.

Window Book utilizes two service options available for sending the notifications: SMTP; and PostalWeb E-Mail Service (i.e. AWS); both are available for some of the notification options, while others use only one or the other.

On the next page is a reference table for identifying the various notification options Window Book offers, where the setup of each notification can be found, and which e-mail service options they can be set up to use.

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| Source               | Source Location      | Used For¹                         | Name of Screen  | SMTP         | PostalWeb E-<br>Mail Service<br>(AWS) |
|----------------------|----------------------|-----------------------------------|---|--------------|---------------------------------------|
| IM Scan Manager      | Automation Scheduler | DAT-MAIL                          | "Notification"  | $\checkmark$ |                                       |
| Mail.dat Merger*     | Automation Scheduler | DAT-MAIL*                         | AT-MAIL* "Notification"                                   |              |                                       |
| Mail.dat Splitter*   | Automation Scheduler | DAT-MAIL*                         | "Notification"  | <b>V</b>     |                                       |
| MDSM <sup>2</sup>    | Automation Scheduler | MDSM plug-in                      | "MDSM Status Notification"                                | ✔            | ✔                                     |
| MDSM                 | Automation Scheduler | eDM10X (Job Receipt & Log Events) | "Notification Settings" and<br>"Event Distribution Lists" | ✔            | *                                     |
| MDSM Service Monitor | Automation Scheduler | USPS MDR Client™                  | "Notification"  | ✔            | <b>√</b>                              |
| TMS Manager          | Automation Scheduler | DAT-MAIL                          | "Notification"  | ✔            |                                       |
| <u>Notification</u>  | MailDrop Engine      | DAT-MAIL and eDM10X               | "Summary Report"  |              | €                                     |
| <u>Notification</u>  | MailDrop Engine      | DAT-MAIL and eDM10X               | "MDR Client Version is out of date"                       |              | ₹                                     |
| <u>Notification</u>  | MailDrop Engine      | DAT-MAIL and eDM10X               | "MDR Client version was updated"                          |              | ₹                                     |
| Notification         | MailDrop Engine      | DAT-MAIL and eDM10X               | "Statistic Report"  |              | *                                     |

<sup>&</sup>lt;sup>1</sup> Where noted with an asterisk (\*), these plug-ins can be used with DAT-MAIL or any post pre-sort software.

<sup>&</sup>lt;sup>2</sup> All "MDSM" Source notifications have been replaced by notifications generated from within MailDrop Engine (Jan. 2017).



| Source              | Source Location | Used For¹           | Name of Screen                      | SMTP | PostalWeb E-<br>Mail Service<br>(AWS) |
|---------------------|-----------------|---------------------|-------------------------------------|------|---------------------------------------|
| Notification        | MailDrop Engine | eDM10X              | "Submission was QuickFixed"         |      | <b>√</b>                              |
| Events Notification | MailDrop Engine | DAT-MAIL and eDM10X | "Passed/Failed Receipt<br>Events"   |      | ∢                                     |
| Events Notification | MailDrop Engine | DAT-MAIL and eDM10X | "Logged Events"                     |      | *                                     |
| Events Notification | MailDrop Engine | DAT-MAIL and eDM10X | "Receipt Warnings<br>Notifications" |      | ✓                                     |
| <u>PostalWeb</u>    | PostalWeb       | PostalWeb           | "Company" and "Member<br>Profile"   |      | *                                     |

- Detailed information for the notification options found in the Automation Scheduler's plug-ins can be found in the "Automation Scheduler System Guide", which is available on the Window Book web site at: <a href="https://www.windowbook.com/Support/UserGuides">https://www.windowbook.com/Support/UserGuides</a>. Registration and/or login is required.
- Detailed information for the notification options found in MailDrop Engine can be found in the "MailDrop Engine Installation & User Guide", which is available on the Window Book web site at: <a href="https://www.windowbook.com/Support/UserGuides">https://www.windowbook.com/Support/UserGuides</a>. Registration and/or login is required.
- Detailed information about PostalWeb notifications and e-mail address management can be found in the "PostalWeb User Guide", which is available on the Window Book web sie at: <a href="https://www.windowbook.com/Support/UserGuides">https://www.windowbook.com/Support/UserGuides</a>. Registration and/or login is required.



## **DESCRIPTION**

This section contains a brief description of each notification's source and what the corresponding notification is intended for. It is organized by those notifications found within the Automation Scheduler plug-ins, and then those that are PostalWeb-based (the order follows the table on the previous page).

## **Automation Scheduler Plug-ins**



Detailed information for the notification options found in the Automation Scheduler's plug-ins can be found in the "Automation Scheduler System Guide", which is available on the Window Book web site at: <a href="https://www.windowbook.com/Support/UserGuides">https://www.windowbook.com/Support/UserGuides</a>. Registration is required.



Before making any modifications to any of the plug-ins, it is always important to STOP the Automation Scheduler's service, and then START the service after the modifications are complete.

## IM SCAN MANAGER (SMTP ONLY)

The IM Scan Manager plug-in is used to mark already imported files containing Intelligent Mail Piece Barcodes into a SQL Server database as spoiled. This data can then be used in Window Book products for such purposes as the Spoilage Tracking module in DAT-MAIL.

E-mail notifications will be sent when the plug-in runs and the process completes without encountering errors (i.e. 'Send on success') or when the plug-in encounters an error(s) and the process does not complete (i.e. 'Send on failure').



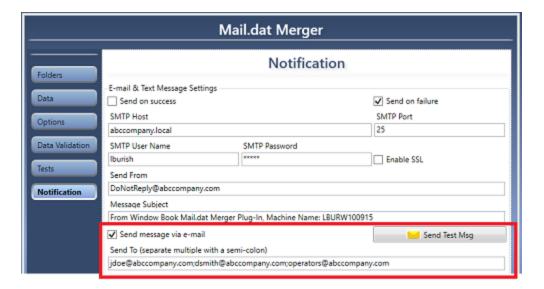


## MAIL.DAT MERGER (SMTP ONLY)

The Mail.dat Merger plug-in is used to run the 'wbMDMgr.exe' program which imports multiple Mail.dat file sets into an MS SQL Server database, merge them into a single data file set, and then export them to a single Mail.dat file. The exported Mail.dat file can then be imported by DAT-MAIL or any other post-presort software.

The plug-in also allows the Client to configure the pre-process merging of the Client's files before they are imported into DAT-MAIL.

E-mail notifications will be sent when the plug-in runs and the process completes without encountering errors (i.e. 'Send on success') or when the plug-in encounters an error(s) and the process does not complete (i.e. 'Send on failure').



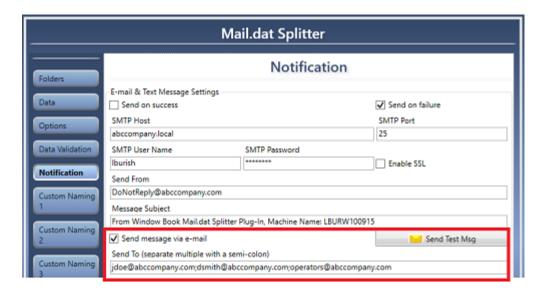


## MAIL.DAT SPLITTER (SMTP ONLY)

The Mail.dat Splitter plug-in is used to run the 'wbMDMgr.exe' program which imports Mail.dat files into an MS SQL Server database, which can then be split into multiple Mail.dat file sets according to specified criteria and exported for use. The exported Mail.dat file sets can then be imported by DAT-MAIL or any other post-presort software.

The plug-in also allows the Client to configure the pre-process splitting of the Client's Mail.dat files before they are imported into DAT-MAIL.

E-mail notifications will be sent when the plug-in runs and the process completes without encountering errors (i.e. 'Send on success') or when the plug-in encounters an error(s) and the process does not complete (i.e. 'Send on failure').



## MDSM (SMTP & AWS)

The MDSM plug-in contains three notification options that can be sent via e-mail using SMTP or PostalWeb E-Mail service (i.e. AWS).

## **MDSM Status Notification**

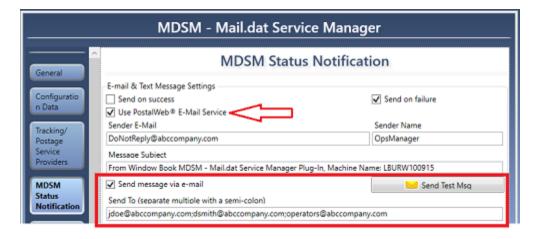
The MDSM Status Notification screen gives the user the option to setup notifications with regards to the status of USPS MDR Client software (not job status). Any time a system status error is encountered with the USPS MDR Client, a user (or group of users) can be notified of the issue in order to rectify it.



E-mail notifications will be sent when the plug-in runs and the process completes without encountering errors (i.e. 'Send on success') or when the plug-in encounters an error(s) and the process does not complete (i.e. 'Send on failure').



Window Book recommends enabling <u>only</u> the 'Send on failure' option in order to eliminate the number of unnecessary and unwanted messages that will occur if 'Send on Success' is enabled.



## **Receipt & Log Events**

The Receipt and Log Event Notifications allows users to send notifications pertaining to the status of jobs that have been submitted to *PostalOne!*. Enabling this notification function (and selecting what type of service it uses, i.e. SMTP or PostalWeb E-mail Service (AWS)) occurs within the *Notification Settings* screen.





E-mail recipients of both notifications are managed in the MDSM plug-in's *Event Distribution Lists* screen where distribution lists are created that contain one or more members (i.e. e-mail addresses).



The notifications are triggered by Receipt and/or Log files received from PostalOne! during the submission and validation process.

## **MDSM SERVICE MONITOR (SMTP & AWS)**

The MDSM Service Monitor plug-in in used to monitor the operation of the MDSM plug-in. E-mail notifications will be sent when the plug-in runs and the process completes without encountering errors (i.e. 'Send on success') or when the plug-in encounters an error(s) and the process does not complete (i.e. 'Send on failure').



Window Book recommends enabling <u>only</u> the 'Send on failure' option in order to eliminate the number of unnecessary and unwanted messages that will occur if 'Send on Success' is enabled.

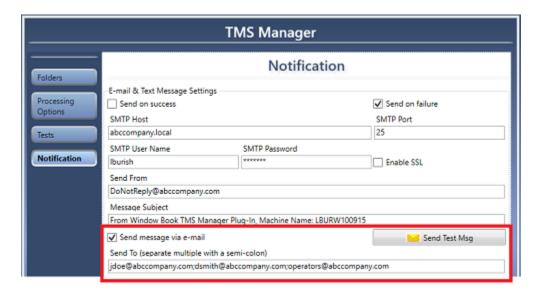




## TMS MANAGER (SMTP ONLY)

The TMS Manager plug-in is used to run the 'wbTMSMgr' executable which imports Tray Management System (TMS) tray and pallet scan data into Window Book's 'wbDB' SQL Server database. It allows the Client to configure the handling of their physical tray and pallet scan data from their WB Scan or Carter Controls TMS.

E-mail notifications will be sent when the plug-in runs and the process completes without encountering errors (i.e. 'Send on success') or when the plug-in encounters an error(s) and the process does not complete (i.e. 'Send on failure').



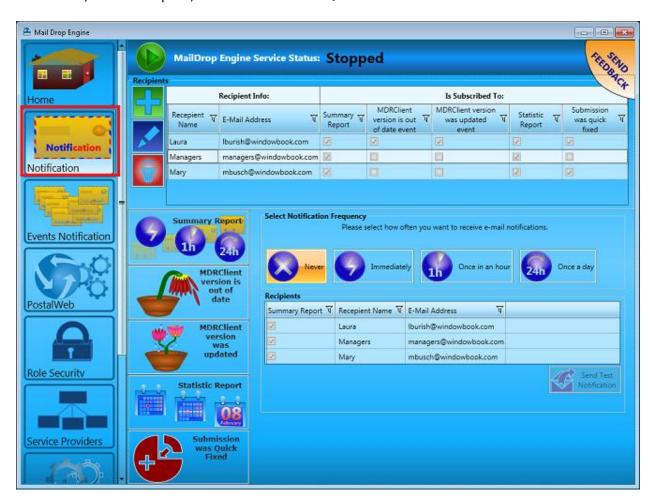


## **MailDrop Engine (AWS Only)**

MailDrop Engine provides two separate notification features: Notification; and Events Notification.

### **NOTIFICATION**

The Notification feature in MailDrop Engine (MDE) provides the following notifications/reports: 'Summary Report'; 'MDR Client is out of date' notification; 'MDR Client version was updated' notification; 'Statistic Report'; and 'Submission was QuickFixed' notification.





## **Summary Report**



This report contains summary information about the job handling process performed by an MDR Client configuration (i.e. PROD, TEM, PREPROD, and CAT). The summary information pertains to all jobs currently being processed (i.e. the latest job status, including log event, receipt, and result statuses).

## Example:

From: wbiadmin@windowbook.com [mailto:wbiadmin@windowbook.com]

Sent: Wednesday, February 1, 2017 12:29 PM
To: Rob Dorre <<u>rdorre@windowbook.com</u>>
Subject: Submissions summary report

## MailDrop Submissions Summary Report

Period: From 2/1/2017 11:20:22 AM until Now

#### USPS Site TEM

| Mail.Dat<br>File Name | HDR Job<br>ID | HDR Job<br>Name | Logged<br>Event             | P1 Release<br>Status         | Status Message   |
|-----------------------|---------------|-----------------|-----------------------------|------------------------------|--|
| RPD12187              | 00003640      | 00004725        | Failed Client<br>Validation | Error – Failed<br>Validation | The .mpa Payment Account Number is not valid for the .mpa Permit<br>Number, .mpa Permit ZIP +4, and permit type; when populated, the .mpa<br>Payment Account Number must reference an active Account Number th |
| RPD12188              | 00003642      | 00004725        | Rejected                    | Error – Job<br>Rejected      | Your account does not have access to eDoc Sender CRID: 12345678  |
| RPD12189              | 00003641      | 200000<br>PICES | Failed Client<br>Validation | Error – Failed<br>Validation | The .mpa Payment Account Number is not valid for the .mpa Permit<br>Number, .mpa Permit ZIP +4, and permit type; when populated, the .mpa<br>Payment Account Number must reference an active Account Number th |

This email is never sent without permission.

You are receiving this e-mail because this e-mail address has been added to the 'Notification' function, which is a feature of your MailDrop Engine software.

http://www.windowbook.com

The frequency in which the notifications occur can be set to occur **Never** (default), **Immediately** (as soon as a process update occurs), **Once in an hour**, or **Once a day**.



## **MDR Client Is Out Of Date**



This notification communicates that the current MDR Client is out of date (i.e. is not supported), which could slow down operations.

### Example:

From: wbiadmin@windowbook.com [mailto:wbiadmin@windowbook.com]

Sent: Wednesday, February 1, 2017 11:33 AM

To: Rob Dorre < rdorre@windowbook.com >

Subject: TEM MDRClient version 40.0.0.0' is not supported.

## 'TEM' MDRClient version ' 43.0.0.0' is not supported.

MailDrop Engine service will download the latest version shortly.

This email is never sent without permission.

You are receiving this e-mail because this e-mail address has been added to the 'Notification' function (MDRClient version is out of date event), which is a feature of your MailDrop Engine software.

http://www.windowbook.com

## **MDR Client Version Was Updated**



This notification communicates that an out-of-date MDR Client – the MDR Client that was no longer supported – has been updated.

### Example:

From: wbiadmin@windowbook.com [mailto:wbiadmin@windowbook.com]

Sent: Wednesday, February 1, 2017 11:30 AM
To: Rob Dorre <rdorre@windowbook.com>

Subject: TEM MDRClient was updated to version '45.0.1.0\_TEM'

### 'TEM' MDRClient was updated to version ' 45.0.1.0 TEM'

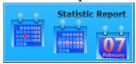
This email is never sent without permission.

You are receiving this e-mail because this e-mail address has been added to the 'Notification' function (MDRClient version was updated event), which is a feature of your MailDrop Engine software.

http://www.windowbook.com

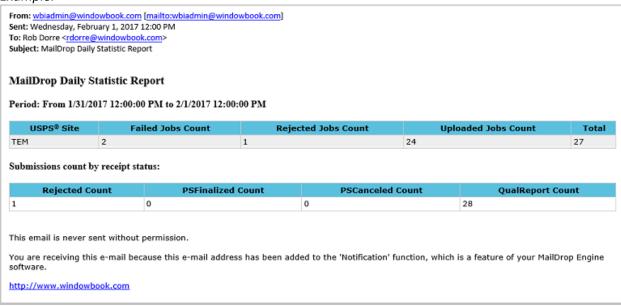


## **Statistic Report**



This report provides the counts for the different job states by USPS Site (i.e. Failed, Rejected, and Uploaded), and different submission states by Receipt Status (i.e. Rejected, PS Finalized, PS Canceled, and Qual Report generated), for each day.

## Example:



How often and when the report gets sent is determined by the Client. The frequency in which the report gets sent can be set to: **Never** (default);

- Once in a Day at: Using the drop down provided, the Client select a specific time the report should be sent;
- Once in a Week on: Using the drop downs provided, the Client can select what day of the week and at what time the report should be sent; and
- **Every Month at the**: The Client can specify what day of the month and at what time the report should be sent.



## Submission Was QuickFixed



This notification provides information about submissions that failed to reach *PostalOne!*, were 'fixed' using the eDM10X™ QuickFix feature, and then were resubmitted to *PostalOne!*. It also provides what 'fix' was made to each file or job.

## Example:

From: wbiadmin@windowbook.com [mailto:wbiadmin@windowbook.com]

Sent: Friday, February 3, 2017 4:53 PM
To: Rob Dorre <ru>
<rr>
rdorre@windowbook.com

Subject: RPD12191.zip file been fixed and re-submitted.

RPD12191.zip submissions has been fixed via QuickFix and re-submitted to PostalOne!® for USPS® Site TEM

Job Name: AAA Job ID: 00003643

Field Code Old Value New Value MPA-1127 123456

This email is never sent without permission.

You are receiving this e-mail because this e-mail address has been added to the 'Notification' function (QuickFixed), which is a feature of your MailDrop Engine software.

http://www.windowbook.com

Submission was QuickFixed notifications are sent to subscribed Recipients whenever the event occurs.



## **EVENTS NOTIFICATION**

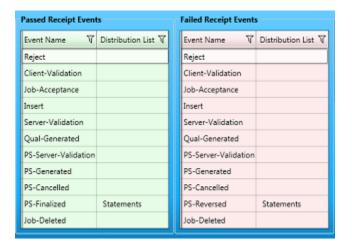
The Events Notification feature in MailDrop Engine (MDE) provides the following notifications: 'Passed' and 'Failed Receipt Events'; 'Logged Events'; and 'Receipt Warning Notifications'.



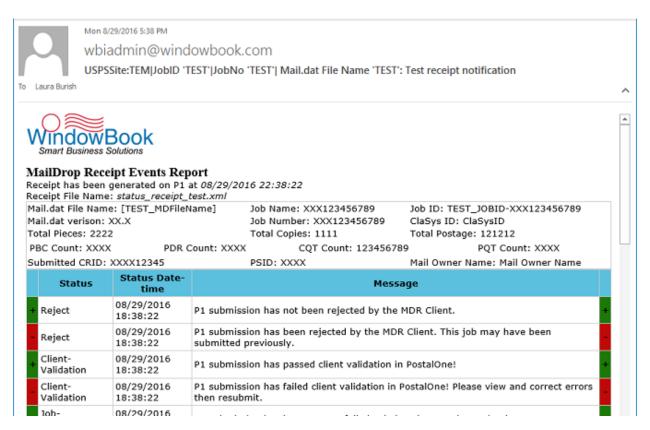


## **Passed and Failed Receipt Events**

These are notifications (i.e. e-mail messages) that are sent for submitted jobs based on specific receipt files containing an event value that corresponds with 'passed' or 'failed', which are generated by *PostalOne!* (P1) during the batch validation and upload process.



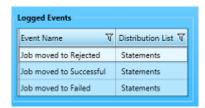
E-mail notifications will contain submission-specific header information so that the user can easily identify which submission or job the notification pertains to.





## **Logged Events**

These are notifications (i.e. e-mail messages) that are sent for submitted jobs based on important events identified by debug logs that are generated by the MDR Client.



Unlike Receipt Events, there are only three available Logged Events that notifications can be sent for:

- Job moved to Rejected Submission to P1 has been rejected;
- Job moved to Successful Submission was successfully uploaded to P1; and
- Job moved to Failed Submission to P1 failed due to MDR Client validation error(s).

The main differences between Logged Events and Receipt Events are:

- Logged Events are generated by the MDR Client and Receipt Events are generated by P1;
- Logs get created by the MDR Client sooner that P1 Receipt Events; therefore, Logged Event notifications will be sent more quickly;
- There are only three Logged Events that will trigger a notification, unlike Receipt Events which there are more of and which contain more detailed information for the mailer.

## **Receipt Warnings Notifications**

Intended for, but not limited to, mailers participating in Seamless Acceptance and E-Induction Mailings, these notifications provide information to mailers in the way of warnings that will not fail a job, but will negatively impact mailings, scorecards and other performance measurement criteria used by the USPS. Since these warnings do not cause a job to fail, mailers will not be made aware of these warnings using the MDE's Receipt and Logged Events Notification functions.





## PostalWeb (AWS Only)

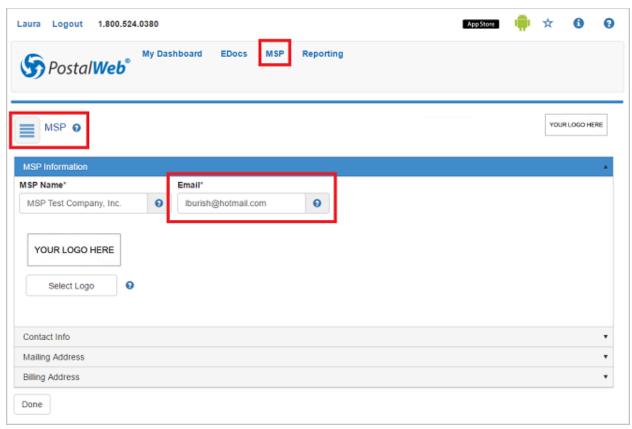


Detailed information about PostalWeb Notifications and EDocs Services; as well as e-mail address management can be found in the "PostalWeb for Mail Service Providers User Guide", which is available on the Window Book web site at: <a href="https://www.windowbook.com/Support/UserGuides">https://www.windowbook.com/Support/UserGuides</a>. Registration is required.

PostalWeb contains two different notification options: general system/software/industry notifications (i.e. 'Notifications'); and PostalWeb subscription services (i.e. 'EDocs'>'Services'), which are notifications generated by the availability of PostalOne statements. To receive these types of notifications requires the user to be subscribed to a specific EDocs Service (only the role of 'Administrator' can subscribe users to EDocs Services).

Both notification options are sent via AWS only. Notification options can be sent to:

• The site's primary e-mail address. The primary e-mail address is entered at the time a Client is first registering (creating) their PostalWeb site. It is used for various communication purposes, including (but not limited to) receipt of the confirmation e-mail to validate the address, system notifications, and first-time access to the newly registered PostalWeb site. The primary e-mail address is generally not used for EDocs Services; however, depending on the Client's needs, it can be. Making a change to this e-mail address requires a site role of 'Administrator' and can be done through the MSP screen; and/or





• Any registered user or member of a Client's PostalWeb site. Their personal e-mail address is stored in their 'Member Profile' (see image below). E-mail addresses can be modified by the individual user in their 'Member Profile'; however, e-mail addresses cannot actually be removed or deleted. Registered users of a Client's PostalWeb site (along with their e-mail addresses) can be made 'inactive' or 'active'. To do this requires a site role of 'Administrator' and/or 'Location Manager' (only for users that fall under his or her assigned Location), and is done through the *Manage Users* screen (not shown here).

