




WindowBook
Smart Business Solutions



For Mail Owners

User Guide

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REVISION HISTORY

This section contains a list of any significant changes that were made from the previously published version of this Guide, including a brief description of the change, the type of change made (i.e. Revision, New, or Deletion), a link to the location in the Guide where the change occurred, and any pertinent details relating to the change.

CHANGE	TYPE	LOCATION IN GUIDE	DETAIL
Publication	New	Document	New document intended to provide PostalWeb user instructions for mail owners.

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GETTING STARTED

SYMBOLS YOU SHOULD KNOW

The following symbols appear throughout this document:



Where displayed, this Information icon denotes important information regarding the subject matter at hand. The information is intended to provide helpful hints, references to other locations in the document to help further understanding about the current subject-matter, and/or include special requirements pertaining to specific subject-matter. It is important that the information provided be read and thoroughly understood before proceeding.



Where displayed, this Troubleshooting icon denotes helpful hints and tips for the subject matter at hand. The information in the troubleshooting tip is intended to provide resolutions for some of the more common issues that can occur during operation.



Where displayed, this Attention icon is intended to make the reader take special notice as the information provided is critical in nature to the subject matter at hand. It is not intended to lessen the importance of the information provided with the Information icon noted above; but to bring additional attention in situations of extreme necessity.

PURPOSE

The purpose of this User Guide is to provide information for mail owners on how to use PostalWeb®. This Guide assumes the following:

- The mail owner's client-specific PostalWeb site has already been created;
- If the mail owner uses a mail service provider, the mail service provider has registered with PostalWeb and created their own PostalWeb site;
- The mail owner has *PostalOne!*® credentials.



For instructions on how to create and configure a new, client-specific PostalWeb site, please refer to the “PostalWeb for Mail Owners Setup Guide”, which is available on Window Book’s web site at: <https://www.windowbook.com/Support/UserGuides>. Registration is required.

INTRODUCTION

PostalWeb is a new web-based service from Window Book that gives mail owners a unique view of *PostalOne!* submissions and automatic delivery of postage statements.

Using PostalWeb, mail owners can subscribe to or sign up for the automated delivery of finalized *PostalOne!* postage statements containing their underlying data in PDF and/or XML file formats. Both file types may be subscribed to; however, the use of the XML file type allows the mail owner to import these statement files into accounting applications.

SYSTEM REQUIREMENTS

SCREEN RESOLUTION

- Minimum 1280 x 800 or higher.

WINDOWS® REQUIREMENTS

- **Browser:** The latest versions of Internet Explorer®, Firefox®, Google Chrome™, or any modern browser available for supported operating systems, including the latest mobile browsers.

APPLE® MAC® REQUIREMENTS

- **Browser:** Latest versions of Chrome®, Firefox® or Safari® (including the mobile browser Safari iOS 8).



Users who wish to view PDF documents must have an appropriate PDF viewer installed on their computer and/or as a browser plug-in.

BECOMING A POSTALWEB USER

The following is a summary of the process of becoming a PostalWeb user. A detailed description of the process is located in the *PostalWeb for Mail Owners Setup Guide*, specifically the 'New User Sign-up' section.



The “PostalWeb for Mail Owners Setup Guide” is also available on Window Book’s web site at: <https://www.windowbook.com/Support/UserGuides>. Registration is required.

To become a user of their company’s PostalWeb site, the new user must be invited to join by an existing user with an Administrator role. The invitation is in the form of an email sent to the new user, and contains a link. When the new user clicks the link, a browser is launched and an *Invitation Account Setup* web page is displayed, a partial image of which is shown below:

A screenshot of the 'Invitation Account Setup' web page. The page has a blue header with the title 'Invitation Account Setup'. Below the title, a message states: 'Invitation Key Verification Completed Successfully. Please complete account registration below.' The form contains four fields: 'User Name*' with a text input box and a help icon, 'First Name*' with a text input box containing 'Mary', 'Last Name*' with a text input box containing 'Last Name', and 'Password*' with a text input box containing 'Password'. A note below the 'User Name' field states: 'Username can contain only Letters, Numbers and underscore '_', and must be at least 7 characters long'.

The new user then completes the form, and in the process creates a unique user name and password for future access to their company’s PostalWeb site. After the new user completes the account setup and agrees to the terms, the mail owner’s company-specific PostalWeb login page is displayed. Upon logging in for the first time using the credentials created earlier, the new user is prompted to complete their ‘Member Profile’. Upon completion of the Member Profile, the new user is able to use the PostalWeb site.

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LOGGING IN AND CREDENTIALS

ACCESSING POSTALWEB

To access their company-specific PostalWeb site, a user must have the login credentials (i.e. user name and password) that were generated when an employee was invited to participate in PostalWeb and the 'Invitation Account Setup' is successfully completed (refer to [BECOMING A POSTALWEB USER](#) for more information).

Although not mandatory, the user should if possible, login using the 'company-specific URL' assigned at the time the PostalWeb site was originally registered and configured. The 'company-specific URL' refers to the PostalWeb site with the company name as a sub-domain (a prefix to the 'postalweb.net' address). For example, if the company the user is associated with is named "PW Example", the company-specific URL for PostalWeb might be 'pwexample.postalweb.net'.

If the company-specific URL is not available, then the user should navigate to the generic PostalWeb login page at www.postalweb.net:

Login 1.800.524.0380

About Us Products Contact

PostalWeb®

Login Information

User name*

Password*

☐ Remember Me?

Log In

[Forgot your Password?](#) [Forgot your User Name?](#)

1.800.524.0380 | [Contact](#)

[Privacy](#) | [Terms](#) | [Developers](#)

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To log in to the PostalWeb site, do the following:

1. Open a web browser and navigate to the company-specific PostalWeb.net website;

2. When the *Login Information* screen is displayed, enter the user name. The user name is not case sensitive:


The screenshot shows the 'Login Information' section of the PostalWeb interface. At the top, there is a header with the 'Login' link and the phone number '1.800.524.0380'. Below this is a navigation bar with links for 'About Us', 'Products', and 'Contact'. The main content area is titled 'Login Information'. It contains two input fields: 'User name*' and 'Password*'. Both fields are highlighted with red rectangular boxes. Below the password field is a checkbox labeled 'Remember Me?'. A 'Log In' button is positioned below the checkbox. To the right of the button, there is a link: 'Forgot your Password? Forgot your User Name?'. At the bottom of the page, there is a footer with the phone number '1.800.524.0380', a 'Contact' link, and social media icons for Facebook, LinkedIn, and Twitter. Below these are links for 'Privacy', 'Terms', and 'Developers', and a copyright notice: '© 2015 Window Book, Inc., All rights reserved'.

3. Enter the password. The password is case sensitive;
4. Select (click) the 'Remember Me?' checkbox to be able to be logged back in to the PostalWeb site automatically without having to re-enter the login credentials if the browser is closed after logging in:

This screenshot shows the same 'Login Information' section as the previous one, but with the 'Remember Me?' checkbox highlighted by a red rectangular box. The 'User name*' and 'Password*' fields are no longer highlighted. All other elements, including the header, navigation bar, 'Log In' button, and footer, remain the same as in the previous screenshot.

After selecting the 'Remember Me?' checkbox, a warning will appear:



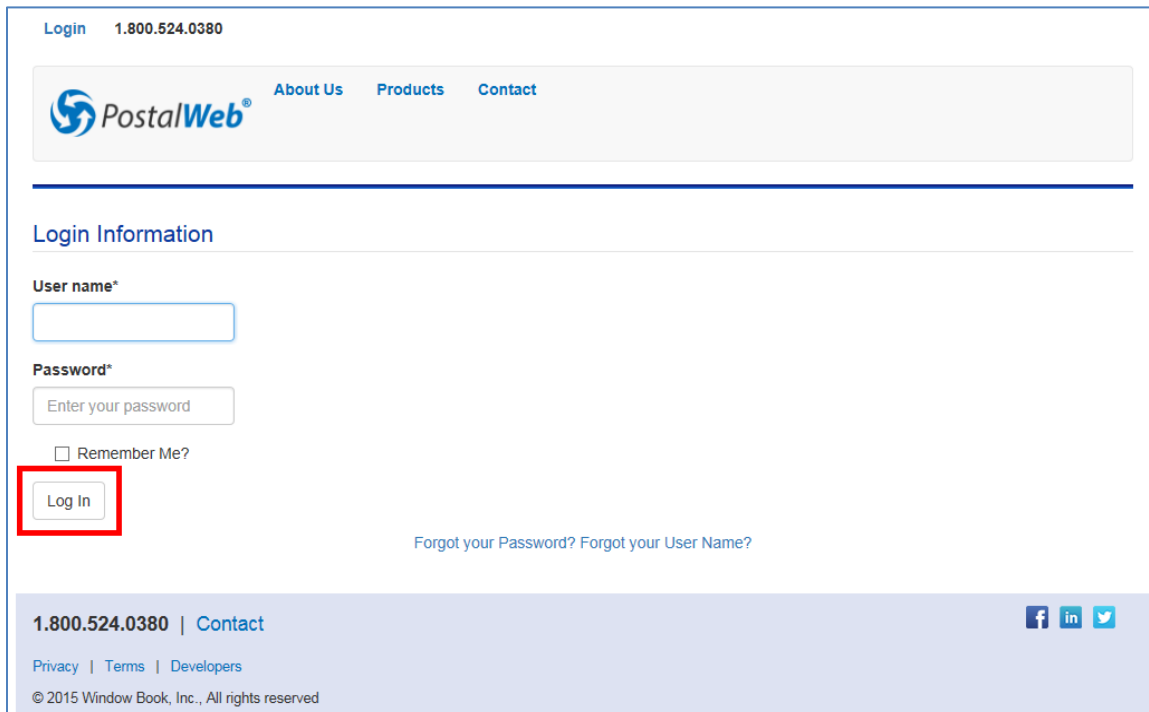
 **The 'Remember Me?' selection will cause the login information to be stored on the computer used to log in from and should not be selected if on a shared or public computer.**

 **The 'Remember Me?' selection will only function properly if the browser is set to accept cookies.**

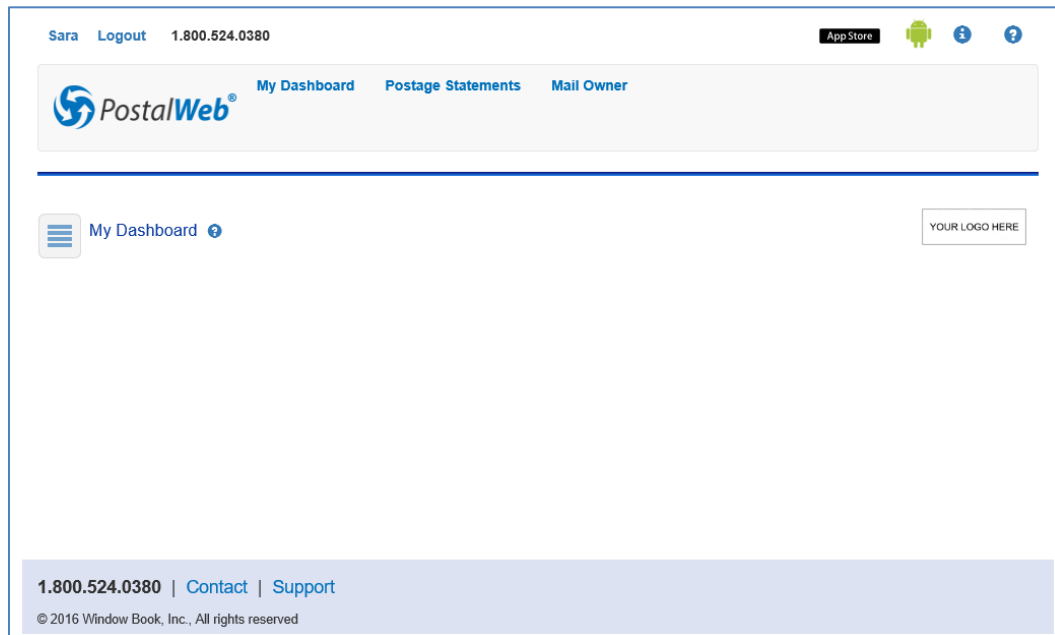
 **Users should defer to their own company's policies regarding security and browser settings.**

 **Asterisks indicate required fields throughout the PostalWeb site.**

5. After the login information has been entered click the **Log In** button:

A screenshot of the PostalWeb login page. At the top, there is a header with the "Login" link and the phone number "1.800.524.0380". Below this is a navigation bar with the PostalWeb logo and links for "About Us", "Products", and "Contact". The main section is titled "Login Information" and contains a "User name*" field, a "Password*" field with a placeholder "Enter your password", and a "Remember Me?" checkbox. The "Log In" button is highlighted with a red rectangle. Below the button, there are links for "Forgot your Password?" and "Forgot your User Name?". The footer includes the phone number "1.800.524.0380", a "Contact" link, social media icons for Facebook, LinkedIn, and Twitter, and links for "Privacy", "Terms", and "Developers". A copyright notice at the bottom reads "© 2015 Window Book, Inc., All rights reserved".

If the credentials used to log in are accepted, the *My Dashboard* screen is displayed (or the screen designated as the 'Start Page', see [Special Features](#), specifically [Setting The Start Page Via The Star Icon](#)) and the user may start using their company's PostalWeb site.



After clicking the **Log In** button, if an error message appears to the effect that 'The user name or password provided is incorrect', carefully re-type the user name and password and click the **Log In** button again. If the error message repeats, use the [Forgot your Password?](#) and/or the [Forgot your User Name?](#) links:

Login Information

Please check the Errors below.

- The user name or password provided is incorrect.

User name*

✕

Password*

☐ Remember Me?

Log In



Seven consecutive failed logins due to an incorrect password (but using a correct user name) will cause the account associated with the user name to become locked for 30 minutes. After at least 30 minutes have passed, attempt the login again.

Login Information

Please check the Errors below.


- Your account is locked out. Please wait 30 minutes and try again

User name*

Password*

☐ Remember Me?

After clicking the **Log In** button, if a page displays to the effect that the user's access has been denied, the user has likely been de-activated. In this case, the user must contact a site administrator to have the account activated:



Oops! Access to the resource you were looking for has been denied :-(

We're sorry, but an access denied event has occurred.

Your organization's Administrator may have disabled your account.
Please check with your Administrator before contacting Support.

[Try Going Back to the Previous Page](#)

If this condition continues, please use the support options listed below.

Customer service and support YOUR way!

We understand that customer service can be very personal in how each individual person prefers to engage with us. Accordingly, we offer access to technical support via various methods:

- Visit our [Support portal](#)
- Email us at TechSupport@windowbook.com
- Call us at **800-477-3602** (available Monday to Friday 8:00AM - 6:00PM EDT)
- When submitting your technical support issue, make sure to specify which software product you are having an issue with (PostalWeb®, eDM10X™, MDSM, etc.), which version number of the software you are using, and a detailed description of the issue you are having. Also include any applicable Mail.dat files, shipping files, PDF's of postage statements, reports impacted, and screen shots of any error messages you are getting. Providing this information in advance will result in the fastest resolution to your issue.

If other errors persist or the log in process appears to stall, see [APPENDIX 2](#).

RESETTING A PASSWORD



The user must already have an existing account with the PostalWeb site to use this process.

If a user is unable to recall their password, they can reset their existing password by clicking the link provided on the *Login Information* page 'Forgot your Password?':

Login Information

User name*

Enter your user name

Password*

Enter your password

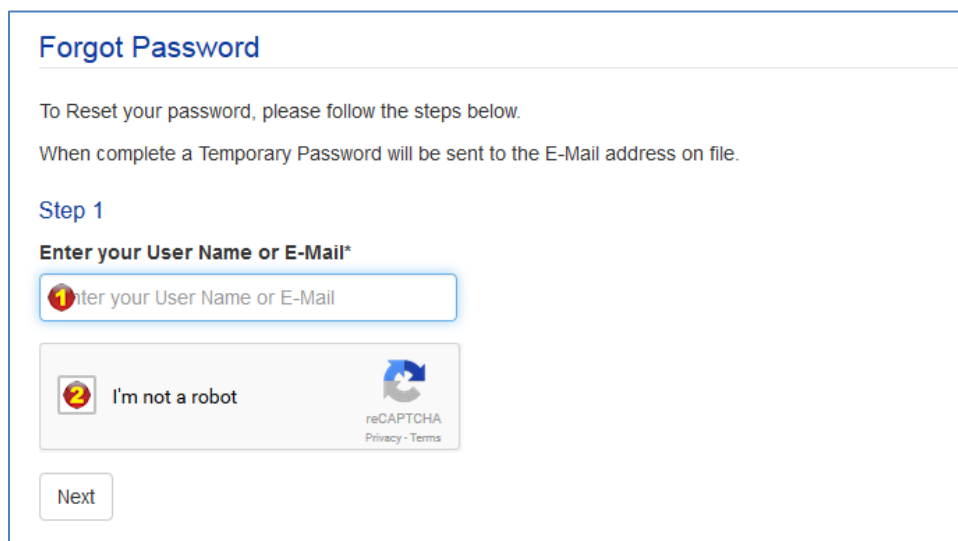
☐ Remember Me?

Log In

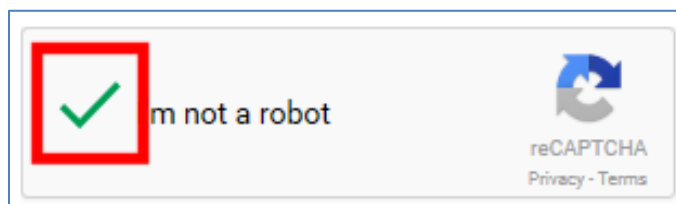
[Forgot your Password?](#) [Forgot your User Name?](#)

Clicking this link will start a process to reset the existing password. Upon successful completion of the process, the user's present password will be deleted and a new password will be assigned to the user by the website. The newly created password will be sent in an email to the email address listed in the user's [Member Profile](#).

After the user clicks the 'Forgot your Password' link, a new page will display, and the process of resetting the password will begin:




1. Enter User Name or E-Mail (1). To verify the identity of the person attempting to reset their password, the user must first enter either their user name, which is not case sensitive, or their email address. If entering an email address, it must be the same email address listed in the '[Member Profile](#)' for the account;
2. Complete the 'I'm not a robot' widget by clicking in the white square (2) and selecting the required pictures or entering the required text. The 'I'm not a robot' widget has been successfully completed when a green check mark appears in place of the box:



 If the 'I'm not a robot' does not appear in the browser, consult [APPENDIX 3](#).

3. After entering the user information, click the **Next** button;

 **If there is no account on file with the entered User Name or email address, an error will be displayed and the user will have to restart the process.**

4. Enter the answer to the security question. The answer entered here must be the same answer entered to the 'Security Question' when completing the *Invitation Account Setup* page when initially signing up to access the PostalWeb system. The answer is not case sensitive:

Forgot Password

To Reset your password, please follow the steps below.

When complete a Temporary Password will be sent to the Email address on file.

Step 2

Your Security Question Is: **What is your city of birth?**

Provide the answer to your security question*

5. Click the **Reset Password** button. The password will be reset to a new password, and an email containing the new password will be sent to the address listed in the '[Member Profile](#)';



If the answer entered is incorrect an error will be displayed and the user will have to start the process over.

6. After receiving the email and retrieving the newly created password, it can be used immediately to access the PostalWeb site. It is recommended to change the temporary password as soon as possible.

RETRIEVING A USER NAME



The user must already have an existing account with the PostalWeb site to use this process.

If a user is unable to recall their 'User Name' they can click the link provided on the login page 'Forgot your User Name?':

Login Information

User name*

Enter your user name

Password*

Enter your password

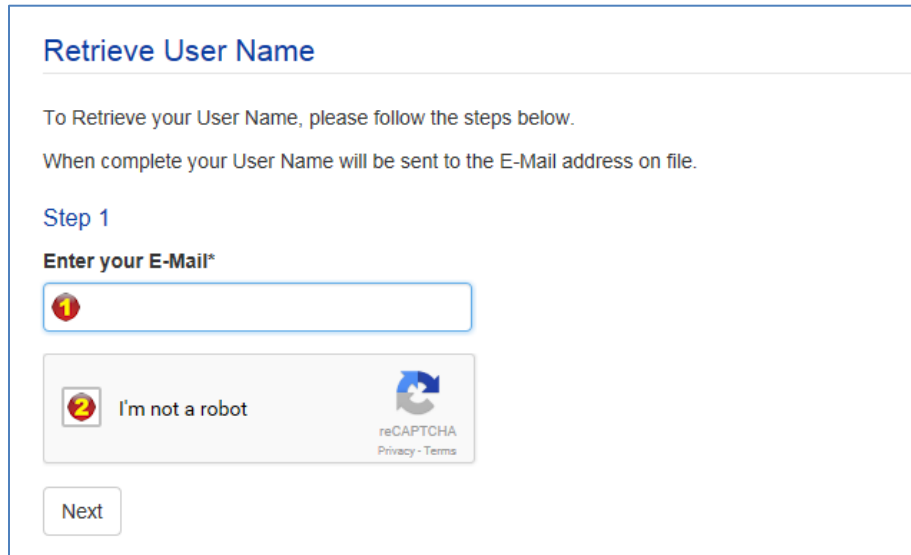
☐ Remember Me?

Log In

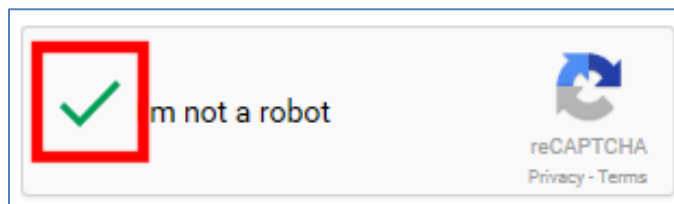
[Forgot your Password?](#) [Forgot your User Name?](#)

Clicking this link will start a process to send an email message containing the user's existing 'User Name'. The existing 'User Name' will not be changed.

Upon clicking the 'Forgot User name?' link the *Retrieve User Name* page is displayed:



1. Enter the Email Address (1). Use the same email address listed in the '[Member Profile](#)' on the PostalWeb site account;
2. Complete the 'I'm not a robot' widget by clicking in the white square (2) and selecting the required pictures or entering the required text. The 'I'm not a robot' has been successfully completed when a green check mark appears in place of the box:



If the 'I'm not a robot' does not appear in the browser, consult [APPENDIX 3](#).

3. Click the **Next** button;



If there is no account on file with the entered User Name or email address, an error will be displayed and the user will have to restart the process.

4. Enter the answer to the security question. The answer entered must be the same answer entered to the 'Security Question' when completing the *Invitation Account Setup* page at the initial PostalWeb signup. The answer is not case sensitive:

Retrieve User Name

To Retrieve your User Name, please follow the steps below.

When complete your User Name will be sent to the Email address on file.

Step 2

Your Security Question Is: **What is your city of birth?**

Provide the answer to your security question*

5. Click the **Retrieve User Name** button. An email will be sent to the email address listed in the '[Member Profile](#)' for the account. The 'User Name' information will be contained within the email.



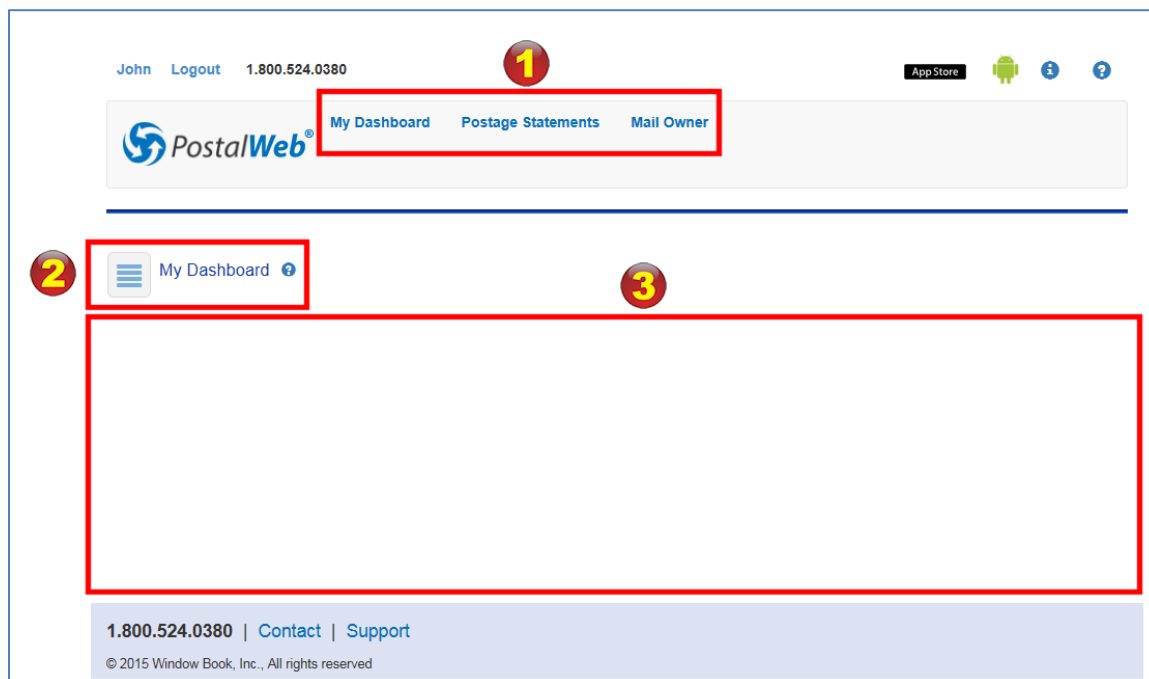
If the answer entered is incorrect an error will be displayed and the user will have to start the process over.

This page left blank intentionally.



POSTALWEB SITE GENERAL OVERVIEW

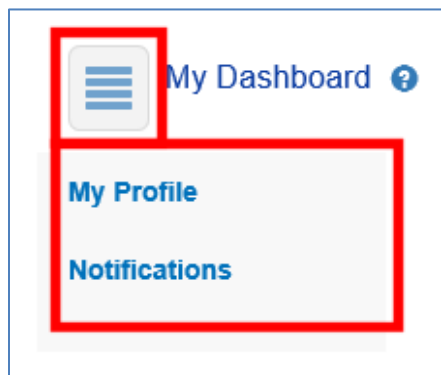
LAYOUT FUNDAMENTALS

The PostalWeb pages are organized into three main regions:







1 Top Menu: The top menu shows the main categories available. Depending on the role assigned to the user, not all of the categories shown in the example will be visible;

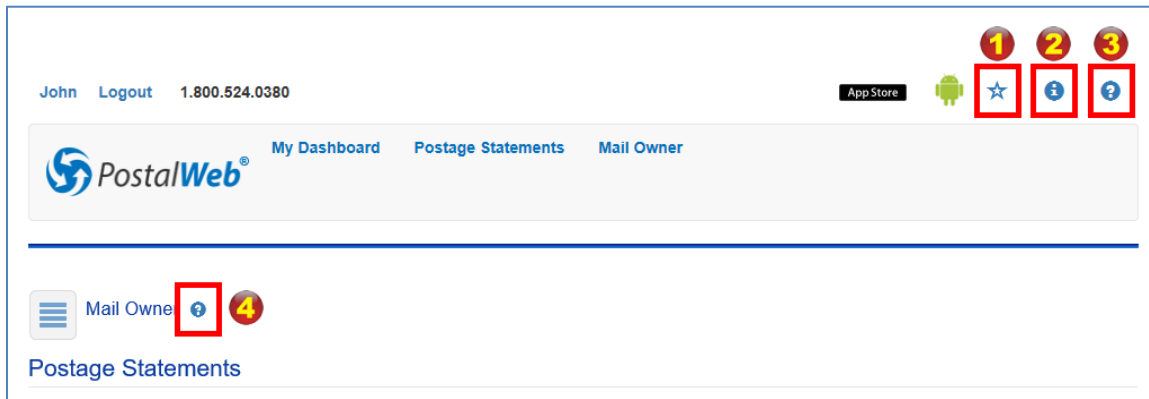
2 Side Menu (shown below in the expanded state): The side menu is typically a sub-menu of the main category selected. In its collapsed state, the side menu uses a menu icon  to denote its presence. To expand the side menu, click the menu icon .



3 Data (body): The general information area for the main category and/or selected side menu.

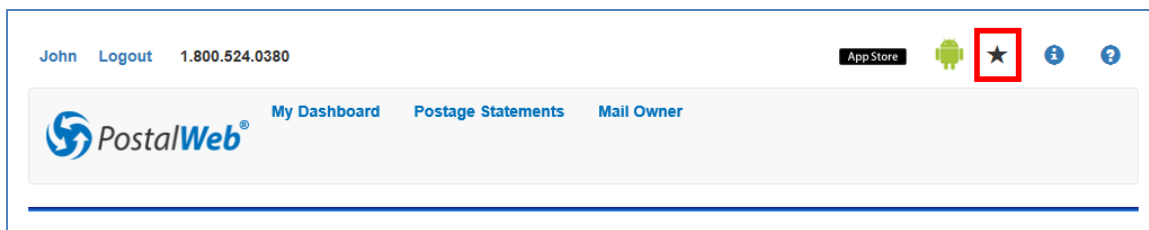
SPECIAL FEATURES

Note the 'Star' icon , the 'Information' icon , the 'Getting Started' help icon , and the basic help icon  as shown below:





Setting the Start Page Via the Star Icon



The star icon is used to set the 'Start Page', i.e. the first page displayed immediately upon logging into the PostalWeb site:



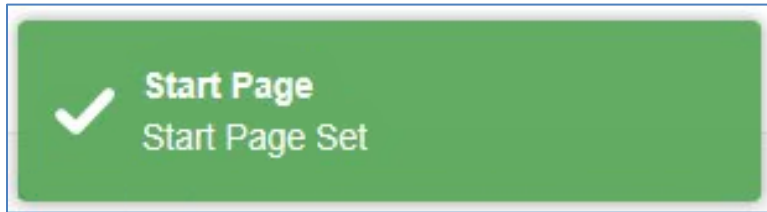
The default 'Start Page' is the 'My Dashboard' category with the 'My Dashboard' screen displayed. The 'Star Icon' is not displayed on this web page.


The star icon will show as solid black () when the currently displayed page is the 'Start Page'; otherwise the star icon will be displayed as a blue outline ().

To set the 'Start Page':


1. Navigate to the web page that is desired to be displayed first when logging in to the PostalWeb site;
2. If the star icon is solid black (), the page is already set as the 'Start Page' and no further action is necessary;
3. If the star icon is displayed as a blue outline (), then click the Star icon to set the 'Start Page';
4. The star will change from a blue outline to solid black;

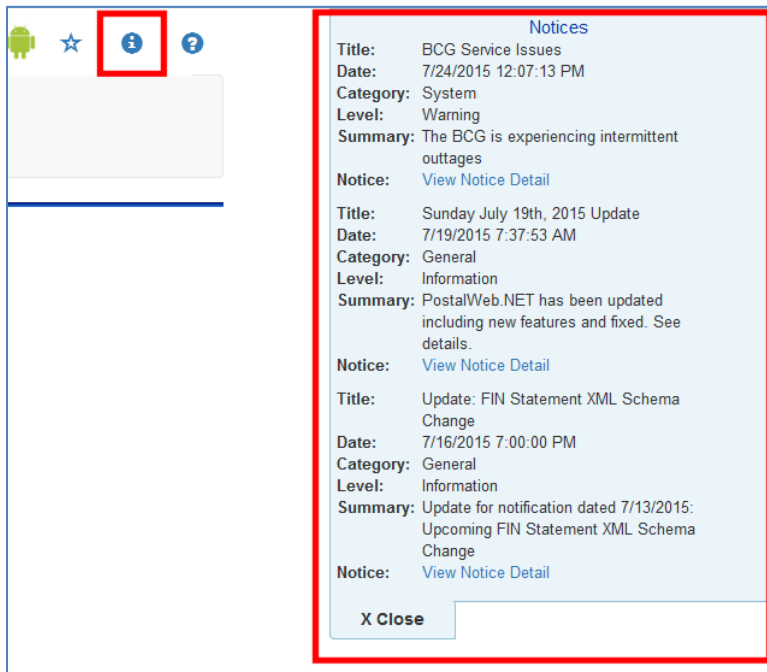
5. A confirmation message will appear:



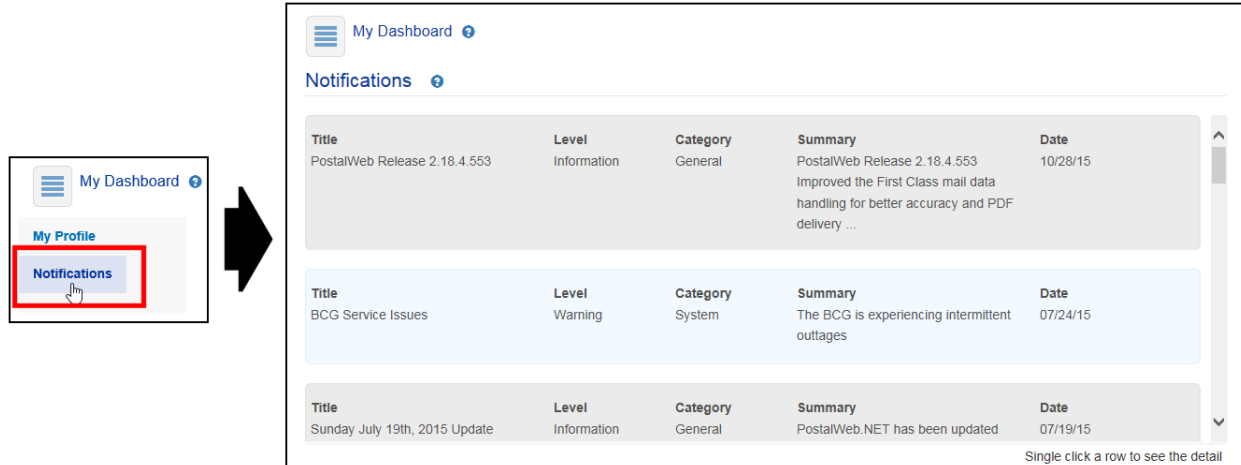
 ***The new setting may not become effective immediately depending on the web browser being used; however, it will be effective the next time the user logs in.***

Information Icon

The Information icon  on the upper right side of the screen, when clicked, displays a list of the three most recent 'Notifications' in the upper right corner of the web page. Notifications consist of messages from Window Book concerning new software releases, system status changes, etc.:




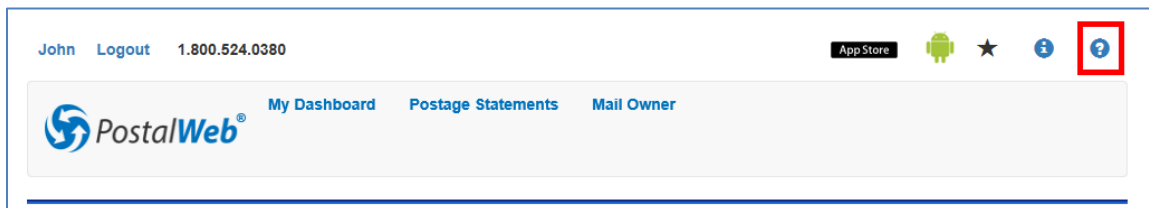
For a complete list of notifications, see the 'Notifications' side menu selection within the 'My Dashboard' category:



Notifications will also be emailed to the 'Primary Email' address listed in the user's 'Member Profile'.

Getting Started Help Icon

The 'Getting Started' help icon () is always located in the upper right-hand corner of all PostalWeb pages:

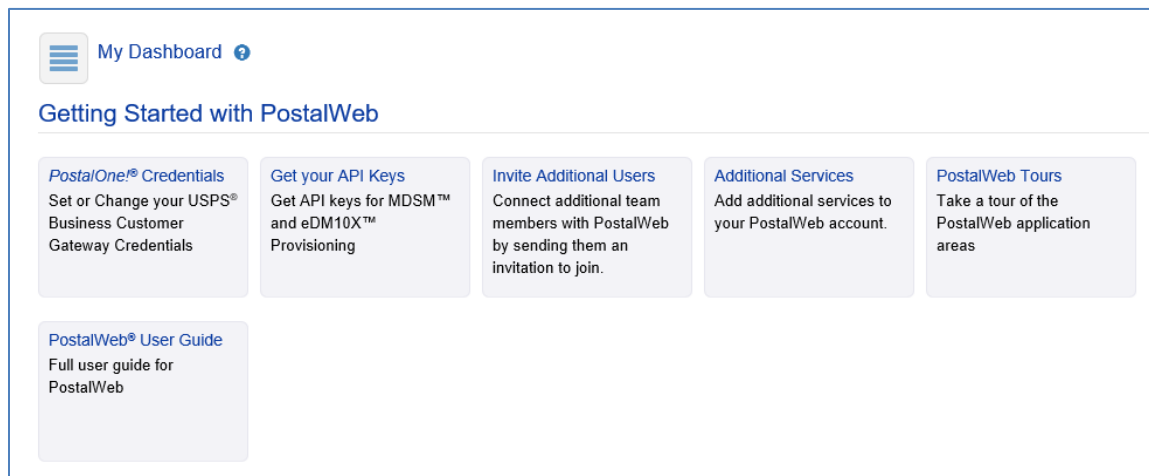


Clicking this icon will immediately display the *Getting Started with PostalWeb* page. The page displayed will depend on the role assigned to the user:

- [Administrator Role](#); or
- [User and IT Personnel Roles](#).

Administrator Role

The *Getting Started with PostalWeb* page contains colored areas that, when clicked on, link to important PostalWeb features:



The page previously displayed may be returned to by clicking the 'back' button on the browser.

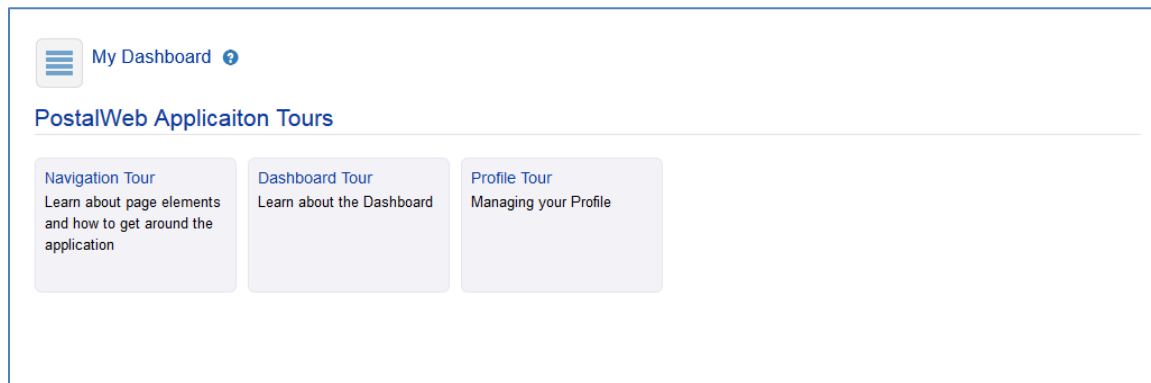
- **PostalOne!® Credentials:** Immediately displays the [Locations](#) page, where the *PostalOne!* credentials may be entered and edited;



*The **PostalOne! Credentials** tile should be used immediately after the initial login to allow the user to receive the past 88 days of postage statements and data from PostalOne! for jobs that have been mailed by a mail service provider that has an active PostalWeb account, or jobs that had their postage paid using a permit that is linked to the mail owner's PostalOne! CRID.*

- **Get your API Keys:** Immediately displays the [API Credentials](#) page;
- **Invite Additional Users:** Immediately displays the [Invite Users](#) page;
- **Additional Services:** Immediately displays the [Services](#) page;

- **PostalWeb Tours:** Immediately displays the *PostalWeb Application Tours* page, which contains colored areas that, when clicked on, starts a tour of selected areas of the PostalWeb site:



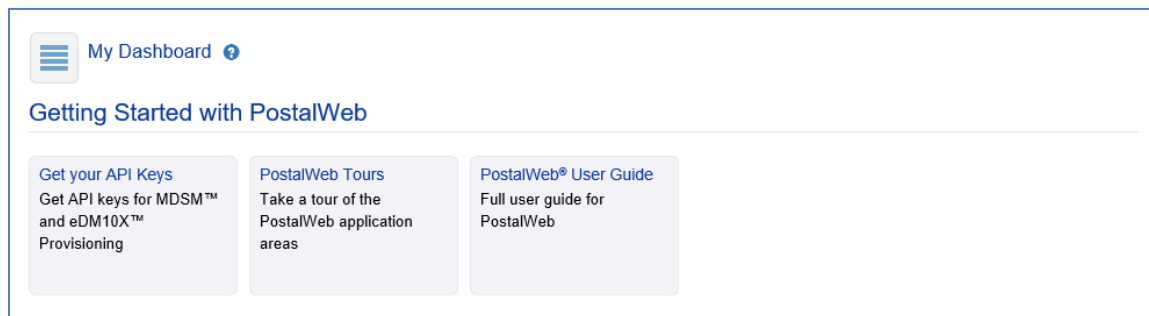
- **Navigation Tour:** Introduces the basic elements of PostalWeb that are available on all pages;
 - **Dashboard Tour:** Introduces the summary dashboard;
 - **Profile Tour:** Introduces the components of the *Member Profile* pages.
- **PostalWeb® User Guide:** Direct link to the online *PostalWeb for Mail Owners User Guide* .



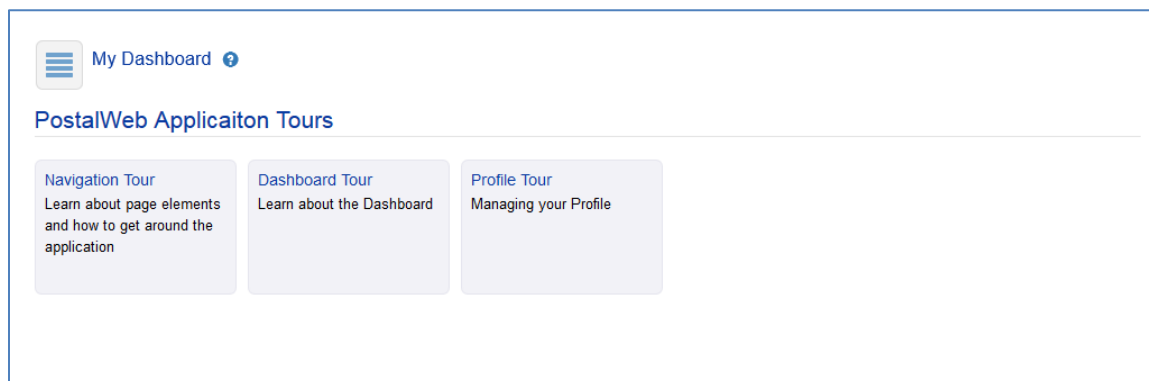
The “*PostalWeb for Mail Owners User Guide*” is also available on Window Book’s web site at: <https://www.windowbook.com/Support/UserGuides>. Registration is required.

User and IT Personnel Roles

The *Getting Started with PostalWeb* page contains colored areas that, when clicked on, link to important PostalWeb features:



- **Get your API Keys:** Immediately displays the [API Credentials](#) page;
- **PostalWeb Tours:** Immediately displays the *PostalWeb Application Tours* page, which contains colored areas that, when clicked on, starts a tour of selected areas of the PostalWeb site:



- **Navigation Tour:** Introduces the basic elements of PostalWeb that are available on all pages;
 - **Dashboard Tour:** Introduces the summary dashboard;
 - **Profile Tour:** Introduces the components of the *Member Profile* pages.
- **PostalWeb® User Guide:** Direct link to the online *PostalWeb for Mail Owners User Guide*.



The “PostalWeb for Mail Owners User Guide” is also available on Window Book’s web site at: <https://www.windowbook.com/Support/UserGuides>. Registration is required.

Basic Help Icon

Basic Help Icons (?) are placed at various locations on the PostalWeb site. When the mouse cursor hovers over a help icon, a box will be displayed containing a short description of the associated setting and its purpose:

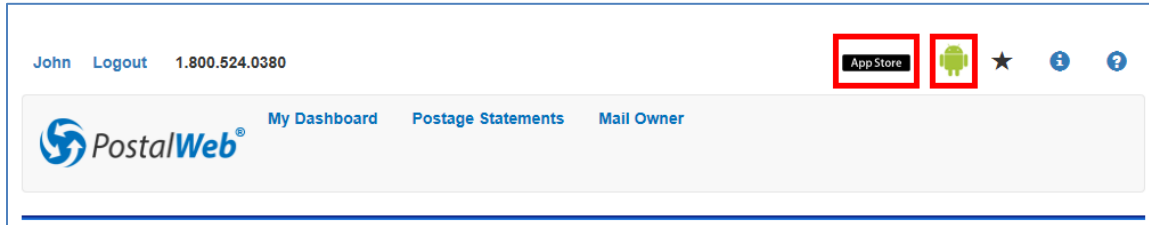


PostalWeb Apps for Mobile Phones

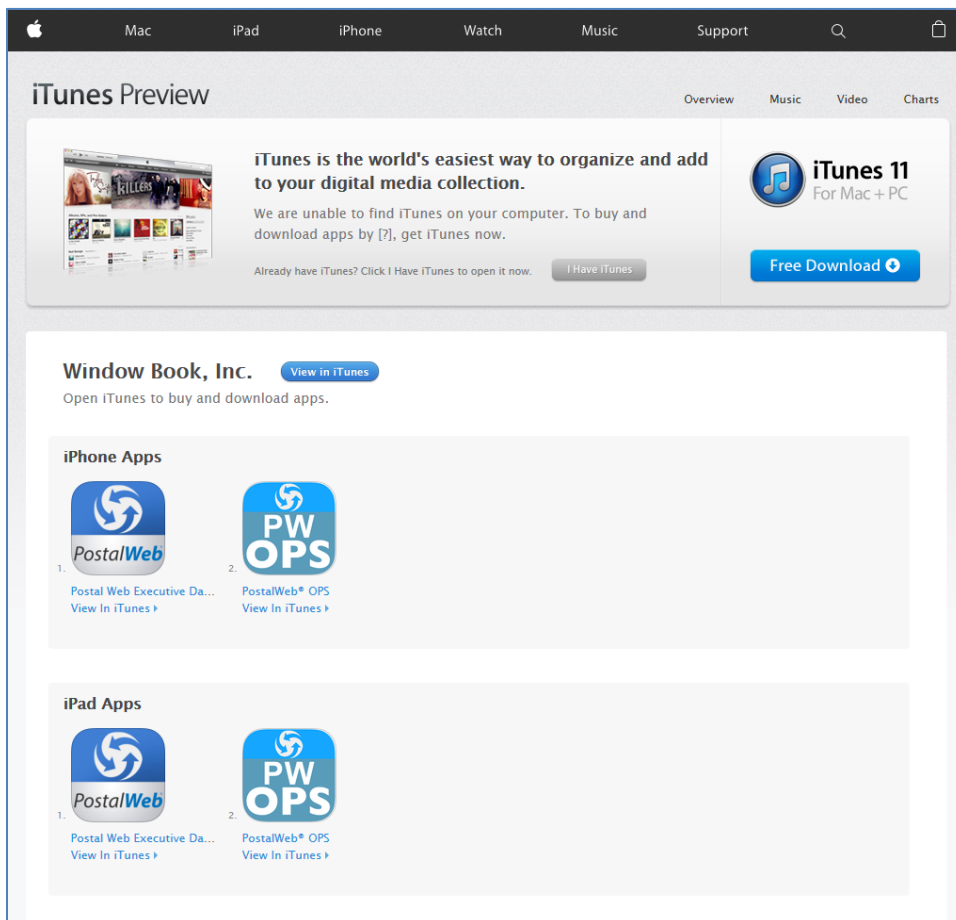
Window Book offers PostalWeb mobile phone apps for the Apple® and Android™ platforms.


Access to the Apps

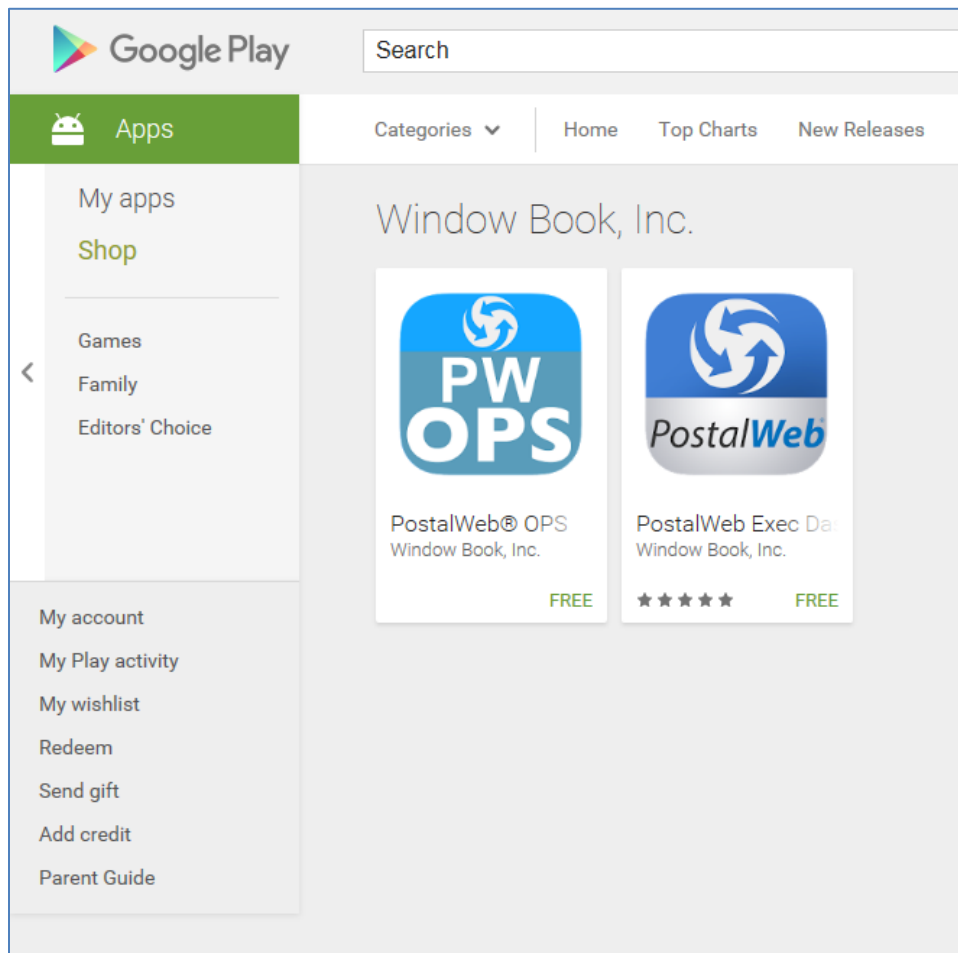
The apps for each platform may be accessed by clicking their respective icons near the top of all PostalWeb site pages:



The 'App Store' icon (**App Store**), when clicked, will open a new web page on the iTunes® app store. PostalWeb apps are available for the iPhone® and iPad®:



The 'Android' icon (), when clicked, will open a new web page on the Google Play™ store:



Available Apps

PostalWeb Executive Dashboard

The 'PostalWeb® Executive Dashboard' mobile app helps managers view the status of Mail.dat files submitted to *PostalOne!*. It also provides statistics on these submissions as well as postage summaries for date ranges requested by the user:

PostalWeb® Exec Dashboard
Window Book, Inc. Business
★★★★★ 1
Everyone

[Add to Wishlist](#) [Install](#)

Executive Dashboard Chart
Start Date: 12/03/2015

Bar chart showing Submissions (blue), UPD Docs (orange), and FIN Docs (green) for the period 11/16 - 11/22, 11/23 - 11/29, and 11/30 - 12/6.

Executive Dashboard Postage Report
From: 11/26/2015 To: 12/03/2015

Form/MailClass	Category	Rate Level	Pieces	Postage
3602-N Standard Non-Profit	Flats	DFSS	2,966	\$26,495.64
3602-N Standard Non-Profit	Flats	DNDC	102,195	\$21,988.67
3602-N Standard Non-Profit	Flats	DS/CF	491,564	\$96,521.32
3602-N Standard Non-Profit	Flats	None	10,907	\$2,568.46
3602-R				

Executive Dashboard Statistics
From: 11/16/2015 To: 12/06/2015

Total Jobs	5
Total Pieces	1,660
Total UPD Statements	5
Total Canceled Statements	0
Total Postage	\$879.03
Total Finalized Statements	5
Total Reversed Statements	0

PostalWeb OPS

The 'PostalWeb® OPS' mobile app notifies mailers when new postage statements have been retrieved from *PostalOne!* and are available on their PostalWeb site.



ROLES

All users of a PostalWeb site are assigned a 'role'. A role can be thought of as a permissions level. When a person is invited to become a PostalWeb user (see [Becoming a PostalWeb User](#)), they are assigned a role by the site Administrator at the time the invitation is made. Their role can be changed at a later date by the appropriate personnel.

The following is a list of the available roles and an explanation of each role:

- 'Administrator' or 'Mail Owner Admin' has full access to the entire site and should be assigned with great care. Administrators can assign any role;
- 'IT Personnel' has minimal access, similar to a user, but is intended for the purpose of targeting system messages such as critical updates to client software;
- 'User' or 'Mail Owner User' typically only receives automated communications such as e-mailed statements and confirmation pages but does not normally access PostalWeb's EDocs dashboards.



The term 'user' is used throughout this document as a general name for any member of a PostalWeb site, not as the specific role level of 'User' or 'Mail Owner User'.



Features available for the various roles are shown in [APPENDIX 1](#).

This page left blank intentionally.

POSTALWEB SITE MAP

This section is intended as a map of PostalWeb to aid the user in navigation.



Not all roles have the required permissions to view all categories and sub-categories. These limitations will be noted in each section.

The PostalWeb site described here is that part of the site that is exposed after an existing user has properly logged in. For instructions referring to the registration of a new PostalWeb site, sign-up of a new user, or setup and configuration of a PostalWeb site, please refer to the *PostalWeb for Mail Owners Setup Guide*, which is available on the Window Book web site at:

<https://www.windowbook.com/Support/UserGuides>. Registration is required.

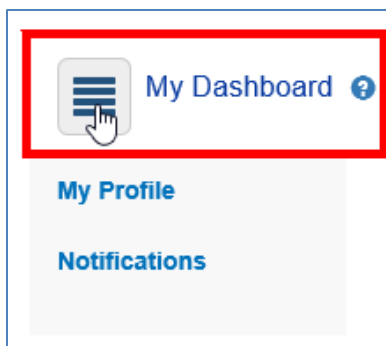
MY DASHBOARD

Role Access: ALL

This category generally contains information about the individual PostalWeb user, such as contact information and log in credentials:



Clicking the 'My Dashboard' side menu icon exposes the side menu:



The options within the 'My Dashboard' category are:

- [My Profile / Member Profile](#); and
- [Notifications](#).

My Profile/Member Profile

Role Access: ALL

When 'My Profile' is selected, the 'My Dashboard' heading at the side menu changes to 'Member Profile' and a new side menu with 'Member Profile'-specific options becomes available. The 'Member Profile' options all center around the user's personal profile and security credentials.



This is the only sub-category where the heading on the side menu changes and does not reflect a top menu heading.

After selecting the menu option 'My Profile', a new screen is displayed with 'Member Profile' shown as the new side menu heading:

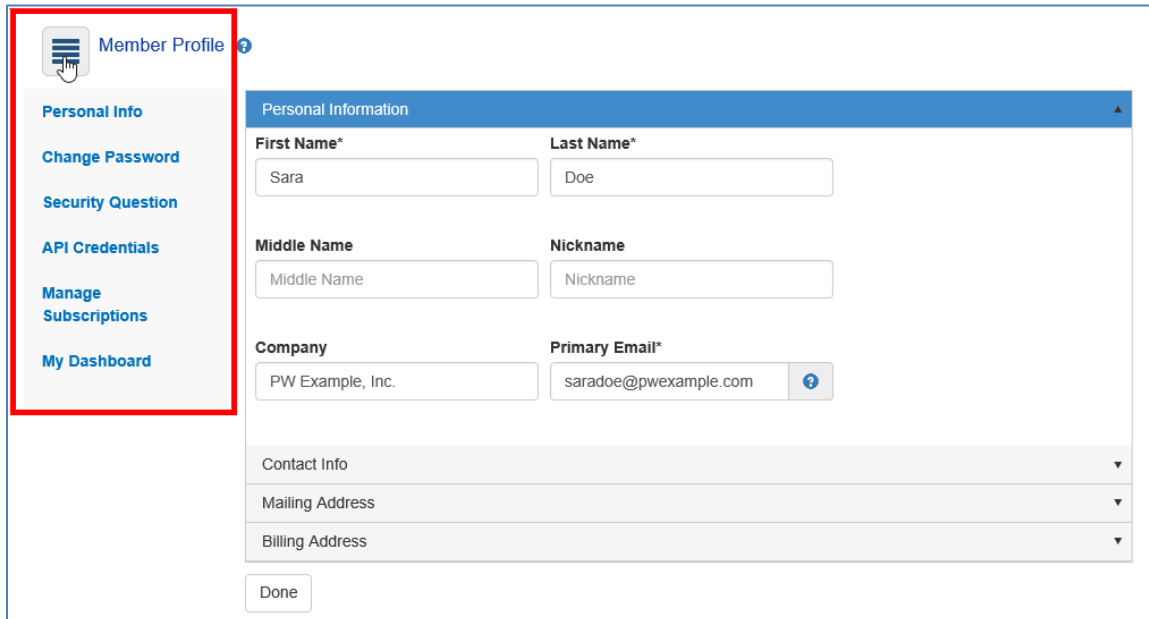
The diagram illustrates the navigation process. On the left, a side menu is shown with 'My Dashboard', 'My Profile', and 'Notifications'. 'My Profile' is highlighted with a red box and a mouse cursor. A large black arrow points to the right, where the 'Member Profile' screen is displayed. The screen has a header 'Member Profile' with a help icon. Below it is a 'Personal Information' section with a blue header and a dropdown arrow. The form contains the following fields:

First Name*	Last Name*	Middle Name
Sara	Doe	Middle Name

Nickname	Company	Primary Email*
Nickname	PW Example, Inc.	saradoe@pwexample.com ?

Below these are expandable sections: 'Contact Info', 'Mailing Address', and 'Billing Address', each with a dropdown arrow. At the bottom is a 'Done' button.

Clicking the 'Member Profile' side-menu icon expands the side menu and shows the options specific to 'Member Profile':



The screenshot displays the 'Member Profile' interface. On the left, a side menu is expanded, showing the following options: [Personal Info](#), [Change Password](#), [Security Question](#), [API Credentials](#), [Manage Subscriptions](#), and [My Dashboard](#). The main content area is titled 'Personal Information' and contains several input fields: 'First Name*' (Sara), 'Last Name*' (Doe), 'Middle Name' (Middle Name), 'Nickname' (Nickname), 'Company' (PW Example, Inc.), and 'Primary Email*' (saradoe@pwexample.com). Below these fields are three expandable sections: 'Contact Info', 'Mailing Address', and 'Billing Address'. A 'Done' button is located at the bottom left of the main content area.

The options within the 'Member Profile' side menu are:

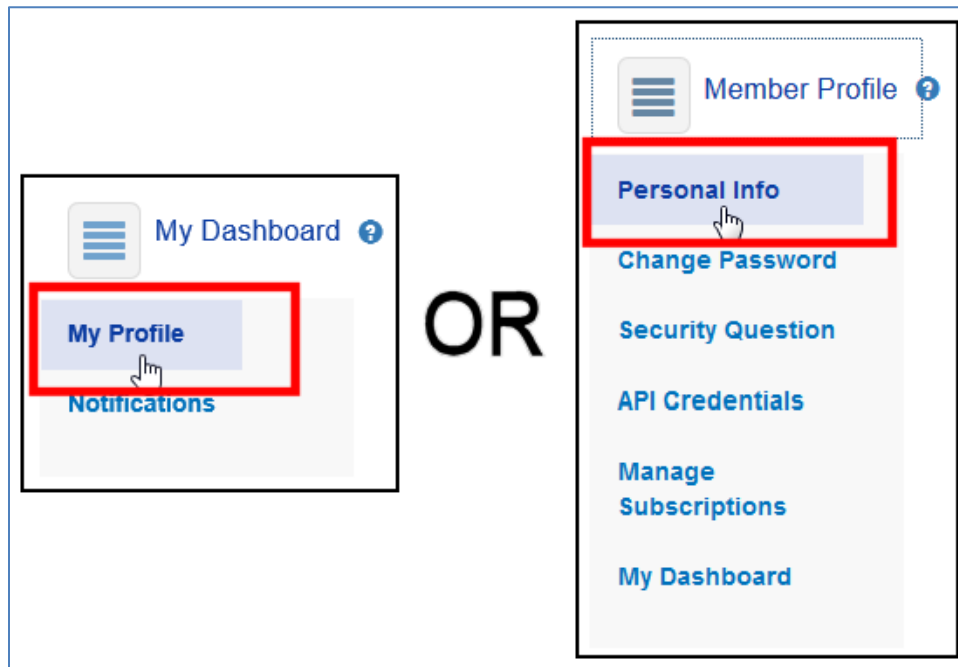
- [Personal Info](#);
- [Change Password](#);
- [Security Question](#);
- [API Credentials](#);
- [Manage Subscriptions](#) ; and
- [My Dashboard](#).

Personal Info

Role Access: ALL

Allows the user to enter or edit contact information. The *Personal Information* screen can be displayed by either:

- Clicking the 'My Profile' side menu option when 'My Dashboard' is displayed as the side menu heading;
- Clicking the 'Personal Info' side menu option if the 'Member Profile' heading is displayed:



Personal Information

The following are the contents of the *Personal Information* screen (required fields are denoted with an asterisk '*'):

Member Profile ⓘ

Personal Information ▲

First Name*	Last Name*	Middle Name
Sara	Doe	Middle Name
Nickname	Company	Primary Email*
Nickname	PW Example, Inc.	saradoe@pwexample.com ⓘ

Contact Info ▼

Mailing Address ▼

Billing Address ▼

Done

- **First Name*:** First name of user;
- **Last Name*:** Last name of user;
- **Middle Name:** Middle name or initial of user;
- **Nickname:** A custom, substitute name the user prefers to be referred to;
- **Company:** Typically the name of the user's employer;
- **Primary Email*:** The user's primary company email address. This email address is used for various communications purposes, including system notifications and verification of identity.



It is important to enter a valid, functioning email address. If the user forgets their password or User Name, the information needed to resume using the account will be sent to this email address.

Contact Info

To select the *Contact Info* screen, place the mouse cursor on the rectangle that contains the 'Contact Info' text and click it:

The screenshot shows the 'Member Profile' page. At the top, there is a 'Member Profile' header with a menu icon and a help icon. Below this is a 'Personal Information' section with fields for First Name (Sara), Last Name (Doe), Middle Name (Middle Name), Nickname (Nickname), Company (PW Example, Inc.), and Primary Email (saradoe@pwexample.com). Below the 'Personal Information' section, there is a 'Contact Info' section which is highlighted with a red box. The 'Contact Info' section includes a 'Contact Info' link, a 'Mailing Address' field, and a 'Billing Address' field. At the bottom of the page is a 'Done' button.

After clicking the 'Contact Info' text, a new page will open to display the items on the *Contact Info* screen:

The screenshot shows the 'Member Profile' page with the 'Contact Info' section expanded. The 'Contact Info' section is highlighted in blue. It contains fields for Home Phone, Work Phone, and Other Phone. Below these fields is a 'Mobile Phone' section with a 'Cell Phone' field and a toggle switch for 'Use Mobile Messaging' (currently OFF). Below the 'Mobile Phone' section are 'Mailing Address' and 'Billing Address' fields. At the bottom of the page is a 'Done' button.

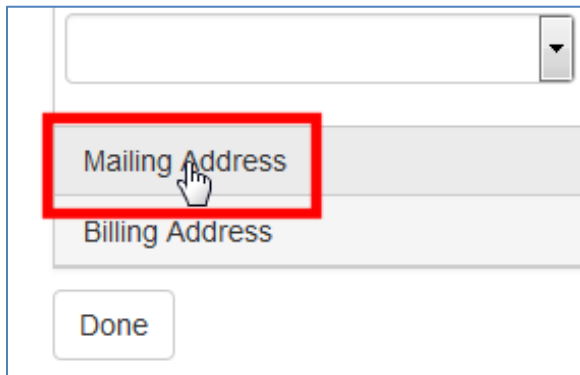
- **Home Phone:** The user's home phone number;
- **Work Phone:** The user's work phone number;
- **Other Phone:** A secondary phone if available;
- **Mobile Phone:** The user's cell phone if available.



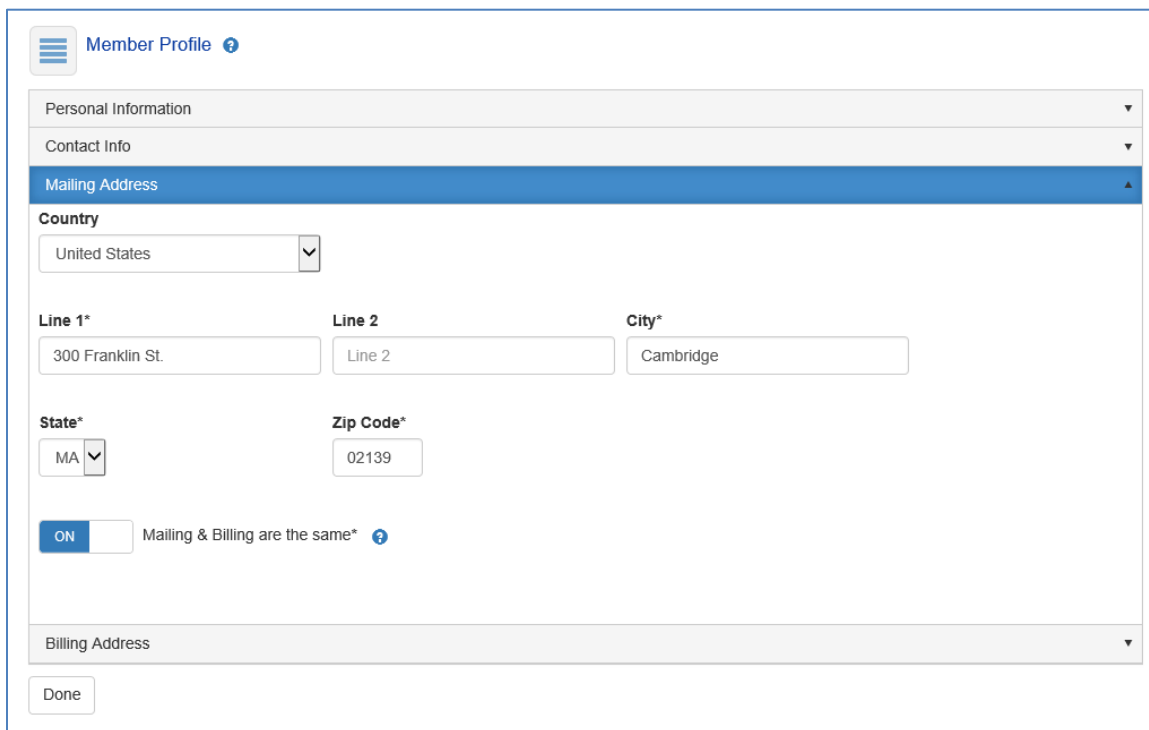
'Use Mobile Messaging' may be used in the future, but is currently inactive (as of September 2016).

Mailing Address

To select the *Mailing Address* screen, place the mouse cursor on the rectangle that contains the 'Mailing Address' text and click it:

A screenshot of a web interface showing a dropdown menu. The menu has three options: 'Mailing Address', 'Billing Address', and 'Done'. The 'Mailing Address' option is highlighted with a red rectangular box, and a mouse cursor is pointing at it. The 'Billing Address' option is below it, and the 'Done' button is at the bottom.

After clicking the 'Mailing Address' text, a new page will open to display the items on the *Mailing Address* screen:

A screenshot of the 'Mailing Address' screen in a web application. At the top, there is a 'Member Profile' link with a question mark icon. Below it, there are three tabs: 'Personal Information', 'Contact Info', and 'Mailing Address'. The 'Mailing Address' tab is selected and highlighted in blue. The form contains the following fields: 'Country' (a dropdown menu showing 'United States'), 'Line 1*' (a text box with '300 Franklin St.'), 'Line 2' (a text box with 'Line 2'), 'City*' (a text box with 'Cambridge'), 'State*' (a dropdown menu showing 'MA'), and 'Zip Code*' (a text box with '02139'). There is also a checkbox labeled 'ON' with the text 'Mailing & Billing are the same*' next to it. At the bottom, there is a 'Billing Address' tab and a 'Done' button.

The address entered here should be the address of the company location where the user is currently working at. This information is used to send correspondence, statements, etc.

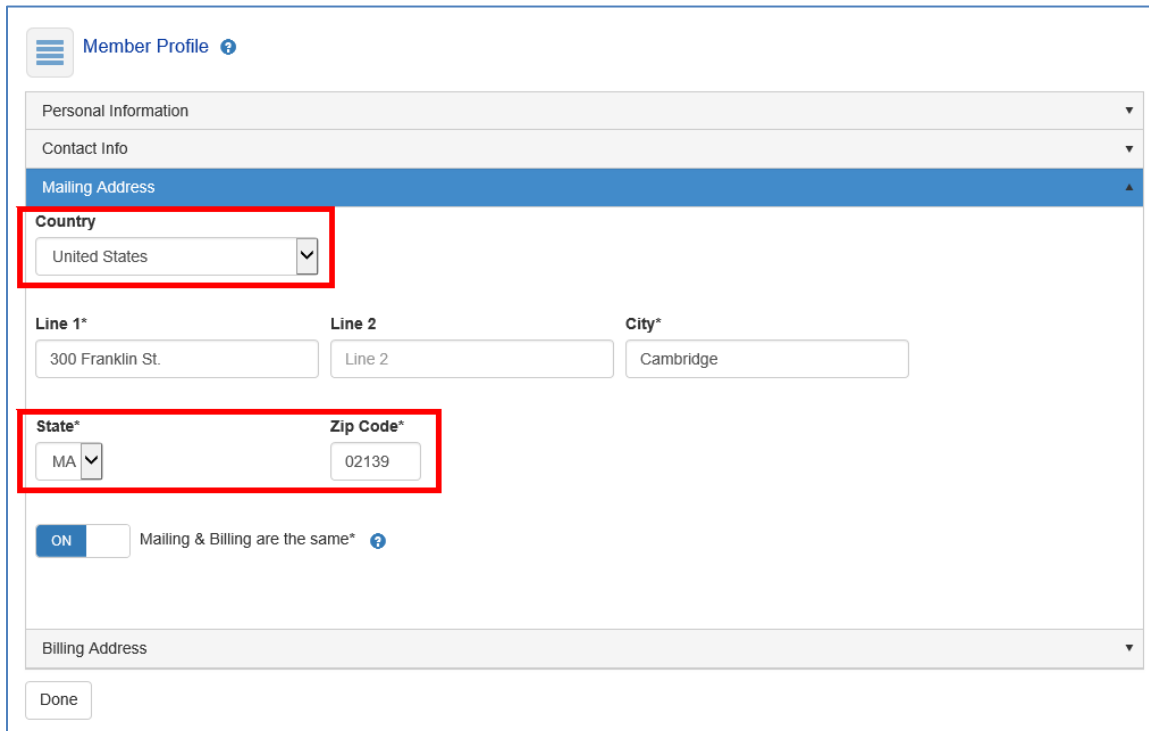
- **Country:** Select the country the mailer resides in using the pull-down menu; either 'United States' or 'Canada'. This selection changes the display of some of the other entries noted below;
- **Line 1*:** Street Address of the company;

- **Line 2:** Secondary street address, if necessary;
- **City*:** The city of the company's location;
- **Mailing & Billing are the same*:** If the mailing and billing address are the same, set to '**ON**'. The mailing information entered will automatically be copied to the *Billing Address* screen.



Click the button graphic to toggle between '**ON**' () and '**OFF**' ()

If the country selected earlier is 'United States', the following fields are displayed:



Member Profile ⓘ

Personal Information ▼

Contact Info ▼

Mailing Address ▲

Country ▼
United States

Line 1* Line 2 City*

300 Franklin St. Line 2 Cambridge

State* Zip Code*

MA 02139

☒ ON Mailing & Billing are the same* ⓘ

Billing Address ▼

Done

- **State*:** Select the State from the pull-down menu.
- **ZIP Code*:** The base 5-digit ZIP Code of the company location;

If the country selected earlier is 'Canada', the following fields are displayed:

Member Profile ?

Personal Information ▼

Contact Info ▼

Mailing Address ▲

Country ▼

Canada ▼

Line 1* Line 2 City*

300 Franklin St. Line 2 Cambridge

Province* Postal Code*

Postal C

ON Mailing & Billing are the same* ?

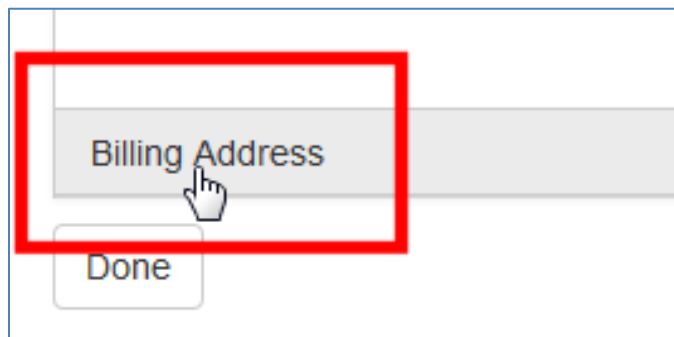
Billing Address ▼

Done

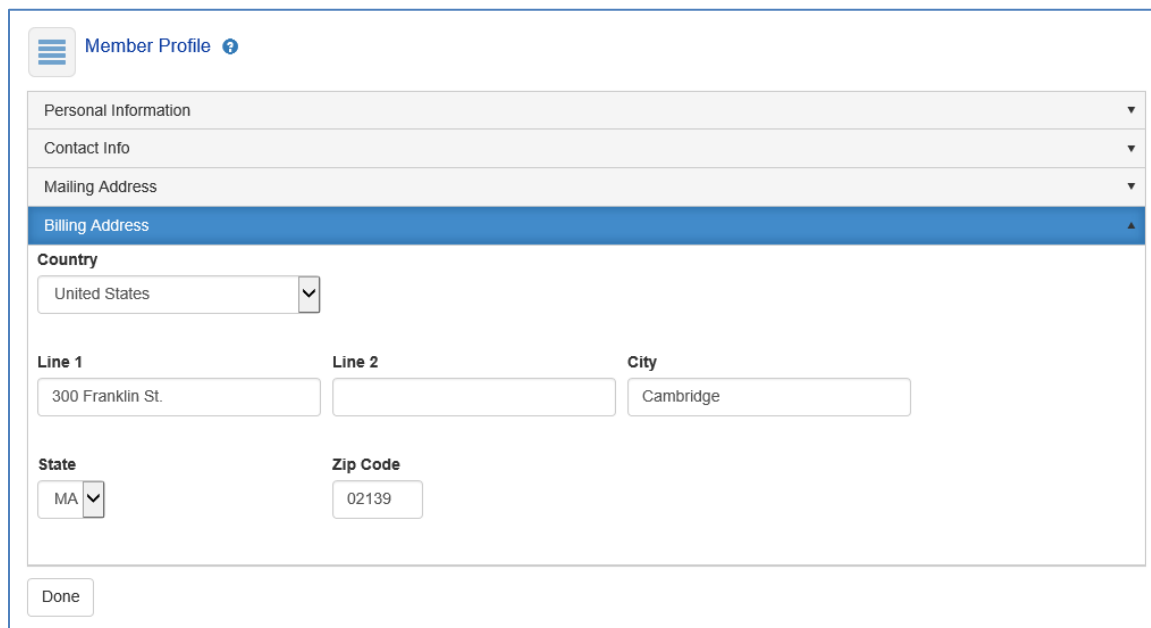
- **Province*:** Select the Canadian province the Company resides in from the pull-down menu selection;
- **Postal Code*:** The Canadian postal code the Company resides in.

Billing Address

To select the *Billing Address* screen, place the mouse cursor on the rectangle that contains the 'Billing Address' text and click it;



After clicking the 'Billing Address' text, a new page will open to display the items on the *Billing Address* screen:



- **Line 1, Line 2, City; State and ZIP Code (for US) or Province and Postal Code (for Canada):** The company address to send billings to.

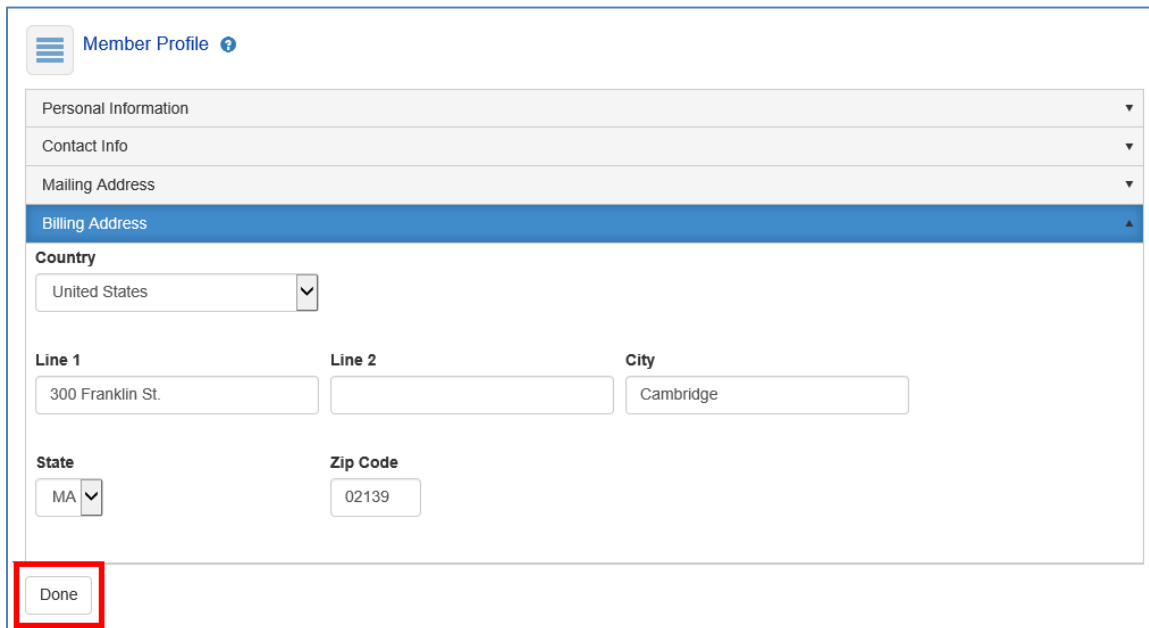


The address entered here should be the address of the location that billables, statements, etc. should be sent to.



When changing the Billing Address, make sure the 'Mailing & Billing are the same' option located on the 'Mailing Address' screen is set to 'ON'.

When all items have been entered or edited in the *Personal Information* screens, the user must click the **Done** button for the changes to take effect:

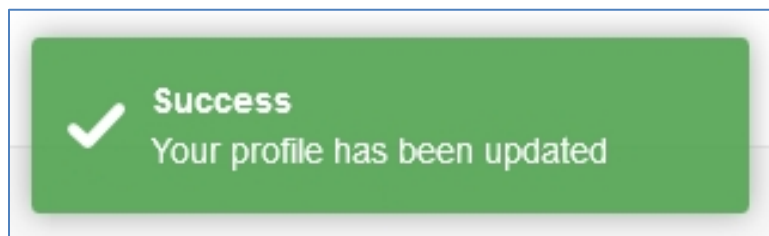



The screenshot shows the 'Member Profile' page with a sidebar menu containing 'Personal Information', 'Contact Info', 'Mailing Address', and 'Billing Address'. The 'Billing Address' section is active and displays the following fields:

- Country:** United States (dropdown menu)
- Line 1:** 300 Franklin St. (text input)
- Line 2:** (empty text input)
- City:** Cambridge (text input)
- State:** MA (dropdown menu)
- Zip Code:** 02139 (text input)

A red rectangular box highlights the 'Done' button located at the bottom left of the form.

A confirmation will display:

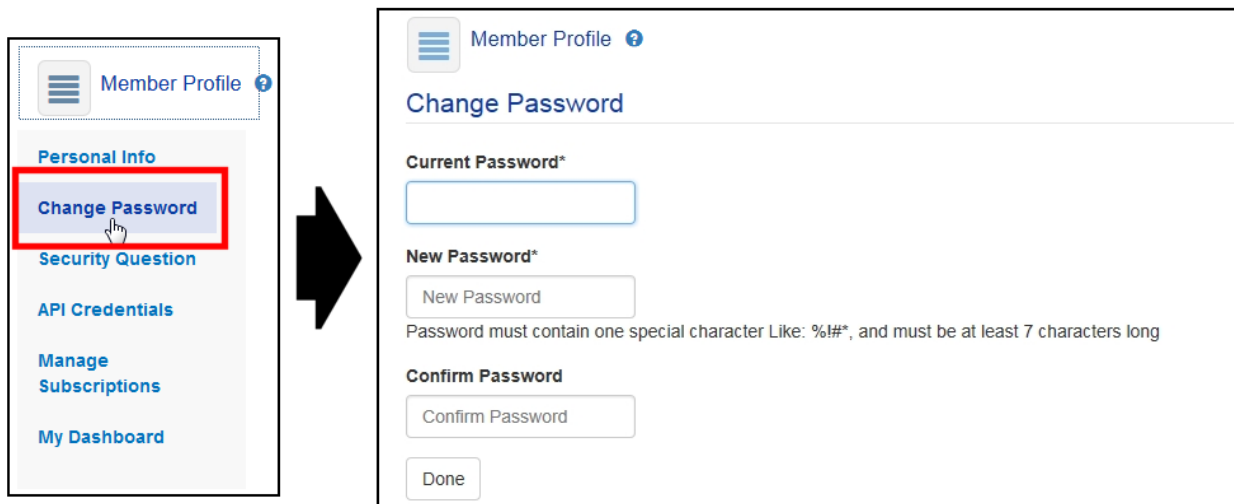


 ***Navigating away from the 'Personal Information' screens without first clicking the 'Done' button will cancel any changes that have been made.***

Change Password

Role Access: ALL

Allows the user to change the password used for accessing their PostalWeb site:



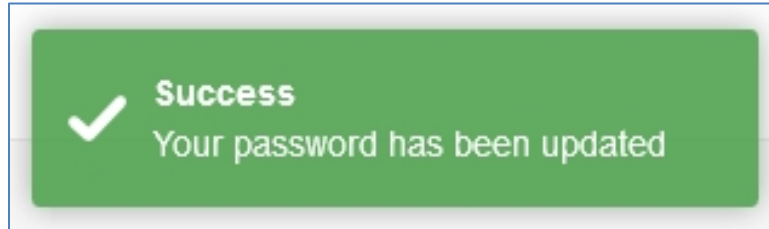
The following are the contents of the *Change Password* screen:


- **Current Password*:** Enter the current password assigned to this account;
- **New Password*:** Create and enter a password of your choosing. The password must be:
 - At least 7 characters long; and
 - Must contain a "special character" (i.e. ~ ` ! @ # \$ % ^ & * () _ + | - = \ [] { } ; ' : , . < > / ?).
 - As the new password is entered, a 'Password Strength' meter will be displayed and show the approximate strength of the password:



- **Confirm Password:** The password entered here must match exactly the password entered in the 'New Password' field.

When finished, the user must click the **Done** button to implement the new password. A confirmation message will display:



 ***Navigating away from the 'Change Password' screen without first clicking the 'Done' button will cancel any changes that have been made and the new password will not be implemented.***

Security Question

Role Access: ALL

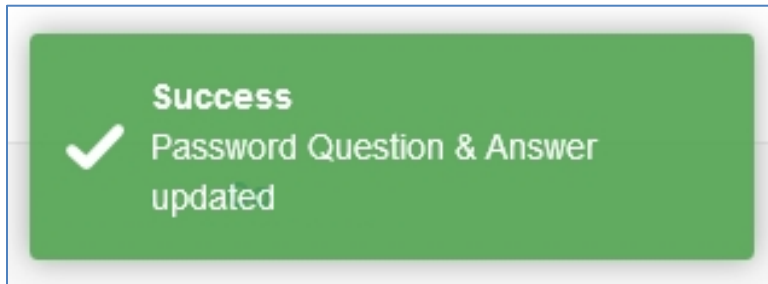
Allows the user to change the 'Security Question' or the answer to a 'Security Question'. The 'Security Question' is used when the user asks to have their password reset via the 'Forgot Your Password' or via the 'Forgot Your User Name' links on the login screen (refer to [Resetting a Password](#) and/or [Retrieving a User Name](#)). The user must know the security answer to complete these requests:

The diagram illustrates the navigation process. On the left, a 'Member Profile' menu is shown with options: Personal Info, Change Password, Security Question (highlighted with a red box and a mouse cursor), API Credentials, Manage Subscriptions, and My Dashboard. A large black arrow points from this menu to the 'Change Question' screen on the right. The 'Change Question' screen contains the following fields: 'Current Password*' (text input), 'Security Question*' (dropdown menu with 'Mothers maiden name?' selected), 'Security Answer*' (text input), 'Confirm Answer*' (text input), and a 'Done' button at the bottom.

The following are the contents of the *Change Question* screen:

- **Current Password*:** In order to change the 'Security Question' or 'Security Answer', the correct password for the account must be entered;
- **Security Question*:** Clicking the 'Security Question' drop down will expose numerous questions. One of the questions must be selected;
- **Security Answer*:** The answer provided by the user for the selected 'Security Question'. Answers may be any type text of any length but the user needs to remember the answer for future use as described above;
- **Confirm Answer*:** The 'Confirm Answer' entry must match the 'Security Answer' exactly, including the upper and lower case used in the 'Security Answer'.

When finished configuring the new 'Security Answer' click the **Done** button. A confirmation will display:

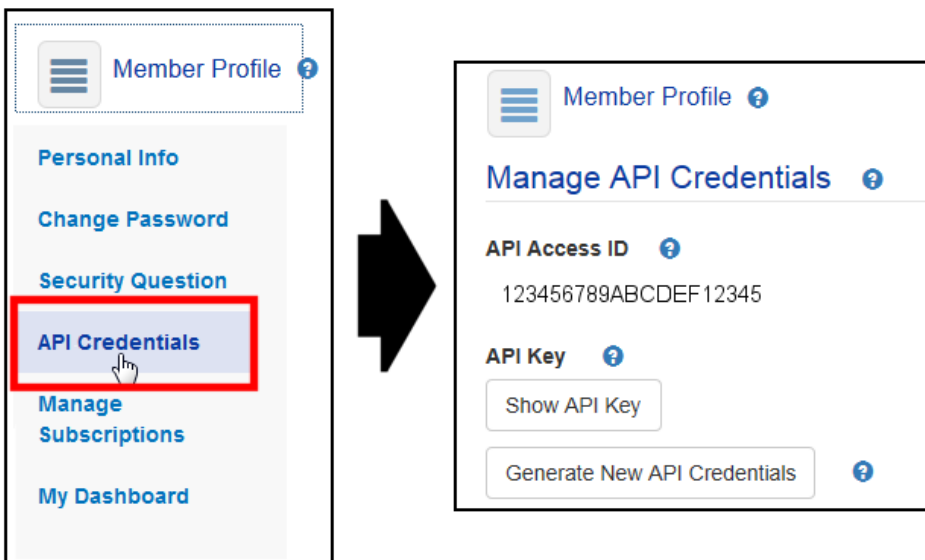


! *Navigating away from the 'Change Question' screen without first clicking the 'Done' button will cancel any changes that have been made, and the new 'Security Question' and/or 'Security Answer' will not be implemented.*

API Credentials

Role Access: ALL

Allows the user to view their assigned API Credentials:



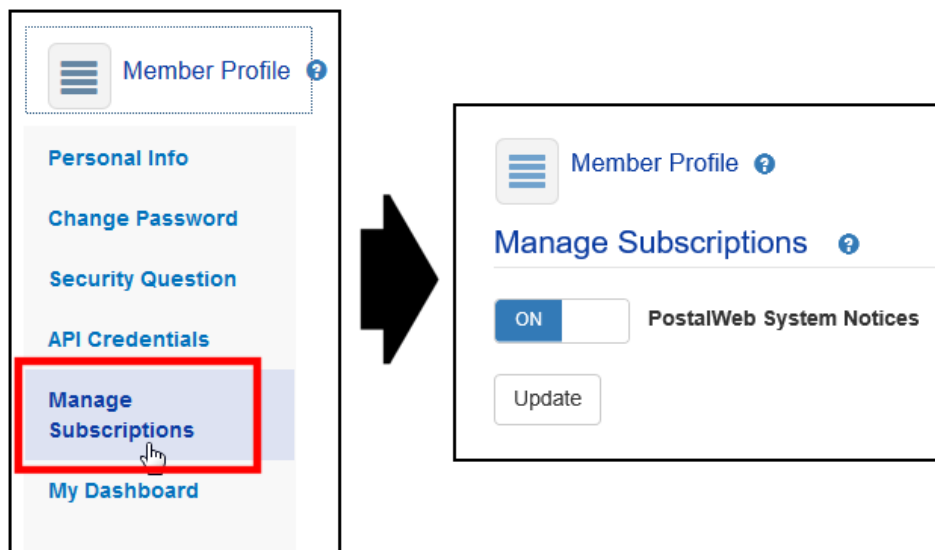
To access the 'API Key', click the **Show API Key** button.

! *Do NOT click the 'Generate New API Credentials' button!*

Manage Subscriptions

Role Access: ALL

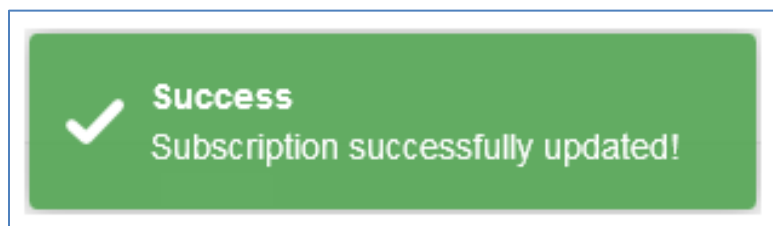
The 'Manage Subscriptions' section allows the user to manage subscriptions and notifications authorized for them by a site Administrator:



- **PostalWeb System Notices:** Allows the user to enable (set to '**ON**') or disable (set to '**OFF**') notices relating to their PostalWeb site's system status. This includes notifications via the [Notifications](#) screen within the 'My Dashboards' category and via email.

 Click the **button graphic** to toggle between '**ON**' () and '**OFF**' ()

After making the desired changes, click the **Update** button. A confirmation will display:



My Dashboard

Role Access: ALL

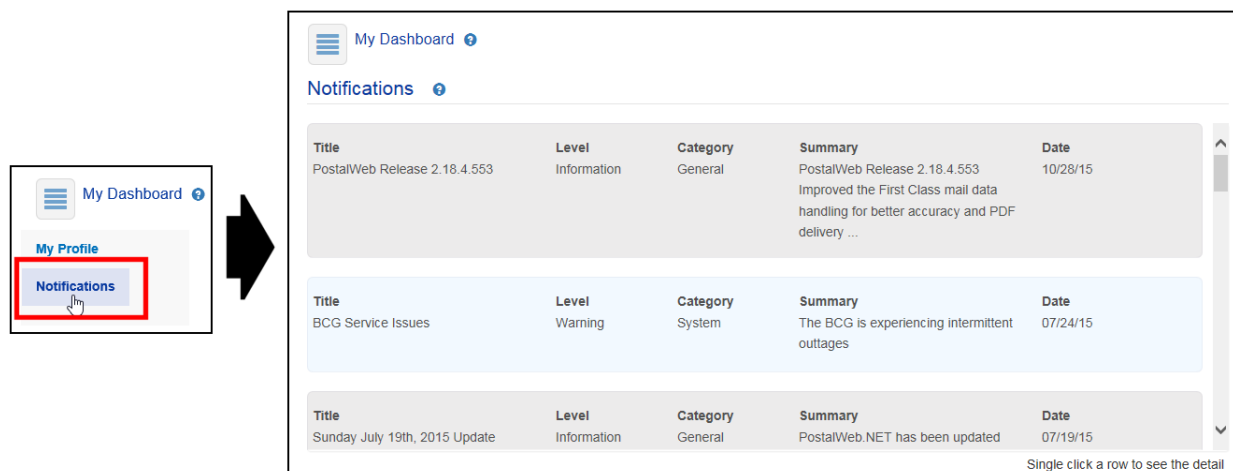
Navigates back to the original *My Dashboard* screen (refer to [My Dashboard](#) above):



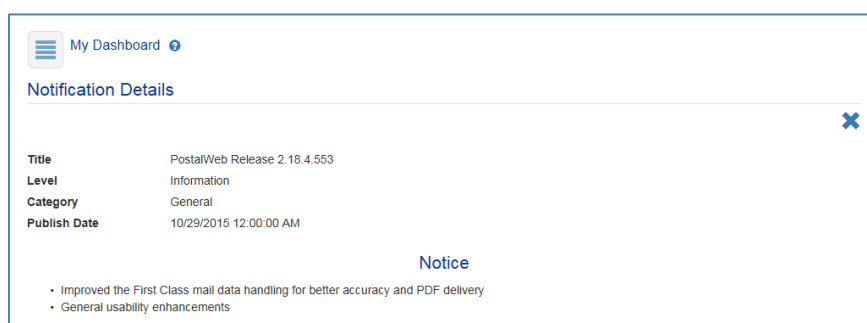
Notifications

Role Access: ALL

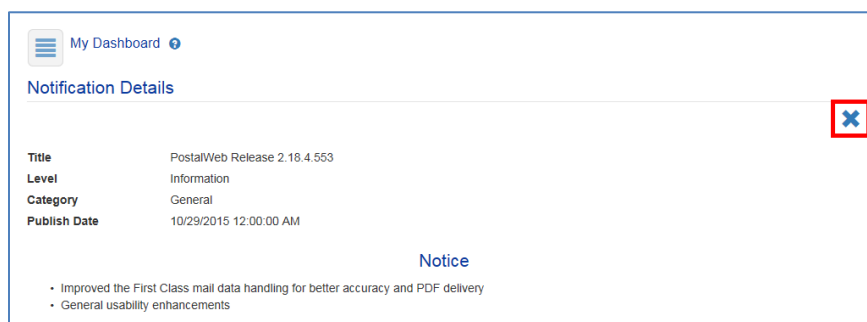
The *Notifications* screen shows a list of summaries of all the notifications to date:



Clicking any of the summary line item tiles displays a new screen containing the detail for that specific notification:



When finished viewing, click the cancel icon (✕) to go back to the main *Notification* screen:



Notifications will also be emailed to the 'Primary Email' address listed in the user's [Member Profile](#).

POSTAGE STATEMENTS

Role Access: ALL users with the 'Mail Owner' Application enabled (via the [Manage Users](#) page).



For users assigned an administrator role, the side menu of the 'Postage Statements' category is the same as the 'Mail Owner' category. Therefore, users assigned an administrator role should refer to the 'Mail Owner' category in this Guide.



The discussion in this section assumes the user has a non-administrator role.

Clicking the upper **Postage Statements** button immediately displays the *Postage Statements* page:

The screenshot shows the PostalWeb interface. At the top, there is a navigation bar with the PostalWeb logo, 'My Dashboard', and a 'Postage Statements' button highlighted with a red box. A large black arrow points down to the 'Postage Statements' page. The page has a 'Mail Owner' header and a 'Postage Statements' title. Below the title is a search bar with a 'Show' button. The main content area contains two tables of postage statements. The first table has a grey background and the second has a light blue background. Both tables have columns for Job ID/Job No, Location, Pieces/Postage, Paid/Mailed, and Mailer. Below each table is a 'Download' button and a 'PSID' value.

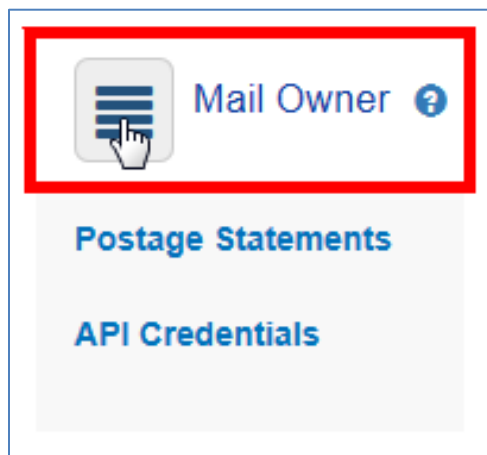
Job ID/Job No	Location	Pieces/Postage	Paid/Mailed	Mailer
00000521	Southern Division	216	05/05/15 10:45:00	WINDOW BOOK, INC.
00000521		112.97	05/04/15	

Download: PSID: 212415898 Permit: 55725

Job ID/Job No	Location	Pieces/Postage	Paid/Mailed	Mailer
00000517	Southern Division	216	04/16/15 5:36:00	WINDOW BOOK, INC.
00000517		100.19	04/15/15	

Download: PSID: 211123642 Permit: 55725

For non-administrator users, the following options are within the Postage Statements side menu:

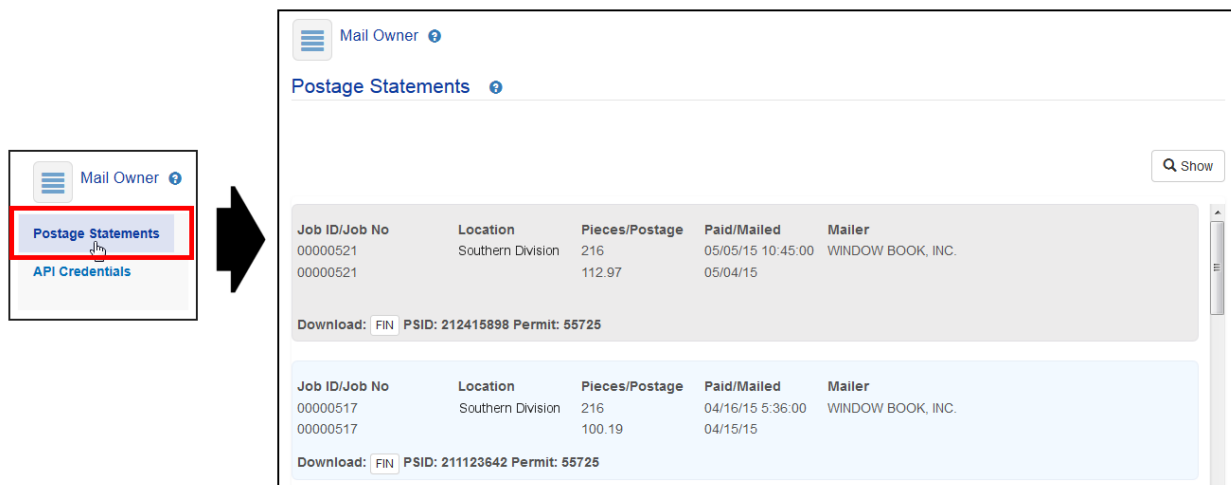


- [Postage Statements](#); and
- [API Credentials](#).

Postage Statements

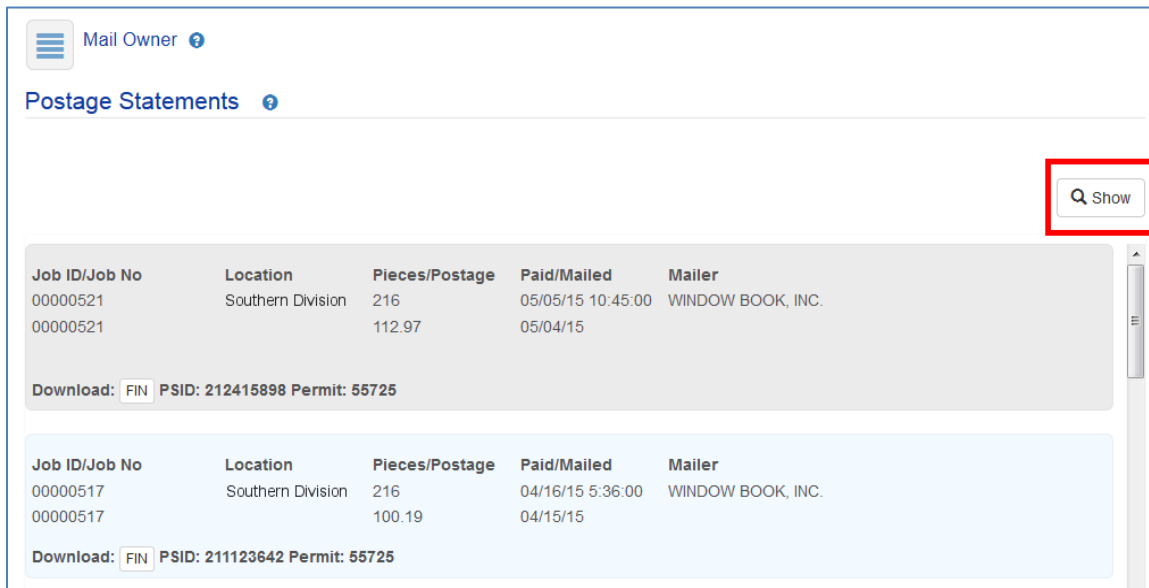
Role Access: ALL

The *Postage Statements* screen is displayed by selecting the 'Postage Statements' category from the upper menu or from the Mail Owner side menu:



The *Postage Statements* screen displays the postage statements that have been generated by *PostalOne!*. The screen displays postage statements based on the filter settings.

The postage statements shown in the list are selectively filtered. To display the possible filters, click the **Show** button:



Mail Owner ?

Postage Statements ?

Q Show

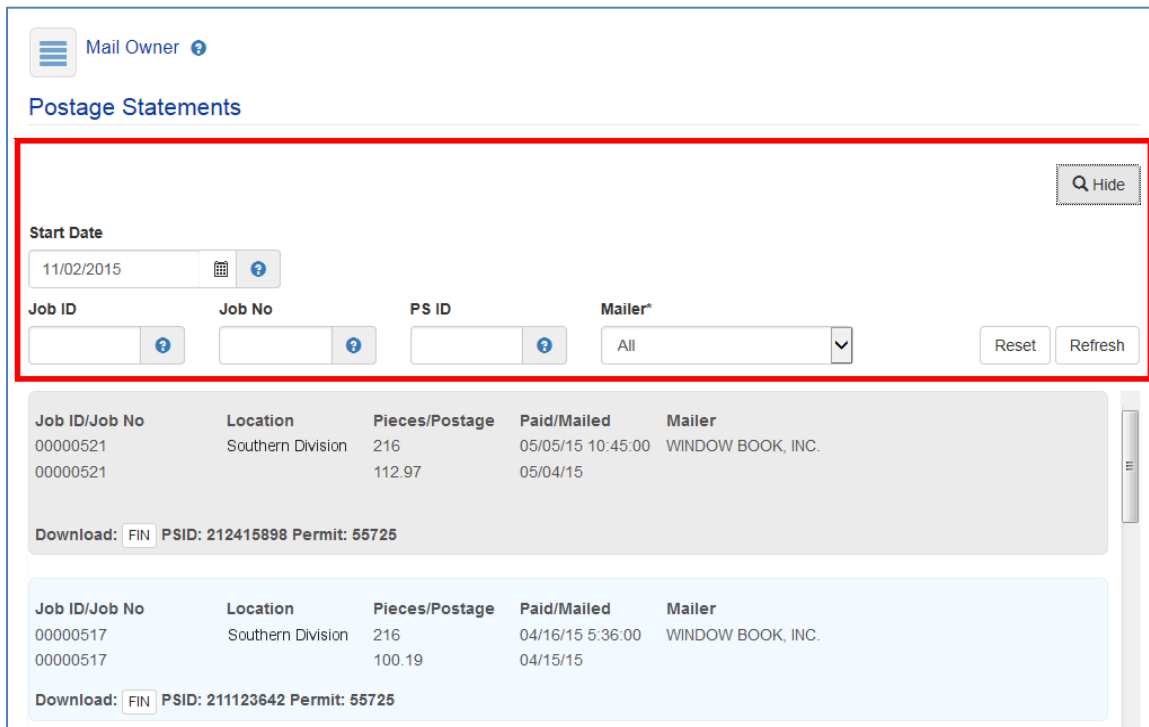
Job ID/Job No	Location	Pieces/Postage	Paid/Mailed	Mailer
00000521	Southern Division	216	05/05/15 10:45:00	WINDOW BOOK, INC.
00000521		112.97	05/04/15	

Download: FIN PSID: 212415898 Permit: 55725

Job ID/Job No	Location	Pieces/Postage	Paid/Mailed	Mailer
00000517	Southern Division	216	04/16/15 5:36:00	WINDOW BOOK, INC.
00000517		100.19	04/15/15	

Download: FIN PSID: 211123642 Permit: 55725

The following are the possible filters:



Mail Owner ?

Postage Statements

Q Hide

Start Date

11/02/2015

Job ID Job No PS ID Mailer*

Reset Refresh

Job ID/Job No	Location	Pieces/Postage	Paid/Mailed	Mailer
00000521	Southern Division	216	05/05/15 10:45:00	WINDOW BOOK, INC.
00000521		112.97	05/04/15	

Download: FIN PSID: 212415898 Permit: 55725

Job ID/Job No	Location	Pieces/Postage	Paid/Mailed	Mailer
00000517	Southern Division	216	04/16/15 5:36:00	WINDOW BOOK, INC.
00000517		100.19	04/15/15	

Download: FIN PSID: 211123642 Permit: 55725

- Start Date:** The date shown is the LAST date of the statements to be displayed (inclusive). Only statements with dates previous to the date shown will be displayed. Statements with dates after the date displayed will NOT be shown. This filter is not used if the Job ID, Job No or PS ID is used as a filter;



The Start Date value is limited to the previous 90 days.

- **Job ID:** Filters on a Job ID. Entering the entire Job ID string is not necessary; it is only necessary to enter as many leading characters as needed to filter the list as desired. Multiple statements may be displayed if the entire Job ID is not entered. The 'Start Date' is not used as a filter when this field is used;
- **Job No:** Filters on a Job No. Entering the entire Job No. string is not necessary; it is only necessary to enter as many leading characters as needed to filter the list as desired. Multiple statements may be displayed if the entire Job No is not entered. The 'Start Date' is not used as a filter when this field is used;



Any leading zeros must also be entered.

- **PS ID:** Filters on a 'Postage Statement Identification' number (PS ID). Entering the entire PS ID string is not necessary; it is only necessary to enter as many leading characters as needed to filter the list as desired. Multiple statements may be displayed if the entire PS ID is not entered. The 'Start Date' is not used as a filter when this field is used;
- **Mailer*:** This filter is always used. It can be used to select either a single mailer or all mailers within the PostalWeb mailer database associated with the mail owner.



Any time a filter is changed, the 'Refresh' button must be clicked to update the displayed jobs. The 'Refresh' button will turn blue in color when the displayed data is stale and the 'Refresh' button needs to be clicked.

The items listed for each individual postage statement are as follows:

Mail Owner ?

Postage Statements

Hide

Start Date
11/02/2015

Job ID Job No PS ID Mailer*
All


Reset Refresh

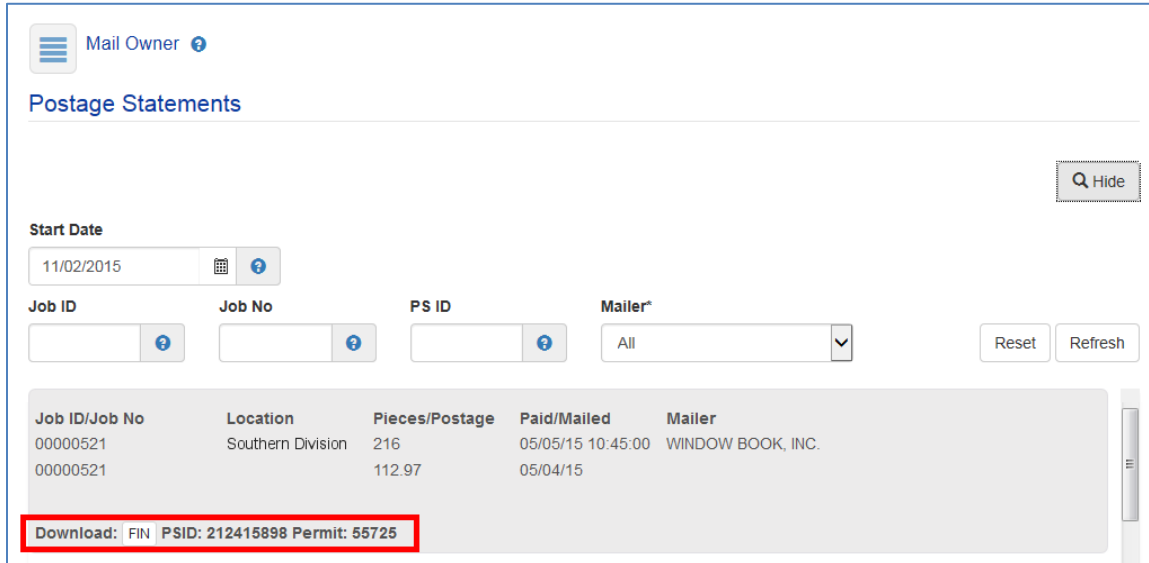
Job ID/Job No	Location	Pieces/Postage	Paid/Mailed	Mailer
00000521	Southern Division	216	05/05/15 10:45:00	WINDOW BOOK, INC.
00000521		112.97	05/04/15	

Download: FIN PSID: 212415898 Permit: 55725

- **Job ID/Job No.:** The Job ID and Job No. associated with this postage statement;
- **Location:** The location where the submission originated from;
- **Pieces/Postage:** The number of pieces mailed / the amount of postage paid;
- **Paid/Mailed:** The date and time payment of postage was made / date the pieces were mailed;


- **Mailer:** The name of the mailer.


To view or download a PDF version of a specific postage statement, click the corresponding **FIN** button (). Clicking the **FIN** button will download the postage statement as a PDF file or display the document in the browser, providing the browser has a PDF reader installed as a plug-in. Also displayed is the associated Postage Statement ID (PS ID) as well as the permit number:







Mail Owner ?

Postage Statements



Start Date
11/02/2015  ?

Job ID  **Job No**  **PS ID**  **Mailer**
All  **Reset** **Refresh**

Job ID/Job No	Location	Pieces/Postage	Paid/Mailed	Mailer
00000521	Southern Division	216	05/05/15 10:45:00	WINDOW BOOK, INC.
00000521		112.97	05/04/15	

Download: **FIN** **PSID:** 212415898 **Permit:** 55725

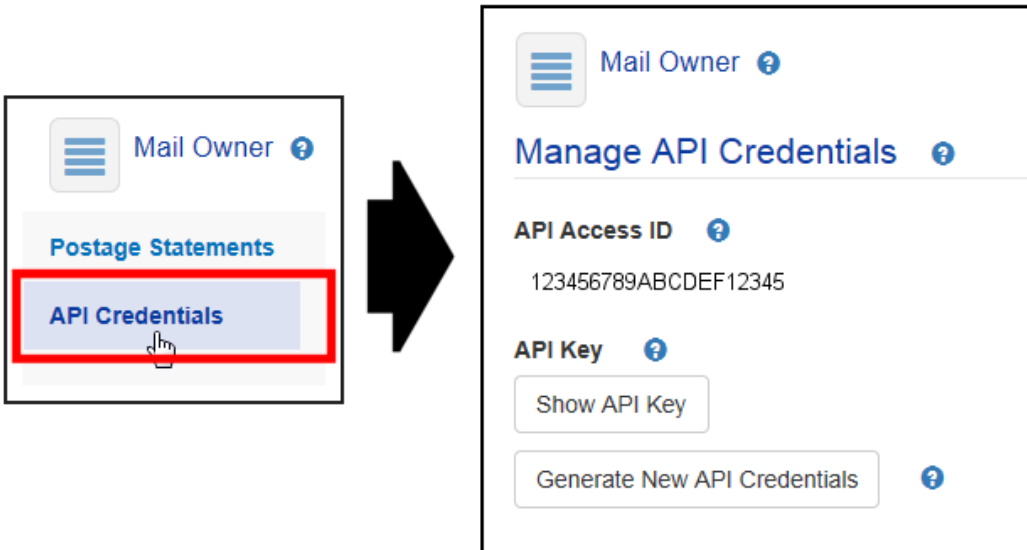


The postage statement is in the form of a standard USPS Form 3602-R.

API Credentials

Role Access: ALL

Allows the user to view their API Credentials.



To access the 'API Key', click the **Show API Key** button.




Do NOT click the 'Generate New API Credentials' button!

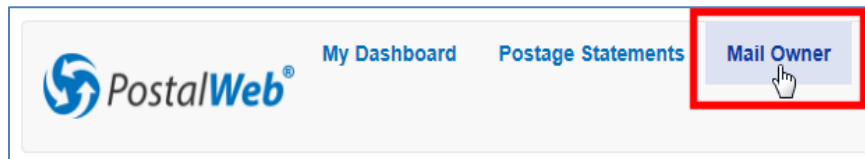
MAIL OWNER

Role Access: Administrator (see “Info” icon note below)

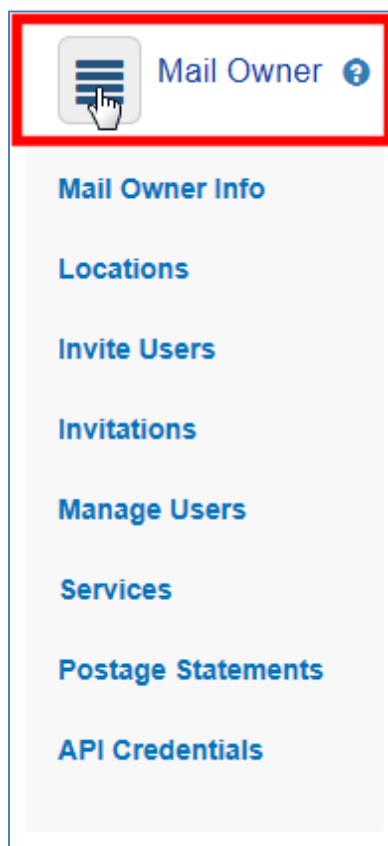
This category is generally for the management and maintenance of the overall PostalWeb site.

 ***The ‘Mail Owner’ top menu option will only appear if the user has Administrator rights.***

Click the ‘Mail Owner’ item on the top menu:



Clicking the ‘Mail Owner’ side menu icon exposes the side menu contents:



Within the 'Mail Owner' side menu are the following options:

- [Mail Owner Info](#);
- [Locations](#);
- [Invite Users](#);
- [Invitations](#);
- [Manage Users](#);
- [Services](#);
- [Postage Statements](#); and
- [API Credentials](#).

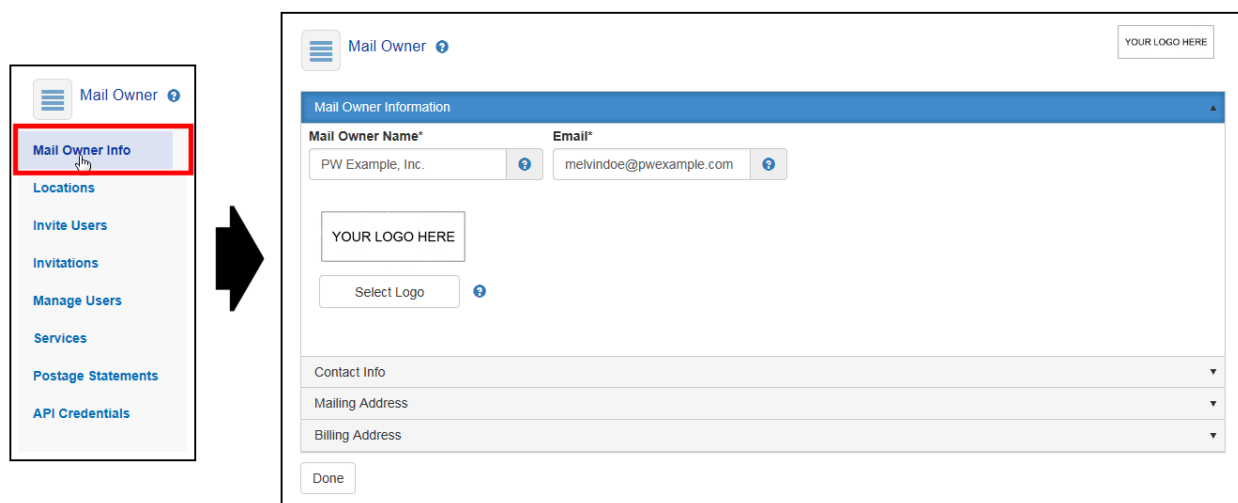
Mail Owner Info

Role Access: Administrator

The *Mail Owner Info* option allows the Administrator to edit the information associated with the company registered with PostalWeb.

Mail Owner Information

Either clicking on the 'Mail Owner' top menu item or selecting the 'Mail Owner Info' side menu option will display the *Mail Owner Information* screen:



- **Mail Owner Name*:** The company name of the mail owner;
- **Email*:** Preferably the email address of someone high up in the company that can be contacted should the main Administrator be unavailable;
- **Select Logo button:** An image file with a mail owner's company logo can be uploaded here. If uploaded, the logo will appear on the mail owner's PostalWeb site, email notifications, etc. to brand it as the mail owner's site.

To upload a company logo image file, perform the following:

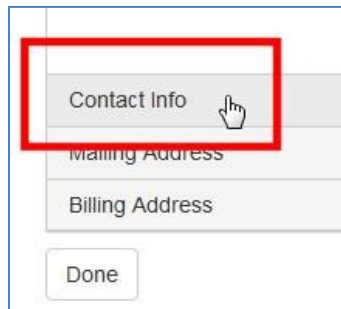
1. Click the **Select Logo** button;
2. A file manager screen will display;
3. Locate the image file to be uploaded;
4. Select the image file and click the **Open** button;
5. PostalWeb will upload the file, automatically re-size and display it.



Supported file types include: .png; .jpg; .jpeg; .gif; and .bmp.

Contact Info

To display the *Contact Info* screen, place the mouse cursor on the rectangle that contains the 'Contact Info' text and click it:



After clicking the 'Contact Info' text, a new page will open to display the items on the *Contact Info* screen:

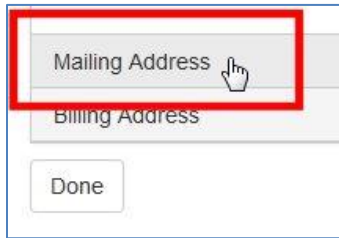
A screenshot of the 'Contact Info' page. At the top left is a 'Mail Owner' header with a menu icon and a help icon. Below this is a section titled 'Mail Owner Information' with a dropdown arrow. Underneath, 'Contact Info' is selected and highlighted in blue. The page contains three input fields: 'Primary Phone' with the value '(123) 555-1212', 'Other Phone' with the placeholder 'Other Phone', and 'Fax' with the value '(123) 555-1222'. Below these are 'Mailing Address' and 'Billing Address' sections, each with a dropdown arrow. A 'Done' button is at the bottom left.

The *Contact Info* page contains the following:

- **Primary Phone:** The primary company phone;
- **Other Phone:** Any other pertinent phone number; and
- **Fax:** The company fax number.

Mailing Address

To display the *Mailing Address* page, place the mouse cursor on the rectangle that contains the 'Mailing Address' text and click it:



After clicking the 'Mailing Address' text, a new page will open to display the items on the *Mailing Address* screen:

A screenshot of the 'Mailing Address' screen in the PostalWeb interface. The screen has a header with a 'Mail Owner' link and a hamburger menu icon. Below the header are three expandable sections: 'Mail Owner Information', 'Contact Info', and 'Mailing Address' (which is currently expanded). The 'Mailing Address' section contains a 'Country' dropdown menu set to 'United States'. Below this are three rows of input fields: 'Line 1*' (containing '300 Franklin St.'), 'Line 2' (containing 'Line 2'), and 'City*' (containing 'Cambridge'). Below these are three more input fields: 'State*' (a dropdown menu set to 'MA'), 'Zip Code*' (containing '02139'), and 'zip+4' (containing '3781'). At the bottom of the section is a toggle switch labeled 'ON' and the text 'Mailing & Billing are the same*' with a help icon. Below the 'Mailing Address' section is a 'Billing Address' section, which is currently collapsed. At the very bottom of the screen is a 'Done' button.

The address to be entered on this page should be the main address of the company's corporate headquarters if the company has more than one location.

The *Mailing Address* page contains the following:

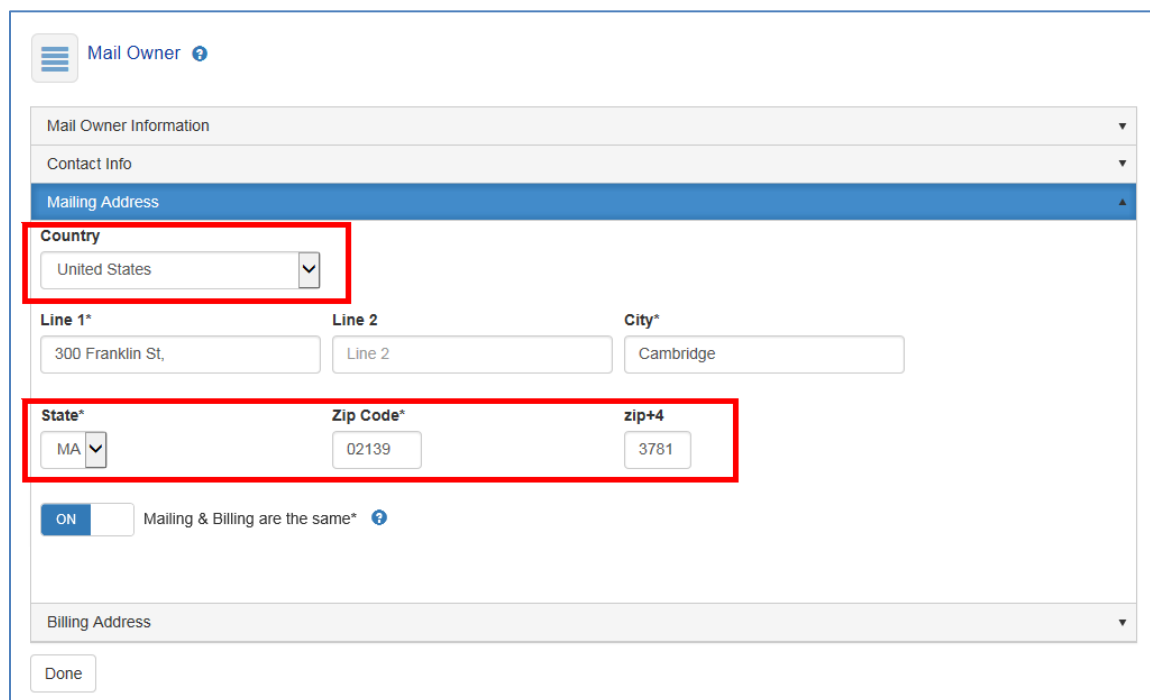
- **Country:** Select the country the mail owner resides in using the pull-down menu; either 'United States' or 'Canada'. This selection changes the display of some of the other entries noted below;
- **Line 1*:** Street address of the mail owner's corporate headquarters;
- **Line 2:** Secondary street address, if necessary;
- **City*:** The city of the mail owner's corporate headquarters;

- **Mailing & Billing are the same*:** If the mailing and billing address are the same, set to 'ON'. The mailing information entered on this screen will be copied to the *Billing Address* screen (refer to [Billing Address](#)).



Click the button graphic to toggle between 'ON' () and 'OFF' ()

If the country selected earlier is 'United States', the following fields are displayed:



Mail Owner

Mail Owner Information

Contact Info

Mailing Address

Country

United States

Line 1*

300 Franklin St,

Line 2

Line 2

City*

Cambridge

State*

MA

Zip Code*

02139

zip+4

3781

ON Mailing & Billing are the same*

Billing Address

Done

- **State*:** Select the State from the pull-down menu.
- **ZIP Code*:** The base 5-digit ZIP Code of the company location;
- **zip+4:** The extended ZIP+4 code. Must be 4 digits long.

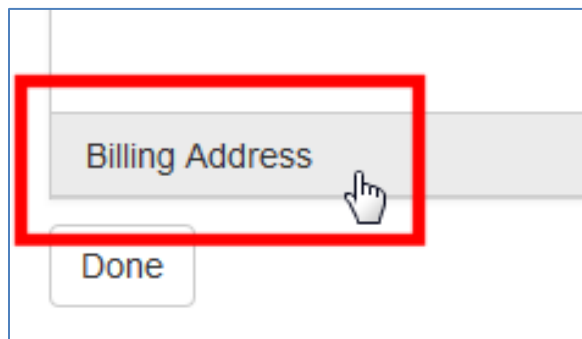
If the country selected earlier is 'Canada', the following fields are displayed:

The screenshot shows the 'Mail Owner' form with the 'Mailing Address' section expanded. The 'Country' dropdown is set to 'United States'. The 'Line 1' field contains '300 Franklin St.', 'Line 2' contains 'Line 2', and 'City*' contains 'Cambridge'. The 'State*' dropdown is set to 'MA', 'Zip Code*' is '02139', and 'zip+4' is '3781'. Below these fields is a checkbox labeled 'ON' for 'Mailing & Billing are the same*'. The 'Billing Address' section is collapsed. A 'Done' button is at the bottom.

- **Province*:** Select the Canadian province the mail owner resides in from the pull-down menu selection;
- **Postal Code*:** The Canadian postal code the mail owner resides in.

Billing Address

To display the *Billing Address* page, place the mouse cursor on the rectangle that contains the 'Billing Address' text and click it:



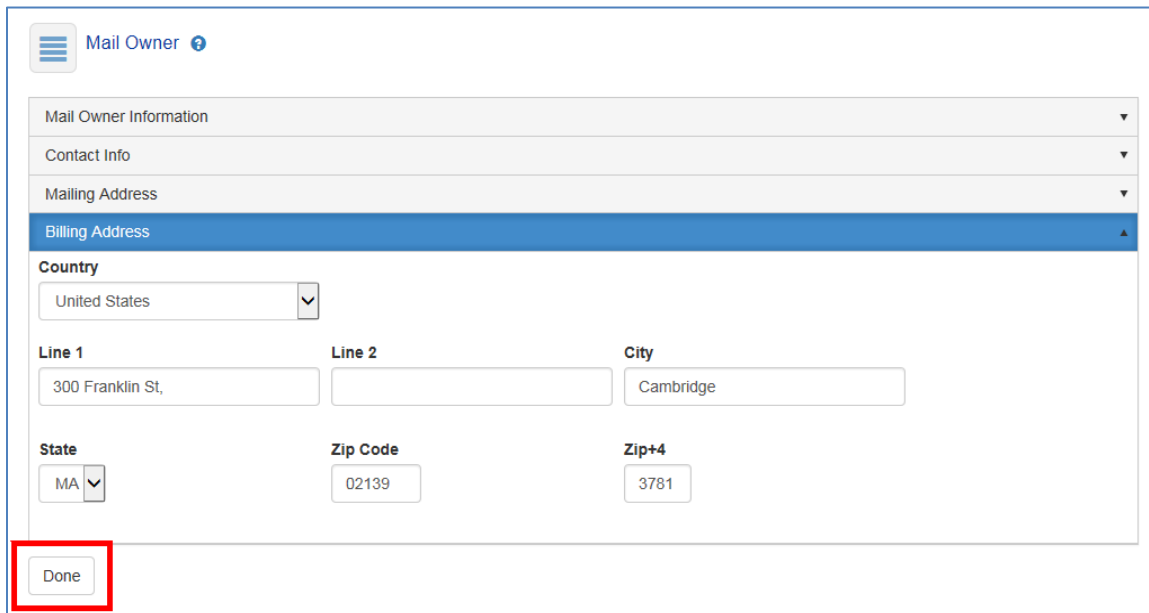
i If the option 'Mailing & Billing are the same' located within the [Mailing Address](#) section of the screen is set to 'ON', the required fields for the Billing Address will already be populated with the required information.

After clicking the 'Billing Address' text, a new page will open to display the items on the *Billing Address* screen:

- **Line 1, Line 2, City; State and ZIP Code (for US) or Province and Postal Code (for Canada):** The company address to send billings to.

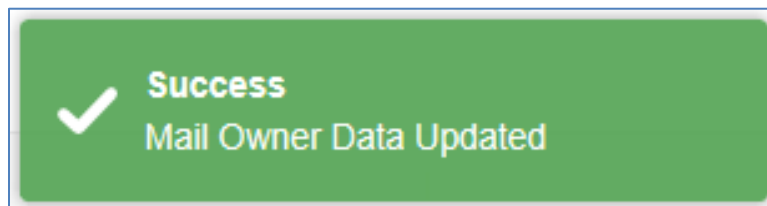
i When changing the Billing Address, make sure the 'Mailing & Billing are the same' option located on the 'Mailing Address' screen is set to 'OFF'.


When all items have been entered or edited in the *Mail Owner Information* screens, the user must click the **Done** button for the changes to take effect:



The screenshot shows the 'Mail Owner' interface. At the top, there's a header with a menu icon and the text 'Mail Owner'. Below this is a list of tabs: 'Mail Owner Information', 'Contact Info', 'Mailing Address', and 'Billing Address'. The 'Billing Address' tab is currently selected and highlighted in blue. Under this tab, there are several input fields: 'Country' (a dropdown menu showing 'United States'), 'Line 1' (text input with '300 Franklin St,'), 'Line 2' (empty text input), 'City' (text input with 'Cambridge'), 'State' (a dropdown menu showing 'MA'), 'Zip Code' (text input with '02139'), and 'Zip+4' (text input with '3781'). At the bottom left of the form, there is a 'Done' button, which is highlighted with a red rectangular box.

A confirmation will display:



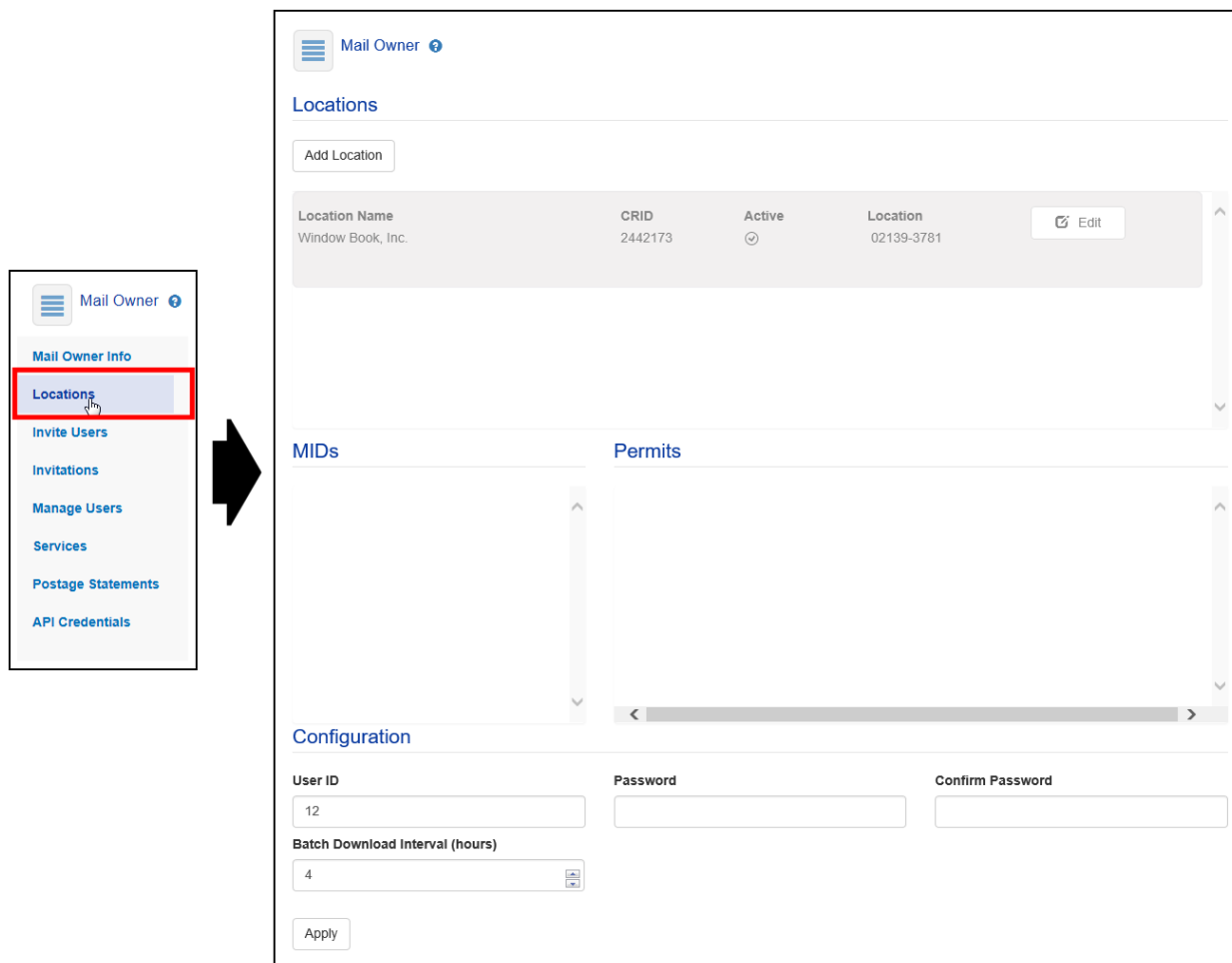
 ***Navigating away from the 'Mail Owner Information' screens without first clicking the 'Done' button will cancel any changes that have been made.***

Locations

Role Access: Administrator

The *Locations* screen allows the setup and maintenance of different mail owner locations.

To display the *Locations* screen select the 'Locations' option on the side menu:

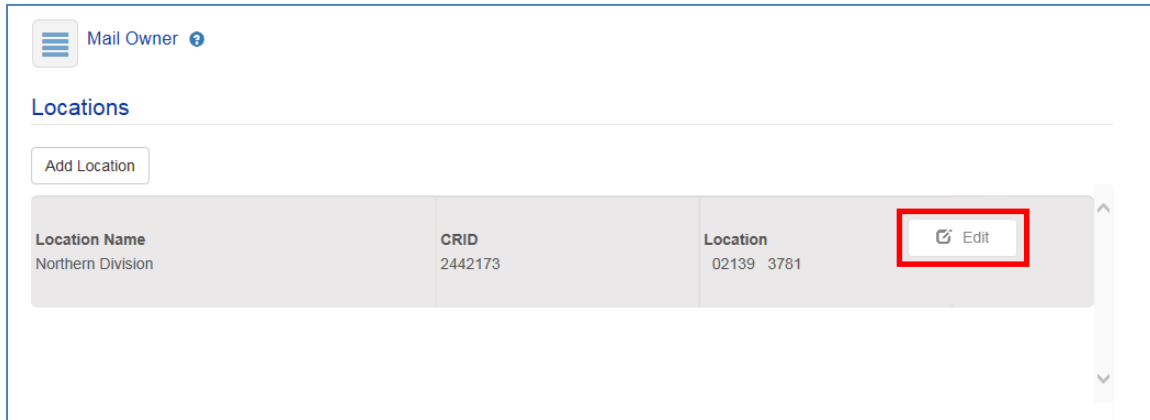


The *Locations* screen shows a list of the known locations, known MIDs and permit numbers for the mail owner, based on a combination of previous postage statements flowing through PostalWeb, and the mail service provider's activities on PostalWeb.

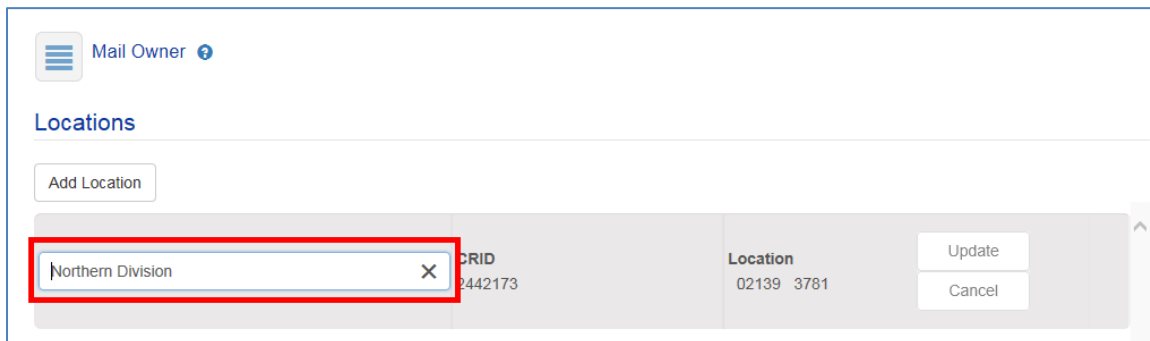
The 'Configuration' section allows the user to initiate statement and other data collection for the past 88 days to be displayed and delivered (if the associated delivery services are subscribed to via the [Services](#) page).

Location Name Edit

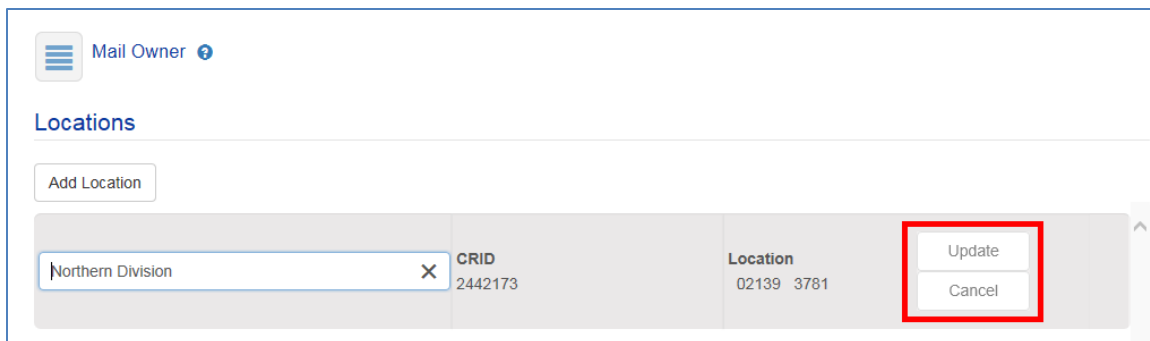
The 'Location Name' may be changed by clicking the **Edit** button on the colored strip of the location to be changed:



The name of the location can then be edited as desired:

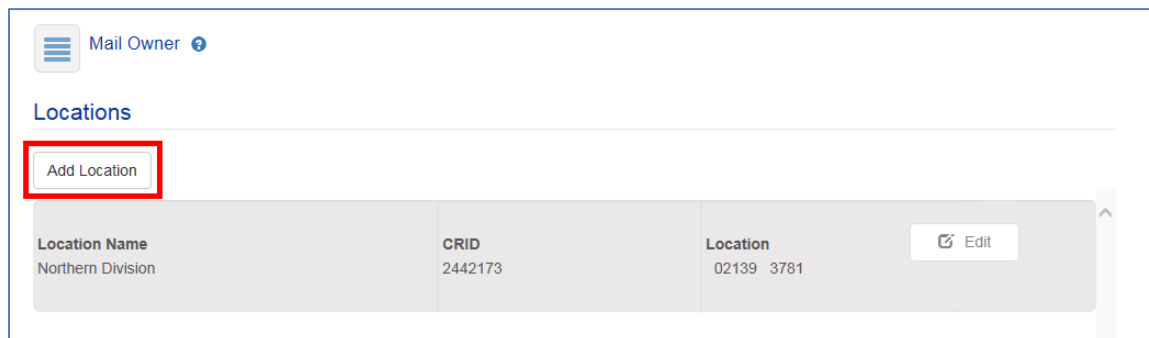


After editing is complete, the **Update** button must be clicked to implement the change. Clicking the **Cancel** button or navigating away from the *Locations* screen before the **Update** button is clicked will cancel any changes made:



Add a Location

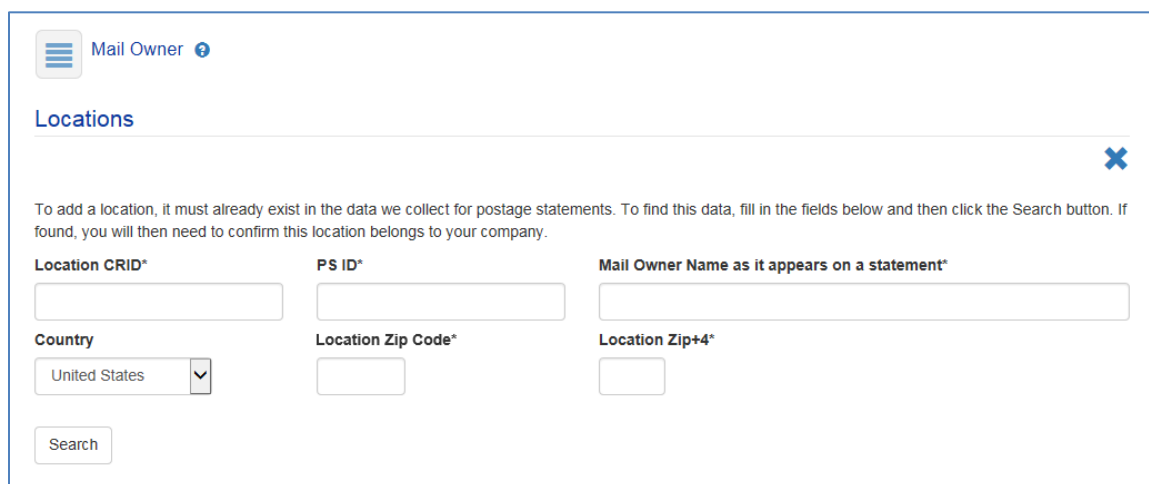
A new location may be added by clicking the **Add Location** button:



The screenshot shows the 'Mail Owner' header with a menu icon. Below it is the 'Locations' section. A red box highlights the 'Add Location' button. Below the button is a table with the following data:

Location Name	CRID	Location	
Northern Division	2442173	02139 3781	Edit

A new screen will display:



The screenshot shows the 'Mail Owner' header with a menu icon. Below it is the 'Locations' section. A blue 'X' icon is in the top right corner. Below the icon is a text box with the following text:

To add a location, it must already exist in the data we collect for postage statements. To find this data, fill in the fields below and then click the Search button. If found, you will then need to confirm this location belongs to your company.

The form contains the following fields:

- Location CRID***: Text input field
- PS ID***: Text input field
- Mail Owner Name as it appears on a statement***: Text input field
- Country**: Dropdown menu with 'United States' selected
- Location Zip Code***: Text input field
- Location Zip+4***: Text input field
- Search**: Button

Carefully enter all required information (required fields are denoted with an asterisk '*'):

- **Location CRID***: The CRID assigned by the USPS to this location;
- **PS ID***: The Postage Statement ID (PS ID) of a recent postage statement;
- **Mail Owner Name as it appears on a statement***: For a successful search, the Mail Owner's name must be entered *exactly* as it appears on a postage statement, including all punctuation;
- **Country**: The country of the location;

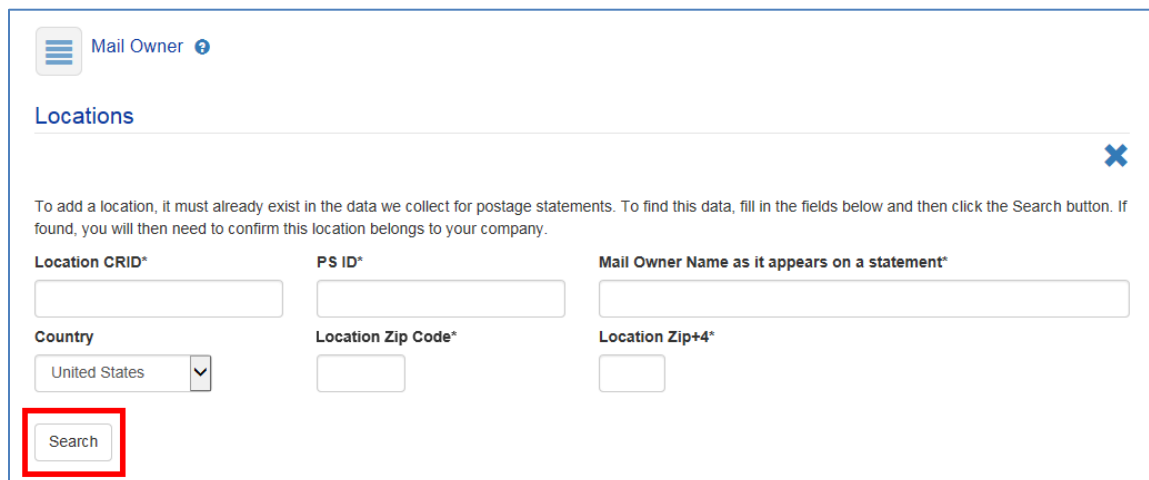
If the country selected is 'United States':

- **Location Zip Code* and Location Zip+4***: The ZIP Code of the location as it appears on the postage statements that is associated with the Location CRID;

If the country selected is 'Canada':

- **Postal Code***: The Canadian postal code associated with the location.

When the entries are complete, click the **Search** button:



Mail Owner ⓘ

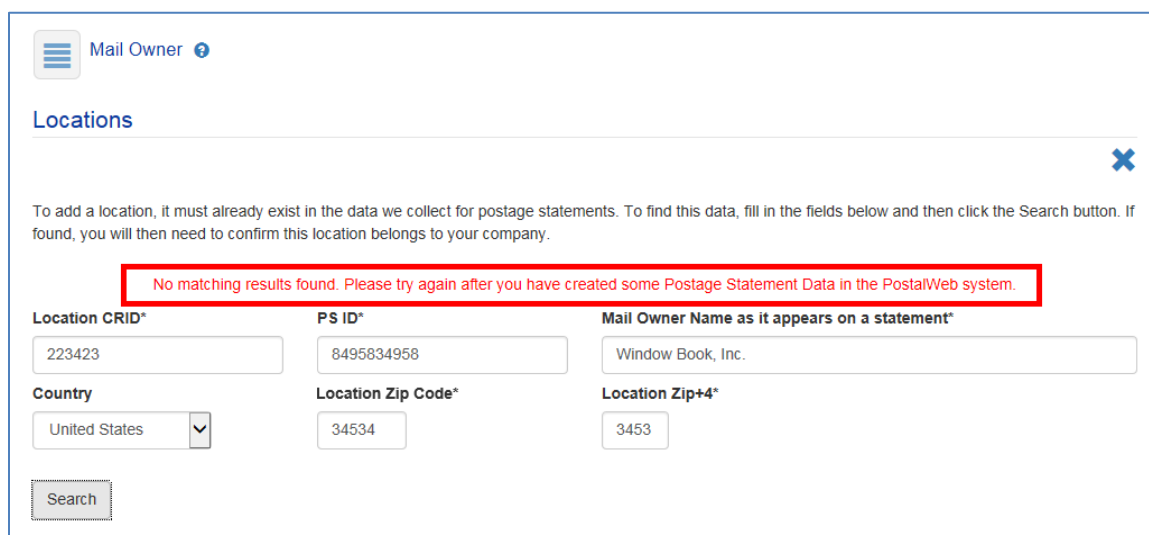
Locations

To add a location, it must already exist in the data we collect for postage statements. To find this data, fill in the fields below and then click the Search button. If found, you will then need to confirm this location belongs to your company.

Location CRID*	PS ID*	Mail Owner Name as it appears on a statement*
<input type="text"/>	<input type="text"/>	<input type="text"/>
Country	Location Zip Code*	Location Zip+4*
<input type="text" value="United States"/>	<input type="text"/>	<input type="text"/>

Search

The PostalWeb database will be searched to find a match. If no match is found, an error message will display:



Mail Owner ⓘ

Locations

To add a location, it must already exist in the data we collect for postage statements. To find this data, fill in the fields below and then click the Search button. If found, you will then need to confirm this location belongs to your company.

No matching results found. Please try again after you have created some Postage Statement Data in the PostalWeb system.



Location CRID*	PS ID*	Mail Owner Name as it appears on a statement*
<input type="text" value="223423"/>	<input type="text" value="8495834958"/>	<input type="text" value="Window Book, Inc."/>
Country	Location Zip Code*	Location Zip+4*
<input type="text" value="United States"/>	<input type="text" value="34534"/>	<input type="text" value="3453"/>

Search

In this case, inspect the entries made and make any corrections needed. If any corrections are made, click the **Search** button again to attempt a match. If the information entered is known to be valid and the 'No matching results found' error repeats, then there is no record of this location in PostalWeb's database, and a new location cannot be generated.



MIDs and Permit Numbers

The known MIDs and permit numbers are displayed, based on statements and data collected by PostalWeb:

 Mail Owner 

Locations

Add Location

Location Name	CRID	Active	Location	 Edit
Window Book, Inc.	2442173		02139-3781	

MIDs

Permits

Configuration

User ID

12

Password

Confirm Password

Batch Download Interval (hours)

4

Apply

PostalOne! Data Collection Configuration

The past 88 days of statements, as well as, future statements and associated data may be collected from *PostalOne!* by configuring the data collection 'Configuration' section:

The screenshot displays the 'Mail Owner' interface. At the top, there is a 'Locations' section with an 'Add Location' button and a table listing locations. Below this are 'MIDs' and 'Permits' sections, both currently empty. The 'Configuration' section at the bottom is highlighted with a red rectangular box. It contains the following fields:

Location Name	CRID	Active	Location	
Window Book, Inc.	2442173	✓	02139-3781	Edit

Configuration

User ID:

Password:

Confirm Password:

Batch Download Interval (hours):

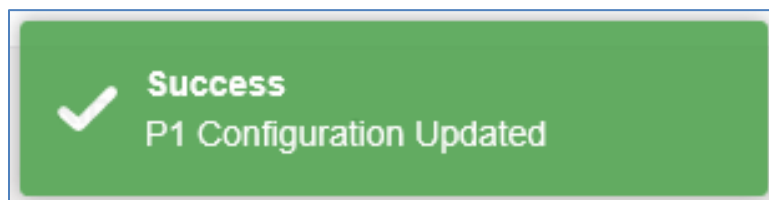
- **User ID, Password and Confirm Password:** The user's *PostalOne!* logon credentials must be entered to initiate data collection from *PostalOne!*. The collected data will be displayed on the PostalWeb site and delivered to the user as attachments via emails if the associated delivery service(s) is/are subscribed to;
- **Batch Download Interval (hours):** The time interval in hours that data will attempt to be collected from *PostalOne!*. The range is 4-24 hours.

Locations Screen Complete

When the modifications to the *Locations* screen is complete, click the **Apply** button located near the bottom of the screen:

The screenshot displays the 'Locations' screen for a 'Mail Owner'. At the top, there is a header with a menu icon and the text 'Mail Owner'. Below this is the 'Locations' section, which includes an 'Add Location' button and a table of locations. The table has columns for 'Location Name', 'CRID', 'Active', and 'Location'. One location is listed: 'Window Book, Inc.' with CRID '2442173', Active status 'Yes', and Location '02139-3781'. An 'Edit' button is next to the location. Below the table are two empty sections for 'MIDs' and 'Permits'. At the bottom is the 'Configuration' section, which contains fields for 'User ID' (12), 'Password', 'Confirm Password', and 'Batch Download Interval (hours)' (4). The 'Apply' button is highlighted with a red box.

A confirmation will display:



Navigating away from the 'Locations' screen without first clicking the 'Apply' button will cancel any changes that have been made.

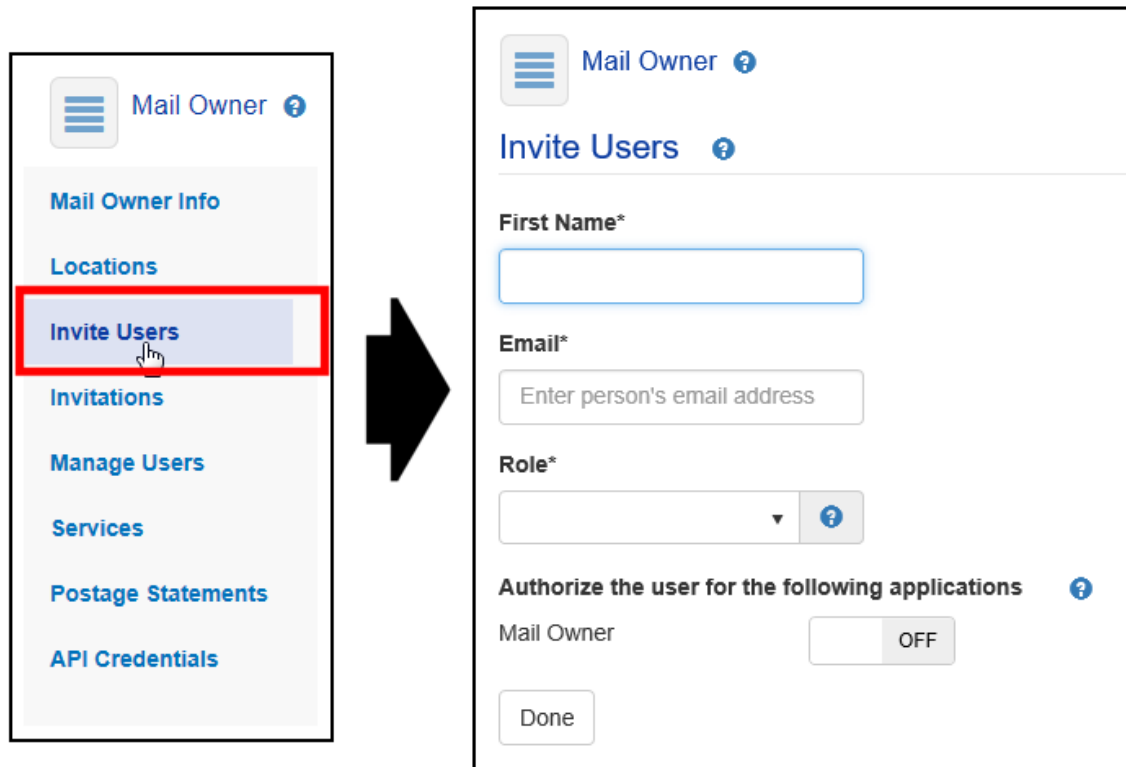
Invite Users

Role Access: Administrator

Inviting users is the first step in bringing new users on-board to use PostalWeb. The invitation is in the form of an email to the prospective user. The email contains a link which the prospective user must click on. Doing so will open a new web page that includes an application the new user must complete before being allowed to log in to their company's PostalWeb site. At the same time an email will be sent to the person making the invitation to advise that the invitation has been accepted by the invitee.

The person initiating the invitation must know the new user's email address.

To display the *Invite Users* screen select the 'Invite Users' option on the side menu:



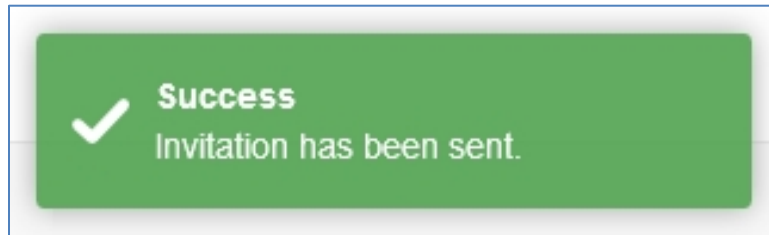
To invite a new user, enter the following:

- **First Name*:** The first name of the individual being invited;
- **Email*:** The email address of the user being invited. This is where the invitation will be sent;
- **Role:** Select the desired role from the pull down list. For list of the roles and their descriptions, please refer to the [ROLES](#) section in this Guide;
- **Authorize the user for the following applications:**
 - **Mail Owner:** Set this option to 'ON' to authorize the invited person to receive subscription services.



Click the button graphic to toggle between 'ON' () and 'OFF' ().

When the invitation is complete, click the **Done** button. A confirmation will display:



The invitation will be displayed on the invitation list located in the [Invitations](#) sub-category.



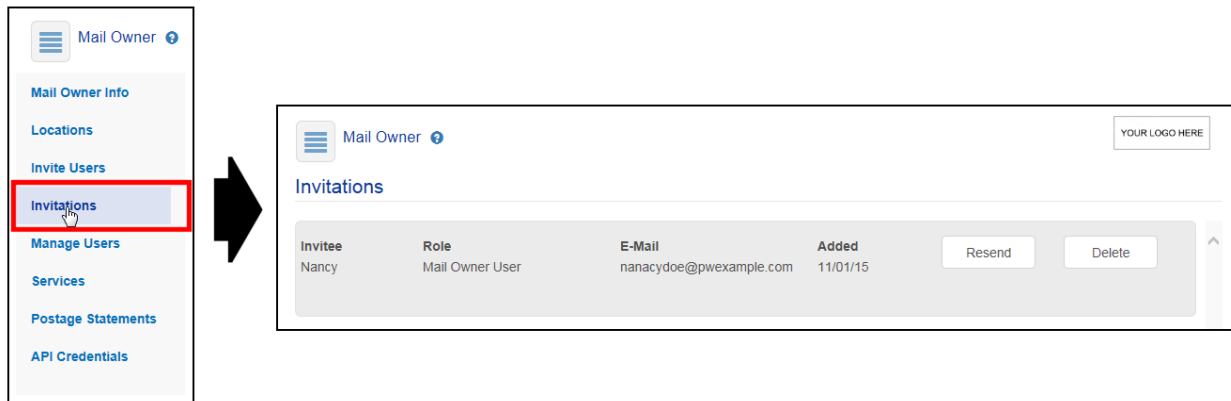
A detailed description of the invitation process is located in the "PostalWeb for Mail Owners Setup Guide", specifically the 'Inviting Additional Users' section. The "PostalWeb for Mail Owners Setup Guide" is available on Window Book's web site at: <https://www.windowbook.com/Support/UserGuides>. Registration is required.

Invitations

Role Access: Administrator

Initiating an invitation generates an email to the potential new user. When the email invitation is sent, the invitation is also added to the list of invitations in PostalWeb that are waiting to be replied to. Any invitations that have been sent but not responded to are listed here.

To see the list of invitations, select the 'Invitation' menu option from the Mail Owner side menu:



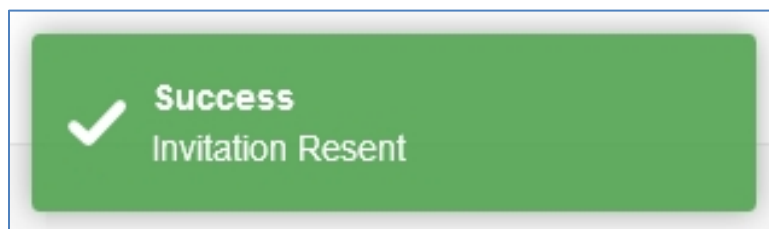
Each line item shows:

Invitee	Role	Email	Added	Resend	Delete
Nancy	Mail Owner User	nanacydoe@pwexample.com	11/01/15		

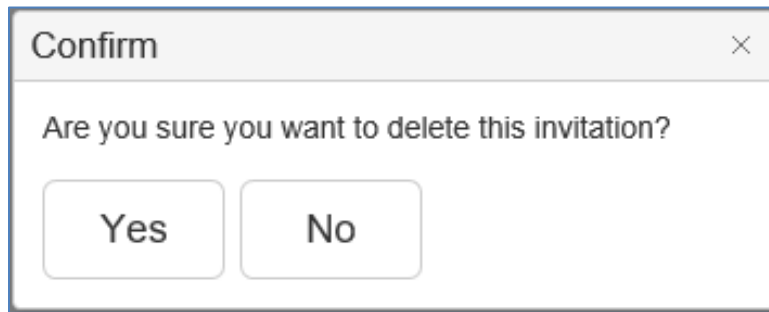
- **Invitee:** The first name of the invitee;
- **Role:** The Role assigned at the time the invitation was made;
- **Email:** The email address the invitation was sent to;
- **Added:** The date the invitation was sent.

Each line item has a **Resend** button and a **Delete** button.

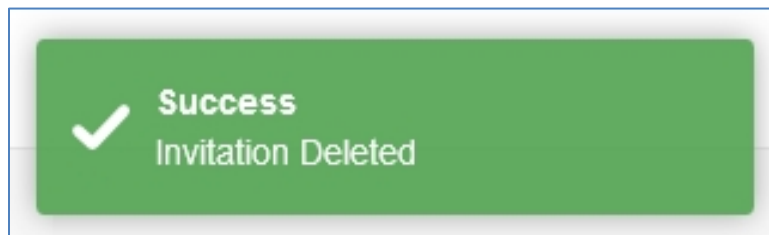
If the **Resend** button is clicked, the invitation email is sent again to the same email address, and a confirmation is shown:



If the **Delete** button is clicked, a confirmation box is displayed to confirm the user wishes to delete the invitation:



If the **No** button is clicked the deletion process will be aborted and the invitation will not be affected. If the **Yes** button is clicked, the invitation will be deleted and a confirmation message will display:

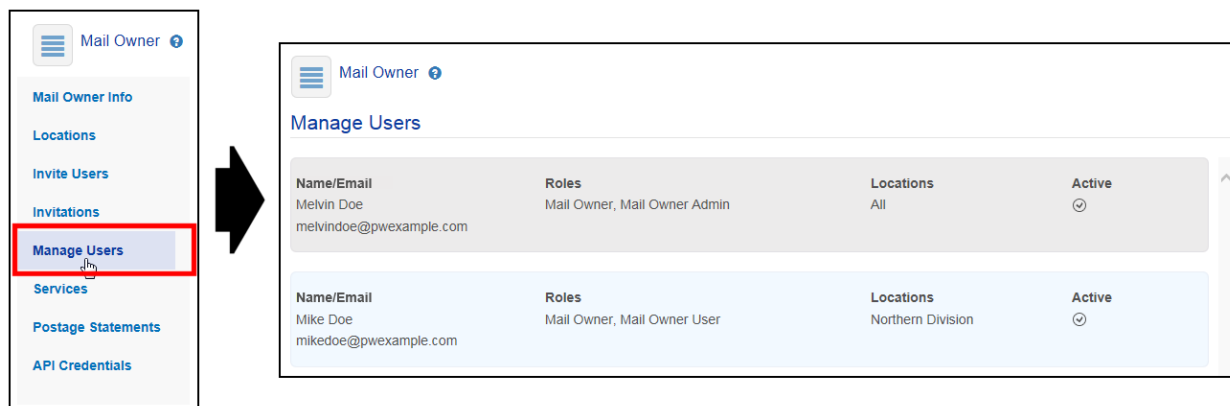


i *When the invitation is 'accepted' by the email recipient clicking the link provided, the invitation listing in 'Invitations' is removed and an email is sent to the person who made the invitation, indicating the acceptance.*

Manage Users

Role Access: Administrator

The *Manage Users* screen allows the assignment or re-assignment of roles, locations, or any services that have been subscribed to. To see a list of the available Users select the 'Manage Users' option from the Mail Owner side menu:

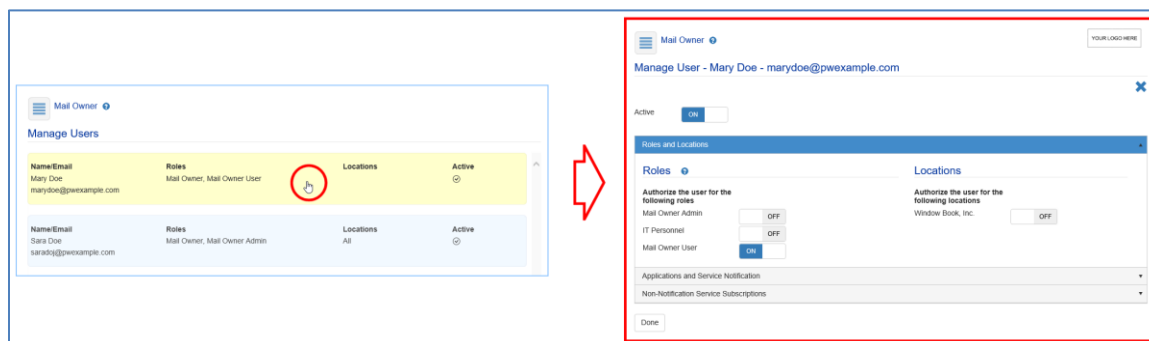


Each user's line item shows:

Name/Email	Roles	Locations	Active
Melvin Doe melvindoe@pwexample.com	Mail Owner, Mail Owner Admin	All	✓

- **Name/Email:** The name and email address as listed in the user's 'Member Profile';
- **Roles:** The current role(s) assigned;
- **Locations:** The current location(s) assigned;
- **Active:** Whether the user is currently active (✓) or inactive (✗).

The details of each user's settings can be viewed by single-clicking anywhere on the colored background of that user's line item:



The detail screen shows all settings available for the user that was selected:

Mail Owner ? YOUR LOGO HERE

Manage User - Mary Doe - marydoe@pwexample.com

Active ☒ ON

Roles and Locations

Roles ?

Authorize the user for the following roles

Mail Owner Admin	<input type="checkbox"/> OFF
IT Personnel	<input type="checkbox"/> OFF
Mail Owner User	<input checked="" type="checkbox"/> ON

Locations

Authorize the user for the following locations

Window Book, Inc.	<input type="checkbox"/> OFF
-------------------	------------------------------

Applications and Service Notification ▼

Non-Notification Service Subscriptions ▼

Done

Selections on the detail screen include the following:

- **Active*:** This can be set to be either active ('ON') or inactive ('OFF');



After a user has been set as inactive, they will no longer have access to PostalWeb.

- **Roles and Locations:**

Roles and Locations

Roles ?

Authorize the user for the following roles

Mail Owner Admin	<input type="checkbox"/> OFF
IT Personnel	<input type="checkbox"/> OFF
Mail Owner User	<input checked="" type="checkbox"/> ON

Locations

Authorize the user for the following locations

Window Book, Inc.	<input type="checkbox"/> OFF
-------------------	------------------------------

Applications and Service Notification ▼

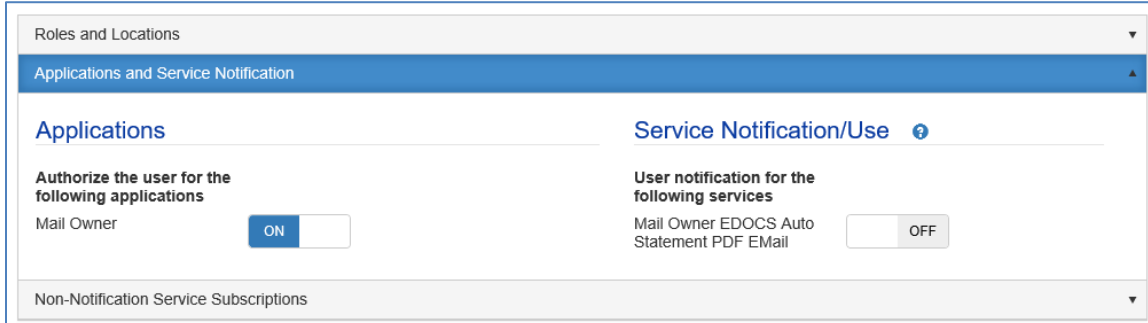
Non-Notification Service Subscriptions ▼

- **Roles:** The available 'Roles' are described in the [ROLES](#) section in this Guide. Selection of multiple roles is possible. De-selecting all roles will still allow the user to log in, but they will effectively have the role of 'Mail Owner User';
- **Locations:** The locations listed are those pre-defined locations that were selected in the '[Locations](#)' sub-category. Multiple locations can be selected;

 ***A user should have at least one location selected.***

 ***Administrators automatically have access to all locations.***

- **Applications and Service Notification:**



Roles and Locations

Applications and Service Notification

Applications

Authorize the user for the following applications

Mail Owner ☒ ON


Service Notification/Use

User notification for the following services

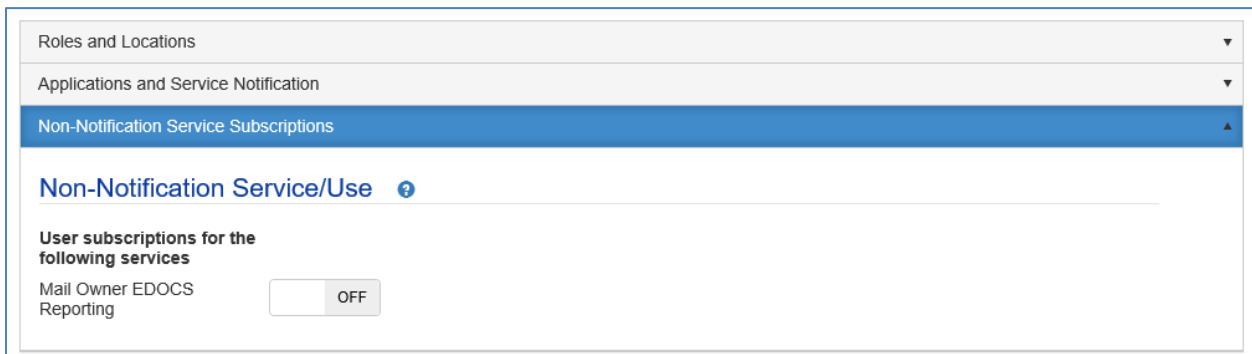
Mail Owner EDOCS Auto Statement PDF Email ☐ OFF

Non-Notification Service Subscriptions

- **Applications:** Allows selection of the available application(s);
 - **Mail Owner:** Set to 'ON' to authorize the user to receive subscription services.
- **Service Notification/Use:** Allows selection of any service(s) that are currently subscribed to. Only those services that have been previously subscribed to will be displayed. If no services have been subscribed to, the 'Service Notification' heading will not be displayed.

 ***For information on what services are available and how to subscribe to services, refer to the [Services](#) section in this Guide.***

- **Non-Notification Service/Use Subscriptions (optionally displayed):**



Roles and Locations

Applications and Service Notification


Non-Notification Service Subscriptions

Non-Notification Service/Use

User subscriptions for the following services

Mail Owner EDOCS Reporting ☐ OFF

- **Mail Owner EDOCS Reporting:** Allows control of an individual user's ability to access and use the 'EDOCS Reporting' feature. This option will only be displayed if 'EDOCS Reporting' is enabled by a Window Book Client Service Representative. Please refer to the [Reporting](#) section for more information on the 'EDOCS Reporting' feature.

 ***Enabling the 'EDOCS Reporting' feature will cause the 'Reporting' selection to appear in the user's top menu, but only if the user is assigned the Administrator role.***



Contact a Window Book Client Service Representative for information on obtaining access to the PostalWeb 'EDocs Reporting' module. Contact information can be found in the [Contact Information](#) section of this Guide.

After making all necessary selections, click the **Done** button:

Mail Owner

Manage User - Mary Doe - marydoe@pwexample.com

Active ☒ ON

Roles and Locations

Roles

Authorize the user for the following roles

Mail Owner Admin	<input type="checkbox"/> OFF
IT Personnel	<input type="checkbox"/> OFF
Mail Owner User	<input checked="" type="checkbox"/> ON

Locations

Authorize the user for the following locations

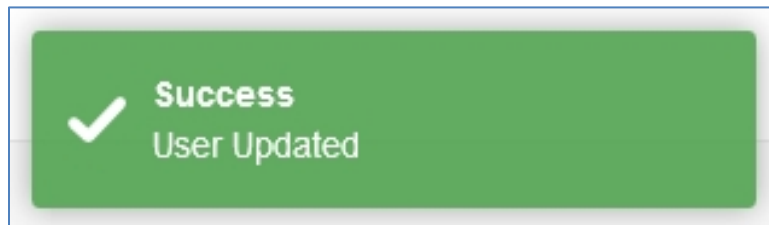
Window Book, Inc.	<input type="checkbox"/> OFF
-------------------	------------------------------


Applications and Service Notification

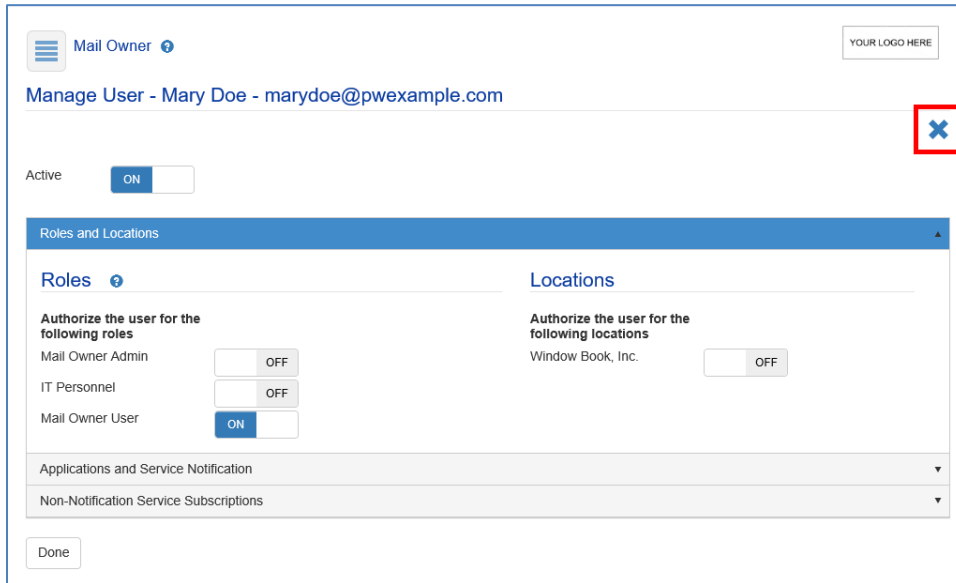
Non-Notification Service Subscriptions


Done

After clicking the **Done** button, a confirmation message will display:



Clicking the cancel icon () at any time will leave the editing screen and leave the settings unchanged:




Mail Owner 

YOUR LOGO HERE

Manage User - Mary Doe - marydoe@pwexample.com

Active ☒ ON

Roles and Locations

Roles 

Authorize the user for the following roles

Mail Owner Admin ☐ OFF

IT Personnel ☐ OFF

Mail Owner User ☒ ON

Locations

Authorize the user for the following locations

Window Book, Inc. ☐ OFF

Applications and Service Notification ▼

Non-Notification Service Subscriptions ▼

Done

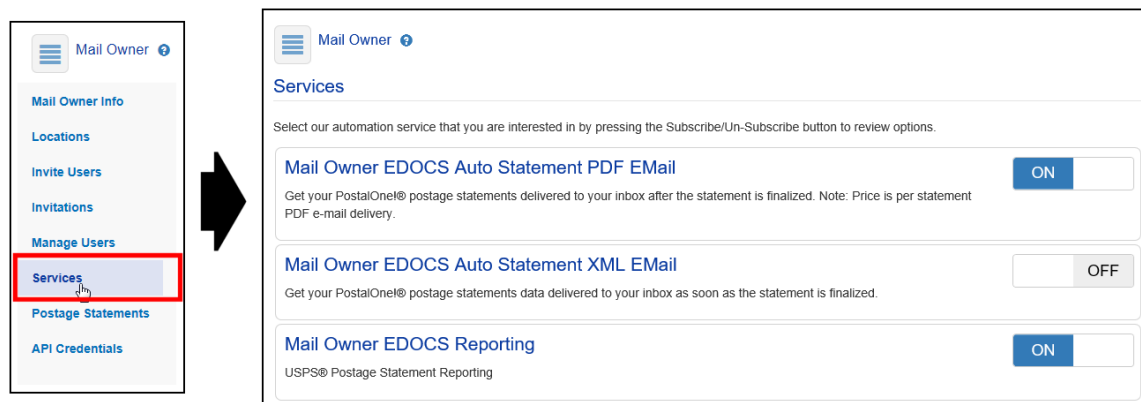


New users cannot be added here; they must be invited using the [Invite Users](#) process.

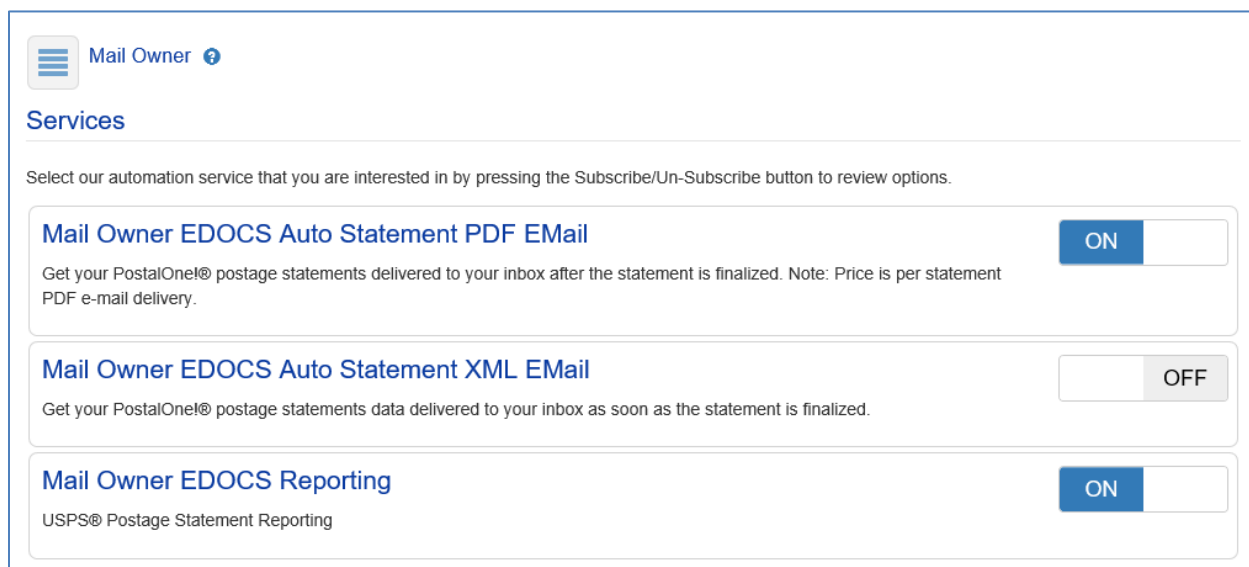
Services

Role Access: Administrator

The *Services* page is displayed by selecting the ‘Services’ option from the Mail Owner side menu:



The *Services* screen will display, showing a list of available services along with a corresponding **ON/OFF** button for each service:



Services are in the form of automatic delivery of electronic statements via email as an attachment. The attached statements can be in PDF or XML format.



The subscription services currently available (as of September 2016) are:

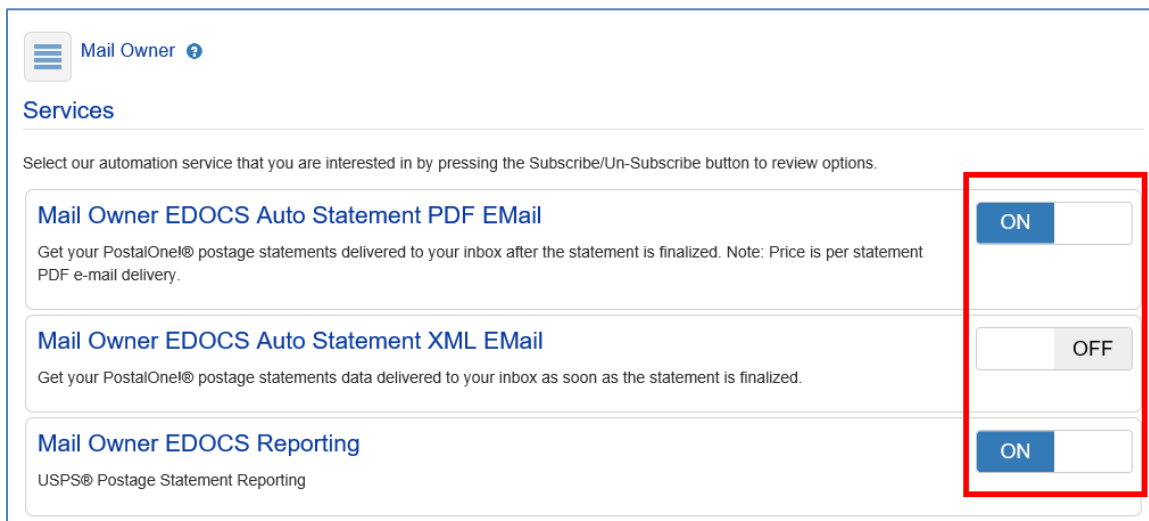
- **Mail Owner EDOCS Auto Statement PDF Email:** When a statement is released by *PostalOne!*, it will automatically be sent as a PDF email attachment to the email address of the user, when enabled in the user's [Manage Users](#) detail page;

- **Mail Owner EDOCS Auto Statement XML Email:** When a statement is released by *PostalOne!*, it will automatically be sent as an XML email attachment to the email address of the user, when enabled in the user's [Manage Users](#) detail page;
- **Mail Owner EDOCS Reporting (optional):** Enables the 'EDocs Reporting' feature to be displayed in each user's *Manage Users* detail screen. This option will only be displayed if it is enabled by a Window Book Client Service Representative. Please refer to the [Reporting](#) section for more information on the 'EDocs Reporting' feature.



Contact a Window Book Client Service Representative for information on obtaining access to the PostalWeb 'EDocs Reporting' module. Contact information can be found in the [Contact information](#) section of this Guide.

Clicking the associated **ON/OFF** button graphic toggles between subscribed ('ON', ) and un-subscribed ('OFF', ) actions. Clicking the button so that 'ON' is displayed will begin the subscription for that service. Clicking the button so that 'OFF' is displayed will un-subscribe from that service:

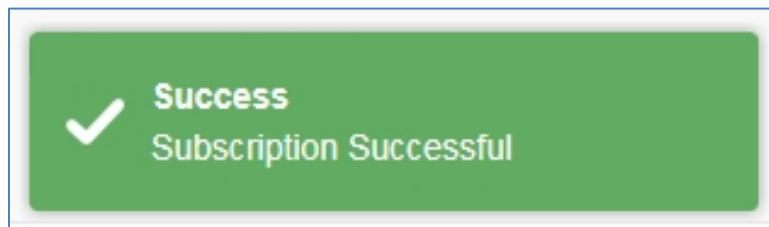


The screenshot shows the 'Mail Owner' services page. It lists three services, each with a description and a toggle button:

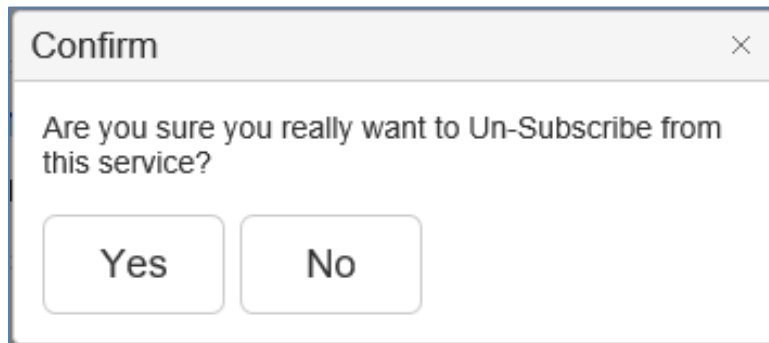
- Mail Owner EDOCS Auto Statement PDF Email**: Get your PostalOne!® postage statements delivered to your inbox after the statement is finalized. Note: Price is per statement PDF e-mail delivery. The toggle button is set to **ON**.
- Mail Owner EDOCS Auto Statement XML Email**: Get your PostalOne!® postage statements data delivered to your inbox as soon as the statement is finalized. The toggle button is set to **OFF**.
- Mail Owner EDOCS Reporting**: USPS® Postage Statement Reporting. The toggle button is set to **ON**.

The toggle buttons are highlighted with a red box.

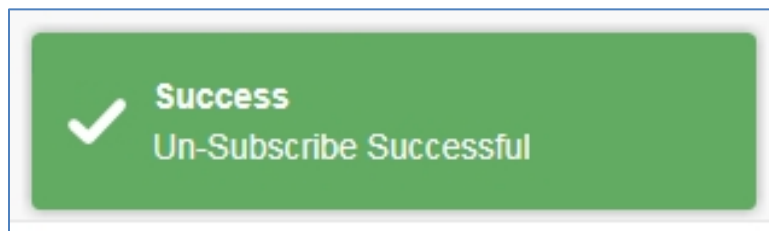
When a service is set to '**ON**', a confirmation message will display:



When a service is set to '**OFF**', a *Confirm* dialog will display asking the user to confirm that they wish to un-subscribe from that service:



Click the **Yes** button to continue the un-subscribe process, or click the **No** button to cancel the un-subscribe process. If the **Yes** button is clicked, a message will display confirming the un-subscribe was successful:

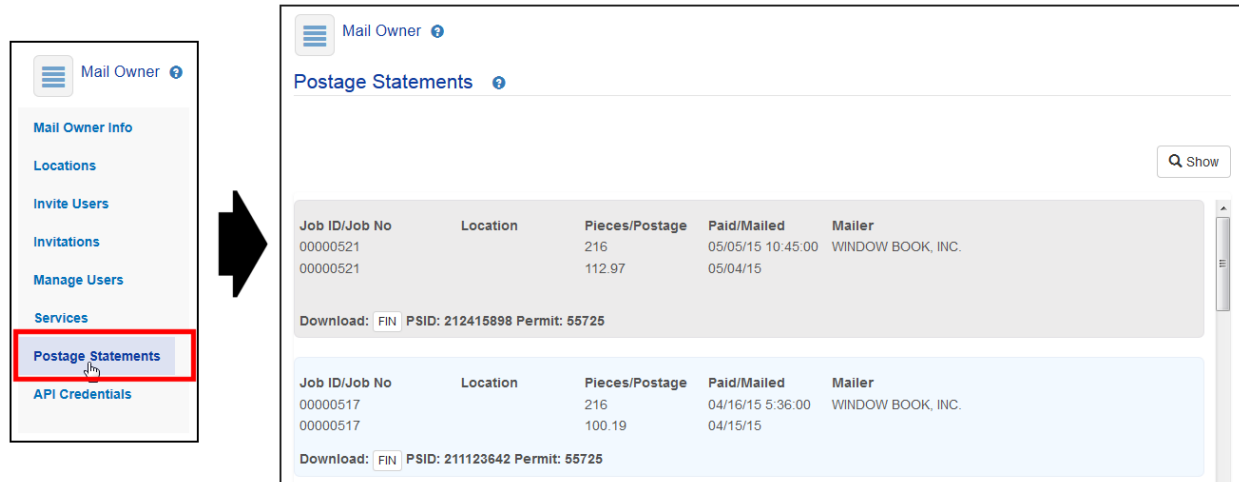


After subscribing to a service or services here, each user intended to use the service(s) must be assigned the Mail Owner application. This can be accomplished at the time of their invitation, or at the [Manage Users](#) settings in the 'Mail Owner' category.

Postage Statements

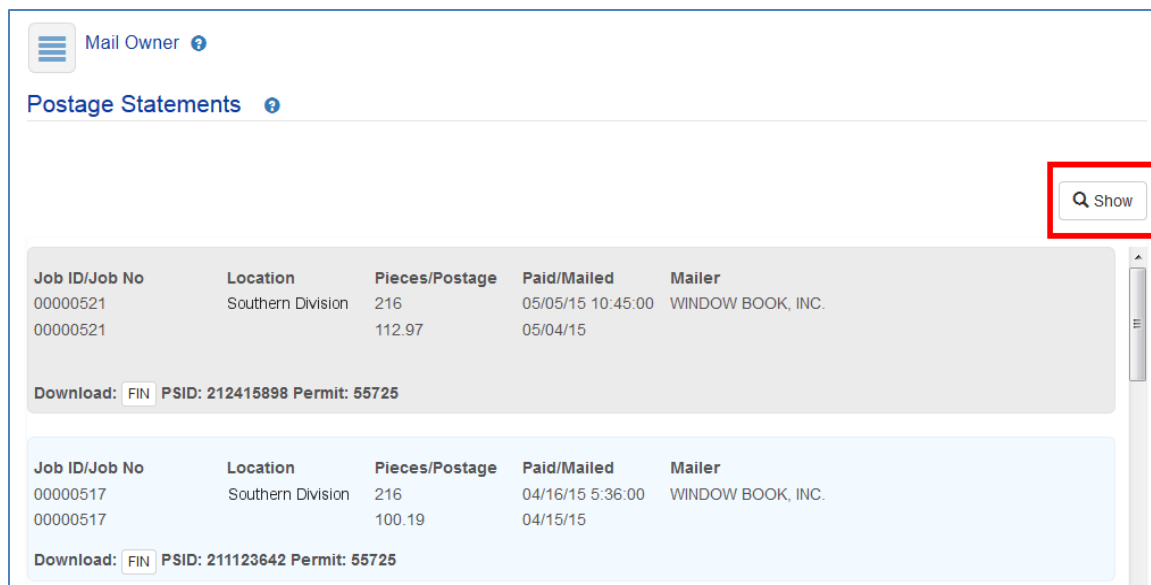
Role Access: Administrators when accessing via the Mail Owner category.

The *Postage Statements* screen is displayed by selecting the 'Postage Statements' option from the Mail Owner side menu:



The *Postage Statements* screen displays the postage statements that have been generated by *PostalOne!*. The screen displays postage statements based on the filter settings.

The postage statements shown in the list are selectively filtered. To display the possible filters, click the **Show** button:



The following are the possible filters:

Postage Statements

Start Date: 11/02/2015

Job ID: Job No: PS ID: Mailer*: All

Reset Refresh

Job ID/Job No	Location	Pieces/Postage	Paid/Mailed	Mailer
00000521	Southern Division	216	05/05/15 10:45:00	WINDOW BOOK, INC.
00000521		112.97	05/04/15	

Download: FIN PSID: 212415898 Permit: 55725

Job ID/Job No	Location	Pieces/Postage	Paid/Mailed	Mailer
00000517	Southern Division	216	04/16/15 5:36:00	WINDOW BOOK, INC.
00000517		100.19	04/15/15	

Download: FIN PSID: 211123642 Permit: 55725

- **Start Date:** The date shown is the LAST date of the statements to be displayed (inclusive). Only statements with dates previous to the date shown will be displayed. Statements with dates after the date displayed will NOT be shown. This filter is not used if the Job ID, Job No or PS ID is used as a filter;



The Start Date value is limited to the previous 90 days.

- **Job ID:** Filters on a Job ID. Entering the entire Job ID string is not necessary; it is only necessary to enter as many leading characters as needed to filter the list as desired. Multiple statements may be displayed if the entire Job ID is not entered. The 'Start Date' is not used as a filter when this field is used;
- **Job No:** Filters on a Job No. Entering the entire Job No. string is not necessary; it is only necessary to enter as many leading characters as needed to filter the list as desired. Multiple statements may be displayed if the entire Job No is not entered. The 'Start Date' is not used as a filter when this field is used;



Any leading zeros must also be entered.

- **PS ID:** Filters on a 'Postage Statement Identification' number (PS ID). Entering the entire PS ID string is not necessary; it is only necessary to enter as many leading characters as needed to filter the list as desired. Multiple statements may be displayed if the entire PS ID is not entered. The 'Start Date' is not used as a filter when this field is used;
- **Mailer*:** This filter is always used. It can be used to select either a single mailer or all mailers within the PostalWeb mailer database associated with the mail owner.



Any time a filter is changed, the 'Refresh' button must be clicked to update the displayed jobs. The 'Refresh' button will turn blue in color when the displayed data is stale and the 'Refresh' button needs to be clicked.

The items listed for each individual postage statement are as follows:

Mail Owner ⓘ

Postage Statements

Start Date: 11/02/2015


Job ID: [] ⓘ Job No: [] ⓘ PS ID: [] ⓘ Mailer: All [v]

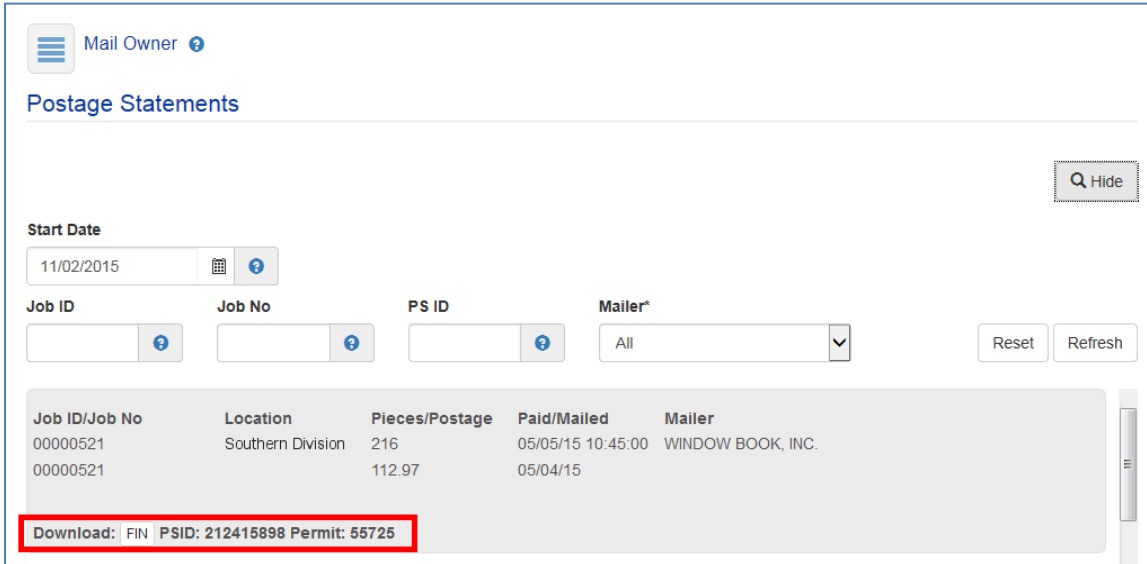
Reset Refresh

Job ID/Job No	Location	Pieces/Postage	Paid/Mailed	Mailer
00000521	Southern Division	216	05/05/15 10:45:00	WINDOW BOOK, INC.
00000521		112.97	05/04/15	

Download: FIN PSID: 212415898 Permit: 55725

- **Job ID/Job No.:** The Job ID and Job No. associated with this postage statement;
- **Location:** The location where the submission originated from;
- **Pieces/Postage:** The number of pieces mailed / the amount of postage paid;
- **Paid/Mailed:** The date and time payment of postage was made / date the pieces were mailed;
- **Mailer:** The name of the mailer.

To view or download a PDF version of a specific postage statement, click the corresponding **FIN** button (). Clicking the **FIN** button will download the postage statement as a PDF file or display the document in the browser, providing the browser has a PDF reader installed as a plug-in. Also displayed is the associated Postage Statement ID (PS ID) as well as the permit number:



Job ID/Job No	Location	Pieces/Postage	Paid/Mailed	Mailer
00000521	Southern Division	216	05/05/15 10:45:00	WINDOW BOOK, INC.
00000521		112.97	05/04/15	

Download: FIN PSID: 212415898 Permit: 55725

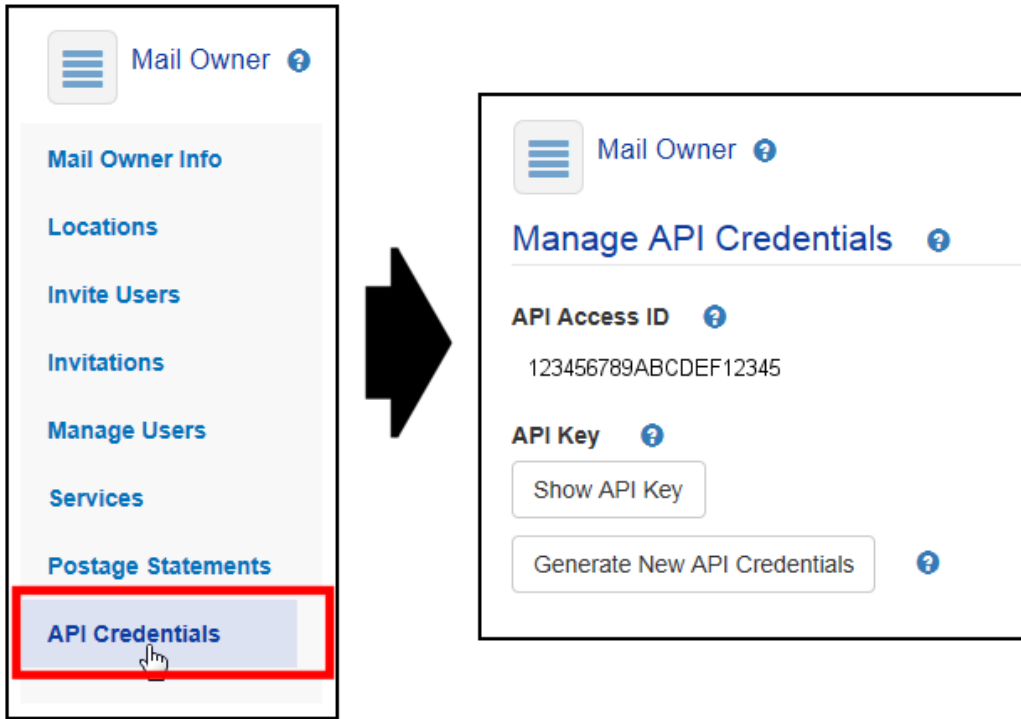


The postage statement is in the form of a standard USPS Form 3602-R.

API Credentials

Role Access: ALL

Allows the user to view their company API Credentials:



To access the 'API Key', click the **Show API Key** button.

 ***Do NOT click the 'Generate New API Credentials' button!***

REPORTING

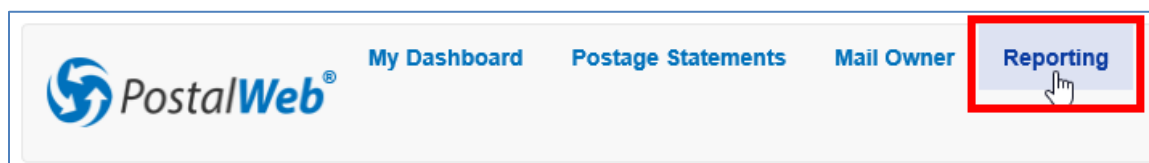
Role Access: Administrator



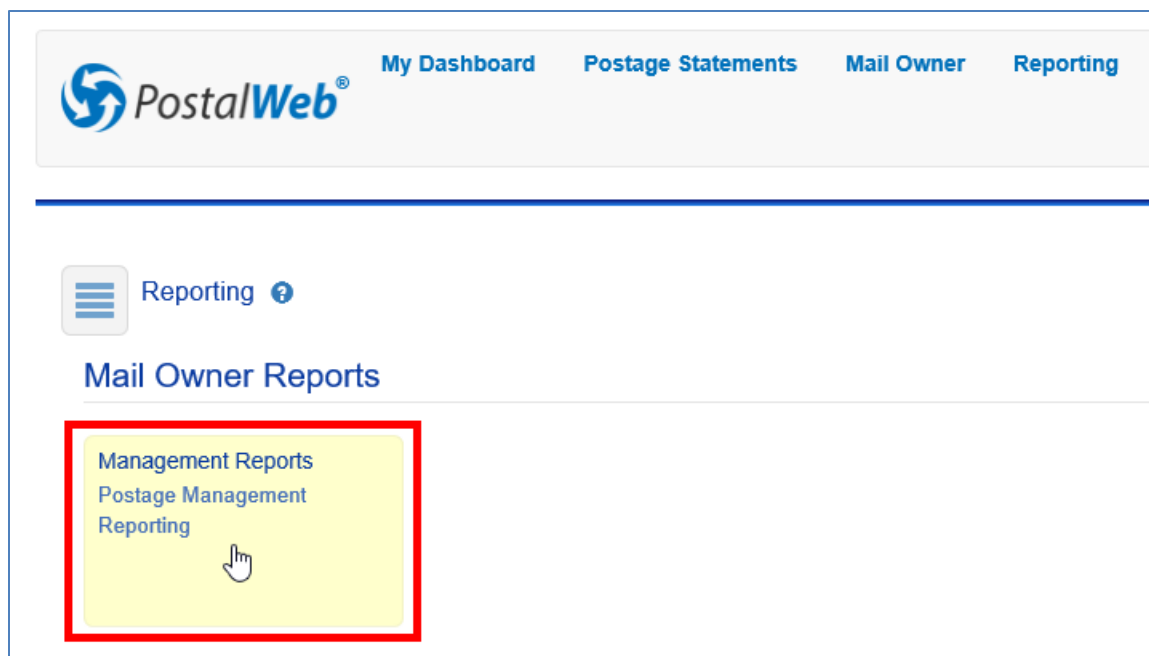
The 'Reporting' top menu item will only appear if the 'Reporting' feature has been enabled by a Window Book Representative. Contact a Window Book Client Service Representative for information on obtaining access to the PostalWeb 'Reporting' module. Contact information can be found in the [Contact Information](#) section of this Guide.

The optional PostalWeb 'Reporting' module allows user-configurable reports to be easily generated and displayed, then saved in either PDF or Excel® formats if desired. Reports are based on the past 13 months of data (at a minimum) from the client's past postage statements retrieved from *PostalOne!*.

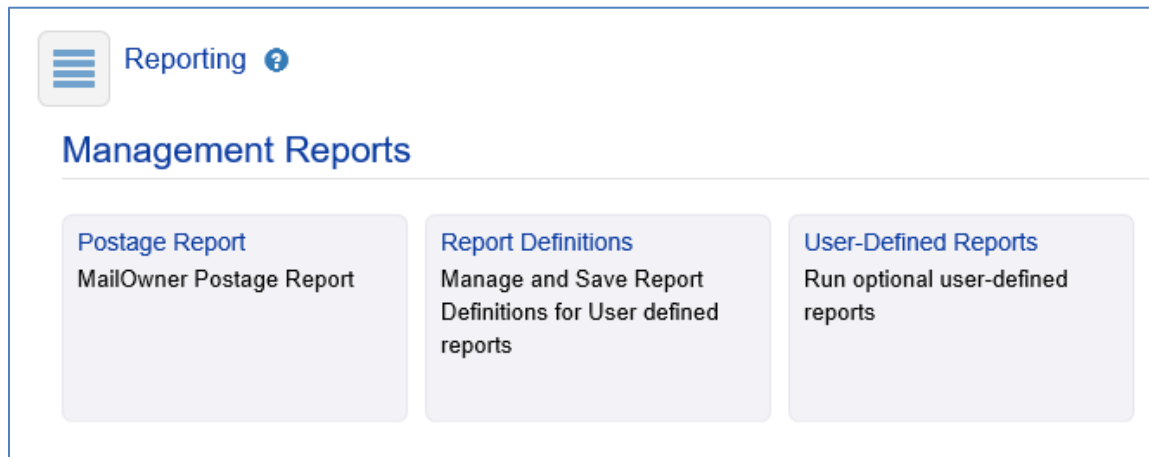
To view the *Reporting* screen, click the 'Reporting' top menu item:



A new page will display. Click the 'Management Reports' tile:



A new *Management Reports* screen will display:



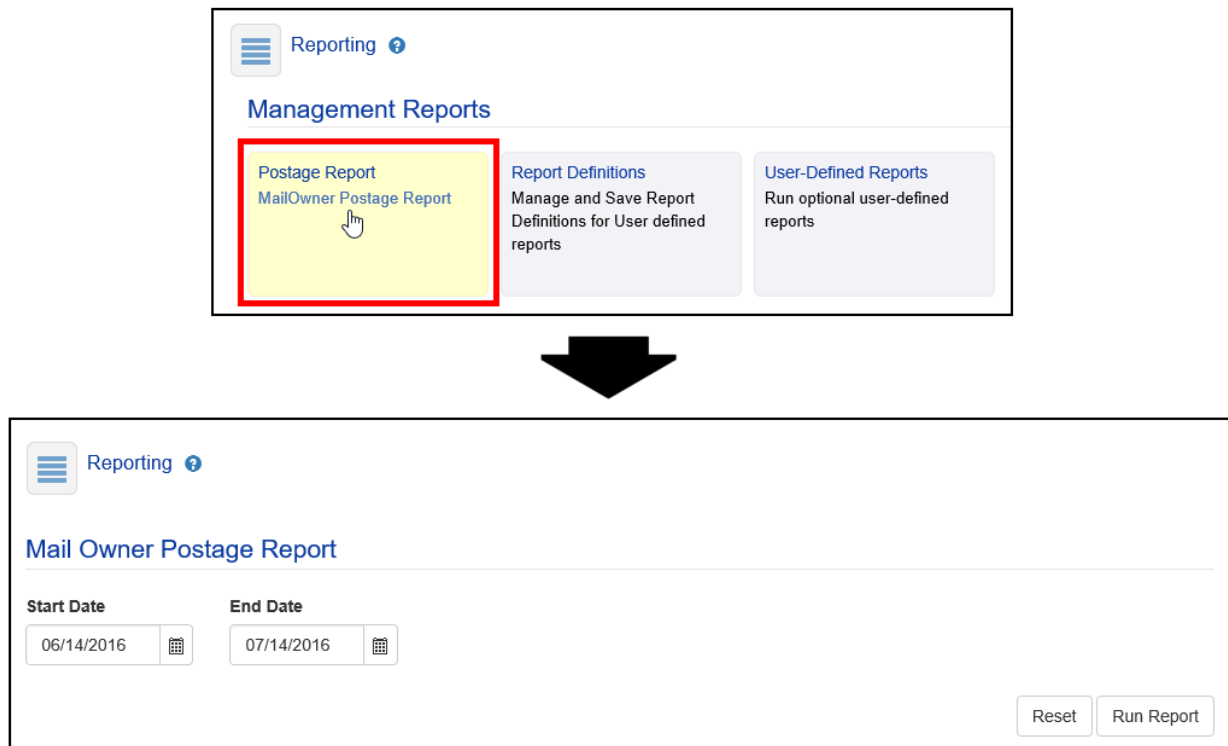
The following items are available for selection:

- **[Postage Report:](#)** A summary report of all mailings for a user-defined period that are itemized by class, mailing category (flats, letters, etc.) and rates. The resulting report may be exported into various file formats and/or printed. This report is a pre-defined, fixed layout;
- **[Report Definitions:](#)** A utility to configure a 'User-Defined Report' template to be used by the 'User-Defined Reports' report generation module. Templates may be configured as either a summary or detailed listing using virtually any data field contained in a postage statement, in any order desired. Multiple templates may be configured and saved;
- **[User-Defined Reports:](#)** A report generator module that uses the report templates previously defined in the 'Report Definitions' utility module in combination with basic filtering to generate a report. The user-defined report may be displayed and then saved as a PDF or Excel format file.

Postage Report



The Postage Report is a summary report of all mailings that PostalWeb has collected for a user-defined period that are itemized by class, mailing category (flats, letters, etc.) and rates. The resulting report may be exported to Excel or PDF file formats.

The *Postage Report* screen is displayed by clicking the 'Postage Report' tile on the *Management Reports* screen:





After selecting the 'Postage Report', 'Start Date' and 'End Date' values will display. The 'Start Date' value defaults to a date approximately 30 days earlier than the current date, while the 'End Date' value defaults to the current date. If desired, the date values may be changed to new values.

The **Run Report** button must then be clicked to display the ‘Company Postage Report Result’:


 Reporting 

Mail Owner Postage Report



Start Date
06/14/2016 

End Date
07/14/2016 


Reset


Run Report 



 Reporting 


Mail Owner Postage Report


Start Date
06/14/2016 

End Date
07/14/2016 

Reset





Run Report


 Export to Excel

 Export to PDF

Mail Owner Postage Report Result

Form/Mail Class	Category	Rate Level	Pieces	Postage
Standard	Flats		0	1.69
Standard	Flats	3-Digit	562	262.45
Standard	Flats	ADC	689	359.66
Standard	Flats	Mixed ADC	440	237.16
			1,691	860.96

  **1**  

20  items per page

1 - 4 of 4 items

Largest Job	Smallest Job	Total Jobs	Average Job
880	586	5	676

The 'Company Postage Report Result' table is comprised of the following items:

Export to Excel

Export to PDF

Mail Owner Postage Report Result

1 Form/Mail Class	2 Category	3 Rate Level	4 Pieces	5 Postage
Standard	Flats		0	1.69
Standard	Flats	3-Digit	562	262.45
Standard	Flats	ADC	689	359.66
Standard	Flats	Mixed ADC	440	237.16
			1,691	860.96

1

20

items per page

1 - 4 of 4 items

1. **Form/Mail Class:** The class or form of mail;
2. **Category:** The type of mail (letters, flats, etc.);
3. **Rate Level:** The rate level or type applied to the mail class and category;
4. **Pieces:** The total number of pieces for the combination of Form/Mail Class, Category and Rate Level;
5. **Postage:** The total postage cost for the number of pieces mailed, using the combination of Form/Mail Class, Category and Rate Level.

Below the report table, a basic statistics chart is displayed that provides a summary of the job data the report was derived from:

1

20

items per page

Largest Job	Smallest Job	Total Jobs	Average Job
880	586	5	676

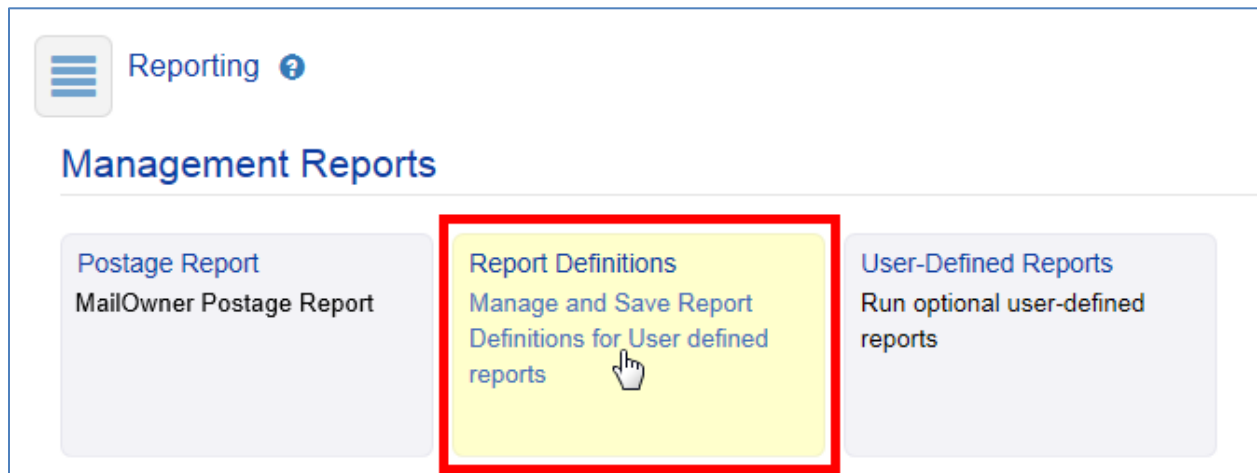
Report Definitions

The 'Report Definitions' module allows for the configuration of user-defined report templates. These templates can then be used to generate a report in the [User-Defined Reports](#) module. Report definition templates may be configured to generate either a summary or detailed report listing using virtually any data field contained in a postage statement, and in any order desired. Multiple report definitions may be configured and saved.

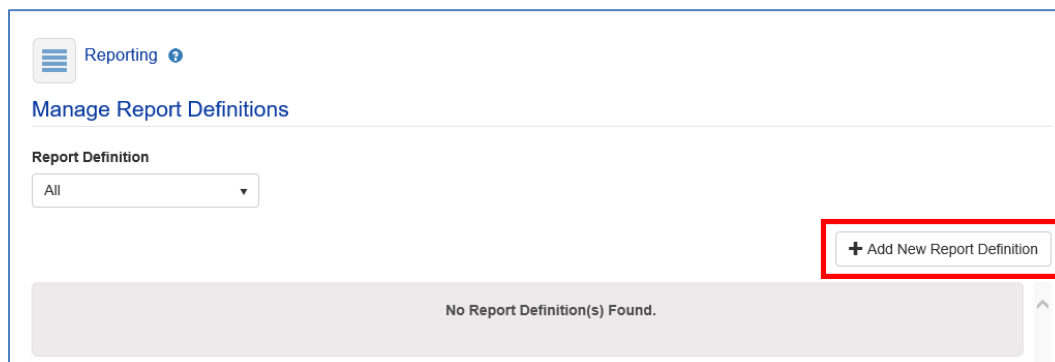


A 'report definition' must be created before a 'user-defined report' can be generated.

To view, create or modify report definition templates, click the 'Report Definitions' tile:



A *Manage Report Definitions* screen will display. On initial navigation to this screen, there will be no templates defined. In this case the **Add New Report Definition** button must be clicked to create a new report definition:



Add New Report Definition

To add a new definition (template), click the **Add New Report Definition** button:

Reporting ⓘ

Manage Report Definitions

Report Definition

All ▼

+ Add New Report Definition

No Report Definition(s) Found.

A new *Manage Report Definition* screen will display (with the default 'Summary' report type selected). This screen allows the user to name and configure a new definition (or edit an existing definition):

Reporting ⓘ

Manage Report Definition - ✕

Report Definition Name* Report Type

Summary ▼

Shared

OFF

Fields

Job

Mailing Attributes

Postage Pieces

USPS Transaction

Preparer

MailOwner

Permit Holders

Publications

PW Internal

Job Number OFF

Job Description OFF

Customer Ref ID OFF

Job ID OFF

Mail.Dat File Name OFF

Summary By

When grouping is used, only numeric fields that can be totaled will be available for selection

Job

Mailing Attributes

Postage Pieces

USPS Transaction

Preparer

MailOwner

Permit Holders

Publications

PW Internal

Job Number OFF

Job Description OFF

Customer Ref ID OFF

Job ID OFF

Mail.Dat File Name OFF

Report Sort Order

Available fields

Order by fields

→

←

Done

To configure a new report definition, perform the following:

1. Enter a name for the definition in the 'Report Definition Name' text box. The name may contain special characters and has no minimum length;
2. Select a 'Report Type'. The possible types are: 'Summary' (default) and 'Detail' (for a detailed description of report types, refer to [Construction of Report Definitions](#));
3. If the report definition is to be shared with other PostalWeb users, select the 'Shared' feature (click the button to display 'ON' (☐ ON));
4. Select the desired fields to be shown on the report;
5. Select the order in which the fields are to appear on the report;
6. Click the **Done** button to save the report definition.

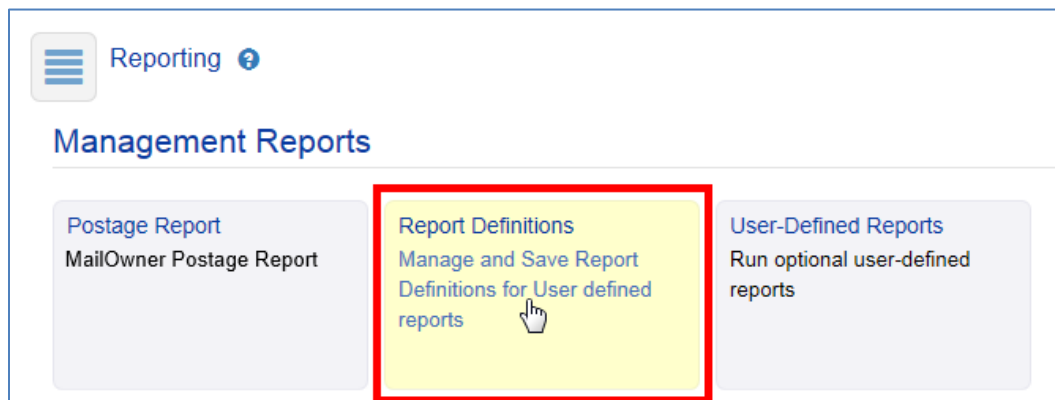


Click the 'Done' button to save any updates made in the 'Manage Report Definitions' screen! Navigating away from the 'Manage Report Definition' screen at any time without first clicking the 'Done' button will cancel any work done, whether creating a new definition or editing an existing report definition.

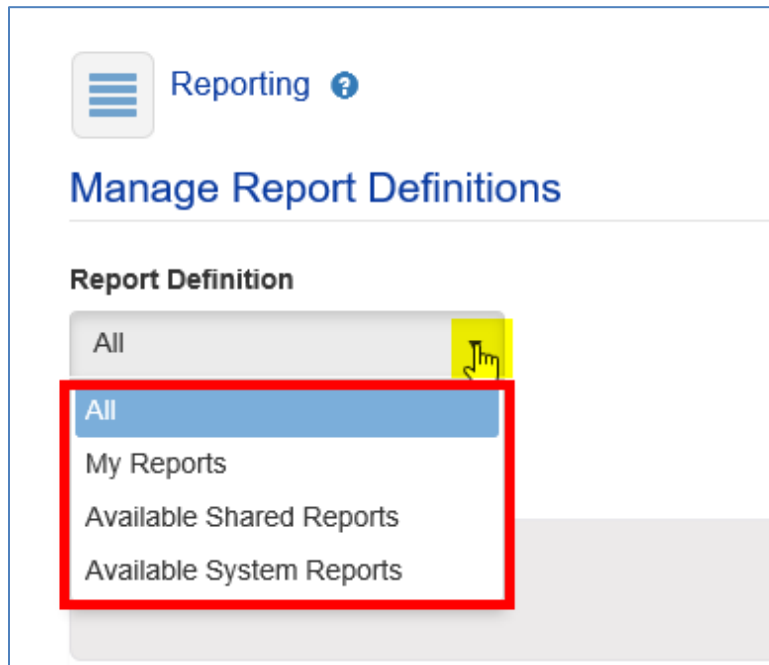
Edit an Existing Report Definition

To edit an existing report definition, perform the following:

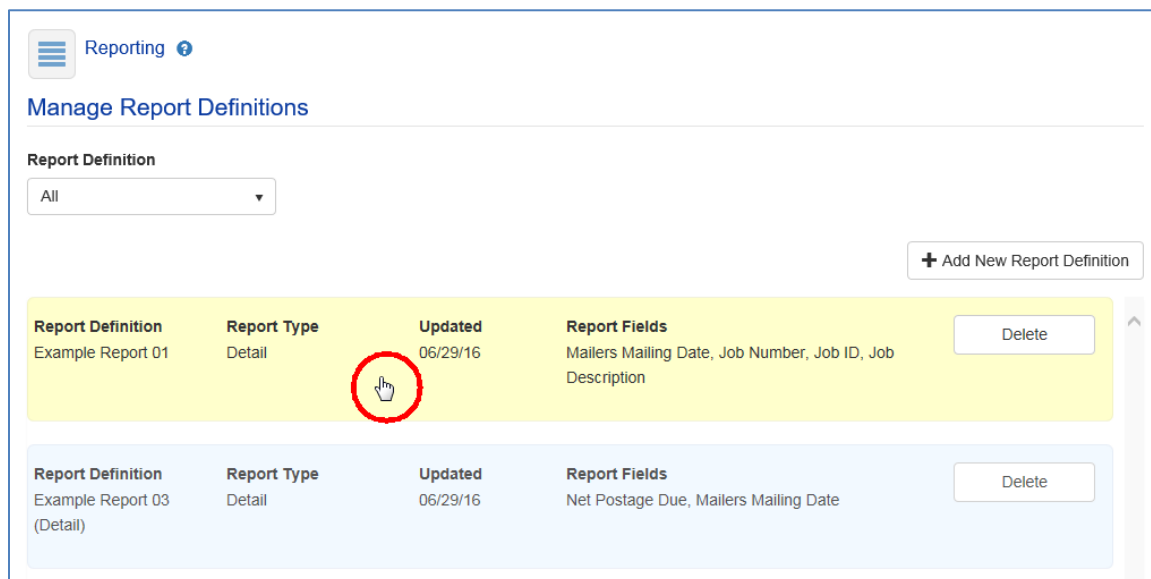
1. Navigate to the main *Manage Report Definitions* screen by clicking on the 'Report Definitions' tile located on the *Management Reports* screen:



- The *Manage Report Definitions* screen will display, with all of the existing report definitions listed by default. To filter the report definitions list, click the 'Report Definition' pull down to display the available report category filters. Select the desired filter by clicking on it:



- Find the name of the desired report definition and click on the associated colored tile:



The existing configuration of the selected report definition will display. Any part of the report definition may be edited:

Reporting

Manage Report Definition - Example Report 01

Report Definition Name* Report Type

Shared ☐

Fields

Job

Mailing Attributes

Postage Pieces

USPS Transaction

Preparer

MailOwner

Permit Holders

Publications

PW Internal

Job Number ☐ Job ID ☐

Job Description ☐ Mail.Dat File Name ☐

Customer Ref ID ☐

Report Sort Order

Check order field to show subtotals

Available fields

Order by fields

Job Number ☐

Job ID ☐

Job Description ☐

Mailing Mailing Date ☒

Done

4. When editing is complete, click the **Done** button to save the changes.



Click the 'Done' button to save any updates made to the report definition! Navigating away from the screen at any time without first clicking the 'Done' button will cancel any changes made to the report definition.



Construction of Report Definitions


There are two report types available:

- A [Summary](#) report (default) will aggregate statements that share a common identifier specified by the user and show subtotals;
- A [Detail](#) report will list each postage statement that meets the user's filter criteria.

Summary Report

If 'Summary' is selected as the report type (default), the screen will consist of three separate sections: 'Fields'; 'Summary By'; and 'Report Sort Order':

 Reporting 

Manage Report Definition - 

Report Definition Name*

Report Type

Shared
☐ OFF

Fields

Job

Mailing Attributes

Postage Pieces

USPS Transaction

Preparer

MailOwner

Permit Holders

Publications

PW Internal

Job Number

Job Description

Customer Ref ID

☐ OFF

☐ OFF

☐ OFF

Job ID

Mail.Dat File Name

☐ OFF

☐ OFF

Summary By

When grouping is used, only numeric fields that can be totaled will be available for selection

Job

Mailing Attributes

Postage Pieces

USPS Transaction

Preparer

MailOwner

Permit Holders

Publications

PW Internal

Job Number

Job Description

Customer Ref ID

☐ OFF

☐ OFF

☐ OFF

Job ID

Mail.Dat File Name

☐ OFF

☐ OFF

Report Sort Order

Available fields

→

←

Order by fields

- **Fields section:** Contains virtually all fields that make up a postage statement, organized into various categories. Any field may be selected to be displayed in the report (as a column). For a complete list of the fields available, refer to [APPENDIX 4](#);
- **Summary By section:** Contains all the fields that the report may be 'summarized' or 'grouped' by;
- **Report Sort Order section:** Used to define the order and grouping of the selected fields within the report.

To construct a 'Summary' report definition, perform the following:



The fields located in the 'Summary By' section are usually chosen before the fields located in the 'Fields' section.

1. Enter the 'Report Definition Name' in the text box provided:

Reporting ?

Manage Report Definition -


Report Definition Name*

Report Type

Summary

Shared

OFF

2. If the report definition is to be made available to other users, click the **Shared** ON/OFF toggle button so that it displays 'ON' ():

Reporting ?

Manage Report Definition -


Report Definition Name*

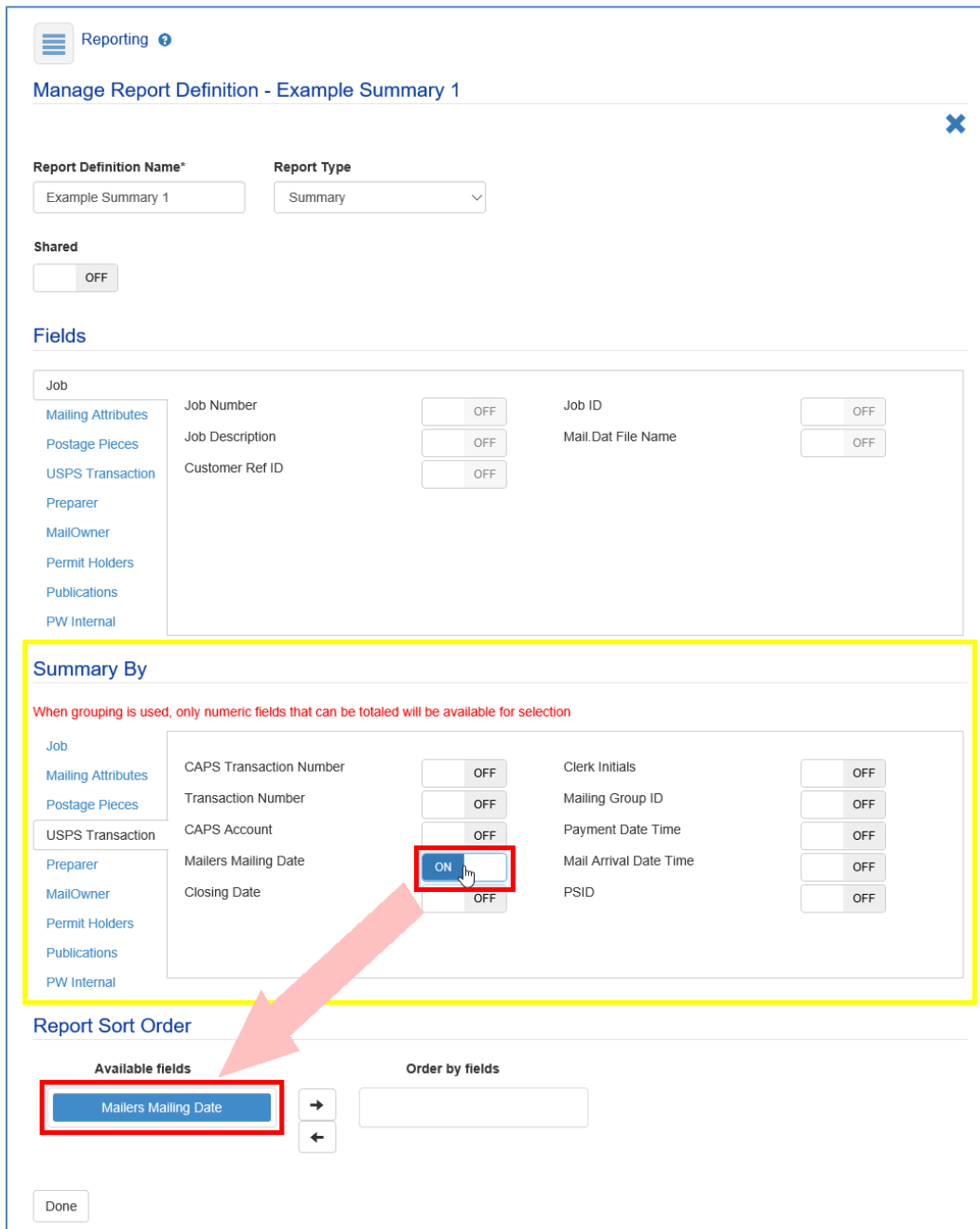
Report Type

Summary

Shared

ON

3. In the 'Summary By' section, select the desired field(s) the report is to be summarized by. To select a field, the field name or its associated button must be clicked. The associated ON/OFF toggle button will change to 'ON' () and a new tile with the field's name will be placed in the 'Available fields' stack located in the 'Report Sort Order' section of the screen:



Reporting ⓘ

Manage Report Definition - Example Summary 1

Report Definition Name*
Example Summary 1

Report Type
Summary

Shared
OFF

Fields

Job	Job Number	OFF	Job ID	OFF
Mailing Attributes	Job Description	OFF	Mail.Dat File Name	OFF
Postage Pieces	Customer Ref ID	OFF		
USPS Transaction				
Preparer				
MailOwner				
Permit Holders				
Publications				
PW Internal				

Summary By

When grouping is used, only numeric fields that can be totaled will be available for selection

Job	CAPS Transaction Number	OFF	Clerk Initials	OFF
Mailing Attributes	Transaction Number	OFF	Mailing Group ID	OFF
Postage Pieces	CAPS Account	OFF	Payment Date Time	OFF
USPS Transaction	Mailing Mailing Date	ON	Mail Arrival Date Time	OFF
Preparer	Closing Date	OFF	PSID	OFF
MailOwner				
Permit Holders				
Publications				
PW Internal				

Report Sort Order

Available fields

Mailing Mailing Date

Order by fields

Done

- As additional fields are selected, they are added to the 'Available fields' stack in the order they are chosen:

Reporting

Manage Report Definition - Example Summary 1

Report Definition Name*

Example Summary 1

Report Type

Summary

Shared

OFF

Fields

Job

Mailing Attributes

Postage Pieces

USPS Transaction

Preparer

MailOwner

Permit Holders

Publications

PW Internal

Job Number

Job Description

Customer Ref ID

Job ID

Mail.Dat File Name

Summary By

When grouping is used, only numeric fields that can be totaled will be available for selection

Job

Mailing Attributes

Postage Pieces

USPS Transaction

Preparer

MailOwner

Permit Holders

Publications

PW Internal

Political

Post Office City

Post Office Zip

Form

Profit Indicator

Round Trip Only

Combined Mixed Single C

Price Category

Issue Date

OFF

ON

OFF

OFF

OFF

OFF

OFF

OFF

OFF

Election

Post Office State

Post Office Zip+4

Processing Category

DVD CD Other Disk

Hold For Pickup Pieces

Mail Class

Edition Code

Issue Freq

OFF

OFF

OFF

OFF

OFF

OFF

OFF

OFF

OFF

Report Sort Order

Available fields

Mailing Mailing Date

Post Office City

Order by fields

Done

Page 110 of 168

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- After the 'Summary By' fields have been selected, the fields in the 'Fields' section should be selected. The same method that was used to select fields in the 'Summary By' section is also used in the 'Fields' section:

Reporting ⓘ

Manage Report Definition - Example Summary 1

Report Definition Name* Example Summary 1 **Report Type** Summary

Shared OFF

Fields

Job	Net Postage Due	OFF	Total USPS Adj. Postage	OFF
Mailing Attributes	Postage Affixed Total	OFF	Rate Postage Affixed	OFF
Postage Pieces	Discount Amount	OFF	Rate Postage Affixed Desc	OFF
USPS Transaction	Total Pieces	ON	Total Weight	OFF
Preparer				
MailOwner				
Permit Holders				
Publications				
PW Internal				

Summary By

When grouping is used, only numeric fields that can be used in calculations are available for selection

Job	Political	OFF	Election	OFF
Mailing Attributes	Post Office City	ON	Post Office State	OFF
Postage Pieces	Post Office Zip	OFF	Post Office Zip+4	OFF
USPS Transaction	Form	OFF	Processing Category	OFF
Preparer	Profit Indicator	OFF	DVD CD Other Disk	OFF
MailOwner	Round Trip On	OFF	Hold For Pickup Pieces	OFF
Permit Holders	Combined M	OFF	Mail Class	OFF
Publications	Pric	OFF	Edition Code	OFF
PW Internal	Issu	OFF	Issue Freq	OFF

Report Sort Order

Available fields

- Mailers Mailing Data
- Post Office City
- Total Pieces

Order by fields

Done



After a field in the 'Summary By' section has been selected, certain fields in the 'Fields' section may become disabled (ghosted) and not selectable. Once a field in the 'Summary By' section is selected, only those fields in the 'Fields' section that contain numeric data that can be used in a calculation are available for selection. For example, the 'Mail.Dat File Name' field in the 'Fields' section is disabled (ghosted) because the mail.dat file name field is text and the data within that

field cannot be used in calculations. However, fields such as 'Transaction Amount', 'Total Weight' and, 'Total Pieces' are available for selection since the data in these fields are numeric and calculations may be performed on that data.

6. After the fields are selected and their tiles have accumulated in the 'Available fields' stack, the tiles can be placed in the 'Order by fields' stack by either of the following methods:
 - a. Select a field by clicking on the tile (turning the tile dark blue), then click the right arrow:

Report Sort Order

Available fields

Order by fields

Job Number

Job Description

Customer Ref ID

Job ID

Mail.Dat File Name



Report Sort Order

Available fields

Order by fields

Job Number

Job Description

Customer Ref ID

Job ID

Mail.Dat File Name



Report Sort Order

Available fields

Order by fields

Job Description

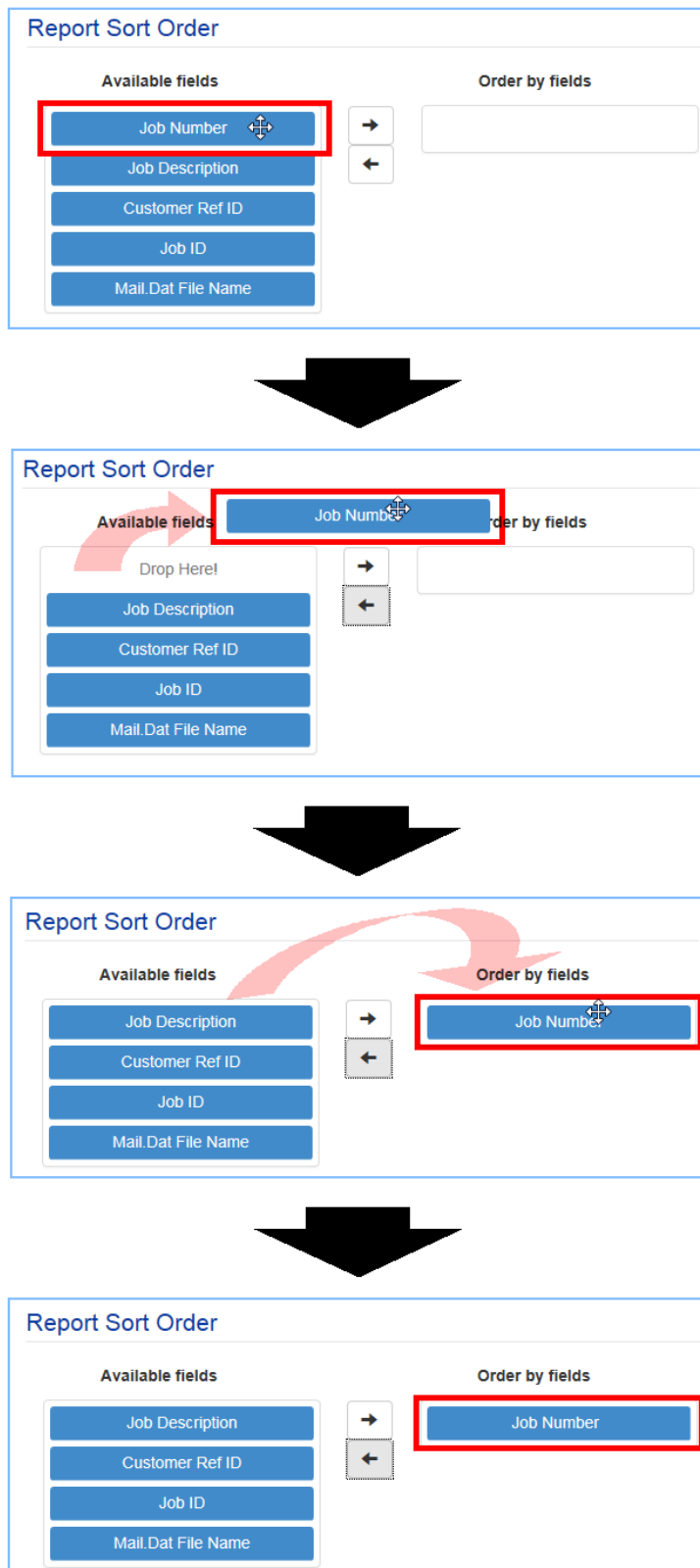
Customer Ref ID

Job ID

Mail.Dat File Name

Job Number

- b. Using the 'drag and drop' method, select a field by moving the mouse cursor over the desired tile in the 'Available fields' stack, press and hold the left mouse button, and, keeping the left mouse button pressed, drag the tile into the 'Order by fields' stack and release the mouse button:





To remove a field tile from either stack, the field must be turned 'OFF' in the 'Summary By' and/or the 'Fields' section. The associated field tile will automatically be removed from the stack.

The field tiles that appear in both the 'Order by fields' and the 'Available fields' will be included in the report. The fields shown in the 'Order by fields' stack will appear first in the report, in the order they appear in the stack. The top-most field tile on the 'Order by fields' stack will be displayed as the left-most column on the report.

Any fields listed in the 'Available fields' stack appear in the report in a pre-determined order, but they will appear in the report *after* the fields listed in the 'Order by fields' stack. For this reason, it is recommended to move all the fields listed in the 'Available fields' stack to the 'Order by fields' stack to ensure the correct order of appearance in the report. After a tile is placed in the 'Order by fields' stack, it may be moved to a different position vertically within the same 'Order by fields' stack using the 'drag and drop' method described earlier.

7. After the field tiles are set to their desired location within the 'Order by fields' stack, the **Done** button, located near the bottom of the web page, must be clicked to save the report definition:

Report Sort Order

Available fields

Order by fields

Job Number

Total Pieces

Net Postage Due

Total Weight

Done

Example: A user wishes to generate a list of 'Total Pieces' and 'Total Weight' summarized (i.e. grouped) by the 'Mailing Mailing Date'. The user performs the following:

8. A 'summary' report definition is configured that consists of the 'Mailing Mailing Date' field, selected (set to 'ON') in the 'Summary By' section, and the 'Total Pieces' and 'Total Weight' fields, selected in the 'Fields' section:

Report Definition Name*

Report Type

Shared
☐ OFF

Fields

Job
Mailing Attributes
Postage Pieces
USPS Transaction
Preparer
MailOwner
Permit Holders
Publications
PW Internal

Net Postage Due	<input type="checkbox"/> OFF	Total USPS Adj. Postage	<input type="checkbox"/> OFF
Postage Affixed Total	<input type="checkbox"/> OFF	Rate Postage Affixed	<input type="checkbox"/> OFF
Discount Amount	<input type="checkbox"/> OFF	Rate Postage Affixed Desc	<input type="checkbox"/> OFF
Total Pieces	<input checked="" type="checkbox"/> ON	Total Weight	<input checked="" type="checkbox"/> ON

Summary By

When grouping is used, only numeric fields that can be totaled will be available for selection

Job
Mailing Attributes
Postage Pieces
USPS Transaction
Preparer
MailOwner
Permit Holders
Publications
PW Internal

CAPS Transaction Number	<input type="checkbox"/> OFF	Clerk Initials	<input type="checkbox"/> OFF
Transaction Number	<input type="checkbox"/> OFF	Mailing Group ID	<input type="checkbox"/> OFF
CAPS Account	<input type="checkbox"/> OFF	Payment Date Time	<input type="checkbox"/> OFF
Mailing Mailing Date	<input checked="" type="checkbox"/> ON	Mail Arrival Date Time	<input type="checkbox"/> OFF
Closing Date	<input type="checkbox"/> OFF	PSID	<input type="checkbox"/> OFF

Report Sort Order

Available fields

Mailing Mailing Date
Total Pieces
Total Weight

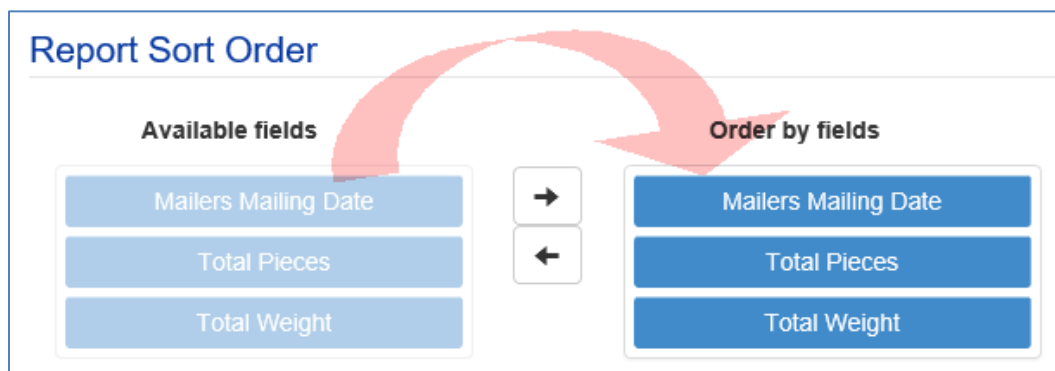
Order by fields

Done



The 'Mailing Mailing Date' field in the 'Fields' section automatically changes to 'ON' when the 'Mailing Mailing Date' field is set to 'ON' in the 'Summary By' section. This is normal.

- The field tiles are moved from the 'Available fields' stack to the 'Order by fields' stack, arranging the tiles in the desired order in the stack:



- The **Done** button is clicked to save the report definition.

The resulting report would display as follows:

Reporting ?

User-Defined Reports

Export to Excel

Export to PDF

Show

Example Summary 1

Mailers Mailing Date	Total Pieces	Total Weight
05/01/2016	1,687	179
06/06/2016	1,696	180
06/29/2016	1,691	180

5,074

539

1

50 items per page

1 - 3 of 3 items

Detail Report

If 'detail' is selected as the report type, the screen will update and display two sections: 'Fields'; and 'Report Sort Order':

Reporting ⓘ

Manage Report Definition - ✕

Report Definition Name* **Report Type**

Shared ☐ OFF

Fields

Job

Mailing Attributes Job Number ☐ OFF Job ID ☐ OFF

Postage Pieces Job Description ☐ OFF Mail.Dat File Name ☐ OFF

USPS Transaction Customer Ref ID ☐ OFF

Preparer

MailOwner

Permit Holders

Publications

PW Internal

Report Sort Order

Check order field to show subtotals

Available fields → Order by fields

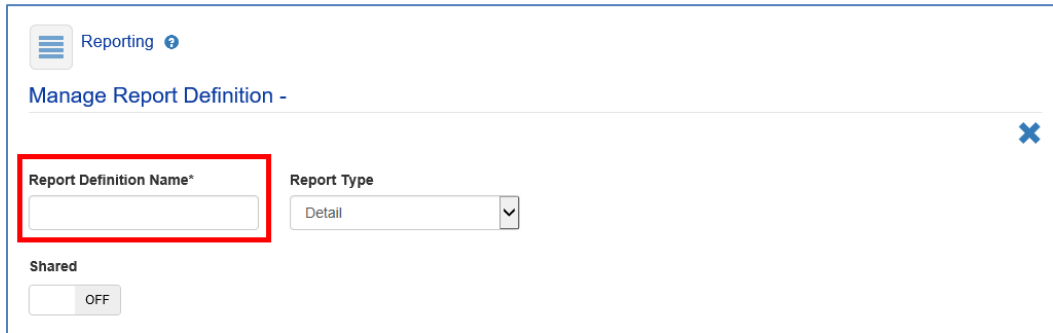
←

Done

- **Fields section:** Contains virtually all fields that make up a postage statement, organized into various categories. Any field may be selected to be displayed in the report (as a column). For a complete list of the fields available, refer to [APPENDIX 4](#);
- **Report Sort Order section:** Used to define the order and grouping of the selected fields within the report.

To construct a 'Detail' report definition, perform the following:

1. Enter the 'Report Definition Name' in the text box provided:



Reporting ?

Manage Report Definition -


Report Definition Name*

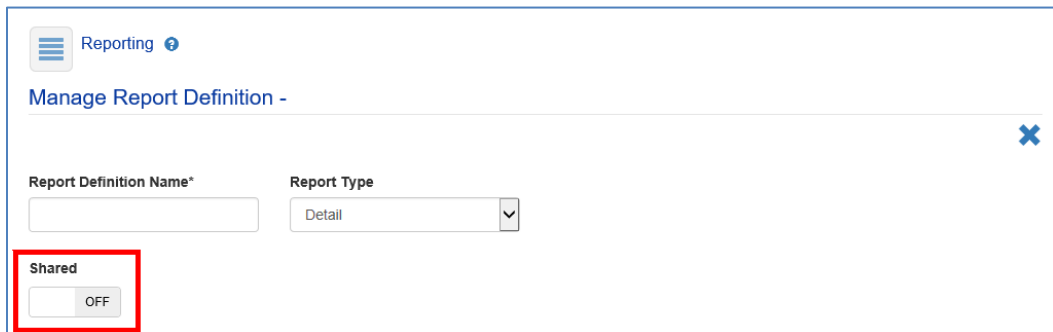
Report Type

Detail

Shared

OFF

2. If the report definition is to be made available to other users, click the **Shared** ON/OFF toggle button so that it displays 'ON' ():



Reporting ?

Manage Report Definition -


Report Definition Name*

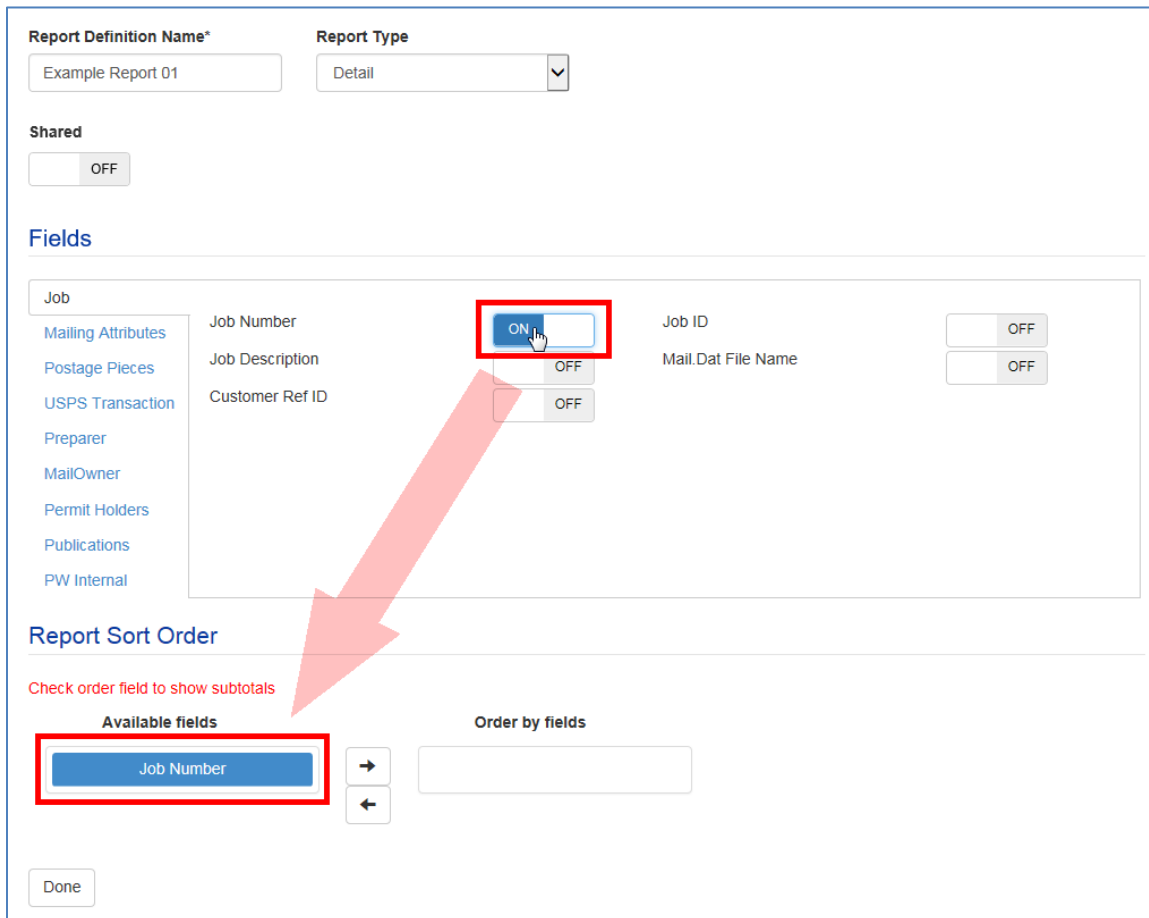
Report Type

Detail

Shared

OFF

3. Select the desired fields to be included in the report by clicking on the field name or its associated button. The ON/OFF toggle button will change to 'ON' () and a new tile with the field's name will be placed in the 'Available fields' stack located in the 'Report Sort Order' section of the screen:



Report Definition Name*
Example Report 01

Report Type
Detail

Shared
OFF

Fields

Field Name	Toggle
Job	ON
Mailing Attributes	OFF
Postage Pieces	OFF
USPS Transaction	OFF
Preparer	OFF
MailOwner	OFF
Permit Holders	OFF
Publications	OFF
PW Internal	OFF
Job ID	OFF
Mail.Dat File Name	OFF

Report Sort Order

Check order field to show subtotals

Available fields
Job Number

Order by fields

Done

- As additional fields are selected, they are added to the 'Available fields' stack in the order they are chosen:

The screenshot displays the 'Report Definition Name' and 'Report Type' fields at the top. Below them is a 'Shared' toggle set to 'OFF'. The 'Fields' section contains a list of categories on the left and a table of fields with toggle switches on the right. A red box highlights the 'Mail.Dat File Name' toggle, and a large red arrow points from it to the 'Available fields' list. In the 'Available fields' list, 'Mail.Dat File Name' is highlighted with a red box. The 'Order by fields' section is also visible.

Report Definition Name*
Example Report 01

Report Type
Detail

Shared
OFF

Fields

Job	Job Number	Job ID
Mailing Attributes	ON	ON
Postage Pieces	ON	ON
USPS Transaction	ON	ON
Preparer		
MailOwner		
Permit Holders		
Publications		
PW Internal		

Report Sort Order

Check order field to show subtotals

Available fields

- Job Number
- Job Description
- Customer Ref ID
- Job ID
- Mail.Dat File Name

Order by fields

5. After the fields are selected and their tiles have accumulated in the 'Available fields' stack, the tiles can be placed in the 'Order by fields' stack using either of the following methods:
 - a. Select a field by clicking on the tile (turning the tile dark blue), then click the right arrow:

Report Sort Order

Check order field to show subtotals

Available fields

Job Number

Job Description

Customer Ref ID

Job ID

Mail.Dat File Name

→

←

Order by fields



Report Sort Order

Check order field to show subtotals

Available fields

Job Number

Job Description

Customer Ref ID

Job ID

Mail.Dat File Name

→

←

Order by fields



Report Sort Order

Check order field to show subtotals

Available fields

Job Description

Customer Ref ID

Job ID

Mail.Dat File Name

→

←

Order by fields

Job Number

- b. Using the 'drag and drop' method, select a field by moving the mouse cursor over the desired tile in the 'Available fields' stack, press and hold the left mouse button, and drag the tile into the 'Order by fields' stack, then release the mouse button:

Report Sort Order

Check order field to show subtotals

Available fields

Job Number

Job Description

Customer Ref ID

Job ID

Mail.Dat File Name

→

←

Order by fields



Report Sort Order

Check order field to show subtotals

Available fields

Job Number

Job Description

Customer Ref ID

Job ID

Mail.Dat File Name

→

←

Order by fields



Report Sort Order

Check order field to show subtotals

Available fields

Job Description

Customer Ref ID

Job ID

Mail.Dat File Name

→

←

Order by fields

Job Number



Report Sort Order

Check order field to show subtotals

Available fields

Job Description

Customer Ref ID

Job ID

Mail.Dat File Name

→

←

Order by fields

Job Number



To remove a field tile from the 'Report Sort Order' section completely, the field must be turned 'OFF' in the 'Fields' section. The associated field tile will automatically be removed from the stack.

The field tiles that appear in both the 'Order by fields' and the 'Available fields' will be included in the report. The fields shown in the 'Order by fields' stack will appear first in the report, in the order they appear in the stack. The top-most field tile on the 'Order by fields' stack will be displayed as the left-most column on the report.

Any fields listed in the 'Available fields' stack appear in the report in a pre-determined order, but they will appear in the report *after* the fields listed in the 'Order by fields' stack. For this reason, it is recommended to move all the fields listed in the 'Available fields' stack to the 'Order by fields' stack to ensure the correct order of appearance in the report. After a tile is placed in the 'Order by fields' stack, it may be moved to a different position vertically within the same 'Order by fields' stack using the 'drag and drop' method described earlier.

After a field tile is placed in the 'Order by fields' stack, a small square box may display within the tile, which is a selectable checkbox known as the 'group by' selection. If the checkbox is selected (checked), the listing will be grouped by the associated field in the report and will display on the report as a major heading, with all listed statements sorted by that field.

- After the field tiles are set to their desired location within the 'Order by fields' stack, the **Done** button, located near the bottom of the web page, must be clicked to save the report definition:

Report Sort Order

Available fields

Order by fields

Job Number

Total Pieces

Net Postage Due

Total Weight

Done

Example: A user wishes to generate a list of postage statements that shows the 'Job Number', 'Job ID' and 'Job Description' that is grouped by the 'Mailer's Mailing Dates'. The user performs the following:

7. A 'Detail' report definition is configured that consists of the following:
 - a. In the 'Job' category of the 'Fields' section, the 'Job Number', 'Job ID' and 'Job Description' fields are selected (set to 'ON'):

Reporting ⓘ

Manage Report Definition -

Report Definition Name* Example Detail 1 **Report Type** Detail

Shared OFF

Fields

Job	Job Number	Job ID
Mailing Attributes	ON	ON
Postage Pieces	ON	OFF
USPS Transaction	OFF	OFF
Preparer		
MailOwner		
Permit Holders		
Publications		
PW Internal		

Report Sort Order

Check order field to show subtotals

Available fields	Order by fields
Job Number	
Job ID	
Job Description	

Done

- b. In the 'USPS Transaction' category of the 'Fields' section, the 'Mailer's Mailing Dates' field is selected (set to 'ON'):

The screenshot displays the 'Manage Report Definition' window. At the top, the 'Report Definition Name' is 'Example Detail 1' and the 'Report Type' is 'Detail'. The 'Shared' toggle is set to 'OFF'. The 'Fields' section is active, showing a list of fields with their respective status (ON/OFF). The 'Mailers Mailing Date' field is highlighted in yellow and set to 'ON'. A red arrow points from this field to the 'Report Sort Order' section. In the 'Report Sort Order' section, the 'Available fields' list includes 'Job Number', 'Job ID', 'Job Description', and 'Mailers Mailing Date'. The 'Mailers Mailing Date' field is highlighted in yellow and has been moved to the 'Order by fields' list. A 'Done' button is located at the bottom left.

Reporting

Manage Report Definition -

Report Definition Name* Example Detail 1 **Report Type** Detail

Shared OFF

Fields

Field	Status
CAPS Transaction Number	OFF
Transaction Number	OFF
Balance Before	OFF
CAPS Account	OFF
Mailers Mailing Date	ON
Closing Date	OFF
Clerk Initials	OFF
Mailing Group ID	OFF
Transaction Amount	OFF
Payment Date Time	OFF
Mail Arrival Date Time	OFF
PSID	OFF

Report Sort Order

Check order field to show subtotals

Available fields

- Job Number
- Job ID
- Job Description
- Mailers Mailing Date**

Order by fields

Done

8. After the fields are selected (set to 'ON') in the 'Fields' section, the field tiles are moved from the 'Available fields' stack to the 'Order by fields' stack, arranging the tiles in the desired order in the stack:

Report Sort Order

Check order field to show subtotals

Available fields

- Job Number
- Job ID
- Job Description
- Mailers Mailing Date

→

←

Order by fields

- Job Number ☐
- Job ID ☐
- Job Description ☐
- Mailers Mailing Date ☐

9. Since the user wishes to group the statements by the 'Mailers Mailing Date', the corresponding field tile's 'group by' checkbox is selected (checked):

Report Sort Order

Check order field to show subtotals

Available fields

→

←

Order by fields

- Job Number ☐
- Job ID ☐
- Job Description ☐
- Mailers Mailing Date ☒

i Some fields will not be available for selection. In this case, there will be a '⊗' symbol in place of a checkbox.

The resulting report with the statements grouped by 'Mailers Mailing Date' would display as follows:

Example Report 01

Job Number	Job ID	Job Description	Mailers Mailing Date
▲ Mailers Mailing Date: /Date(1456858800000)/			
2016_03NL001	00000631	2016_03NL001	03/01/2016
2016_03NL002	00000630	2016_03NL002	03/01/2016
2016_03NL003	00000629	2016_03NL003	03/01/2016
2016_03NL004	00000628	2016_03NL004	03/01/2016
2016_03NL005	00000627	2016_03NL005	03/01/2016
			Count: 5
▲ Mailers Mailing Date: /Date(1457899200000)/			
NPF2016PRE	00000632	NPF2016PRE	03/13/2016
			Count: 1
▲ Mailers Mailing Date: /Date(1459108800000)/			
			Total count: 21

1 - 21 of 21 items
 50 items per page

If the 'group by' checkbox on the 'Mailers Mailing Date' was not selected, the data returned in the report would be displayed in columns, i.e. the four fields arranged in the order they appear in the 'Order by fields' stack (i.e. 'Job Number', 'Job ID', 'Job Description', and 'Mailers Mailing Date', respectively):

Example Report 01

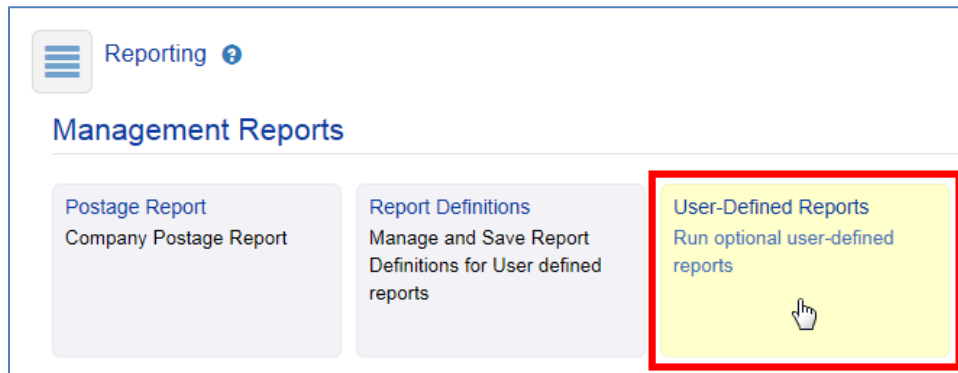
Job Number	Job ID	Job Description	Mailers Mailing Date
2016_03NL001	00000631	2016_03NL001	03/01/2016
2016_03NL002	00000630	2016_03NL002	03/01/2016
2016_03NL003	00000629	2016_03NL003	03/01/2016
2016_03NL004	00000628	2016_03NL004	03/01/2016
2016_03NL005	00000627	2016_03NL005	03/01/2016
2016_04NL001	00000637	2016_04NL001	03/27/2016
2016_04NL002	00000636	2016_04NL002	03/27/2016
2016_04NL003	00000635	2016_04NL003	03/27/2016
2016_04NL004	00000634	2016_04NL004	03/27/2016
2016_04NL005	00000633	2016_04NL005	03/27/2016
2016_05NL001	00000653	2016_05NL001	05/01/2016

1 - 21 of 21 items
 50 items per page

User-Defined Reports

Once a report definition is created, a report may be generated.

To generate a user-defined report, navigate to the *Management Reports* screen and select the 'User-Defined Reports' tile:



The *User-Defined Reports* screen will display:

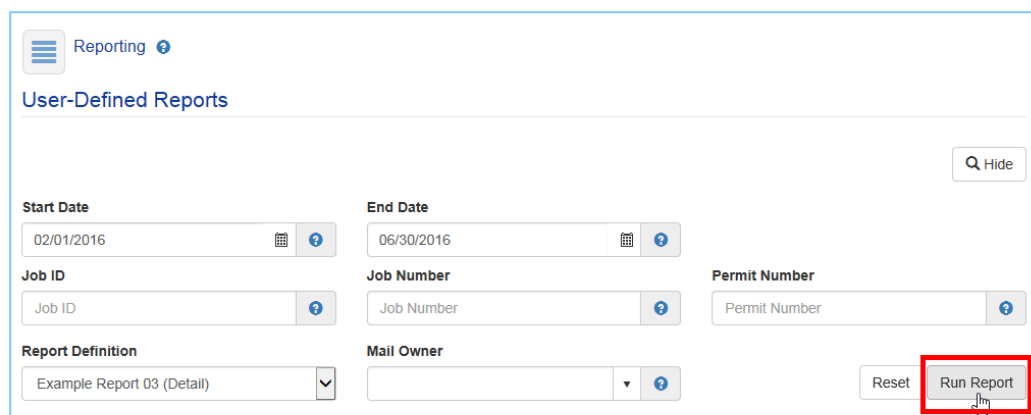
 A screenshot of the 'User-Defined Reports' screen. At the top, there is a 'Reporting' header with a menu icon and a help icon. Below it, the title 'User-Defined Reports' is displayed. On the right side, there is a 'Hide' button with a magnifying glass icon. The main area contains several filter fields: 'Company' (a dropdown menu with 'All' selected), 'Start Date' (a date field with '09/06/2016' and a calendar icon), 'End Date' (a date field with '09/06/2016' and a calendar icon), 'Job ID' (a text field with a help icon), 'Job Number' (a text field with a help icon), and 'Permit Number' (a text field with a help icon). Below these is a 'Report Definition' dropdown menu with 'fgdfgdf' selected. At the bottom right, there are two buttons: 'Reset' and 'Run Report'.

The *User-Defined Reports* screen contains a number of filters in addition to the ability to select a previously-created report definition:

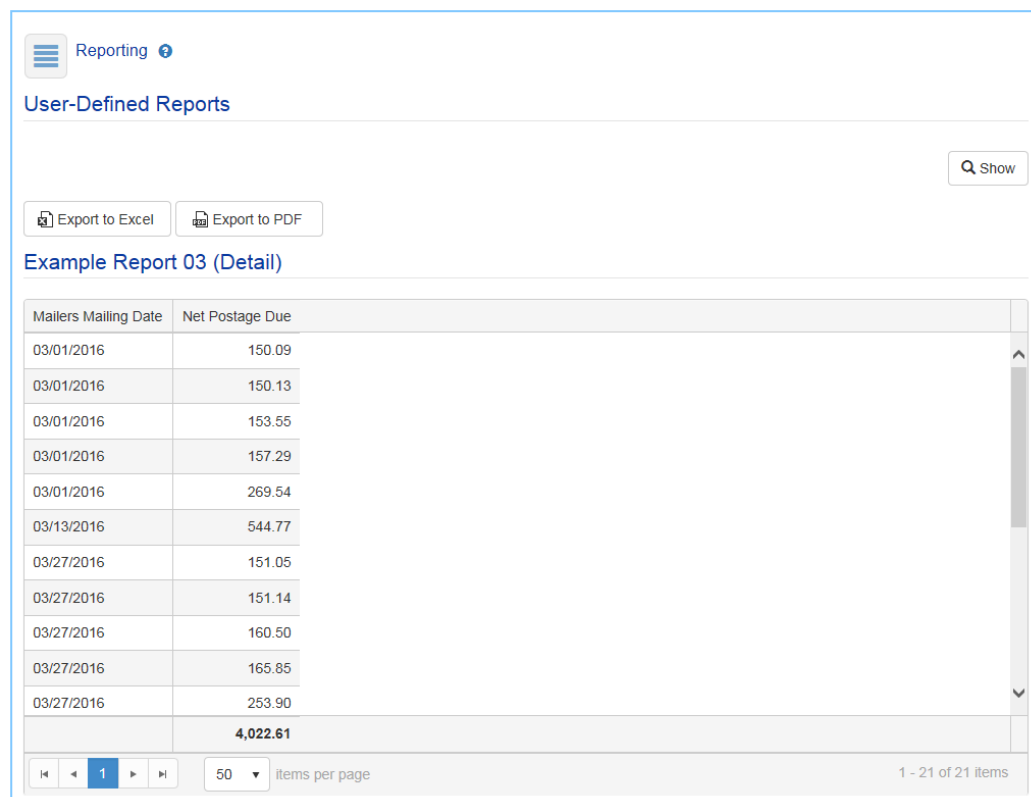
- **Company:** A drop down list containing the company names associated with the mail owner. The default selection is 'All';
- **Start Date and End Date:** The first date and last date that is to be included in the report;
- **Job ID, Job Number and Permit Number:** As many of these filters may be used to include or exclude the desired data in a report;
- **Report Definition:** A drop down list of previously created report definitions. Select the 'User-Defined Reports' module to generate the report;

- **Reset button:** Clicking this button clears the filters and resets the start and end dates to the current date;
- **Run Report button:** Clicking this button causes a report to be generated using the currently configured filters and the selected 'Report Definition';
- **Show/Hide button:** Shows or hides the filters. When the **Refresh** button is clicked, as the report is displayed, the filters are automatically hidden.

Once the filter settings are configured and the 'Report Definition' is selected, the **Run Report** button must be clicked to generate a report on the display. If any data is generated, the filters are automatically hidden, the report is displayed, and the **Export to Excel** and **Export to PDF** buttons are displayed:



The screenshot shows the 'Reporting' section with the 'User-Defined Reports' form. The form includes fields for Start Date (02/01/2016), End Date (06/30/2016), Job ID, Job Number, Permit Number, Report Definition (Example Report 03 (Detail)), and Mail Owner. The 'Run Report' button is highlighted with a red box, and a mouse cursor is clicking it. A 'Reset' button is also visible.

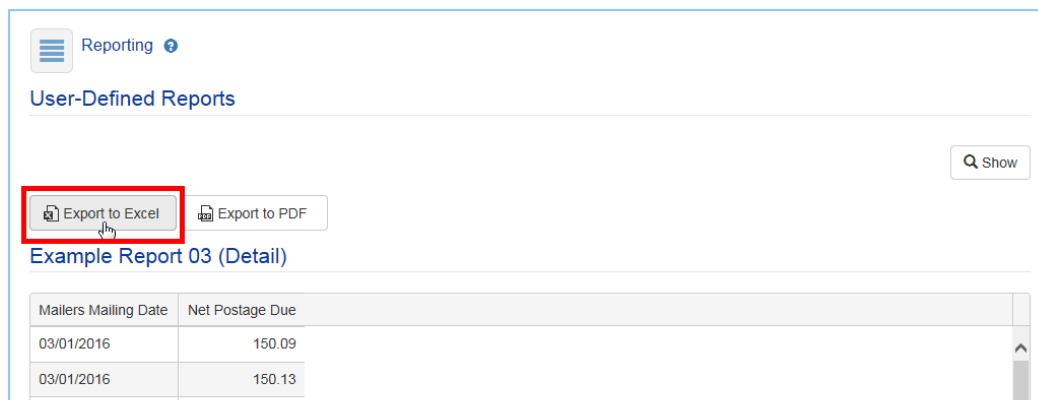



The screenshot shows the 'Reporting' section with the 'User-Defined Reports' form. The 'Run Report' button has been clicked, and the report is displayed. The 'Export to Excel' and 'Export to PDF' buttons are visible. The report title is 'Example Report 03 (Detail)'. The table shows the following data:

Mailing Date	Net Postage Due
03/01/2016	150.09
03/01/2016	150.13
03/01/2016	153.55
03/01/2016	157.29
03/01/2016	269.54
03/13/2016	544.77
03/27/2016	151.05
03/27/2016	151.14
03/27/2016	160.50
03/27/2016	165.85
03/27/2016	253.90
Total	4,022.61

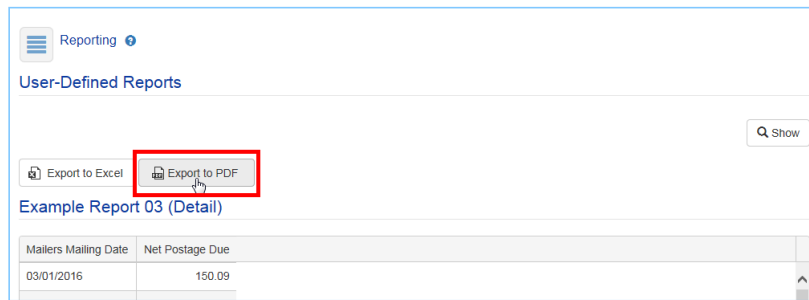
The table is paginated, showing 1 of 21 items. The 'Items per page' is set to 50.


After a report has been generated, the **Export to Excel** button may be used to generate an Excel format file of the displayed report:



Example Report 03 (Detail)		
Example Report 03 (Detail)		06/30/2016 04:06 AM
From 02/01/2016 - Thru 06/30/2016		
Company Name: Window Book, Inc		
Mailers Mailing Date	Net Postage Due	
03/01/2016	150.09	
03/01/2016	150.13	
03/01/2016	153.55	
03/01/2016	157.29	
03/01/2016	269.54	
03/13/2016	544.77	
03/27/2016	151.05	
03/27/2016	151.14	
03/27/2016	160.50	
03/27/2016	165.85	
03/27/2016	253.90	
05/02/2016	129.73	
05/02/2016	153.78	
05/02/2016	158.46	
05/02/2016	165.16	
05/02/2016	248.02	
06/07/2016	150.98	
06/07/2016	153.17	
06/07/2016	153.71	
06/07/2016	167.76	
06/07/2016	234.03	
Totals	4,022.61	
Total Count: 21		

After a report has been generated, the **Export to PDF** button may be used to generate an PDF format file of the displayed report:



 *Example Report 03 (Detail)* 06/30/2016 04:19 AM

From 02/01/2016 - Thru 06/30/2016

Company Name: Window Book, Inc

Mailing Mailing Date	Net Postage Due
03/01/2016	150.09
03/01/2016	150.13
03/01/2016	153.55
03/01/2016	157.29
03/01/2016	269.54
03/13/2016	544.77
03/27/2016	151.05
03/27/2016	151.14
03/27/2016	160.50
03/27/2016	165.85
03/27/2016	253.90
05/02/2016	129.73
05/02/2016	153.78
05/02/2016	158.46
05/02/2016	165.16
05/02/2016	248.02
06/07/2016	150.98
06/07/2016	153.17
06/07/2016	153.71
06/07/2016	167.76
06/07/2016	234.03
Totals	4,022.61

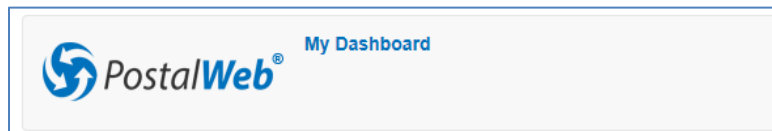
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APPENDIX 1

ROLES AND THEIR AVAILABLE OPTIONS

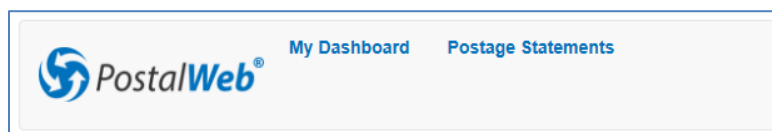
The following tables show the categories and their options that are available for the various roles. For a detailed description of the roles, refer to the [ROLES](#) section in this guide.

For User and IT Personnel roles who do not have the Mail Owner application selected:



My Dashboard
My Profile
Member Profile
Personal Info
Change
Password
Security
Question
API Credentials
Manage
Subscriptions
My Dashboard
Notifications


For User and IT Personnel roles who do have the Mail Owner application selected:




My Dashboard
My Profile
Member Profile
Personal Info
Change
Password
Security
Question
API Credentials
Manage
Subscriptions
My Dashboard
Notifications

Postage Statements
Postage Statements
API Credentials

For an Administrator role that does not have the Mail Owner application selected:


 My Dashboard Mail Owner	
My Dashboard My Profile Member Profile Personal Info Change Password Security Question API Credentials Manage Subscriptions My Dashboard Notifications	Mail Owner My Profile Member Profile Personal Info Change Password Security Question API Credentials Manage Subscriptions My Dashboard Notifications

For an Administrator role that does have the Mail Owner application selected:

 My Dashboard Postage Statements Mail Owner		
My Dashboard My Profile Member Profile Personal Info Change Password Security Question API Credentials Manage Subscriptions My Dashboard Notifications	Postage Statements Mail Owner Info Locations Invite Users Invitations Manage Users Services Postage Statements API Credentials	Mail Owner Mail Owner Info Locations Invite Users Invitations Manage Users Services Postage Statements API Credentials

Shaded cells indicate additional options for Administrators only.

For an Administrator role in which the EDocs application is selected and the EDOCS Reporting option is enabled:

 My Dashboard Postage Statements Mail Owner Reporting			
My Dashboard My Profile Member Profile Personal Info Change Password Security Question API Credentials Manage Subscriptions My Dashboard Notifications	Postage Statements Mail Owner Info Locations Invite Users Invitations Manage Users Services Postage Statements API Credentials	Mail Owner Mail Owner Info Locations Invite Users Invitations Manage Users Services Postage Statements API Credentials	Reporting Mail Owner Reports Management Reports Postage Report Report Definitions User-Defined Reports

Shaded cells indicate additional options for Administrators only.

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APPENDIX 2

TROUBLESHOOTING LOGIN PROBLEMS

This troubleshooting section assumes the user has verified that the login credentials being used are correct and valid.

A common reason for a failed login is that the browser's security and/or privacy settings are set too high. If the device being used is controlled through a company that has an IT department, contact the IT department for assistance.



Users should defer to their own company's policies regarding security and browser settings.

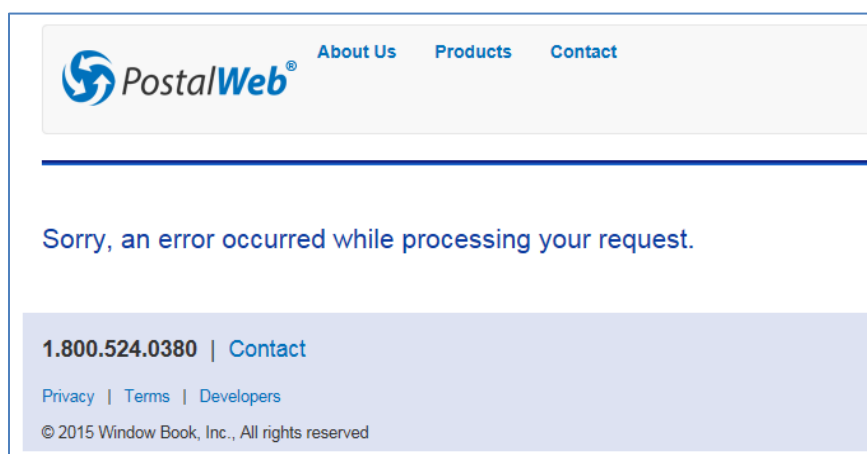
If an IT department is not available, refer to the following troubleshooting tips for assistance.

There are two general types of problems that may be encountered after clicking the **Log In** button (especially if logging in for the first time):

- A general error is displayed; or
- The website appears to freeze or stall without completing the login.

ERROR DISPLAYS AFTER THE LOGIN BUTTON IS CLICKED


If an error is shown similar to the following screen; the following are possible solutions:

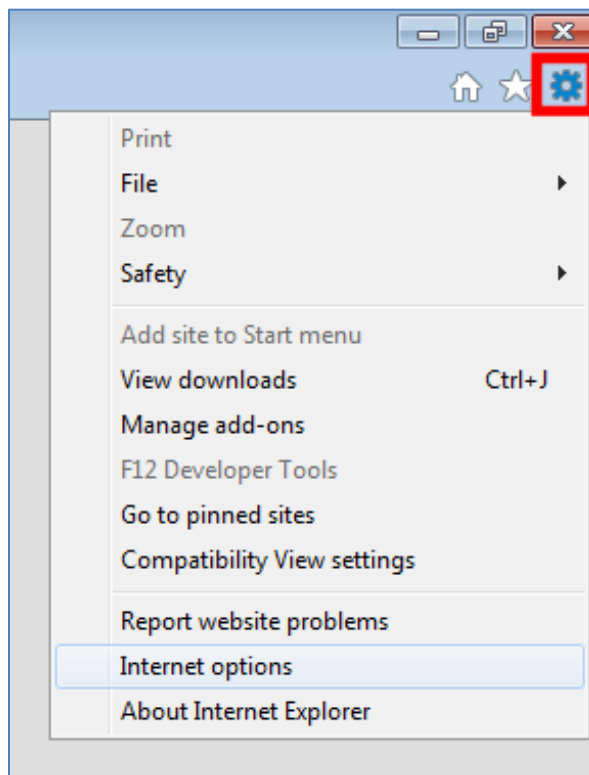


Internet Explorer Users

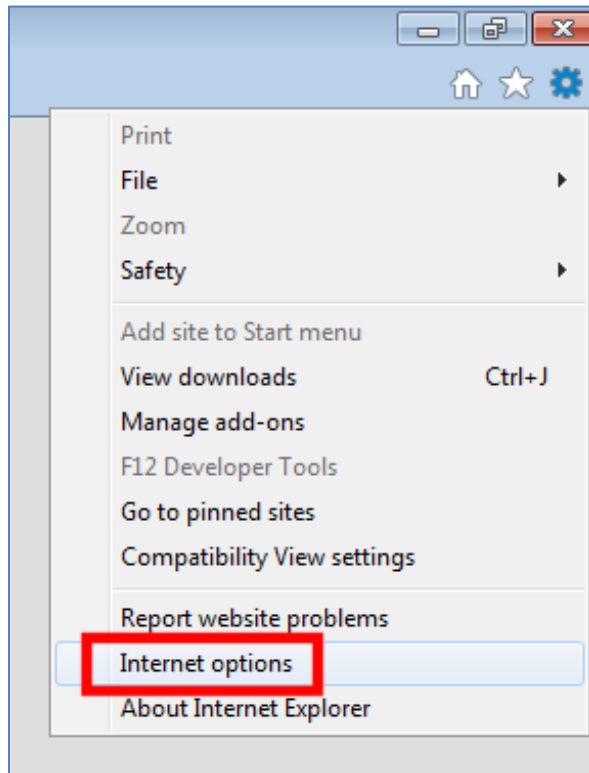
One solution may be to reduce the security settings of the browser, if possible.

 ***The following instructions are for Internet Explorer 11.***

1. Open Internet Explorer.
2. Click the gear icon  in the upper right corner of the browser window:

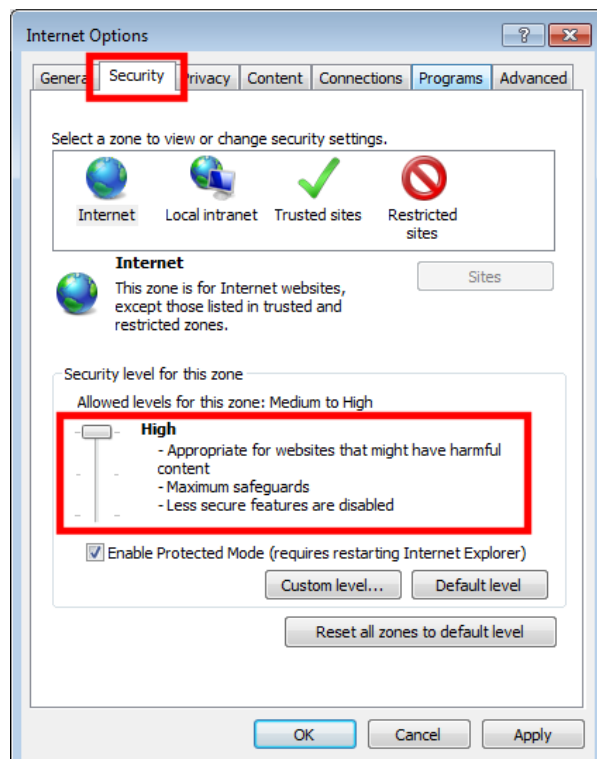


3. A menu will display. Select 'Internet options':

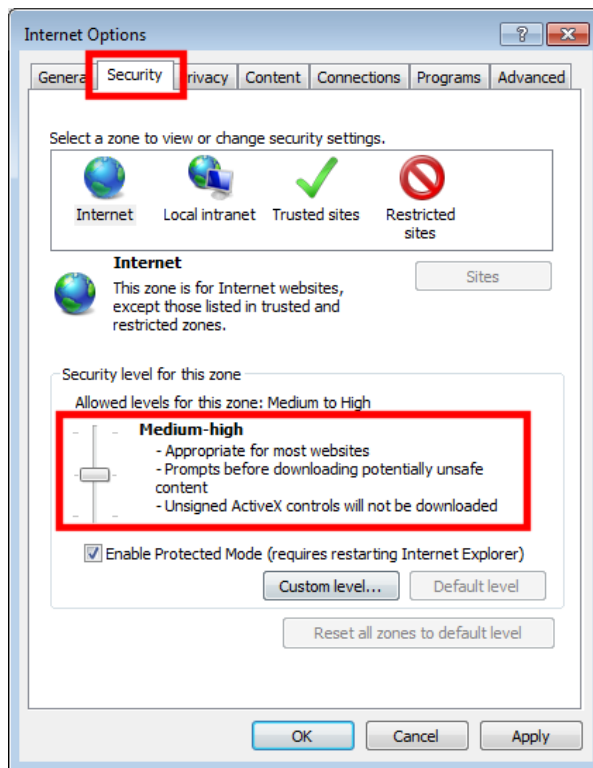


 **Other versions of Internet Explorer have different methods to display the 'Internet Options'.**

4. The *Internet Options* dialog box will open. Click the 'Security' tab:



5. Check the Security level setting. If the security level setting is at 'High', attempt to slide the control down to 'Medium' (the default setting):




Users should defer to their own company's policies regarding security and browser settings.

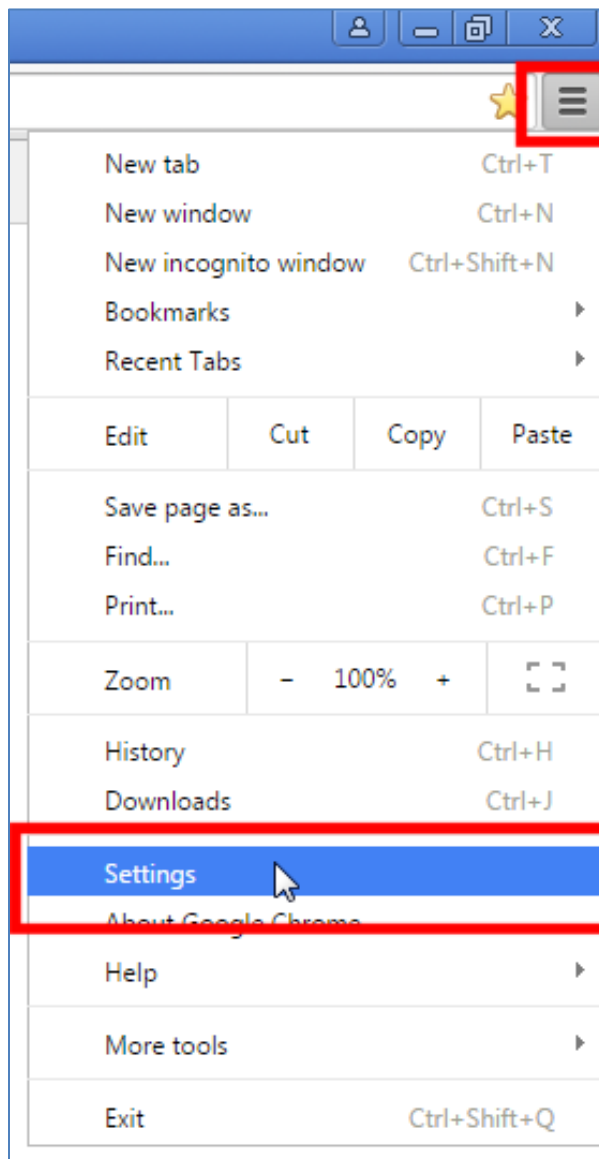


Windows permissions for the credentials used to log on to the computer that the browser resides on may be set so that this control is ghosted and/or cannot be changed. In this case someone with the appropriate permissions must be contacted to change the setting.

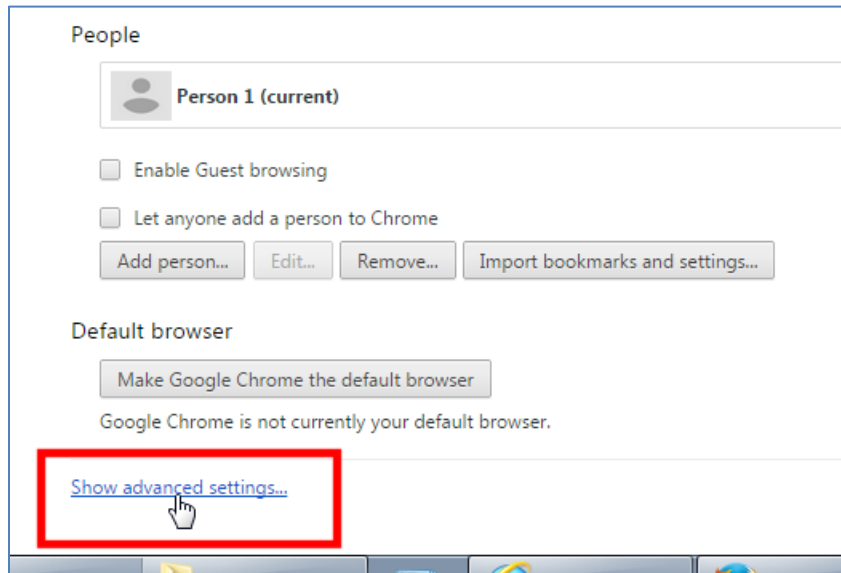
Chrome Users

An error may be displayed if JavaScript has been disabled. To check the JavaScript setting, do the following:

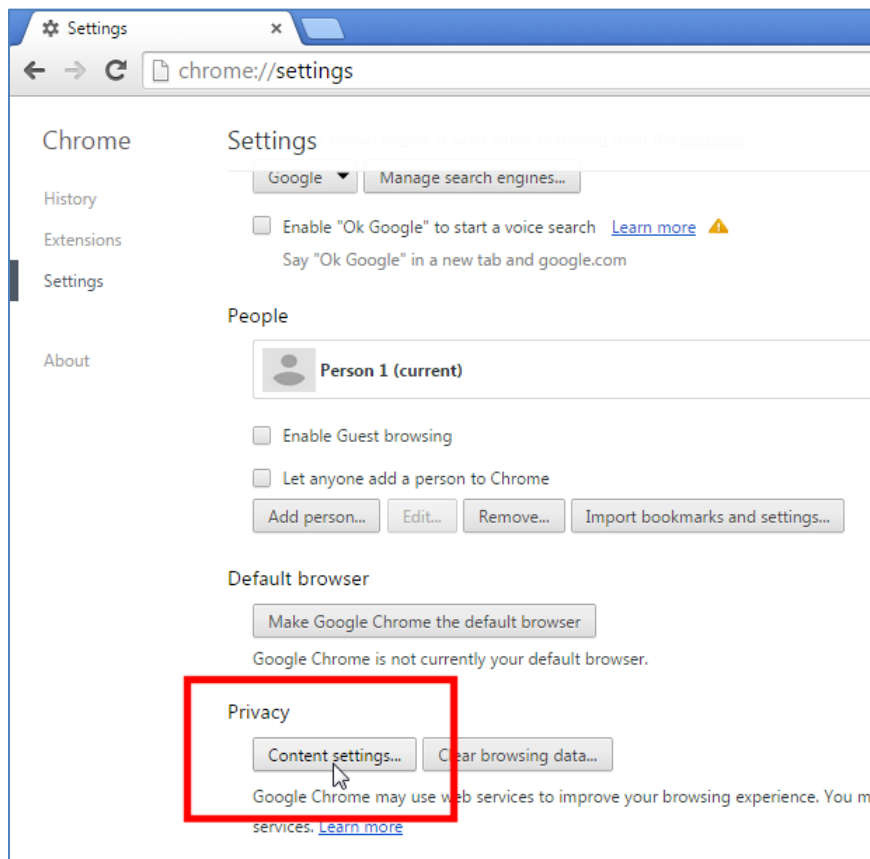
1. Open the Chrome browser.
2. Click on the  icon in the upper right corner of the browser window.
3. Select 'Settings' on the dialog box that opens:



- At the bottom of the web page, click the 'Show advanced settings' link:

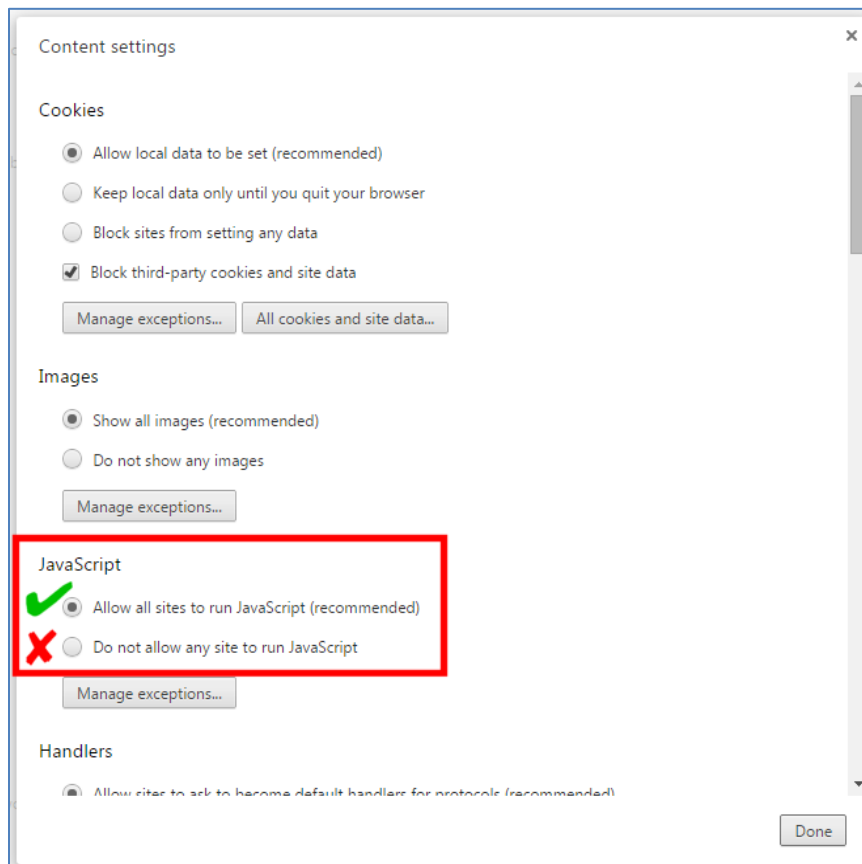


- Find the 'Privacy' section and click the **Content settings...** button:



6. On the screen that opens, check the 'JavaScript' setting.

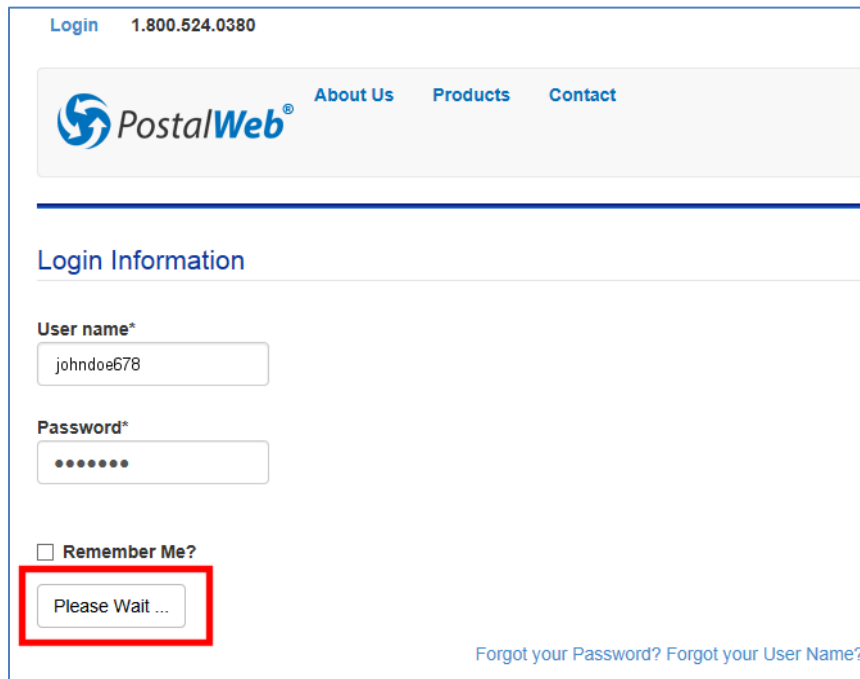
Make sure the 'Do not allow any site to run JavaScript' is *not* selected. If you must keep the setting at 'Do not allow any site to run JavaScript', then use the **Manage Exceptions** button to add the PostalWeb site:



Users should defer to their own company's policies regarding security and browser settings.

FREEZING OR STALLING AFTER THE LOGIN BUTTON IS CLICKED

If the PostalWeb site appears to ‘stall’ or ‘freeze’ after clicking the **Log In** button and the ‘Please Wait’ text is displayed for more than 30 seconds, check the following (based on the browser being used):




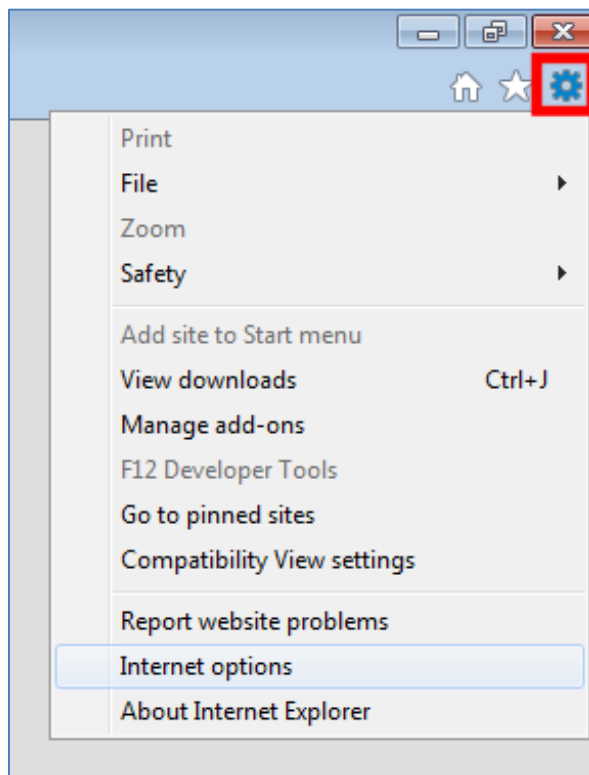
The screenshot shows the PostalWeb login interface. At the top, there is a header with the 'Login' link and the phone number '1.800.524.0380'. Below this is a navigation bar with the PostalWeb logo and links for 'About Us', 'Products', and 'Contact'. The main section is titled 'Login Information' and contains two input fields: 'User name*' with the text 'johndoe678' and 'Password*' with masked characters. Below these fields is a checkbox labeled 'Remember Me?'. A red rectangular box highlights a button labeled 'Please Wait ...' located below the 'Remember Me?' checkbox. At the bottom right of the form, there are links for 'Forgot your Password?' and 'Forgot your User Name?'.

Internet Explorer Users

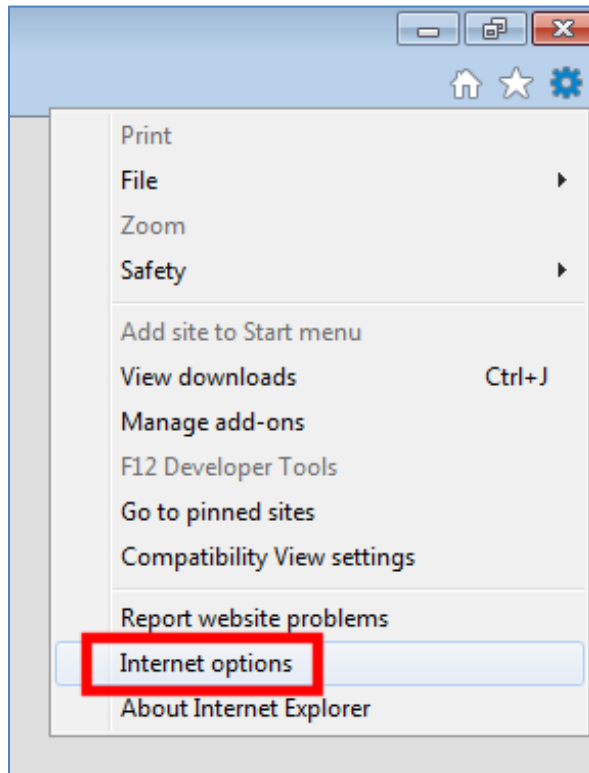
The Internet Explorer 'Privacy' settings may be set too high.

 **The following instructions are for Internet Explorer 11.**

1. Open Internet Explorer;
2. Click on the gear icon  in the upper right corner of the browser window:

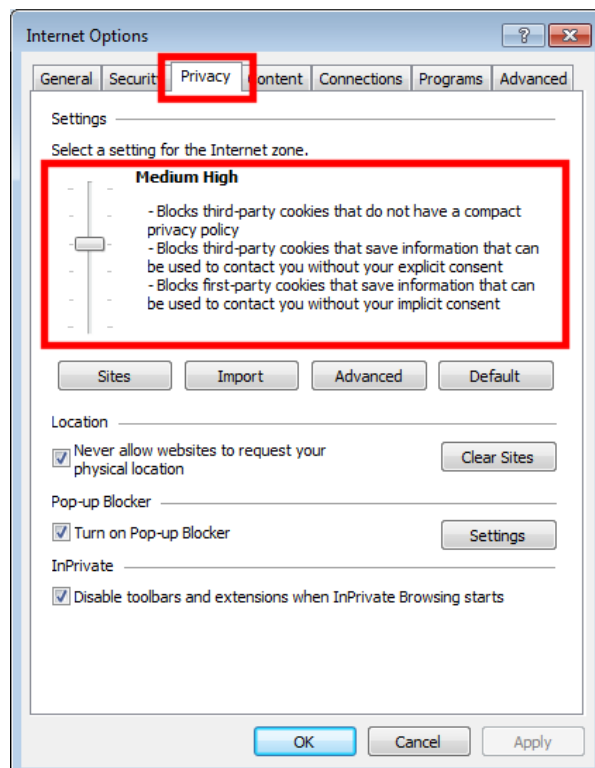


3. A menu will display. Select 'Internet options':

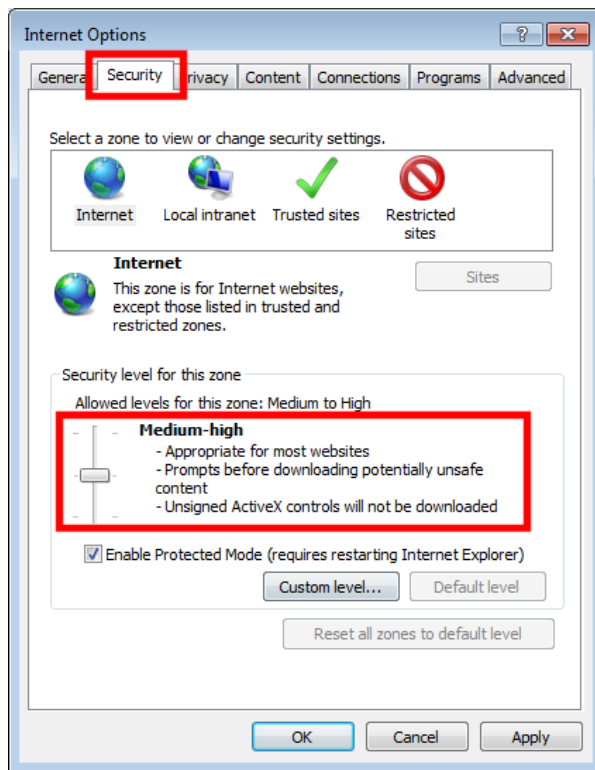


 **Other versions of Internet Explorer have different methods to get to the 'Internet options'.**

4. The *Internet Options* dialog box will open. Click the 'Privacy' tab:



5. If the setting is higher than 'Medium High', the PostalWeb site will not be able to use cookies and will stall or freeze upon login. If possible, select a setting no higher than 'Medium High':




Users should defer to their own company's policies regarding security and browser settings.

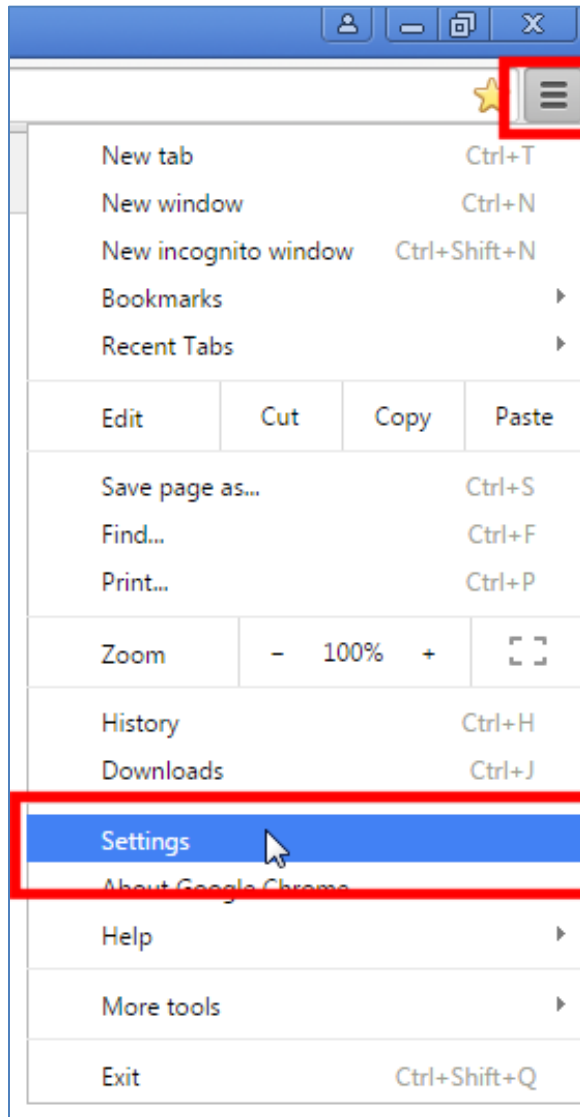


Windows permissions for the credentials used to log on to the computer that the browser resides on may be set so that this control is ghosted and/or cannot be changed. In this case someone with the appropriate permissions must be contacted to change the setting.

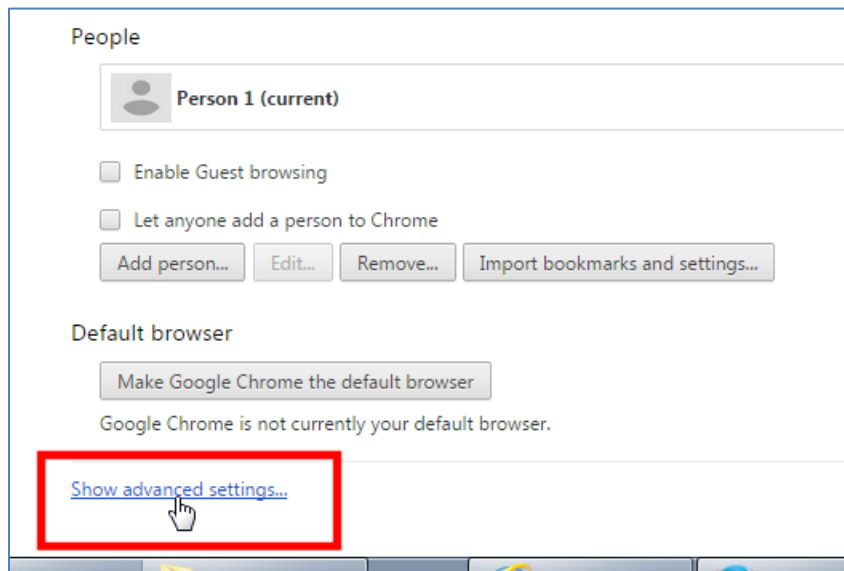
Chrome Users

To check the cookie settings in Chrome, do the following:

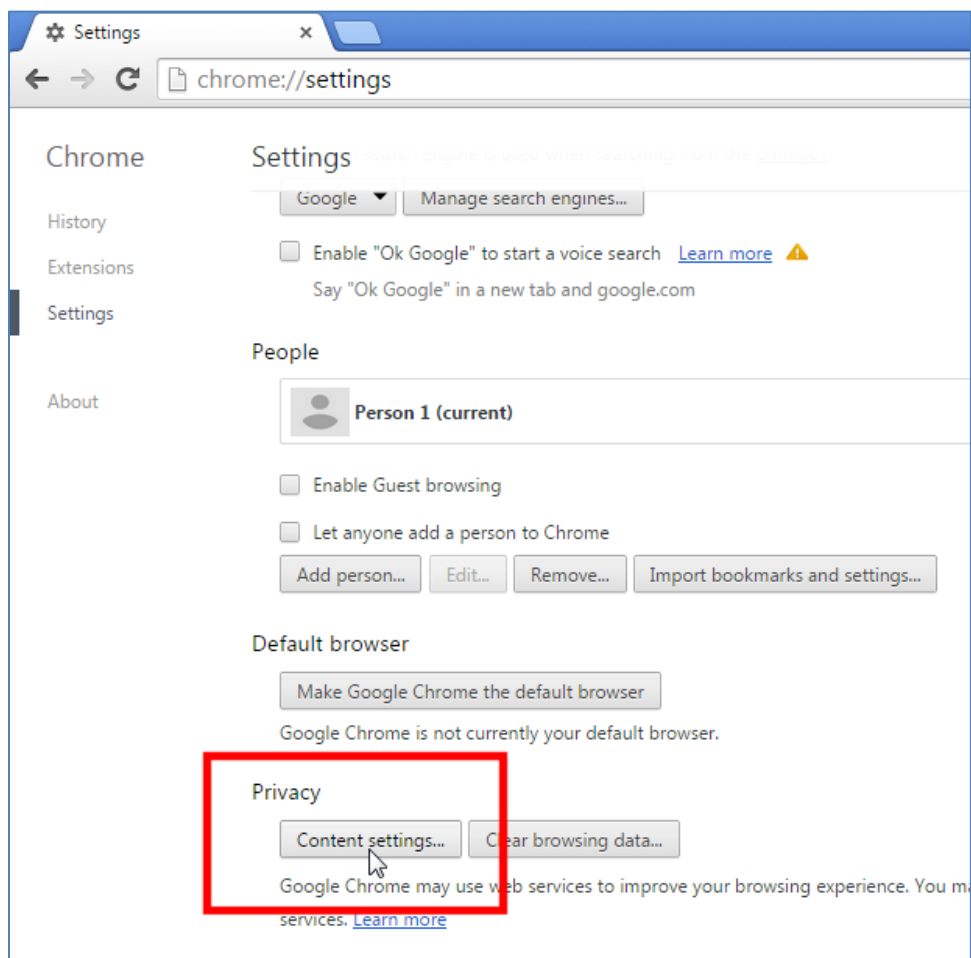
1. Open the Chrome browser.
2. Click on the  icon in the upper right corner of the browser window.
3. Select 'Settings' on the dialog box that opens:



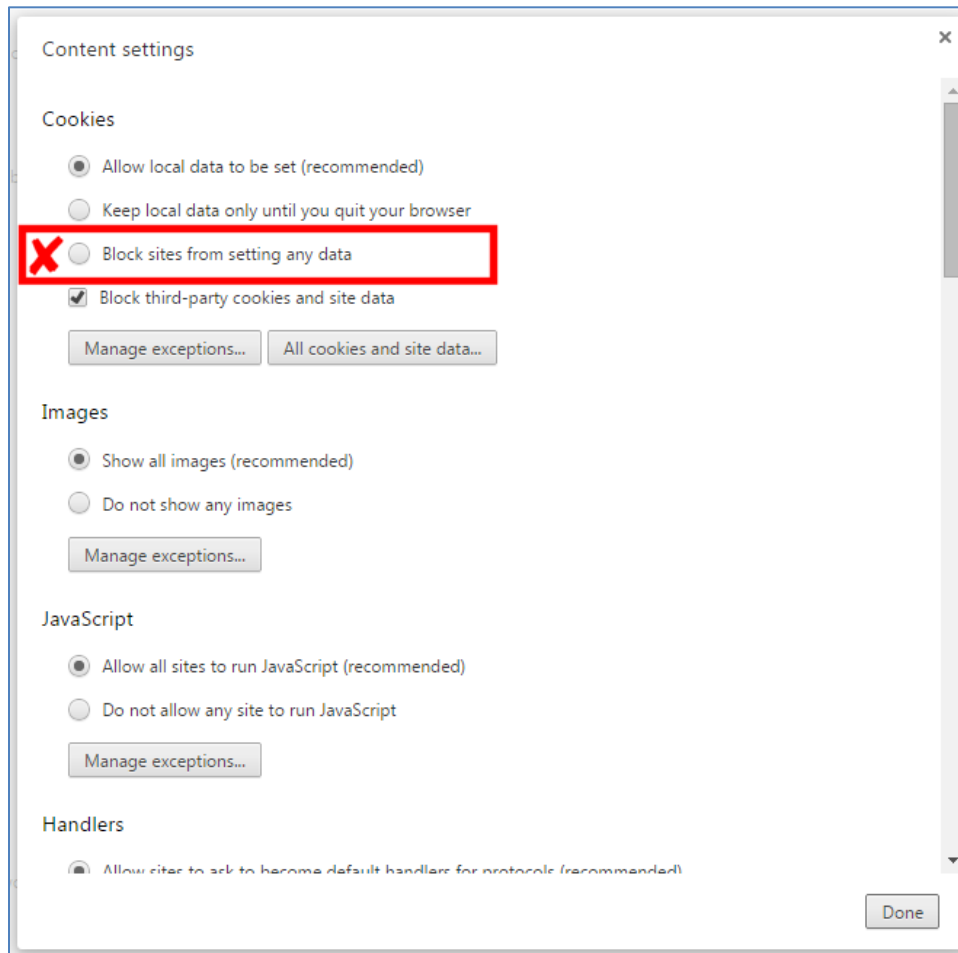
4. At the bottom of the web page, click the 'Show advanced settings' link:



5. Find the 'Privacy' section and click the **Content settings...** button:

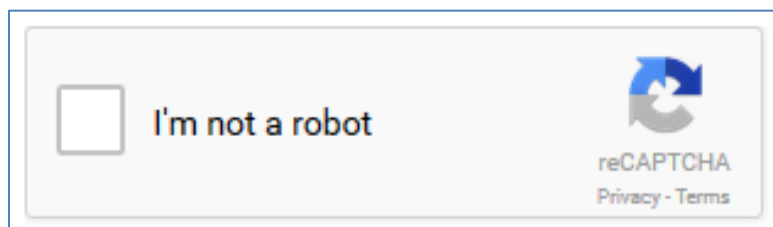


The *Content settings* screen will open showing the 'Cookies' settings. Verify the 'Block sites from setting any data' is NOT selected. The 'Block sites from setting any data' selection will prevent PostalWeb from completing the login process.:



APPENDIX 3

‘I’m not a robot’ WIDGET DOES NOT APPEAR IN BROWSER



In some instances, the ‘I’m not a robot’ widget does not display in the web browser. A common reason for this problem is the browser’s security and/or privacy settings are set too high. If the device being used to access the PostalWeb site is controlled through a company that has an IT department, contact the IT department for assistance.



Users should defer to their own company’s policies regarding security and browser settings.

If an IT department is not available, refer to the following troubleshooting tips for assistance.


The ‘I’m not a robot’ widget often appears at the beginning of a process such as resetting a password or retrieving a user name. The ‘I’m not a robot’ widget must be completed before continuing with the process at hand.

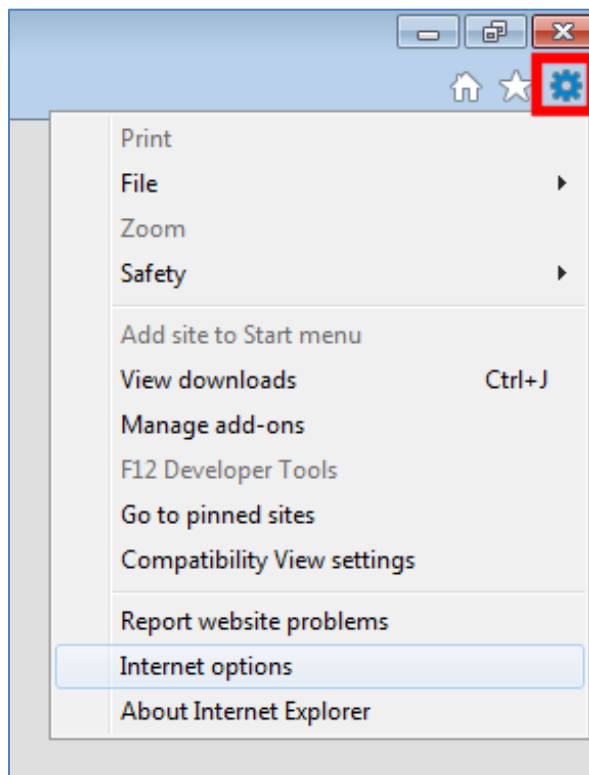
Under certain circumstances typically involving security settings, the widget may be prevented from being displayed in the browser without any indication that it has been prevented from doing so. In this case, when the **Next** or **Done** button is clicked, an error will likely occur due to the fact that the ‘I’m not a robot’ widget has not been successfully completed, even though it is not displayed. It must therefore be displayed so that it can be completed.

Internet Explorer Users

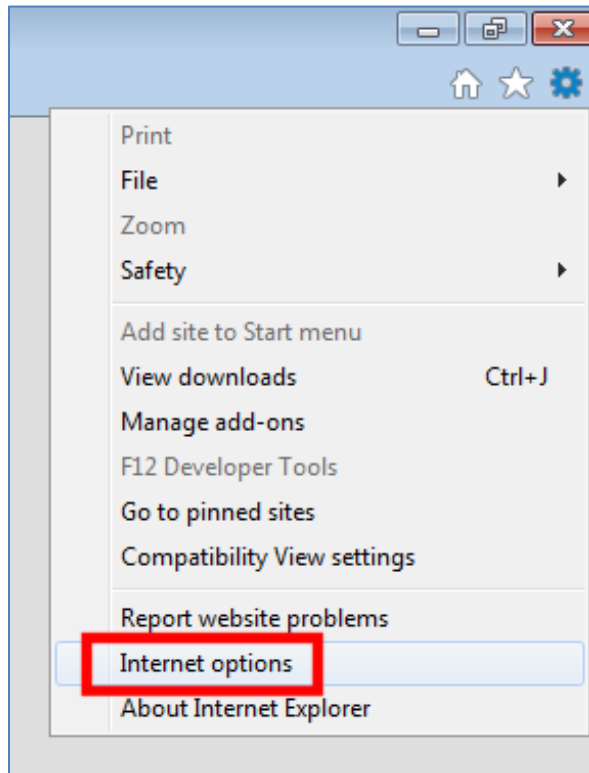
One solution may be to reduce the security settings of the browser, if possible.

 ***The following instructions are for Internet Explorer 11.***

1. Open Internet Explorer.
2. Click the gear icon  in the upper right corner of the browser window:

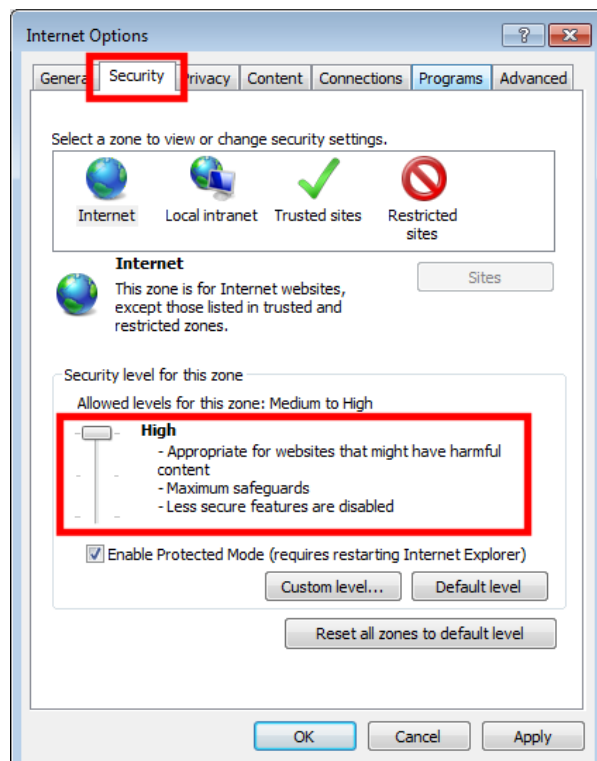


3. A menu will display. Select 'Internet options':



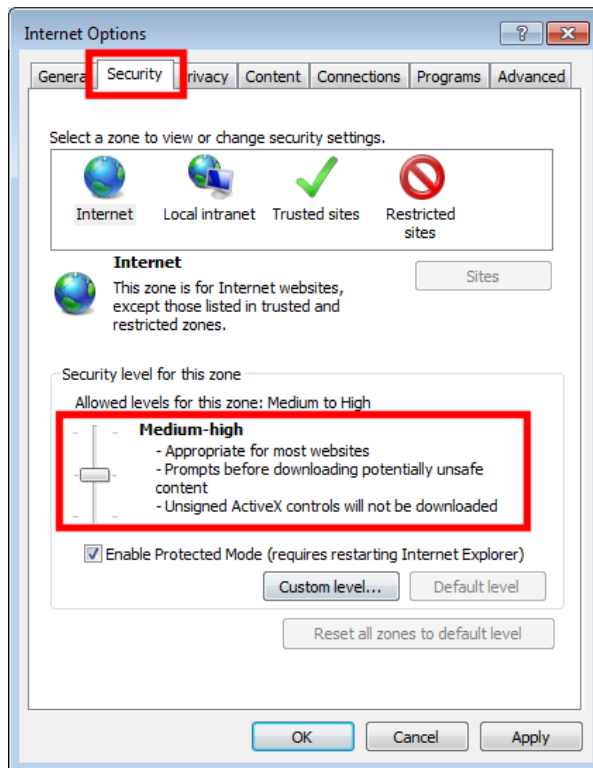
 **Other versions of Internet Explorer have different methods to display the 'Internet Options'.**

4. The *Internet Options* dialog box will open. Click the 'Security' tab:



5. Check the Security level setting.

If the security level setting is at 'High', attempt to slide the control down to 'Medium' (the default setting):




Users should defer to their own company's policies regarding security and browser settings.

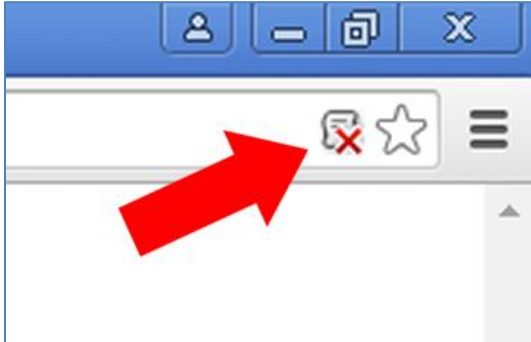



Windows permissions for the credentials used to log on to the computer that the browser resides on may be set so that this control is ghosted and/or cannot be changed. In this case someone with the appropriate permissions must be contacted to change the setting.

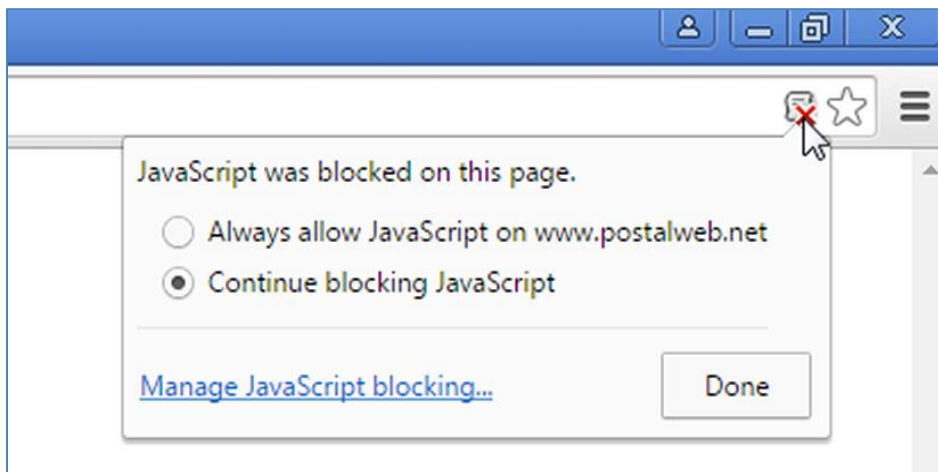
If the control cannot be changed, then attempt to add the postalweb.net website to the 'Trusted sites' list.

Chrome Users

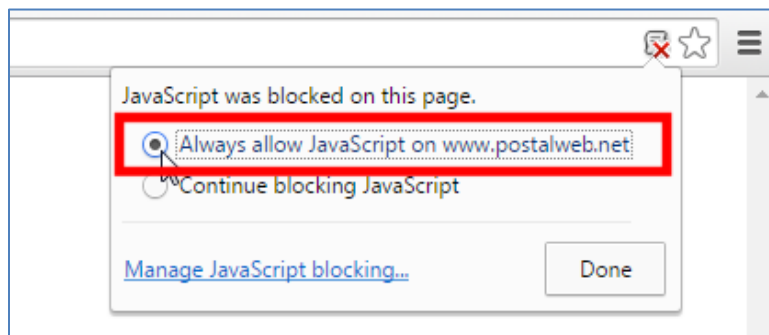
The 'I'm not a robot' widget may be prevented from displaying if JavaScript has been disabled. An indication of this condition is the display of the icon () located in the upper right corner of the browser window when a page is navigated to that would normally display the 'I'm not a robot' widget:




The blocking of JavaScript can be selectively turned off for the postalweb.net site (thus allowing the 'I'm not a robot' to be displayed) by placing the mouse cursor over the icon () and left-clicking the mouse. A box will open giving the user a choice of selectively enabling JavaScript only on www.postalweb.net pages:




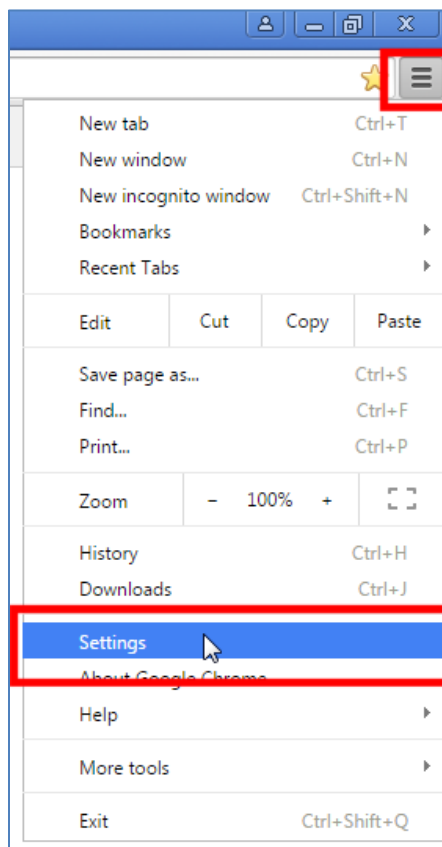
To allow the 'I'm not a robot' widget to appear, the 'Always allow JavaScript on www.postalweb.net' selection must be selected (clicked):



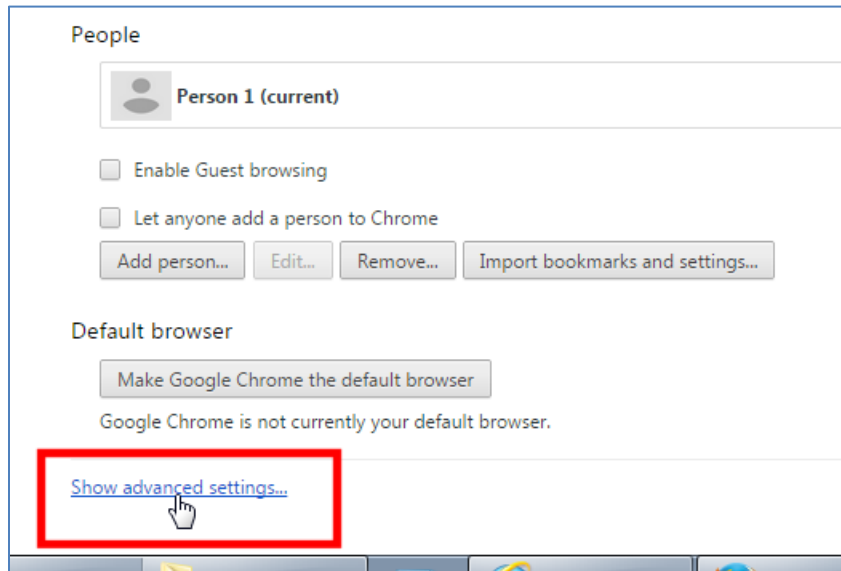
After the selection is made to allow JavaScript on www.postalweb.net, the currently displayed page must be reloaded via the reload button (). The 'I'm not a robot' widget should now be displayed and can be completed.

To inspect and manage the JavaScript setting for both general browsing and also for individual sites, do the following:

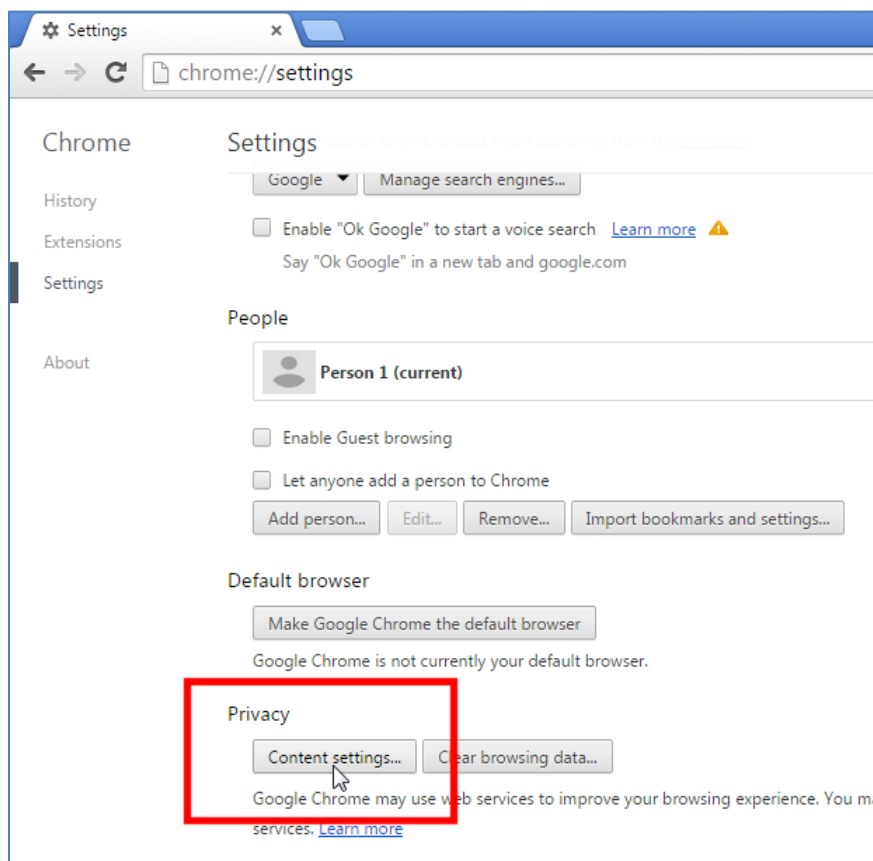
1. Open the Chrome browser.
2. Click on the icon () in the upper right corner of the browser window.
3. Select 'Settings' on the dialog box that opens:



4. At the bottom of the web page, click the 'Show advanced settings' link:

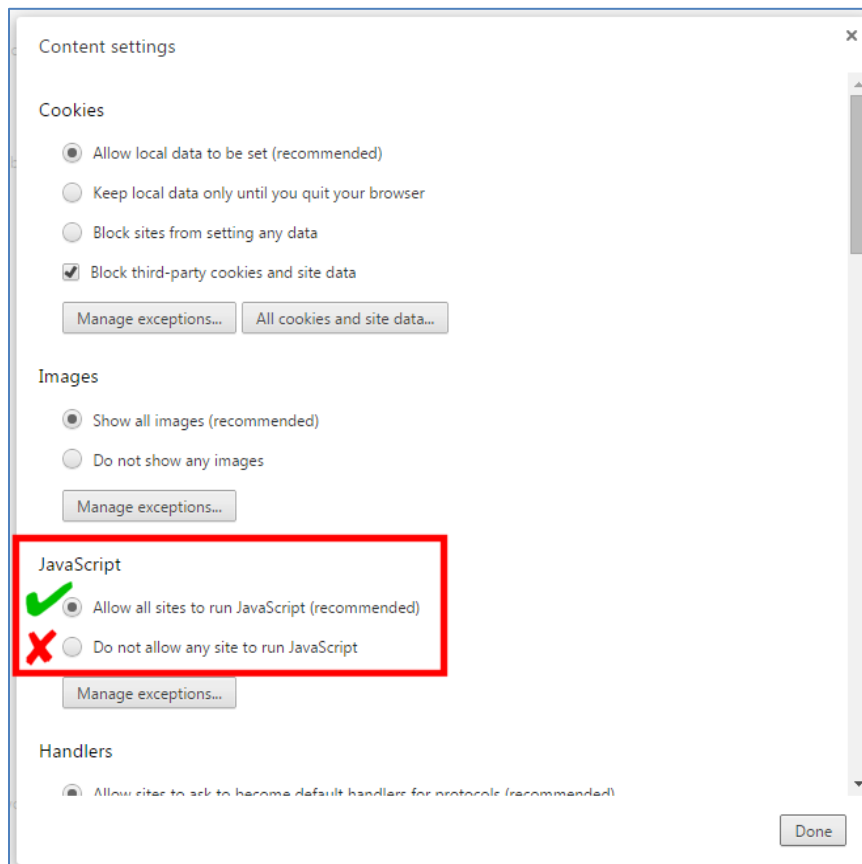


5. Find the 'Privacy' section and click the **Content settings...** button:

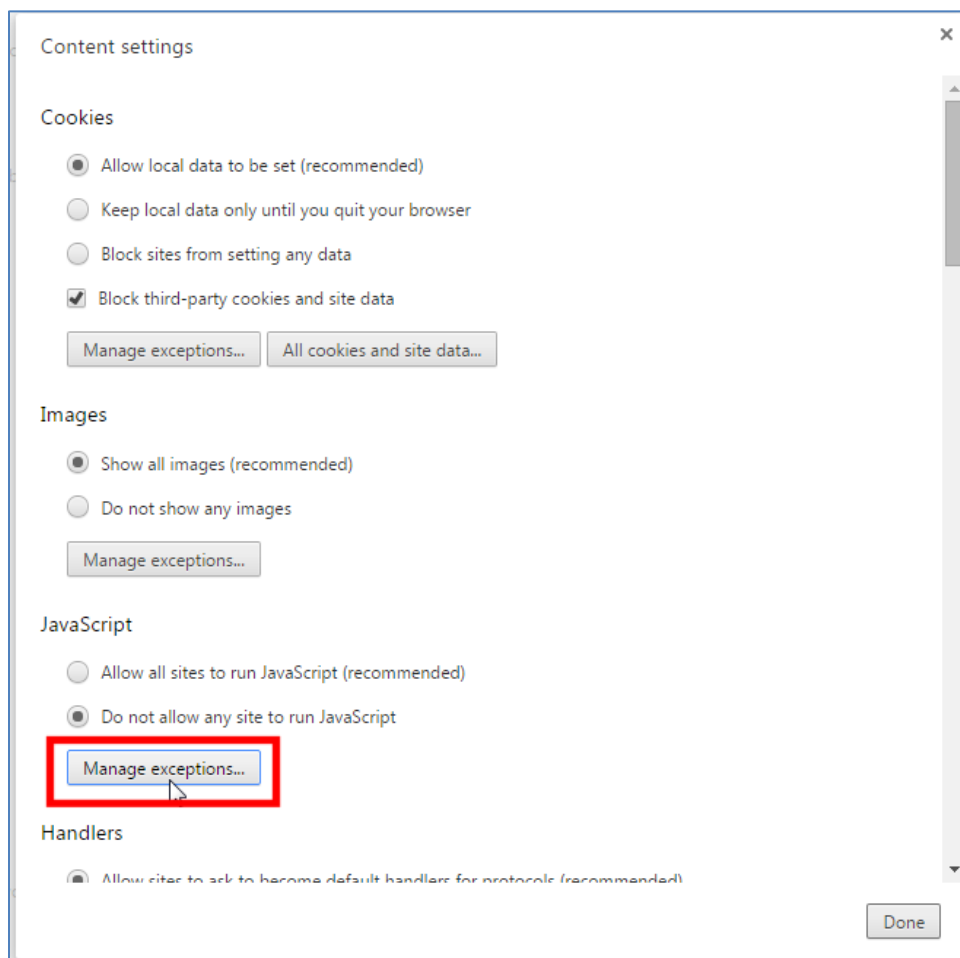


6. On the screen that opens, check the 'JavaScript' setting.

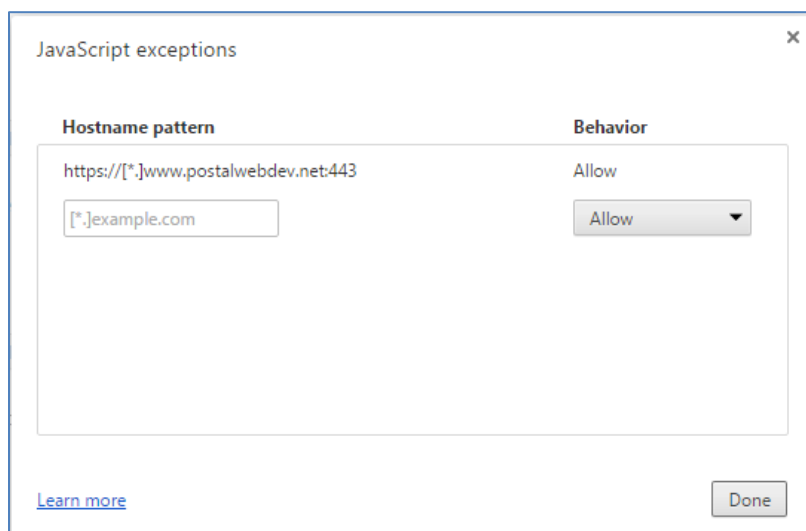
Make sure the 'Do not allow any site to run JavaScript' is not selected. If you must keep the setting at 'Do not allow any site to run JavaScript', then use the **Manage Exceptions** button to add the PostalWeb site:



7. If exceptions for specific, individual sites is desired, leave the option 'Do not allow any site to run JavaScript' selected and click the **Manage Exceptions...** button:



The *JavaScript exceptions* window will open displaying any exceptions already specified. Additional exceptions can also be added which will over-ride the general behaviors selected in the previous screen:



Enter the 'Hostname pattern' (i.e. web page URL) and select 'Allow' from the corresponding drop down list provided.

Click the **Done** button when configuration is complete.



Users should defer to their own company's policies regarding security and browser settings.

APPENDIX 4

User-Defined Report Fields

The following shows the fields of a postage statement that are available for selection when configuring a 'user-defined' report.

Summary Report Type

When the 'summary' report type is selected, an additional section named 'Summary By' displays. The categories and selectable fields found in the 'Summary By' section largely mirror those found in the 'Fields' section. A Summary report will aggregate statements that share a common identifier (field) selected in the 'Summary By' section.



When a field is selected in the 'Summary By' section, certain items in the 'Fields' section will become disabled (set to 'OFF' and ghosted).

The following are the available fields in the 'Summary By' section:

Job Category

Summary By

When grouping is used, only numeric fields that can be totaled will be available for selection

Job	Job Number	<input type="checkbox"/> OFF	Job ID	<input type="checkbox"/> OFF
Mailing Attributes	Job Description	<input type="checkbox"/> OFF	Mail.Dat File Name	<input type="checkbox"/> OFF
Postage Pieces	Customer Ref ID	<input type="checkbox"/> OFF		
USPS Transaction				
Preparer				
MailOwner				
Permit Holders				
Publications				
PW Internal				

Mailing Attributes Category

Summary By

When grouping is used, only numeric fields that can be totaled will be available for selection

Job
Mailing Attributes
Postage Pieces
USPS Transaction
Preparer
MailOwner
Permit Holders
Publications
PW Internal

Political	<input type="checkbox"/> OFF	Election	<input type="checkbox"/> OFF
Post Office City	<input type="checkbox"/> OFF	Post Office State	<input type="checkbox"/> OFF
Post Office Zip	<input type="checkbox"/> OFF	Post Office Zip+4	<input type="checkbox"/> OFF
Form	<input type="checkbox"/> OFF	Processing Category	<input type="checkbox"/> OFF
Profit Indicator	<input type="checkbox"/> OFF	DVD CD Other Disk	<input type="checkbox"/> OFF
Round Trip Only	<input type="checkbox"/> OFF	Hold For Pickup Pieces	<input type="checkbox"/> OFF
Combined Mixed Single Class	<input type="checkbox"/> OFF	Mail Class	<input type="checkbox"/> OFF
Price Category	<input type="checkbox"/> OFF	Edition Code	<input type="checkbox"/> OFF
Issue Date	<input type="checkbox"/> OFF	Issue Freq	<input type="checkbox"/> OFF

Postage Pieces Category

Summary By

When grouping is used, only numeric fields that can be totaled will be available for selection

Job
Mailing Attributes
Postage Pieces
USPS Transaction
Preparer
MailOwner
Permit Holders
Publications
PW Internal

Rate Postage Affixed	<input type="checkbox"/> OFF	Rate Postage Affixed Desc	<input type="checkbox"/> OFF
----------------------	------------------------------	---------------------------	------------------------------

USPS Transaction Category

Summary By

When grouping is used, only numeric fields that can be totaled will be available for selection

Job
Mailing Attributes
Postage Pieces
USPS Transaction
Preparer
MailOwner
Permit Holders
Publications
PW Internal

CAPS Transaction Number	<input type="checkbox"/> OFF	Clerk Initials	<input type="checkbox"/> OFF
Transaction Number	<input type="checkbox"/> OFF	Mailing Group ID	<input type="checkbox"/> OFF
CAPS Account	<input type="checkbox"/> OFF	Payment Date Time	<input type="checkbox"/> OFF
Mailing Mailing Date	<input type="checkbox"/> OFF	Mail Arrival Date Time	<input type="checkbox"/> OFF
Closing Date	<input type="checkbox"/> OFF	PSID	<input type="checkbox"/> OFF

Preparer Category

Summary By

When grouping is used, only numeric fields that can be totaled will be available for selection

Job				
Mailing Attributes	Preparer Name	<input type="checkbox"/> OFF	Preparer CRID	<input type="checkbox"/> OFF
Postage Pieces	Preparer Address 1	<input type="checkbox"/> OFF	Preparer Address 2	<input type="checkbox"/> OFF
USPS Transaction	Preparer City	<input type="checkbox"/> OFF	Preparer Zip	<input type="checkbox"/> OFF
Preparer	Preparer Zip+4	<input type="checkbox"/> OFF	Preparer Contact Name	<input type="checkbox"/> OFF
MailOwner	Preparer Phone	<input type="checkbox"/> OFF	Preparer Location	<input type="checkbox"/> OFF
Permit Holders				
Publications				
PW Internal				

Mail Owner Category

Summary By

When grouping is used, only numeric fields that can be totaled will be available for selection

Job				
Mailing Attributes	Mail Owner CRID	<input type="checkbox"/> OFF	Mail Owner Name	<input type="checkbox"/> OFF
Postage Pieces	Mail Owner Email	<input type="checkbox"/> OFF	Mail Owner Address 1	<input type="checkbox"/> OFF
USPS Transaction	Mail Owner Address 2	<input type="checkbox"/> OFF	Mail Owner City	<input type="checkbox"/> OFF
Preparer	Mail Owner State	<input type="checkbox"/> OFF	Mail Owner Zip	<input type="checkbox"/> OFF
MailOwner	Mail Owner Zip+4	<input type="checkbox"/> OFF	Mail Owner Location	<input type="checkbox"/> OFF
Permit Holders				
Publications				
PW Internal				

Permit Holders Category

Summary By

When grouping is used, only numeric fields that can be totaled will be available for selection

Job				
Mailing Attributes	Permit Number	<input type="checkbox"/> OFF	Permit Holder CRID	<input type="checkbox"/> OFF
Postage Pieces	Permit Holder Name	<input type="checkbox"/> OFF	Permit Holder Address 1	<input type="checkbox"/> OFF
USPS Transaction	Permit Holder Address 2	<input type="checkbox"/> OFF	Permit Holder City	<input type="checkbox"/> OFF
Preparer	Permit Holder State	<input type="checkbox"/> OFF	Permit Holder Zip	<input type="checkbox"/> OFF
MailOwner	Permit Holder Zip+4	<input type="checkbox"/> OFF	Permit Holder Contact	<input type="checkbox"/> OFF
Permit Holders	Permit Holder Contact Phone	<input type="checkbox"/> OFF	Permit Type	<input type="checkbox"/> OFF
Publications	Postage Affixed Permit Number	<input type="checkbox"/> OFF	Postage Affixed Permit Type	<input type="checkbox"/> OFF
PW Internal	Postage Affixed Permit CRID	<input type="checkbox"/> OFF		

Publications Category

Summary By

When grouping is used, only numeric fields that can be totaled will be available for selection

Job	Publication Number	<input type="checkbox"/> OFF	Title	<input type="checkbox"/> OFF
Mailing Attributes	News Owner Address 1	<input type="checkbox"/> OFF	News Owner Address 2	<input type="checkbox"/> OFF
Postage Pieces	News Owner City	<input type="checkbox"/> OFF	News Owner State	<input type="checkbox"/> OFF
USPS Transaction	News Owner Zip	<input type="checkbox"/> OFF	News Owner Zip+4	<input type="checkbox"/> OFF
Preparer	News Owner Name	<input type="checkbox"/> OFF	News Owner Phone	<input type="checkbox"/> OFF
MailOwner				
Permit Holders				
Publications				
PW Internal				

PW Internal Category

Summary By

When grouping is used, only numeric fields that can be totaled will be available for selection

Job	Location	<input type="checkbox"/> OFF	Stage	<input type="checkbox"/> OFF
Mailing Attributes	Data Complete	<input type="checkbox"/> OFF	Message	<input type="checkbox"/> OFF
Postage Pieces	Date Time Created	<input type="checkbox"/> OFF	Job Name	<input type="checkbox"/> OFF
USPS Transaction				
Preparer				
MailOwner				
Permit Holders				
Publications				
PW Internal				

Detail Report Type

Job Category

Fields			
Job			
Mailing Attributes	Job Number	<input type="checkbox"/> OFF	Job ID
Postage Pieces	Job Description	<input type="checkbox"/> OFF	Mail.Dat File Name
USPS Transaction	Customer Ref ID	<input type="checkbox"/> OFF	<input type="checkbox"/> OFF
Preparer			
MailOwner			
Permit Holders			
Publications			
PW Internal			

Mailing Attributes Category

Fields			
Job			
Mailing Attributes	Political	<input type="checkbox"/> OFF	Election
Postage Pieces	Post Office City	<input type="checkbox"/> OFF	Post Office State
USPS Transaction	Post Office Zip	<input type="checkbox"/> OFF	Post Office Zip+4
Preparer	Form	<input type="checkbox"/> OFF	Processing Category
MailOwner	Profit Indicator	<input type="checkbox"/> OFF	Actual Number Containers
Permit Holders	DVD CD Other Disk	<input type="checkbox"/> OFF	Round Trip Only
Publications	Hold For Pickup Pieces	<input type="checkbox"/> OFF	Combined Mixed Single Class
PW Internal	Mail Class	<input type="checkbox"/> OFF	Price Category
	Edition Code	<input type="checkbox"/> OFF	Issue Date
	Issue Freq	<input type="checkbox"/> OFF	Advertising PCT
	In County Supp	<input type="checkbox"/> OFF	Out County Supp
	Ridealong Piece Weight	<input type="checkbox"/> OFF	Piece Weight
			<input type="checkbox"/> OFF

Postage Pieces Category

Fields				
Job Mailing Attributes Postage Pieces USPS Transaction Preparer MailOwner Permit Holders Publications PW Internal	Net Postage Due	<input type="checkbox"/> OFF	Total USPS Adj. Postage	<input type="checkbox"/> OFF
	Postage Affixed Total	<input type="checkbox"/> OFF	Rate Postage Affixed	<input type="checkbox"/> OFF
	Discount Amount	<input type="checkbox"/> OFF	Rate Postage Affixed Desc	<input type="checkbox"/> OFF
	Total Pieces	<input type="checkbox"/> OFF	Total Weight	<input type="checkbox"/> OFF

USPS Transaction Category

Fields				
Job Mailing Attributes Postage Pieces USPS Transaction Preparer MailOwner Permit Holders Publications PW Internal	CAPS Transaction Number	<input type="checkbox"/> OFF	Clerk Initials	<input type="checkbox"/> OFF
	Transaction Number	<input type="checkbox"/> OFF	Mailing Group ID	<input type="checkbox"/> OFF
	Balance Before	<input type="checkbox"/> OFF	Transaction Amount	<input type="checkbox"/> OFF
	CAPS Account	<input type="checkbox"/> OFF	Payment Date Time	<input type="checkbox"/> OFF
	Mailers Mailing Date	<input type="checkbox"/> OFF	Mail Arrival Date Time	<input type="checkbox"/> OFF
	Closing Date	<input type="checkbox"/> OFF	PSID	<input type="checkbox"/> OFF

Preparer Category

Fields				
Job Mailing Attributes Postage Pieces USPS Transaction Preparer MailOwner Permit Holders Publications PW Internal	Preparer Name	<input type="checkbox"/> OFF	Preparer CRID	<input type="checkbox"/> OFF
	Preparer Address 1	<input type="checkbox"/> OFF	Preparer Address 2	<input type="checkbox"/> OFF
	Preparer City	<input type="checkbox"/> OFF	Preparer State	<input type="checkbox"/> OFF
	Preparer Zip	<input type="checkbox"/> OFF	Preparer Zip+4	<input type="checkbox"/> OFF
	Preparer Contact Name	<input type="checkbox"/> OFF	Preparer Phone	<input type="checkbox"/> OFF
	Preparer Location	<input type="checkbox"/> OFF		

Mail Owner Category

Fields				
Job Mailing Attributes Postage Pieces USPS Transaction Preparer MailOwner Permit Holders Publications PW Internal	Mail Owner CRID	<input type="checkbox"/> OFF	Mail Owner Name	<input type="checkbox"/> OFF
	Mail Owner Email	<input type="checkbox"/> OFF	Mail Owner Address 1	<input type="checkbox"/> OFF
	Mail Owner Address 2	<input type="checkbox"/> OFF	Mail Owner City	<input type="checkbox"/> OFF
	Mail Owner State	<input type="checkbox"/> OFF	Mail Owner Zip	<input type="checkbox"/> OFF
	Mail Owner Zip+4	<input type="checkbox"/> OFF	Mail Owner Location	<input type="checkbox"/> OFF

Permit Holders Category

Fields				
Job Mailing Attributes Postage Pieces USPS Transaction Preparer MailOwner Permit Holders Publications PW Internal	Permit Number	<input type="checkbox"/> OFF	Permit Holder CRID	<input type="checkbox"/> OFF
	Permit Holder Name	<input type="checkbox"/> OFF	Permit Holder Address 1	<input type="checkbox"/> OFF
	Permit Holder Address 2	<input type="checkbox"/> OFF	Permit Holder City	<input type="checkbox"/> OFF
	Permit Holder State	<input type="checkbox"/> OFF	Permit Holder Zip	<input type="checkbox"/> OFF
	Permit Holder Zip+4	<input type="checkbox"/> OFF	Permit Holder Contact	<input type="checkbox"/> OFF
	Permit Holder Contact Phone	<input type="checkbox"/> OFF	Permit Type	<input type="checkbox"/> OFF
	Postage Affixed Permit Number	<input type="checkbox"/> OFF	Postage Affixed Permit Type	<input type="checkbox"/> OFF
	Postage Affixed Permit CRID	<input type="checkbox"/> OFF		

Publications Category

Fields				
Job Mailing Attributes Postage Pieces USPS Transaction Preparer MailOwner Permit Holders Publications PW Internal	Publication Number	<input type="checkbox"/> OFF	Title	<input type="checkbox"/> OFF
	News Owner Address 1	<input type="checkbox"/> OFF	News Owner Address 2	<input type="checkbox"/> OFF
	News Owner City	<input type="checkbox"/> OFF	News Owner State	<input type="checkbox"/> OFF
	News Owner Zip	<input type="checkbox"/> OFF	News Owner Zip+4	<input type="checkbox"/> OFF
	News Owner Name	<input type="checkbox"/> OFF	News Owner Phone	<input type="checkbox"/> OFF

PW Internal Category

Fields

Job

Mailing Attributes

Postage Pieces

USPS Transaction

Preparer

MailOwner

Permit Holders

Publications

PW Internal

Location

Data Complete

Date Time Created

Stage

Message

Job Name

☐ OFF

☐ OFF

☐ OFF

☐ OFF

☐ OFF

☐ OFF