



DAT-PreCheck

Installation & User Guide

Version 2, Created April 28, 2020

ABOUT THIS 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
Updated section	Revision	ABOUT THIS GUIDE and page footers throughout document	Updated trademark and copyright information.
Updated section	Revision	REQUIREMENTS FOR INSTALLATION & USE	Added DPC version information and updated existing SQL Server version information.
Updated section	Revision	Throughout document	Replaced mention of MailDrop Engine or MDE with PostalWeb Connector or PWC.
Updated section	Revision	DOWNLOAD AND INSTALL THE UTILITY	Removed mention of 32-bit systems.
Updated section	Revision	AUTO VALIDATION TAB	Added Troubleshooting note about DPC waiting one minute before grabbing or picking up a detected file.
Updated section	Revision	Throughout document	Corrected typos and replaced screen images where necessary.

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BEFORE YOU BEGIN

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 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.



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.

PURPOSE

The purpose of this Guide is to provide installation and operating instructions for DAT-PreCheck™.

INTRODUCTION

Commingle mailers who prepare mail with MLOCRs must provide mail owner MID's or CRID's for many different mail owners. These identifiers are stored in "profiles" used by sorting software products. As the mailer runs the mail for each client on the software they select the profile for that client and the mail owner MID or CRID for that client will appear in the Mail.dat® file for the mail sorted for that client. If the mail being run is non-profit, the mail owner's Non-profit authorization number (NPA) must also be populated into the Mail.dat file for that client. If an NPA is missing or invalid, *PostalOne!*® still processes the Mail.dat file but calculates the postage at the for-profit rate. A warning is provided in the validation log, but this can take a long time to resolve. The mailer must cancel the statement, change or populate the NPA and resubmit. This is time consuming for mailers.

Before You Begin

A large percentage of Full Service jobs that are successfully submitted are not used for USPS® service performance measurement because of by/for conflicts. This is when the mailer provides two identifiers for the same mail pieces that belong to two different entities. A mail owner MID must be linked to the mail owner CRID if both are supplied. By/for conflicts are displayed on the mail owner dashboard and can result in Full Service assessments if they exceed allowed thresholds.

Beyond by/for conflicts and NPA issues, the potential exists for mailers to use the wrong STID for a mailing, which could result in them losing their Full Service discount and/or result in large fees if an incorrect service is requested. Also, using an out of date Labeling List could also result in large fees or penalties if a mailer drop ships their mail to the wrong facility. Also, a labeling list may not be out of date, but there could also be a newer one available that could result in better delivery performance.

In conjunction with PostalWeb®, Window Book's DAT-PreCheck utility creates a list of mail owner identifiers present in a Mail.dat file, along with IMB, STID, and Labeling List information by sending a Mail.dat file BEFORE it goes to production and definitely BEFORE it submitted to *PostalOne!*. This way problems can be easily resolved, which will reduce the time it takes to get Mail.dat files compliant and using the correct MIDs, CRIDs, NPAs, IMBs, STIDs, and Labeling Lists.

DAT-PreCheck submits this information to PostalWeb which runs a check on all of these identifiers and returns a PDF report which shows:

- Which mail owners are being identified for each MPA/CPT combination;
- Whether that combination is for non-profit mail;
 - If non-profit, whether the NPA is present and whether it belongs to the identified mail owner.
- Whether or not the STID class matches the Mail Class (only when PDR or PBC files are included); and
- Labeling List compliance information.

In addition, the report will also show when a Mail Service Provider (MSP) inserts their own MID or CRID in the "By" (i.e. preparer); as well as, in the Mail Owner MID or CRID. This scenario can be valid, but has the potential to be a mistake, as well.

DAT-PreCheck will also warn of by/for conflicts and show mailers what the "primary" mail owner identifier was based on a list of processing priorities.

If an identifier is not in a mailer's PostalWeb database, it will be reported as "unknown", but it will trigger an automated data collection process to add the info to the database by the following day. New clients should only be identified as "unknown" the first day.

Keep in mind that DAT-PreCheck is not only intended for identifying by/for conflicts. Having the proper STIDs and Labeling Lists is paramount for avoiding large assessments and penalties.

DAT-PreCheck supports First Class mail, Standard Class, Periodicals, and Package Services (Bound Printed Matter). It operates independent of any other Window Book software; however, it does require the use of a Client-specific PostalWeb site. Mail.dat(s) can be uploaded manually by the user via the Batch

Validation function in the utility, or the Auto Validation function can be used which automatically uploads files found in a hot folder when the service is running.

DAT-PreCheck saves mailers time and money. It is intended to check Mail.dat files after they have been created by the sorter, but before the files are put into production – and especially before they are uploaded to *PostalOne!*.

REQUIREMENTS FOR INSTALLATION & USE

- The functionality documented in this Guide requires the use of DAT-PreCheck version 8.20.13.73 (or newer);
- Installation and use of DAT-PreCheck requires a computer that has a working Internet connection;
- Installation and use of DAT-PreCheck requires Microsoft® SQL Server® 2016 or higher;
- Clients must have a valid, PostalWeb site (site can be registered during the installation/provisioning process of DAT-PreCheck);
- Clients must be signed up for the EDocs DAT-PreCheck service on their PostalWeb site;
- To receive the e-mail notifications containing the attached reports, PostalWeb user(s) must have the DAT-PreCheck service notification enabled;
- Clients must provide a valid set of *PostalOne!* credentials (i.e. user name and password); and



Window Book strongly recommends the use of a separate set of PostalOne! credentials for use with Window Book products to avoid conflicts and service disruptions that can occur if one set of PostalOne! credentials are being simultaneously for different functions.

- Receipt of the e-mail notification containing the PDF report requires a computer with access to the e-mail account(s) that is signed up to receive the DAT-PreCheck notification from PostalWeb.

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INSTALLATION

DAT-PreCheck consists of two components: the utility itself; and the PostalWeb (PW) service. To install, enable, and use these components requires these three steps:

1. Download and install the software;
2. Provision the software; and
3. Enable the DAT-PreCheck service for specific users in PW.

DOWNLOAD AND INSTALL THE UTILITY

To download and install DAT-PreCheck, perform the following:

1. From the computer or server DAT-PreCheck is to be run on, navigate to the Window Book software downloads page (<http://www.windowbook.com/Support/Downloads>) and then click on the DAT-PreCheck product tile;

Current Product Versions

DAT-MAIL MS-SQL™ Version: 21.20.12.19 Updated: 03/03/2020	Postal Package Partner MSSQL™ Version: 11.19.09.02 Updated: 01/08/2020	DAT-MAIL Prep™ Version: 8.20.14.174 Updated: 03/03/2020	PostalWeb Desktop Dashboard™ Version: 10.20.20.213 Updated: 03/03/2020	PostalWeb Connector™ Version: 8.20.20.223 Updated: 03/10/2020
DAT-PreCheck™ Version: 8.20.13.71 Updated: 03/03/2020	Window Book Automation Scheduler™ Version: 8.20.3.147 Updated: 03/03/2020	TagMaster™ Version: 10.19.02.01 Updated: 11/21/2019	DropShipIT™ Version: 10.03.03.02 Updated: 11/21/2019	Postal Business Companion™ Version: 20.20.03.01 Updated: 02/14/2020
Complete Postal Library Version: 8.20.03.01	Destination Database Update	AWAM File Manager Version: 8.20.13.07	Enterprise Shipper Version: 1.00.5.00	TrueAddress Version: 1.0.0.1

2. The DAT-PreCheck download page will display. Scroll down and click on the **Download DAT-PreCheck** button;

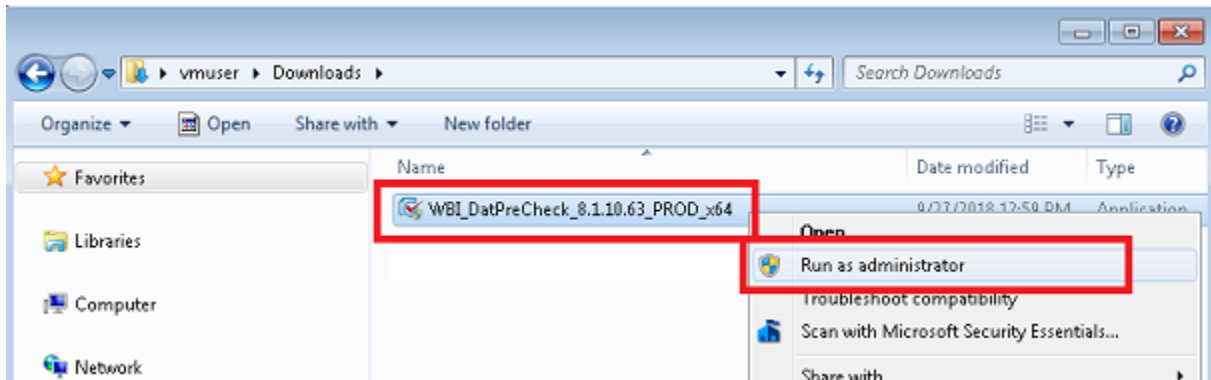
DAT-PreCheck™

[Download DAT-PreCheck™ \(64-bit\)](#)

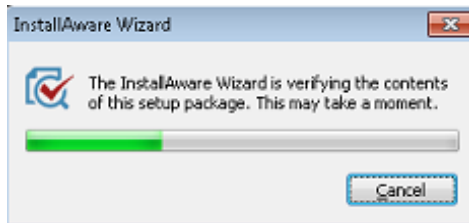
[How do I check whether my computer is 32-bit or 64-bit?](#)

Installation

- Navigate to the installation file (in the example being used here, the file is located in the computer's 'Downloads' folder). Right click on the "WBI_DAT-PreCheck..." installation file and select 'Run as administrator';



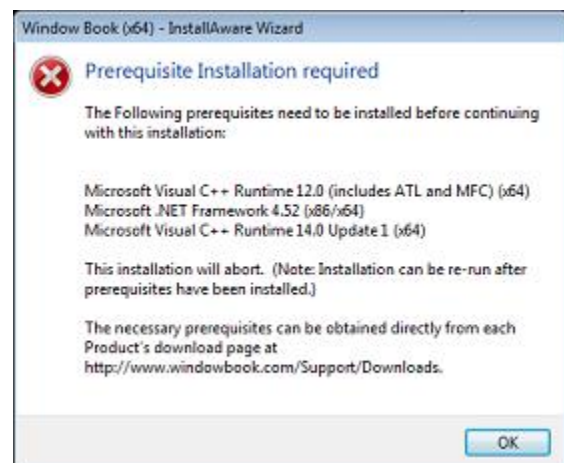
- If a User Account Control dialog displays, click the **Yes** button to close the dialog and continue;
- The contents of the setup package will go through a verification process;



- If no other Window Book products exist on a Client's server or computer, or the version(s) of Window Book software that is installed does not meet the necessary prerequisite requirements for running DAT-PreCheck, a *Prerequisite Installation required* dialog will display informing the user what prerequisites are needed;

i *The information displayed in the Prerequisite dialog is specific to the computer the DAT-PreCheck software is being installed on; therefore, the information contained in the dialog may differ than what is displayed in the image below.*

Make note of the necessary requirements for installing and running DAT-PreCheck. Click the **OK** button to close the dialog. The installation will abort;



- Open a web browser on the computer or server where DAT-PreCheck is to be installed, and navigate to: <http://www.windowbook.com/Support/Downloads>;
- The *Software Downloads* page will display. Click on DAT-PreCheck™;

Current Product Versions				
DAT-MAIL MS-SQL™ Version: 21.20.12.19 Updated: 03/03/2020	Postal Package Partner MSSQL™ Version: 11.19.09.02 Updated: 01/08/2020	DAT-MAIL Prep™ Version: 8.20.14.174 Updated: 03/03/2020	PostalWeb Desktop Dashboard™ Version: 10.20.20.213 Updated: 03/03/2020	PostalWeb Connector™ Version: 8.20.20.223 Updated: 03/10/2020
DAT-PreCheck™ Version: 8.20.13.71 Updated: 03/03/2020	Window Book Automation Scheduler™ Version: 8.20.3.147 Updated: 03/03/2020	TagMaster™ Version: 10.19.02.01 Updated: 11/21/2019	DropShipIT™ Version: 10.03.03.02 Updated: 11/21/2019	Postal Business Companion™ Version: 20.20.03.01 Updated: 02/14/2020
Complete Postal Library Version: 20.20.03.01	Destination Database Update	AWAM File Manager Version: 8.20.13.07	Enterprise Shipper Version: 10.05.03.02	TrueAddress Version: 11.03.01

- The *DAT-PreCheck™ Software Update* page will display. Using the links provided, download and install the necessary prerequisites that were called out in the Prerequisites dialog discussed in [step 6](#) above;

DAT-PreCheck™ Software Update 8.20.13.71

DAT-PreCheck displays and validates the Mailer Identification numbers (MIDs) and Customer Registration Identification numbers (CRIDs) of the Mail Owners and Mail Service Providers identified in a Mail.dat® file. Additionally, DAT-PreCheck validates the Nonprofit Authorization Numbers (NPAs) for any mailing claiming nonprofit pricing. It also provides information outlining the Service Type Identifiers (STIDs) populated in the Mail.dat file. The newest addition to this great validation tool is the ability to validate the Labeling List file dates that were used during the presort process.

The beauty of all this is that it can be done very quickly – allowing you to save valuable time and money. And the best part is that you get the ability to validate this information **before** you submit Mail.dat files to PostalOne!®.

[Learn More about DAT-PreCheck](#)


Requirements:

- Server OS: Windows Server 2016 (64-bit only), Windows 10 Pro (64-bit only)
- Microsoft .NET Framework version 4.52
- C++ 2013 Runtimes (install both 32-bit and 64-bit versions for 64-bit systems)
 - C++ 2013 Runtimes 32-bit Download (x86)
 - C++ 2013 Runtimes 64-bit Download (x64)
- C++ 2015 Runtimes Update 1 (install both 32-bit and 64-bit versions for 64-bit systems)
 - C++ 2015 Runtimes Update 1 32-bit Download (x86)
 - C++ 2015 Runtimes Update 1 64-bit Download (x64)
- Microsoft SQL Server 2012 Native Client (64-bit version)
- Microsoft SQL Server Management Studio 2018 (SSMS)

*Note: Do NOT uninstall any existing SQL Server Native Client software.

NOTE: For the most complete and up-to-date requirement information, refer to the ["Window Book Product Requirements Guide."](#)

 **When installing software, right click on the downloaded file and select 'Run as administrator'.**

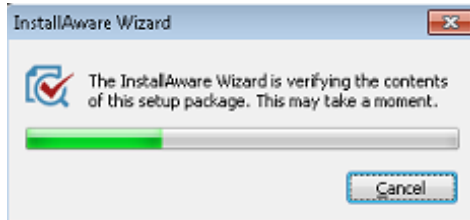
 **Microsoft SQL Server 2016 (and newer) does not automatically install SQL Server Management Studio (SSMS). If installing DAT-PreCheck on a computer or server where no other Window Book products are installed (i.e. SQL Server and SSMS is not already installed), a download link for**

Installation

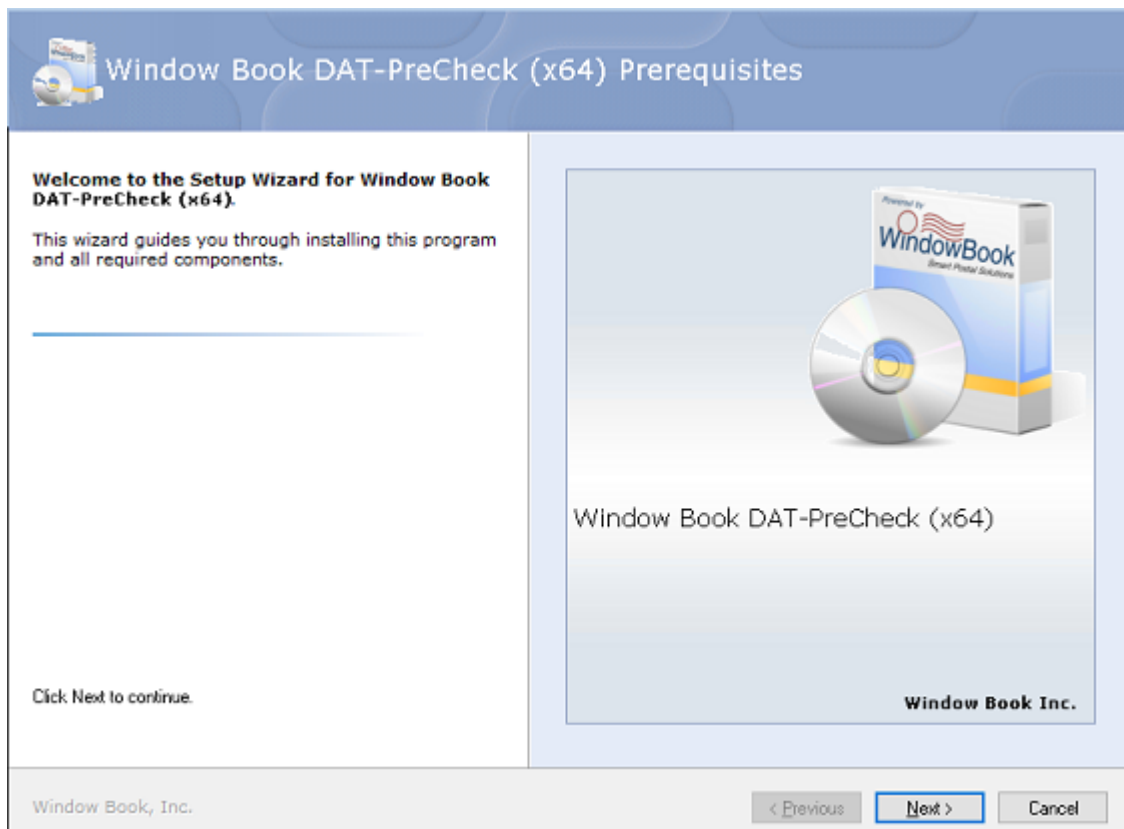
SSMS is also provided on the DAT-PreCheck downloads page. If necessary, SSMS should be installed after the DAT-PreCheck Installation is complete.

 For information on Window Book product requirements (including SQL Server), refer to http://help.windowbook.com/help/WindowBook_Product_Requirements/Static/welcome.htm.

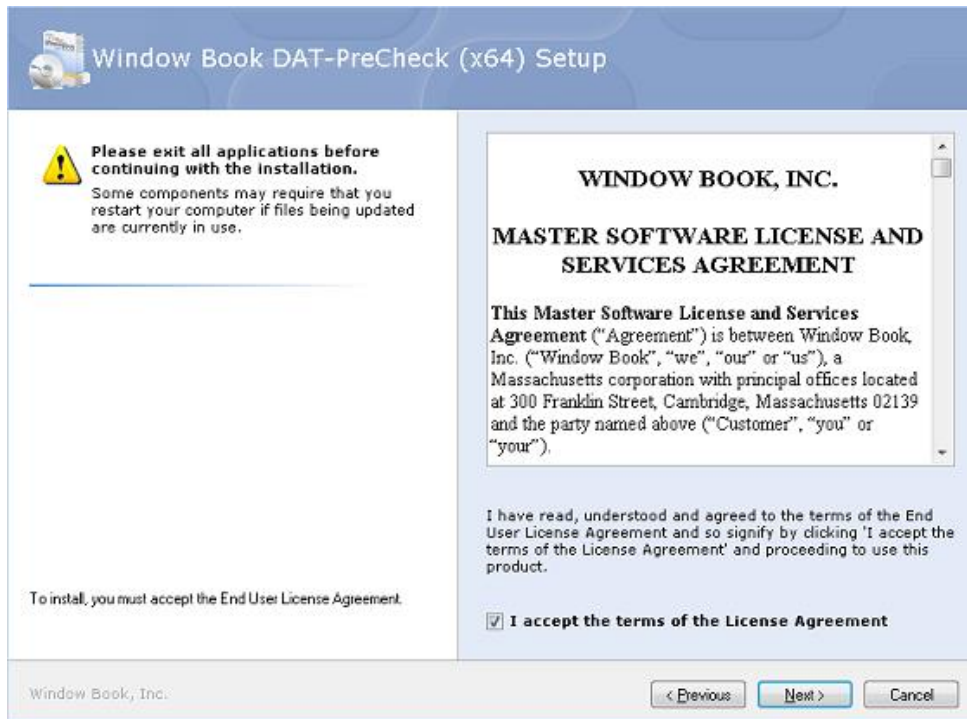
10. Once all of the necessary prerequisites have been installed, launch the DAT-PreCheck installer again. The contents of the setup package will be verified;



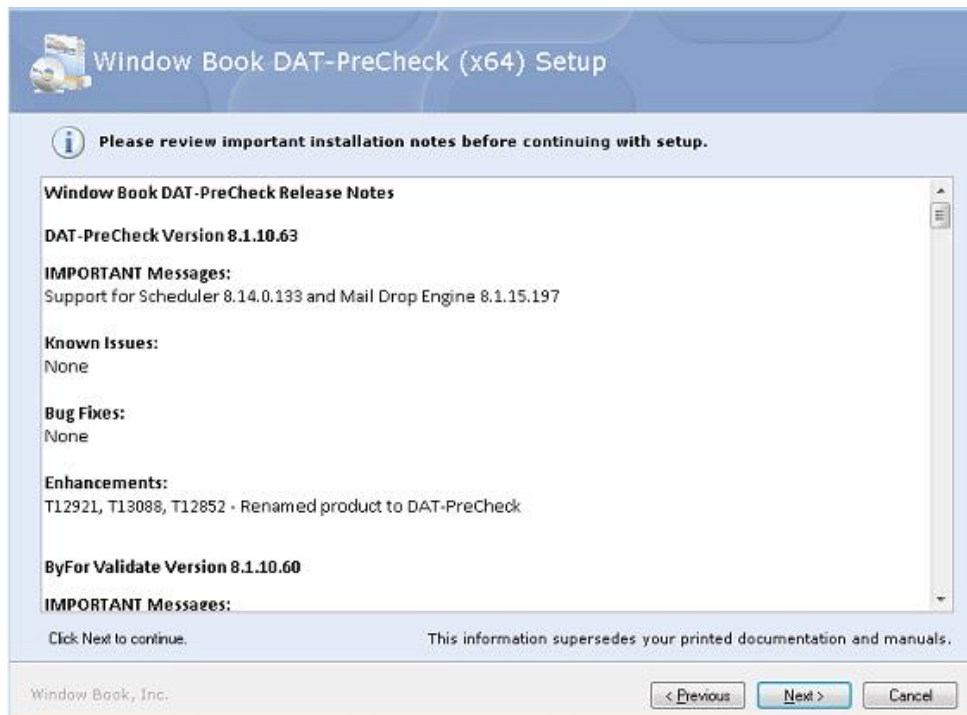
11. After it completes, the installation wizard's Welcome screen will display. Click the **Next** button to continue;



12. The software license and terms agreement screen will display. Exit any open applications and select (check) the box to accept the terms of the License Agreement. Click the **Next** button to continue;



13. The screen containing installation information and release notes will display. Review the information provided and click the **Next** button to continue;



Installation

14. If DAT-PreCheck is being installed on a server or computer where DAT-MAIL is already installed, proceed to step 16 in this procedure. Otherwise, proceed to step 14.

15. The *Microsoft® SQL Server® Options* screen will display.

If necessary, select the option “I need to install SQL Server Express on this machine”. Click the **Next** button to continue. Proceed to [step 16](#) in this procedure.

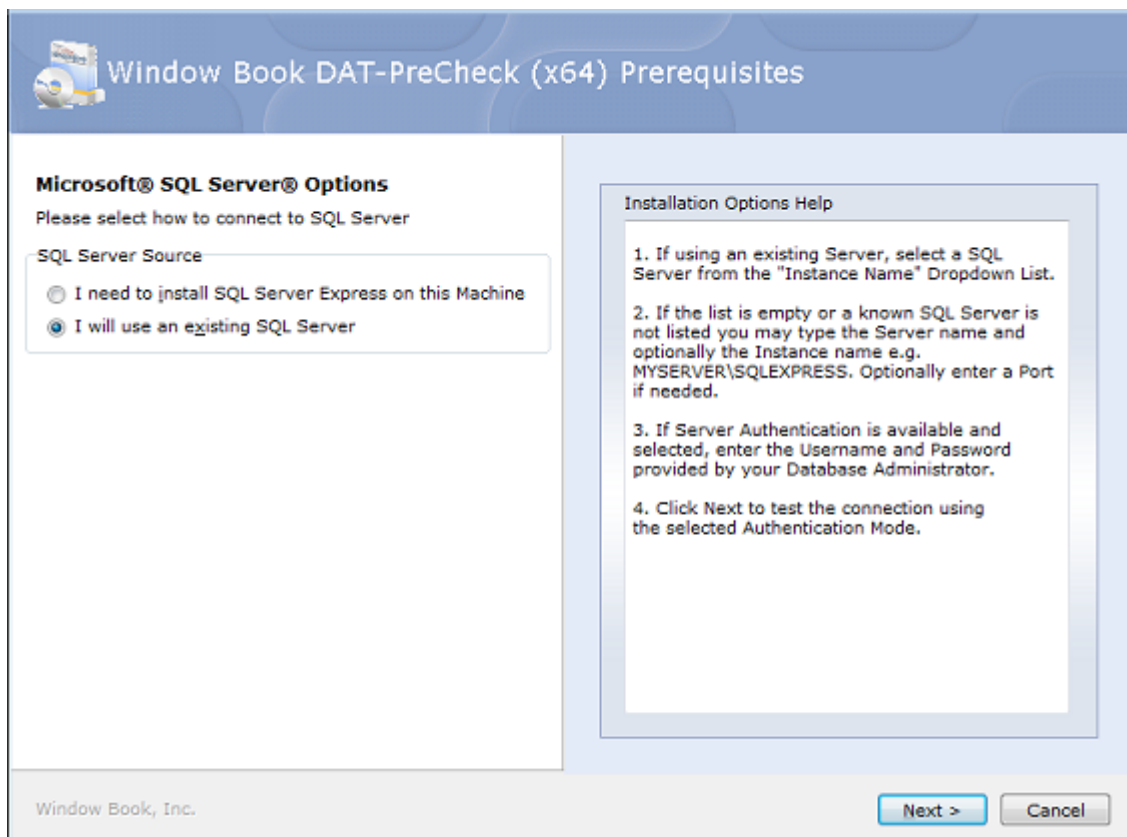


DAT-PreCheck should use the same SQL instance that Window Book’s DAT-MAIL, PPP, PostalWeb Connector, or Automation Scheduler use. If none of these products are currently installed, then Clients will have to either install MS SQL Server (2016 or newer) or use an existing non-Window Book-related instance of SQL (2016 or newer).

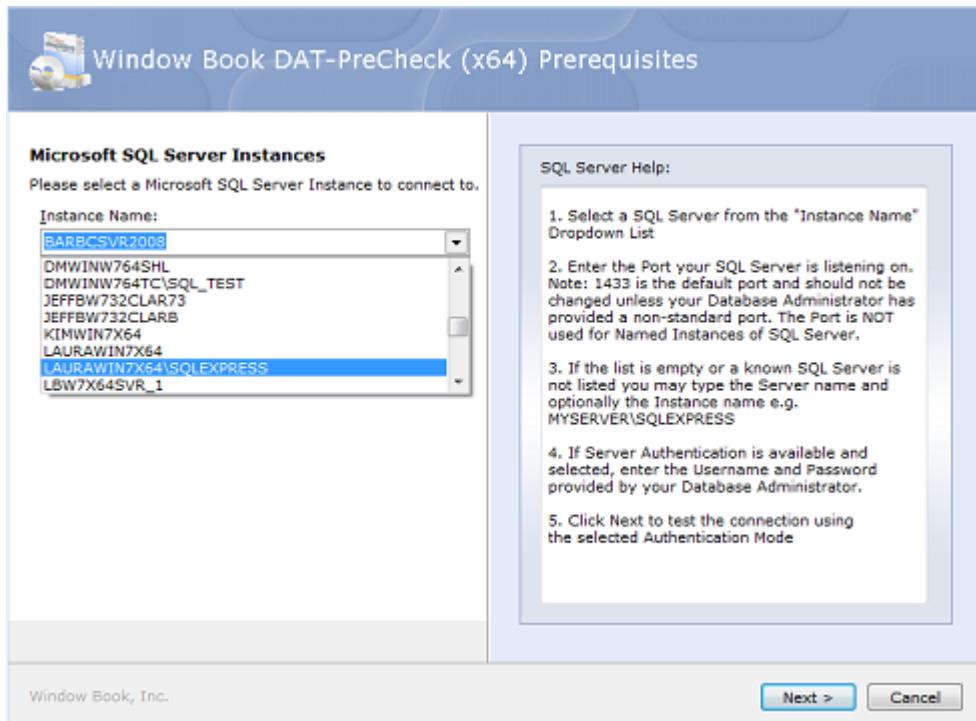


For information on Window Book product requirements (including SQL Server), refer to http://help.windowbook.com/help/WindowBook_Product_Requirements/Static/welcome.htm.

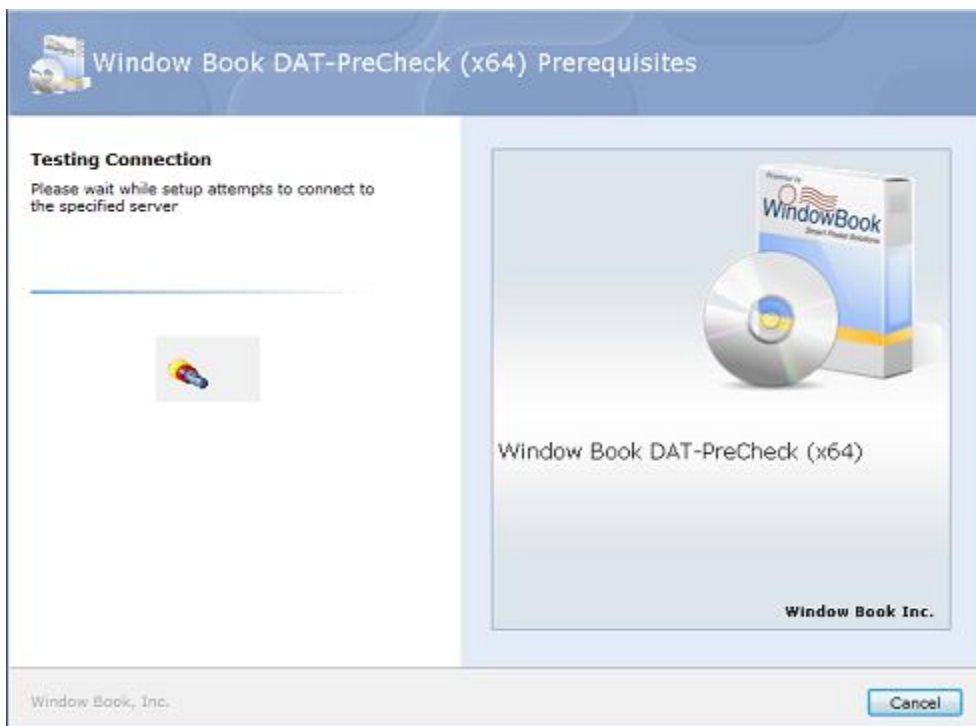
To use an existing instance of SQL Server, select the option “I will use an existing SQL Server” as is being used in the example shown here. Click the **Next** button to continue;



16. The *Microsoft SQL Server Instances* screen will display. Select the instance to be used from the drop-down list provided and follow the additional instructions provided on the screen. Click the **Next** button to continue;



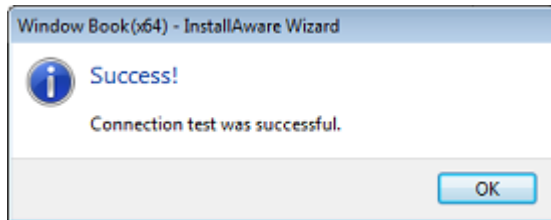
17. The *Testing Connection* screen will display.



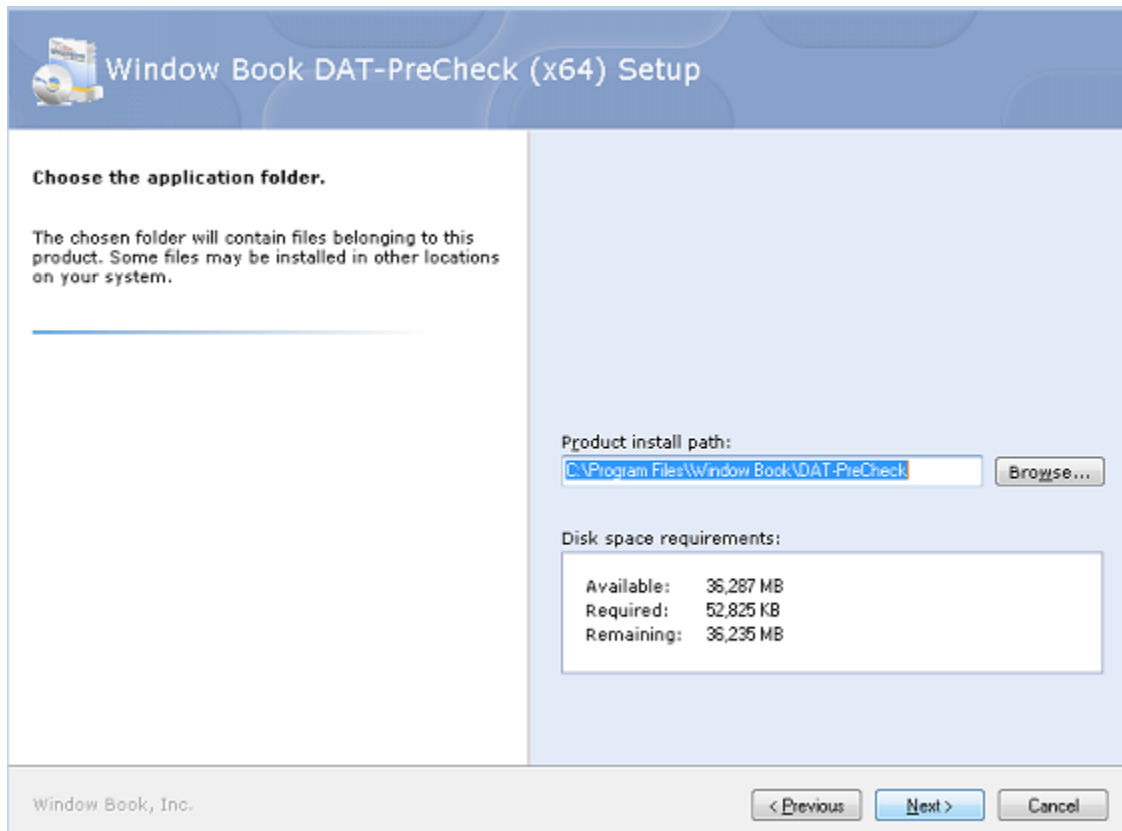
Installation

If a connection cannot be established, a dialog will display informing the user, and prompting them to retry or cancel the installation.

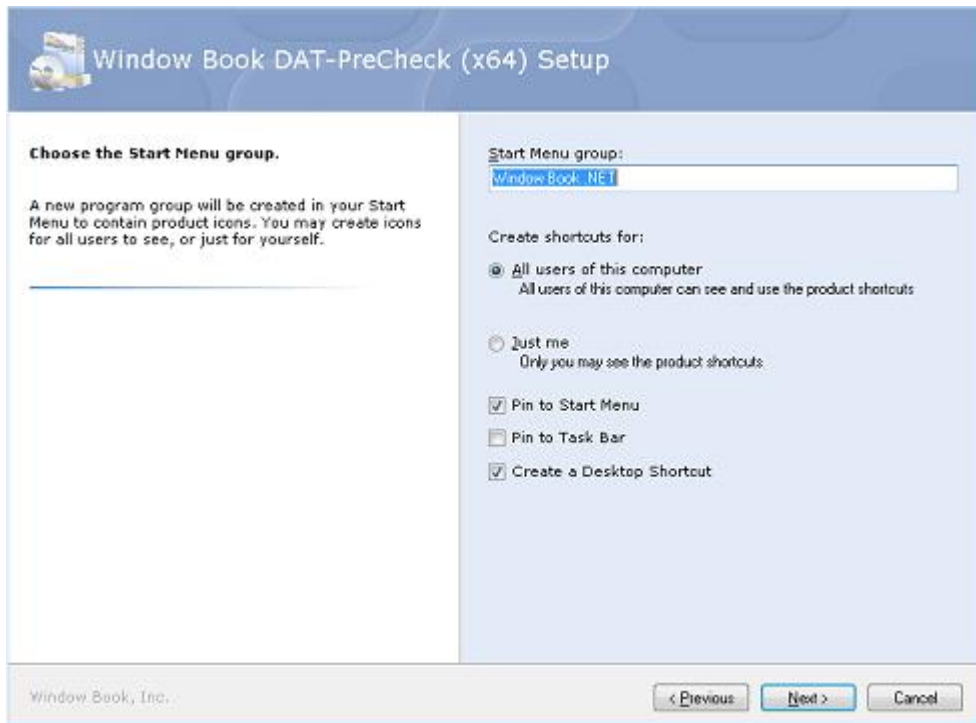
When a connection is established, a confirmation dialog will display. Click the **OK** button to close the dialog and continue;



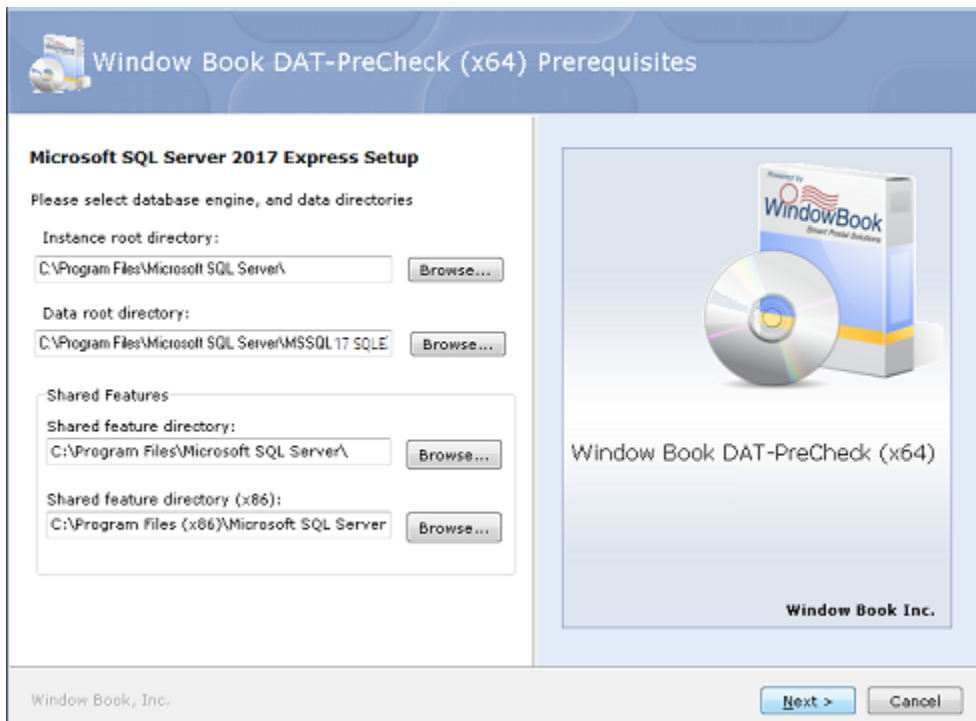
18. The next screen displays the product install path for the utility. This path can be changed by clicking the **Browse...** button; however, Window Book strongly recommends using the default provided. Click the **Next** button to continue;



19. The next screen displays the Start Menu group that will be used for product icons. Enable the desired settings (e.g. create a Desktop shortcut) and click the **Next** button to continue;

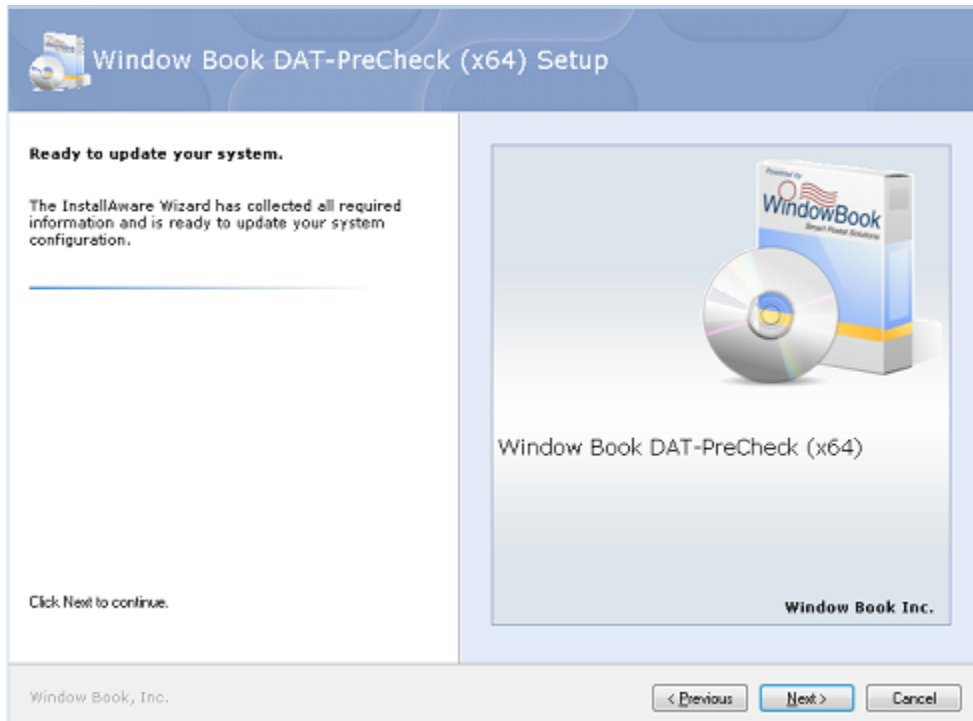


20. If the option “I need to install SQL Server Express on this machine” was selected (refer to [step 15](#) in this procedure), the *Microsoft SQL Server Setup* screen will display. Window Book strongly recommends using the default paths and folders provided. Click the **Next** button to continue;

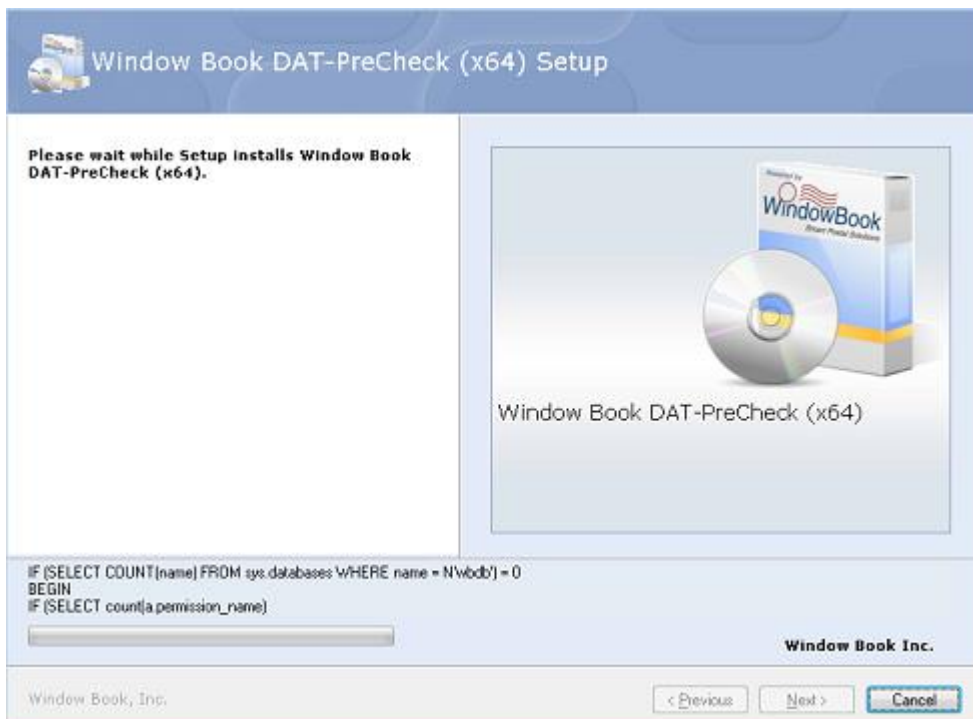


Installation

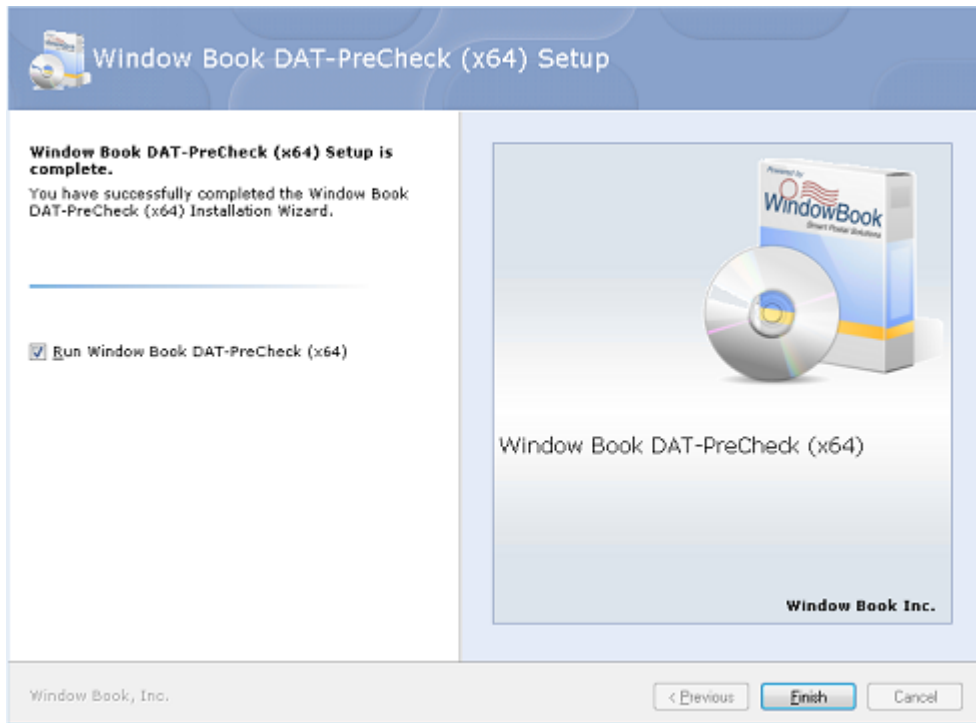
21. The *Ready to update your system* screen will display. Click the **Next** button to begin the installation of the software;



22. The next screen provides a status of the installation procedure and displays until the software installation is complete. If Microsoft SQL Server is being installed along with the software, the installation will take several minutes;



23. When the installation of DAT-PreCheck is complete, the final installation wizard screen will display. With the option to “Run Window Book DAT-PreCheck” selected (checked), click the **Finish** button to close/exit the wizard;



24. Be patient. After a few moments, the utility will automatically launch, and the *PostalWeb Provisioning* screen will automatically display.



If the software is being installed on a system where a Client's PostalWeb site is already provisioned (e.g. provisioned in PostalWeb Connector™), the "PostalWeb Provisioning" screen will not display the first time DAT-PreCheck launches. Instead, the "Auto Validation" screen will display.

The installation is complete. Proceed to [PROVISION THE UTILITY](#) to continue (if software is not already provisioned).

PROVISION THE UTILITY

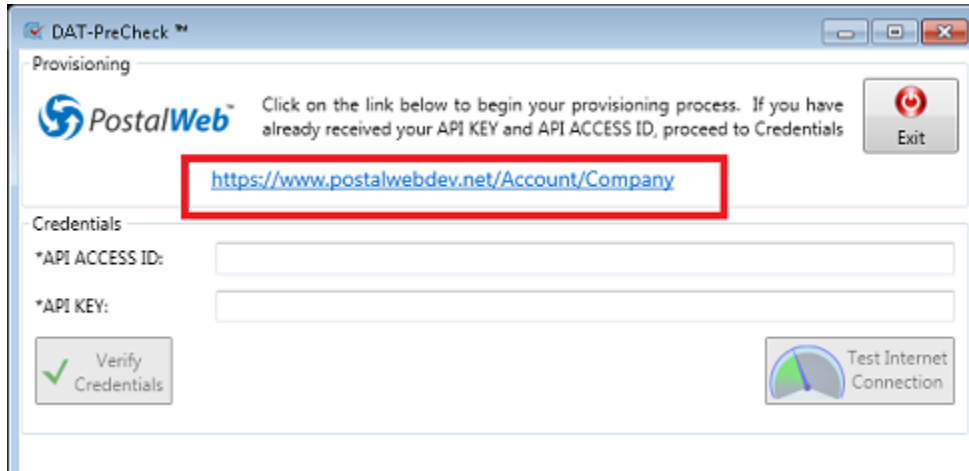
After the installation wizard for DAT-PreCheck completes, the utility automatically launched after a few seconds. If provisioning is required, the *PostalWeb Provisioning* screen automatically displays. If a Client is running PostalWeb Connector (PWC) and has already provisioned their PW site in PWC, the provisioning will automatically carry over to DAT-PreCheck and no further action will be required. In this instance, the *Auto Validation* screen will display instead of the *PostalWeb Provisioning* screen.



To establish communication between the utility, a Client's PW site, and PostalOne!, DAT-PreCheck must be provisioned.

Installation

- i** *This Guide assumes that a Client already has a registered PostalWeb site. If a Client does not yet have a registered PostalWeb site, click the link provided in the “Provisioning” screen to begin the site registration process. Instructions for registering a PostalWeb site are provided in the [PostalWeb® for Mail Service Providers - Setup Guide](#).*



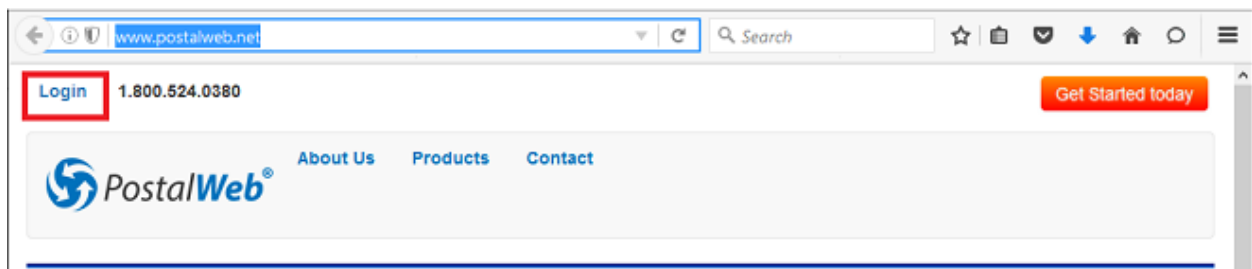
A Client’s PW API Access ID and API Key are required to complete the provisioning process, along with a set of valid *PostalOne!* (P1) login credentials. The necessary API information can be obtained from the Client’s PW site.

- i** *Window Book strongly recommends the use of a separate set of *PostalOne!* credentials for use with Window Book products to avoid conflicts and service disruptions that can occur if one set of *PostalOne!* credentials are being simultaneously for different functions.*

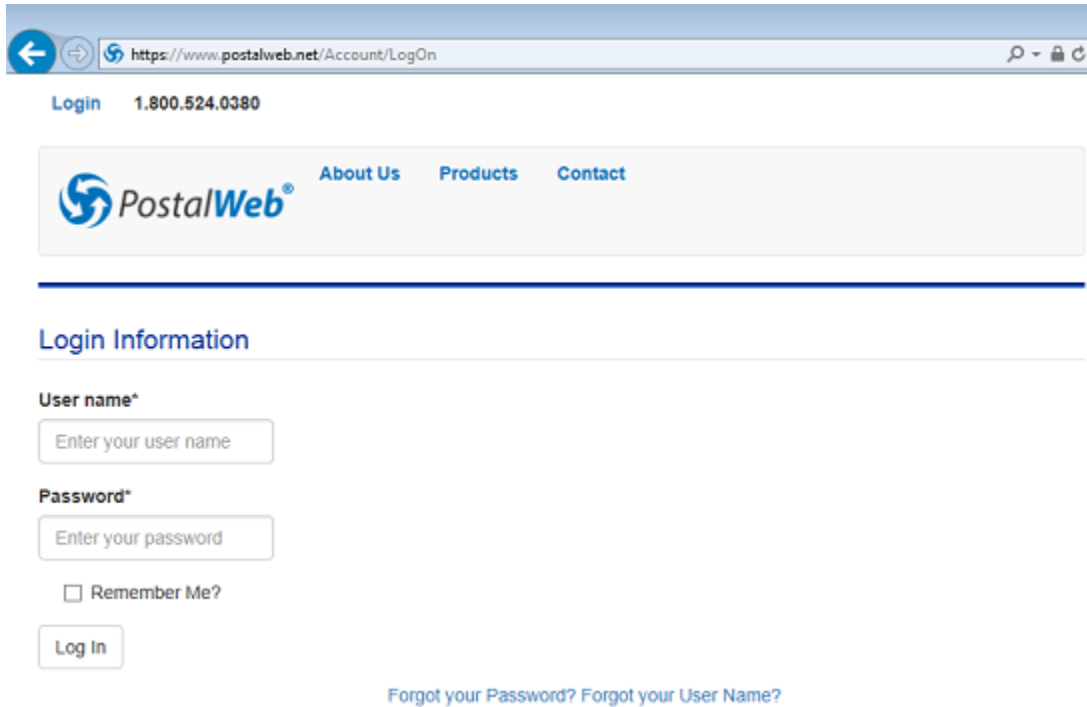
- i** *To obtain the necessary API information from a PW site requires a user with site Administrator privileges.*

To obtain the necessary API information and provision a PostalWeb site in DAT-PreCheck, perform the following:

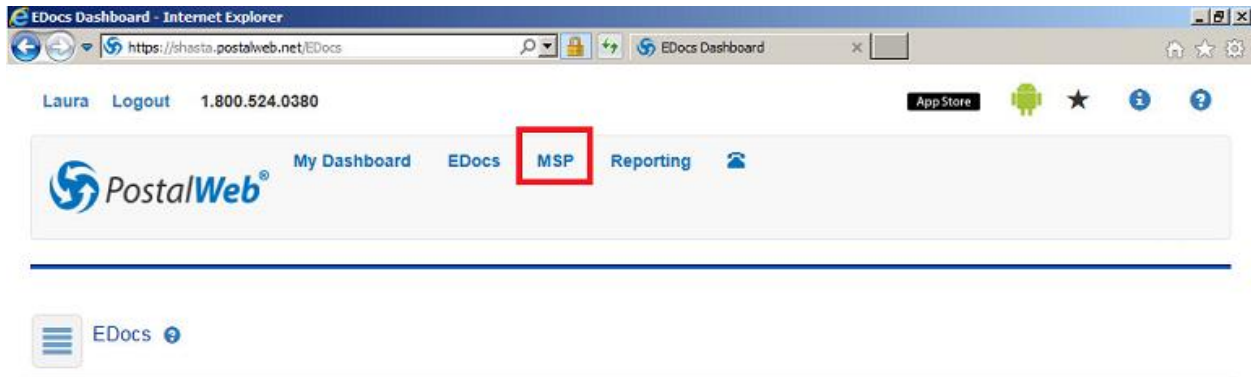
1. With the DAT-PreCheck *Provisioning* screen open, launch a web browser and navigate to: <http://www.postalweb.net/>. Click the ‘Login’ link;



- The PostalWeb *Login Information* screen will display. Enter the appropriate 'User name' and 'Password'. Click the **Log In** button;



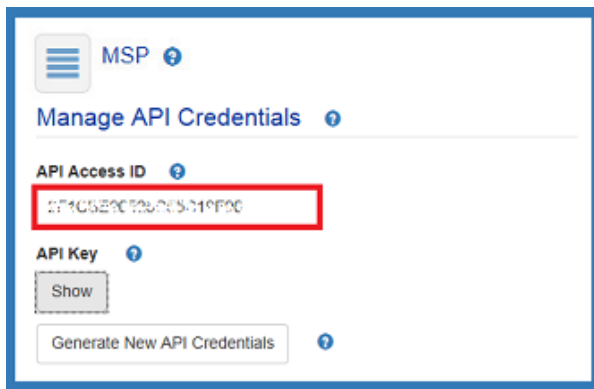
- The *EDocs* page will display. From the main menu bar, click the 'MSP' link;



i *If the Client is a Mail Owner, instead of an "MSP" link, the site's page will display a "Company" link. Mail Owners should click the "Company" link.*

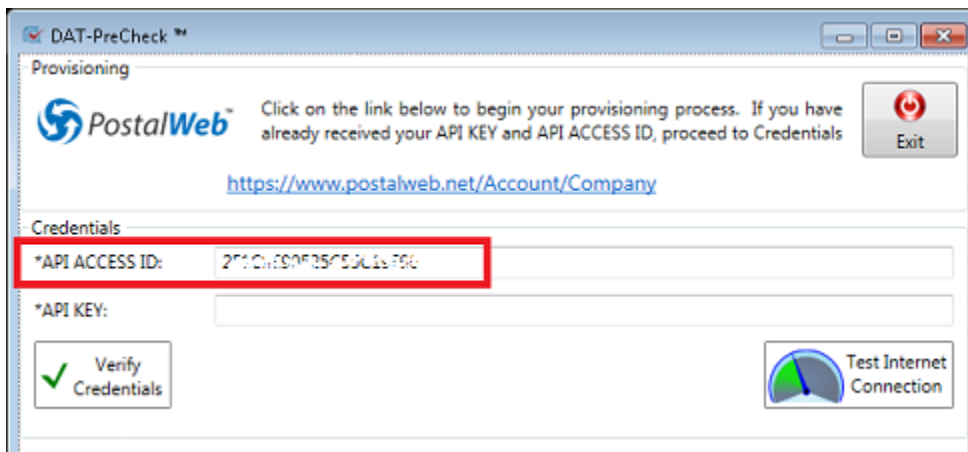
Installation

4. The main *MSP* page will display (“Company” page for Mail Owners). Click the menu icon located next to the “MSP” header and click on the ‘API Credentials’ menu option;

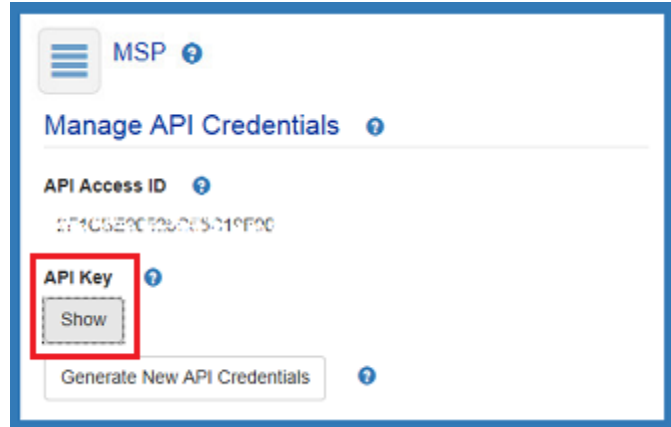


5. The *Manage API Credentials* screen will display. Highlight and copy the API Access ID;

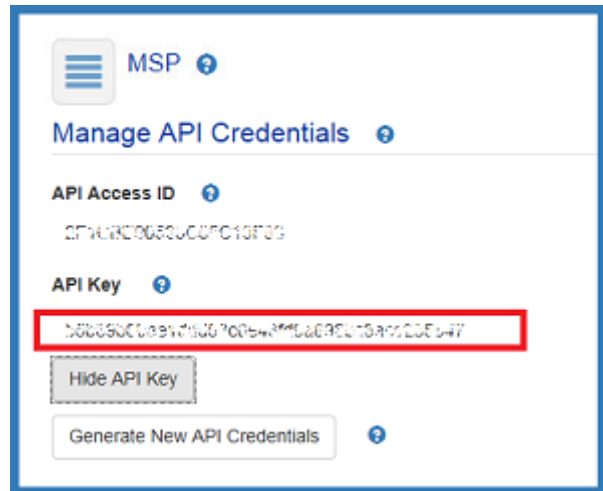
6. In the DAT-PreCheck *Provisioning* screen, place the cursor in the ‘API ACCESS ID’ field and paste the ID copied from the PW site;



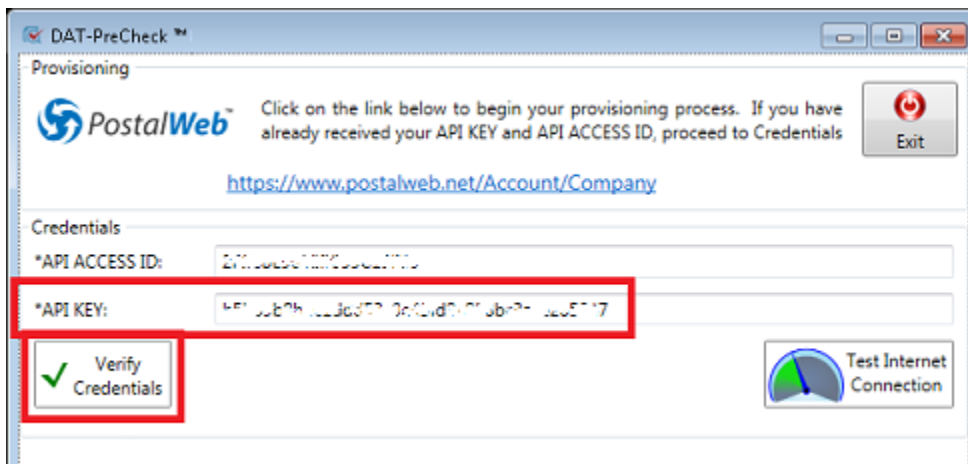
7. In the PW *Manage API Credentials* screen, click the **Show** button to view the API Key;



8. Highlight the API Key and copy it;

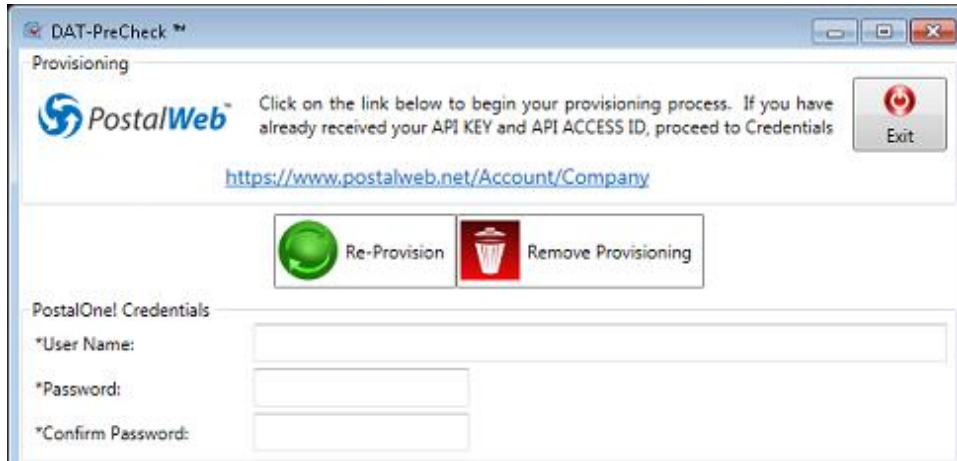


9. In the DAT-PreCheck *Provisioning* screen, place the cursor in the 'API KEY' field and paste the key copied from the PW site. When done, tab or click out of the 'API KEY' field and click the **Verify Credentials** button (the button will become enabled when the cursor is moved out of the 'API Key' field);

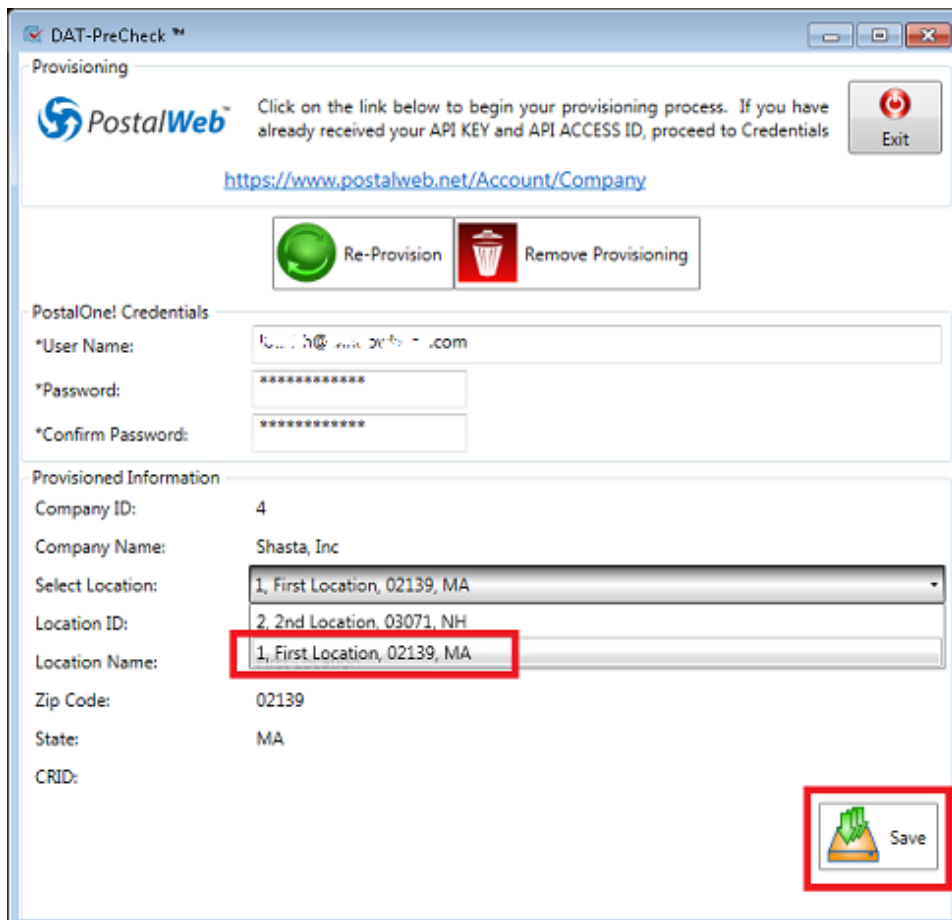


Installation

10. If the API information entered are invalid, a message will display to notify the user. When the API information is accepted, the Provisioning screen will update and fields for entering PostalOne! credentials will display. Enter the P1 credentials (i.e. 'User Name', 'Password', 'Confirm Password');



11. If more than one location exists for the PW site, select the appropriate PW site location from the drop-down list provided. In the example being used here, the "First Location" is selected. Click the **Save** button;



12. DAT-PreCheck's *Auto Validation* screen will display.



Provisioning is complete. Proceed to [ENABLE THE SERVICE](#) to continue.

ENABLE THE SERVICE

The DAT-PreCheck service must be turned on or enabled in PostalWeb (PW) to enable the capability to send/receive the service's e-mail notifications. These e-mail notifications include a PDF report which is generated by PW after it runs a check of the data in the Mail.dat file sent by the utility, against the data located in the PW database. If the service is not enabled, the e-mail notifications with the necessary reports will not be sent.

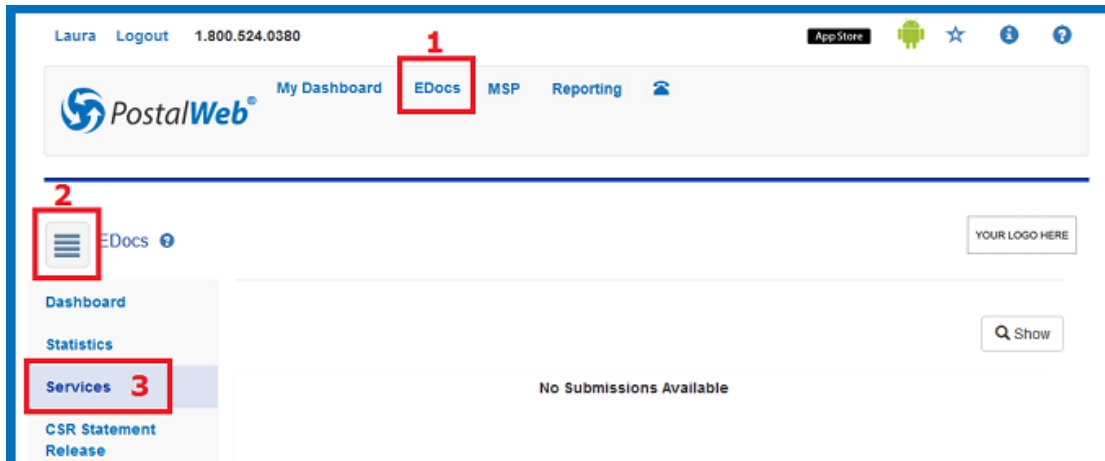
 **Enabling the DAT-PreCheck service requires a PostalWeb user with Administrator privileges.**

Once the service is enabled within PW, an administrator can then selectively enable delivery of the e-mail notifications with attached reports to individuals within their company (refer to [Authorizing Users](#) for more information).

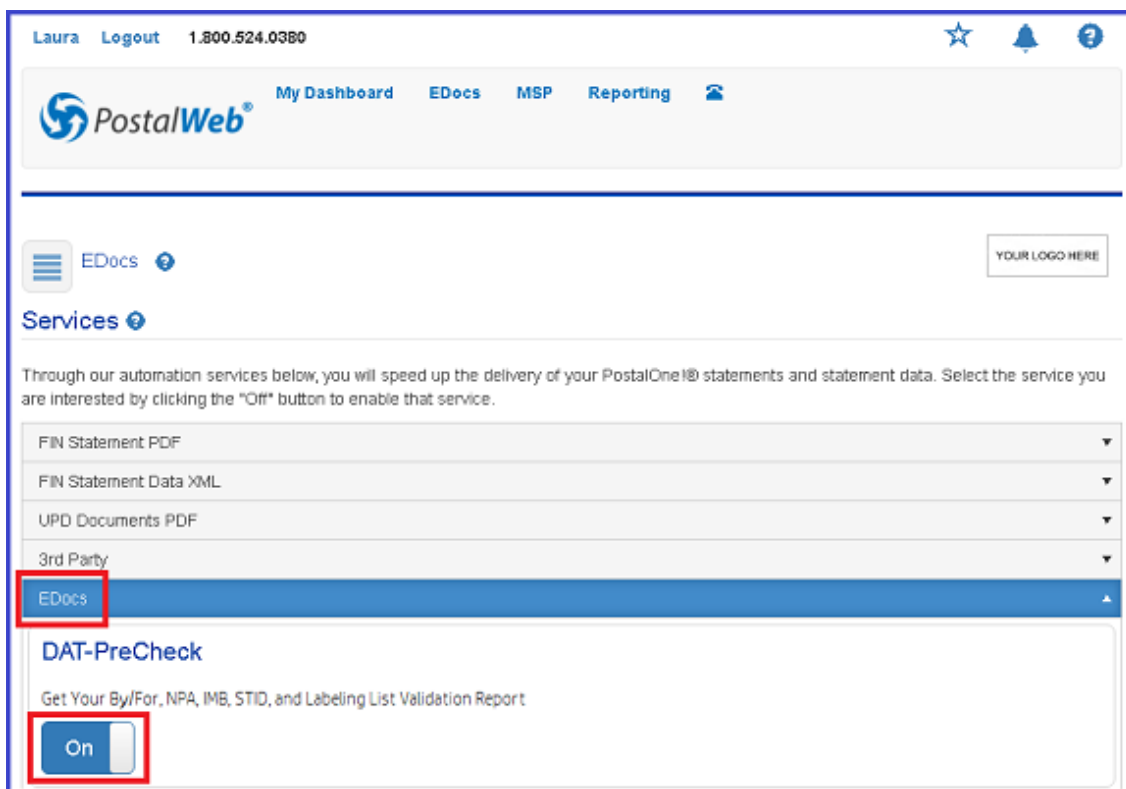
Installation

To enable or turn on the DAT-PreCheck service, the Client should log into their PW site (if not still logged in after copying the API information) and perform the following:

1. From the main menu bar, click the 'EDocs' menu option;
2. The *EDocs* screen will display. Click on the menu icon located at the left of the 'EDocs' header;
3. The *EDocs* menu will display. Click on the 'Services' menu option;



4. The *Services* screen will display. Click the 'EDocs' option to expand it. The 'EDOCS DAT-PreCheck' service will display and will contain an **ON/OFF** button. If the button reads "OFF", the service is not enabled. Click the **OFF** button to enable or turn "ON" the service;



- The service is now enabled for use. At this point, an administrator can selectively enable delivery of the DAT-PreCheck e-mail notifications with attached reports to individual users (refer to [Authorizing Users](#) for more information).



To assist with insuring the successful receipt of e-mail notifications from PostalWeb, follow the guidelines outlined on our “White List Help” web page: <http://www.windowbook.com/Home/White-List-Help>.

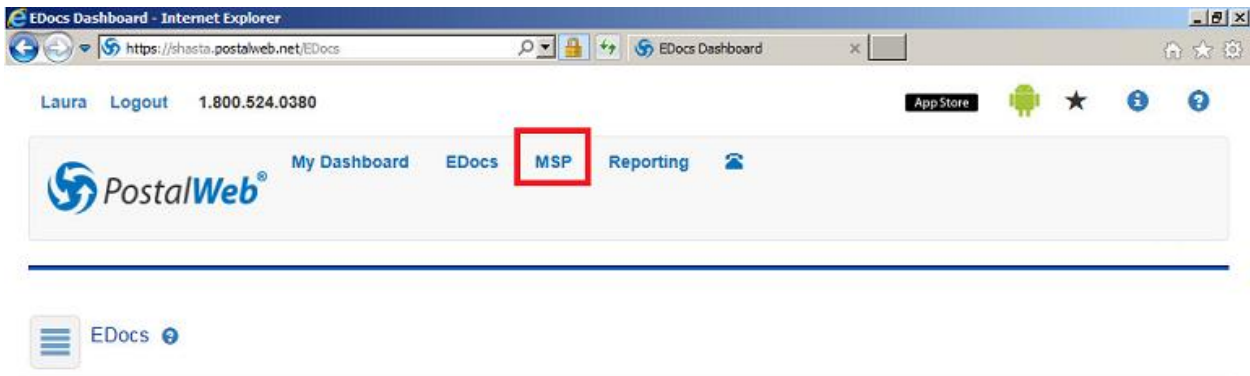
Authorizing Users



Activating the DAT-PreCheck service notifications for individual users requires a PostalWeb user with Administrator privileges.

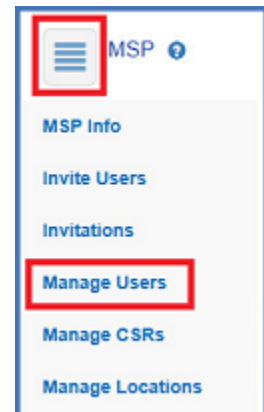
To authorize or enable users to receive the DAT-PreCheck e-mail notifications (i.e. reports), perform the following within PostalWeb (PW):

- From the main menu bar, click the ‘MSP’ menu option;



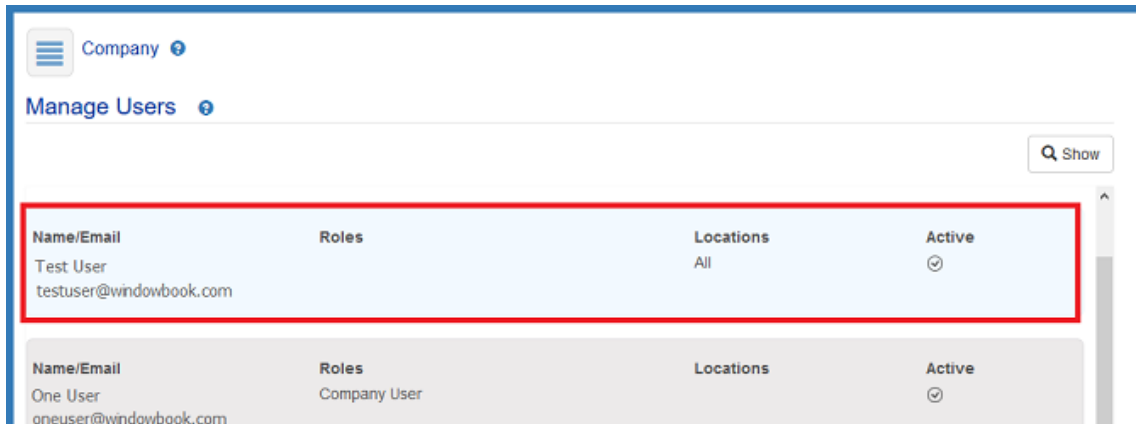
If the Client is a Mail Owner, instead of an “MSP” link, the site’s page will display a “Company” link. Mail Owners should click the “Company” link.

- The MSP screen will display (“Company” screen for Mail Owners). Click on the menu icon located at the left of the ‘MSP’ header, and click on the ‘Manage Users’ menu option;

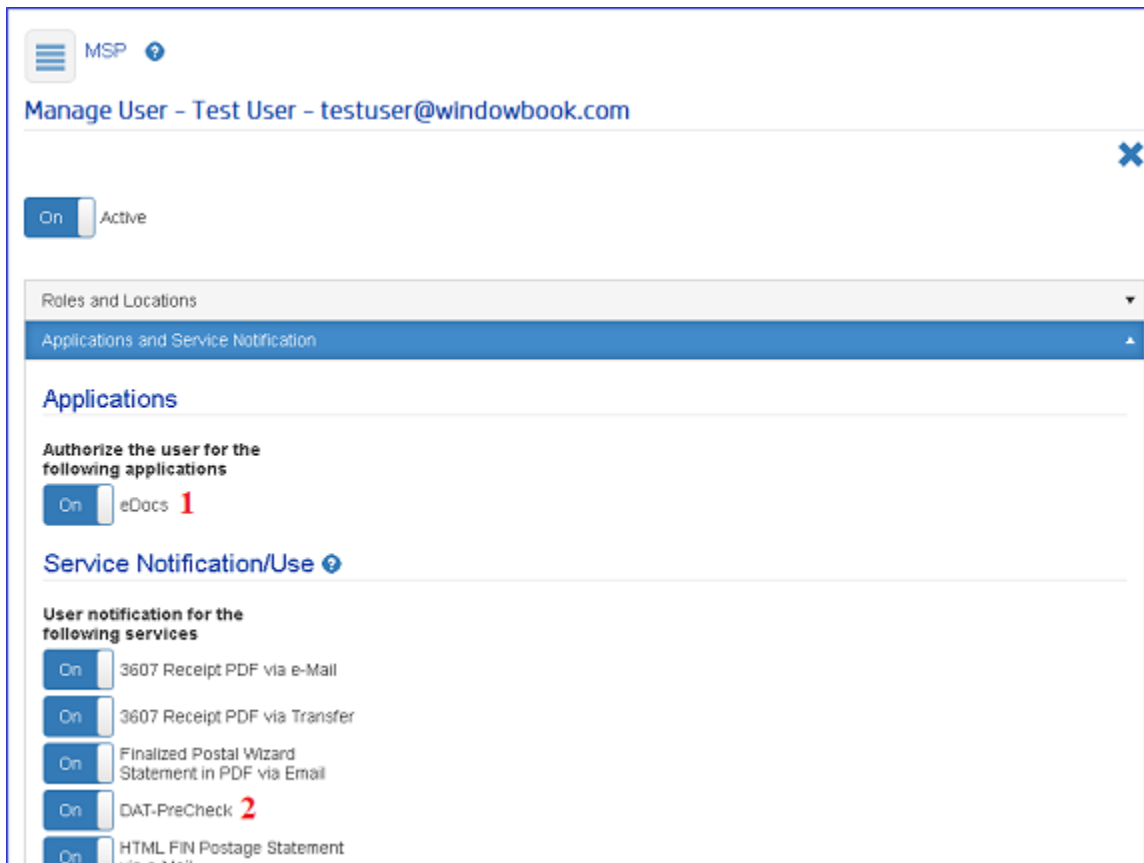


Installation

- The *Manage Users* screen will display. From the list of active users, single click on a user’s line item to view the details for that particular user. In the example being used here, Test User is selected;



- The details page for the selected user (e.g. ‘Test User’) will display. Enable the authorization for the eDocs application (1) and the DAT-PreCheck Service Notification (2) – (i.e. switches should read “ON”);



E-mail notifications/reports are sent to all authorized users, regardless of who the user was that generated the initial request from the utility.

COMPONENT DESCRIPTION & USE

DAT-PreCheck is a simple, easy to use application. It is separated into three tabs: The 'Auto Validation' tab; the 'Batch Validation' tab; and the 'PostalWeb Provisioning' tab.



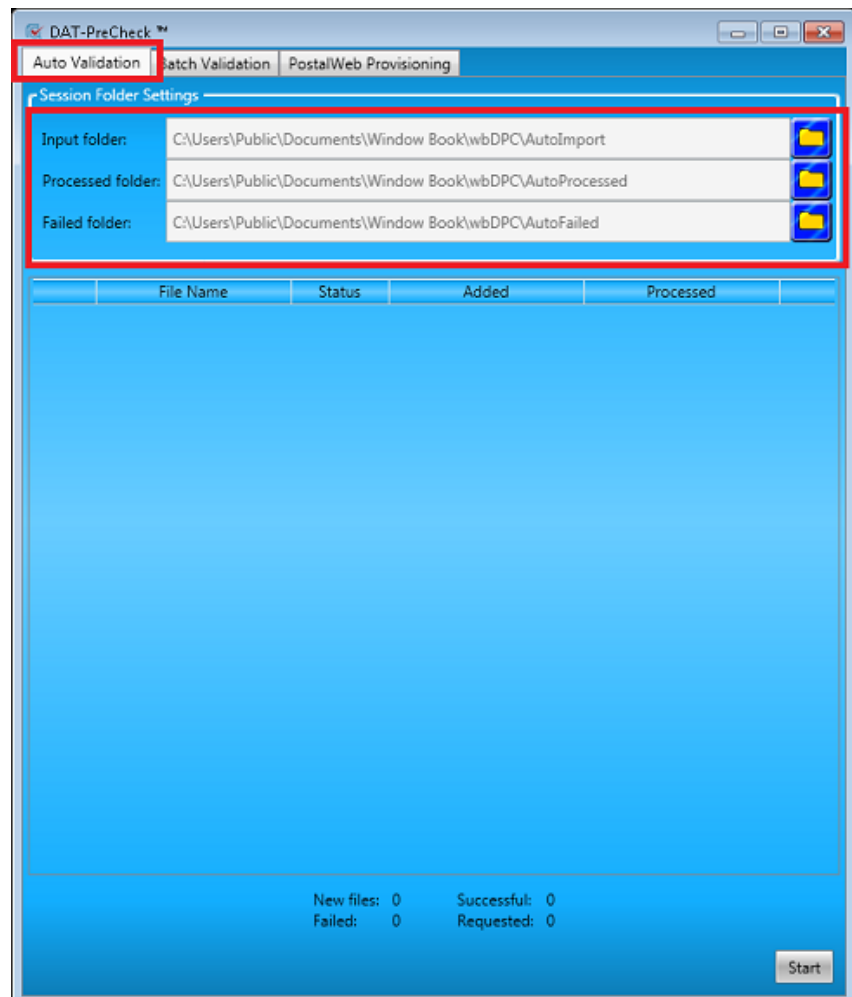
AUTO VALIDATION TAB

'Auto Validation' is a function of DAT-PreCheck that allows mailers to set up a hot folder where DAT-PreCheck will automatically search for Mail.dat files to upload as long as the service is running. The Mailer controls the service (i.e. starts and stops it) within the 'Auto Validation' tab. DAT-PreCheck must be launched/running for the service to run.

DAT-PreCheck has three default folders the mailer can use with the Auto Validation function:


- 'AutoImport' (where the utility searches for Mail.dat files to upload/process);
- 'AutoProcessed' (where the utility places the Mail.dat files after they have been uploaded and processed); and
- 'AutoFailed' (where the utility places files that failed to upload/process).

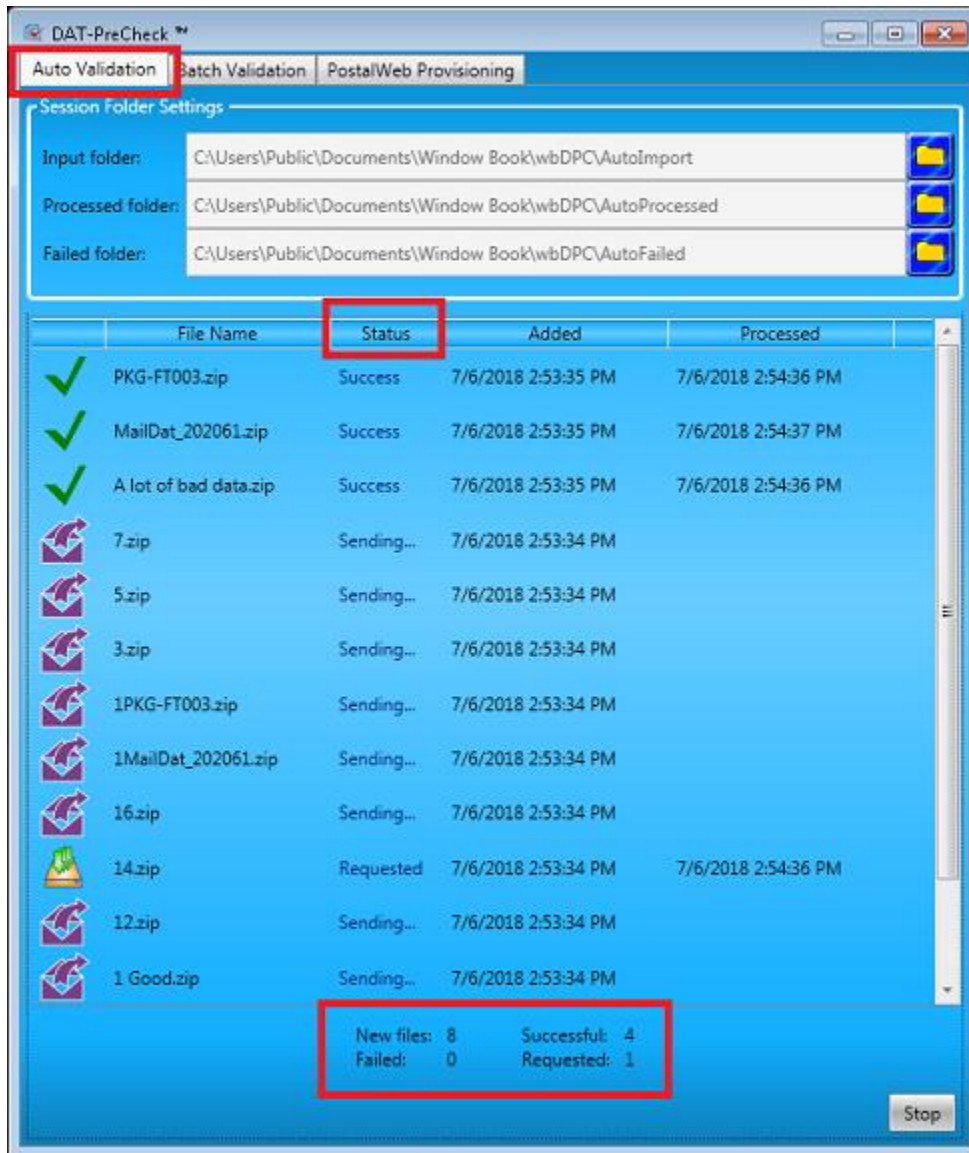
The location and names of these folders can be changed by the mailer if desired by clicking the corresponding folder icon.



Component Description & Use

When the service is started, Mail.dat files found in the AutoImport folder will display in the job grid on the screen, along with their processing status.

 **DPC will wait one minute after a new file is identified before it will attempt to grab it from the 'AutoImport' folder. If after the one minute the file still cannot be grabbed by DPC (the file is still locked or in use by another program such as presort), DPC will try up to 10 times to grab it (for up to two hour and 45 minutes).**



As the files begin to upload/process, file statistics are provided at the bottom of the Auto Validation window. Statistic information is not saved. Statistics will be reset to zero '0' whenever the utility is closed/shut down.

Files will be removed from the job grid approximately 30 seconds after a Success or Requested status is reached.

E-mail notifications for each processed job are sent containing the DAT-PreCheck report attached as a PDF. E-mails/reports are sent to all users of a Client's PW site that have the DAT-PreCheck e-mail notification service enabled or turned on. Refer to [Authorizing Users](#) for more information. Information about the DAT-PreCheck report that gets generated for processed jobs can be found under [DAT-PRECHECK REPORT](#) in this Guide.

BATCH VALIDATION TAB

The 'Batch By/For Validation' tab is where Mail.dat files are listed, selected, and sent to PostalWeb (PW) manually by the user.



A main folder is specified where Mail.dat files are stored. When the folder is selected, the Mail.dat files found in that folder are listed on the screen. From there, the user can select files from the list and send them to PW. Single files can be sent, or multiple files can be selected and sent. Once Mail.dat files are sent to PW, the user can have those files moved to a different folder, i.e. a 'Target Folder', that they select, if they wish. This helps them to easily identify the files that were sent to PW.

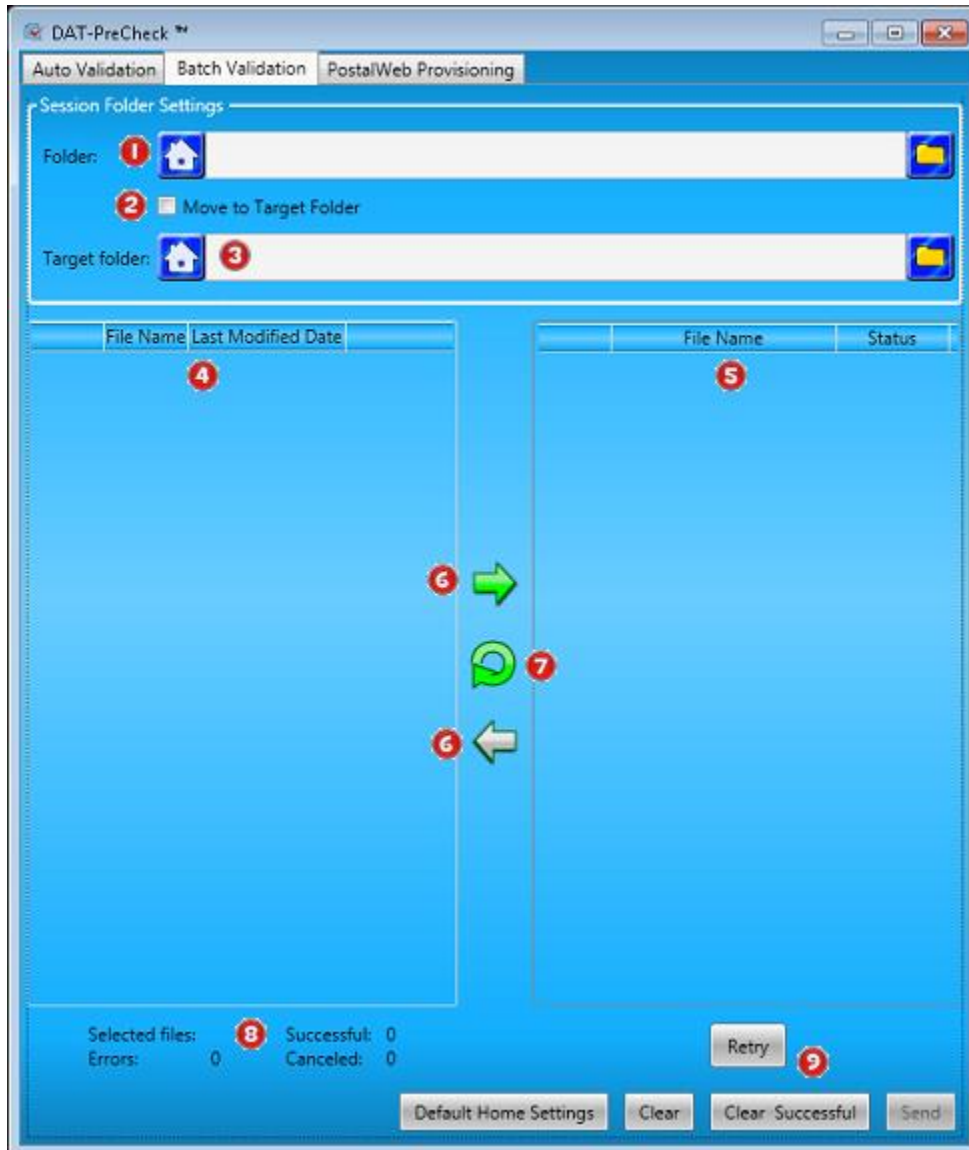
By default, the utility does not remember folders selected for use from one session to another. The user will have to select a folder(s) every time the utility is launched unless actual default folders are set. Even if default folders are set, the user can specify different folder(s) to use for a particular session, depending on their operational needs.





The term "session" is used throughout this document and refers to an instance of DAT-PreCheck being open/launched. Exiting or closing down the utility closes or exits the session.


Component Description & Use

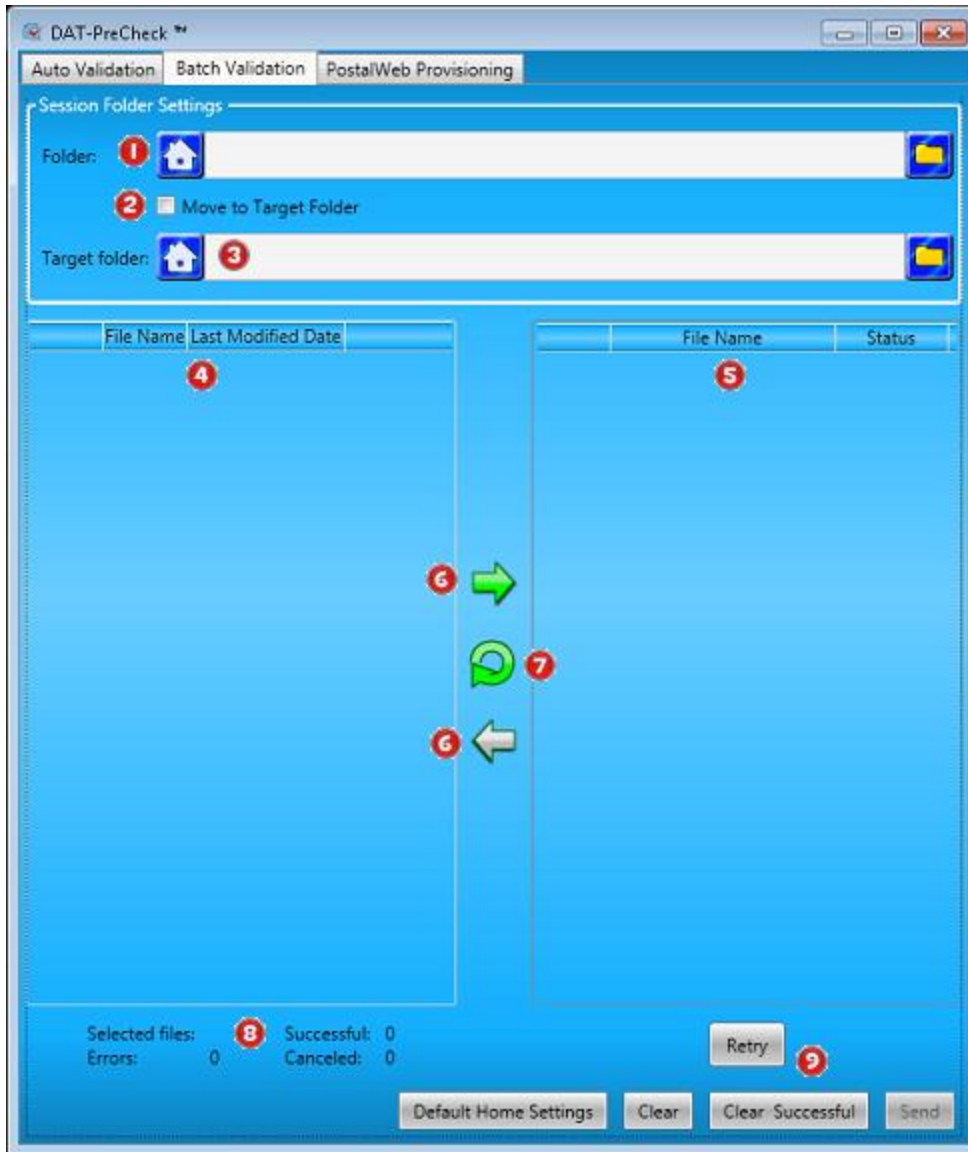
The 'Batch Validation' tab is made up of the following:



- Folder 1** : This is a folder, selected by using the corresponding browse folder button , where the Mail.dat files that have not been sent to PW are located. Unless the Folder selected is set as the system default (see call-out **8** below), the user will have to select it each time the utility is launched. Non-default folder settings are not saved between sessions.

Even if the Folder is set as the default, the Folder to be used for a specific session can be changed at any time by clicking the Folder's corresponding browse button .

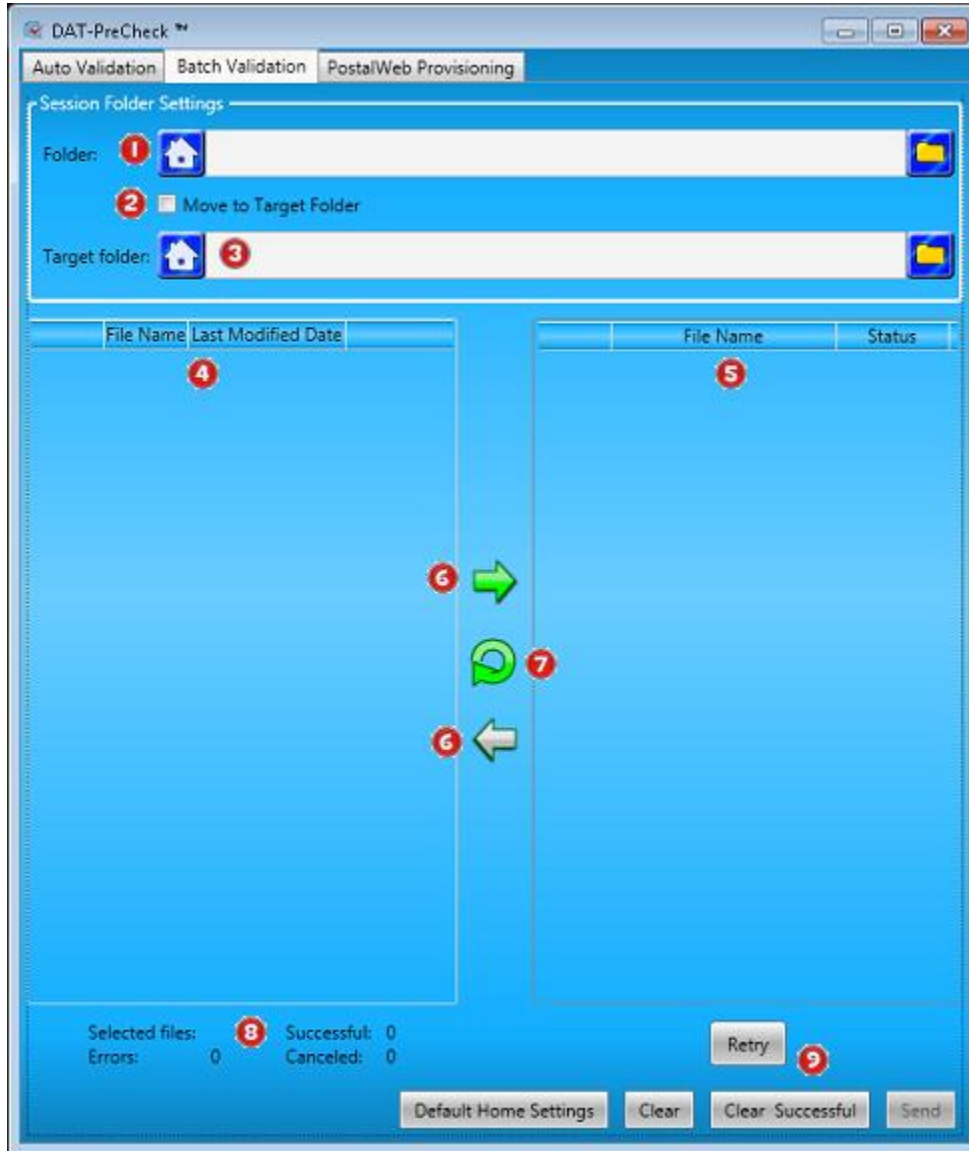
The non-default Folder specified will revert back to the default setting when the utility is closed and relaunched. To revert back to the default during a session, click the Folder's corresponding home button .



- **Move to Target Folder** (2): When this option is enabled (checked), selected files that are successfully sent to PW are moved from the folder they were originally located in and selected from, to a specific Target Folder (3) that is specified by the user. If this option is enabled, but a Target Folder is not specified, the **Send** button will not become active or enabled. Moving the sent files assists with identifying files that were already sent to PW. This option can be enabled or disabled at any time during a session. If this option is not enabled, Mail.dat files that are successfully sent to PW will remain in the original Folder (1) where they were selected from by the user.

i Mail.dat files can be sent to PW multiple times to be able to view any updates to the database that may occur after 24 hours.

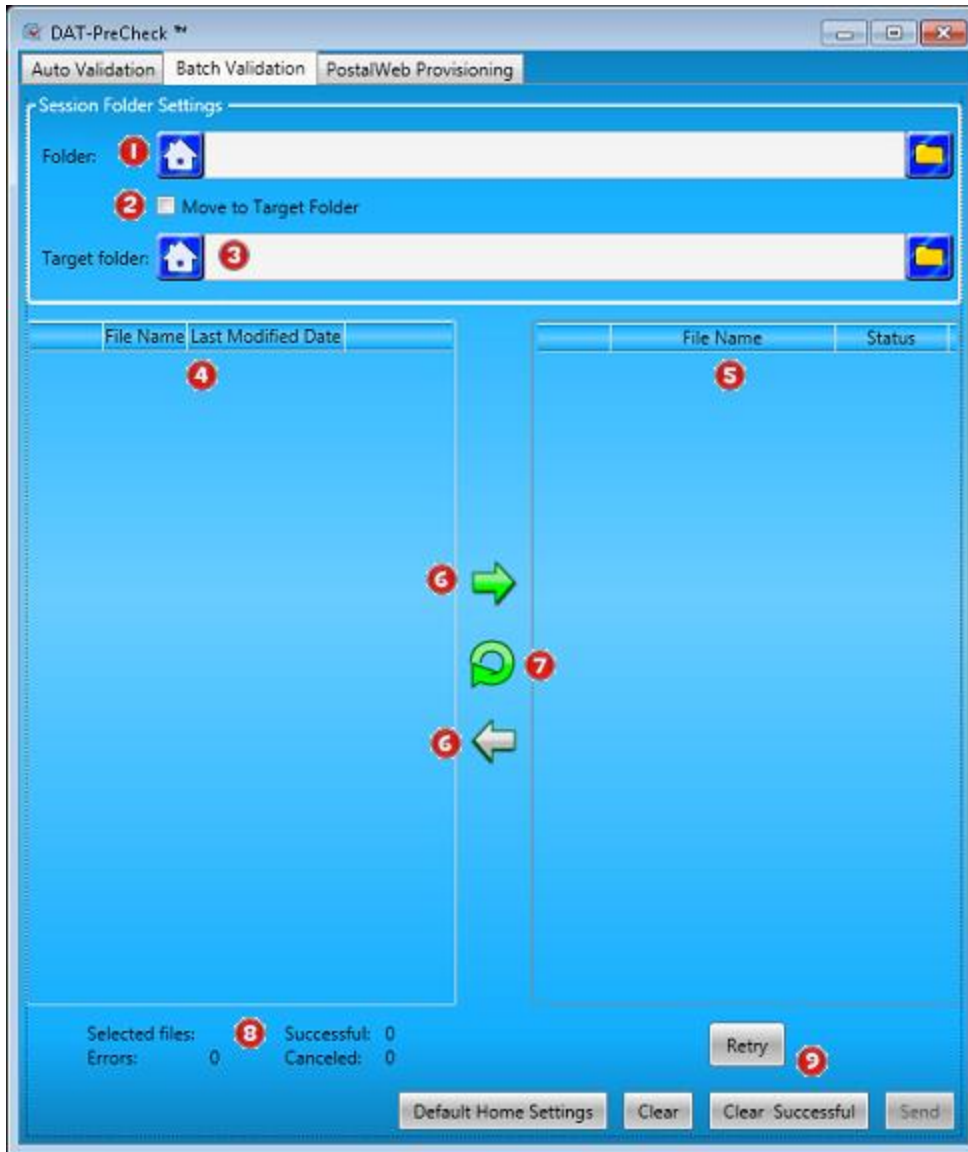
Component Description & Use




- **Target Folder** (3): The Target Folder, selected by using the corresponding browse button (2), is where files that are successfully sent to PW are moved to by the system if the 'Move to Target Folder' (3) option is enabled (checked). Unless the Target Folder selected is set as the system default (refer to call-out (8) below), the user will have to select it each time the utility is launched. Non-default folder settings are not saved between sessions.


Even though a Target Folder is set as the default, the Target Folder being used for a specific session can be changed at any time by clicking the Target Folder's corresponding browse button (2).

The non-default Target Folder specified will revert back to the default setting when the utility is closed and relaunched. To revert back to the default during a session, click the Target Folder's corresponding home button (1).

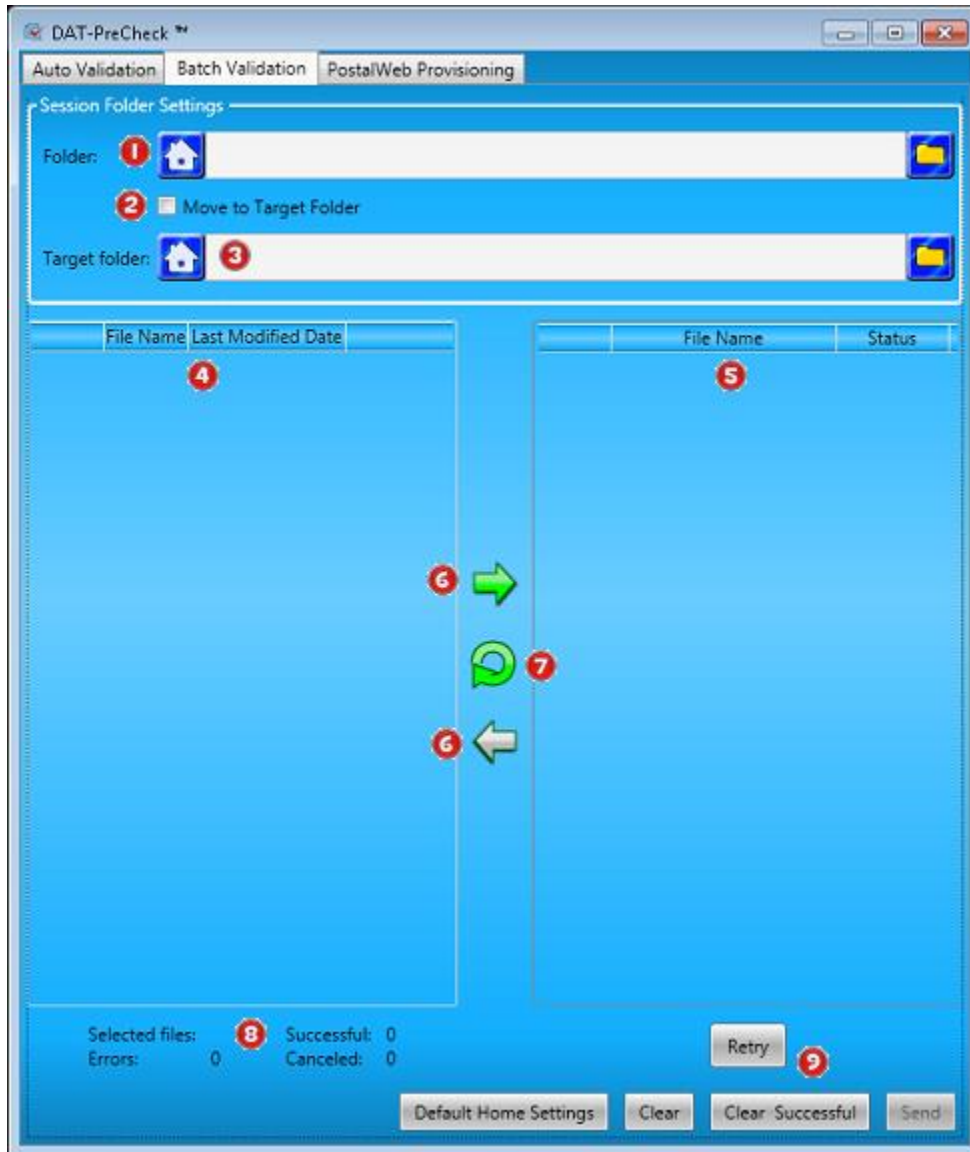


- **Available Files Window** (4): This window will display all of the Mail.dat files that exist in the Folder (1) selected by the user; specifically, the File Name of the Mail.dat file, and the Last Modified Date of the Mail.dat file. If a user wishes to select a file to send to PW, he or she would single click the Mail.dat file to select it and then click the right arrow button (6) to move it from the *Available Files Window* to the *Selected Files Window* (5) (another method would be to click, hold and drag a single file from one window to the other). Selecting/moving a Mail.dat file(s) does not send it to PW. Not until the **Send** button is clicked does the file(s) get sent.

 *To singularly select multiple files to move simultaneously, hold the 'Ctrl' key on the computer's keyboard while at the same time, single clicking on each Mail.dat file to select it. When all of the desired files are selected, click the right arrow button to move them.*

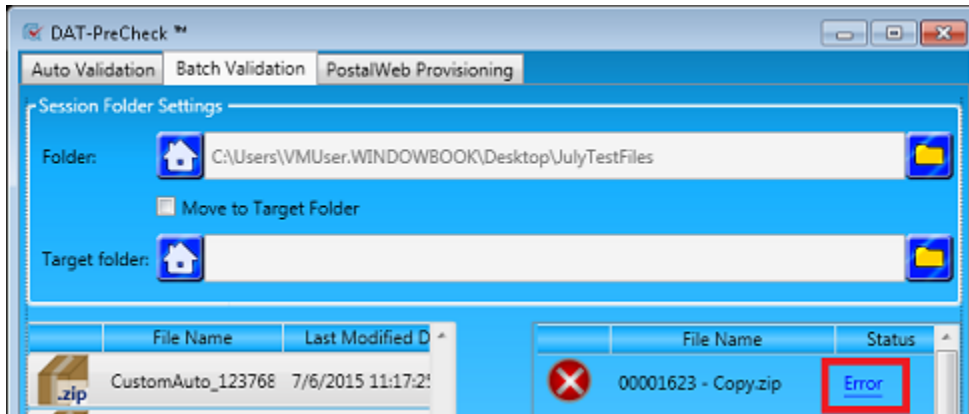
 *To select a block of files to move simultaneously, select the first file in the block, then hold down the 'Shift' key on the computer's keyboard and click the last file in the block. The first file*

selected, the last file selected, and all of the files in between will be selected. When this is done, click the right arrow button to move the files.

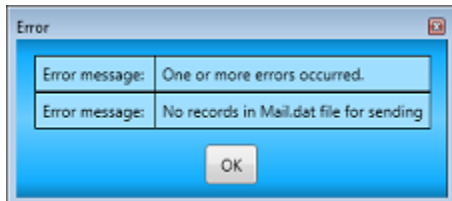


- **Selected Files Window 5:** This window will display any Mail.dat files selected by the user for sending to PW; specifically, the File Name and the Status. The possible statuses that can be returned are: Success, Error, and Canceled.
 - **Success:** File was successfully sent/received by PW. An e-mail notification and report will be generated by PW;

- **Error:** An error occurred that denied the receipt of the send request by PW. The “Error” status will be a hyperlink.

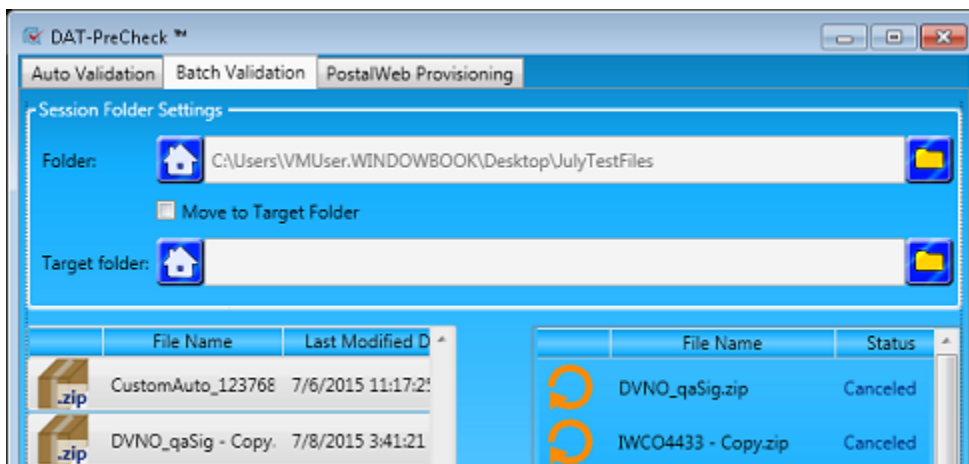


Click the hyperlink to display a dialog that will contain a description of the error that occurred.



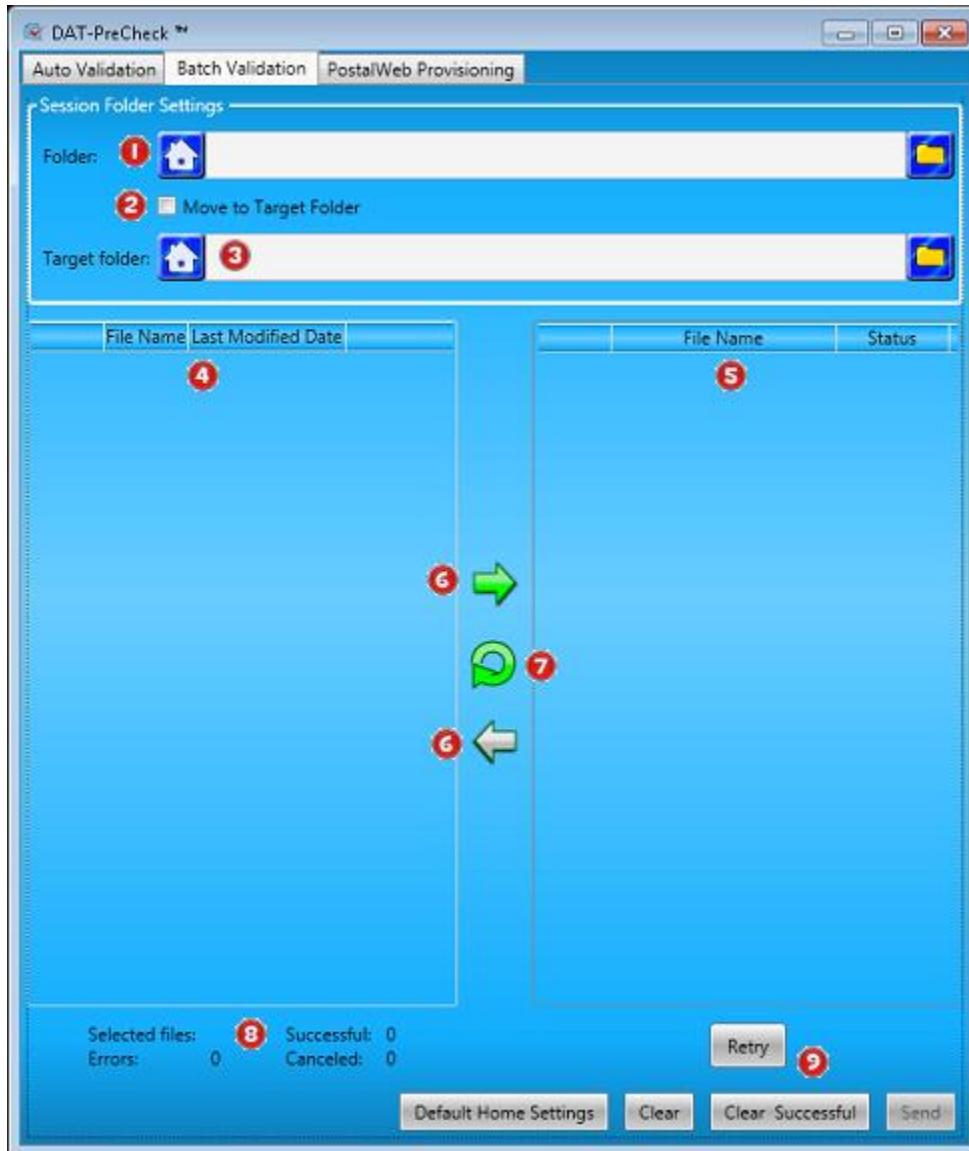
Click the **OK** button to close the dialog.

- **Canceled:** A send request was manually canceled by the user before being received by PW. These files can be selected and sent again by clicking the **Retry** button, as long as whatever caused the error or cancellation has been resolved (refer to the information provided about the **Send/Stop** button found under **Function Buttons** below for more information on canceling send requests).



Component Description & Use

Once files are selected, they can either be sent to PW by clicking the **Send** ⁹ button, or they can be de-selected and moved back to the *Available Files Window* ⁴. This is done by selecting them and clicking the left arrow button ⁶.

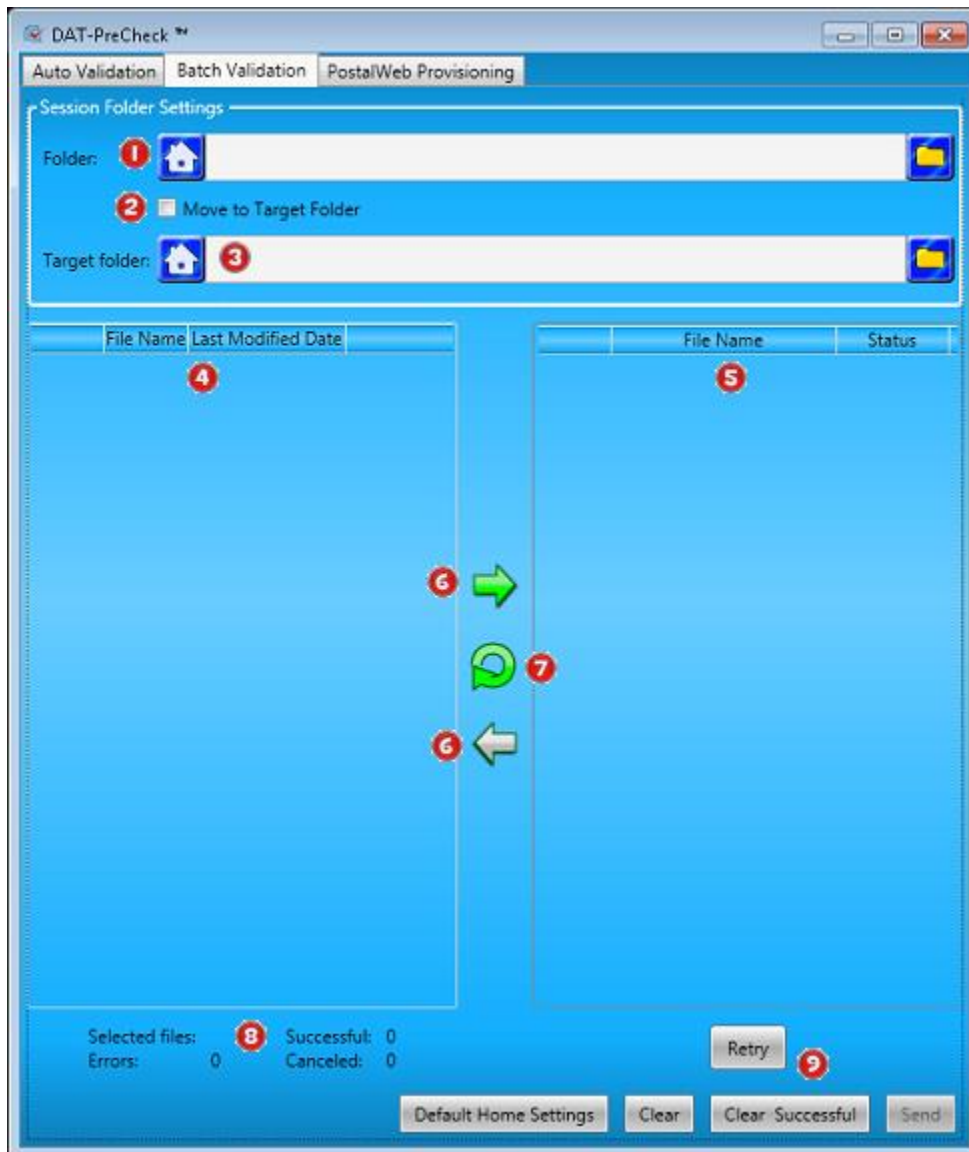


When multiple, unsent files are displayed the user cannot choose only one of, or a subset of those files to send. Any/all Mail.dat files that are displayed in this window that have not yet been sent will be sent to PW when the **Send** ⁹ button is clicked.

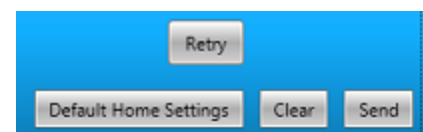
Files that were already sent successfully can be sent again by clicking the **Retry** button ⁹. Mail.dat files can be sent multiple times, if necessary, no matter what their status is.

- **Right and Left Arrow Buttons** ⁶: These arrows are used to move selected files between the *Available Files Window* ⁴ and the *Selected Files Window* ⁵.

- **Refresh Button 7**: Clicking the refresh button updates or refreshes the display so that the current contents of the Folder 1 are displayed in the Available Files Window 4.

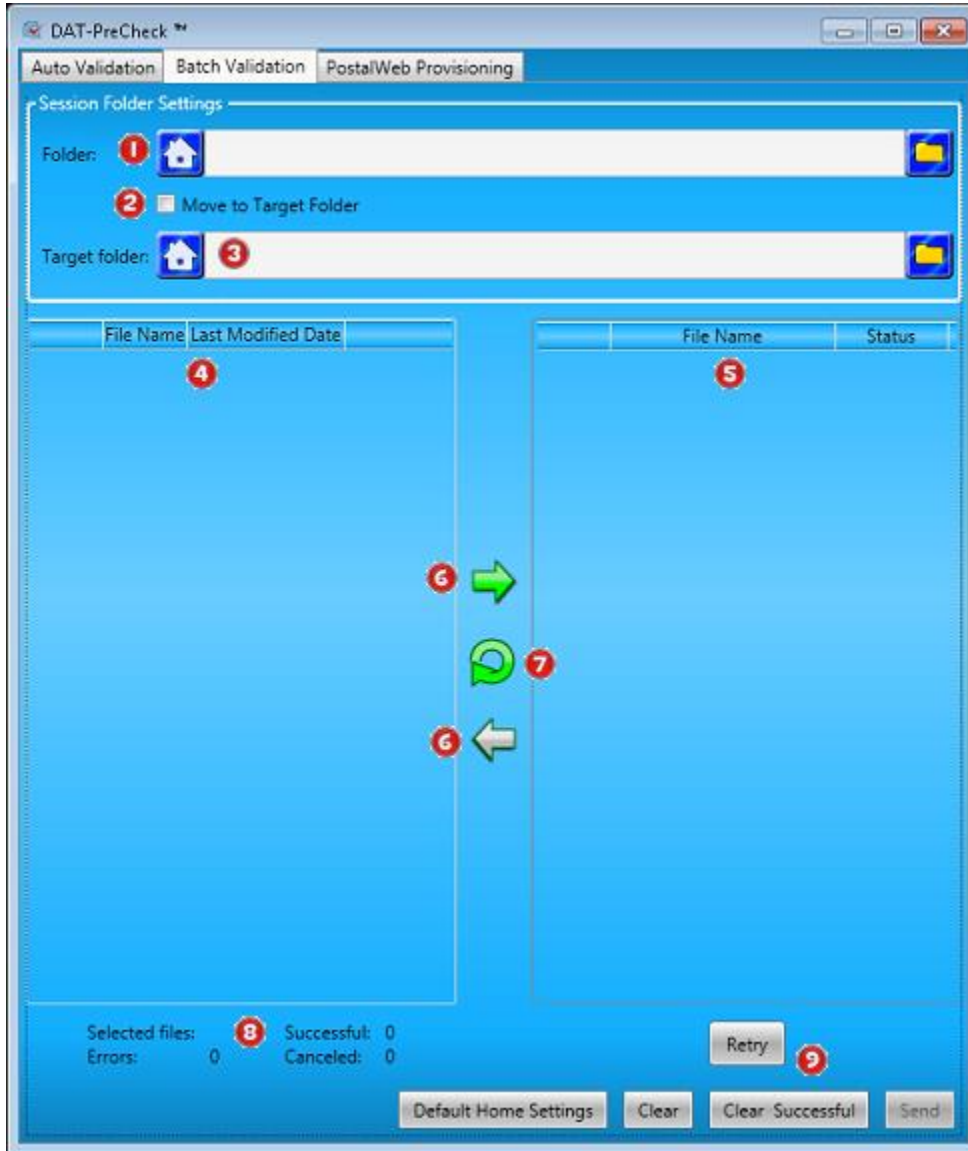


- **Session Counts 8**: These counts provide the sum of activity that has occurred in the active session for: the number of files that are currently selected (i.e. Selected Files); and the four possible send states: Successful, Errors, and Canceled. Once the session ends, i.e. the utility is exited or closed, the numbers re-set to zero. Counts are real-time and get updated as their numbers change during the active session.
- **Function Buttons 9**: The function buttons consist of: **Retry**; **Default Home Settings**; **Clear**; and **Send**.

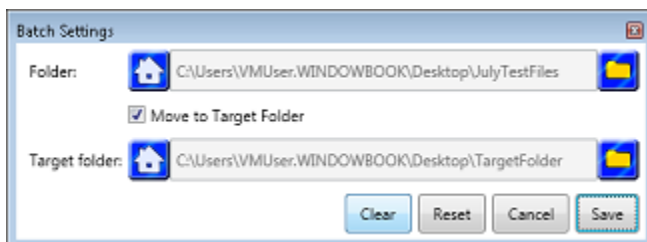


- **Retry**: Clicking this button re-sends all files, no matter what their status is (i.e. 'Success', 'Error', 'Canceled'), to PW.

Component Description & Use





- Default Home Settings:** Clicking this button launches the *Batch Settings* screen, within which, the default Folder (1) and Target Folders (2) are specified. DAT-PreCheck will default to these folder settings every time the utility is launched. In addition, whether or not the 'Move to Target Folder' option is enabled as a default is controlled in this screen.

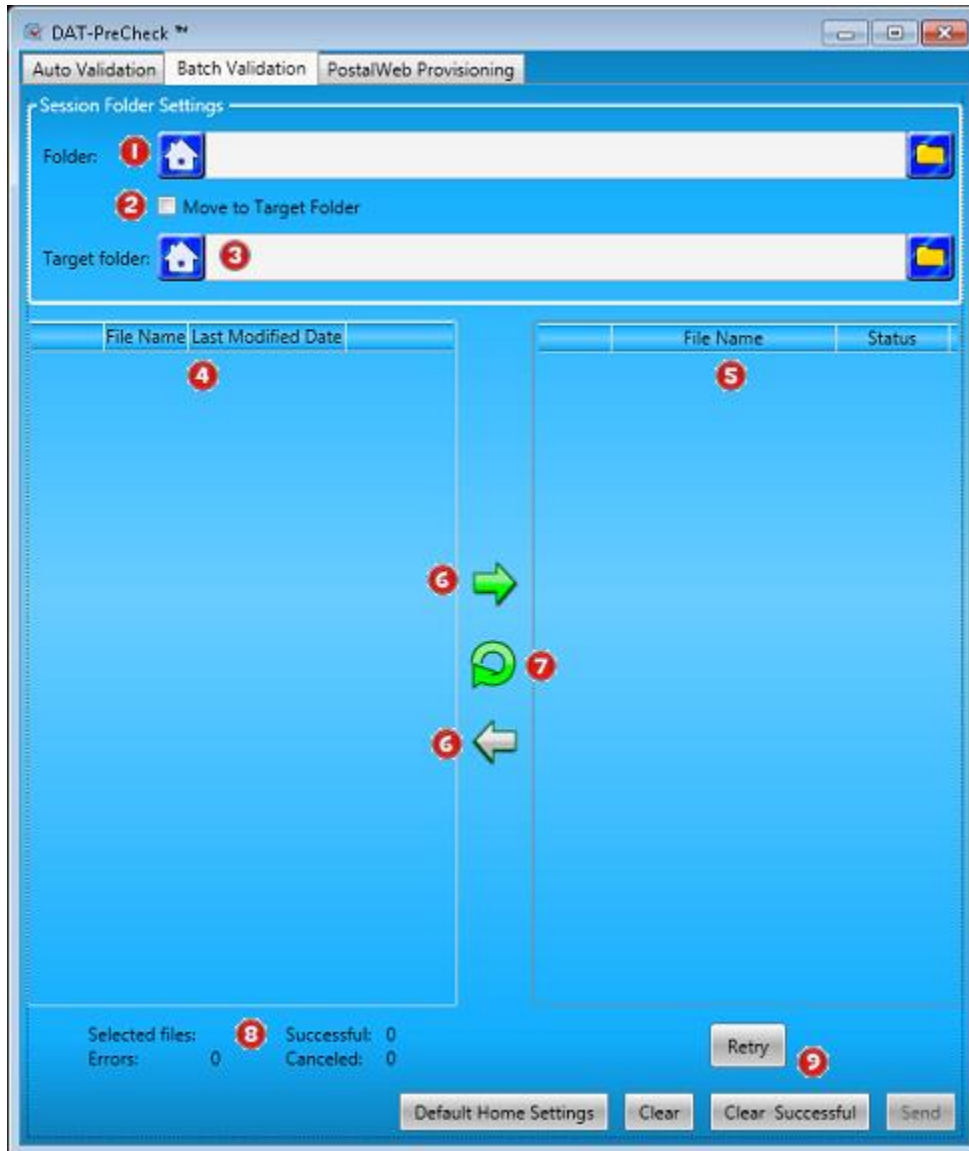




Anytime the 'Browse Settings' screen is accessed during a session and the SAVE button is clicked to close the screen, any existing folder settings in the 'Batch Validation' tab/screen will be changed to the default settings.

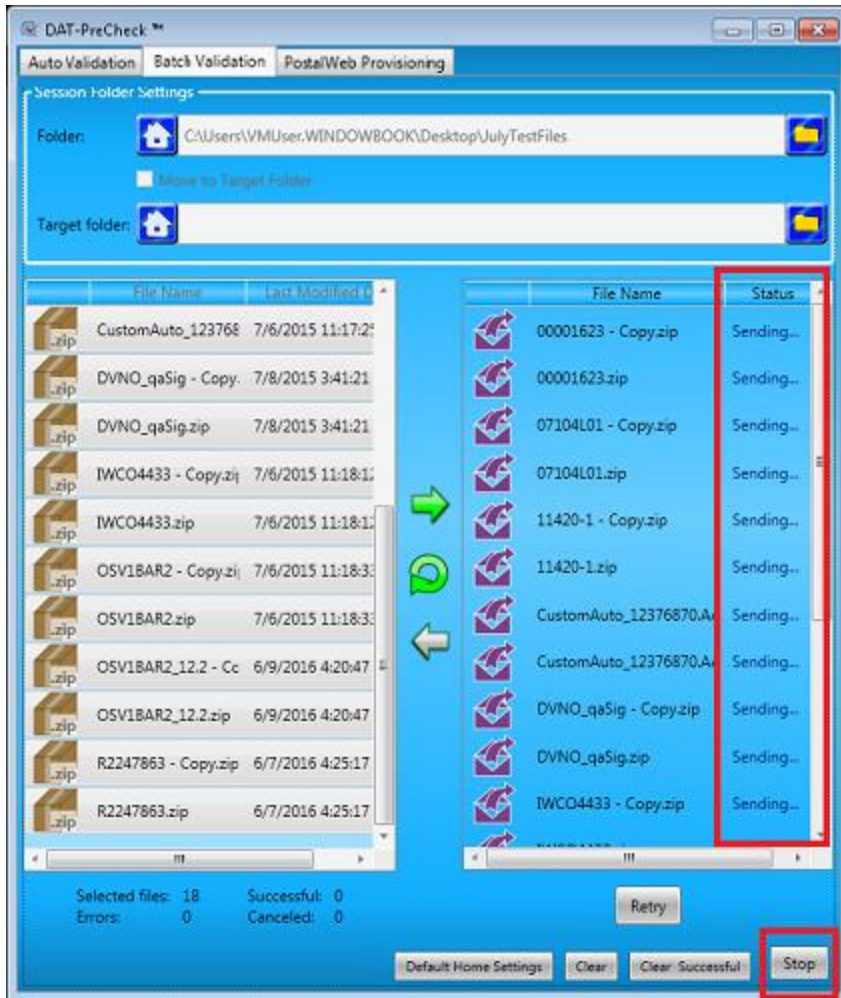
- To set or change the default settings for either of the two folders, click the folders' corresponding browse folder button  to navigate to, and make a folder selection.
- To have the 'Move to Target Folder' option enabled as a default, select (check) it.
- To remove or delete all of the existing default settings, click the **Clear** button.
- If modifications are made to the existing settings and the wish is to revert back to the original defaults, as long as the **Save** button has not been clicked, the user can click the **Reset** button and all of the settings will revert back to the previously set defaults.
- If a change is made to one of the folder settings, the folder's corresponding home button  can be clicked to revert back to the previously set default for that folder as long as the **Save** button has not been clicked.
- To close the *Batch Settings* screen without saving any changes made, click the **Cancel** button.
- To save the current default settings and close the screen, click the **Save** button.

Component Description & Use



- **Clear:** Clicking this button clears the Mail.dat files with a status of 'Error' and 'Canceled' from the *Selected Files Window* (5) and resets the corresponding session counts (8) accordingly.
- **Clear Successful:** Clicking this button clears the Mail.dat files with a status of 'Success' from the *Selected Files Window* (5) and resets the corresponding session counts (8) accordingly.
- **Send/Stop:** Clicking this button sends any unsent Mail.dat files displayed in the *Selected Files Window* (5) to PW; as well as, files that have an 'Error' or 'Canceled' status. Files that have a status of 'Success' cannot be sent to PW again using this button. To re-send files with a status of 'Success' to PW, select the file and click the **Retry** button.

If a user sends numerous Mail.dat files to PW simultaneously, the label on the **Send** button will change to read “Stop”. These types of send requests can be canceled by clicking the **Stop** button.



- Any Mail.dat files that did not reach PW will return a status of ‘Canceled’.
- Some of the Mail.dat files may also return a status of ‘Error’ if the request was received by PW, but was unable to be processed before the Stop command was issued (refer to **Error** under *Files To Send Window* ⁵ above for more information on handling files with an “Error” status).

Component Description & Use


- For files that are received by PW and are able to be processed before the Stop command was issued, they will return a status of 'Success' and an e-mail notification with report will be sent.



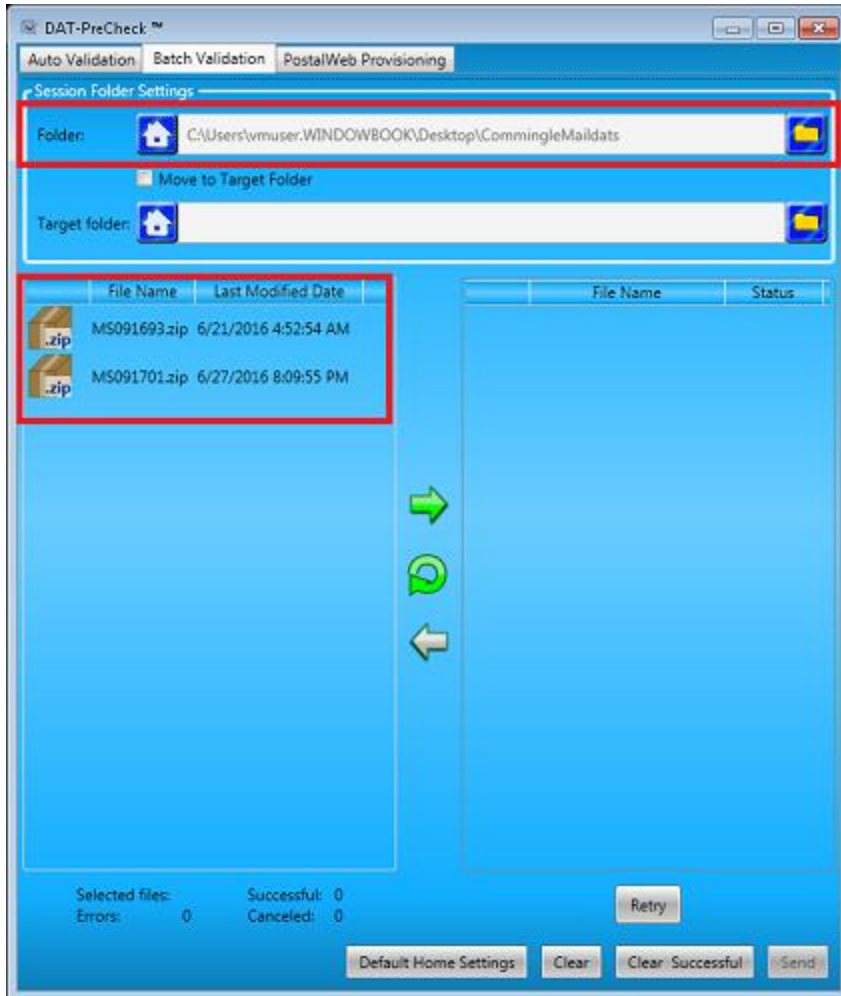
Sending A File Via Batch Validation

i This procedure assumes DAT-PreCheck has already been installed and provisioned, and the DAT-PreCheck service has already been enabled in PostalWeb to receive the service's e-mail notifications (refer to the [INSTALLATION](#) section in this Guide for more information).

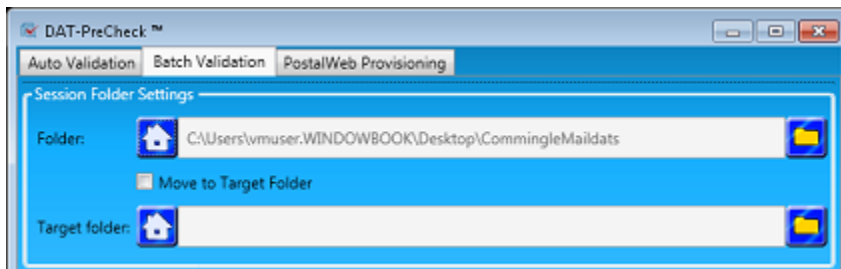
To send a Mail.dat file to PW, perform the following:

1. Launch DAT-PreCheck;
2. In the 'Batch Validation' tab, select the 'Folder' where the available Mail.dat files for sending to PostalWeb are located by clicking the corresponding Folder browse button . When the

Folder is selected, any Mail.dat files that are located in that Folder will display in the Available Files Window on the left;

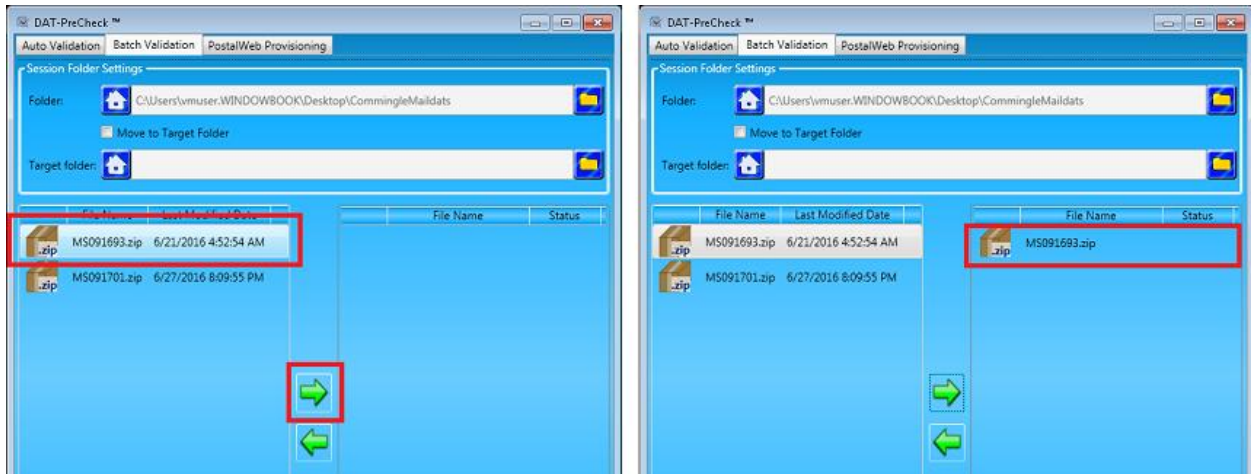



3. Decide whether or not to move the successfully sent files to a 'Target folder'. In the example being here, the option 'Move to Target Folder' is not enabled; therefore, a Target Folder is not specified;



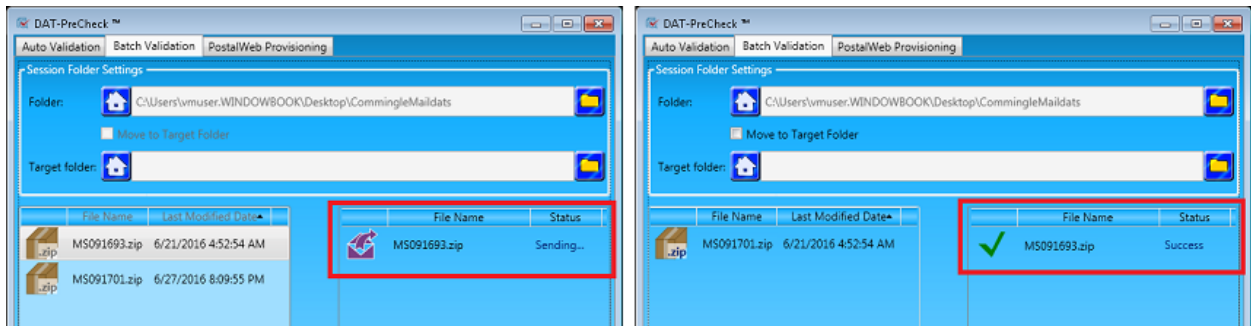
Component Description & Use

4. Select a Mail.dat file(s) from the *Available Files Window* and click the right arrow to move the file(s) to the *Selected Files Window* (in the example being used here, the MS091693.zip file is selected and moved);



i *Selected/moved files that have not been sent, can be de-selected and moved back to the Available Files Window by selecting it in the Selected Files Window and clicking the left arrow button .*

5. Click the **Send** button. An icon will display that shows the file is being sent and the 'Status' field will update to show that the file is "Sending...". When the send is finished successfully, the icon will change to display a green check mark, and the 'Status' field will read "Success".



6. Within the next few minutes, once PW has been able to match the data in the Mail.dat file against the Client’s own PW database, PW will generate an e-mail notification to all qualified recipients (refer to [ENABLE THE SERVICE](#) for more information) containing a results report in PDF format. The e-mail notification and generated report uses the Mail.dat file’s Job ID and Job No. The e-mail itself provides a brief synopsis of the information contained in the report as far as how many rows were returned, how many errors, warnings, NPA issues, etc. were returned. In the example shown below, the attached report contained no MID, CRID or NPA errors;



To assist with insuring the successful receipt of e-mail notifications from PostalWeb, follow the guidelines outlined on our “White List Help” web page:
<http://www.windowbook.com/Home/White-List-Help>.

Component Description & Use

- Double click on the PDF to open and view it. The report will display the result of each mail owner item that was in the sent Mail.dat file – a comparison of each item against what was found in the Client’s PW database, as far as By/For, NPA, IMB, STID, and Labeling List information;

i *STID verification is only provided if the PDR or PBC file is included in the Mail.dat.*



SEG eDoc Sender CRID: 12121212 Company Name: ROBERT DORRE
 HDR eDoc Sender CRID: 7474747 Company Name: PAC MAILING SERVICES
 Mail Class: Standard Mail

DAT-PreCheck Report for job:00013813 Test Job A 9/24/2018 2:30 pm

Validate Type	CPT ID	MPA ID	NP	NPA	Mail Owner	Mail Owner City, St, ZIP+4	MO CRID	MO MID	Results	Prim ID Value
CPT CRID Validate	1	1	Y	458854	TC WORKS	CAMBRIDGE, MA 02139-3781	100010		NPA	100010
Mail Preparer					ROBERT DORRE	SHOREWOOD, IL 60404-8195	14350694			
<i>NPA 458854 is not linked to the Primary CRID – this mail will NOT qualify for Non-profit rates</i>										
CPT MID Validate	1	1	N		TC WORKS	CAMBRIDGE, MA 02139-3781	2442173	901264001	Warning	901264001
Mail Preparer					ROBERT DORRE	SHOREWOOD, IL 60404-8195	2442173	901264001		
<i>Mail Owner CRID is the same as Mail Preparer CRID – If you are a Mail Service provider, this is an assessable error</i>										
<i>Mail Owner MID is the same as Mail Preparer MID – If you are a Mail Service provider, this is an assessable error</i>										

LABELING LIST COMPLIANCE

Mailing does not comply with USPS regulations: Labeling list is too old.

Presort Labeling List Effective Date (CSM-1189): 8/1/2017

Scheduled Induction Date (CSM-1117): 9/14/2018

IMB VALIDATIONS

IMB MIDS:

MID	MID Owner	MID Owner City, St, ZIP+4
100002	PAC MAILING SERVICES	CHARLOTTE, NC 28273-5794

IMB STIDS:

STID	STID Description
222	STANDARD MAIL, NO IMB TRACING, NO ADDRESS CORRECTION

- Make corrections to the Mail.dat file as needed (refer to [DAT-PRECHECK REPORT](#) for an explanation of the possible return results provided in a report). Any mail items that contain a “Requesting Data” result are automatically submitted to P1 by PW to attempt to retrieve the necessary/correct data. Mail.dat files should be sent PW a second time (the next day) to receive a new report containing the updated data, which should resolve those particular issues. Depending on the data received from P1, further action in regard to certain mail items may be necessary by the Client.

POSTALWEB PROVISIONING TAB

The 'PostalWeb Provisioning' tab is used to provision the utility with a Client's PostalWeb site and *PostalOne!* (P1). This tab is also where the P1 user credentials are stored. For more information about the 'PostalWeb Provisioning' tab, refer to [PROVISION THE UTILITY](#) in this Guide.

DAT-PRECHECK REPORT

The report generated by PW containing the results of the comparison between the data found in the Mail.dat file sent to PW from DAT-PreCheck against the PW database, is sent as a PDF attachment via e-mail notification to all qualified recipients (refer to [Authorizing Users](#) for more information).

It will display the status of each mail item found in the Mail.dat file that was sent in regard to the By/For, NPA, STID, and Labeling List information used. The intent of the report is to show the following:

- Which mail owners are being identified for each MPA/CPT combination;
- Whether or not that combination is for non-profit mail;
 - And if non-profit, whether the NPA is present and whether it belongs to the identified mail owner.
- Whether or not the STID class matches the Mail Class (only when PDR or PBC files are included); and
- Whether or not the Labeling List being used is current.



For more information on STIDs, refer to [What is a STID?](#) Below.

In addition, the report will also show when a Mail Service Provider (MSP) inserts their own MID or CRID in the "By" (i.e. preparer); as well as, in the Mail Owner MID or CRID. This scenario can be valid, but has the potential to be a mistake, as well.

The report will also warn of any by/for conflicts found and show mailers what the "primary" mail owner identifier was, based on a list of processing priorities.



DAT-PreCheck supports First Class mail, Standard Class, Periodicals, and Package Services (Bound Printed Matter).

The report consists of the following data elements (reported in columnar format):

VALIDATE TYPE	Mail Owner City, St, ZIP+4
CPT ID (Component ID)	MO CRID (Mail Owner CRID)
MPA ID	MO MID

Component Description & Use

NP (Y or N)	RESULTS
NPA (NPA number)	PRIM ID (Primary ID) VALUE
MAIL OWNER	

The different “RESULTS” (see table above) that can be returned in a report are:

“RESULTS”	Description	Correction Required? ¹
Match	Both MID and CRID identifiers were used in a mail piece, they matched and were found in the PW database.	N
Conflict	Both a mail owner MID and CRID are provided in the same mail piece but belong to different entities (i.e. are not linked).	Y
Requesting Data	Mail item’s mail owner MID or CRID has not been seen by, and is unknown to, PostalWeb. When this occurs, PW automatically sends a request to PostalOne! (P1) to get and return that information, at which time, it is added to the Client’s PW database. The Mail.dat file should be sent again the next day from DAT-PreCheck in order to receive the updated status or condition of that same mail item.	N
Invalid	When an identifier is not found in the Client’s PW database and when PW attempts to retrieve the data from P1, P1 reports that the CRID or MID does not exist.	Y
NPA/PERMIT/PUB	One or more are missing (i.e. NPA, PERMIT, and/or PUB)	Y
Not Found	The CRID and MID in both the CPT and MPA files are missing (fields are empty).	Y
Warning	Mail Owner MID or CRID is the same MID or CRID used for the Mail Preparer.	Maybe

Warning or error messages are also displayed below each corresponding line item or, in the case of IMB MIDS and STIDS, at the bottom of the report, and are highlighted in yellow. Warning/error messages that could be displayed are:

1. “MPA Preparer CRID/MID is Empty, Please update mail.dat with a CRID/MID to show who the preparer is”
2. "MPA: Preparer MID XXXX MPA: Preparer CRID YYYYY Not found in database, requesting data"


¹ Refers to actions needed by the Client to resolve the issue within the corresponding Mail.dat file.

3. "MPA: Preparer MID and Preparer CRID are empty"
4. "No Data Found for MID XXX"
5. "MPA Preparer MID: XXXXX Not found in database, requesting data"
6. "No Data Found for Preparer CRID XXXXX"
7. "CRID XXXXX isn't linked to the MID XXXXX"
8. "MPA Preparer MID XXXXX is not linked to the Primary Preparer CRID"
9. "MPA CRID XXXXX is not the same as primary CRID XXXXX"
10. "No Data Found: CRID is missing for MID XXXXX"
11. "No Data Found for CRID XXXX"
12. "Preparer MID XXXXX not linked to the Preparer CRID XXX, YYYY, ZZZZ."
13. "MPA: Preparer MID XXXX MPA: Preparer CRID YYYY Not found in database, requesting data"
14. "MPA: Preparer MID and Preparer CRID are empty"
15. "No Data Found for MID XXXXX"
16. "CPT CRID/MID and MPA CRID/MID for the Mail Owner is Empty, Please update mail.dat with a CRID/MID to show who the mail owner is."
17. "CPT: MID XXXX CPT: CRID YYYY Not found in database, requesting data"
18. "MPA: MID XXXX MPA: CRID YYYY Not found in database, requesting data"
19. "MPA Mail Owner Local Permit: XXXXX, ZIP+4: YYYYYY-ZZZZ Not found in database, requesting data"
20. "MPA Publication Number: XXXX, ZIP+4: YYYYYY-ZZZZ Not found in database, requesting data"
21. "CPT MID XXXX is not linked to the Primary CRID."
22. "MPA MID XXXX is not linked to the Primary CRID."
23. "CPT CRID XXXX is not the same as primary CRID YYYY,ZZZZZ,KKKKK,AAAAA"
24. "MPA CRID XXXX is not the same as primary CRID YYYY,ZZZZZ,KKKKK,AAAAA"
25. "NPA Number is missing"
26. "NPA XXXXX is not linked to the Primary CRID"
27. "NPA XXXXX is not Authorized"
28. "Mail Owner CRID is the same with Mail Preparer CRID"

Component Description & Use

- 29. "Mail Owner MID is linked to Mail Preparer CRID"
- 30. "Mail Owner MID is the same with Mail Preparer MID"
- 31. "No such STID. Invalid"
- 32. "Mail Class does not match STID Class"

Example:



SEG eDoc Sender CRID: 12121212 Company Name: ROBERT DORRE

HDR eDoc Sender CRID: 7474747 Company Name: PAC MAILING SERVICES

Mail Class: Standard Mail

DAT-PreCheck Report for job:00013813 Test Job A 9/24/2018 2:30 pm

Validate Type	CPT ID	MPA ID	NP	NPA	Mail Owner	Mail Owner City, St, ZIP+4	MO CRID	MO MID	Results	Print ID Value
CPT CRID Validate	1	1	Y	458854	TC WORKS	CAMBRIDGE, MA 02139-3781	100010		NPA	100010
Mail Preparer					ROBERT DORRE	SHOREWOOD, IL 60404-8195	14350694			
<i>NPA 458854 is not linked to the Primary CRID – this mail will NOT qualify for Non-profit rates</i>										
CPT MID Validate	1	1	N		TC WORKS	CAMBRIDGE, MA 02139-3781	2442173	901264001	Warning	901264001
Mail Preparer					ROBERT DORRE	SHOREWOOD, IL 60404-8195	2442173	901264001		
<i>Mail Owner CRID is the same as Mail Preparer CRID – If you are a Mail Service provider, this is an assessable error</i>										
<i>Mail Owner MID is the same as Mail Preparer MID – If you are a Mail Service provider, this is an assessable error</i>										

LABELING LIST COMPLIANCE

Mailing does not comply with USPS regulations: Labeling list is too old.

Presort Labeling List Effective Date (CSM-1189): 8/1/2017

Scheduled Induction Date (CSM-1117): 9/14/2018

IMB VALIDATIONS

IMB MIDS:

MID	MID Owner	MID Owner City, St, ZIP+4
100002	PAC MAILING SERVICES	CHARLOTTE, NC 28273-5794

IMB STIDS:

STID	STID Description
222	STANDARD MAIL, NO IMB TRACING, NO ADDRESS CORRECTION

i *The above example of a DAT-PreCheck report is a single page. Depending on the file/job, the generated DAT-PreCheck report can be multiple pages long.*

What is a STID?

STIDs are three-digit numeric codes that are embedded into the Intelligent Mail® barcode printed on mailing pieces. The STID tells the USPS critical information about the mail piece:

- The class of mail;
- The service option (Full-Service® or Basic);
- The address correction service desired (if any); and
- For Informed Visibility® subscribers, whether tracking is desired.

Due to the wide variety of classes of mail and services provided by the USPS, the listing of valid STIDs is quite extensive. There may be more than one STID used in the barcodes within a mailing. Details regarding [the use of STIDs](#) may be found on the PostalPro™ web site, as well as a [table of current STIDs](#).