





# **ABOUT THIS GUIDE**

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## **CONTACT INFORMATION**

### WINDOW BOOK, INC.

300 Franklin Street Cambridge, MA 02139

Corporate:	617-395-4500
<b>Client Services:</b>	800-524-0380
	postalspecialist@windowbook.com
Support:	Support Portal
	800-477-3602
	<pre>techsupport@windowbook.com</pre>
Fax:	617-395-5900
On the Web:	www.windowbook.com

# **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	ΤΥΡΕ	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 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

Commingled 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<sup>®</sup> 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!*<sup>®</sup> 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<sup>®</sup> 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<sup>®</sup>, 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<sup>®</sup> SQL Server<sup>®</sup> 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:

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

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

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



#### 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';



6. 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;



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;



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



 The DAT-PreCheck<sup>™</sup> 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<sup>™</sup> 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 taol is the ability to validate the Labeling List file dates that were used during the present 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 PostalOnel®.

Learn More about DAT-PreCheck

Requirements:



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



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;

InstallAv	ware Wizard
Ø	The InstallAware Wizard is verifying the contents of this setup package. This may take a moment.
	Çancel

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

Window Book DAT-PreCheck	(x64) Prerequisites
Welcome to the Setup Wizard for Window Book DAT-PreCheck (x64). This wizard guides you through installing this program and all required components.	Window Book DAT-PreCheck (x64)
Click Next to continue.	Window Book Inc.
Window Book, Inc.	< Previous Next > Cancel

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;

Window Book DAT-PreCheck	(x64) Setup	
Some components may require that you	WINDOW BOOK, INC.	
restart your computer if files being updated are currently in use.	MASTER SOFTWARE LICENSE AND SERVICES AGREEMENT	
	This Master Software License and Services Agreement ("Agreement") is between Window Book, Inc. ("Window Book", "we", "our" or "us"), a Massachusetts corporation with principal offices located at 300 Franklin Street, Cambridge, Massachusetts 02139 and the party named above ("Customer", "you" or "your"),	
	I have read, understood and agreed to the terms of the End User License Agreement and so signify by clicking 'I accept the terms of the License Agreement' and proceeding to use this product.	
To install, you must accept the End User License Agreement.	👿 I accept the terms of the License Agreement	
Window Book, Inc.	< Previous Next > Cancel	

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

i Please review important	installation notes before continuing with setup.	
Window Book DAT-PreCheck Rele	ease Notes	
DAT-PreCheck Version 8.1.10.63		H
IMPORTANT Messages:		
Support for Scheduler 8.14.0.133	and Mail Drop Engine 8.1.15.197	
Known Issues:		
None		
Bug Fixes:		
None		
Enhancements:		
T12921, T13088, T12852 - Rename	d product to DAT-PreCheck	
ByFor Validate Version 8.1.10.60		
IMPORTANT Messages:		
Click Next to continue	This information supersedes your printed documentat	ion and manuals.

1

### 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 <u>step 16</u> in this procedure.

X 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;

Window Book DAT-PreCheck (x	54) Prerequisites
Microsoft SQL Server Options Please select how to connect to SQL Server SQL Server Source I need to install SQL Server Express on this Machine I will use an existing SQL Server	Installation Options Help         1. If using an existing Server, select a SQL Server from the "Instance Name" Dropdown List.         2. If the list is empty or a known SQL Server is not listed you may type the Server name and optionally the Instance name e.g. MYSERVER\SQLEXPRESS. Optionally enter a Port if needed.         3. If Server Authentication is available and selected, enter the Username and Password provided by your Database Administrator.         4. Click Next to test the connection using the selected Authentication Mode.
Window Book, Inc.	Next > Cancel

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.

Testing Connection	
Nease wait while setup attempts to connect to he specified server	WindowBook
	Window Book DAT-PreCheck (x64)
	Window Book Tor

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;

Window	Book(x64) - InstallAware Wizard	
0	Success! Connection test was successful.	
	ОК	

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

Window Book DAT-PreCheck	(x64) Setup
Choose the application folder. The chosen folder will contain files belonging to this product. Some files may be installed in other locations on your system.	Product install path: CVProgram Files/Window Bock/DAT-PreCheck Browse Disk space requirements: Available: 35,287 MB Required: 52,825 KB Remaining: 35,235 MB
Window Book, Inc.	< <u>Previous</u> Cancel

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;

Choose the Start Menu group. A new program group will be created in your Start Menu to contain product icons. You may create icons for all users to see, or just for yourself.	Start Menu group: Mindow Book. NET Create shortcuts for: All users of this computer All users of this computer can see and use the product shortcuts Duly you may see the product shortcuts Pin to Start Menu Pin to Task Bar Create a Desktop Shortcut
---	---

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

icrosoft SQL Server 2017 Express Setu	р	
ease select database engine, and data directorie	s	Windown
Instance root directory:		American Andrew
Program Files/Microsoft SQL Server/	Browse	
Data root directory:		
VProgram Files/Microsoft SQL Server/MSSQL 17 SQL F	Browse	
Shared Features		
Shared feature directory:		
C:\Program Files\Microsoft SQL Server\	Browse	Window Book DAT-PreCheck (x64)
Shared feature directory (x86):		
C:\Program Files (x86)\Microsoft SQL Server	Browse	

### Installation

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

Window Book DAT-PreCheck	(x64) Setup
Ready to update your system. The InstallAware Wizard has collected all required information and is ready to update your system configuration.	Window Book DAT-PreCheck (x64)
Click Next to continue.	Window Book Inc.
Window Book, Inc.	< <u>Previous</u> <u>Next&gt;</u> Cancel

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;

	Window Book DAT-PreCheck (x64)
OUNT(name) FROM sys.databases WHERE name = NWbdb ount(a permission_name)	1=0
DUNT(name) FROM sys.databases WHERE name = NWbdb ount(a.permission_name)	) = 0 Window Book

### DAT-PreCheck™ Installation & User Guide

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;

Window Book DAT-PreCheck	(x64) Setup
Window Book DAT-PreCheck (x64) Setup is complete. You have successfully completed the Window Book DAT-PreCheck (x64) Installation Wizard.	WindowBook
☑ Run Window Book DAT-PreCheck (x64)	
	Window Book DAT-PreCheck (x64)
	Window Book Inc.
Window Book, Inc.	< <u>Erevious</u> Einish Cancel

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 <u>PROVISION THE UTILITY</u> 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. 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 <u>PostalWeb® for Mail Service Providers - Setup Guide</u>.

😪 DAT-PreCheck 🍽		- • •
Provisioning	Click on the link below to begin your provisioning proce already received your API KEY and API ACCESS ID, procee	ss. If you have
http	s://www.postalwebdev.net/Account/Company	Exit
Credentials *API ACCESS ID:		
*API KEY:		
✓ Verify Credentials		Test Internet Connection

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.

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.

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: <a href="http://www.postalweb.net/">http://www.postalweb.net/</a>. Click the 'Login' link;

€ 3 🛛 www.postalweb.net				⊤ C'	Q. Search	습	Ó	◙	٠	î	Q	≡
Login 1.800.524.0380								G	iet Sta	irted t	oday	î
S Postal Web®	About Us	Products	Contact									

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

					0.04
https://www.postalwet	unet/Account/LogO	n			 D+mc
Login 1.800.524.0380					
6.	About Us	Products	Contact		
S Postal Web	,				
Login Information					
User name*					
Enter your user name					
Password*					
Enter your password					
Remember Me?					
Log In					
cog m					
	Forg	ot your Passw	ora? Forgot yo	ur User Name?	

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

App Store			
	 ×	0	0

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

### DAT-PreCheck™ Installation & User Guide

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;

MSP 0
Manage API Credentials o
API Access ID 😧
2F1CSE90595015019F90
API Key 0
Show
Generate New API Credentials

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;

🐼 DAT-PreCheck ™			
Provisioning PostalWe	Click on the link below to b already received your API KE https://www.postalweb.net/	egin your provisioning process. If you have Y and API ACCESS ID, proceed to Credentials Account/Company	(i) Exit
Credentials		•	
*API ACCESS ID:	25106699535059649556		
*API KEY:			
Verify Credentials			est Internet onnection



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

8. Highlight the API Key and copy it;

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);

MSP 0

API Access ID 🛛 🔞

API Key

Show

27105890525065019F90

Generate New API Credentials

MSP 0

API Access ID 😧

API Key 💡

Hide API Key

Generate New API Credentials

Manage API Credentials 0

5555955569175557095487752695513877255547

0

0

0

Manage API Credentials 0

🐼 DAT-PreCheck ™	
Provisioning	Click on the link below to begin your provisioning process. If you have already received your API KEY and API ACCESS ID, proceed to Credentials     Exit
	https://www.postalweb.net/Account/Company
Credentials	
*API ACCESS ID:	
*API KEY:	Fir subhk kuldadta Dertudakar sesti 17
✓ Verify Credentials	Test Internet Connection

 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');

Provisioning		
S PostalWeb	Click on the link below to begin your provisioning process. If you have already received your API KEY and API ACCESS ID, proceed to Credentials	() Exit
ht	tps://www.postalweb.net/Account/Company	
	Re-Provision Remove Provisioning	
PostalOnel Credentials		
*User Name:		
*Password:		
Confirm Dargunget		

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;

🐼 DAT-PreCheck 🎽	
Provisioning	
S Postal Web	Click on the link below to begin your provisioning process. If you have already received your API KEY and API ACCESS ID, proceed to Credentials
ht	tps://www.postalweb.net/Account/Company
	Re-Provision Remove Provisioning
- PostalOne! Credentials	
*User Name:	No. 1 h@ wax or the norm
*Password:	******
*Confirm Password:	******
Provisioned Information	
Company ID:	4
Company Name:	Shasta, Inc
Select Location:	1, First Location, 02139, MA -
Location ID:	2, 2nd Location, 03071, NH
Location Name:	1, First Location, 02139, MA
Zip Code:	02139
State:	MA
CRID:	
	Save Save

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

uto Validation	<b>Batch Validation</b>	PostalWeb Provis	ioning					
iession Folder S	ettings							
input folder:	C:\Users\Public	C:\Users\Public\Documents\Window Baok\wbDPC\AutaImport						
Processed folder	C:\Users\Public	\Documents\Windo	ow Book\wbDPC\A	utoProcessed		6		
Failed folder:	C:\Users\Public	Documents\Windo	ow Book/wbDPC\A	utoFailed		6		
	-					_		
1	File Name	Status	Added		Processed			
		New files: 0	Successful:	0				
		New files: 0 Failed: 0	Successful: Requested:	0				

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.

### Inabling 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 email notifications with attached reports to individuals within their company (refer to <u>Authorizing Users</u> 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;

Laura Logout 1.80	00.524.0380	1			App Store	۰	*	0	0
S Postal We	My Dashboard	EDocs MSF	Reporting	2					
							YO	UR LOGO	HERE
Dashboard Statistics								<b>Q</b> Sho	w
Services 3 CSR Statement Release			No Submission:	s Available					

 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;

Laura Logout 1.800.524.0380	* 🌢 🥹
My Dashboard EDocs MSP Reporting 🕿	
EDocs 9	YOUR LOGO HERE
Services O	
Through our automation services below, you will speed up the delivery of your PostalOne1® statements and statement of are interested by clicking the "Off" button to enable that service.	lata. Select the service you
FIN Statement PDF	•
FIN Statement Data XML	•
UPD Documents PDF	•
3rd Party	•
EDocs	
DAT-PreCheck	
Get Your By/For, NPA, IMB, STID, and Labeling List Validation Report	

 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 <u>Authorizing Users</u> 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: <u>http://www.windowbook.com/Home/White-List-Help</u>.

### **Authorizing Users**



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

1. From the main menu bar, click the 'MSP' menu option;

EDocs Dashboard - Internet Explorer			_ @ ×
COC Thttps://shasta.postalweb.net/EDocs	오호 🔒 🖘 😽 EDocs Dashboard	×	6 🛠 🟵
Laura Logout 1.800.524.0380		App Store	* 0 0
Sector My Dashboard EDocs	MSP Reporting		
EDocs O			

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

3. 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;

Company O Manage Users O			Q Show
Name/Email Test User testuser@windowbook.com	Roles	Locations All	Active ⊘
Name/Email One User oneuser@windowbook.com	Roles Company User	Locations	Active ©

 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");

MSP 0	
Manage User – Test User – testuser@windowbook.com	
	×
On Active	
Roles and Locations	•
Applications and Service Notification	
Applications	
Authorize the user for the following applications	
On Cores 1	
Service Notification/Use @	
User notification for the following services	
On 3607 Receipt PDF via e-Mail	
On 3607 Receipt PDF via Transfer	
On Finalized Postal Wizard Statement in PDF via Email	
On DAT-PreCheck 2	
On HTML FIN Postage Statement	

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. <u>DAT-PreCheck must</u> 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 Mai.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.



suto validation	Batch Validation	PostalWeb Provision	ning	
Session Folder S	ettings —			
Input folder:	C:\Users\Publi	ic\Documents\Window	Book\wbDPC\AutoImp	ort
Processed folde	C:\Users\Publi	ic\Documents\Window	Book\wbDPC\AutoPro	cessed
Failed folder	CALIsers\Publi	ic\Documents\Window	Rook/whDRC\AutoFail	ed .
	citescisti con	e (o ocumento (o maon		
	File Name	Status	Added	Processed
		Neu-filer: A	Summer in a	
		New files: 0 Failed: 0	Successful: 0 Requested: 0	

### **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).

uto Va	lidation	Batch Validation	PostalWeb Pro	ovisioning	à l			
Gession	Folder Se	ttings						
input f	olden	C:\Users\Public\	Documents\W	indow Boo	k\wbDPC\AutoI	mport	-	
Proces	sed folder	C:\Users\Public\	C:\Users\Public\Documents\Window Book\wbDPC\AutoProcessed					
Failed	folder:	C:\Users\Public\	Documents\W	indow Boo	k\wbDPC\Auto	Failed	6	
			_					
	1	File Name	Status		Added	Processed	1	
$\checkmark$	PKG-FT0	003.zip	Success	7/6/2018	8 2:53:35 PM	7/6/2018 2:54:36 PM		
$\checkmark$	MailDat	_202061.zip	Success	7/6/2018	3 2:53:35 PM	7/6/2018 2:54:37 PM		
$\checkmark$	A lot of	bad data.zip	Success	7/6/2018	8 2:53:35 PM	7/6/2018 2:54:36 PM		
Ċ	7.zip		Sending	7/6/2018	8 2:53:34 PM			
C	5.zip		Sending	7/6/2018	8 2:53:34 PM			
G	3.zip		Sending	7/6/2018	8 2:53:34 PM			
G	1PKG-FT	7003.zip	Sending	7/6/2018	8 2:53:34 PM			
	1MailDa	t_202061.zip	Sending	7/6/2018	8 2:53:34 PM			
C	16.zip		Sending	7/6/2018	8 2:53:34 PM			
	14.zip		Requested	7/6/2018	8 2:53:34 PM	7/6/2018 2:54:36 PM		
C	12.zip		Sending	7/6/2018	8 2:53:34 PM			
G	1 Good.	zip	Sending	7/6/2018	8 2:53:34 PM			
			New files: Failed:	8 0	Successful: 4 Requested: 1			
							Stop	

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 <u>Authorizing Users</u> for more information. Information about the DAT-PreCheck report that gets generated for processed jobs can be found under <u>DAT-PRECHECK REPORT</u> 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:

Auto Validation Batch Validation PostalWeb Provisioning Session Folder Settings Folder: Move to Target Folder Target folder: File Name Last Modified Date File Name Last Modified Date File Name Cast Modified Date	😪 DAT-PreCheck 🍽		
Session Folder   Folder:   Image: Move to Target Folder   Target folder:   Image: Target Folder	Auto Validation Batch Validation PostalWeb	b Provisioning	
Folder:   Move to Target Folder  Target folder  File Name Last Modified Date  File Name Status	Session Folder Settings		
Nove to Target Folder Target folder File Name Last Modified Date File Name File Name Status So <	Folder: 0		
File Name Last Modified Date     File Name Status     Image: status	🙆 🗖 Move to Target Folder		
File Name Status     Image: Status <td>Target folder: 🚺 🔕</td> <td></td> <td></td>	Target folder: 🚺 🔕		
	File Name Last Modified Date	- Fi	ie Name Status
<ul> <li>3</li> <li>3</li> <li>3</li> <li>3</li> <li>3</li> <li>5</li> <li>5</li> <li>5</li> <li>5</li> <li>5</li> </ul>	0		0
<ul> <li>G ↔</li> <li>G ↔</li> </ul>			
<ul> <li>C</li> <li>C&lt;</li></ul>			
		<b>G</b>	
6 🗢			
6		$\bigcirc 0$	
		a h	
		0 🖓	
Selected files:  Successful: 0 Errors: 0 Canceled: 0 Retry	Selected files:  Successful: 0 Errors: 0 Canceled: 0		Retry
Default Home Settings Clear Clear Successful Send		Default Home Settings Clear	Clear Successful Send

Folder <sup>①</sup>: This is a folder, selected by using the corresponding browse folder button <sup>b</sup>, where the Mail.dat files that have <u>not</u> been sent to PW are located. Unless the Folder selected is set as the system default (see call-out <sup>3</sup> 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

CAT-PreCheck **	
Auto Validation Batch Validation PostalWeb Provisioning	
Session Folder Settings	1
Folder: 0	
O Move to Target Folder	
	<b>F</b>
larget folder:	
Ells Massa Last Madified Data	
File Name Last Woomed Date	Pile Ivame Status
0	
× - /	
6	0
	×
<u>a</u> (=	
Ť N	
Selected files:  B Successful: 0	Contraction of the second s
Errors: 0 Canceled: 0	Retry 🕖
Default Hom	e Settings Clear Clear Successful Send
and a state of the second state of the	

• Move to Target Folder : 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 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 <u>not</u> enabled, Mail.dat files that are

successfully sent to PW will remain in the original Folder<sup>1</sup> where they were selected from by the user.

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**

😪 DAT-PreCheck **	
Auto Validation Batch Validation PostalWeb Provisioning	
Session Folder Settings	
Folder: 0	
O Move to Target Folder	
Target folder: 🚯 🔨	<b>2</b>
File Name Last Modified Date	File Name Status
0	Θ
6 🔿	
9 📀	
<b>⊙</b> √-	
Selected files: 10 Successful: 0 Errors: 0 Canceled: 0	Retry
Default Home Sett	ings Clear Clear Successful Send

Target Folder 3: The Target Folder, selected by using the corresponding browse button , is where files that are successfully sent to PW are moved to by the system if the 'Move to Target Folder' option is enabled (checked). Unless the Target Folder selected is set as the system default (refer to call-out 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 ⊟

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

Se DAT-PreCheck **	
Auto Validation Batch Validation PostalWeb Provisioning	
Session Folder Settings	
Folder: 0	
🕑 🗖 Move to Target Folder	
Target folder: 🚹 🔞	<b>S</b>
File Name Last Modified Date	File Name Status
0	Θ
<b>a</b> ->	
<b>Y</b>	
	2
0 🗇	
Selected files:	
Errors: 0 Canceled: 0	Retry
Default Home	Settings Clear Clear Successful Send

Available Files Window <sup>(1)</sup>: This window will display all of the Mail.dat files that exist in the Folder <sup>(1)</sup> 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 to move it from the *Available Files Window* to the *Selected Files Window* (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.

S DAT-PreCheck **	
Auto Validation Batch Validation PostalWeb Provis	sioning
Session Folder Settings	
Folder: 0	
🙆 🗖 Move to Target Folder	
Target folder: 🚹 3	<b></b>
File Name Last Modified Date	File Name Status
0	0
0	$\Rightarrow$
	<b>9</b>
	6
•	· ~-
Calastad films	
Errors: 0 Canceled: 0	Retry
Defau	It Home Settings Clear Clear Successful Send

- Selected Files Window <sup>(5)</sup>: 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.

😪 DAT-PreCheck 🍽	- • •
Auto Validation Batch Validation PostalWeb Provisioning	
Session Folder Settings	j
Folden C:\Users\VMUser.WINDOWBOOK\Desktop\JulyTestFiles	<u> </u>
Move to Target Folder	
Target folder:	<b></b>
File Name Last Modified D *	File Name Status 🐣
CustomAuto_123768 7/6/2015 11:17:2!	1623 - Copy.zip Error

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

rror	0	
Error message:	One or more errors occurred.	
Error message: No records in Mail.dat file for sending		
	ок	

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 2** 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).

🐼 DAT-Pre	Check ™				- • •
Auto Valid	ation Batch Validation	PostalWeb Provi	isioning		
Session Fo	older Settings				i
Folder:	C:\Users\VM	User.WINDOWBO	OK\Desktop\July	TestFiles	
	Move to Target Folder				
Target folder:					
	File Name L	ast Modified D 🔨		File Name	Status 🔺
zip	CustomAuto_123768 7/6	5/2015 11:17:2!	0	DVNO_qaSig.zip	Canceled
zip (	OVNO_qaSig - Copy. 7/8	8/2015 3:41:21		IWCO4433 - Copy.zip	Canceled

### **Component Description & Use**

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

S DAT-PreCheck *		
Auto Validation Batch Validation PostalWeb Provi	isioning	
Session Folder Settings		
Folder: 0		
🙆 🗖 Move to Target Folder		
Target folder: 💦 🔞		<b></b>
File Name Last Modified Date	File Name	Status
0	Θ	
G		
<b>X</b>		
	$\bigcirc 0$	
6	$\langle \mathbf{a}  $	
Selected files: 🚯 Successful: 0		
Errors: 0 Canceled: 0	Retry	0
Defau	ult Home Settings Clear Clear Suc	ccessful Send
Martin and the second sec	nannin U Chann	Second second second second second

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** button is clicked.

Files that were already sent successfully can be sent again by clicking the **Retry** button <sup>2</sup>. Mail.dat files can be sent multiple times, if necessary, no matter what their status is.

• **Right and Left Arrow Buttons (3)**: These arrows are used to move selected files between the *Available Files Window* **(3)** and the *Selected Files Window* **(5)**.

### DAT-PreCheck™ Installation & User Guide

• **Refresh Button 2**: 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**.

R DAT-PreCheck **	
Auto Validation Batch Validation PostalWeb Provisioning	
Session Folder Settings	
Folder: 0	<u> </u>
🙆 🗖 Move to Target Folder	
Target folden 🚺 🔕	<b></b>
File Name Last Modified Date	File Name Status
0	6
0 🛶	
<b>G</b> 🖓	
Selected files:  Successful: 0 Errors: 0 Canceled: 0	Retry
Default Home Se	ttings Clear Successful Send

- Session Counts<sup>1</sup>: 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 <sup>1</sup>2: 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**

🐼 DAT-PreCheck **	
Auto Validation Batch Validation PostalWeb Provisioning	
Session Folder Settings	
Folder: 0	
🙆 🗖 Move to Target Folder	
Target folder: 🚯 🔨	
File Name Last Modified Date File Name	e Status
0 0	
<b>a</b> =>	
$\bigcirc 0$	
<b>Q</b> 🖓	
Selected files:	Y
Errors: 0 Canceled: 0	-0
Default Home Settings Clear Clear	r Successful Send

• **Default Home Settings:** Clicking this button launches the *Batch Settings* screen, within which, the default Folder <sup>1</sup> and Target Folders <sup>2</sup> 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.

Batch Settings	
Folder:	C:\Users\VMUser.WINDOWBOOK\Desktop\JulyTestFiles
	V Move to Target Folder
Target folder	C\Users\VMUser.WINDOWBOOK\Desktop\TargetFolder
	Clear Reset Cancel Save

1

Anytime the 'Browse Settings' screen is accessed during a session and the SAVE button is cilcked 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 <u>not</u> been clicked, the user can click the **Reset** button and <u>all</u> 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 **(D)** can be clicked to revert back to the previously set default for that folder as long as the **Save** button has <u>not</u> 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

Auto Validation Batch Validation PostalWeb Provisioning	
Session Folder Settings	1
Folder: 0	
😢 🗖 Move to Target Folder	
Target folder: 🔂 3	
File Name Last Modified Date File Name	Status
0 0	
<b>6</b> ->	
90	
••••	
Selected files:   Successful: 0  Errors: 0  Canceled: 0  Retry	0
Default Home Settings Clear Suc	ccessful Send

- Clear: Clicking this button clears the Mail.dat files with a status of 'Error' and 'Canceled' from the Selected Files Window<sup>3</sup> and resets the corresponding session counts<sup>3</sup> accordingly.
- **Clear Successful:** Clicking this button clears the Mail.dat files with a status of 'Success' from the *Selected Files Window*<sup>(3)</sup> and resets the corresponding session counts <sup>(3)</sup> accordingly.
- Send/Stop: Clicking this button sends any unsent Mail.dat files displayed in the Selected Files Window<sup>(S)</sup> 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.

ssion	h Holder Settings					
der	CAUsers	VMUser.WINDOWB	00K\Deskt	op\JulyTe	estFiles	
	Move to Tan	pert Rollater				
rget	folder:					1
						_
-	File Name	Last Modified 0			File Name	Status
.zip	CustomAuto_123768	7/6/2015 11:17:2			00001623 - Copy.zip	Sending
.zip	DVNO_qaSig - Copy.	7/8/2015 3:41:21		Ø	00001623.zip	Sending
zip	DVNO_qaSig.zip	7/8/2015 3:41:21		C	07104L01 - Copy.zip	Sending
zip	IWCO4433 - Copy.ziţ	7/6/2015 11:18:1;		C	07104L01.zip	Sending
zip	IWCO4433.zip	7/6/2015 11:18:1:	-		11420-1 - Copy.zip	Sending
zip	OSV1BAR2 - Copy-zij	7/6/2015 11:18:3	P		11420-1.zip	Sending
.zip	OSV1BAR2.zip	7/6/2015 11:18:3	6		CustomAuto_12376870.A	Sending
.zip	O5V1BAR2_12.2 - Cc	6/9/2016 4:20:47	~		CustomAuto_12376870.A	Sending
.zip	O5V1BAR2_12.2.zip	6/9/2016 4:20:47			DVNO_qaSig - Copy.zip	Sending
.zip	R2247863 - Copy.zip	6/7/2016 4:25:17			DVNO_qaSig.zip	Sending
.zip	R2247863.zip	6/7/2016 4:25:17			IWCO4433 - Copy.zip	Sending
	m					•
S	elected files: 18 impres: 0	Successful: 0 Canceled: 0			Retry	

- 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*<sup>®</sup> above for more information on handling files with an "Error" status).

• 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.

R DAT-R	PreCheck **				(		ж
Auto Val	lidation Batch Validat	ion PostalWeb Prov	visioning				
Session	Folder Settings						
Folder:	CAUsers	VMUser.WINDOWBC	OK\Deskt	opUulyTe	stFiles		
	Move to Tan	get Folder					
Target	folder: CAUsers	VMUser,WINDOW80	OOK\Deskt	op\Target	Folder	5	5
	File Name	Last Modified D *			File Name	Status	1
.zip	CustomAuto_123768	7/6/2015 11:17:2		8	00001623 - Copy.zip	Error	
zip	DVNO_qaSig - Copy.	7/8/2015 3:41:21		$\checkmark$	00001623.zip	Success	
.zip	DVNO_qaSig.zip	7/8/2015 3:41:21		۲	07104L01 - Copy.zip	Error	
.zip	IWCO4433 - Copy.ziţ	7/6/2015 11:18:1.	$\Rightarrow$	$\checkmark$	07104L01.zip	Success	
.zip	IWCO4433.zip	7/6/2015 11:18:12	6	8	11420-1 - Copy.zip	Error	
zip	OSV1BAR2 - Copy.zi	7/6/2015 11:18:33		8	11420-1.zip	Error	
zip	OSV1BAR2.zip	7/6/2015 11:18:33	$\langle   $	8	CustomAuto_12376870.A/	Error	
.zip	O5V1BAR2_12.2 - Cc	6/9/2016 4:20:47		8	CustomAuto_12376870.A/	Error	
.zip	OSV1BAR2_12.2.zip	6/9/2016 4:20:47			DVNO_qaSig - Copyzip	Canceled	
.zip	R2247863 - Copy.zip	6/7/2016 4:25:17			DVNO_qaSig.zip	Canceled	
.zip	R2247863.zip	6/7/2016 4:25:17			TWCO4433 - Copy.zip	Canceled	
-						- 14	
S	elected files: 18	Successful: 2 Cancelect: 9			Retry		
						-	
		Defa	ult Home !	Settings	Clear Clear Succes	sful Ser	nd

### Sending A File Via Batch Validation

**D** 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 <u>INSTALLATION</u> 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

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

DAT-PreCheck ™	
Auto Validation Batch Validation PostalWeb Provisioning	
e Session Folder Settings	
Folder: CAUsers\vmuser.WINDOWBOOK\Desktop\CommingleMaildats	
Move to Target Folder	
Target folder:	
File Name Last Modified Date File Name	Status
MS091693.zip 6/21/2016 4:52:54 AM	
M5091701.zip 6/27/2016 8:09:55 PM	
zip	
$\Leftrightarrow$	
Selected files Successful 0	10
Errors: 0 Canceled: 0 Retry	
Default Home Settings Clear Clear Set	ccessful Send

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 <u>not</u> enabled; therefore, a Target Folder is not specified;

😪 DAT-PreCheo	k™	
Auto Validation	Batch Validation	PostalWeb Provisioning
C <sup>Session Folder</sup>	Settings ———	
Folder:	C:\Users\vm	user.WINDOWBOOK\Desktop\CommingleMaildats
	Move to Target F	-older
Target folder:	<b>b</b>	

### 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);

R DAT-PreCheck **	C DAT-PreCheck **
Auto Validation Batch Validation PostalWeb Provisioning	Auto Validation Batch Validation PostalWeb Provisioning
Session Folder Settings	Session Folder Settings
Folder: CAUsers\vmuser.WINDOWBOOK\Desktop\CommingleMaildats	Folder C:\Users\vmuser.WINDOWBOOK\Desktop\CommingleMaildats
Move to Target Folder	Move to Target Folder
Target folder:	Target folden
File Name Status	File Name Last Modified Date File Name Status
zip MS091693.zip 6/21/2016 4:52:54 AM	AS091693.zip 6/21/2016 4:52:54 AM
zip MS091701.zip 6/27/2016 8:09:55 PM	M5091701.zip 6/27/2016 8:09:55 PM
⇒	
<b>~</b>	

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".

😪 DAT-PreCheck ™		🐼 DAT-PreCheck **	•
Auto Validation Batch Validation PostalWeb Provisioning		Auto Validation Batch Validation PostalWeb Provisioning	
- Session Folder Settings		Session Folder Settings	
Folder: CAUsers/vmuser.WINDOWBOOK/Desktop/CommingleMaildats		Folden C:\Users\vmuser.WINDOWBOOK\Desktop\CommingleMaildats	
Move to Target Folder		Move to Target Folder	
Target folden		Target folder:	
File Name         Last Modified Date         File Name           Jop         MS091693.zip         6/21/2016 4:52:54 AM         MS091693.zip	Status Sending	File Name         Last Modified Dates         File Name         Str           MS091701.zip         6/21/2016 4:52:54 AM         MS091693.zip         Succ	atus ess
MS091701.zip 6/27/2016 8:09:35 PM			

### DAT-PreCheck™ Installation & User Guide

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 <u>ENABLE THE SERVICE</u> 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;

DAT-PreCheck <sup>™</sup> Job ID 00013900 Job No. 2017_10NL - Message (HTML)	3		×
File Message Help 🖓 Tell me what you want to do			
E 5 C ↑ ↓ =			
Thu 9/27/2018 1:26 PM			
D do-not-reply@windowbook.com			
DAT-PreCheck <sup>™</sup> Job ID 00013813 Test Job A			
To O Laura Burish			^
00013813-Test Job A-4e233c634808cb0bsep24.pdf			
Your DAT-Precheck Report for Job:00013813 Test Job A 9/24/2018 2:30 pm has completed and is attached.			
Total Count Found: 3			
Total count rows on report: 3			
· · ·			

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**

7. 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;

	<b>V</b>			SEG eD	oc Sender CRID: 121	21212 Company	Name: RO	BERT DORI	RE	
DAT-Pr	e <b>Ch</b>	eck	?en	Mail Cl	ass: Standard Mail	Test Job A	)/24/201	8 2:30 i	om	
alidate Type	CPT ID	MPA ID	NP	NPA	Mail Owner	Mail Owner City, St,	MOCRID	MO MID	Results	Prim ID
PT CRID Validate	1	1	Y	458854	TC WORKS	ZIP+4 CAMBRIDGE, MA	100010		NPA	Value 100010
ail Prepaser					ROBERT DORRE	02139-3781 SHOREWOOD, IL 60404-8195	14350694	_		
PA 458854 is not li	inked to th	e Primary (	RID	- this mail wi	ill NOT qualify for Non-profit s	rates				
PT MID Validate	1	1	N		TC WORKS	CAMBRIDGE, MA 02139-3781	2442173	901264001	Warning	90126400
ail Preparer					ROBERT DORRE	SHOREWOOD, IL	2442172	901264001		
fail Ownet CRID is fail Ownet MID is : Mailing do	the same as the same as DCS 110	as Mail Pre s Mail Prep Of COII	aner b aner b	crid-if you : IID-if you : y with	u me a Mail Service provider, ti ne a Mail Service provider, thi LABELING USPS regulatio	60404-3195 his is an assessable error LIST COMPLL ns: Labeling lit	ANCE st is too o	old.		
fail Owner CRID is fail Owner MID is Mailing de Presort La Scheduled	the same a the same a oes no belin, I Indu	es Mail Prep ot con g List action	npl; Ef Da	<sup>(RID-Ifyon)</sup> <sup>IID-Ifyon</sup> With fective te (CS.	u me a Mail Service provider, 1 LABELING USPS regulatio Date (CSM-11 M-1117): 9/14/.	60404-3195 his is an assessable error LIST COMPLI ns: Labeling fit 89): 8/1/2017 2018	ANCE st is too o	old.		
fail Owner CRID is fail Owner MID is Mailing de Presort La Scheduled IMB MIII	the same at the same at oes no belin, l Indu	as Mail Prep 5 Mail Prep of con g List action	npl; Ef	<sup>(RD-Ifyos:</sup> <sup>ID-Ifyos:</sup> Yective te (CS.	o me a Mail Service provider, th LABELING J USPS regulatio Date (CSM-11 M-1117): 9/14/J IMB V	60404-3195 his is an assessable error LIST COMPLL ns: Labeling fit 89): 8/1/2017 2018 VALIDATIONS	ANCE st is too o	old.		
fail Owner CRID is fail Owner MID is Mailing de Presort La Scheduled IMB MIII	be same a pes no belin, l Indu	as Mail Prep 5 Mail Prep of con g List 1ction	npl Ef	<sup>(RID-11</sup> yoor <sup>IID-11</sup> yoor <sup>IID-11</sup> yoor <sup>IID-11</sup> yoor <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID-11</sup> <sup>IID</sup>	u me a Mail Service provider, fu me a Mail Service provider, fu LABELING J USPS regulatio Date (CSM-11 M-1117): 9/14/J IMB V IMB V	160404-8195 his is an assessable error LIST COMPLL ns: Labeling lif 89): 8/1/2017 2018 VALIDATIONS	ANCE st is too o	old.		
IMB MIII	Des no belin; Indu	as Mail Prep S Mail Prep of con g List action	npl Ef Da	CRID-If you a fID-If you a fective te (CS.	u me a Mail Service provider, the LABELING J USPS regulatio Date (CSM-11 M-1117): 9/14/J IMB V MID Owner City, St, ZIP+4 MID Owner City, St, ZIP+4 MID Owner City, St, ZIP+4	60404-8195 his is an assessable error LIST COMPLL ns: Labeling lit 89): 8/1/2017 2018	ANCE st is too o	pid.		

8. 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 <u>PROVISION THE UTILITY</u> 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 <u>Authorizing Users</u> 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 <u>What is a STID?</u> 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
MAILOWNER	

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

"RESULTS"	Description	Correction Required? <sup>1</sup>
Match	Both MID and CRID identifiers were used in a mail piece, they matched and were found in the PW database.	Ν
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.	Ν
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"

<sup>&</sup>lt;sup>1</sup> 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: YYYYY-ZZZZ Not found in database, requesting data"
- 20. "MPA Publication Number: XXXX, ZIP+4: YYYYY-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,ZZZZ,KKKKK,AAAAA"
- 24. "MPA CRID XXXX is not the same as primary CRID YYYY,ZZZZ,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"

ample:									
Í.			SEG	eDoc Sender CRID: R eDoc Sender CRID:	12121212 Compan 7474747 Compan	y Name: RO y Name: PA	BERT DOR	RE 3 SERVICES	
DAT-PreCheck Mail C DAT-PreCheck Report fo				Class: Standard Mail		0/0//201	0 2 20		
DAI-Pre Validate Type	Chec.	K K MPA ID	NP NPA	Mail Owner	Mail Owner City, St,	9/24/201 MO CRID	8 2:30 j MO MID	DM Results	Prim ID
CPT CRID Validate	1	1	Y 45885	4 TC WORKS	ZIP+4 CAMBRIDGE, MA	100010		NPA	Value 100010
dail Preparer				ROBERT DORRE	02139-3781 SHOREWOOD, IL 60404-8195	14350694			
IPA 458854 is not li IPT MID Validate	inked to the	Primary C 1	RID – this m N	il will NOT qualify for Non-pr TC WORKS	CAMBRIDGE, MA 02139-3781	2442173	901264001	Warning	901264001
dail Preparer				ROBERT DORRE	SHOREWOOD, IL	2442173	901264001		
Presort La Scheduled	belinį Indu	g List ction	Effecti Date (0	ive Date (CSM- ISM-1117): 9/1	-1189): 8/1/2017 24/2018				
IMB MII	DS:			IMB	3 VALIDATIONS	I			
MID	MID	Owner		MID Owner City, St, ZIP+4					
100002	PAC	MAILING	SERVICES	CHARLOTTE, NC 28273-5794					
IMB STL	DS:								
STID STID 222 STAT	Descriptio	n AIL, NO E	MB TRACIN	, NO ADDRESS CORRECTI	ION				

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<sup>®</sup> 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<sup>®</sup> or Basic);
- The address correction service desired (if any); and
- For Informed Visibility<sup>®</sup> 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<sup>™</sup> web site, as well as a table of current STIDs.