



DAT-MAIL™

Installation & Update Guide

Version 4, Created December 7, 2018

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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 page	Revised	Document cover page	Updated cover page to coincide with Window Book's document format template.
Updated sections	Revised	ABOUT THIS GUIDE and throughout	Updated copyright information.
Updated section	Revised	CONTACT INFORMATION	Added link to Support Portal.
Updated sections	Revised	Through document	Replaced hyperlinks for the old User Guides web page with the link to Window Book's Support Portal where the User Guides web page is now located.
Updated section	Revised	PURPOSE	Removed note about upgrading from PSQL to MSSQL and the reference to the Upgrade Guide.
Updates images	Revised	Throughout document	Updated screen images where necessary to correlate with DM version 20.18.09.06 (and newer).
Updates section	Revised	Throughout document	Replaced instances of "By/For Validate" with "DAT-PreCheck".
Updated section	Revised	SYSTEM REQUIREMENTS & PREREQUISITES	Updated link to Window Book Product Requirements.

CHANGE	TYPE	LOCATION IN GUIDE	DETAIL
Updated section	Revision	COMPONENT INSTALLATION SEQUENCE	Added a new product installation scenario and updating existing scenarios to include the Automation Scheduler. Also updated the product installation sequences to include the new scenario.
Updated section	Revision	Component Installation Location & Requirements	Added Automation Scheduler and its' installation location and requirements to the list of components.
Updated section	Revised	DAT-MAIL MS SQL – Installation	Added information about the correlation between selecting the installation type and how the server type gets coded into the “WBInstall.ini” file. Also added information about the “WBProducts.ini” and updating the software between servers and workstations.
Updated section	Revised	DOWNLOAD	Added two “Attention” notes pertaining to 32-bit systems to step 3 of the download process.
Updated section	Revised	INSTALL – SERVER AND STANDALONE TYPES	Added a troubleshooting note to Step 12 of the installation procedure that talks about having to install SQL Server Management Studio separately with MS SQL Server 2017.
Added section	New	G – INSTALL SQL SERVER MANAGEMENT STUDIO	Added section for Clients who are installing MS SQL Server 2017 Express with DAT-MAIL.
Added section	New	Automation Scheduler – Installation	Added section about installing the Automation Scheduler with Auto Postal Updates plug-in.
Updated sections	Revised	Throughout document	Replaced all references to MailDrop Engine (including “MDE”) with PostalWeb Connector (new name as of December 2018).

CHANGE	TYPE	LOCATION IN GUIDE	DETAIL
Updated sections	Revised	Throughout document	Replaced all references to eDM10X with PostalWeb Desktop Dashboard (new name as of December 2018).
Added section	New	ENABLING POSTALONE CUSTOMER DATA	Added section instructing users how to enable DAT-MAIL's PostalOne Customer Data feature.
Updated section	Revised	KEEPING SOFTWARE CURRENT	Revised method for signing up for software notifications to reflect current web site environment.

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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 document is to provide first-time installation instructions pertaining to Window Book's DAT-MAIL MS SQL™ software. Setup and/or configuration instructions that pertain to a first-time installation; as well as, software update instructions are also included.

Other Window Book software components are mentioned in this Guide as they relate to a comprehensive Window Book software system.

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GETTING STARTED

The following sections contain valuable information that the Client (new user) should be aware of before beginning the actual installation of DAT-MAIL, particularly if the Client is intending to install additional software components beyond DAT-MAIL (e.g. Automation Scheduler™, PostalWeb Connector™, PostalWeb Desktop Dashboard™, etc.).

COMPONENT INSTALLATION SEQUENCE

 ***This section of the Guide is intended for new users or the first-time installation of DAT-MAIL.***

There are five different installation scenarios involving DAT-MAIL and the Automation Scheduler along with PostalWeb®, PostalWeb Connector, and PostalWeb Desktop Dashboard:

- A. DAT-MAIL as a standalone system with the Automation Scheduler;
- B. DAT-MAIL as a standalone system with the Automation Scheduler and PostalWeb Connector with the USPS MDR Client;
- C. DAT-MAIL as a standalone system with the Automation Scheduler, PostalWeb Connector with the USPS MDR Client, and PostalWeb;
- D. DAT-MAIL with the Automation Scheduler and the PostalWeb Desktop Dashboard utilizing PostalWeb Connector with the USPS MDR Client; and
- E. DAT-MAIL with the Automation Scheduler, the PostalWeb Desktop Dashboard utilizing PostalWeb Connector with the USPS MDR Client, and PostalWeb.

The installation sequence for the individual components that make up each of these system configurations differs depending on which configuration is being installed. Below is a table that outlines the recommended installation sequences for each (the 'Installation Scenarios' called out in the table below coincide with the list above).

 ***The installation sequences provided are intended for new users only.***

Installation Scenario	PostalWeb	DAT-MAIL (server or standalone)	Automation Scheduler	PostalWeb Connector with MDR Client	PostalWeb Desktop Dashboard	DAT-MAIL ¹ (workstations)
A		1	2			
B		1	2	3		4

¹ Applicable in a server-with-workstation environment, only.

Installation Scenario	PostalWeb	DAT-MAIL (server or standalone)	Automation Scheduler	PostalWeb Connector with MDR Client	PostalWeb Desktop Dashboard	DAT-MAIL ¹ (workstations)
C	1	2	3	4		5
D		1	2	3	4	5
E	1	2	3	4	5	6



Software updates to the various software components mentioned here should be applied in the same sequence used to perform the initial installation. For more information on updating existing software installations, refer to the [KEEPING SOFTWARE CURRENT](#) section in this Guide.

Component Installation Location & Requirements

There are three types of DAT-MAIL installations, depending on the environment it is being installed in:

- **Server:** Intended for the server installation of the software in a server-with-workstation(s) environment;
- **Standalone:** intended for a single installation of the software where the computer it is being installed on acts as the server. There are no workstations with this type of installation; and
- **Workstation:** Intended for the workstation installation in a server-with-workstation(s) environment.

The various software components available as part of the different DAT-MAIL system configurations noted above can be installed on a single computer in a stand-alone environment, or as part of a server with workstation(s) environment (workstations are considered part of the server environment).

If a Client is installing on a single computer in a stand-alone environment, the installation requirements are simple in that all the software components must be installed on the single computer being used, and local drives can be entered for the installation paths.

The installation location and other requirements for a server with workstation(s) environment differ slightly and are documented in the table below.



The information provided below for a server with workstation(s) environment is intended as a quick-reference guide only.

SERVER	WORKSTATION(S)
<p>POSTALWEB (if applicable) – <i>For more information on registering and using a PostalWeb site, refer to the PostalWeb Setup Guides found in the Support Portal on Window Book's web site at: https://windowbook.na2.teamsupport.com/login/user. Registration and/or login is required.</i></p>	
<p>PostalWeb is a web-based component and does not involve a traditional installation on a computer or server. The registration/on-boarding process for a Client's company-specific PostalWeb site should occur on the same computer that PostalWeb Connector resides on; however, for ease-of-use during the required provisioning process.</p> <p>Once a company-specific URL is created and the provisioning process is completed with PostalWeb Connector, a Client's PostalWeb site can be accessed from any computer (server or workstation) for use.</p>	<p>Once a company-specific URL is created and the provisioning process is completed with PostalWeb Connector, a Client's PostalWeb site can be accessed from any computer (server or workstation) for use.</p>
License/Registration:	
<p>A traditional license or registration key is not needed for the registration/on-boarding process; however, a Client will have to have a Postage Statement ID (PSID) to complete the registration process.</p>	N/A
Installation Path:	
<p>Since there is no installation of software on a computer, the requirement(s) for installation paths (local drive or UNC) is not applicable for PostalWeb.</p>	N/A
Software Updates:	
<p>Updates to a Client's PW site are automatic. No action is required by the Client.</p>	N/A

SERVER	WORKSTATION(S)
DAT-MAIL (if applicable) – Refer to the DAT-MAIL – Installation section in this Guide for full installation instructions; as well as, the Keeping Software Current section for more information relating to updating the existing software.	
Install on the server. Select ‘Server’ as the installation type during the installation process.	Install on all workstations. Select ‘Workstation’ as the installation type during the installation process.
License/Registration:	
A registration key is required for the 1st time/new installation - not for software updates.	Server registration carries over to each workstation and does not require the re-entry of the registration key (1 st time/new installs and software updates).
Installation Path:	
During installation, use a local drive for the program installation path and the two data folders. Do NOT use mapped drives.	During installation, use a local drive for the program installation path. <u>All workstations should point to the same data folders as the server installation using UNC path names. Using UNC path names for the two data folders is required.</u> Do NOT use local or mapped drives.
Software Updates:	
Software updates must be downloaded from the Window Book web site and installed on the server. Re-entry of the product registration key is not required.	Once the server software is updated, the next time DAT-MAIL is launched on a workstation, the workstation version will automatically be updated to match the server. Re-entry of the product registration key is not required.
Automation Scheduler – Refer to the Automation Scheduler – Installation section in this Guide for full installation instructions; as well as, the Keeping Software Current section for more information relating to updating the existing software.	
Install on the server.	N/A
License/Registration:	
A registration key is required for the 1st time/new installation - not for software updates.	N/A

SERVER	WORKSTATION(S)
Installation Path:	
A local drive can be used for the installation; a UNC path name is not necessary. Do NOT use a mapped drive.	N/A
Software Updates:	
Software updates must be downloaded from the Window Book web site and installed on the server. Re-entry of the product registration key is not required.	N/A
PostalWeb Connector – For more information regarding the installation of PostalWeb Connector, refer to the PostalWeb Connector - Installation section in this Guide.	
Install on the server.	N/A
License/Registration:	
A Window Book-provided registration key is required for 1 st time/new installation (not for software updates).	N/A
Installation Path:	
A local drive can be used for the installation; a UNC path name is not necessary. Do NOT use a mapped drive. After the installation is complete, UNC paths ARE required for most of the MDR Client folders. Refer to Appendix 1 in the “MailDrop Installation & User Guide” for more information.	N/A
Software Updates:	
Software updates must be downloaded from the Window Book web site and installed on the server. Re-entry of the product registration key is not required.	N/A

SERVER	WORKSTATION(S)
PostalWeb Desktop Dashboard – For more information regarding the installation of PostalWeb Desktop Dashboard, refer to the PostalWeb Desktop Dashboard - Installation section in this Guide.	
Install on the server.	Install on all workstations.
License/Registration:	
A Window Book-provided registration key is required for 1 st time/new installation (not for software updates).	Entry of the registration key must occur on each workstation for the 1 st time install only. Each workstation installation uses the same registration key as the server installation. Re-entry of the registration key is not required for software updates.
Installation Path:	
Use a local drive for the program installation path. UNC path names are not necessary. Do NOT use mapped drives.	Use a local drive for the program installation path. UNC path names are not necessary. Do NOT use mapped drives.
Software Updates:	
Software updates must be downloaded from the Window Book web site and installed on the server. Re-entry of the product registration key is not required. Update the PostalWeb Connector software before updating PostalWeb Desktop Dashboard.	Software updates must be downloaded from the Window Book web site and installed on each workstation. Re-entry of the product registration key is not required. Before updating any of the workstations, make sure the most current version of PostalWeb Connector has been installed on the server.

SYSTEM REQUIREMENTS & PREREQUISITES

Click the following link to obtain important Prerequisite and Requirements information for Window Book products, along with important information about System Setup; Firewall Settings; Database Maintenance; General Resource information; Troubleshooting; and FAQs.

http://help.windowbook.com/help/WindowBook_Product_Requirements/Static/default.htm#welcome



Real-time backup systems should exclude DAT-MAIL's 'MD**' databases to avoid database locking situations with automated processing.**

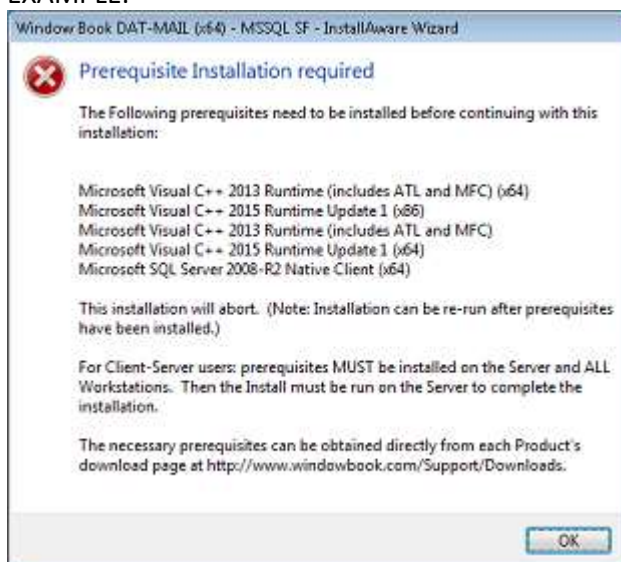
Software Prerequisites

As of March 2016, new software prerequisites for installing DAT-MAIL, PostalWeb Connector, and PostalWeb Desktop Dashboard have been implemented. The preferred reference for these prerequisites is located on each of the software's Downloads pages on the Window Book web site at:

<http://www.windowbook.com/Support/Downloads>.

The prerequisites must be installed prior to the installation of DAT-MAIL; however, if they are not, a prerequisites dialog will display at the start of the installation. The dialog will identify exactly which of the prerequisites are missing and will provide the location the missing prerequisites can be obtained from.

EXAMPLE:



i *The Prerequisites dialog contains information specific to the system the Client is attempting to install DAT-MAIL on. The above screen image is being used as an example only.*

Clicking **OK** will close the dialog and abort the DAT-MAIL installation. Download and install the missing prerequisites and begin the DAT-MAIL installation again.

i *Meeting the prerequisite requirements for DAT-MAIL will also satisfy the same prerequisite requirements for any of the other Window Book software components that may or may not be being installed after DAT-MAIL. Remember – if additional Window Book software components are to be installed, DAT-MAIL should always be installed first (with the exception of PostalWeb, which is Internet-based). Refer to the [COMPONENT INSTALLATION SEQUENCE](#) section in this Guide for further clarification.*

Service Log On Credential Permissions

DAT-MAIL installs and uses a service called the “Window Book DAT-MAIL Database service”. This service is specific to DAT-MAIL and requires a service-specific logon, separate from AWAM (if AWAM is being used) to insure proper functionality. In addition, the Window Book DAT-MAIL Database service logon credentials require special permissions pertaining to MS SQL database usage. These necessary permissions are outlined in the following document:

http://help.windowbook.com/help/WindowBook_Product_Requirements/Static/default.htm#welcome



The Window Book DAT-MAIL Database service logon credentials should be created prior to the installation of DAT-MAIL, and the user performing the installation will need to have the credentials on-hand at the time of installation (server and standalone installation types).

Additional Requirements for Submitting Files to PostalOne!

The MDR Client is a USPS® supplied program used with PostalWeb Connector to communicate to *PostalOne!*. It can require a significant amount of memory, especially if a mailer has jobs of 5 million pieces or more, or if they are going to validate and upload multiple files at the same time, which PostalWeb Connector has the ability to do. Below is a table of the recommended memory allocations when using PostalWeb Connector:

Largest Job (in number of pieces)	Free memory required by the MDR Client
500,000	2 GB
2,000,000	3 GB (64-bit OS required)
5,000,000	4 GB (64-bit OS required)
10,000,000	5 GB (64-bit OS required)
More than 10 million	Contact Window Book Support

Servers or computers utilizing PostalWeb Connector with the MDR Client software for the transmission of files to *PostalOne!*® are recommended to be 64-bit systems with an additional 2 GB to 4GB of RAM (minimum) available for this function alone.

The File Transfer software (Manual mode for uploading to *PostalOne!*) uses http/https protocol to communicate through ports 80 and 443. The destination address is mdx.usps.com which corresponds to a virtual IP which is accessible to the internet and redirects to servers to a USPS secure enclave in a data center in Eagan MN. If firewall settings prevent http/https communication through ports 80 and 443, reconfigure the firewall to allow this traffic. Port 443 is the standard port for https communication. The *PostalOne!* Mail.dat® client software can be configured to work through a proxy server when needed.



The information provided above about the necessary ports and firewall settings for the MDR Client software is taken directly from the Postal Service Mail.dat® Technical Specification, which can be downloaded from the USPS® web site at: <https://www.usps.com/postalone/guides.htm>.

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COMPONENT INSTALLATION

This section provides information regarding the installation DAT-MAIL, along with information pertaining to other available components identified in the [COMPONENT INSTALLATION SEQUENCE](#) section of this Guide. The full installation procedure for DAT-MAIL is provided. For components other than DAT-MAIL, pertinent information pertaining to each component installation, along with hyperlinked locations to full installation instructions are provided.

PostalWeb - Registration

PostalWeb is a web-based service from Window Book. It provides Mail Service Providers (MSPs) and Mail Owners (MOs) a unique view of their successful and failed *PostalOne!* submissions for each of their CRID-specific locations via a company-specific, web-based URL. Accessible via computers, tablets, and mobile applications, PostalWeb works in conjunction with PostalWeb Desktop Dashboard, PostalWeb Connector, and DAT-MAIL providing valuable tools to increase productivity and add savings. With PostalWeb, a mailer's statements and confirmation pages can be delivered to them in PDF and/or XML file formats. Additional utilities that work with PostalWeb, such as DAT-PreCheck™ and Your-Score™ intend to help mailers improve their quality control and build defenses against assessments for full service and seamless scorecard errors.



For more information about PostalWeb, refer to the PostalWeb Guides that are available for download from the Support Portal on Window Book's web site at:
<https://windowbook.na2.teamsupport.com/login/user>. Registration and/or login is required.

Using PW requires registering/creating a company-specific URL or PW site. This process falls under the 'Installation Scenarios' B and D documented in the [COMPONENT INSTALLATION SEQUENCE](#) section in this Guide. If a Client intends to use PW along with DAT-MAIL, the registration/creation of their company-specific PW site should be the first step in the installation process.



For instructions on how to register/create a company-specific PW site, refer to a PostalWeb Setup Guide, which is available for download from the Support Portal on Window Book's web site at:
<https://windowbook.na2.teamsupport.com/login/user>. Registration and/or login is required.

DAT-MAIL – Installation



Window Book's DAT-MAIL software must be loaded onto the same computer or server where PostalWeb Connector with the USPS MDR Client Software is to be installed; as well as on all workstations (refer to the [Component Installation Location & Requirements](#) section in this Guide).

As stated earlier, there are three types of DAT-MAIL installations, depending on the environment it is being installed in:

- **Server:** Intended for the server installation of the software in a server-with-workstation(s) environment. Server installations must be performed before any Workstation installations;
- **Standalone:** intended for a single installation of the software where the computer it is being installed on acts as the server. There are no workstations with this type of installation; and
- **Workstation:** Intended for the workstation installation in a server-with-workstation(s) environment. Workstation installations must occur after the Server installation.

The installation wizard for DAT-MAIL prompts the user to select which type should be installed. The type selected will be coded into the "WBInstall.ini" file:

- DM707Netversion=SERVER (for a Server installation type);
- DM707Netversion=ST (for a Standalone installation type); and
- DM707Netversion=W (for a Workstation installation type).

```
WBInstall - Notepad
File Edit Format View Help
[windowbook]
DM707Netversion=SERVER
MDB707Datapath=C:\WB\MDV\Data
MDB707path=C:\WB\MDV\datmail707.exe
PM707Datapath=C:\WB\PMW\Data
PM707path=C:\WB\PMW\postmaster707.exe
Dropship707Path=C:\WB\Dropship\DropshipIt707.exe
Tools707=C:\WB\Calcs
Tools707Data=C:\WB\Calcs\Data
Bookshelf=C:\WB
NetBookshelf=C:\WB
AWAMFMPPath=C:\WB\IPS\AWAMFM
AWAMFMPProgPath=C:\WB\MDV\MDIMPCC707.exe
AWAMData=C:\WB\MDV\Data
PrivateDir=C:\wbpriv
CommMgr707ProgPath=C:\WB\Calcs\wb1commmgr707.exe
CommMgr707Data=C:\WB\Calcs\Data
ScaleMgr707ProgPath=C:\WB\Calcs\Scalemgr707.exe
DSDD=3
DMType=MSSQL
EDMPPath=C:\Program Files\window Book\edocsManager
[DoNotDisplay]
StatementGenerationComplete=0
```

For Server installation types, a file called “WBIproducts.ini” is also created, which tells the workstation(s) whether it needs to be updated. It contains the version number of DAT-MAIL that has been updated by the Server installation. It also has a list of files (i.e. programs) to check as being open on the workstation. If it finds any of these programs running, a warning or error message will display on the workstation (when an update is required).



```

[DAT-MAIL]
Version=20.15.11.15
Installer=Install\UpdateDatMail.bat
ManualInstall=0
ActiveServerInstall=0
ServerPath=C:\WB

EXEF11es=25
File1=MDARC707.exe
File2=MDBM3EX707.exe
File3=MDFA707.exe
File4=MDLCKMGR707.exe
File5=MDMRG707.exe
File6=MDPL707.exe
File7=MDSCAN707.exe
File8=MDWT707.exe
File9=WBIServiceManager707.exe
File10=SPUTIL707.exe
File11=PMWiz707.exe
File12=pmwRPT707.exe
File13=pmAsnEmdSvc707.exe
File14=pmFUTIL707.exe
File15=pmwUP707.exe
File16=pmwIE707.exe
File17=pmwPB707.exe
File18=pwPRG707.exe
File19=pwSVC707.exe
File20=PMMDCMSTATUS707.exe
File21=WBREXPORTAPSV707.exe
File22=WBIRIMPREFERENCE707.exe

Display1=DAT-MAIL Archiver
Display2=DAT-MAIL Multi-Job Postage Data Feed
Display3=DAT-MAIL FAST Updated Utility
Display4=DAT-MAIL Locked Job Manager
Display5=DAT-MAIL Merge Process
Display6=DAT-MAIL Palletization
Display7=Batch Barcode Scanning
Display8=DAT-MAIL workTickets
Display9=Window Book Service Manager
Display10=DAT-MAIL Spoilage Tracking
Display11=Spreadsheet and Report Generator
Display12=Reports
Display13=ASN/EMD FTP Service
Display14=Statement File utilities
Display15=Window Book File Conversion Program
Display16=Import/Export Utility
Display17=Print Block Utility
Display18=Accounting Purge Utility
Display19=Statement Printing Service
Display20=PMMDCMSTATUS707.exe
Display21=Broadridge Export Service
Display22=Broadridge Import Reference Service
File23=MDIMPSEVER707.exe
File24=MDIMPCC707.exe
File25=wbAWAMFM.exe
File26=MDIMPDAEMON707.exe
Display23=WAM (or AwAM)
Display24=WAM (or AwAM)
Display25=AwAM File Manager
Display26=Mail.dat Import Daemon
  
```



If the “ManualInstall” parameter in the “WBIproducts.ini” file is set to =1 (it is set to =0 in the image above), then a full workstation install using the installer is required on each workstation

(maybe necessary in rare cases). This pertains to software updates only and not the initial workstation installation.



If a server installation is in progress (i.e. software update), the “ActualServerinstall” parameter in the “WBIproducts.ini” file will be set to =1. During this time, the workstation will not be able to run (Error message “Server installation in progress” will display).

The installation wizard also installs the Window Book DAT-MAIL Database service. This service is specific to DAT-MAIL and requires further action by the user, after the installation completes. An installation wizard screen will be displayed towards the end of the installation process that provides instructions on what further action is required by the user. This same information is also included in the download and installation procedure provided here.

The steps involved with downloading and installing DAT-MAIL are as follows and should be performed in this order, depending on the installation type selected (i.e. Server, Standalone, or Workstation):

- A. [Download and install the software](#) (including any necessary prerequisites – install prerequisites, first);
 - i. Do NOT re-start the server/computer if prompted to do so by the installation wizard – proceed to steps B and C below, first;
- B. [Enter logon credentials for the DAT-MAIL service](#), and start the service (server and stand-alone installation types only – not required for workstation installations);
- C. [Create a data backup directory](#) (only necessary if the DAT-MAIL data and the MS SQL data reside on different or separate servers);
- D. [Restart the server/computer](#) (if prompted by the DAT-MAIL installation wizard);
- E. [Share over the network](#) (pertains to the server in a server with workstation(s) environment only));
- F. [Register the DAT-MAIL software](#) (server and stand-alone installation types only – not required for workstation installations); and
- G. [Install the SQL Server Management Studio](#) (if Microsoft SQL Server 2017 Express was installed).

A – DOWNLOAD AND INSTALL THE SOFTWARE

The installation of the DAT-MAIL software documented is broken into two procedures: 1) Server and Standalone types; and 2) Workstations. Before the installation of the software can begin; however, it must be downloaded from the Window Book web site. Proceed to [DOWNLOAD](#) to continue.

DOWNLOAD

To download and install the most recent release of Window Book's DAT-MAIL software, perform the following:

1. Go to Window Book's website at www.windowbook.com, and click on the 'Downloads' menu item;



2. The Software Downloads page will display. Scroll down and click the DAT-MAIL MS SQL™ link;



i The version information for DAT-MAIL MS SQL depicted in the screen images found in this Guide was current at the time of publishing; however, version information is subject to change as new product releases occur. Window Book's web site may not reflect the version number displayed in this Installation & Update Guide.

- The DAT-MAIL MS SQL™ Software Update [version] page will display. Depending on the system you are running, select the appropriate Download DAT-MAIL™ (64-bit or 32-bit) and click the corresponding button to begin the download;



Window Book will be sunsetting support for current 32-bit installations by July 30, 2019.



As of July 2018, new installs and server moves will only be performed on 64-bit operating systems.

Software Prerequisites

DAT-MAIL™ requires Microsoft® .NET Framework 4.5.2 as a prerequisite.

Please see the following prerequisite resources:

Requirements:

- Windows 7 SP1
- Microsoft .NET Framework version 4.5.2
- 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 2012 Native Client (32-bit (x86) version)
- Microsoft SQL Server Management Studio 2017 (SSMS)

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

[Learn More about DAT-MAIL](#)

[Learn More about DAT-MAIL Network Auto-Update System](#)

New Demo/Trial Customers

Please Contact Window Book Support for a 30-day trial of the software

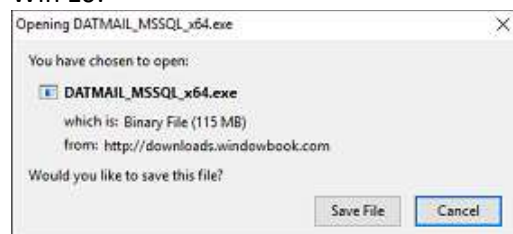
*Installation and set-up of new or updated software releases is NOT a function or service of our Technical Support team.

Latest DAT-MAIL™ MS-SQL Product Version

[Download DAT-MAIL™ \(64-bit\)](#) [Download DAT-MAIL™ \(32-bit\)](#)

- After clicking the appropriate download button, click the **Save File** or **Save** button on the resulting dialog;

Win 10:



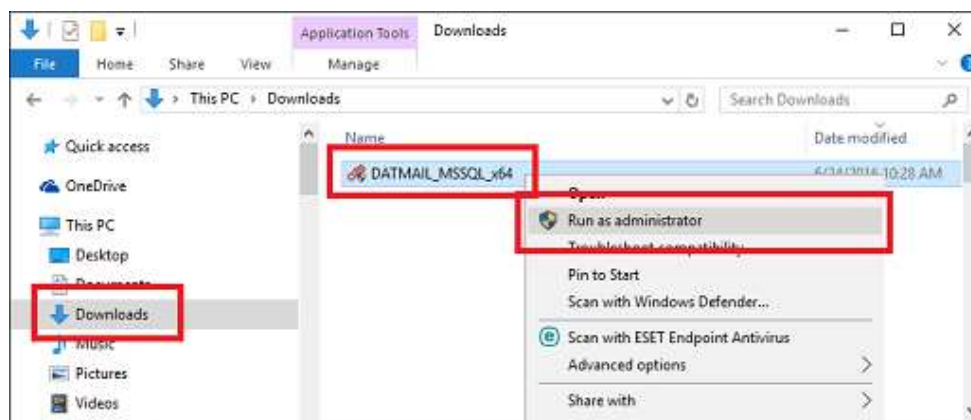
Win 7:



5. When the download completes, either...

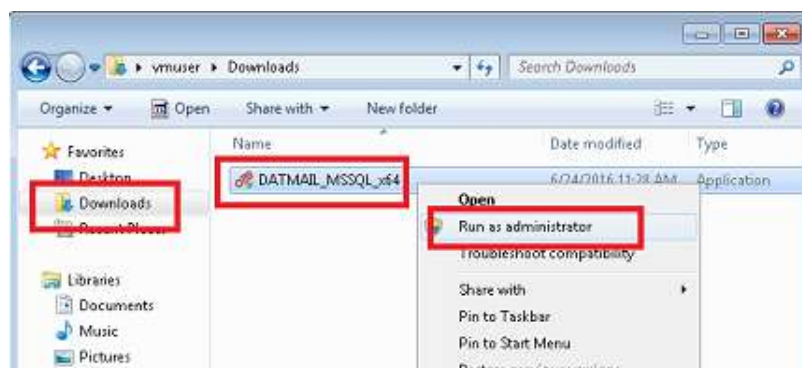
Win 10:

... navigate to the Downloads folder on the server, right-click on the downloaded file, and select 'Run as administrator', or...

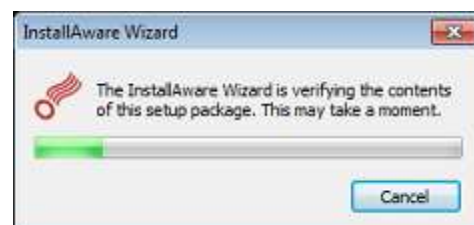


Win 7:

...click the **Open Folder** button, right-click on the downloaded file, and select 'Run as administrator';

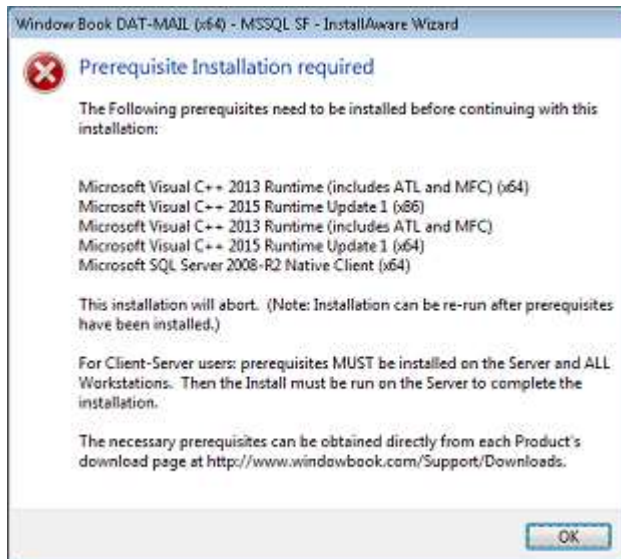


6. The InstallAware Wizard will begin verifying the contents of the setup package;





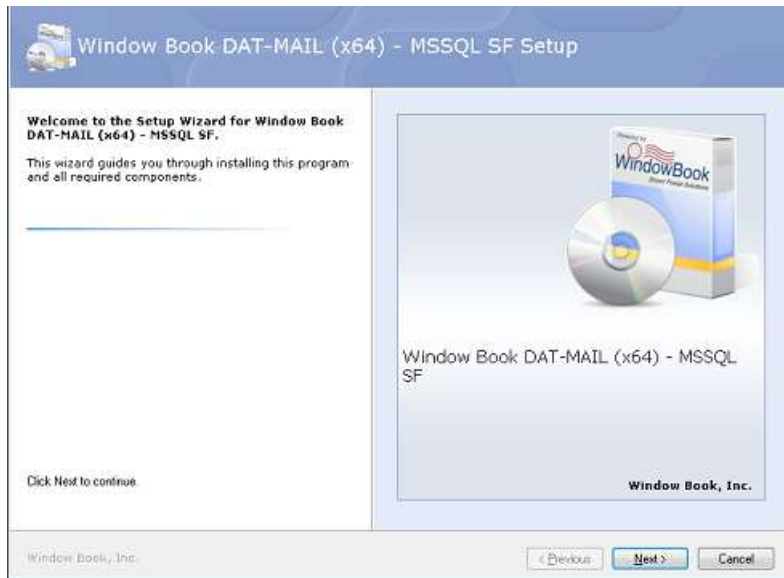
If a Prerequisites dialog displays, there are software prerequisites missing from the server or computer DAT-MAIL MS SQL is being installed on (refer to the [SYSTEM REQUIREMENTS & PREREQUISITES](#) section in this Guide for more information). The dialog will identify which of the prerequisites are missing, and will provide the location where the missing prerequisites can be obtained from. Clicking the OK button will close the dialog and abort the DAT-MAIL MS SQL installation. Download and install the missing prerequisites. After the all of the necessary prerequisites are installed, begin the DAT-MAIL MS SQL installation again by right-clicking on the downloaded DAT-MAIL MS SQL file and selecting 'Run as administrator' (refer to step 5 above).

EXAMPLE:

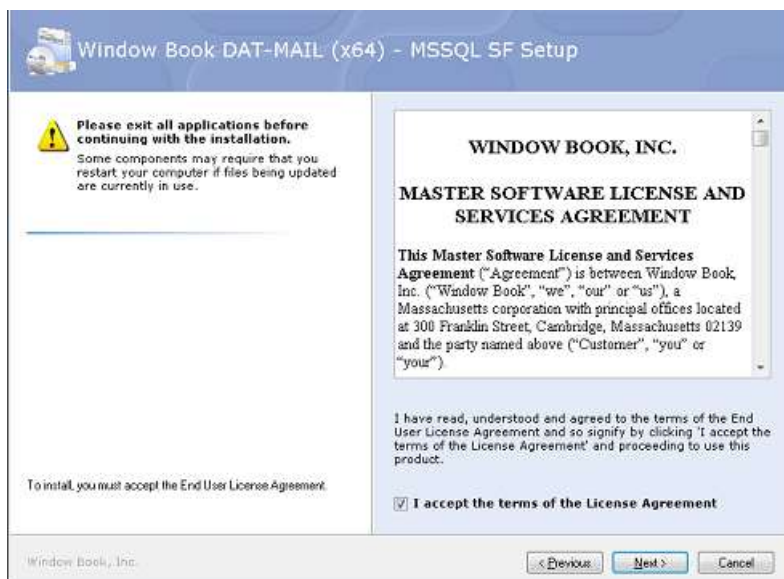
INSTALL – SERVER AND STANDALONE TYPES

To install the DAT-MAIL software for 'Server' or 'Standalone' installation types (not Workstations), perform the following (assuming all the prerequisites have been installed):

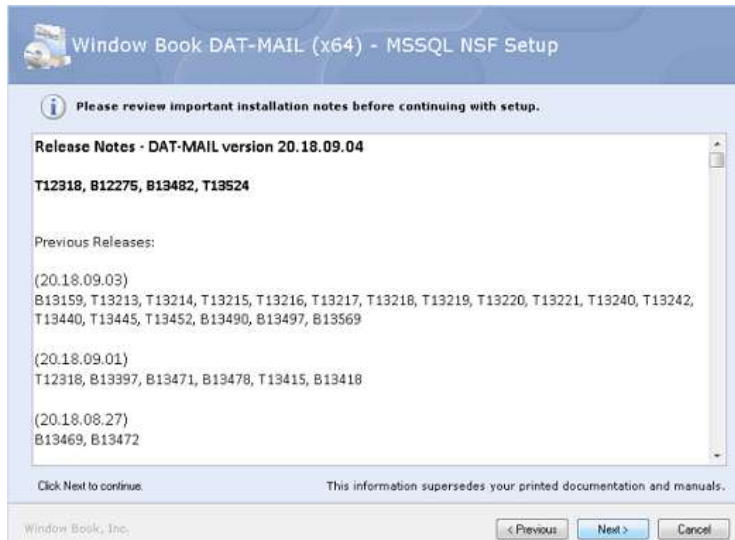
1. If/when all of the prerequisite requirements have been met, right-click on the downloaded DAT-MAIL installation file and select 'Run as administrator' (refer to step 5 in the [DOWNLOAD](#) procedure above);
2. After verifying the contents of the setup package, the installation wizard's welcome screen will display. Click the **Next** button to continue;



3. The next screen will direct you to exit all applications before continuing. Select (check) the option 'I accept the terms of the License Agreement'; and click the **Next** button to continue:



- The next screen will recommend reviewing the important installation notes. After reviewing, click the **Next** button to continue;



- The *Installation Options* screen will display. Choose the type of installation that should occur: Standalone (single install environment); Server (server with workstation(s) environment);

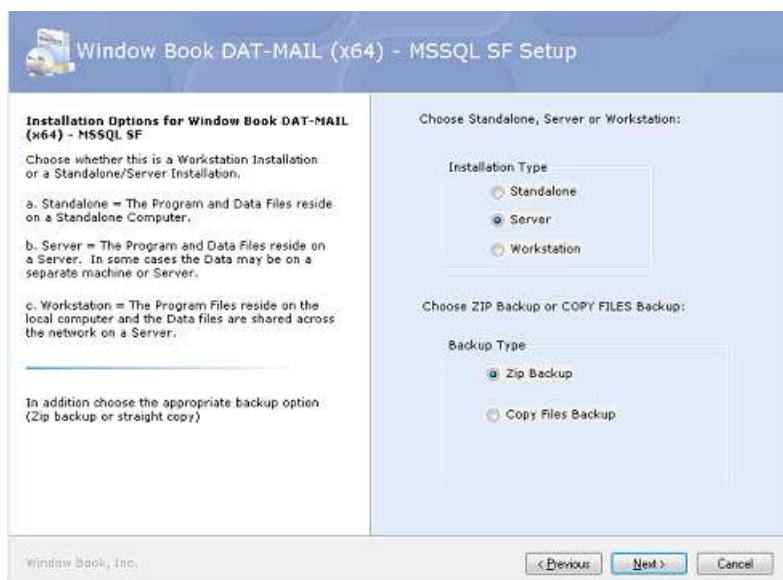


Do NOT select 'Workstation' for this procedure. Installation instructions for Workstations can be found at [INSTALL – WORKSTATION TYPE](#).

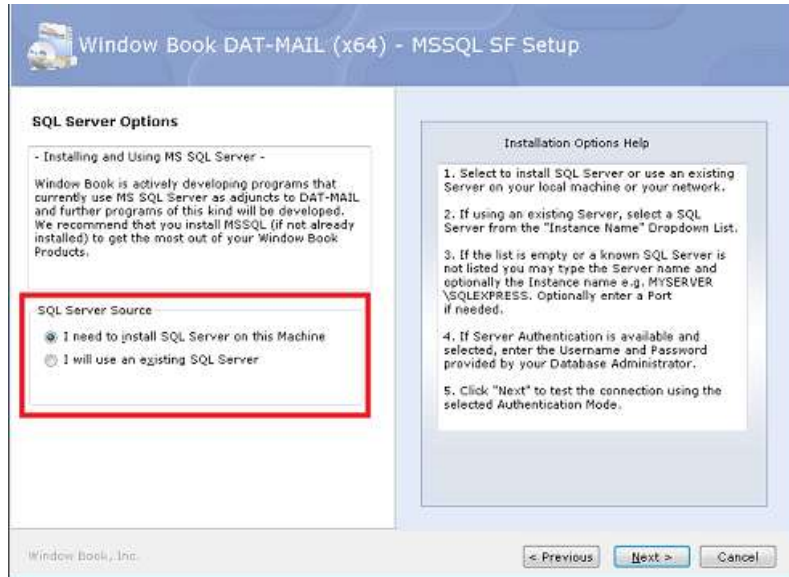


In a server with workstation(s) environment, the server installation should always be performed before any workstations.

Also, select which type of backup you'd prefer: 'Zip Backup'; or 'Copy Files Backup'. In the example being used here, the 'Server' option is selected. Click the **Next** button to continue;



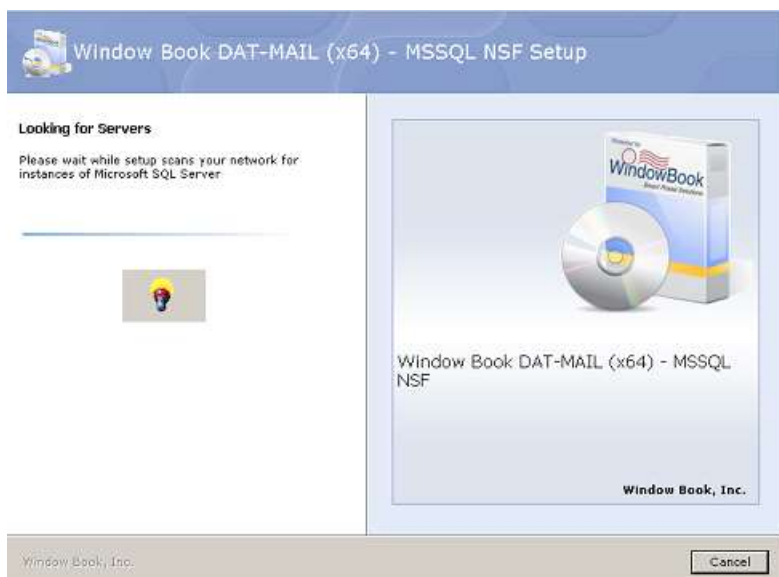
6. The *SQL Server Options* screen will display (server and standalone installation types only). Select one of the following:
- **‘I need to install SQL Server on this Machine’:** Choose this option to install Microsoft SQL Server on the machine; and
 - **‘I will use an existing SQL Server’:** Choose this option to use an existing instance of SQL Server.



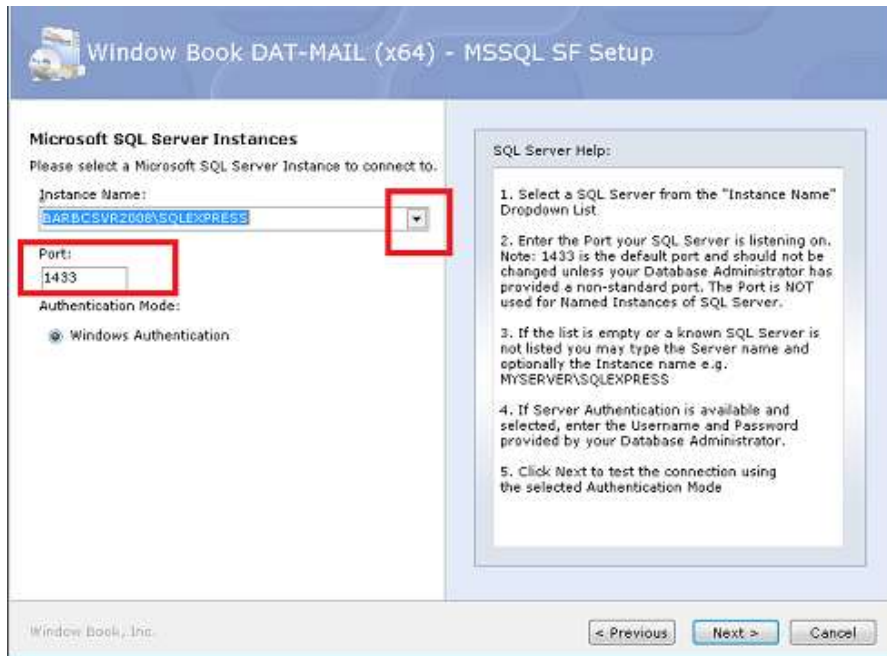
If the option ‘I need to install SQL Server on this Machine’ is selected, click the **Next** button to continue and proceed to Step 9 below;

If the option ‘I will use an existing SQL Server’ is selected, click the **Next** button to continue;

7. The *Looking for Servers* screen will display;



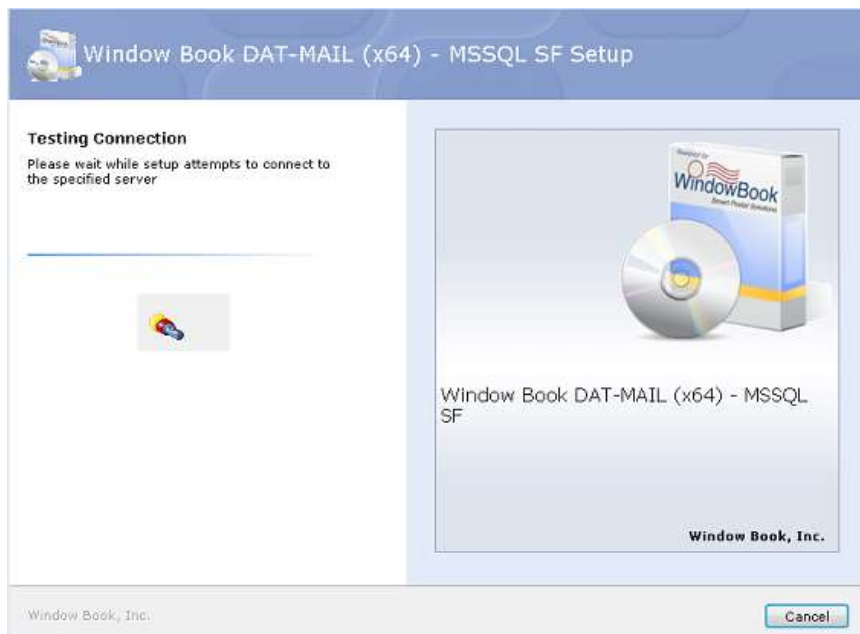
When all the available server instances are found, the *Microsoft SQL Server Instances* screen will display. Click the drop-down arrow and select the existing SQL Server instance from the list. Make sure the correct port is entered.



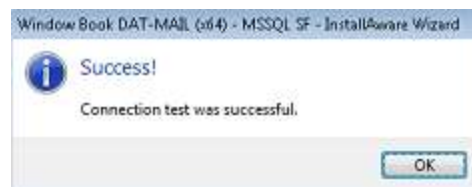
Contact a local IT administrator for information on which port to use if the default port (i.e. 1433) cannot be used.

Click the **Next** button to continue;

8. The *Testing Connection* screen will display;



If the connection was successful, a *Successful* dialog will display. Click **OK** to resolve the dialog and automatically proceed to the next screen;

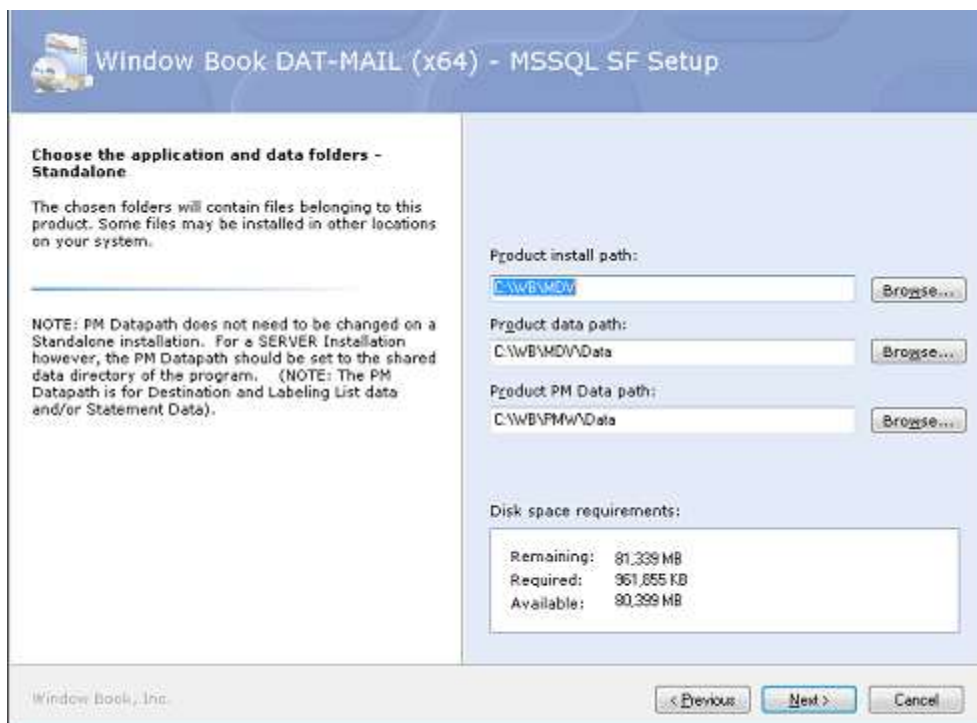


If the connection was *not* successful, an *Error* dialog will display. Click the **Retry** button to return to the *SQL Server Options* screen (refer to Step 6 above) and begin the process again, or click the **Cancel** button to cancel the DAT-MAIL installation in its entirety;



9. Choose the install file paths for the DAT-MAIL product install path and the product data paths.

Window Book recommends using the default locations provided (see screen image below); however, in some server installation instances Clients request that one or both Data folders (MDV and PMW) be located on a different drive (one example would be if there are restrictions due to drive size).



To change the path for the Data folders, click the corresponding **Browse...** button and select the appropriate location (e.g. 'D:\'). The InstallAware program will automatically create the 'WB'

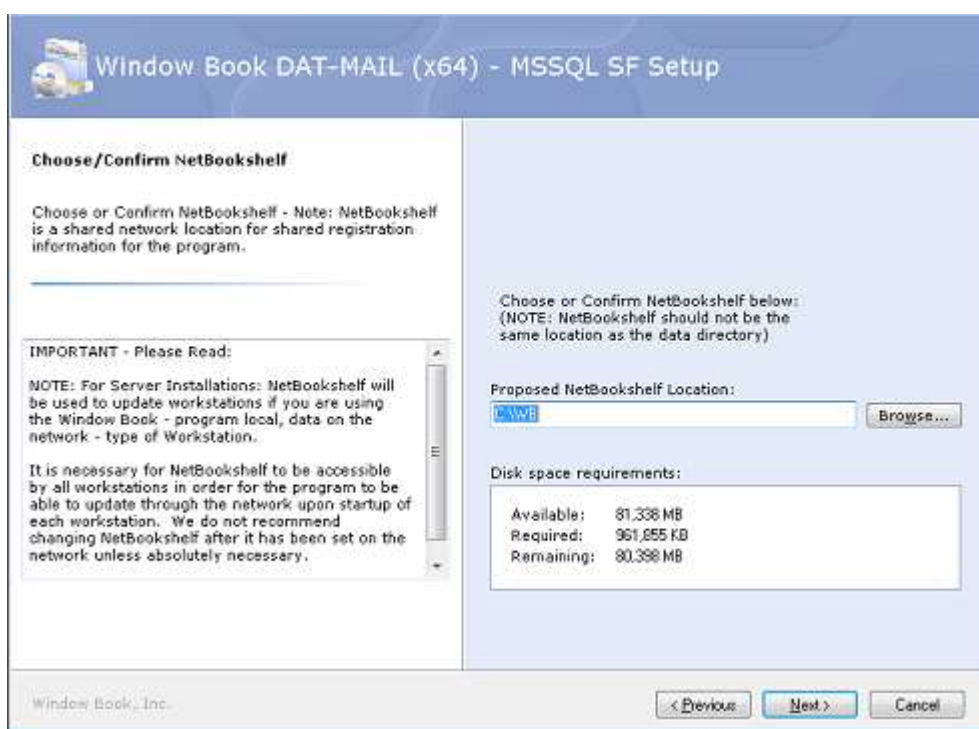
parent folder on the newly selected drive to create the Data folder(s) under (Example: If the 'D:\' drive is selected for the 'Product PM Data Path', the InstallAware Wizard would show the path as 'D:\WB\PMW\Data');



In a server with workstation(s) environment, if one or more of the data folders is to be located on a drive other than 'C:\' (default), make sure to share the Data folders as well as the Product folder or problems with data transfers will occur (refer to the [E – SHARE OVER THE NETWORK](#) section in this Guide).

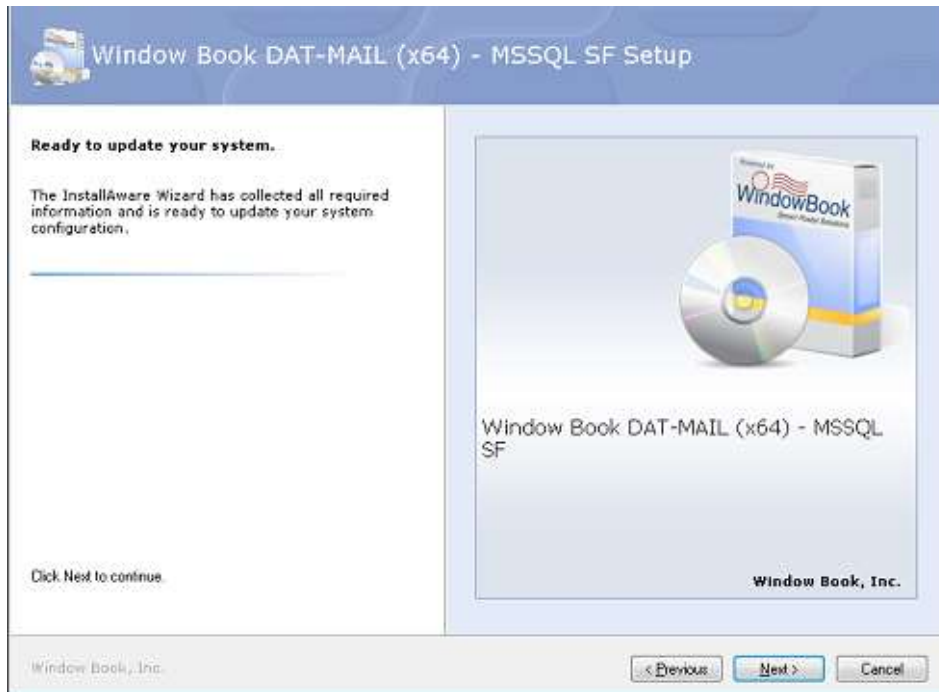
Click the **Next** button to continue;

10. The *Choose/Confirm NetBookshelf* screen will display. Window Book strongly recommends using the default location provided for NetBookshelf;



Click the **Next** button to continue;

11. The *Ready to update your system* screen will display. Click the **Next** button to continue;



12. If the option 'I will use an existing SQL Server' was selected during the installation (refer to [step 6](#) above), the installation of DAT-MAIL will begin. Proceed to [step 13](#) below.

If the option 'I need to install SQL Server on this machine' was selected during the installation (refer to [step 6](#) above), the *Microsoft SQL Server [version number] Setup* screen will display. The version of Microsoft SQL Server the DAT-MAIL installer installs is dependent on the operating system of the machine it is being installed on. If the software is being installed on a Win 7 machine, Microsoft SQL Server 2014 Express R2 will be installed. If the software is being installed on a Win 10 machine or machines running a supported Windows Server operating system, MS SQL Server 2017 Express will be installed.



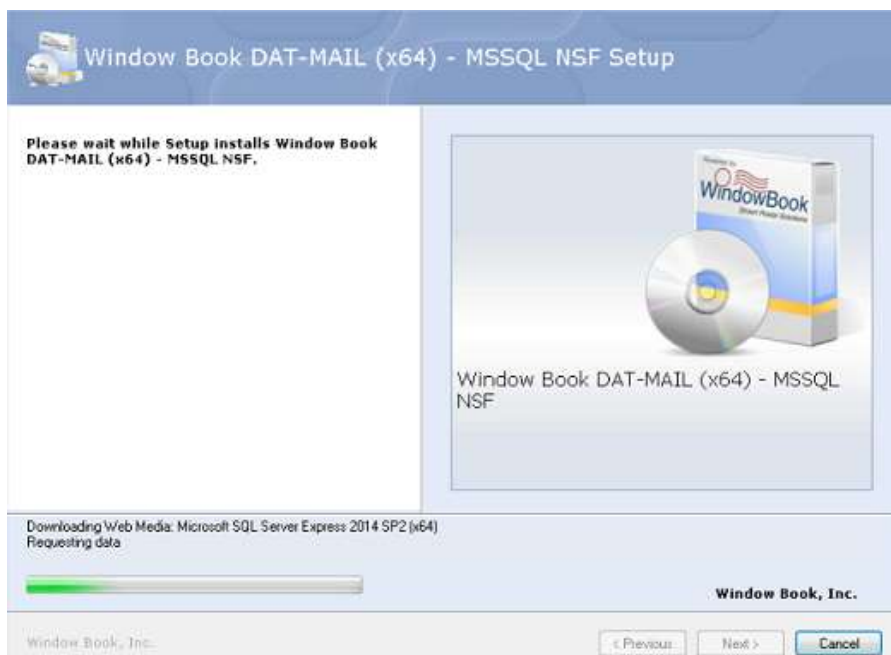
With MS SQL Server 2016 and newer, Microsoft no longer packages the SQL Server Management Studio along with MS SQL Server; therefore, it is no longer automatically installed with MS SQL Server 2017 Express. Users will have to manually install the SQL Server Management Studio separately on the computer or server where MS SQL Server 2017 is installed after the installation of DAT-MAIL is complete. A link to download the SQL Server Management Studio is available on DAT-MAIL's software download page at:

<https://www.windowbook.com/Support/Downloads/DAT-MAIL>.

Window Book strongly recommends using the default folders/paths provided for the installation of SQL. Click the **Next** button to continue;



13. The setup and installation of MS SQL and DAT-MAIL will begin, along with the installation of the Window Book DAT-MAIL Database service;



The installation will take a few minutes – more so if Microsoft SQL Server Express is also being installed. The process completes with the installation of the Window Book DAT-MAIL Database

service. When finished, a confirmation dialog will display. Click the **OK** button to close the dialog and continue;



14. The *DAT-MAIL Database Server – Information* screen will display. The screen contains instructions for entering the appropriate service-specific log on credentials; as well as, link information on where to view the SQL permissions the log on credentials require.

 ***This same information is provided in the [B – ENTER THE SERVICE LOGON CREDENTIALS](#) section in this Guide.***

Click the **OK** button to close the screen and complete the installation of DAT-MAIL.





*In some instances, the server DAT-MAIL has been installed on will require a re-boot or re-start for certain changes to take effect. If this is the case, a dialog will display after the confirmation screen instructing the user to reboot or restart the server. **Make sure to complete steps [B – ENTER THE SERVICE LOGON CREDENTIALS](#) and [C – CREATE A DATA BACKUP DIRECTORY](#) (server and standalone installation types only) BEFORE re-booting the server.***

The installation of DAT-MAIL (Standalone or Server type) is complete! Proceed to [B – ENTER THE SERVICE LOGON CREDENTIALS](#).

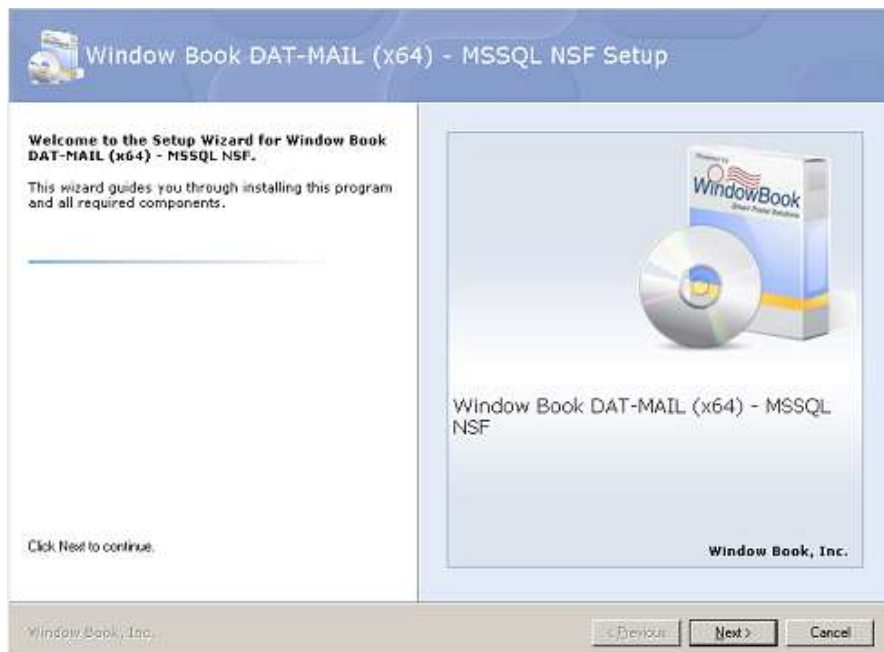
INSTALL – WORKSTATION TYPE



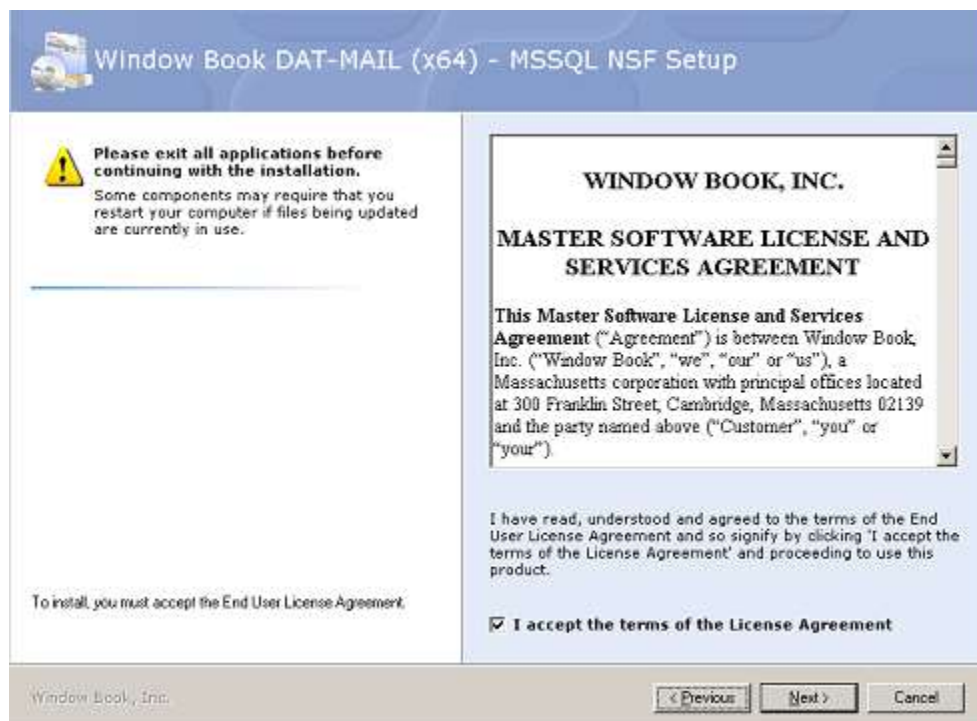
*Installation of the DAT-MAIL software on a workstation(s) should **not** occur until the server installation is completed, including performing the configurations documented under [BASIC SETUP FOR USE](#). This means that all server components (i.e. PostalWeb Connector and PostalWeb Desktop Dashboard – if applicable) should also be installed on the server, before installing DAT-MAIL on a workstation(s) – refer to [COMPONENT INSTALLATION SEQUENCE](#) for more information).*

To install the DAT-MAIL software for a 'Workstation' installation type (not Standalone or Server), perform the following (assuming all the prerequisites have been installed – refer to [DOWNLOAD](#) above):

1. If/when all the prerequisite requirements have been met and the verification is complete, right-click on the downloaded DAT-MAIL installation file and select 'Run as administrator' (refer to step 5 in the [DOWNLOAD](#) procedure above);
2. After verifying the contents of the setup package, the installation wizard's welcome screen will display. Click the **Next** button to continue;



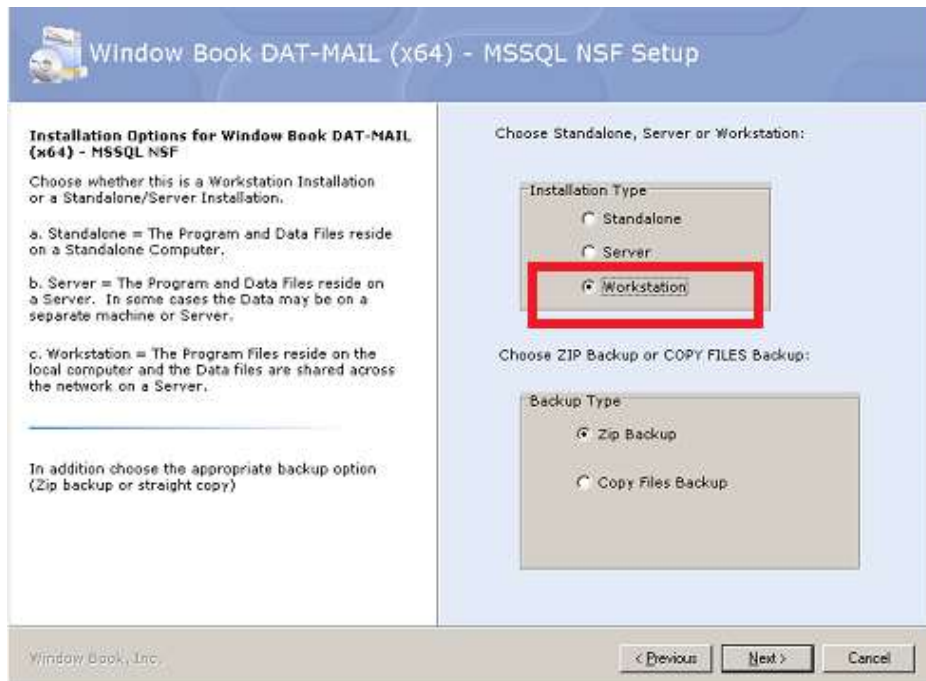
- The next screen will direct you to exit all applications before continuing. Select (check) the option 'I accept the terms of the License Agreement'; and click the **Next** button to continue:



- The next screen will recommend reviewing the important installation notes. After reviewing, click the **Next** button to continue;



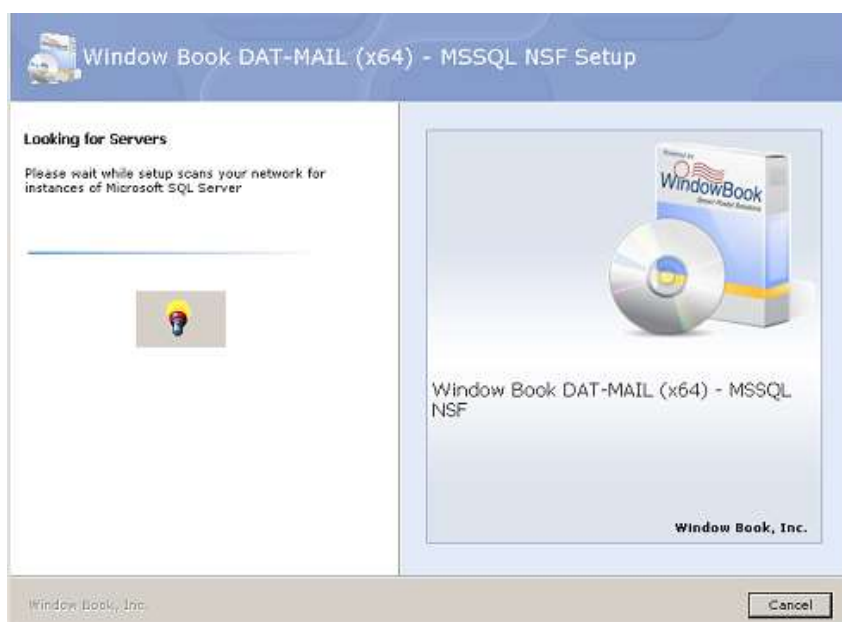
5. The *Installation Options* screen will display. Choose 'Workstation' for the type of installation that should occur;



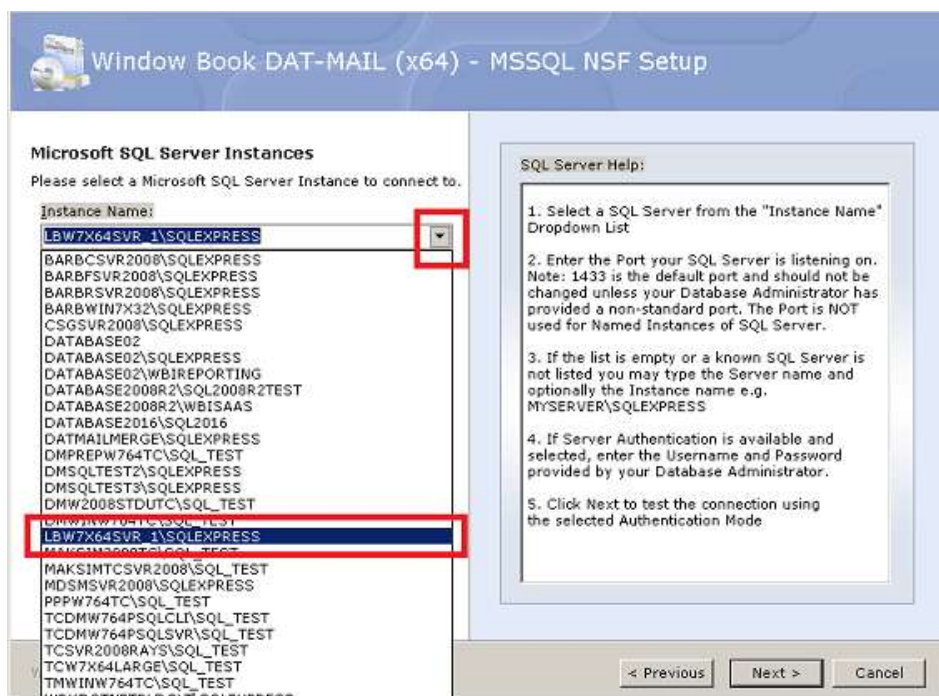
! Do NOT select 'Standalone' or 'Server' for this procedure. Installation instructions for these types of installations can be found at [INSTALL – SERVER AND STANDALONE TYPES](#).

Also, select which type of backup you'd prefer: 'Zip Backup'; or 'Copy Files Backup'.

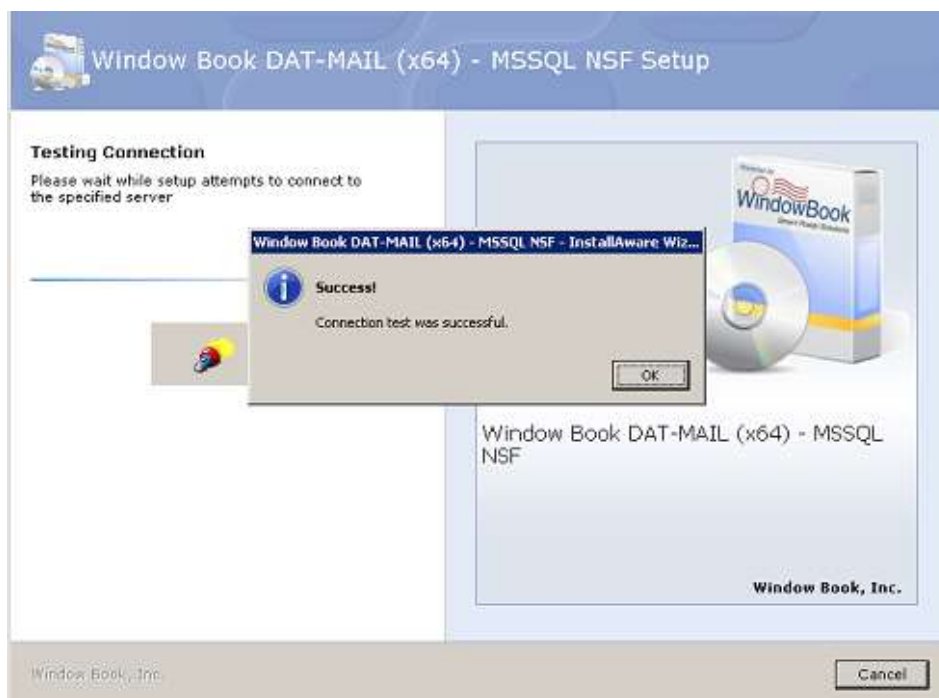
6. The *Looking for Servers* screen will display. The installation wizard is searching for all available SQL Server instances;



When the search for existing SQL Server instances completes, the Microsoft SQL Server Instances screen will display. Click the down arrow to display the list. Locate and select the instance being used by the server installation of DAT-MAIL. Click the **Next** button to continue;



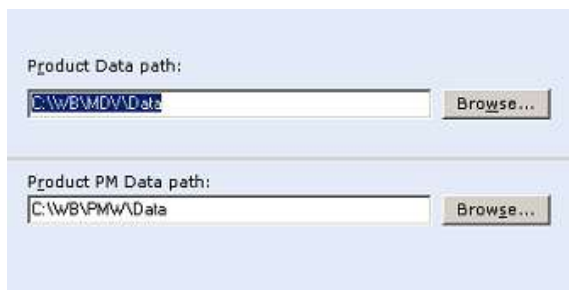
7. The *Testing Connection* screen will display. When a connection has been made, a *Success!* dialog will display. Click OK to resolve/close the dialog;



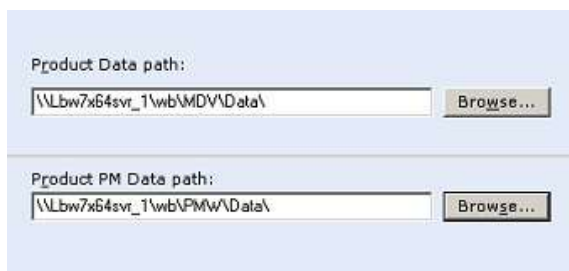
8. The *Choose the application folder – Workstation* screen will display. Install the software on the workstation's local drive (default). Window Book strongly recommends using the default provided. Click the **Next** button to continue;



9. The *Choose the data folder(s) – Workstation* screen will display. Local paths are the default for these folders; however, the workstation software must use the same data folders the server installation of DAT-MAIL uses. Click each data folder's **Browse...** button and locate the name of the same folder that exists on the server – selected folders must use UNC path names;



Default Local Paths for Data Folders



Proper UNC Path Names for Data Folders

Click the **Next** button to continue;

10. The *Choose/Confirm NetBookshelf* screen will display. The default path/location for NetBookshelf will default to a UNC path name of “\\[server name]\wb\WB”. Correct the path to read “\\[server name]\wb\” (i.e. delete the last instance of “WB” that occurs in the default path name);



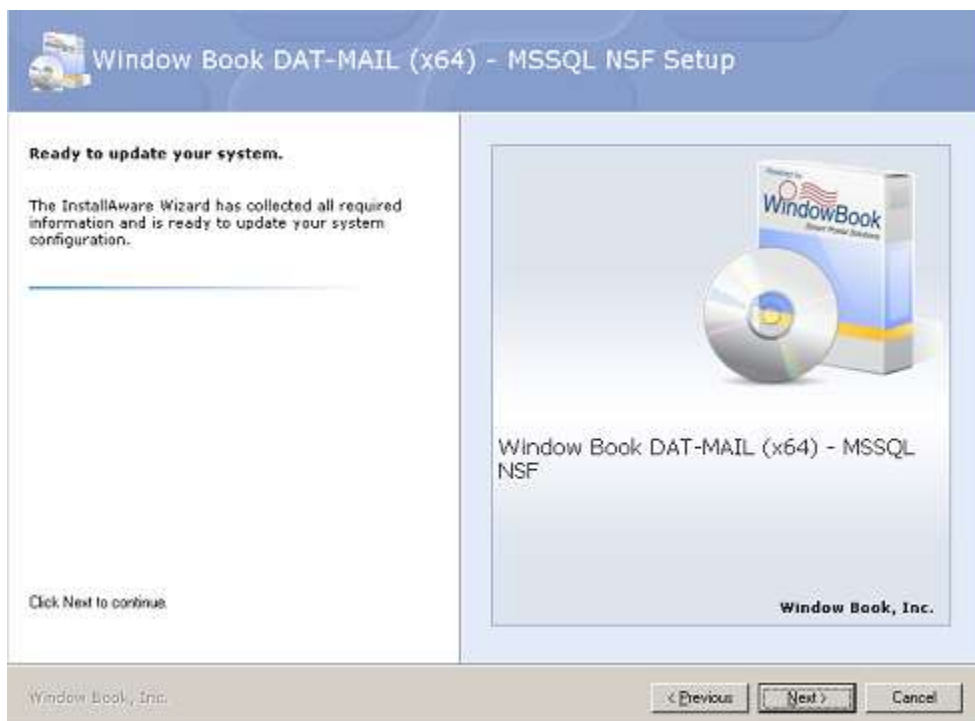
Incorrect (Default)



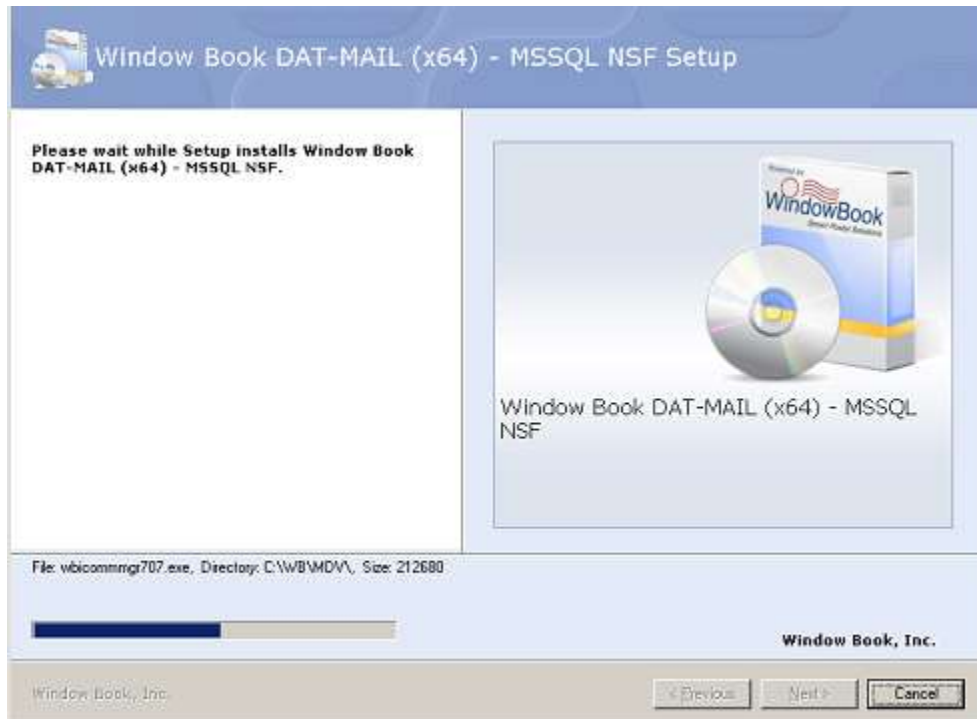
Correct

Click the **Next** button to continue;

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



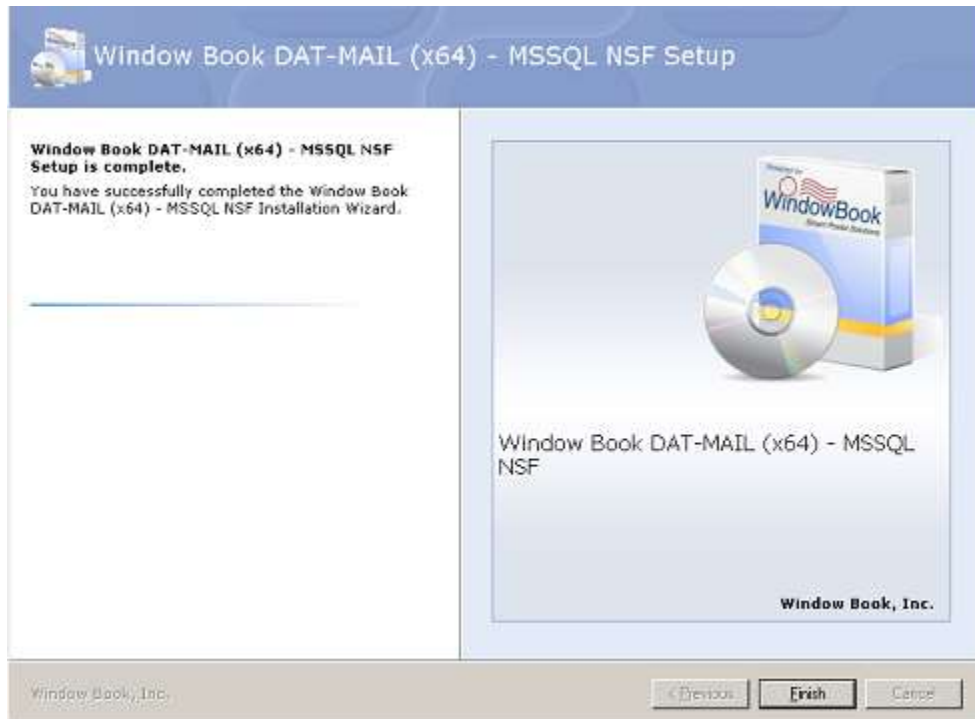
12. A *Please wait...* screen will display as the software is being installed;



During the installation, a *Reboot Required* dialog may display. Click the **OK** button to resolve/close the dialog and continue with the installation;



13. When the installation finishes, a screen will display informing the user that the installation completed successfully. Click the **Finish** button to complete the installation and close the screen;



14. The Workstation installation is complete! If, during the installation, a *Reboot Required* dialog displayed (refer to step 12 above), reboot the workstation. Afterwards, double-click on DAT-MAIL's Desktop icon to launch the software.

i *Registration of the software for Workstation installations is not required. The registration from the server installation carries over to the workstation (refer to [Component Installation Location & Requirements](#) for more information).*

Proceed to [PostalWeb Desktop Dashboard - Installation](#) (if applicable).

B – ENTER THE SERVICE LOGON CREDENTIALS

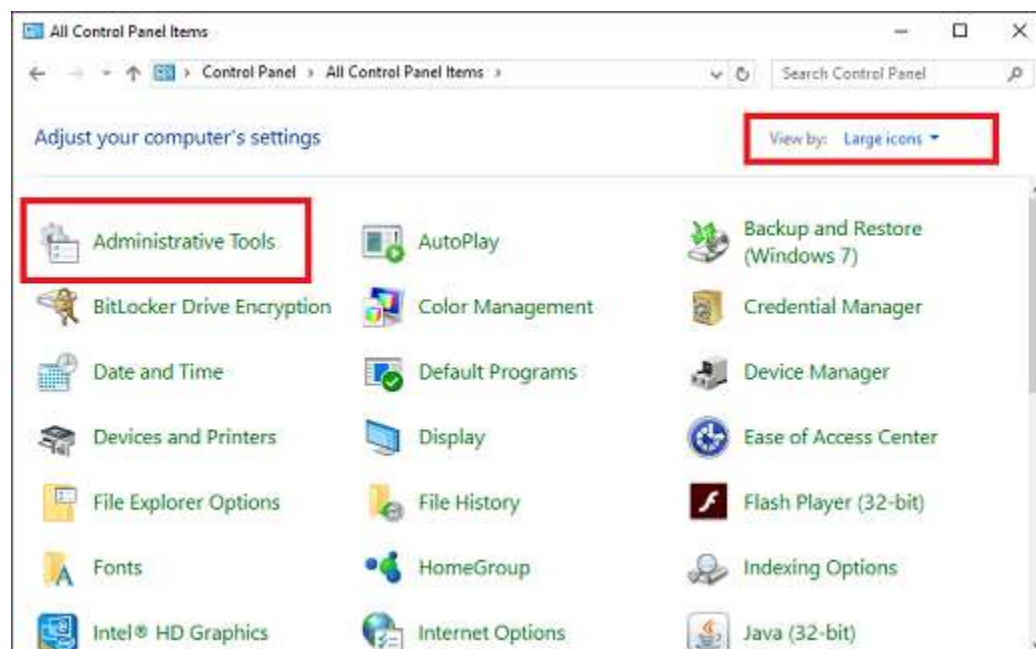
i *Entering the service logon credentials and starting the service pertains to server and stand-alone installation types only. Entering the service logon credentials and starting the service is not necessary for workstation installations.*

Immediately after clicking the **Finish** button once the installation of DAT-MAIL MSSQL completes, the service-specific logon credentials for the Window Book DAT-MAIL Database service must be entered and the service started, for DAT-MAIL to function properly.

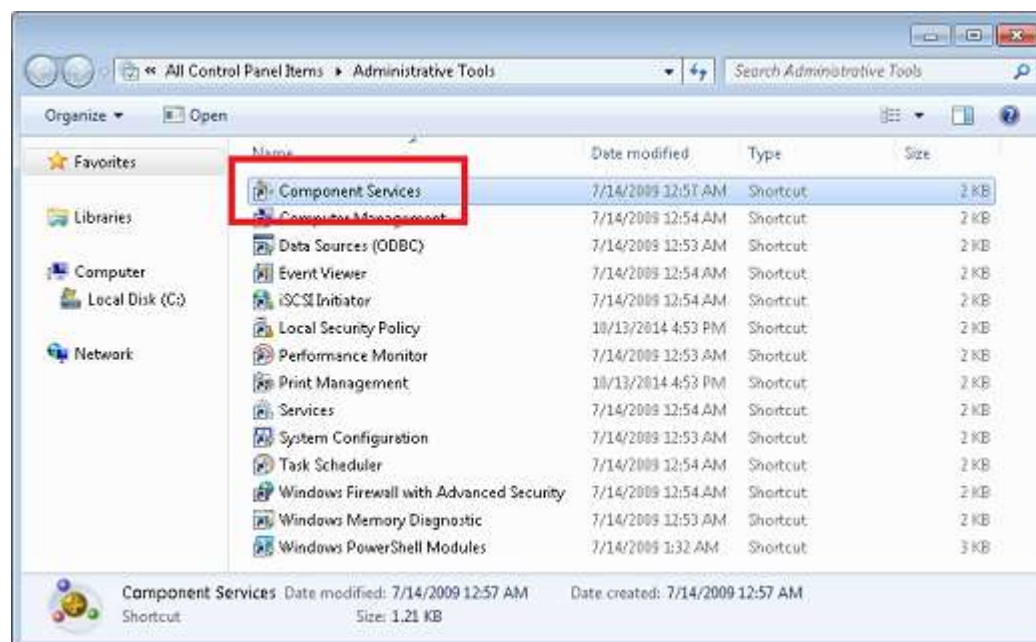
Component Installation

To accomplish this, perform the following:

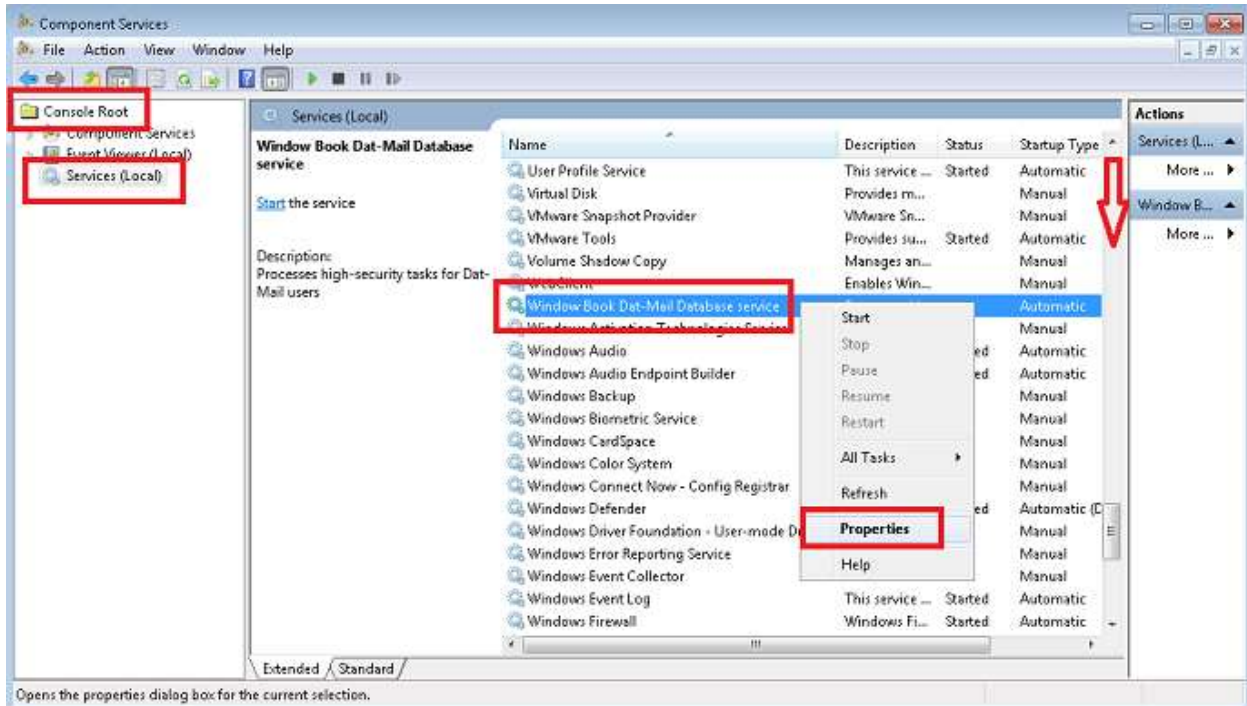
1. On the server or computer, open the Control Panel. Select/open 'Administrative Tools';



2. Within Administrative Tools, select/open 'Component Services';



3. Within Component Services, select/open 'Services' from the *Console Root* panel on the left. A list of the local services will display. Scroll down and locate the "Window Book DAT-MAIL Database service". Right-click on the service and select 'Properties';

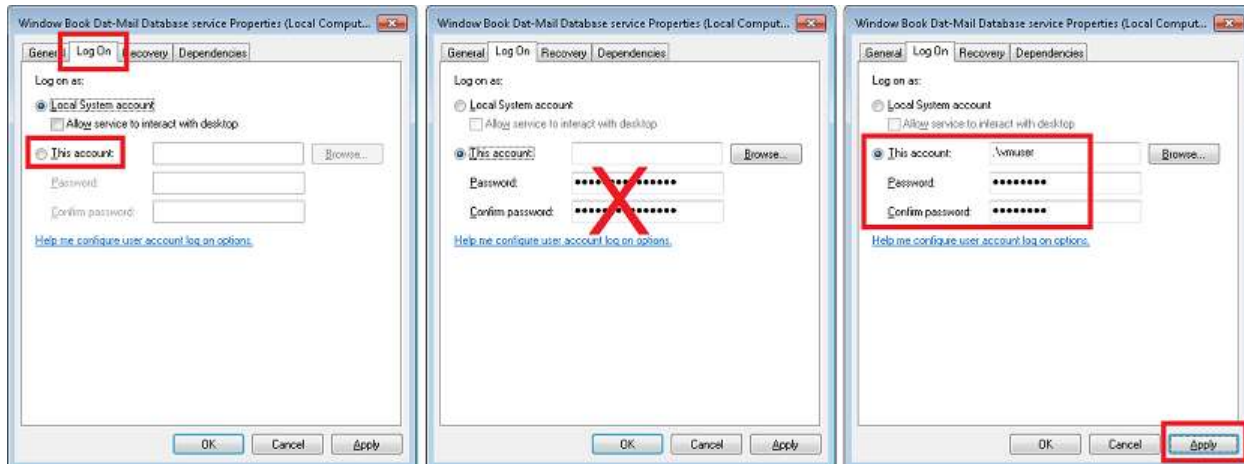


4. The *Window Book Dat-Mail Database service Properties* screen will display.

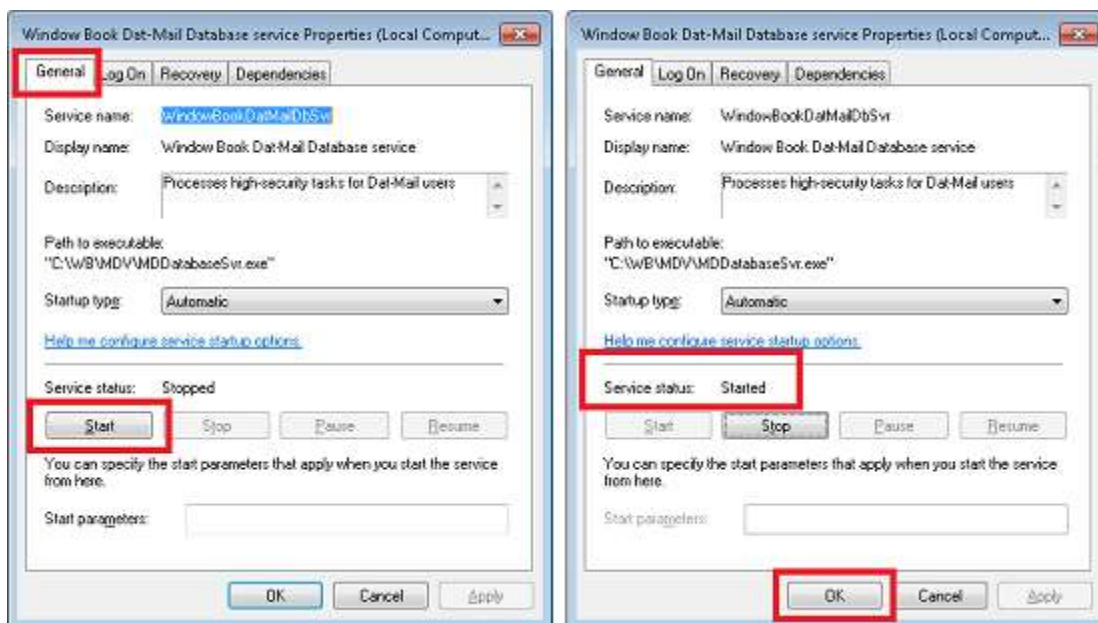
i *If for whatever reason the service is running, stop the service by clicking the STOP button located on the 'General' tab.*

Select the 'Log On' tab. Change the option for logging on from 'Local System account' to 'This account'. When 'This account' is selected, password encryption symbols will display as if a password has already been entered. This is an invalid password and must be changed. Enter the appropriate service-specific logon and password in the fields provided (refer to the [Service Log On Credential Permissions](#) section for more information). The user name or logon name can be searched for and selected by clicking the corresponding **Browse...** button.

Once the valid service-specific logon and password is entered, click the **Apply** button;



5. Select the 'General' tab. Click the **Start** button to start the service. Once the service starts, click the **OK** button to close the *Window Book Dat-Mail Database service Properties* screen;



If the service fails to start, make sure the proper logon credentials (user name and password) have been entered and the credentials contain the necessary rights for running the service (refer to the [Service Log On Credential Permissions](#) section in this Guide for more information).

6. Close the various Control Panel screens and proceed to [C – CREATE A DATA BACKUP DIRECTORY](#).

C – CREATE A DATA BACKUP DIRECTORY

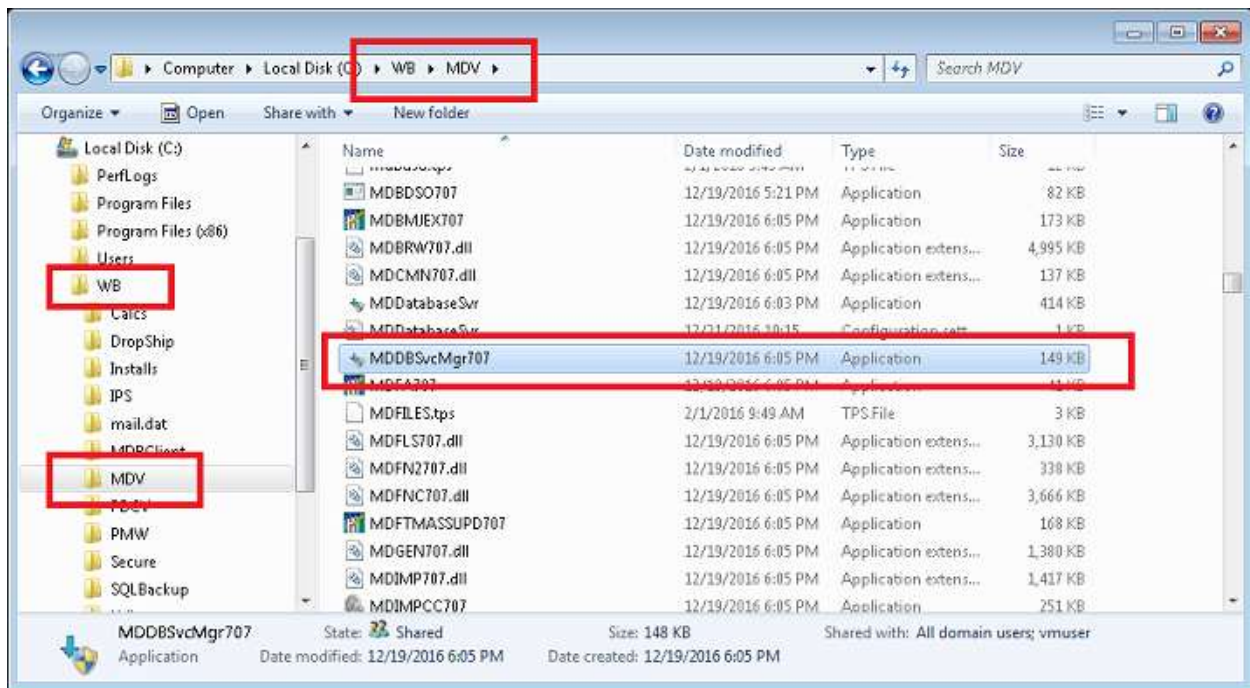


This step is only necessary if the DAT-MAIL data and the MS SQL data reside on different or separate servers. If the DAT-MAIL data and the MS SQL data reside on the same server, proceed to [D – RESTART THE SERVER/COMPUTER](#) in this Guide.

If the DAT-MAIL data and the SQL data reside on the same server, the default backup directory will be the location of the existing DAT-MAIL data directory (i.e. “\\...WB\MDV\Data”).

***IMPORTANT*:** If the DAT-MAIL data and the SQL data reside on different or separate servers, users will need to specify the backup directory that should be used. To do this, perform the following:

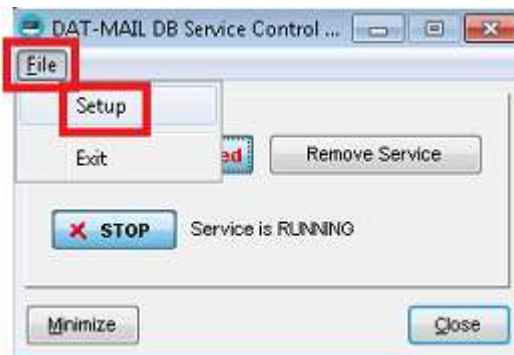
1. Open a Windows® Explorer screen and navigate to the DAT-MAIL program directory (i.e. “\\...WB\MDV”). Locate the ‘MDDBSvcMgr707’ file. Double-click on the application file to launch it.



2. A User Account Control dialog will display. Click the **Yes** button to continue;



3. The *DAT-MAIL DB Service Control...* application will open. Select the 'File' menu, and then 'Setup';

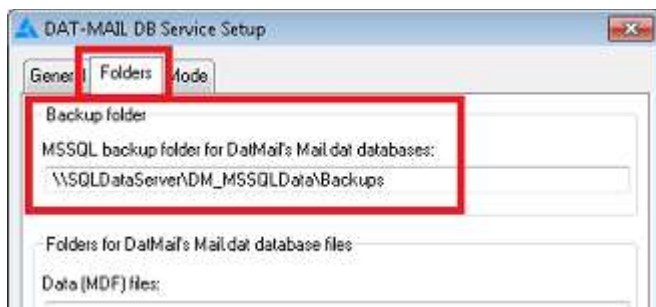


4. The *DAT-MAIL DB Service Setup* screen will display. Click the 'Folders' tab.

Enter a location for the backup directory using a UNC path name. ***IMPORTANT***: The backup directory must be located on the server the SQL data resides on! In the example being used here (see image below), the name of the server that the SQL data resides on is "SQLDataServer". A directory called "DM_MSSQLData" is referenced, as is a "Backups" directory;



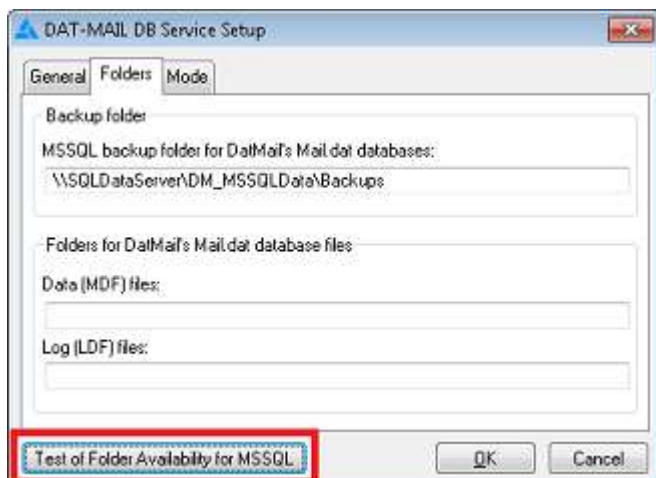
The backup location must already exist on the server being referenced. The DAT-MAIL DB Service Control... application will not automatically create the location/directory for the user.



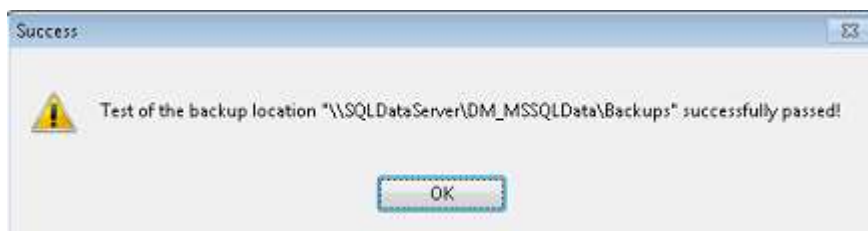
5. When the backup directory is entered, click the **Test of Folder Availability for MSSQL** button;



Make sure to share the backup directory over the network before attempting to establish a connection in the 'DAT-MAIL DB Service Setup' screen.



6. The application will attempt to locate the backup directory. If a connection is made, a *Success* dialog will display. Click the **OK** button to close the dialog;



If a connection cannot be made, make sure the directory exists and it has been shared over the network (i.e. the server DAT-MAIL data resides on has read/write access to it). If those two items have been confirmed, re-boot the server and attempt the connection again.

7. Click the **OK** button to close the *DAT-MAIL DB Service Setup* screen;
8. Click the **Close** button to close the *DAT-MAIL DB Service Control...* application;
9. Proceed to [D – RESTART THE SERVER/COMPUTER](#).

D – RESTART THE SERVER/COMPUTER



This action is only required if the software installation wizard prompts the user to restart the server/computer when the DAT-MAIL installation completes (refer to step 14 under [INSTALL – SERVER AND STANDALONE TYPES](#) or step 12 under [INSTALL – WORKSTATION TYPE](#) for more information).

After the computer or server has been restarted (if applicable), proceed to [E – SHARE OVER THE NETWORK](#).

E – SHARE OVER THE NETWORK



The instructions found in this section are intended for the server in a server with workstation(s) environment only, and are to be performed only on the server where DAT-MAIL was installed. If the program was installed on the 'C:' drive and the data folders (MDV and PMW) were installed on a different drive (e.g. 'D:'), the 'WB' directory that was automatically created during the install on each (i.e. 'C' and 'D') must be shared.



If the DAT-MAIL installation type was 'Standalone', proceed to [F – REGISTER DAT-MAIL](#).

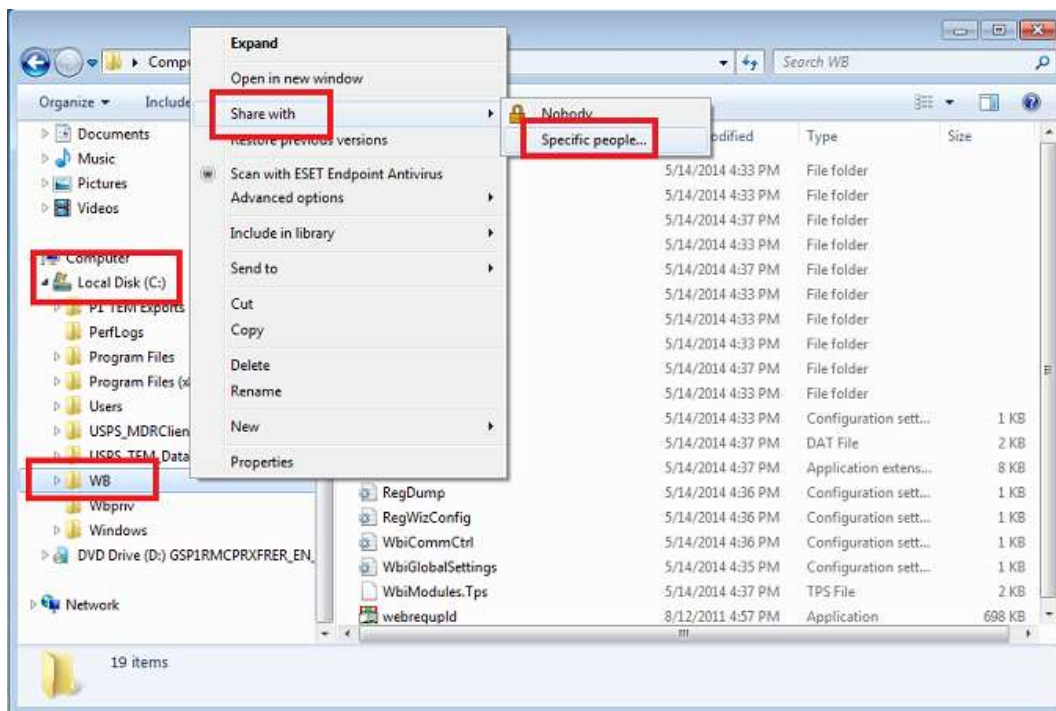
Component Installation

Installation & Update Guide

After the DAT-MAIL installation is complete, the directory it was installed in must be shared with all pertinent users with full control (read/write) for it to be accessible by individual Workstations and *PostalOne!* ('WB' is the default directory specified during the installation process). The same procedure must be completed for the Data folder(s) if they were created on a drive different than where DAT-MAIL was installed (refer to [step 9](#) under the [INSTALL – SERVER AND STANDALONE TYPES](#) section in this Guide).

To share the directory DAT-MAIL was installed under (e.g. 'C:\WB'), perform the following:

1. From the server DAT-MAIL was installed on, open Windows Explorer and select (highlight) the 'WB' directory;
2. Right-click on the 'WB' directory, select the 'Share with' menu option, and then 'Specific people...';



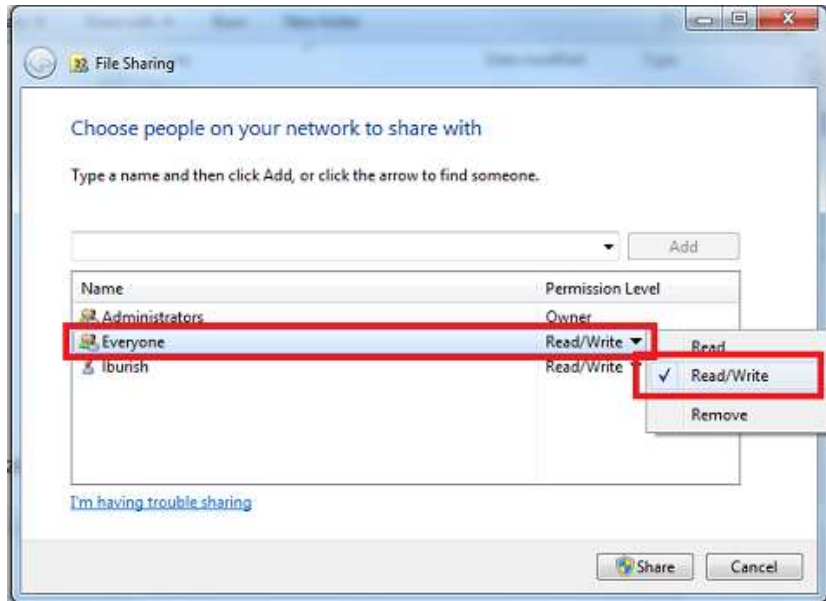
3. A *File Sharing* dialog will display. Specify the users that the 'WB' directory should be shared with. Click the drop-down arrow and select the 'Everyone' option;



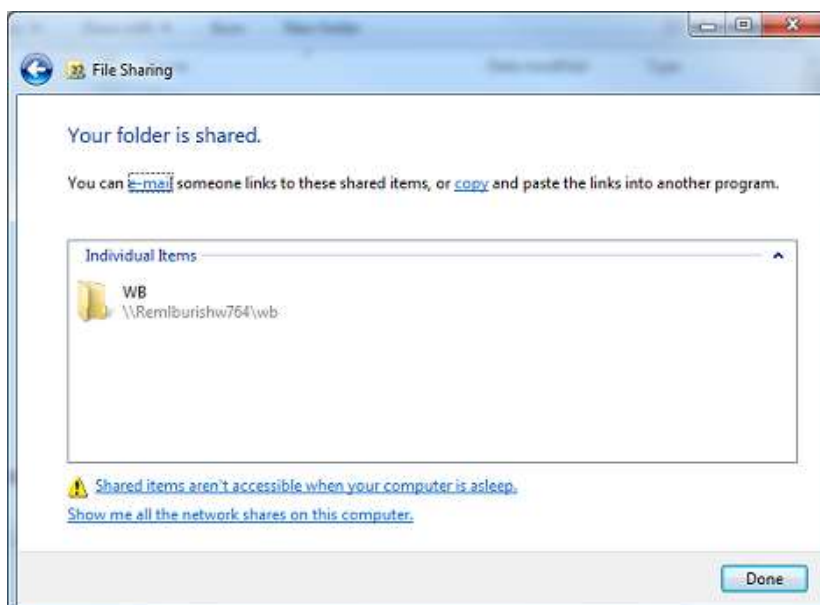
i *A Client may have a specific user group created for those users operating DAT-MAIL. If that is the case, that specific user group would need to be given share access vs. the 'Everyone' option noted above.*

When 'Everyone' is selected, the **Add** button will become enabled (i.e. un-ghosted). Click the **Add** button. The 'Everyone' option will be added to the 'Name' window;

Under 'Permission Level', click the drop-down arrow and select the 'Read/Write' menu option. Click the **Share** button when finished;



A *File Sharing* dialog will display confirming the 'WB' folder has been shared. Click the **Done** button when finished. Proceed to the [F – REGISTER DAT-MAIL](#) section in this Guide.



F – REGISTER DAT-MAIL

i *Make sure to perform all the necessary or applicable preceding steps before registering DAT-MAIL.*

Registering DAT-MAIL is required for both Standalone and Server installation types. Workstation installations do not require registration (refer to [Component Installation Location & Requirements](#) for more information). To register DAT-MAIL, perform the following:

1. The first time DAT-MAIL is launched after installation, the following *Customer Information Screen* will display. Enter the correct information for the required (*) fields;

i *If Window Book needs to contact the Client in regard to something like the Client's registration key or product information, this is the contact information that will be used to do so.*

Customer Information Screen

* Required

Company: * Window Book Inc.

Country: * USA ☐ Not USA

Address 1: * 300 Franklin Street

Address 2: *

City: * Cambridge

State: * MA ZIP+4 Code: * 02139-0000

User Contact Information
[Please specify principal user or technical expert](#)

Contact: * Laura Burish

Phone: * (617) 395-4529 Ext: *

Fax: *

Email: * lburish@windowbook.com

☐ This is a USPS Facility

Registration/Purchase Contact Information

☒ Same as User Contact Information

Contact: *

Phone: * Ext: *

Fax: *

Email: *

Program and registration information:

DAT Mail

R4 v6.16.03.09 — 3/18/2010

Cancel Save

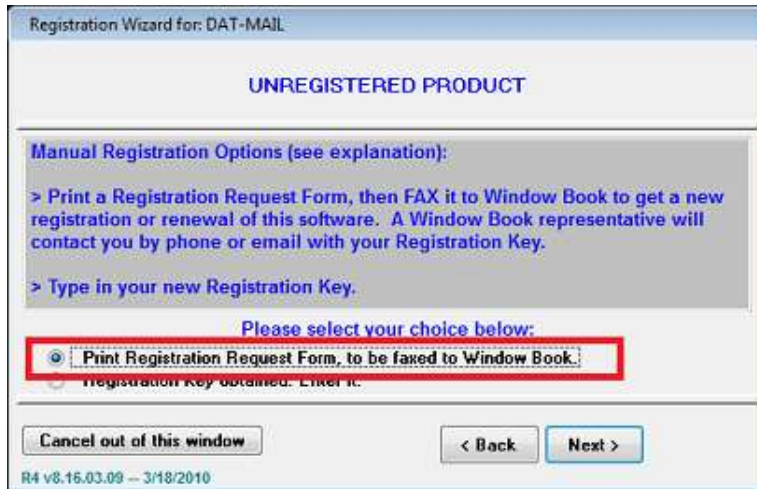
Click the **Save** button to continue;

2. An *UNREGISTERED PRODUCT* dialog will display. Click the **OK** button to close the dialog and continue;



3. The first *Registration Wizard for DAT-MAIL* screen will display. If the user already has a registration key (preferred), proceed to step 13 below;

If the user does not yet have a registration key, select the option to 'Print Registration Request Form, to be faxed to Window Book.';



Click the **Next >** button to continue;

4. Click the Print Registration Form button;




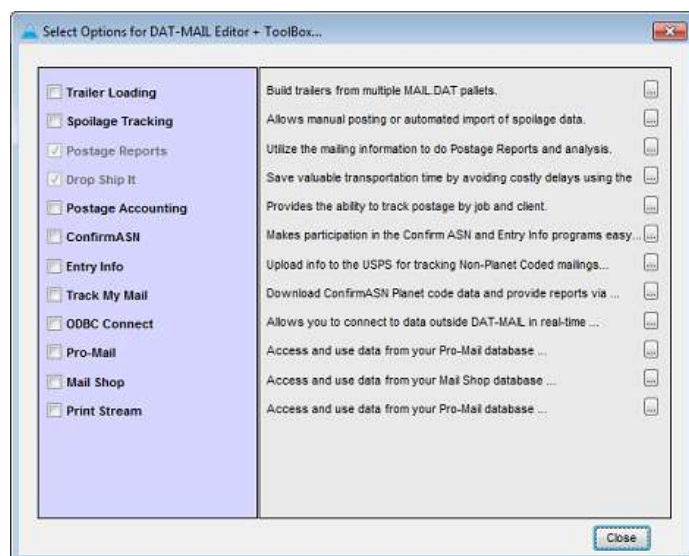
Component Installation

5. A DAT-MAIL Order Specification dialog will display. Click on (select) the DAT-MAIL version to register (e.g. 'Editor' or 'Editor + Toolbox' – these are the only two viable options for receiving DAT-MAIL with PostalWeb Desktop Dashboard). For this example, 'DAT-MAIL Editor + Toolbox' is selected;



6. Click the **Select Optional Components** button to select additional features that can be added;
7. A Select Options for DAT-MAIL Editor + Toolbox dialog will display;

Select (check) the option(s) you wish to add/include. Click the browse  button next to the option's description for more information on that option. Click the **Close** button when finished;



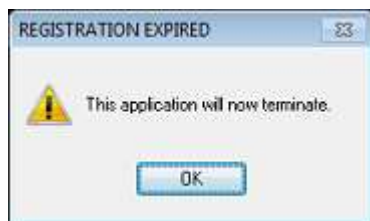
Click the down arrow button next to 'Select Network Option' and select a value pertaining to the number of users that will be using the product (in this example, 'Unlimited Users' is selected);




Click the **Print copy for your records** button if you wish to print a hard copy of the registration key request;

Click the **OK** button when finished;

8. A *Select Printer* dialog will display. Select the available printer (default) or using the drop-down arrow, select the 'Fax' option. Press the **OK** button to complete the print (or fax);
9. The *Registration Wizard for: DAT-MAIL* will display. Click the **Finish** button. Window Book will contact you based on the information provided on the *Customer Information* screen (see [step 1](#) above) to complete the process and issue the requested registration key;
10. A *REGISTRATION EXPIRED* dialog will display. Click the **OK** button to terminate the application;

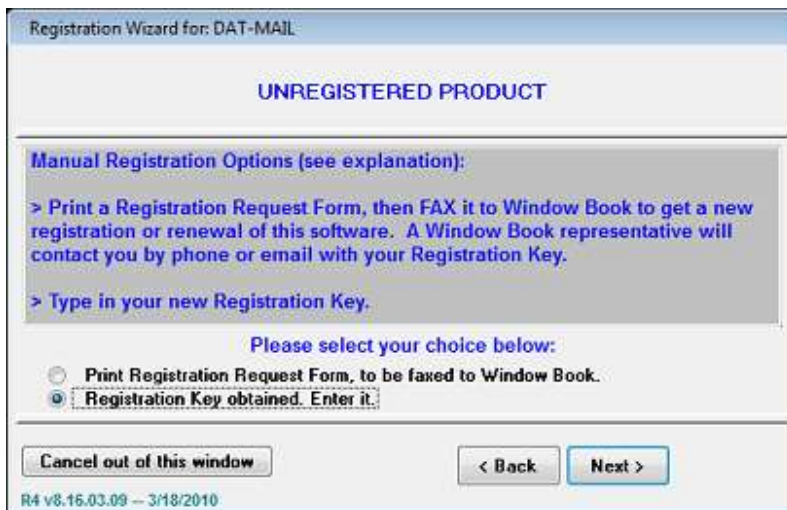


11. Once you have the registration key, double-click on the DAT-MAIL icon  to launch the application;

12. An *UNREGISTERED PRODUCT* dialog will display. Click the **OK** button to close the dialog and continue;



13. Select (click) the option 'Registration Key obtained. Enter it' and click the **Next** button to continue;




14. Enter the registration key in the field provided and click the **Next** button to continue;



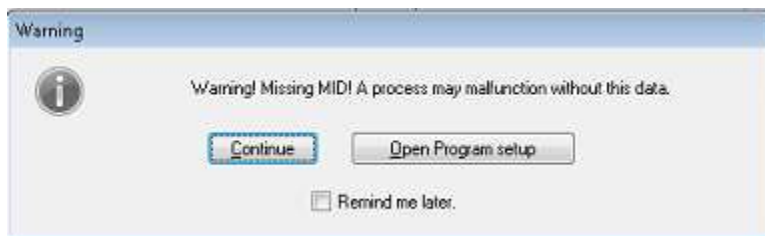
15. Click the **Save Registration Key** button; and click the **Finish** button;

16. The *NEW REGISTRATION ACCEPTED* dialog will display. Click the **OK** button to terminate the application;




17. From the computer or server's Desktop, double click on the DAT-MAIL icon  to launch the application;

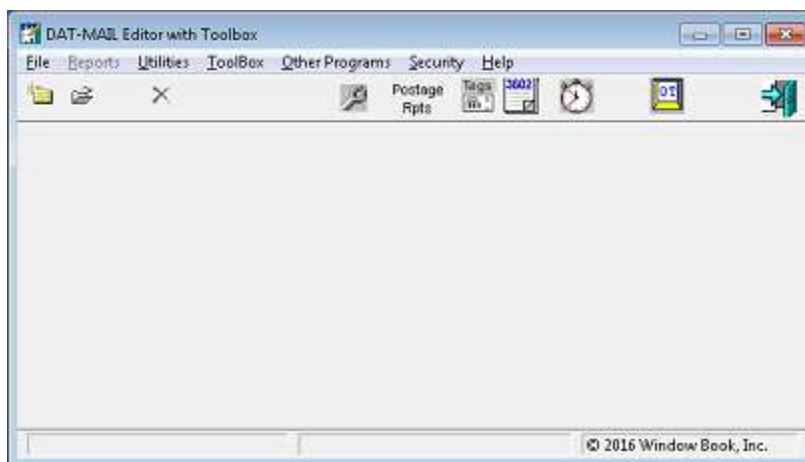
18. A *Warning* dialog will display notifying the user that a MID is missing.



Click the **Continue** button to close the dialog and proceed;

 **Entering the necessary setup information to use DAT-MAIL is documented in the [GETTING STARTED IN DAT-MAIL](#) section in this Guide and should be performed after the installation of any other Window Book software components (if applicable). Refer to the [COMPONENT INSTALLATION SEQUENCE](#) in this Guide for more information).**

19. The DAT-MAIL main screen will display. The installation of DAT-MAIL is complete. Close the application and continue with the next component installation (e.g. [PostalWeb Connector - Installation](#) - if applicable).



G – INSTALL SQL SERVER MANAGEMENT STUDIO



This step only pertains to Clients who have installed MS SQL Server 2017 Express or newer with their DAT-MAIL software. Clients who have installed MS SQL Server 2014 Express should skip this step!

With MS SQL Server 2016 and newer, Microsoft no longer packages the SQL Server Management Studio along with MS SQL Server; therefore, it is no longer automatically installed with MS SQL Server 2017 Express. This means users will have to manually install the SQL Server Management Studio separately on the computer or server where MS SQL Server 2017 is installed after the installation of DAT-MAIL is complete. A link to download the SQL Server Management Studio is available on DAT-MAIL's software download page at: <https://www.windowbook.com/Support/Downloads/DAT-MAIL>.

Automation Scheduler – Installation



The Automation Scheduler should be installed on the same computer or server as DAT-MAIL.



A registration key is required to install and run the Automation Scheduler. Contact your local Window Book Client Services Representative for more information (refer to the [CONTACT INFORMATION](#) section in this Guide). The registration key should be obtained before attempting to install the Automation Scheduler software.

The Automation Scheduler is installed with DAT-MAIL to take advantage of the software's Auto Postal Data Updates plug-in, which is used to automatically download postal facility drop ship and labeling list data used by DAT-MAIL, from Window Book's Data Distribution Web Service.

Installation instructions for the Automation Scheduler with Auto Postal Updates plug-in are provided in the [Automation Scheduler System Guide](#), which is available for downloading from the Support Portal on Window Book's web site at: <https://windowbook.na2.teamsupport.com/login/user>. Registration and/or login is required.

PostalWeb Connector - Installation



PostalWeb Connector is intended to replace the Automation Scheduler's MDSM plug-in (not the Auto Postal Updates plug-in).



PostalWeb Connector should be installed on the same computer or server as DAT-MAIL.



The USPS MDR Client is installed from within PostalWeb Connector after the installation of PostalWeb Connector is complete.



A registration key is required to install and run PostalWeb Connector. Contact your local Window Book Client Services Representative for more information (refer to the [CONTACT INFORMATION](#)

section in this Guide). The registration key should be obtained before attempting to install the PostalWeb Connector software.

PostalWeb Connector with the MDR Client is a required for sending files to *PostalOne!*; as well as, using PostalWeb, and/or PostalWeb Desktop Dashboard. The registration of the Client-specific PostalWeb site (if applicable) and DAT-MAIL should occur before installing PostalWeb Connector.



Refer to the [COMPONENT INSTALLATION SEQUENCE](#) section in this Guide to easily determine at what point the installation of PostalWeb Connector should occur when various Window Book software components are being installed.

PostalWeb Connector runs a Windows® service and should be installed on the computer that acts as the server for installed the Window Book software applications. It operates whenever the computer is running, regardless whether any user is logged in.

The MDR Client (i.e. PROD, PREPROD, TEM, and CAT) is installed from within PostalWeb Connector.

Installation instructions for PostalWeb Connector are provided in the [PostalWeb Connector Installation & User Guide](#), which is available for downloading from the Support Portal on Window Book's web site at: <https://windowbook.na2.teamsupport.com/login/user>. Registration and/or login is required.

PostalWeb Desktop Dashboard - Installation

PostalWeb Desktop Dashboard software should be the final or last component when installing in an environment where other Window Book software components are being installed (refer to the [COMPONENT INSTALLATION SEQUENCE](#) section in this Guide for more information on the various Window Book software system configurations and the installation sequence for each).



A registration key is required to run PostalWeb Desktop Dashboard. Contact your local Window Book Client Services Representative for more information (refer to the [CONTACT INFORMATION](#) section in this Guide). The registration key should be obtained before attempting to install PostalWeb Desktop Dashboard.

PostalWeb Desktop Dashboard should be installed on the same computer or server as DAT-MAIL and PostalWeb Connector. In a server with workstation(s) environment, PostalWeb Desktop Dashboard must be installed on all workstations as well. The same registration key used for the server installation is also used for all workstation installations as long as the number of workstations does not exceed the number the registration key was issued for.



Installation instructions for PostalWeb Desktop Dashboard are provided in the [PostalWeb Desktop Dashboard Installation & Update Guide](#), which is available from within the Support Portal on Window Book's web site at: <https://windowbook.na2.teamsupport.com/login/user>. Registration and/or login is required. This Guide also provides configuration instructions for using PostalWeb Desktop Dashboard with DAT-MAIL.

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BASIC SETUP FOR USE

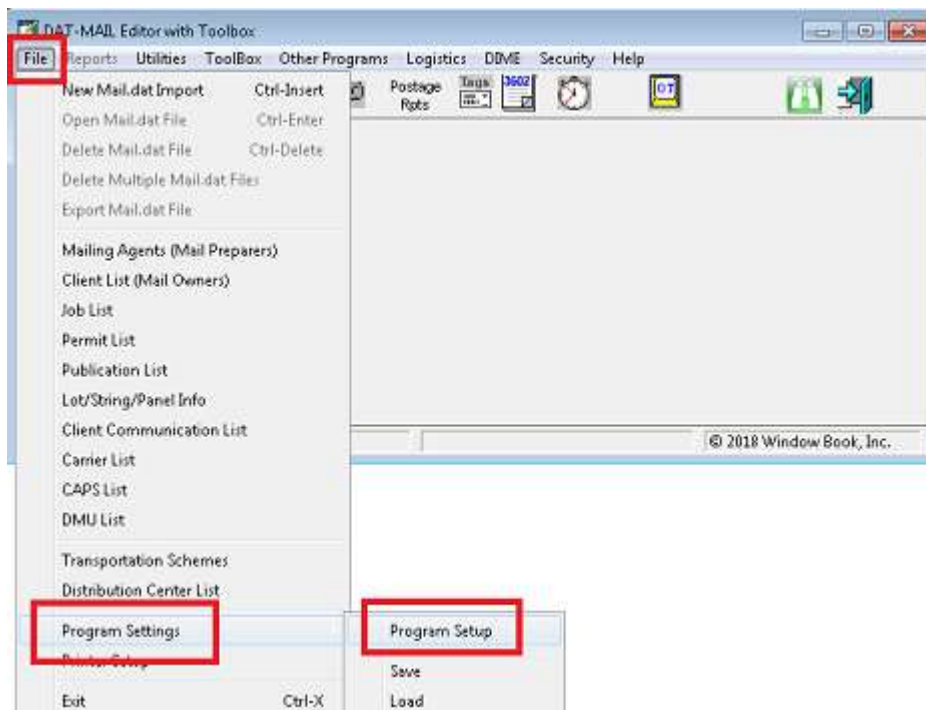
The installation and detailed configuration of DAT-MAIL's software is based on a Client's specific requirements and is most often performed by an individual from Window Book's Professional Services Team.

The setup and configuration instructions provided in this document are the basic steps required for automatically uploading files to PostalOne! with PostalWeb Connector; as well as, being able to enable and use PostalWeb Desktop Dashboard in conjunction with DAT-MAIL, only. If further instruction is necessary or questions arise regarding the general setup and configuration of DAT-MAIL, please contact Window Book's Support Team (refer to the [CONTACT INFORMATION](#) section in this Guide) or refer to the corresponding DAT-MAIL documentation found within the Support Portal on Window Book's web site at: <https://windowbook.na2.teamsupport.com/login/user>. Registration and/or login is required.

GETTING STARTED IN DAT-MAIL

The following information must be entered into DAT-MAIL prior to use: Client MID; Client CRID; and Client IDEAlliance User License Code.

From DAT-MAIL's main screen, click the 'File' menu, and select 'Program Settings', then 'Program Setup'.



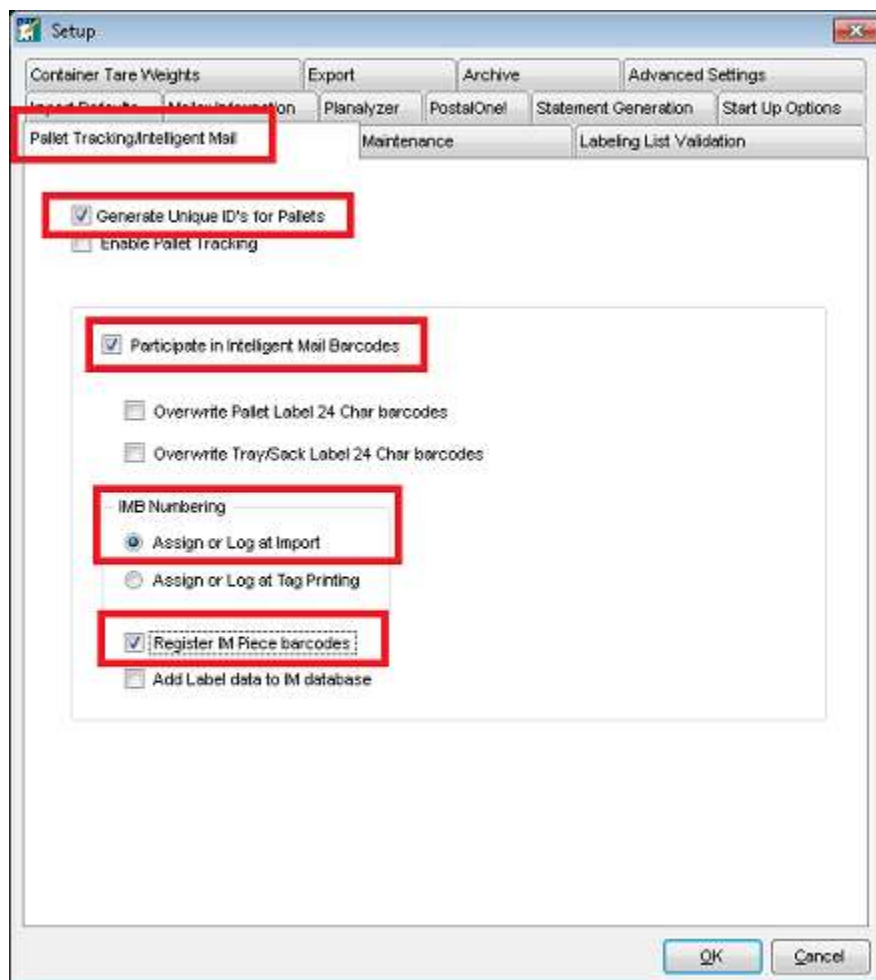
The *Setup* screen will display. Click the 'Mailer Information' tab and enter the MID, CRID, and IDEAlliance User License Code.

The screenshot shows the 'Setup' window with the 'Mailer Information' tab selected. The window has a menu bar with 'Container Tare Weights', 'Export', 'Archive', and 'Advanced Settings'. Below the menu bar are several tabs: 'Pallet Tracking', 'Maintenance', 'Labeling List Validation', 'Import Defaults', 'Mailer Information' (selected), 'Analyzer', 'PostalOne!', 'Statement Generation', and 'Start Up Options'. The 'Mailer Information' section contains the following fields and options:

- Mailer:** Window Book
- Address 1:** 300 Franking St
- Address 2:**
- City:** Cambridge
- State:** MA **Zipcode:** 02139
- Phone:** (617) 395-4529
- CSA ID:**
- CSA CSV File Location:**
- Mailer Duns:**
 - MID:**
 - CRID:**
- IDEAlliance User License Code:**
- Origin Post Office:**
 - Entry Zip Code:** (5 digits)
 - Locale Code:**
 - ZIP+4:** (5 or 9 digits)
 - ☐ DMU Verified ☐ BMEU Verified
- DMU Verification:**
 - ☐ Allow USPS access to maintenance functions
 - ☐ Do not allow USPS to import mail.dat files
 - ☐ Display Mail Sortation Reports for USPS
- Mailer Company Role:**
 - ☒ Company is Mail Service provider
 - ☐ Company is Mail Owner

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

In addition, DAT-MAIL needs to be configured to participate in Intelligent Mail. In the DAT-MAIL *Setup* screen, click the 'Pallet Tracking/Intelligent Mail' tab. Select the following options: 'Generate Unique ID's for Pallets'; 'Participate in Intelligent Mail Barcodes'; IMB Numbering – 'Assign or Log at Import' (or select 'Assign or Log at Tag Printing' depending on the Client's needs); and 'Register IM Piece Barcodes'.



When finished, click the **OK** button to close the DAT-MAIL *Setup* screen.

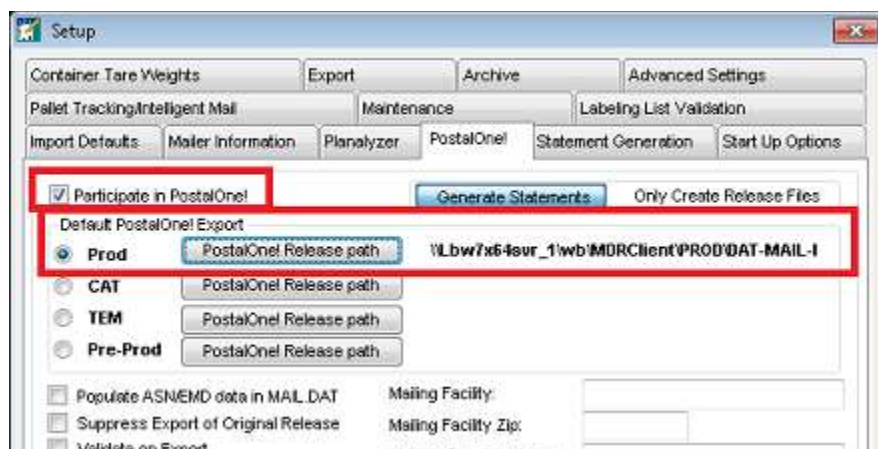
ENABLING THE AUTOMATIC UPLOAD OF FILES TO POSTALONE! IN DAT-MAIL

The automatic upload of Mail.dat files from within DAT-MAIL requires setup in both DAT-MAIL and PostalWeb Connector. The setup for DAT-MAIL is detailed here. For the PostalWeb Connector setup information, including the installation/creation of MDR Client sites (i.e. PROD, PREPROD, TEM, and CAT), which is necessary to complete the setup in DAT-MAIL, refer to the “PostalWeb Connector Installation & User Guide” which is available from within the Support Portal on Window Book’s web site at: <https://windowbook.na2.teamsupport.com/login/user>. Registration and/or login is required.

i *Performing the setup and configuration procedures to automatically upload files to PostalOne! in DAT-MAIL should occur only after PostalWeb Connector has been installed and configured for use.*

After PostalWeb Connector has been installed and configured for use (include the creation of the appropriate MDR Client configuration, i.e. PROD, TEM, PREPROD, and/or CAT), launch the DAT-MAIL Setup screen (refer to [GETTING STARTED IN DAT-MAIL](#) above). Select the ‘PostalOne!’ tab.

Select (check) the option to 'Participate in PostalOne!' and select the 'Default' USPS MDR Client site to use (in the image below, 'PROD' is selected). Click the site's corresponding **PostalOne! Release path** button to navigate to, and select the associated export folder. This folder will have already been created as part of the MDR Client site configuration in PostalWeb Connector.



MDR Client configuration for PROD in PostalWeb Connector

! *If installing DAT-MAIL in a server with workstation(s) environment, it is important to select UNC path names for the folders associated with the MDR Client and uploading to PostalOne! (see images above). Do NOT use local or mapped drives!*

i *A PostalOne! release path/folder can be specified in the PostalOne! tab in DAT-MAIL for any or all four of the MDR Client types as long as a configuration has been created for it/them in PostalWeb Connector.*


Click the **OK** button to save the settings and close the DAT-MAIL Setup screen.

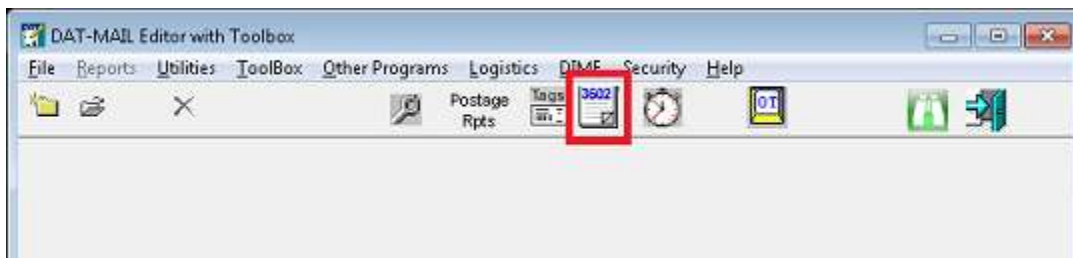
ENABLING POSTALWEB DESKTOP DASHBOARD IN DAT-MAIL



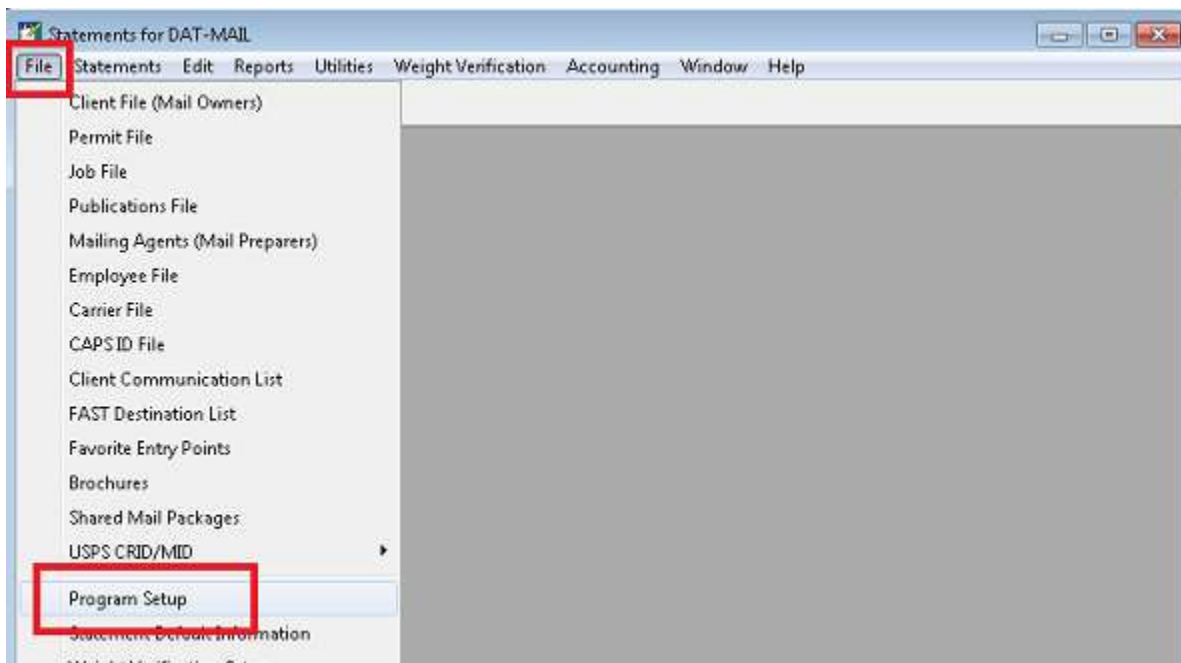
Performing the setup and configuration procedures to use PostalWeb Desktop Dashboard with DAT-MAIL is only required if PostalWeb Desktop Dashboard has been installed, and should occur only after any/all of the other Window Book software system components have been installed and configured (refer to the [COMPONENT INSTALLATION SEQUENCE](#) in this Guide for more information).

This procedure is required to be able to launch and use PostalWeb Desktop Dashboard from within DAT-MAIL. To enable PostalWeb Desktop Dashboard in DAT-MAIL, perform the following:

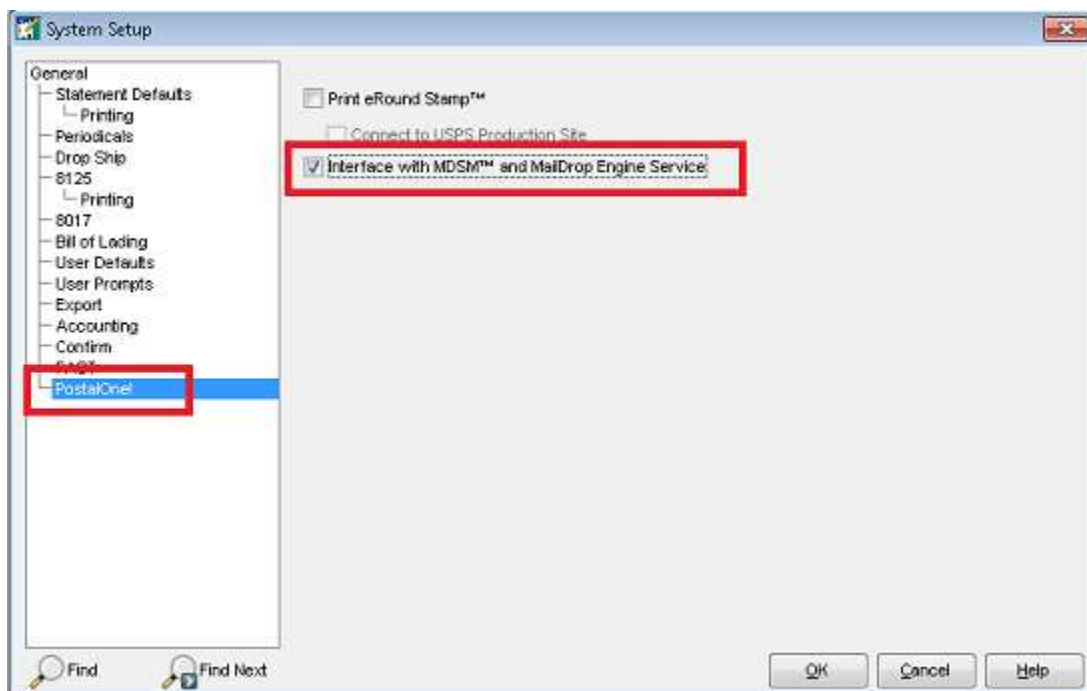
1. From DAT-MAIL's main screen, click the 3602 icon ;



2. DAT-MAIL's 'Statements for DAT-MAIL' utility will launch in a new window. Click on the 'File' menu option, then 'Program Setup';

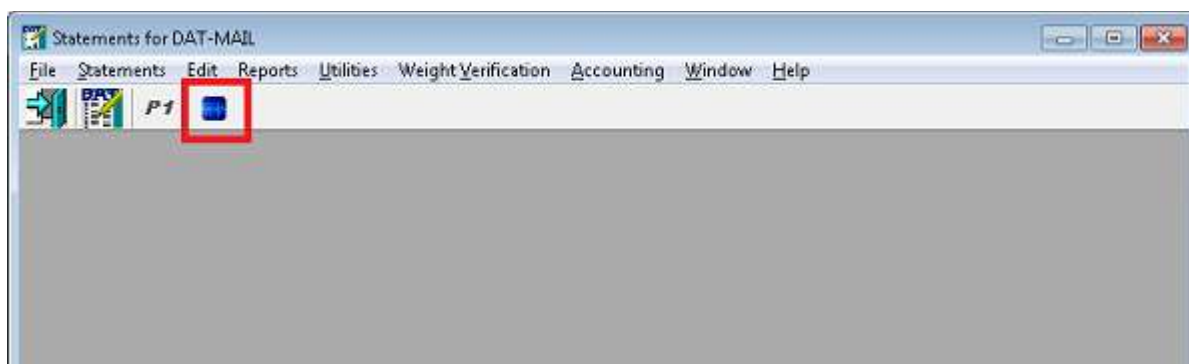



3. The *System Setup* screen will display. Select (highlight) the 'PostalOne!' option located at the end of the list on the left, and then select (check) the option 'Interface with MDSM™' located to the right;



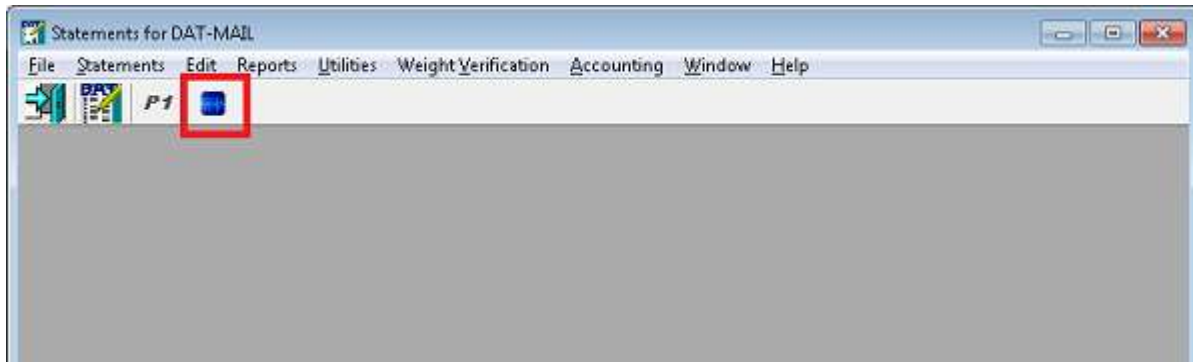
Click the **OK** button to continue, and close the *System Setup* screen;

4. The 'Statements for DAT-MAIL' utility will update. A blue icon button will display in the menu bar at the top of the screen. Clicking this icon will launch PostalWeb Desktop Dashboard from within the Statements utility. Close the utility;

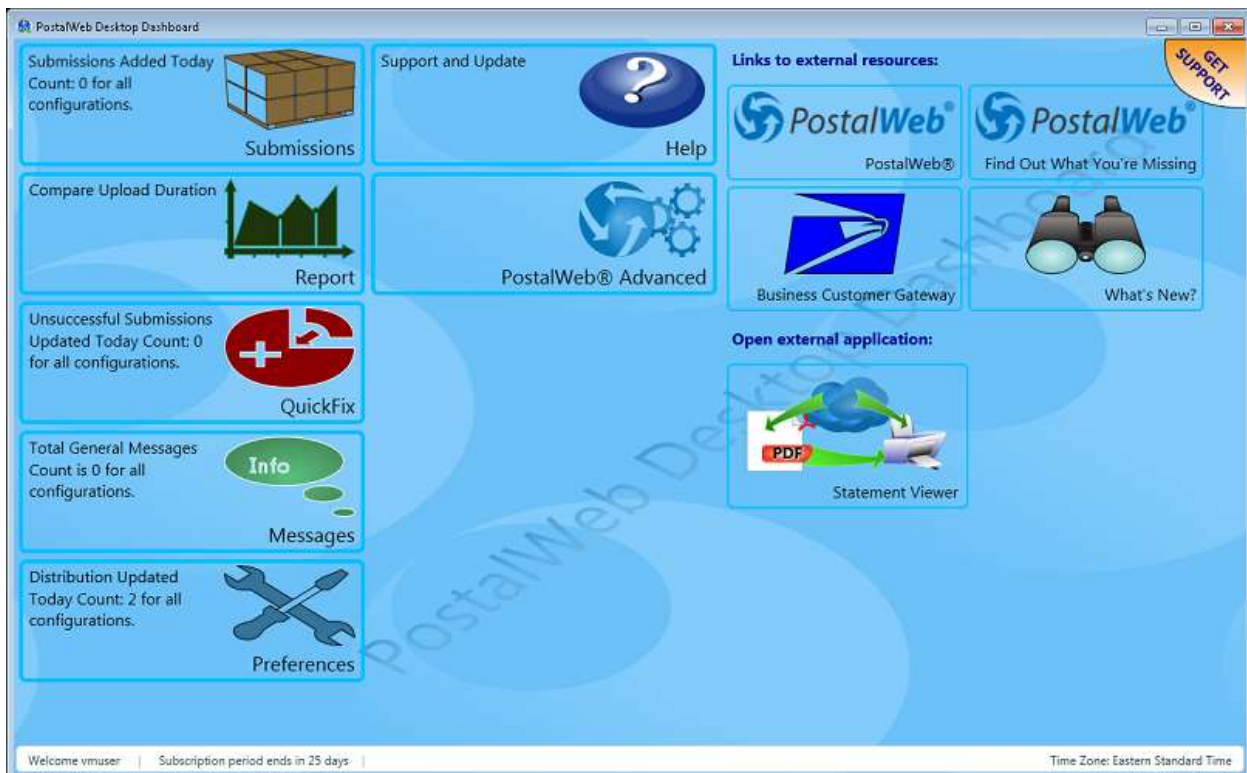


5. Close DAT-MAIL and re-launch it by double-clicking the DAT-MAIL icon  located on the computer/server's Desktop;

6. DAT-MAIL's main screen will display and will contain the PostalWeb Desktop Dashboard icon. Click on the PostalWeb Desktop Dashboard icon to launch the application;



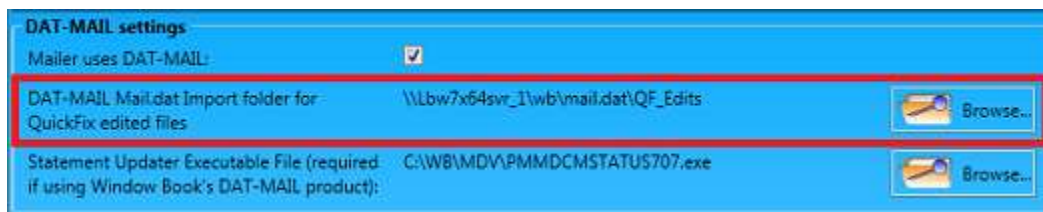
7. The PostalWeb Desktop Dashboard application will launch, displaying the main screen. Close the PostalWeb Desktop Dashboard application.



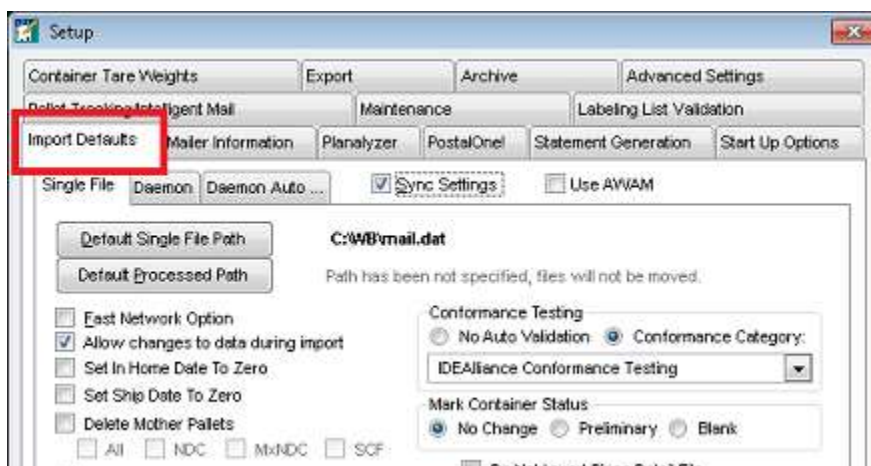
The 'PostalWeb® Advanced' button will only display if the Client's PostalWeb site has been provisioned in the PostalWeb Connector.

Uploading QuickFix Files Back Into DAT-MAIL

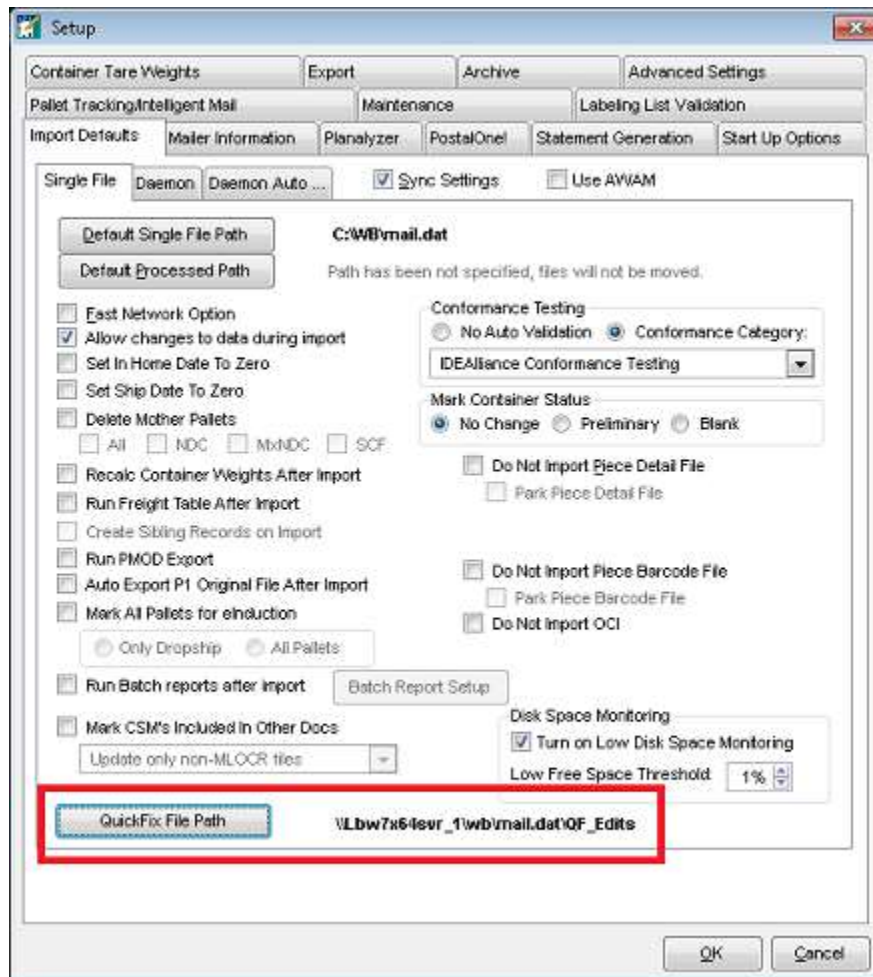
Submitted Mail.dat files that were Rejected or Failed validation can be corrected using PostalWeb Desktop Dashboard's QuickFix feature and re-submitted to *PostalOne!* Once they pass validation and are accepted, the 'fixed' files can then be re-imported into DAT-MAIL. To do this, a specific folder is created in PostalWeb Connector during the setup/configuration of the software where the 'fixed' files are placed prior to being re-imported into DAT-MAIL.



This same folder must then also be specified in DAT-MAIL. Within DAT-MAIL's *Setup* screen (refer to [GETTING STARTED IN DAT-MAIL](#) above), select the 'Import Defaults' tab.



Click the **QuickFix File Path** button. Navigate to and select the folder specified in PostalWeb Connector for housing the 'Fixed' Mail.dat files.



If installing DAT-MAIL in a server with workstation(s) environment, it is important to select UNC path names for the folders that will require access from all workstations (see images above). Do NOT use local or mapped drives!

Click the **OK** button to close the DAT-MAIL Setup screen.

ENABLING POSTALONE CUSTOMER DATA

i A Client-registered PostalWeb site is required to enable this feature. For more information, refer to the PostalWeb Guides which are available from within the Support Portal on Window Book's web site at: <https://windowbook.na2.teamsupport.com/login/user>. Registration and/or login is required.

i This feature requires the PostalWeb Connector, along with the provisioning of the Client's PostalWeb site. For more information, refer to the "PostalWeb Connector Installation & User Guide" which is available from within the Support Portal on Window Book's web site at: <https://windowbook.na2.teamsupport.com/login/user>. Registration and/or login is required.

Although not required for using DAT-MAIL, the PostalOne Customer Data feature allows Clients to use *PostalOne!* customer data when doing Mail Owner MID/CRID, permit, and NPA number lookups in DAT-MAIL's Advanced Navigator (i.e. MPA and CPT views). With the feature enabled they will not have to maintain their own customer files or go through the time-consuming hassle of searching for correct Mail Owner, permit, and NPA information on *PostalOne!*

The Advanced Navigator provides a visual cue (⚠️) that tells when certain information is missing or invalid in the selected job; as well as, whether a permit or NPA number is or is not active. To resolve the issue, simply open the corresponding view and use the browse to search for and find the correct data. The data available to select from is the Clients' own and what they'd find if having to search for it on *PostalOne!*

The screenshot shows the 'Advanced Navigator' window with the following sections:

- Job Information:** JOB ID: 00000001, Job Number: 1503361, Job Name: 1503361, Historical Job ID: 1503361.
- Presentation Category:** P - Conventional Presort, Mixed Full Service 98.6% FS, Standard Letter, Status: Open.
- Total Pieces:** 239,007, P1 Pieces Mailed: 0, P1 Pieces Paid: 0%, Pieces Spoiled: 0, Remaining: 239,007 100.0%.
- Mailing Date:** 10/29/2018, Piece Weight (lbs): 0.8215.
- USPS Promotion / Fee:** Incentive: None, Fee: None, Content: None.
- eDoc Sender CRID:** HDR/SEG: 5593279.
- Trays, Sacks & Pallets:** Trays, Mother Pallets.
- eInduction Pallet Count:** 15.
- Destination Facility Types:**

Type	Pieces
SCF	227,884
Origin	8,021
HDC	3,162
- By / For:** Mail Preparer MID: 200739, Mail Owner CRID: 22847182. A red box highlights the text: 'Not linked to Mailing Agent record' and 'Not linked to Client record.'.
- Postage Payment Permit:** Permit: 9 BOLINGBROOK IL 60440-9998.
- Local Permit Number:** Mail Owner: Type: None.
- Misc Info:** Non-Profit Auth No., Customer Ref ID: 150336-1 BOOMER, Fed Agency Cost Cd.
- Move Update Method:** HCOA.
- Address Hygiene Dates:** Auto Coding Date: 10/26/2018, CRRT Coding Date: 10/26/2018, CRRT Seq. Date: 10/26/2018.
- Verification (Origin) Facility:** BOLINGBROOK, IL 60440-9998.

At the bottom, there are buttons for 'Validation Info', 'Statement Generate', 'PostalOne! Releases', and 'View Statements'.

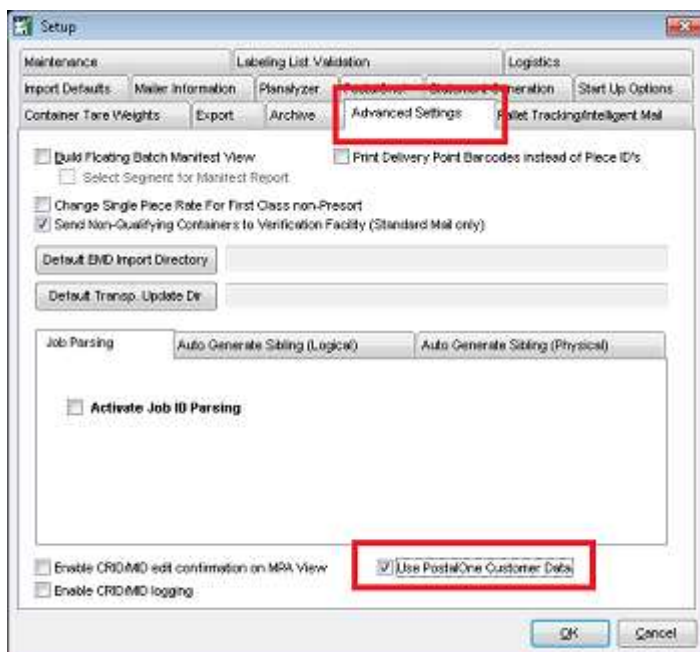


The visual cues will also display for Mail Preparer data that is missing or invalid; however, the PostalOne Customer Data feature only provides PostalOne! data for Mail Owner, permit, and NPA information at this time (December 2018). Clients will continue to have to maintain and select Mail Preparer information using the existing methods.

To enable this feature, select the 'File' > 'Program Settings' > 'Program Setup' menu options from DAT-MAIL's main screen.

The *Setup* screen will display. Select the 'Advanced Settings' tab. At the bottom of the screen, enable (check) the option 'Use PostalOne Customer Data'.

Click the **OK** button when finished.



Every time a Mail.dat file is imported, DAT-MAIL - in conjunction with the PostalWeb Connector - will reach out to the Client's PostalWeb database to look for matching information. If matching information is not found, PostalWeb will send a data request to *PostalOne!* for the information. The entire process is seamless to the Client, occurring quickly behind the scenes.

KEEPING SOFTWARE CURRENT

Installed Window Book software should always be kept current. Current software releases can be downloaded from the Downloads page on the Window Book web site at:

<http://www.windowbook.com/Support/Downloads>.



Software updates to the various software components mentioned in this Guide should be applied in the same sequence used to perform the initial installation. For more information, refer to the [COMPONENT INSTALLATION SEQUENCE](#) section in this Guide.



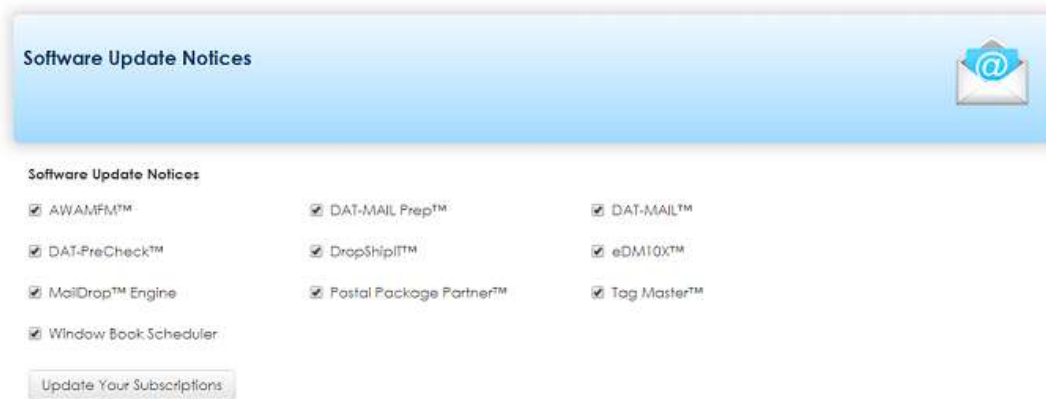
It is important to note that if a Client has Window Book's PostalWeb Desktop Dashboard software installed along with PostalWeb Connector, the two software applications should be updated at the same time. Never update one without updating the other. PostalWeb Connector should be updated before updating PostalWeb Desktop Dashboard.

To receive email notifications automatically when Window Book releases a new version of a particular software program, sign-up for Window Book's 'Software Notices' on the Window Book web site ([Software Notices Support Page](#)). Select the 'Downloads' menu option and then click the **Sign up for Software Update Subscriptions** button. Registration/login is required.

The screenshot shows the Window Book website header with the logo and navigation links: Register, Login, Call 800-477-3602, Online Payment, Solutions, Services, Support, Downloads (highlighted with a red box), Resources, Contact, and About. Below the header is a blue banner for 'Software Downloads' with a download icon. The 'Software Updates Notifications' section follows, explaining a free service for updates. A button labeled 'Sign up for Software Update Subscriptions' is highlighted with a red box, with a note below it stating 'Note: Requires a Login Account'. Below this, there is a reminder to review product release notes and a note about updating multiple products. At the bottom, there is a 'What's New?' banner with a green exclamation mark icon.

Keeping Software Current

Once logged in, select the Window Book products to receive email notifications automatically for when new versions are released. Then click the **Update Your Subscriptions** button.



UPDATING THE SOFTWARE

No manual un-install of an existing instance of DAT-MAIL is necessary before performing a download and installation of an updated version. During the update process, the interactive InstallAware Wizard automatically un-installs the existing installation. In addition, the 'Window Book DAT-MAIL Database service' does not need to be stopped before installing an update to the software. The DAT-MAIL interactive InstallAware Wizard will automatically stop the 'Window Book DAT-MAIL Database service' and then re-start the service once the software update is complete.



If a Client is using AWAM, the Client must stop the AWAM service and close the AWAM utility before performing a software update of DAT-MAIL.

The download and installation of a DAT-MAIL update on the server performs in the same manner as the initial installation of the software. All existing configurations and/or settings will carry over to the updated version. Only if the upgraded software contains new functionality that is visible to the user will additional setup and/or configuration steps be necessary after the installation is complete. If additional setup and/or configuration steps are required, further documentation will be provided.

When updating an existing instance of DAT-MAIL in a server with workstation(s) environment, the physical update need only occur on the server instance. Once the server is updated, all workstations will automatically update the next time the DAT-MAIL software installed on the workstation is launched.



For more information about server and workstation software updates, refer to the [Component Installation Location & Requirements](#) and [DAT-MAIL – Installation](#) sections in this Guide.



For information pertaining to software updates for Window Book software other than DAT-MAIL, refer to the product's installation guide. Software product guides are available from within the Support Portal on Window Book's web site at: <https://windowbook.na2.teamsupport.com/login/user>. Registration and/or login is required.

APPENDIX 1

UNC PATH NAMES

To easily identify and use a UNC path name, perform the following:

1. On the computer, click the **Start** button;



2. From the menu provided, click the **Computer** button;



3. A Windows Explorer screen will display:

Locate the server where the application's data folders reside and select the data folder you need the UNC path name for;

Appendix 1 – UNC Path Names

The folder's file path information will display in the address bar at the top of the screen. Click anywhere in the empty space at the end, or to the right of the path address;



The folder path name will change to display the actual UNC path name for the folder. The UNC path name will be highlighted;



Using the computer's keyboard, press and hold the 'CTRL' key and at the same time, press the 'C' key (you are copying the highlighted UNC path name);

4. Place the cursor in the field where the UNC path name is to be entered. Using the computer's keyboard, press and hold the 'CTRL' key and at the same time, press the 'V' key (you are pasting the copied UNC path name).

EXAMPLE: In the screen image below, the UNC path name has been copied and pasted into the data path fields for a Workstation installation of DAT-MAIL.

