



DAT-MAIL BY/FOR EXCHANGE

DAT-MAIL's By/For Exchange is a utility that allows Mailers to import data from external Client/Mail Owner or Permit tables into DAT-MAIL's Client and Permit tables. New clients or permits will be added, and existing records will be updated. Having up-to-date client/mail owner data in DAT-MAIL linked to valid mail owner MIDs or CRIDs will help the Mailer do the following:

- Avoid having to select a client during statement generation;
- Being able to see at-a-glance whether the correct by/for information is in the Mail.dat file;
- Print DAT-MAIL's postage statements with mail owner name and address;
- Use over 50 reports in DAT-MAIL's Statement Program that include mail owner information; and
- Keep by/for data up-to-date using DAT-MAIL's ability to export files for the USPS Business Customer Gateway and import the spreadsheet files that are returned.



Window Book Professional Services assistance may be required to use the BCG Import function.

Window Book has modules to allow its tables to be synchronized with several popular job-shop programs: PrintStream, ProMail and MailShop as well as BCC's Mail Manager. There are many other possible data sources out there; however, in some cases Window Book's interface cannot be used. The By/For Exchange utility can be run on a regular basis to make sure the latest client and permit data is in DAT-MAIL's tables.

Mailers will have to export their data to one of the following file formats before importing it using By/For Exchange:

- ASCII Delimited (comma or tab delimited);
- ASCII Fixed (fixed length);
- Excel (XLS and XLSX);
- Access; or
- dBase.



Not all Access or dBase versions may work. If the version being used is not compatible, export the file to a .csv file.

By/For Exchange can also export the Client table with one CRID and up to ten related MIDs into one of the file formats listed above. It can also import or export DAT-MAIL's Permit table.



Window Book's DAT-MAIL software version 11.15.08.03 or newer is required for using By/For Exchange as documented in this Guide.

TABLE OF CONTENTS

DAT-MAIL BY/FOR EXCHANGE	1
TABLE OF CONTENTS	2
SETTING UP BY/FOR EXCHANGE IMPORT	3
IMPORT REQUIREMENTS	3
IMPORT - GETTING STARTED	3
Creating a Fixed Length ASCII File Template.....	3
<i>FIXED LENGTH ASCII FILE TEMPLATE MANAGEMENT</i>	11
Defining an Import Template.....	12
<i>IMPORT TEMPLATE MANAGEMENT</i>	18
Mapping the Fields	19
SETTING UP BY/FOR EXCHANGE EXPORT	24
CREATING AN EXPORT TEMPLATE	24
Export Template Management.....	29
USING THE COMMAND LINE	31

SETTING UP BY/FOR EXCHANGE IMPORT

The By/For Exchange utility is launched from DAT-MAIL's 'Utilities' menu, and the Import function from within the utility itself. The Import function requires a sample file of data that is to be imported in order to set up the transfer or import template where the field mapping is done. Once the template is in place, the import can be run as often as a Mailer wants using the latest data.

IMPORT REQUIREMENTS

- Window Book's DAT-MAIL software version 11.15.08.03 or newer;
- A sample file of data that represents an actual production file; and



At this time By/For Exchange and DAT-MAIL do not support international phone numbers (February 2017).

- An import template (import templates are created within the By/For Exchange utility).

IMPORT - GETTING STARTED

Setting up an import process is typically separated into two steps: 1) Defining the template used to import the data into the selected DAT-MAIL table; and 2) Mapping the fields in the sample file used to define the template, to the fields in the selected DAT-MAIL table. However, if the format of the sample file being used to define the template is 'ASCII Fixed' then the creation of an Fixed Length ASCII File template is required, and should be performed before the other two steps.



The file name and location specified in the template cannot change. If either or both of these items change, the field mapping will have to be re-defined.

Instructions for these three processes are provided below.

Creating a Fixed Length ASCII File Template

If the format type of the sample and subsequent production files being used to import data is ASCII Fixed, creating a Fixed Length ASCII File template is required.

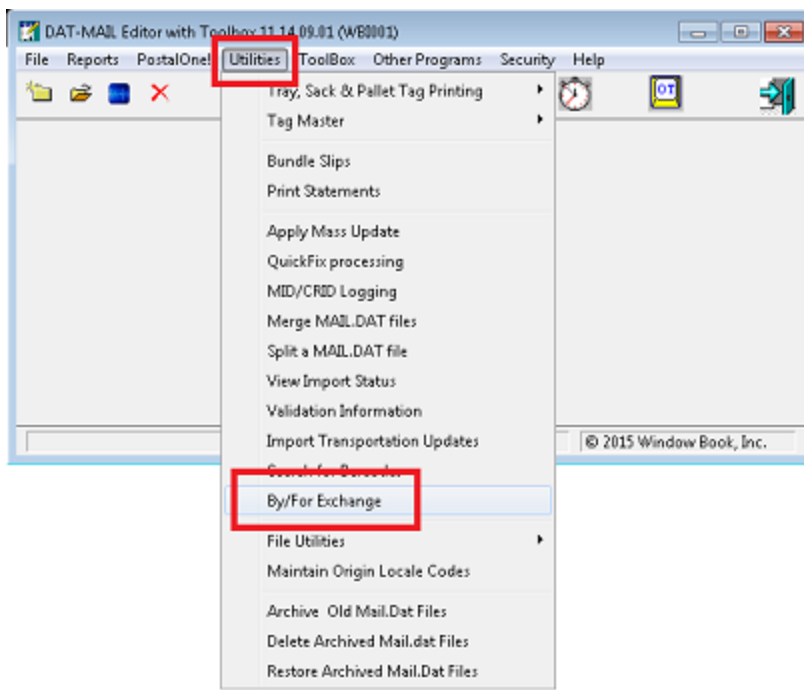


If the format type of the sample and subsequent production files being used to import data is NOT ASCII Fixed Length, creating a Fixed Length template is not necessary. Proceed to the [Defining an Import Template](#) section in this Guide for instructions on how to use the By/For Exchange utility.

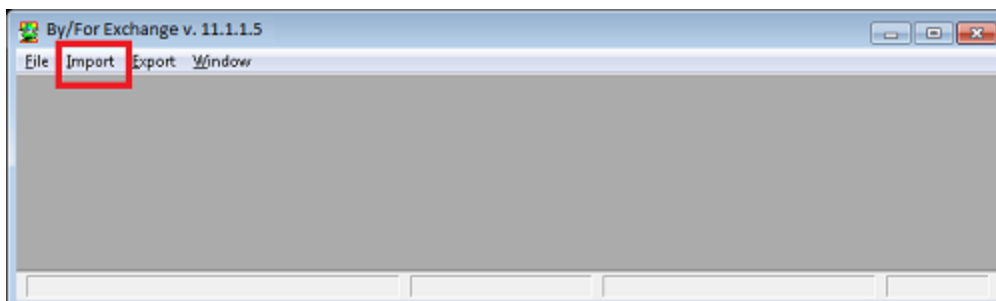
This section includes instructions for both creating an Fixed Length ASCII File template and creating the import template for importing the data into the DAT-MAIL table. After completing this section in its entirety, proceed directly to the [Mapping the Fields](#) section in this Guide.

To create a Fixed Length ASCII File template, perform the following:

1. Launch DAT-MAIL;
2. From DAT-MAIL's main screen, click the 'Utilities' menu, and select the 'By/For Exchange' menu option;



3. The *By/For Exchange* window will display. Click the 'Import' menu;

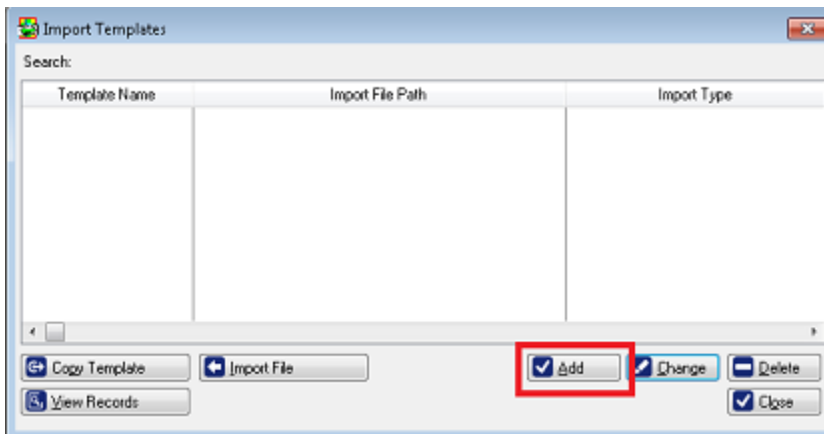


4. The *Import Data* screen will display. Existing templates previously defined will be displayed in list format. In the example being used here, the By/For Exchange utility is being used for the first time, so there are no templates to display.

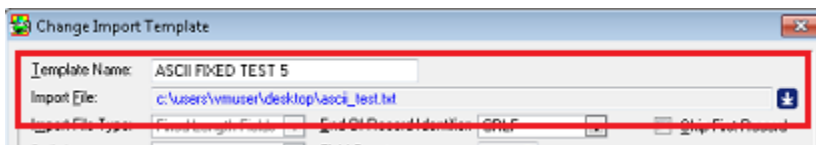
- From the *Import Data* screen, click the **Fixed Length ASCII File Setup** button;



- The *Import Templates* screen will display. The *Import Templates* screen is used to manage all existing Fixed Length ASCII File templates (only). Click the **Add** button;



- The *Add Import Template* screen will display. Enter a name to identify this particular Fixed Length ASCII File template (in the example here, "ASCII FIXED TEST 5" is entered);
- Click the down arrow for the 'Import File' field and locate/select the appropriate ASCII Fixed Length file to be used as the sample for importing;

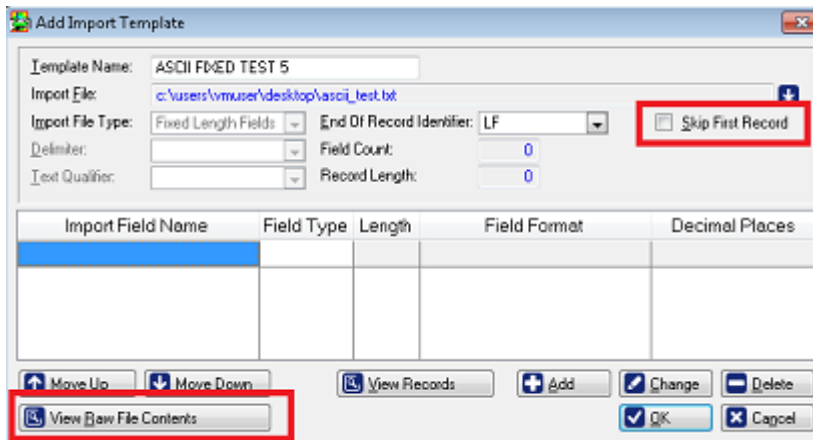


- If not automatically set, select "Fixed Length Fields" as the 'Import File Type'.

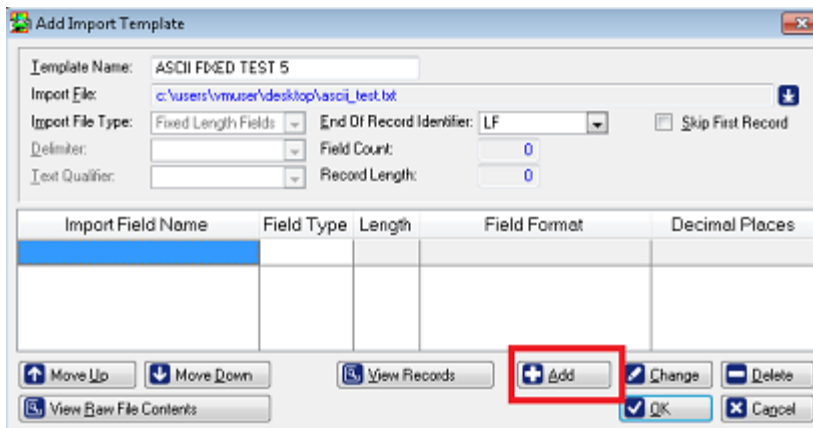
Select an option from the drop down list provided for what is used at the end of each record in the sample file for the 'End of Record Identifier'. Choices are: 'CR' (Carriage Return), 'LF' (Line Feed), 'LFCR', 'CRLF', or 'None' (one continuous line of data is present with no characters in between each record).



10. Select (check) the option to 'Skip First Record' if the first record or row includes field names. Click the **View Raw File Contents** button to determine if the file contains field names;



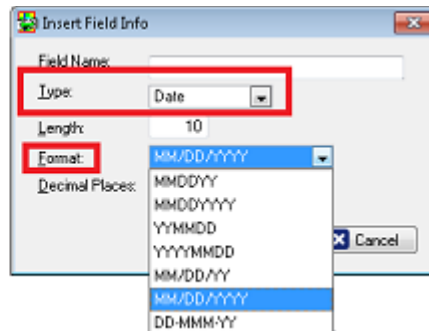
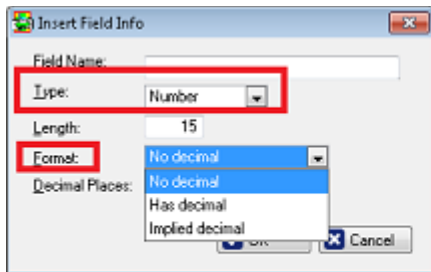
11. Click the **Add** button to begin adding/defining the fields to be included in the Fixed Length ASCII File template;



12. An *Insert Field Info* screen will display:



- **Field Name:** Enter a name for the field (in the example here, newly created fields are labeled as “Field 1”, “Field 2”, “Field 3”, etc.; however, field names should easily identify the field being created and/or should be consistent with the field in the DAT-MAIL table that it will be mapped to);
- **Type:** Select the ‘String’ (alphanumeric information that contains no decimal points), ‘Number’ (numeric values that may or may not include a decimal point, or a decimal point that is implied), or ‘Date’ from the drop down list provided;
- **Length:** Enter the maximum number of characters that the field should contain;
- **Format:** If the ‘Type’ selected is “Number” or “Date”, select the format to apply to the field from the drop down list provided;



- **Decimal Places:** If the ‘Type’ selected is “Number”, enter the number of decimal places (if any) that the values being imported into the numerical field will contain (“Implied decimal” requires a value be specified representing the number of spaces that the decimal will be inserted at in each number being imported);

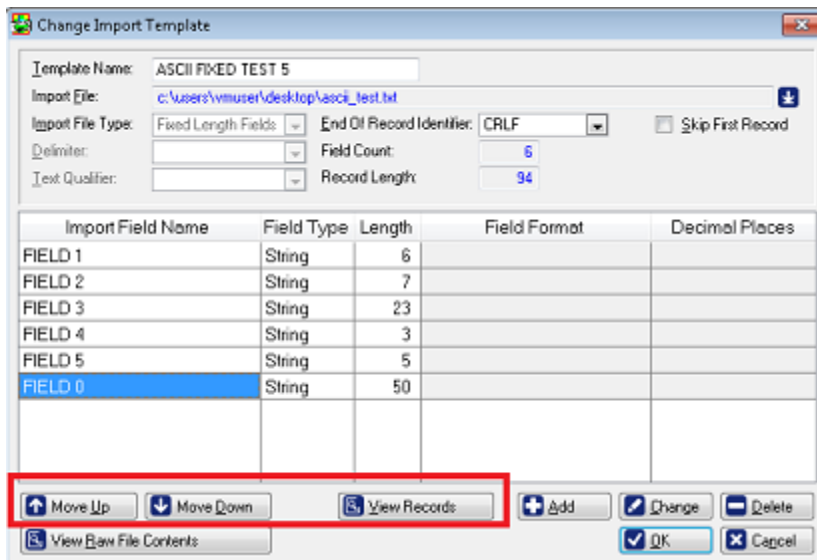
13. Click the **OK** button when done to save the newly defined field and close the *Insert Field Info* screen, or click the **Cancel** button to cancel the creation of the new field and close the *Insert Field Info* screen.

14. Continue to add/create fields (steps 11 through 13 above) until all bytes in the file are accounted for.

- After all fields have been created, the name of the *Add Import Template* screen changes to *Change Import Template*. Click the **View Records** button on the *Change Import Template* screen to view the data from the sample file in the template's format. Scroll through the file to ensure that all of the data aligns properly in the newly defined fields. Make adjustments to the individual fields as necessary by selecting the field and clicking the **Change** button.

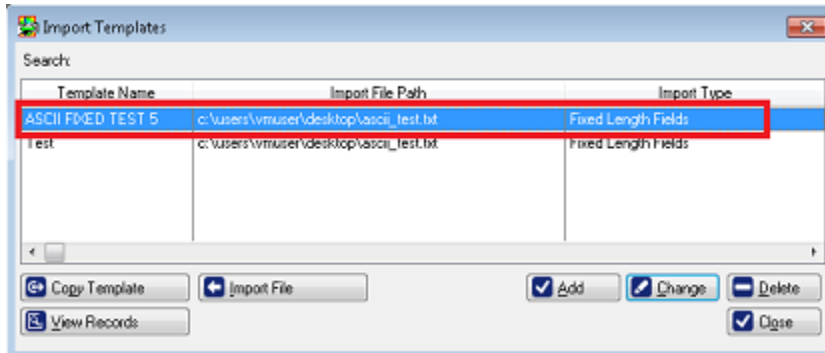
If questions arise about how the raw data appears in the sample file, it can be viewed by clicking the **View Raw File Contents** button.

- The order of newly created fields (i.e. where they appear in the template) can be changed by selecting an individual field and clicking the **Move Up** or **Move Down** button. If a field(s) is moved, Window Book recommends viewing the records to confirm the accurate placement of data. To view the records, click the **View Records** button;



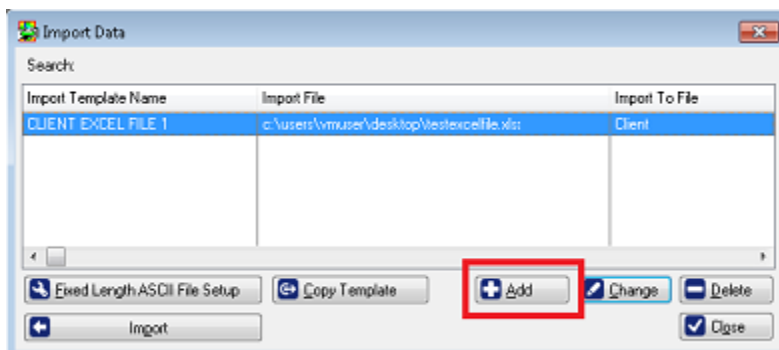
- Click the **OK** button when finished. The *Change Import Template* screen close and the *Import Templates* screen will display with the newly created Fixed Length ASCII File template listed (e.g. "ASCII FIXED TEST 5").

Click the **Import File** button. The .txt file will be converted to a .csv file. The .csv file will be saved in the same location as the .txt file;



Click the **Close** button to close the *Import Templates* screen.

- The *Import Data* screen will be displayed. Click the **Add** button to define a new template used for the actual import process (refer to the information provided under the [Getting Started](#) section in this Guide for further clarification). The new import template being created will use the newly created Fixed Length ASCII File template.



- The *Add Import Specification* screen will display. Select the 'Import To' file (i.e. Client or Permit);

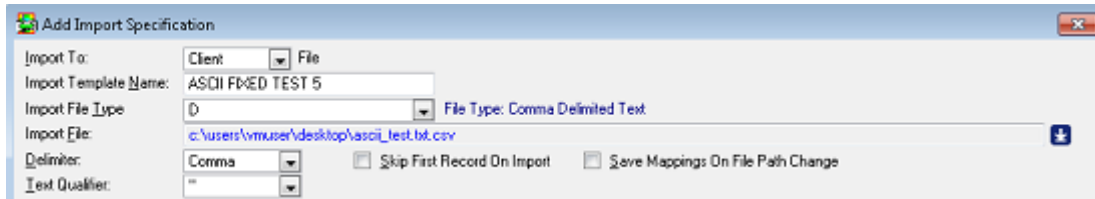
Enter the 'Import Template Name', which must be the name of the newly created Fixed Length ASCII File template (e.g. "ASCII FIXED TEST 5" – refer to step 7 above);



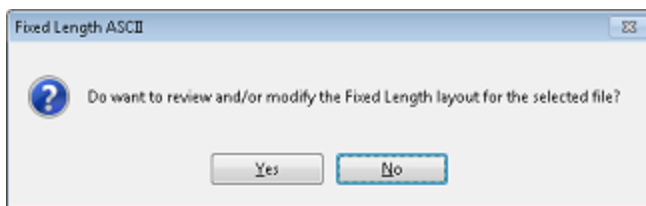
Make sure to type the name of the Fixed Length ASCII File template correctly! Entering the name incorrectly will result in the import not working and the Fixed Length ASCII File template being automatically deleted.


If not already selected, specify the 'Import File Type' as "D" (ASCII Delimited);

Using the down arrow, navigate to and select the same ASCII Fixed Length sample file to used in the creation of the Fixed Length ASCII File template in step 8 above (e.g. "ASCII_Test.txt").

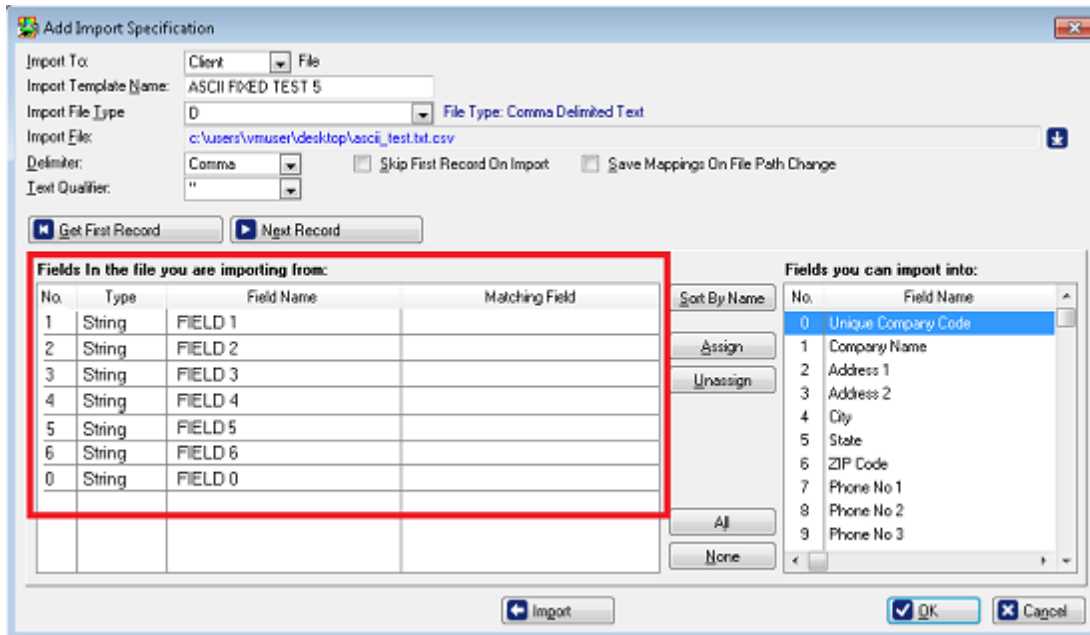


When the file is selected, a *Fixed Length ASCII* dialog will display. Click the **Yes** button to revise or change any of the fields created in step 12 above, or click the **No** button to display the fields as is;



 ***If this dialog does not display, then either the 'Import Name' (i.e. name of Fixed Length ASCII File template) was entered incorrectly or the wrong sample file was selected. At this point, the system automatically deletes the Fixed Length ASCII File template previously created (i.e. "ASCII FIXED TEST 5"); therefore, the user would have to re-create it and attempt the import again.***

The fields created/defined in the Fixed Length ASCII File template will display.

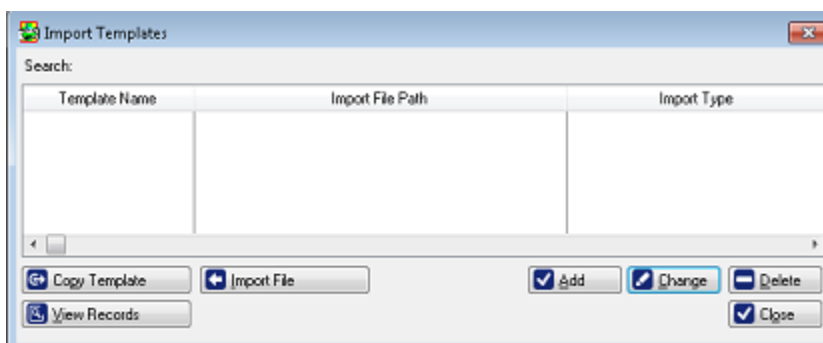


20. Begin mapping the fields of the newly created import template to the selected DAT-MAIL table. To do so, follow the procedure documented in the [Mapping the Fields](#) section in this Guide, beginning with step 1.

FIXED LENGTH ASCII FILE TEMPLATE MANAGEMENT

Once created, all Fixed Length ASCII File templates are listed in the *Import Templates* screen.

To access the *Import Templates* screen, refer to steps 1 through 6 in the [Creating an Fixed Length ASCII File template](#) section in this Guide.



To close the *Import Templates* screen, click the **Close** button.

Add, Change, and Delete

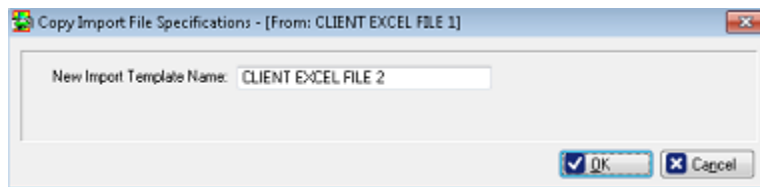
From this screen, Fixed Length ASCII File templates can be added, changed, or deleted by selecting/highlighting the specific template and clicking the appropriate command button.



Any time an import file template that uses a Fixed Length ASCII File template is deleted, the Fixed Length ASCII File Template is automatically deleted along with it. There is no confirmation or warning that the Fixed Length ASCII File template is also being deleted.

Copy Template

Fixed Length ASCII File templates can also be copied to create new/additional templates by selecting/highlighting the template to be copied and clicking the **Copy Template** button. A *Copy Import File Specifications* dialog will display. The copy function will use the copied from template name and add a numerical identifier to it. Use the default template name or edit it as desired and click the **OK** button.



View Records

From the *Import Templates* screen, the records pertaining to a specific Fixed Length ASCII File template can be viewed by selecting/highlighting a specific template and clicking the **View Records** button.

Import File

Records can also be imported for a specific Fixed Length ASCII File template by selecting/highlighting a specific template and clicking the **Import File** button.

Defining an Import Template

This section is intended for creating import templates that use a sample file that is in one of the following formats: Access, Excel, ASCII Delimited, or dBase.

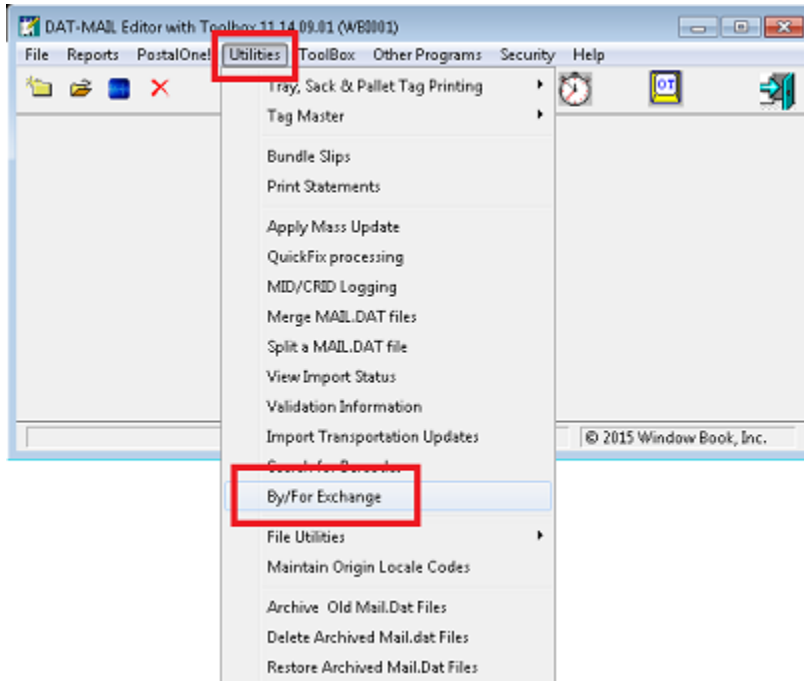


Before proceeding, determine what format the sample file to be used is. If the format type of the sample file is an ASCII Fixed Length file, ignore this section and go to the [Creating a Fixed Length ASCII File Template](#) section in this Guide.

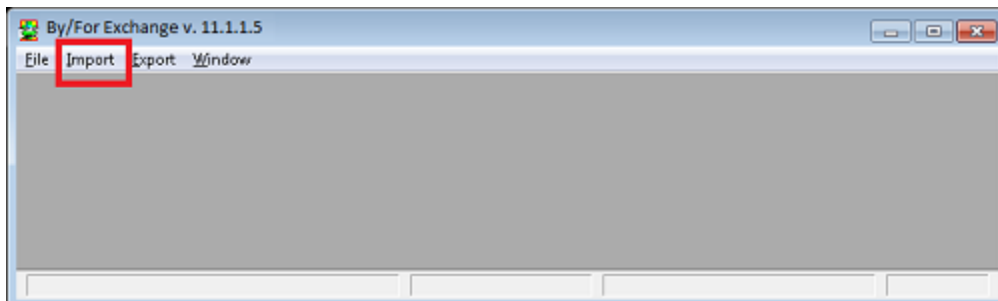
To define an import template, perform the following:

1. Launch DAT-MAIL;

2. From DAT-MAIL's main screen, click the 'Utilities' menu, and select the 'By/For Exchange' option;



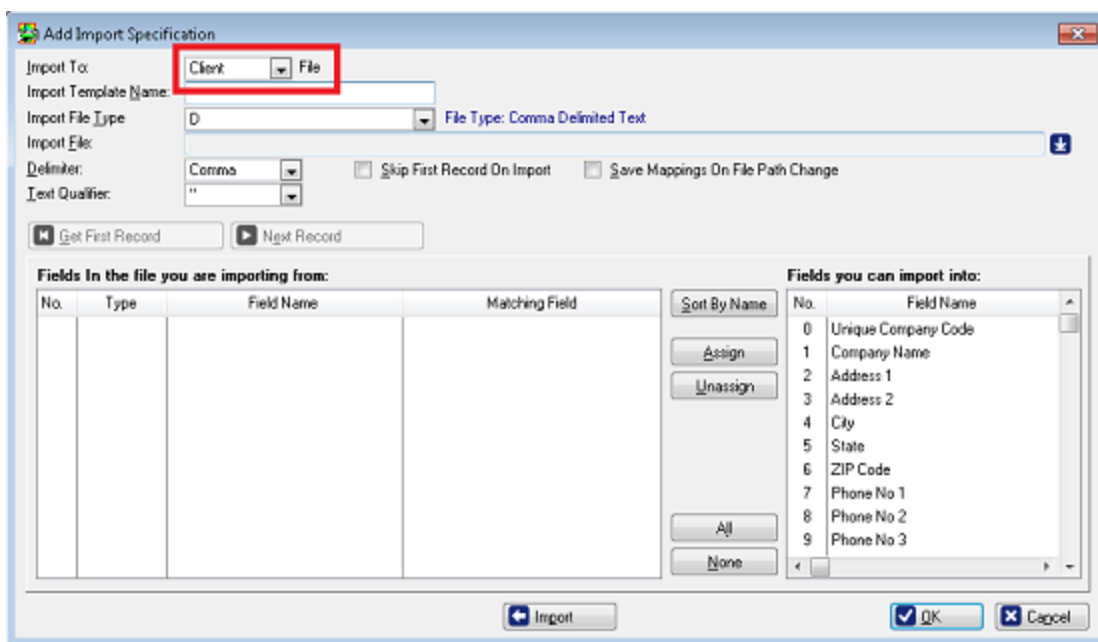
3. The *By/For Exchange* window will display. Click the 'Import' menu;



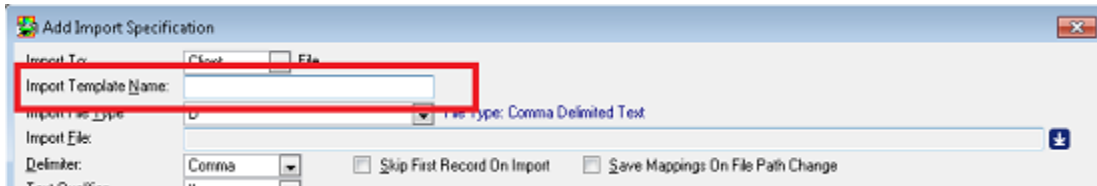
- The *Import Data* screen will display. Existing templates previously defined will be displayed in list format. In the example being used here, the By/For Exchange utility is being used for the first time, so there are no templates to display. Click the **Add** button;



- An *Add Import Specification* window will display ('import specification' is synonymous with 'import template'). Specify whether the template is to be used to import data into DAT-MAIL's 'Client' (mail owner) or 'Permit' file or table by clicking the down arrow next to the 'Import To:' field;



6. In the 'Import Template Name:' field, enter a name for the template;



7. For the 'Import File Type' field, specify the format type of the sample file being used by clicking the corresponding down arrow and selecting the format type from the list provided. Options are:

- A (Access);
- B (DBase);
- F (ASCII Fixed);



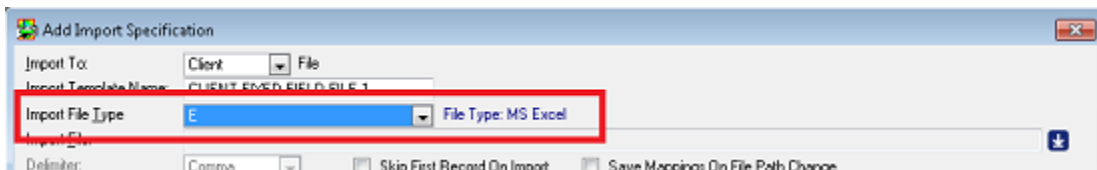
If 'F' (ASCII Fixed) is selected as the 'Import File Type', click the CANCEL button (do not create/save the template) and proceed to [Creating a Fixed Length ASCII File Template](#) section in this Guide.

- E (MS Excel); and
- D (ASCII Delimited).

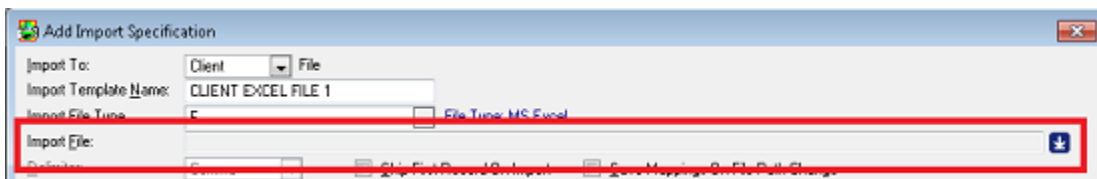


The 'E - MS Excel' selection pertains to .xls and .xlsx files.

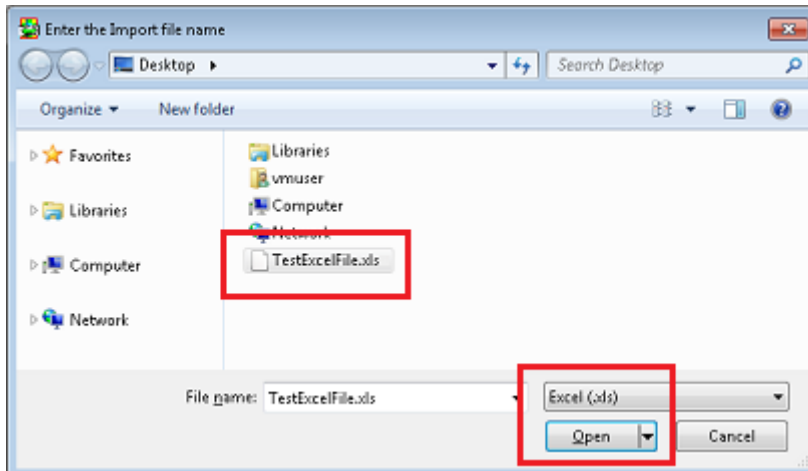
In the example being used here, 'E' for MS Excel is selected;




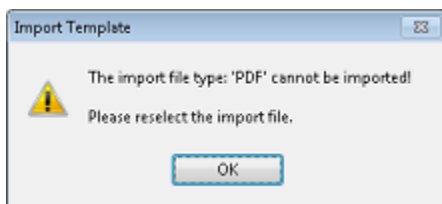
8. Select the 'Import File' or the file to be imported by clicking the field's corresponding down arrow.



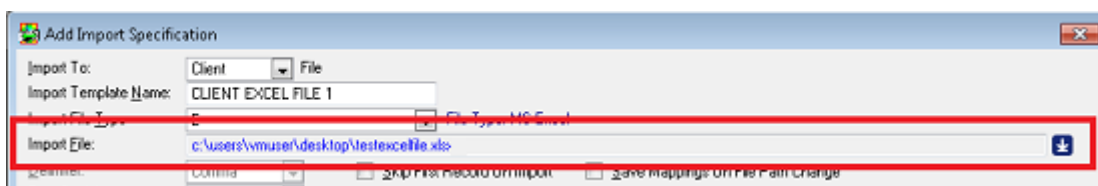
9. An *Enter the Import file name* browse window will display. Locate and select the file to import. Click the dialog's **Open** button to close the window and return to the *Add Import Specification* window.



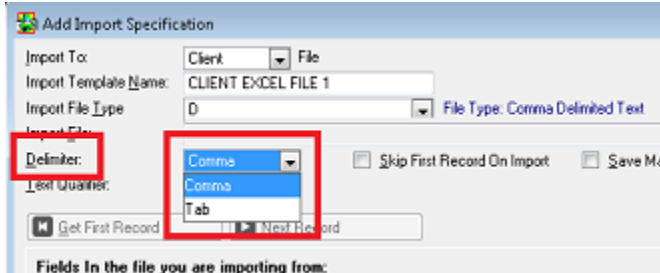
 **If the file type of the file selected for importing does not match the file type specified earlier for the 'Import File Type' field (see step 7 above) an 'Import Template dialog' will display. Click the OK button to resolve the dialog and reselect the appropriate file for importing or make the necessary adjustments to the 'Import File Type' field and select the file again.**



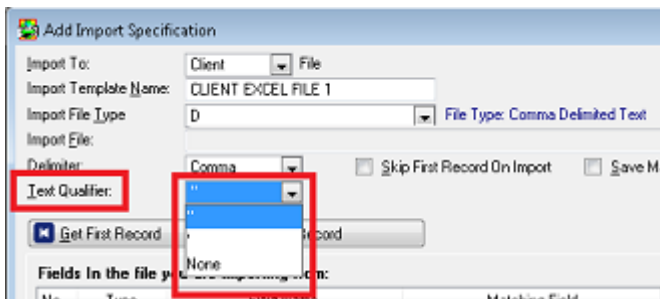
10. The selected file and the file path will display;



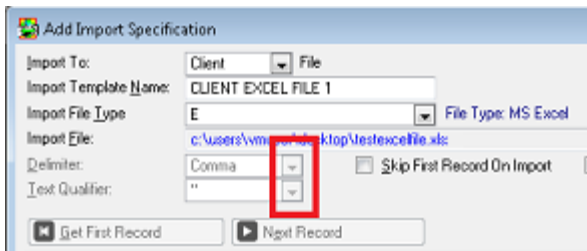
11. If the 'Import File Type' selected is 'D – ASCII Delimited', use the corresponding drop down arrow to select what the delimiter should be (if the 'Import File Type' selected is not 'D – ASCII Delimited', proceed to step 13 below);



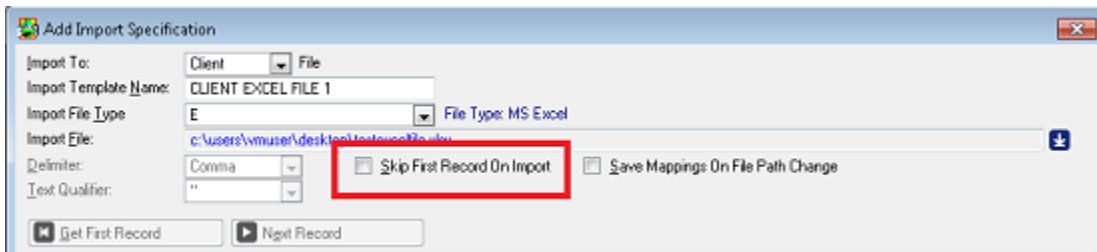
12. Then select the correct text qualifier (i.e. “, ’ or ‘None’)



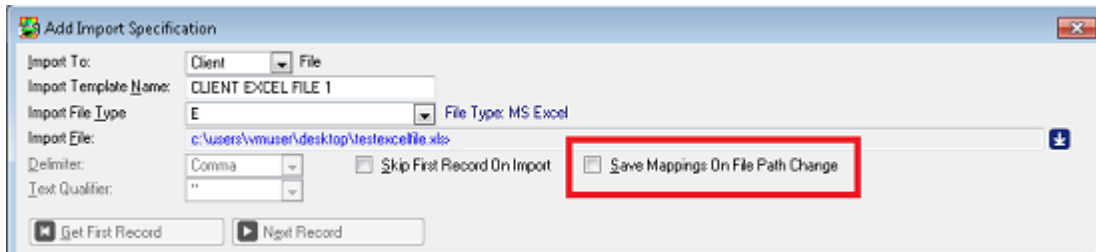
If the 'Import File Type' selected is not 'D-ASCII Delimited', then the 'Delimiter' and 'Text Qualifier' selections will be unavailable (i.e. grayed out).



13. If the file being imported has column headers or field names, select (check) the option to 'Skip First Record On Import';



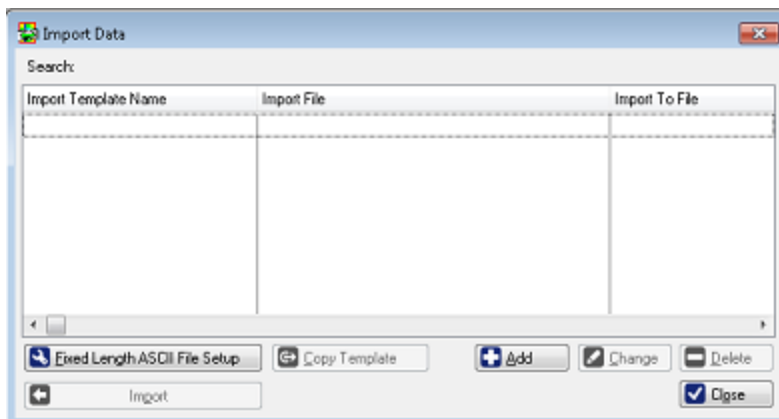
14. If subsequent imports of the file are intended, and the newer versions are saved in different locations or folders, select the option to 'Save Mappings On File Path Change' to avoid having to re-map the fields each time;



15. The next step in setting up the import template is mapping the fields. To do this, proceed to the [Mapping the Fields](#) section in this Guide.

IMPORT TEMPLATE MANAGEMENT

Once created, all import templates (including those that use a Fixed Length ASCII File template) are listed in the *Import Data* screen. To access the *Import Data* screen, refer to steps 1 through 4 in the [Defining an Import Template](#) section in this Guide.



To close the *Import Data* screen, click the **Close** button.

Add, Change, and Delete

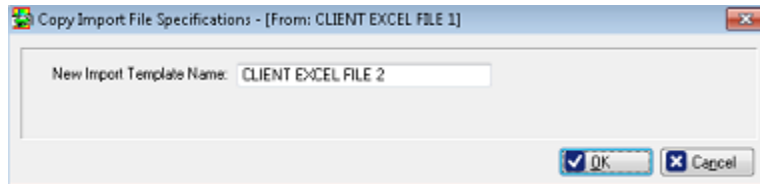
From this screen, import templates can be added, changed, or deleted by selecting/highlighting the specific template and clicking the appropriate command button.



Any time an import file template that uses a Fixed Length ASCII File template is deleted, the Fixed Length ASCII File Template is automatically deleted along with it. There is no confirmation or warning that the Fixed Length ASCII File template is also being deleted.

Copy Template

Import templates can also be copied to create new/additional templates by selecting/highlighting the template to be copied and clicking the **Copy Template** button. A *Copy Import File Specifications* dialog will display. The copy function will use the copied from template name and add a numerical identifier to it. Use the default template name or edit it as desired and click the **OK** button.



Fixed Length ASCII File Setup

From the *Import Data* screen, the creation and management of Fixed Length ASCII File templates is performed by clicking the **Fixed Length ASCII File Setup** button and displaying the Import Templates screen (refer to the [Fixed Length ASCII File Templates Management](#) section in this Guide for more information).

Import

An import can be performed using an existing import template by selecting/highlighting a specific import template and clicking the **Import** button.

Mapping the Fields

Once the template is defined, the next step is to map the fields between the sample file and the DAT-MAIL table for the template to use. All fields do not have to be assigned; however, both DAT-MAIL's Client and Permit tables have minimum requirements when it comes to field adding data to the table.

DAT-MAIL CLIENT TABLE

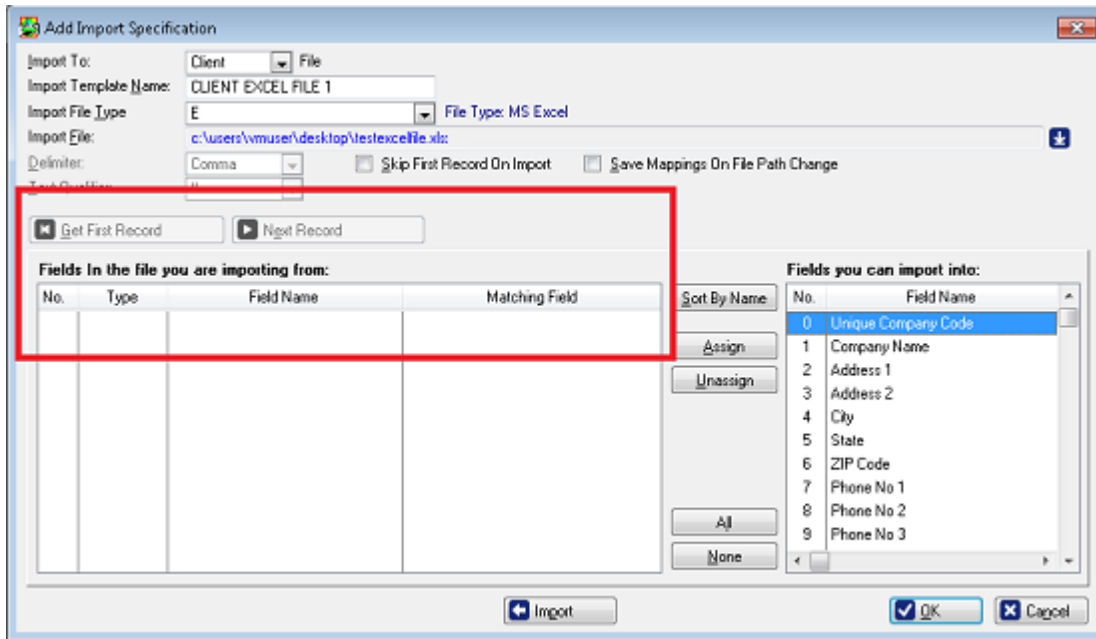
The two required fields for the DAT-MAIL Client table are the 'Unique Client Code' and the 'Company Name' fields, though Window Book strongly recommends also mapping the MID and/or CRID fields.

DAT-MAIL PERMIT TABLE

The required fields for DAT-MAIL's Permit table are the 'Permit Number' and the 'Post Office of Mailing ZIP+4' (which can be only 5 digits if that is all that is available).

To map the fields, perform the following:

1. At the time a file is selected to import (refer to step 8 within the [Defining an Import Template](#) section of this document), the first record contained in that file may automatically display in the window. If it does not, click the **Get First Record** button;



2. Click the **Next Record** button enough times to display multiple records – a decent representation of the data found in the file. This is especially important if the import file type selected is 'ASCII Fixed' since it will help confirm the field length is defined correctly (refer to the [Creating a Fixed Length ASCII File Template](#) section in this Guide);
3. If there are column headers in the import file, they will be displayed on the left or in the 'Field Name' column. The specified DAT-MAIL table's fields (in this example, Client table) will display on the far right under the heading "Fields you can import into:"



- A unique client identifier (e.g. account number, client code, record ID, etc.) must be mapped to DAT-MAIL's "Unique Company Code" field. This is accomplished by selecting (highlighting) DAT-MAIL's "Unique Company Code" field on the left, then selecting the corresponding field in the file being imported that is to act as the unique client identifier (e.g. 'Acct Number'), and clicking the **Assign** button. "=Unique Company Code (Field 0)" will display in the 'Matching Field' column;



At this time By/For Exchange and DAT-MAIL do not support international phone numbers (April 2015).

Fields In the file you are importing from:						Fields you can import into:	
No.	Type	Field Name	Matching Field	Sort By Name	No.	Field Name	
0	String	Acct Number	= Unique Company Code (Field0)	Assign Unassign	0	Unique Company Code	
1	String	Company Name			1	Company Name	
2	String	Address 1			2	Address 1	
3	String	Address 2		3	Address 2		
4	String	City		4	City		

- Map each field in the import file to its corresponding field in the DAT-MAIL table by highlighting each and clicking the **Assign** button;

Fields In the file you are importing from:						Fields you can import into:	
No.	Type	Field Name	Matching Field	Sort By Name	No.	Field Name	
0	String	Acct Number	= Unique Company Code(Field0)	Assign Unassign	0	Unique Company Code	
1	String	Company Name	= Company Name (Field1)		1	Company Name	
2	String	Address 1	= Address 1 (Field2)		2	Address 1	
3	String	Address 2	= Address 2 (Field3)	All None	3	Address 2	
4	String	City	= City (Field4)		4	City	
5	String	State	= State (Field5)		5	State	
6	String	ZIP	= ZIP Code (Field6)	6	ZIP Code		
7	String	MID	= MID (Field19)	7	Phone No 1		
8	String	CRID	= CRID (Field18)	8	Phone No 2		
9	String	CONTACT	= Contact Name 1 (Field12)	9	Phone No 3		
10	String	PHONE	= Phone No 1 (Field7)				

Assignments can be undone by clicking the **Unassign** button.

There are two sort options for the selected DAT-MAIL table. The default is by Field Number (i.e. "Field No."). The second sort option is by name. If the fields are sorted by number, the sort button's label will read "**Sort By Name**" (see image above). If the fields are sorted by name, the sort button label will read, "**Sort by No.**" Sort capabilities apply to the DAT-MAIL table only.

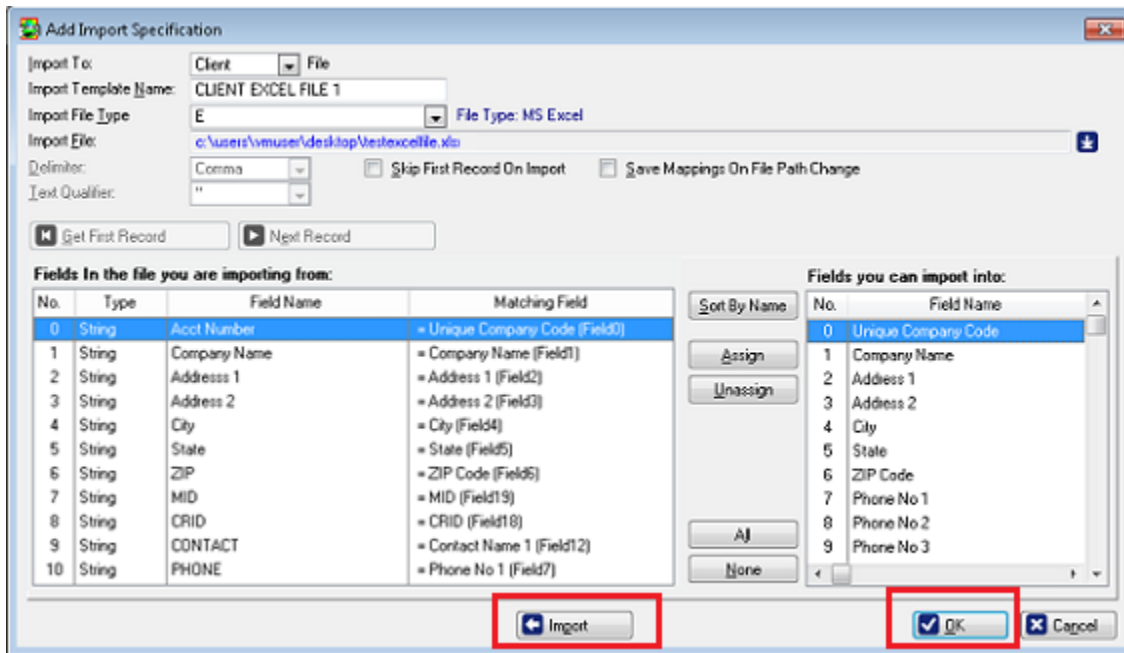
All of the fields in the import file can be assigned simultaneously to their line-item counterpart by clicking the **All** button (not recommended). If the fields in the DAT-MAIL table are sorted by number, import field number 1 will be assigned to table field number 1. If the fields in the DAT-MAIL table are sorted by name, import field number 0 will be assigned to whatever field is displayed in the 1st field of the DAT-MAIL table (not Field 0).

All assigned fields can be unassigned simultaneously by clicking the **None** button.

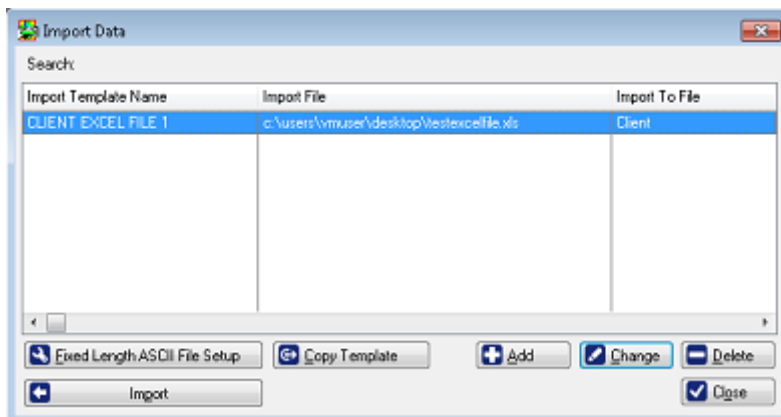
Assignments are singular. One import field cannot be assigned to multiple fields in the DAT-MAIL table and vice versa.

i Refer to the information provided under the [Mapping the Fields](#) header in this Guide for important information on field assignment requirements.

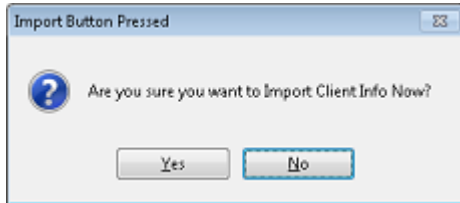
6. When finished mapping the fields, do one of two things:



- Click the **OK** button at the bottom of the screen to save the template without importing any data. The *Add Import Specification* screen will close and the *Import Data* screen will be displayed with the newly created "CLIENT EXCEL FILE 1" template listed; or



- Click the **Import** button which both saves the template and imports the data. When the **Import** button is clicked, an *Import Button Pressed* dialog is displayed asking the user to confirm whether or not they want to import the data. Click the **Yes** button to begin the import or click the **No** button to stop the import process.



If the **No** button is clicked, the *Import Button Pressed* dialog will close and the *Add Import Specification* screen will display.

If the **Yes** button is clicked, the import will commence, the *Add Import Specification* screen will close, and the *Import Data* screen will be displayed with the newly created "CLIENT EXCEL FILE 1" template listed.

The import is complete.

SETTING UP BY/FOR EXCHANGE EXPORT

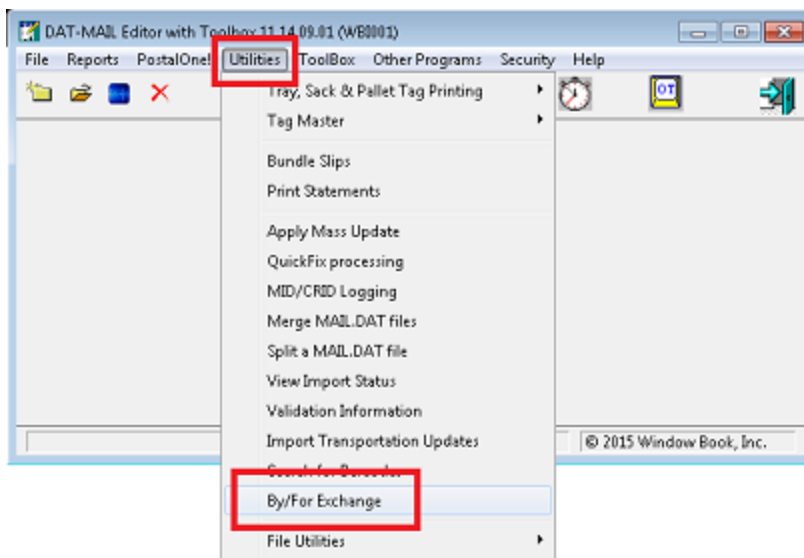
The data stored within DAT-MAIL's Client and Permit tables can also be exported from DAT-MAIL for use in other systems to assist in maintaining data integrity across a Client's platform.

The By/For Exchange utility is launched from DAT-MAIL's 'Utilities' menu and the Export function from within the Exchange utility. The creation of an export template is required to be used for the export process.

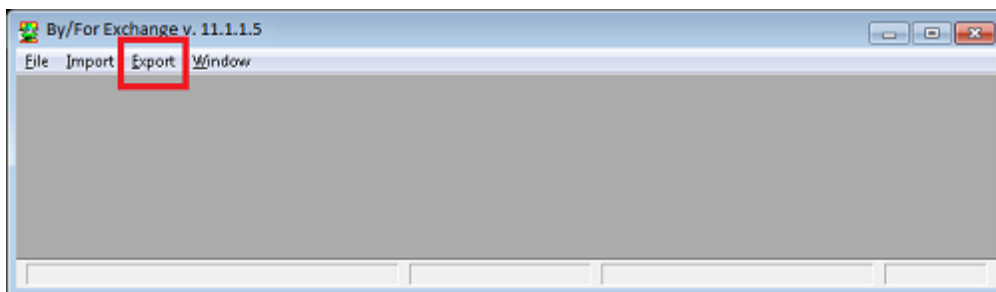
CREATING AN EXPORT TEMPLATE

To create an export template, perform the following:

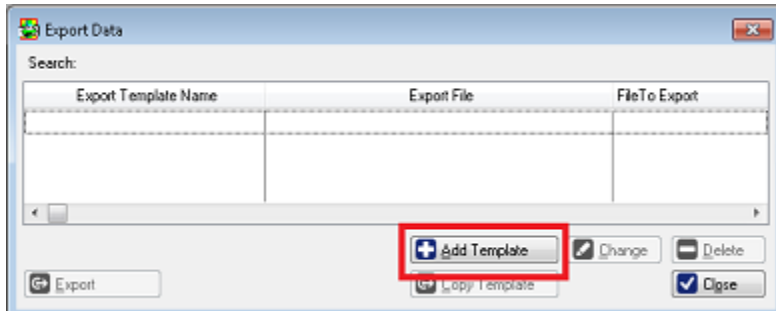
1. Launch DAT-MAIL. From DAT-MAIL's main screen, click the 'Utilities' menu, and select the 'By/For Exchange' option;



2. The *By/For Exchange* window will display. Click the 'Export' menu option;



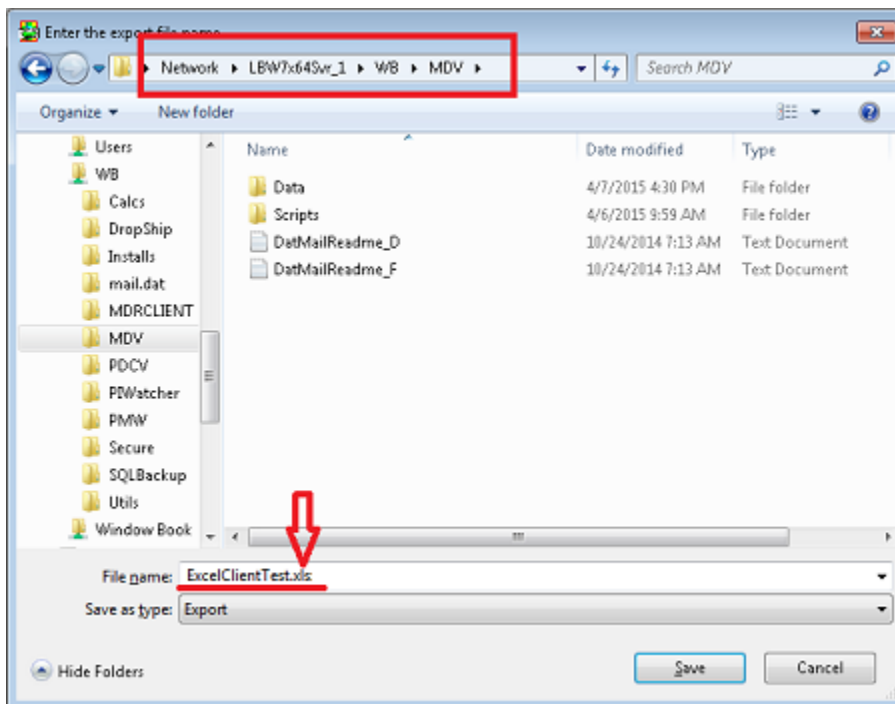
- The *Export Data* screen will display. Click the *Add Template* button to begin creating a new export template;



- The *Add Export Specification* screen will display:



- Export Template Name 1:** Enter a name for the template;
- Export File 2:** Click the down corresponding down arrow. A browse dialog will open. Choose a location where to save the export to, and enter a name for the file to be called. Add the appropriate file extension to the file name based on the file format to be used (i.e. .xls, or .txt);



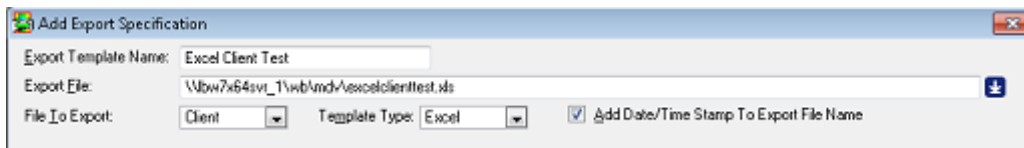


- **File To Export** ³: Clicking the corresponding down arrow, select which DAT-MAIL table to export from (i.e. Client or Permit);
- **Template Type** ⁴: Clicking the corresponding down arrow, select which type of file format to use for the template (i.e. Text or Excel);

i *The 'Text' template type pertains to both delimited and fixed length formats.*

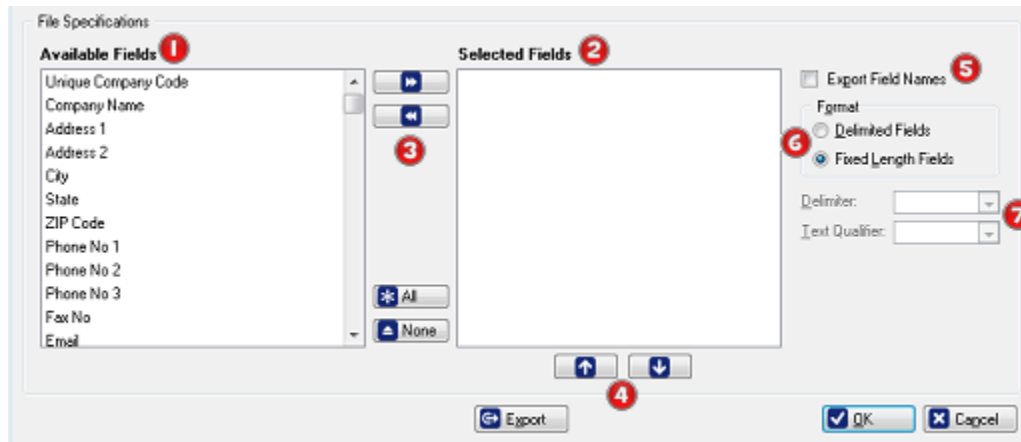
- **Add Date/Time Stamp to Export File Name** ⁵: Select (check) to enable this option of adding a date and time stamp to the export file name;
- **Append To Current File** ⁶: Select (check) this option to append the exported data to an existing file that uses the same name specified in the 'Export File' field (²) above. This option is only available if the 'Template Type' selected is "Text".

i *Since the 'Template Type' selected in the example being used here is "Excel", the 'Append to Current File' option no longer displays (is no longer available) in the screen image below.*



w *In a server with workstation(s) environment, use UNC path names when selecting the file location (see image above as an example, i.e. \\lbw7x64svr_1\wb\mdv\excelclienttest.xls).*

- Specify the fields from the DAT-MAIL table (i.e. Client or Permit) that are to be exported as part of the template:



One by one, single click or highlight the fields from the 'Available Fields' list **1** and copy them to the 'Selected Fields' list **2** by using the right or forward arrow button (the right/forward arrow, left/back arrow, All, and None buttons are noted with the **3** reference in the image above).

'Selected Fields' can be removed from the template by highlighting them and clicking the corresponding left or back arrow.

To easily select and copy all of the 'Available Fields' for the template, click the **All** button.

To easily remove all of the 'Selected Fields' at once, click the **None** button.

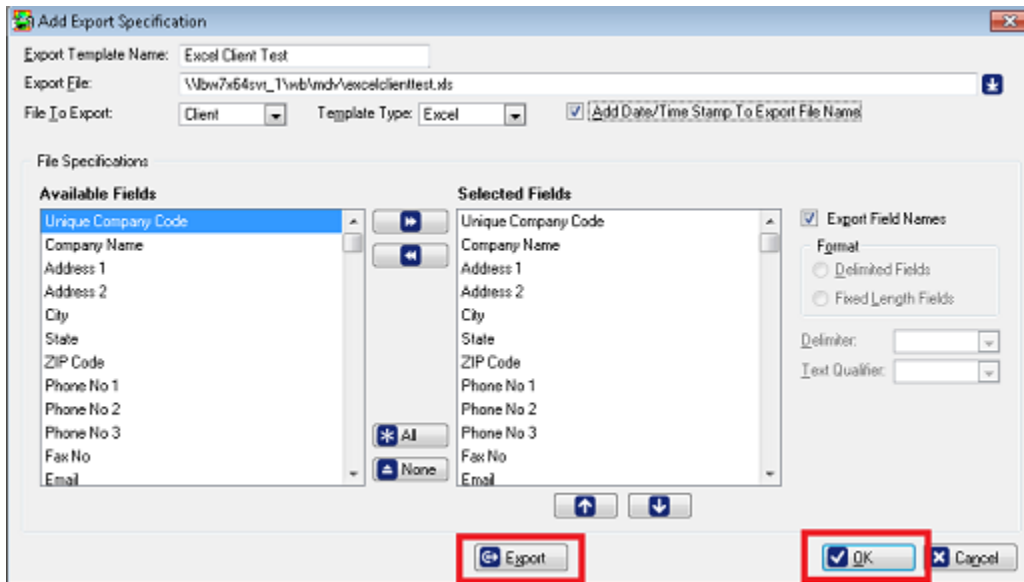
- Reference the image located under step 5 above and complete creating the template as follows:

- Export Field Names **5****: Select (check) this option to include the field name in the exported file (recommended).
- Format **6****: If the 'Template Type' selected is "Text", specify which format type the template should use, i.e. Delimited Fields or Fixed Length Fields. If the 'Template Type' selected is "Excel", the 'Format' fields would be unavailable (i.e. grayed out).
- Delimiter and Text Qualifier **7****: Using the corresponding drop down arrows, select the 'Delimiter' and 'Text Qualifier' the exported file should use if the 'Template Type' selected is "Text" and the 'Format' specified is "Delimited Fields".

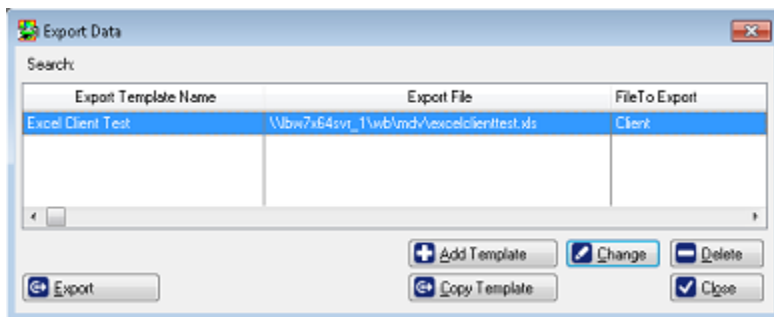
Both of these fields will be unavailable or grayed out if the 'Template Type' selected is "Excel".

Both of these fields will be unavailable or grayed out if the 'Template Type' selected is "Text" and the 'Format' selected is "Fixed Length Fields".

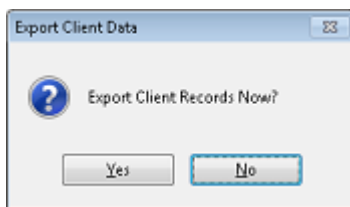
7. When finished creating the template, perform one of three options:



- Click the **OK** button to save the template without exporting any data. The *Add Export Specifications* screen will close and the *Export Data* screen will display with the newly created template listed;

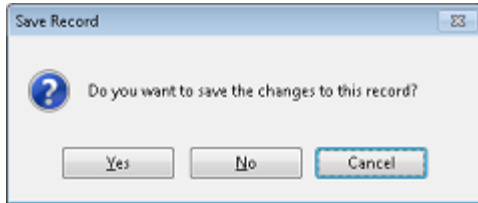


- Click the **Export** button to both save the template and perform an export of data to the file specified in the template. When the **Export** button is clicked a confirmation dialog will display. In the example being used here, the DAT-MAIL Client table was selected for export; therefore, the confirmation dialog displayed is the *Export Client Data* dialog.



- Click the **Yes** button to export the data, save the template, and close the Add Export Specification screen. The *Export Data* screen will display with the template listed.

- Click the **No** button. The confirmation dialog will close and the template is saved with no data exported. At this point, the *Export Data* screen will display with the template listed.
- Click the **Cancel** button on the *Add Export Specifications* screen. A *Save Record* dialog will display asking whether or not to save the record:

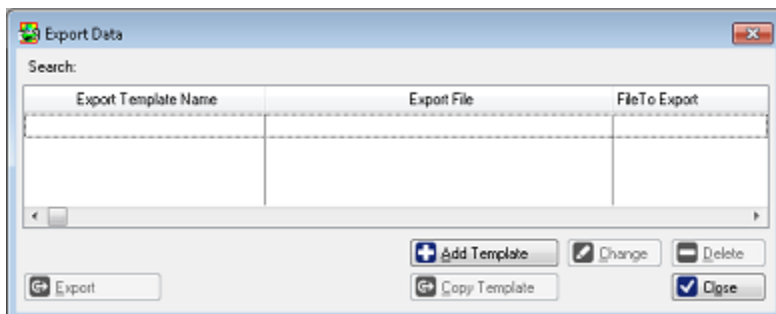


- Click the **Yes** button to save the template and close the *Add Export Specification* screen without exporting the data (the template will be listed in the *Export Data* screen);
- Click the **No** button to close the *Add Export Specification* screen without saving the template (all template information will be lost); or
- Click the **Cancel** button to return to the *Add Export Specification* screen.

The export process is complete.

Export Template Management

Once created, all previously created export templates and their associated files are listed in the *Export Data* screen. To access the *Export Data* screen, refer to steps 1 through 4 in the [Creating an Export Template](#) section in this Guide.



To close the *Export Data* screen, click the **Close** button.

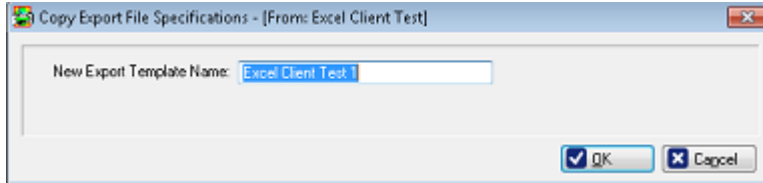
Add, Change, and Delete

From this screen, export templates can be added, and existing templates can be changed or deleted by selecting/highlighting the specific template and clicking the appropriate command button.

Copy Template

Export templates can also be copied to create new/additional templates by selecting/highlighting the template to be copied and clicking the **Copy Template** button. A *Copy Export File Specifications* dialog

will display. The copy function will use the copied from template name and add a numerical identifier to it. Use the default template name or edit it as desired and click the **OK** button.



Export

An export of data can be performed using an existing export template and file by selecting/highlighting a specific export template and clicking the **Export** button.

USING THE COMMAND LINE

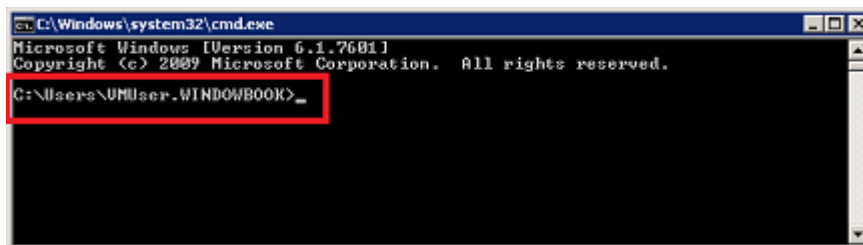
The By/For Exchange utility can be run using the command line on a computer or server once the corresponding import or export template(s) is already defined. This can be useful if the import or export is being done as part of an automated process.

To use the command line to run the By/For Exchange utility, perform the following:

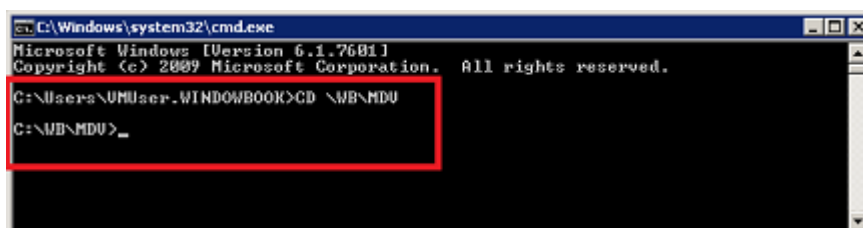
1. Determine the name of the existing import or export template to be run.
2. On the computer or server where DAT-MAIL is installed, click the **Start** button and in the search line or window, type "cmd" and press **Enter** on the keyboard.



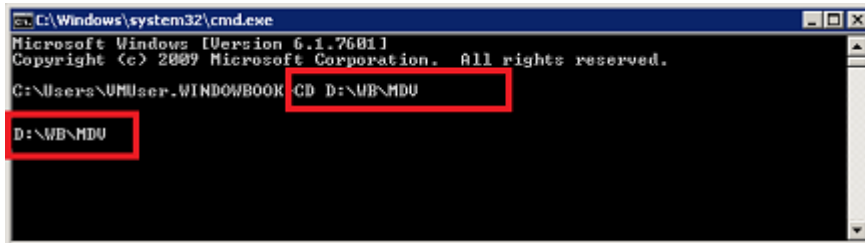
3. A *Command Prompt* screen (DOS window) will display. Change the current directory (e.g. 'C:\Users\VMUser.WINDOWBOOK') to the directory where the By/For Exchange utility resides. The name of the utility is "ByForManager" and is located in the 'MDV' directory which is created during the installation of DAT-MAIL. In a standard installation, the 'MDV' directory is located in the 'WB' directory (i.e. '\\...WB\MDV'), which is also created during the installation of DAT-MAIL.



In the example being used here, the "WB\MDV" folders are also located on the C: drive, so the drive will remain the same. Type "CD \WB\MDV" (there should be a space between "CD" and "\WB\MDV") and press Enter. The directory should change to: "C:\WB\MDV>".



If the '\WB\MDV' directories reside on a drive other than what is displayed (e.g. a drive other than C:), make sure to include the drive letter when changing directories (i.e. "CD D:\WB\MDV" – there should be a space between "CD" and "D:\WB\MDV") and press Enter.



```
Microsoft Windows [Version 6.1.7601]
Copyright (c) 2009 Microsoft Corporation. All rights reserved.

C:\Users\UMJUser.WINDOWBOOK>CD D:\WB\MDV

D:\WB\MDV
```

4. Run the utility from the command line and perform the import or export by typing the following one of the following commands:

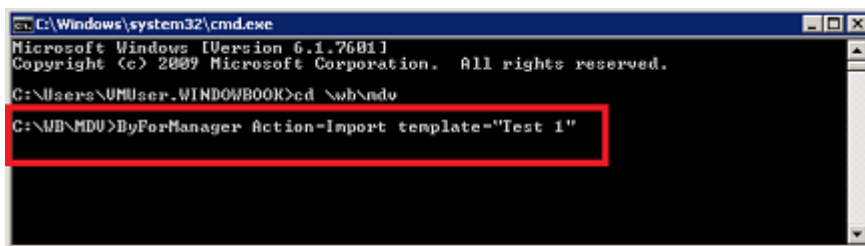
IMPORT: *ByForManager Action=Import template="existing import template name";* or

EXPORT: *ByForManager Action=Export template="existing export template name".*



A single space should occur between "ByForManager" and "Action"; and "Action=Import" and/or "Action=Export" and "template". Double quotation marks should always be used when entering the template name, and there should be no space between the equal sign (i.e. '=') and the name of the template.

In other words, if the process to be run is an existing import template named "Test 1", the command entered would be: *ByForManager Action=Import template="Test 1"*.



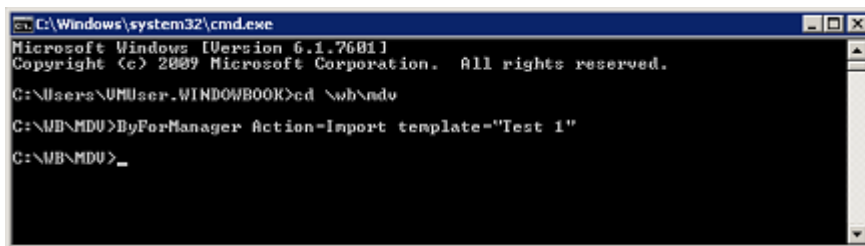
```
Microsoft Windows [Version 6.1.7601]
Copyright (c) 2009 Microsoft Corporation. All rights reserved.

C:\Users\UMJUser.WINDOWBOOK>cd \wb\ndv

C:\WB\MDV>ByForManager Action=Import template="Test 1"
```

Press **Enter** to run the command and import (or export) the data.

5. The screen will update displaying the current directory information.



```
Microsoft Windows [Version 6.1.7601]
Copyright (c) 2009 Microsoft Corporation. All rights reserved.

C:\Users\UMJUser.WINDOWBOOK>cd \wb\ndv

C:\WB\MDV>ByForManager Action=Import template="Test 1"

C:\WB\MDV>
```


No confirmation notifying the user that the process finished (or did not finish) will display.

If the action taken was an import, the user can view the contents of the 'Client List (Mail Owners)' table in DAT-MAIL to confirm the import completed successfully.

