

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.

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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

K At this time By/For Exchange and DAT-MAIL do not support international phone numbers (Feburary 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 <u>before</u> 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.

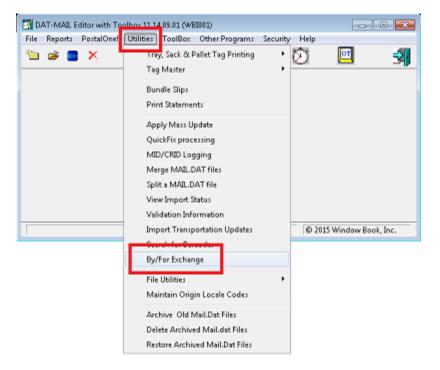
If the format type of the sample and subsequent production files being used to import data is <u>NOT</u> ASCII Fixed Length, creating a Fixed Length template is <u>not</u> necessary. Proceed to the <u>Defining an Import</u> <u>Template</u> section in this Guide for instructions on how to use the By/For 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 <u>Mapping the Fields</u> section in this Guide.

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

- 1. Launch DAT-MAIL;
- 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.



5. From the Import Data screen, click the Fixed Length ASCII File Setup button;

a Import Data		
Search:		
Import Template Name	Import File	Import To File
	-	
Exed Length ASCII File S	etup 🔄 Copy Template	dd 🛛 🖉 Change 🗖 Delete
Import		Close

6. 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;

Search:		
Template Name	Import File Path	Import Type
4		
Copy Template	mport File	Add Change Delete

- 7. 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);
- 8. 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;

1	🛃 Change Import	Template	×
	Template Name:	ASCII FIXED TEST 5	
	Import File:	c:/users/vmuser/desktop/asci_test.txt	
	Include The Taxa	C. U. J. C. U. Evidi D. William Colic	THE OWNER HERE AND
			- Tut

9. 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).

월 Add Import Ten	nplate				×
Template Name:	ASCII FIXED TEST 5				
Import Eile:	c:\users\vmuser\desktop	p\asci_test.bit			
Import File Type:	Fixed Length Fields 🚽	End Of Record Identifier:	LF	-	Skip First Record
Delimiter:	¥	Field Count:	0		
Text Qualifier:		Record Length:	0		

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;

emplate Name:	ASCII FIXED T	EST 5			
mport <u>F</u> ile:	a: \users \vmuser \desktop \asai_test.txt				
mport File Type:	Fixed Length F	ields 🚽 End	Of Record Identifier:	LF 💌	Skip First Record
)elimiter:		- Field	Count	0	
[ext Qualifier:		- Reci	and Length:	0	
Import Fiel		Field Type			

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

emplate Name:	ASCII FIXED TE	ST 5				
mport <u>F</u> ile:	c:\users\vmuser\desktop\ascij_test.txt					
mport File Type:	Fixed Length Fie	elds 🖵 End	Of Record Identifie	ec LF 📼	Skip First Record	
2elimiter:		- Field	i Count:	0		
[ext Qualifier:		- Rec	ord Length:	0		
Import Fie	ld Name	Field Type	Length	Field Format	Decimal Places	



12. An Insert Field Info screen will display:

Eield Name:	1	
<u>Т</u> уре:	String 💌	
Length:	0	
Eormat:		
Decimal Places:	0 🚖	

- **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;
- o 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;

🚼 Insert Field Info	. 🖻	3	🔛 Insert Field Info)		×
Field Name:			Field Name:	_	_	
<u>Type:</u>	Number		<u>I</u> ype:	Date		
Length:	15		Length	10		
Eormat:	No decimal		Eomat:	MM/DD/mm	6	-
Decimal Places:	No decimal		Decimal Places:	MMDDYY		
	Has decimal			MMDDYYYYY		
	Implied decimal			YYMMDD		X Cancel
	Cancel			YYYYMMDD		Cancel
				MM/DD/YY		
				MM/DD/mm	(
				DD-MMM-YY		

- 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.



15. 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.

16. 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;

Iemplate Name: Import File: Import File Type: Definite: Iext Qualifie:	ASCII FIXED	Fields - End (lest.txt DIRecord Iden Count: and Length:	tiler: CRLF 💌	Le Skip First Record
Import Fiel	ld Name	Field Type	Length	Field Format	Decimal Places
FIELD 1		String	6		
FIELD 2		String	7		
FIELD 3		String	23		
FIELD 4		String	3		
FIELD 5		String	5		
FIELD 0		String	50		
Move Up	Move Dow	n	View Record	te Add	Dhange Delete QK X Cagcel

17. 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;

chi		
Template Name	Import File Path	Import Type
SCILFIXED TEST 5	c:\users\vmuser\desktop\ascii_test.txt	Fixed Length Fields
est	c: \users \vmuser\desktop\asci_test.txt	Fixed Length Helds
	·	·
Copy Template	Import File	🗹 Add 💦 🚺 Change 🗖 🗖 🖸
⊻iew Records		Z 0

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

18. 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 <u>Getting</u> <u>Started</u> section in this Guide for further clarification). The new import template being created will use the newly created Fixed Length ASCII File template.

🛂 Import Data		*
Search		
Import Template Name	Import File	Import To File
CLIENT EXCEL FILE 1	c:/users/vmuser/vdesktop/vtestexcelfile.xlst	Client
* 🗆		
Exed Length ASCII File Setup	🔄 Copy Template 💽 Add	<u>Change</u> <u>Delete</u>
Imgort		Close

19. 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").

월 Add Import Specific	ation	
Import Ta:	Client 💌 File	
Import Template Name:	ASCII FMED TEST 5	
Import File <u>Type</u>	D File Type: Comma Delimited Text	
Import Eile:	c:/users/vmuser/desktop/ascii_test.txt.csv	
Delimiter:	Comma 💽 Skip First Record On Import 📃 Save M	fappings On File Path Change
Text Qualifier:	·· •	

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;

Fixed Ler	ngth ASCII	23
?	Do want to review and/or modify the Fixed Length layout for the selected file?	,
	Yes No	

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.

🛃 Add	Import Specifi	cation								×
Import F Import <u>F</u> Definite Lext Qu	Template <u>N</u> ame: File <u>T</u> ype File: H:	Client File ASCII FIXED TEST 5 D c:\users\vmuser\deskh Comma " Ngst Record	Skip Firs	File Type: Comma De csv I Record On Import		opings On File Pat	n Char	9°		ł
Field	is In the file yo	ou are importing from:					Field	ls you can import into:		
No.	Type	Field Name		Matching Field	t I	Sort By Name	No.	Field Name		*
1	String	FIELD 1					0	Unique Company Code		
2	String	FIELD 2				Assign	1	Company Name		
3	String	FIELD 3				Unassign	2	Address 1		
4	String	FIELD 4				<u>Grang</u> r	3	Address 2		
5		FIELD 5					4	City		
6		FIELD 6					5	State		
0		FIELD 0					6	ZIP Code		
<u> </u>							7	Phone No 1 Phone No 2		
						AJ	9	Phone No 3		
						None	1			-
									,	
				Import				<mark>₩</mark> <u>0</u> K	🔀 Cano	xel

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 <u>Mapping the Fields</u> 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 <u>Creating an Fixed Length ASCII</u> <u>File template</u> section in this Guide.

earch:		
Template Name	Import File Path	Import Type
•		
	mport File	🖉 Add 🛛 🖉 Dhange 💭 Delete

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.

Copy Import File Specification	ins - [From: CLIENT EXCEL FILE 1]	ĺ
New Import Template Name:	CLIENT EXCEL FILE 2	

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.

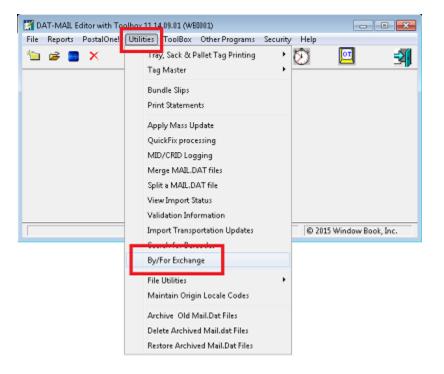
Before proceeding, determine what format the sample file to be used is. If the format type of the sample file is an ASCII Fixed Length file, ignore this section and go to the <u>Creating a Fixed Length ASCII File</u> <u>Template</u> section in this Guide.

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;





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. Click the **Add** button;

🛃 Import Data		
Search:		
Import Template Name	Import File	Import To File
< 🗌		
Exed Length ASCII File Se	tup 🔄 Copy Template	Add Change Delete
Import		Close
Les mgor		Close

5. 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;

🛂 Add	Import Specifi	cation					×
Import 1	ία femplate <u>N</u> ame:	Client 💌 File					
	ile ∐ype	D	File Type: Comma Delimited Text				
Import j	-						Ŧ
Delimite Lexit Qu		Comma 💌	Skip First Record On Import Save M	appings On File Pati	h Uhar	nge	
H <u>G</u>	st First Record	Next Record					
Field	s In the file y	ou are importing from:			Field	ds you can import into:	
No.	Туре	Field Name	Matching Field	Sort By Name	No.	Field Name	<u>^</u>
					0	Unique Company Code	
				Assign	1	Company Name Address 1	
				Unassign	3	Address 2	
					4	City	
					5	State	
					6	ZIP Code	
					7	Phone No 1 Phone No 2	
				AļI	8	Phone No 2 Phone No 3	
				None	1		
			Import				Capcel



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

🛂 Add Import Specific	ation				×
Import To:	Cleart	E File			
Import Template Name:		Land .			
unbourne The	U		💌 🗤 Type: Comma D	elimited Text	
Import File:					•
Delimiter:	Comma		Skip First Record On Import	Save Mappings On File Path Change	
Text OverHeet					

- 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 <u>Creating a Fixed Length ASCII File Template</u> section in this Guide.

• E (MS Excel); and

i

• **D** (ASCII Delimited).

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

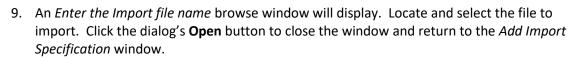
In the example being used here, 'E' for MS Excel is selected;

월 Add Import Specifi	cation	×
Import To: Import Template Name	Client File	
Import File Type	E File Type: MS Excel	_
Delimiter:	Comma 🔍 🔲 Skip First Record On Import 📄 Save Maccino: On File Path Change	E

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

🛂 Add Import Specific	ation	×
jmport To: Import Template <u>N</u> ame: Import File Turpe	Clent File CLENT EXCEL FILE 1 File File File File File File File File	
Import File:		•





월 Enter the Import	t file name		.
	isktop 🕨	✓ 4y Search Desktop	٩
Organize 🔻	New folder	88 - 🗍	0
🛛 🔆 Favorites	; Libraries 👔 vmuser		
 Libraries Methods Methods Computer 	Computer		
Þ 📬 Network			
	File name: TestExcelFile.xls	Excel (xds)	•

K 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.

Import T	emplate 23
<u> </u>	The import file type: 'PDF' cannot be imported! Please reselect the import file.
	OK

owBook

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

S Add Import Specific	ation	×
jmport To: Import Template <u>N</u> ame:	Client File CUENT EXCEL FILE 1	
Import Template Name: CLIENT EXCEL FILE 1 Import File: c:\users\vmuser\desktop\testexcetile.xts>		
Zennier. Tast Osaffan	2Aprila 2Aprila neccio orninpoli 2ave Mappings on rie Famichange	



 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);

Add Import Specific Import Toc Import Template Name:	Client File CLIENT EXCEL FILE 1	1 File Type: Comma Delimited Text	
Import File Type	D	🖌 File Type: Comma D	elimited Text
Definite: Levil Quanter:	Comme 💌 Comme Tab	Skip First Record On Import	🔲 Save M

12. Then select the correct text qualifier (i.e. ", ', or 'None')

🛂 Add Import Specific	ation		
jmport To: Import Template <u>N</u> ame: Import File Type	at To: Client File at Template Name: CLIENT EXCEL FILE 1 at File Type D File Type: Comma Delimited Text at File: at File		
Import Eile:			
Delimiter I ext Qualifier:		Skip First Record On Import	📃 <u>S</u> ave Ma
Get First Record	-	ı	
Fields In the file y	unione n:	Matshine Fi	-14

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

Import To:	Client	💌 File			
Import Template Name:	CLIENT EX	CEL FILE 1			
Import File Type	E			File Type: MS Excel	
Import File:	c:\users\w	m polida k	top/testexcelfile.	de	
Delimiter:	Comma	-	📃 <u>S</u> kip Fir	t Record On Import	
Test Qualifier:					

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

Delimiter: Comma 👻 📄 Skip First Record On Import 📄 Save Mappings On File Path Change	*			
		1		
Import To: Client File Import Template Name: CLIENT EXCEL FILE 1 Import File Type: MS Excel Import Eile: c:\users\vmuser\desktael.lasteuceRize.uku				
Import File:	c:\users\vmuser\desl	taal taatamaa Maximu		*
Delimiter:	Comma 👻	Skip First Record On Import	Save Mappings On File Path Change	
Text Qualifier:	н			
E Get First Record	Ngst Rec	brd		



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;

🛂 Add Import Specific	ation	×
jmport To: Import Template <u>N</u> ame:	Client File CLIENT EXCEL FILE 1	
Import File Type	E File Type: MS Excel	
Import File:	c:/users/vmuser/desktop/testexcetile.xks	•
Delimiter:	Comma 🚽 📃 Skip First Record On Import 📃 Save Mappings On File Path Change	
Test Qualifier:		
Get First Record	Next Record	
Let First Hecord	Ngw Hecord	

15. The next step in setting up the import template is mapping the fields. To do this, proceed to the <u>Mapping the Fields</u> 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 <u>Defining an Import Template</u> section in this Guide.

Import File	emplate Name Import File	Import To File		
Copy Template	ed Length ASOI File Setup	Change 🗖 D		

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.

😼 Copy Import File Specificatio	ins - [From: CLIENT EXCEL FILE 1]	X
New Import Template Name:	CLIENT EXCEL FILE 2	
		Capcel

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 <u>Fixed Length ASCII File Templates Management</u> 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:

 At the time a file is selected to import (refer to step 8 within the <u>Defining an Import</u> <u>Template</u> 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;

월 Add In	nport Specifi	cation					×
Import Te Import File	mplate <u>N</u> ame: e <u>T</u> ype	E c:\users\vmuser\desktop\te		appings On File Pat	h Char	nge	0
		Ngst Record			Field	fe nou can import into:	
			Matching Field	Sort Bu Marra	-	-	-
140.	13400	1 Kond Pedalito	Matching Field	200 by Mane	0		
				Assign	1	Company Name	
				Heassign	2	Address 1	
	ot To: Client File ot Templete Name: OUENT EXCEL FILE 1 ot File Type: MS Excel ot File: c-\users\vmuser\desktop\testexcelfile.xk: mite: Comma V Skip First Record On Import Get First Record Next Record Else In the file you are importing from:		Drassign	3	Address 2		
				4	City		
				5	State		
Japot To: Dient File Inpot Template Name CUENT EXCEL FILE 1 Inpot File Jupe E Impot File Jupe E Impot File: c:/users/vmuse/idesktop/testexcelile.xls: Definite: Comma Impot File: Impot File: Impot File: Impot File: Impot File: Impot File: Impot File: Impot File:							
					1.1		
				AJ			
				Nee		Phone No 3	
				Houe	•		
			Imgort				Cagoel

- 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 <u>Creating a Fixed Length ASCII File Template</u> 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:"

Fields In the file you are importing from:		you are importing from:			Field	s you can import into:	
No.	Туре	Field Name	Matching Field	Sort By Name	No.	Field Name	^
0	String	Acct Number			0	Unique Company Code	
1	String	Company Name		Assign	1	Company Name	
2	String	Addresss 1		Unassign	2	Address 1	



4. 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.	Туре	Field Name	Matching Field	Sort By Name	No.	Field Name	^
0	String	Acct Number	= Unique Company Code (Field0)		0	Unique Company Code	
1	String	Company Name		Assign	1	Company Name	
2	String	Addresss 1		Unassign	2	Address 1	
3	String	Address 2		Qridssign	3	Address 2	
4	String	City			4	Civ.	

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

No.	Type	Field Name	Matching Field	Sort By Name	No.	Field Name		_
0	String	Acct Number	= Unique Company Code(Field0)		0	Unique Company Code		
1	String	Company Name	= Company Name (Field1)	Assign	1	Company Name		L
2	String	Addresss 1	= Address 1 (Field2)	Unancian	2	Address 1		L
3	String	Address 2	= Address 2 (Field3)	Unassign	3	Address 2		L
4	String	City	= City (Field4)		4	City		L
5	String	State	= State (Field5)		5	State		L
6	String	ZIP	= ZIP Code (Field6)		6	ZIP Code		L
7	String	MID	= MID (Field19)		7	Phone No 1		L
8	String	CRID	= CRID (Field18)		8	Phone No 2		L
9	String	CONTACT	= Contact Name 1 (Field12)	AļI	9	Phone No 3		L
10	String	PHONE	= Phone No 1 (Field7)	None	<		>	t

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.

Refer to the information provided under the <u>Mapping the Fields</u> header in this Guide for important information on field assignment requirements.

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

lowBook

port port ofinite of the	Template <u>N</u> ame File <u>T</u> ype Eile:	E c:\users\vmuser\desktop\teste		Mappings On File Pat	h Char	nge	0
ield	s In the file y	ou are importing from:			Field	ls you can import into:	
No.	Type	Field Name	Matching Field	Sort By Name	No.	Field Name	1
0	String	Acct Number	= Unique Company Code (Field0)		0	Unique Company Code	
1	String	Company Name	= Company Name (Field1)	Assign	1	Company Name	
2	String	Addresss 1	= Address 1 (Field2)	Unassign	2	Address 1	
3	String	Address 2	= Address 2 (Field3)	Dugssign	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	
	String	CONTACT	= Contact Name 1 (Field12)	AJ	9	Phone No 3	
9		PHONE	= Phone No 1 (Field7)	None		1	

 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

Search		
Import Template Name	Import File	Import To File
CUENT EXCEL FILE 1	c./users/vmuser/desktop/testexcelfile.xls	Client
•		
Sized Length ASCII File Se	stup 💽 Copy Template 💽 Add	🚺 🚺 Change 🔲 Delete
C Import		Close



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.

Import B	atton Pressed	3
0	Are you sure you want to Import Client Info Now?	
	Yes No	

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;

🚼 DAT-MAIL Editor with To	olbox 11 14 09.01 (WB0001)	- • 💌
File Reports PostalOne!	Utilities ToolBox Other Programs Security	Help
10 🖻 🖀 🗙 🔤	Tray, Sack & Pallet Tag Printing	🕅 🛄 🕅
	Bundle Slips Print Statements	
	Apply Mass Update QuickFix processing MID/CRID Logging Merge MAIL.DAT files Split a MAIL.DAT file View Import Status	
	Validation Information Import Transportation Updates	© 2015 Window Book, Inc.
	By/For Exchange	
	File Utilities	

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

By/For Exchange v. 11.1.1.5		
Eile Import Export Window		
	2	



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

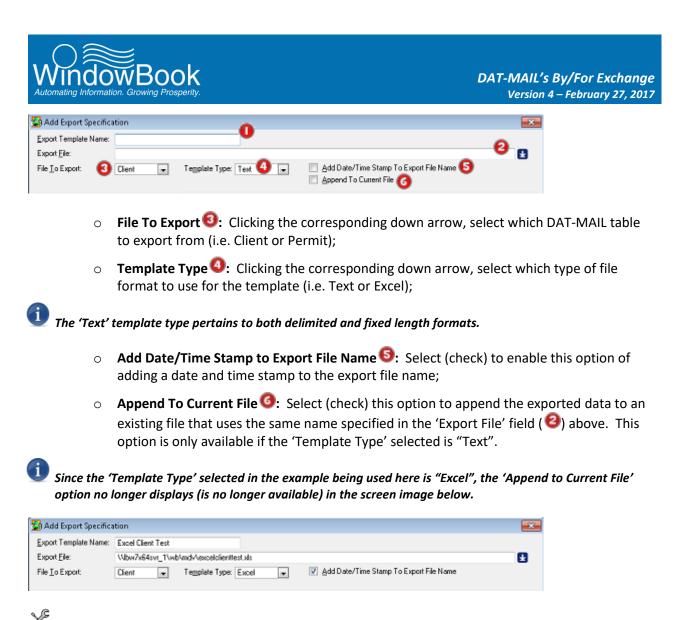
h:		
Export Template Name	Export File	FileTo Export

4. The Add Export Specification screen will display:

🚰 Add B	port Specific	ation		•				X
Export T	emplate Name:						0	
Export E	le:				_		9	•
File <u>I</u> o E	xport: 🔞	Client	▼ Ten	plate Type: Text 🤇	4 .	Add Date/Time Stamp To Export File Name Append To Current File		

- **Export Template Name** : 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);

Enter the export file name			ж
G v III + Network → LBW7x64Swr_1 → WB → MDV →	▼ ⁴ y Search MDY		P
Organize 👻 New folder		8== •	0
Users Name W8 Data Calcs Scripts Installs DetMailReadme_D MDRCLIENT DatMailReadme_F MDV DatMailReadme_F MDV DatMailReadme_F MDV DatMailReadme_F SQLBackup Utils Window Book Utils	Date modified 4/7/2015 4:30 PM 4/6/2015 9:59 AM 10/24/2014 7:13 AM 10/24/2014 7:13 AM	Type File folder File folder Text Document Text Document	
File name: ExcelClientTest.vls Save as type: Export	Save	Cancel	•



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).



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

Unique Company Code	A []	Export Field Names 5
Company Name		Format
Address 1		Delimited Fields
Address 2	8	Fixed Length Fields
City	-	
State		Delimiter: v
ZIP Code		I est Qualifier.
Phone No 1		Terr deserter
Phone No 2		
Phone No 3	AI SA	
Fax No		
Email	- None	
		P
	Export 4	Capcel

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.

- 6. Reference the image located under step 5 above and complete creating the template as follows:
 - **Export Field Names** Select (check) this option to include the field name in the exported file (recommended).
 - Format³: 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 2: 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:

🚰 Add Export Specifica	ition			
Export Template Name:	Excel Client Test			
Export Eile:	\\bw7x64svt_1\wb\mdy\exc	elclienttest.xls		•
File To Export:	Client Templat	e Type: Excel 📼	Add Date/Time Stamp To E	xport File Name
File Specifications Available Fields		Selected F	ield:	
Unique Company Cox	że 🔺	Unique Con	pany Code	 Export Field Names
Company Name		Company N	ame .	Format
Address 1		Address 1		 <u>D</u>elimited Fields
Address 2		Address 2		Fixed Length Fields
City		City		
State		State		Delimiter:
ZIP Code		ZIP Code		Text Qualifier:
Phone No 1		Phone No 1		
Phone No 2		Phone No 2		
Phone No 3		Phone No 3		
FaxNo		A None Fax No		
Email	-	Emai		*
		💽 Eggo	et	Cagoel

 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;

🛂 Export Data		×
Search		
Export Template Name	Export File	FileTo Export
Excel Client Test	Wbw7x64svr_1\wb\mdv\excelclienttest.xls	Client
•	1	•
	💽 Add Template	Change Delete
Export	Copy Template	Cigoe

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.

Export Cl	ient Data	23
?	Export Client Records Now?	
	Yes No)

 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:

Save Rec	ord	23			
Do you want to save the changes to this record?					
	Yes No Cancel				

- 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 <u>Creating an Export</u> <u>Template</u> section in this Guide.

sarch:			
Export Template Name	Export File	FileTo Export	
	🚺 édd Template	Dhange Dele	

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.

Copy Export File Specifications - [From: Excel Client Test]						
New Export Template Name: Excel Client Text 1						
	🔽 QK 🛛 🔀 Capcel					

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

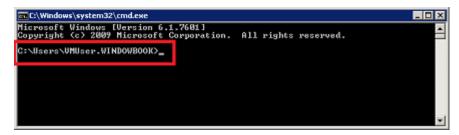
The By/For Exchange utility can be run using the command line on a computer or server once the corresponding import or export template(s) is already defined. This can be useful if the import or export is being done as part of an automated process.

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.

cmd	×
Start	

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>".

C:\Windows\system32\cmd.exe		
Microsoft Windows [Version 6.1.7601] Copyright (c) 2009 Microsoft Corporation.	All rights reserved.	^
C:\Users\UMUser.WINDOWBOOK>CD \WB\MDU		
C:\VB\MDU>_		
		-



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.

C:\Windows\system32\cmd.exe	- D X
Microsoft Windows [Version 6.1.7601] Copyright (c) 2009 Microsoft Corporation. All rights reserved.	^
C:\Users\VMUser.WINDOWBOOK CD D:\WB\MDU	
D:\WB\MDV	
	-1

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".

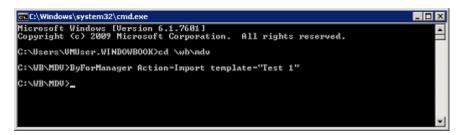
A single space should occur between "ByForManager" and "Action"; and "Action=Import" and/or "Action=Export" and "template". Double quotation marks should always be used when entering the template name, and there should be no space between the equal sign (i.e. '=') and the name of the template.

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"*.

gn C:\Windows\system32\cmd.exe	_ D X
Hicrosoft Windows EVersion 6.1.7601] Copyright (c) 2009 Microsoft Corporation. All rights reserved.	-
C:\Users\UMUser.WINDOWBOOK>cd \wb\mdv	
C:\WB\MDU>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.





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.

ピ D	AT-MAIL Editor with	Toolbox 11.	15.00	3.02 (WE	1001)				_ 🗆 🗙
File	eports PostalOne!	Utilities To	Box	Other P	rograms	Security He	lp l		
_	www.Mail.Dat.Import	Ctrl-Insert		ø	Postage	Tags 3602	í 🕋	OT	-51
	Open Mail.Dat File	Ctrl-Enter	ŀ		Rpts				-90
	Delete Mail.Dat File	Ctrl-Delete							
	Delete Multiple Mail.Dat Files								
	Export Mail.Dat File								
		rs)	_						
	Client List (Mail Owners)								
	Tob List								
	Permit List								
	Publication List								
	Lot/String/Panel Info							© 2015 Wir	ndow Book, Inc.
	Client Communication Lis	t t							
	Carrier List								
	CAPS List								
	DMU List								
	Transportation Schemes		_						
	Distribution Center List								
			_						
	Program Settings		1						
	Printer Setup								
	Exit	Ctrl-X							