

DAT-MAIL & Truck Direct Mail



User Guide

Version 3, Created August 10, 2018

ABOUT THIS GUIDE

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REVISION HISTORY

This section contains a list of any significant changes that were made from the previously published version of this Guide, including a brief description of the change, the type of change made (i.e. Revision, New, or Deletion), a link to the location in the Guide where the change occurred, and any pertinent details relating to the change.

CHANGE	TYPE	LOCATION IN GUIDE	DETAIL
Updated section	Revision	CREATE NEW TDM QUOTE	Removed Info note located at the beginning of the section that had to do with pallet-level quoting.
Updated section	Revision	COMPONENT DESCRIPTION & USE	Updated section to identify two different types of TDM quotes (DAT-MAIL version 20.18.6.15).
Added section	New	QUOTES FOR A SINGLE FILE	Added section to differentiate between entry point level quotes and pallet level or pooled quotes (DAT-MAIL version 20.18.6.15).
Renamed section	Revision	Was: "Create New TDM Quote" Now: Create Quote From A Single File	Renamed section due to introduction of TDM Pooled Quotes (DAT-MAIL version 20.18.6.15).
Updated section	Revision	Create Quote From A Single File	Added information about new dialogs that will display if entry points are selected that don't have trays associated with them. Added an Information note explaining that quotes are only provided for pallets. Loose trays and sacks will not be included in quotes. Added information about selecting a specific mail date field when requesting a quote.
Added Section	New	TDM POOLED QUOTES	Added information pertaining TDM Pooled Quotes – new functionality added with the release of DAT-MAIL version 20.18.6.15.

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BEFORE YOU BEGIN

SYMBOLS YOU SHOULD KNOW

The following symbols appear throughout this document:



Where displayed, this Information icon denotes important information regarding the subject matter at hand. The information is intended to provide helpful hints, references to other locations in the document to help further understanding about the current subject-matter, and/or include special requirements pertaining to specific subject-matter. It is important that the information provided be read and thoroughly understood before proceeding.



Where displayed, this Attention icon is intended to make the reader take special notice as the information provided is critical in nature to the subject matter at hand. It is not intended to lessen the importance of the information provided with the Information icon noted above; but to bring additional attention in situations of extreme necessity.



Where displayed, this Troubleshooting icon denotes helpful hints and tips for the subject matter at hand. The information in the troubleshooting tip is intended to provide helpful hints and resolutions for some of the more common issues that can occur during operation.

PURPOSE

The purpose of this Guide is to provide use instructions for the TDM® (i.e. Truck Direct Mail®) feature available in DAT-MAIL™. No installation is required. Existing DAT-MAIL users will have access to this integrated service when they upgrade to DAT-MAIL version 20.18.05.18 or newer. Users simply have to create a login account for TDM via the <https://wb.truckdirectmail.com> URL to be able to access various functions provided on the TDM v2 web site. [Instructions for creating a TDM account](#) are provided in this Guide.

INTRODUCTION

TDM is a service for NDC and SCF drop shipping provided by Direct Logistics, Inc. that is now available to Window Book's Clients through their DAT-MAIL software (i.e. the Transportation View). DAT-MAIL users can now simply use the TDM-related buttons found in DAT-MAIL to leverage NDC/SCF drop-shipping for faster in-home dates and maximum postage savings for their mailings. Getting and managing quotes originates right from within DAT-MAIL along with a seamless transition to the TDM website for turning

Before You Begin

quotes it jobs/shipments, tracking those shipments 24/7, and performing a multitude of other tasks to make your NDC and SCF drop shipping easy and cost effective.

At this time (June of 2018), these NDC and SCF drop shipping services are available at the entry point level. These same capabilities will be expanded in a later release of DAT-MAIL (Fall of 2018) to be performed at the pallet-level.

REQUIREMENTS

The requirements for using the functions documented in this Guide are:

- DAT-MAIL version 20.18.06.16 or newer;
- The use of the following Window Book/TDM-related URL ONLY: <https://wb.truckdirectmail.com>;
- The TDM v2.0 web site was designed for, and works optimally with the following resources¹:
 - ~ Computer type: Desktop / Laptop / Surface® (not mobile devices);
 - ~ Operating System: Windows® (Win 8 or later);
 - ~ Internet Browser: Google® Chrome®;
 - ~ Apple® Computers: Mac® users should be able to access the TDM v2.0 site using the Google Chrome browse on desktop/laptop running a currently supported release of the Apple OS. The native Safari® browser is generally compatible with TDM v2.0, but not fully supported; therefore, not recommended; and
 - ~ Mobile Devices: The TDM v2.0 web site is not available on mobile phones. However, the site will generally work on a tablet or Surface, provided the device has a sufficiently large screen size/resolution and supports the Google Chrome browser.



Although Direct Logistics states in their documentation that an operating system of Win 8 or higher is a requirement for TDM v2, they have found that users running Windows 7 with the latest release of Chrome is a stable environment for the TDM v2 web site.

- [A Window Book/TDM-registered account](#); and



Clients with existing Truck Direct Mail accounts should use their existing accounts when logging into the [wb.truckdirectmail](https://wb.truckdirectmail.com) URL from DAT-MAIL. A secondary Window Book/TDM account should not be created/used.

- Mail.dat® files that contain pallets with NDC and/or SCF entry points. All entry points must have pallets.



Make sure to [whitelist the e-mail addresses both Window Book and Direct Logistics](#) uses to insure the necessary e-mail communication between DAT-MAIL, TDM and the Client can occur.

¹ Direct Logistics, *TDMv2-Troubleshooting-Guide-051618.pdf*. Accessed June 20, 2018.
<https://wb.truckdirectmail.com/#/resources>.

COMPONENT DESCRIPTION & USE

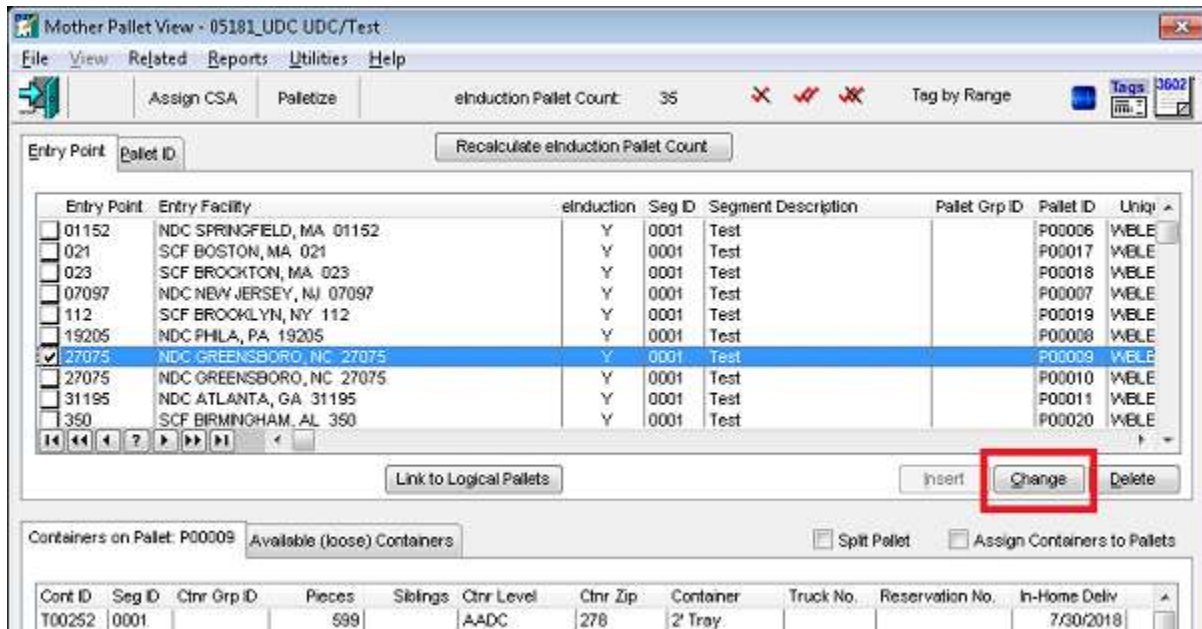
TDM quotes can be requested for pallets from a single Mail.dat file by entry point, or for pallets of “pooled” Mail.dat files by entry point. These two quote request types are created in different ways and from within different locations in DAT-MAIL.

Both quote types can be requested for all pallets by entry point or specific pallets associated with an entry point can be flagged for quoting/shipping using a mail date specified by the user. Mail dates must be entered or specified in the Mail.dat file before requesting quotes via TDM. Instructions for entering mail dates are provided below.

ENTERING MAIL DATES

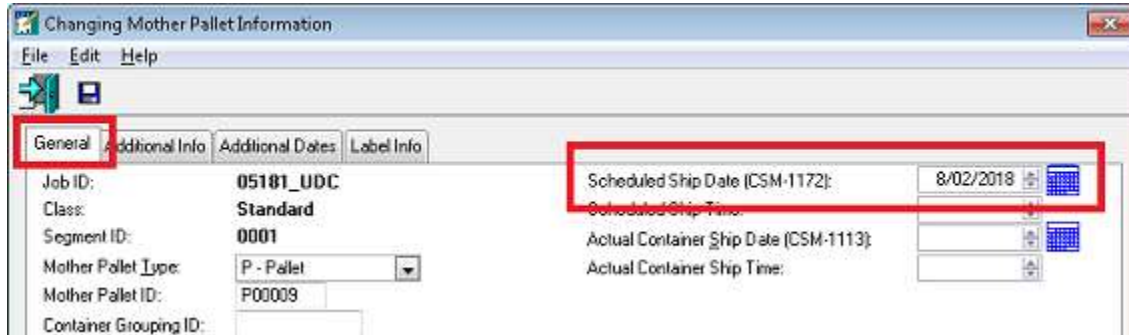
Using a mail date to identify specific pallets for quoting/shipping is easily accomplished; however, the mail date has to be included in the Mail.dat file before requesting a quote via TDM. Mail dates are entered by the user in DAT-MAIL’s *Mother Pallet View*.

Simply open a Mail.dat file. In the Advanced Navigator, click the **Palletize** button. The *Mother Pallet View* screen will display. Select the entry point to enter a mail date for and click the **Change** button (or double click on the entry point’s line item in the list).



Component Description & Use

The *Changing Mother Pallet Information* screen will display. In the 'General' tab, enter the desired mail date in the 'Scheduled Ship Date' field. Click the **OK** button when finished.



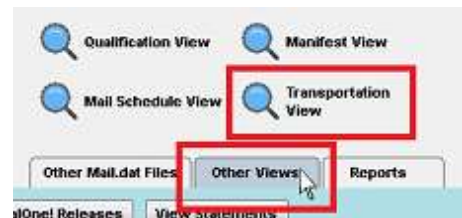
Repeat the process for other instances of the same entry point, entering the desired mail date for each.

QUOTES FOR A SINGLE FILE

The TDM functions involved with creating and managing a quote(s) for a single Mail.dat file are accessible from DAT-MAIL's *Transportation View*.

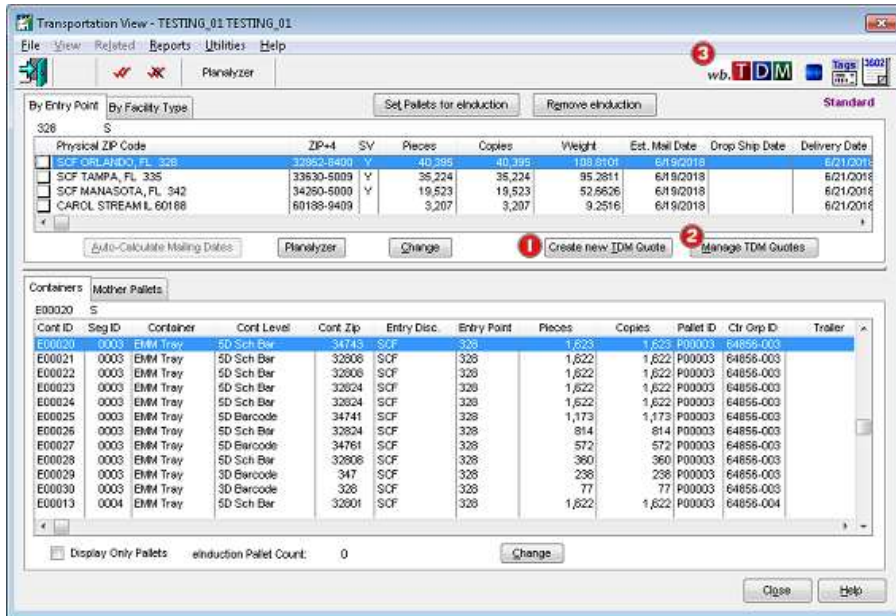
There are two ways users can access this view, both of which are performed from the Advanced Navigator, which displays when a job or Mail.dat is selected from DAT-MAIL's Jobs list.

- In the Advanced Navigator, hover over the 'Other Views' tab located near the bottom of the screen and click the 'View Destinations' option. The *Transportation View* screen will display for the selected job/Mail.dat;
- In the Advanced Navigator, select the 'View' menu located at the top of the screen and then select 'Transportation View'. The *Transportation View* screen will display for the selected job/Mail.dat.



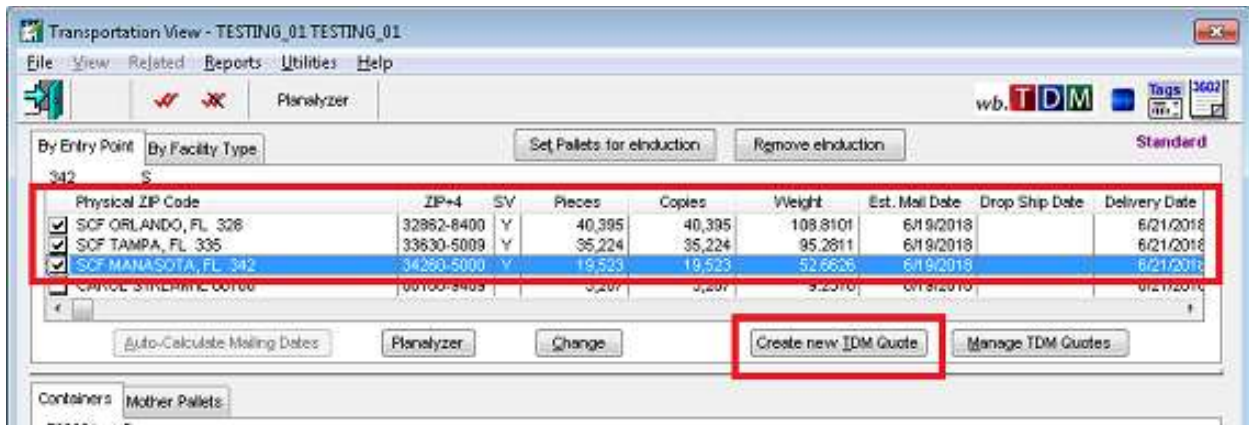
For information on quotes involving multiple Mail.dat files, refer to [TDM POOLED QUOTES](#).

There are three TDM-related buttons in DAT-MAIL's *Transportation View* screen: the **Create new TDM Quote** button **1**; the **Manage TDM Quotes** button **2**; and the button that launches the TDM web site **3**.



Create Quote From A Single File

To get a TDM quote, select the appropriate entry point(s) in the selected file, and click the **Create new TDM Quote** button.

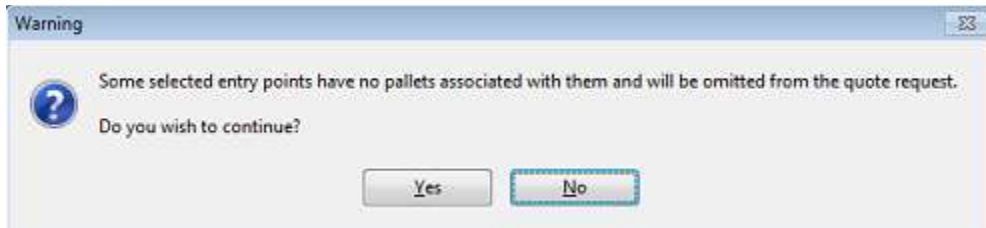


Component Description & Use

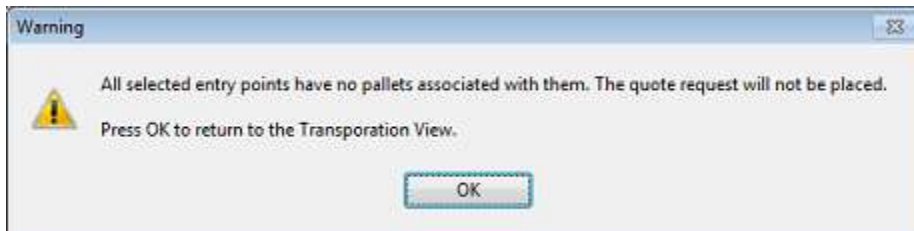
A *TDM Quote Disclaimer* dialog will display. If the user does not wish to have this dialog display again, enable (check) the 'Do not display again' option. Click the **Yes** button to continue (clicking the **No** button will abort the quote request process).



i *If multiple entry points are selected and one or some of the entry points do not contain pallets, a Warning dialog will display. Click the YES button to continue (clicking the NO button will abort the quote request process).*

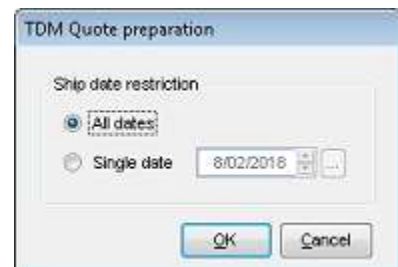


i *If no pallets exist in any of the entry point or points selected, a different Warning dialog will display. Click the OK button to be returned to the Transportation View.*

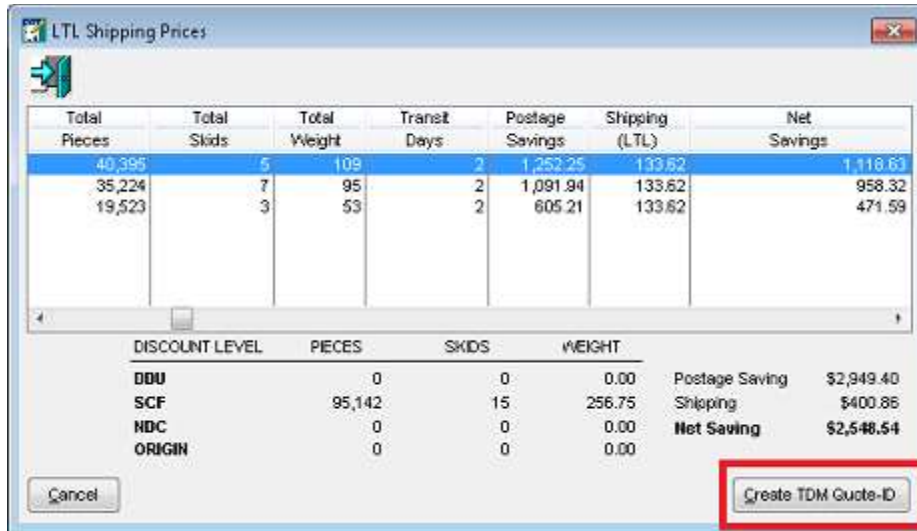


A *TDM Quote preparation* screen will display. This screen allows the user to include all pallets associated with the selected entry point(s) or only those pallets for the selected entry point(s) based on a previously entered mail date (refer to [ENTERING MAIL DATES](#) for more information).

If all pallets associated with the selected entry point(s) should be included in the quote, select the 'All dates' option. To include only those pallets associated with a specific mail date, select the 'Single date' option and specify the appropriate mail date. Click the **OK** button when finished to request the quote.



When the quote is returned, an *LTL Shipping Prices* screen will display. The entry point(s) selected on the *Transportation View* screen will be listed, along with the Total Pieces, Total Skids, Total Weight (rounded up or down to a whole number), Transit Days, Postage Savings, the Shipping (LTL) cost, and the Net Savings, for each. In addition, the sum total of the of the Pieces, Skids, Weight, Postage Savings, Shipping Charges, Net Savings for the selected entry point(s) are displayed on the bottom of the screen.



i *Quotes will be provided for pallets only. Loose trays or sacks will not be included in a quote.*

To save the quote for future reference/use, a TDM Quote ID must be assigned to it. To create/assign a TDM quote ID for the displayed quote, click the **Create TDM Quote-ID** button.

i *If users click the CANCEL button on the 'LTL Shipping Prices' screen without first obtaining a TDM Quote ID, the quote information will be lost. Obtaining a quote for the same file/point(s) at a later date may result in a change in the shipping charges and/or postage savings.*

A confirmation dialog will display, containing the TDM Quote ID (e.g. TDM Quote ID 124). Click the **OK** button to resolve the dialog.



At this point, users can either close the *LTL Shipping Prices* screen by clicking the **Exit** button, or launch/open the quote on the TDM web site by clicking the **Go to Quote** button.

Go To Quote

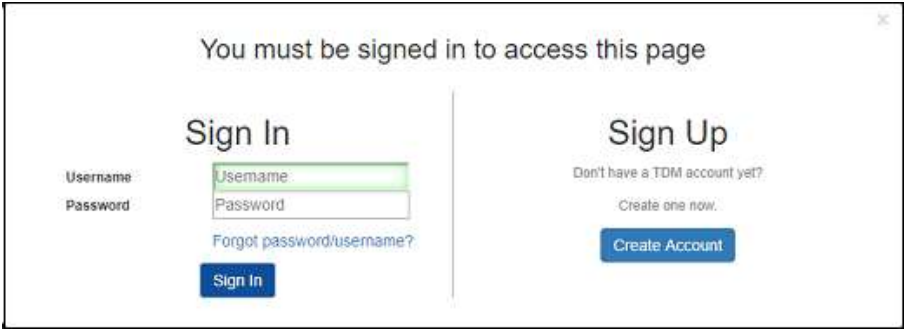
i *The instructions provided in this section of the Guide assume the user/Client already has an account registered with TDM. For instructions on how to register a Window Book/TDM account, refer to [How to Register An Account](#) in this Guide.*

Component Description & Use

! *Clients with existing Truck Direct Mail accounts should use their existing accounts when logging into the [wb.truckdirectmail](https://wb.truckdirectmail.com) URL from DAT-MAIL. A secondary Window Book/TDM account should not be created/used.*

When the **Go to Quote** button is clicked, a web browser will launch. If a user is not already logged into TDM, the TDM Sign-in page will display. Sign in by entering the appropriate/correct Username and Password, and click the **Sign In** button.

! *It is very important that DAT-MAIL users sign in using the Window Book/TDM URL (i.e. <https://wb.truckdirectmail.com>).*



When the sign in is completed successfully, a *MAIL.DAT/PRE-QUOTE* page will display while the pre-quote is being processed.



i *The *MAIL.DAT/PRE-QUOTE* page will automatically display when the **GO TO QUOTE** button is clicked if the user is already signed in to TDM.*

When the processing completes, the first in a series of *MAIL.DAT/PRE-QUOTE* screens specific to the selected pre-quote will display. The details on these screens are populated either from the Mail.dat file the quote was generated from or the default settings entered in the Client's TDM account profile. Many of the fields can be edited by the user before the quote is turned into an actual shipment. Users will be required to confirm and/or edit the details on each screen before continuing.

MAIL.DAT / PRE-QUOTE – SUCCESS!

The first screen to display is the *Success!* screen. Enter a Job Name (if not already populated) and PO Number for the job. Confirm the remainder of the information shown is correct. Also, confirm/change the Mail Type and enter the correct Piece Weight, and then confirm (check) that the piece weight entered/shown is correct. When finished, click the **Looks Good, Let's Go!** button to continue.



The LOOKS GOOD, LET'S GO button will not be enabled until the Piece Weight is confirmed to be correct.



If the CANCEL UPLOAD button is clicked, no indication is provided on the screen that the cancellation is occurring (June 2018). Users will; however, be re-directed to the TDM home page when the cancellation is complete.

MAIL.DAT / PRE-QUOTE

Pre-Quote ID L1-53

Success!

We've loaded the following information from your selection above. If there are problems with the data, check the file in your mail.dat software. Bear in mind, you will be provided the opportunity to view/edit the details of this job on the following screens.

Job Name

PO Number

Description

Mail Type NDC Mail Pieces 0

NDC Entries 0 SCF Mail Pieces 95,142

SCF Entries 3 Non-Dest Mail 0

Pallets can be double-stacked? no Total Mail 95,142

Piece Weight (oz) (= 0.00625 lb)

I confirm this is the correct pieceweight (required)

The MAIL.DAT/PRE-QUOTE – Pickup Details screen will display.

MAIL.DAT / PRE-QUOTE – PICKUP DETAILS

In the *Pickup Details* screen, confirm the correct Origin Facility is selected. TDM will default to the origin default facility specified in the Client's TDM account profile. Use the drop down to select a different facility. If the desired origin facility is not listed, it will need to be added to the Client's TDM account profile.

Component Description & Use

The options available/set for 'Vehicle Access' are determined by what is entered for the origin facility in the Client's TDM account profile. If this needs to be modified, the details for the origin facility must be edited in the account profile.

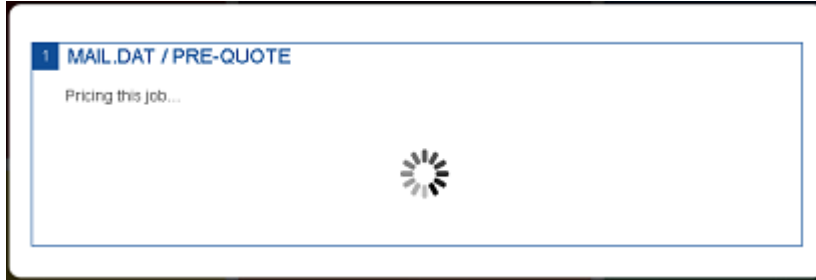
The screenshot shows a web form titled "MAIL.DAT / PRE-QUOTE". It contains several sections: "Job Name" (Testing_01), "PO Number" (Quote #L1-53), "Pickup Details" (Origin Facility: Window Book, Inc. (default) (O); Operating Hours: 12:00:00 PM To 02:00:00 PM; Liftgate Required: no; Vehicle Access: Tractor Trailer Box Van), and "Delivery Planning" (Settings are pre-loaded but can be changed specifically for this job; Delivery Plan: All shipments pickup on the same day; Pickup Date: 06/25/2018). At the bottom right, there are two buttons: "Go Back" and "All Done, Let's Price It!".

The option for the 'Delivery Planning' is determined by what is specified in the Client's TDM account profile. The option can be changed; however, by clicking the drop down and selecting an option from the list. For more information about the different options, refer to [Delivery Plan Options](#) in this Guide.

This is a close-up of the "Delivery Planning" section of the form. The "Delivery Plan" dropdown menu is open, showing several options: "All shipments pickup on the same day" (highlighted in blue), "-- Select --", "Stage shipments for NDC / SCF arrival targets", "Stage shipments for in-home date range*", "Use the ship dates specified in the prequote", and "We will deliver all mail to the local carrier terminal". A red box highlights the dropdown arrow on the "All shipments pickup on the same day" option. The "Pickup Date" field is visible below the dropdown. A "Let's Price It!" button is partially visible on the right.

Depending on what option is selected, additional date fields may display that will require input. When finished, click the **Looks Good, Let's Price It!** button to price the job for the selected pre-quote.

A processing screen will display while the job is being priced.



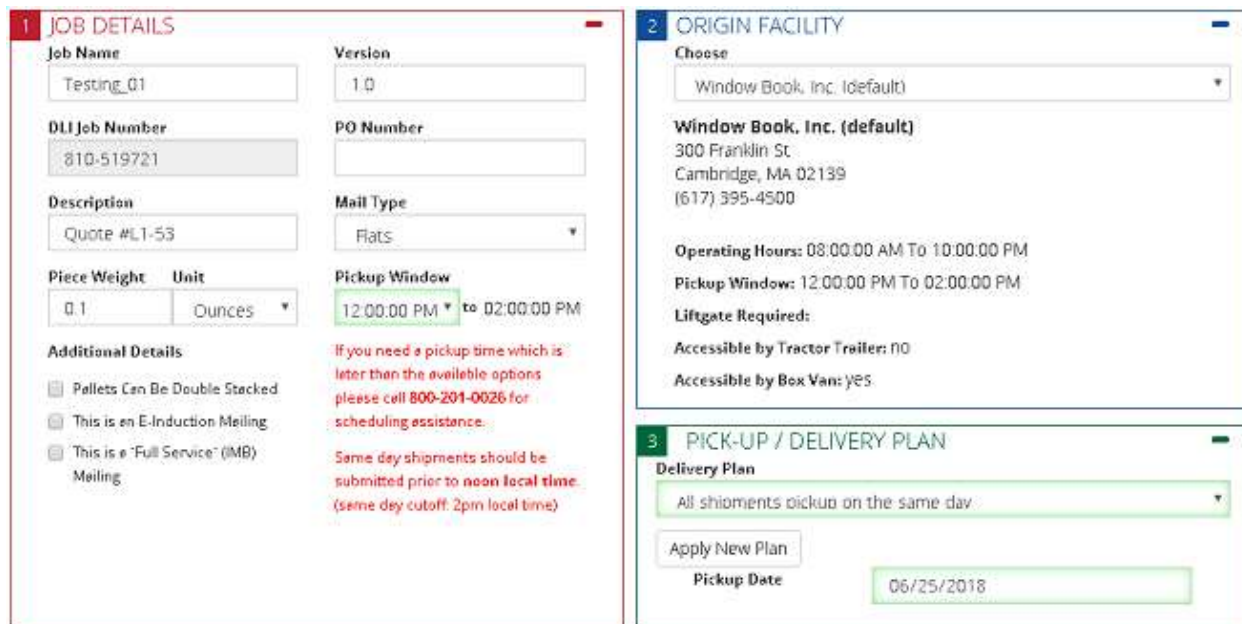
When pricing is completed, an *Edit Existing Job* page will display.

EDIT EXISTING JOB

The *Edit Existing Job* screen is numerically divided into six sections:

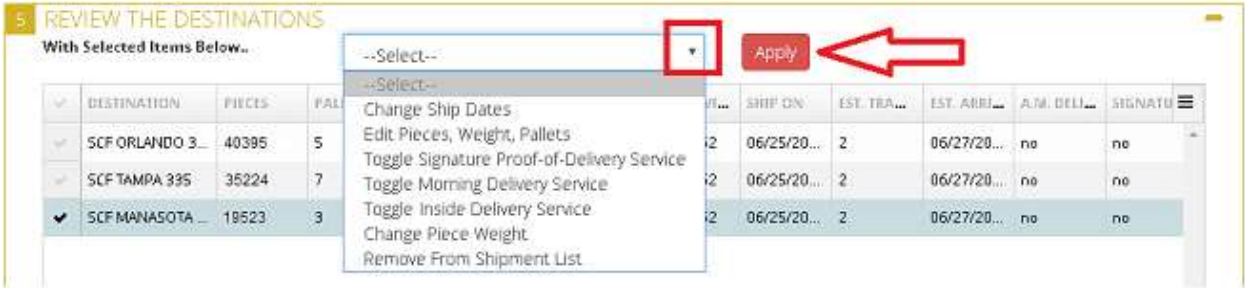
- 1 JOB DETAILS;
- 2 ORIGIN FACILITY;
- 3 PICK-UP / DELIVERY PLAN;
- 4 ENTER THE DESTINATION POINTS;
- 5 REVIEW THE DESTINATIONS; and
- 6 CONFIRM THE JOB FOR SHIPMENT.

The details specified in the previous screens as they relate to the Job Details, Origin Facility, and the Pick-up / Delivery Plan are provided in sections 1, 2, and 3. With the exception of the 'DLI Job Number', the fields in these sections can still be edited at this time.

A screenshot of the "EDIT EXISTING JOB" screen, divided into three sections. Section 1, "JOB DETAILS", contains fields for Job Name (Testing_01), Version (1.0), DLI Job Number (810-519721), PO Number, Description (Quote #L1-53), Mail Type (Flats), Piece Weight (0.1), Unit (Ounces), and Pickup Window (12:00:00 PM to 02:00:00 PM). It also includes "Additional Details" with checkboxes for "Pallets Can Be Double Stacked", "This is an E-Induction Mailing", and "This is a 'Full Service' (IMB) Mailing". Red text provides instructions: "If you need a pickup time which is later than the available options please call 800-201-0026 for scheduling assistance." and "Some day shipments should be submitted prior to noon local time. (same day cutoff: 2pm local time)". Section 2, "ORIGIN FACILITY", shows a dropdown menu for "Choose" (Window Book, Inc. (default)), address (300 Franklin St, Cambridge, MA 02139, (617) 395-4500), Operating Hours (08:00:00 AM To 10:00:00 PM), Pickup Window (12:00:00 PM To 02:00:00 PM), Liftgate Required, Accessible by Tractor Trailer (NO), and Accessible by Box Van (YES). Section 3, "PICK-UP / DELIVERY PLAN", shows a dropdown menu for "Delivery Plan" (All shipments pickup on the same day), an "Apply New Plan" button, and a "Pickup Date" field (06/25/2018).

Component Description & Use

The destination points or drops are listed in section 5. Users can edit specific details about any or all of the points or remove a point(s) from the shipment list. Single-click on a point's line item to select/highlight it and select on an option from the list using the drop down provided.



If changes are made, make sure to click the **Apply** button. To de-select a point, click anywhere on the selected point's line item.

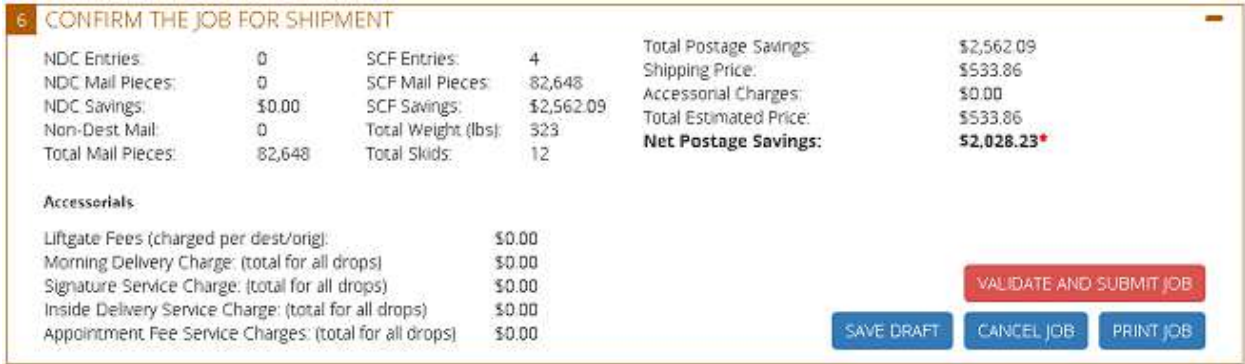
If a user wishes to add a destination point, they can do so in section 4 by satisfying the required fields, checking the "I confirm this is the correct piece weight" confirmation, and clicking the **ADD DROP** button.



The screen up will update, the newly entered destination point or drop will display in the Destination List (i.e. section 5), and a confirmation message will display.



Section 6 displays the details of the job as far as number and type of entry points, total mail pieces, weight, skids, entry type savings, postage savings, shipping price, any accessorial charges, and the total estimated price along with the net postage savings.



At this point, the user has four options:

1. The job can be saved, but not submitted by clicking the **SAFE DRAFT** button, at which point the user is redirected to the TDM home screen;
2. The job can be canceled (not deleted), by clicking the **CANCEL JOB** button, at which point the user is redirected to the TDM home screen;
3. The job can be printed, by clicking the **PRINT JOB** button. A Job Summary document will display in the browser that can sent to a printer; or

Job Summary DL#: 810-519721

				ESTIMATED VALUES				ACTUALS / FINALS						
ID	DESTINATION FACILITY	SHIP DATE	TRANS DATE	MAIL PIECES	SAVES	WEIGHT (LBS)	POSTAGE (\$)	SHIP PRICE	SAVINGS	SAVES	WEIGHT (LBS)	POSTAGE (\$)	SHIP PRICE	SAVINGS
548904	(R) SCF ORLANDO 308	09/25/18	2	40,399	5	108	\$1,252.25	\$133.62	\$1,118.63	0	0	\$1,252.25	\$0.00	\$1,252.25
548905	(R) SCF TAMPA 305	09/25/18	2	19,523	3	52	\$605.21	\$133.62	\$471.21	0	0	\$605.21	\$0.00	\$605.21
548906	(R) SCF MANASSA 342	09/25/18	2	19,523	3	52	\$605.21	\$133.62	\$471.58	0	0	\$605.21	\$0.00	\$605.21
548936	(R) SCF JACKSONVILLE 320	09/25/18	2	3,207	1	111	\$89.42	\$133.62	(\$34.20)	0	0	\$89.42	\$0.00	\$89.42

ESTIMATE SUMMARY						ACTUALS SUMMARY					
MAIL PIECES	SAVES	WEIGHT (LBS)	POSTAGE (\$)	SHIP PRICE	SAVINGS	SAVES	WEIGHT (LBS)	POSTAGE (\$)	SHIP PRICE	SAVINGS	
MDQASFP	0	0	0	\$0.00	\$0.00	0	0	\$0.00	\$0.00	\$0.00	
SCP	82,648	12	\$2,582.09	\$933.86	\$2,028.23	0	0	\$2,582.09	\$0.00	\$2,582.09	
NON-OCSF	0	0	\$0.00	\$0.00	\$0.00	0	0	\$0.00	\$0.00	\$0.00	
TOTAL	82,648	12	\$2,582.09	\$933.86	\$2,028.23	0	0	\$2,582.09	\$0.00	\$2,582.09	

ESTIMATED SHIPPING PRICE: \$933.86 FINAL SHIPPING PRICE: \$0.00

TERMS: NET 30 PAYMENT TO: DIRECT LOGISTICS, INC 4208 SPRINGWOOD DRIVE, SUITE 250 IRVING, TEXAS 75014 *PAY THIS AMOUNT*

Shipping prices disclosed in the Actuals / Finals section of this statement represent confirmed weights and carrier charges for each shipment, and may vary from the estimated values which are based solely upon the USPS® as entered. On rare occasions, shipment savings or discounts may be required to complete a shipment, and will be reflected on an amended invoice. Due to unique USPS rate code assignments, the postage discounts shown may not reflect the actual postage charged for this job. The USPS® destination is published weekly by TDM and the carrier's destination history database for mail pieces under 35 ounces, rate information is not available. The postage savings indicated in your carrier's published on-line software to determine your net savings for NDC / SCF destination entry shipping. The actual mail included in this report is an estimate. Not service guarantee, and 00-00 include weekends, holidays, or other service anomalies. Once mail is accepted at an NDC / SCF facility, in-home delivery or carrier's class that is entry subject to USPS service standards.

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4. The user can submit the job for shipment by clicking the **VALIDATE AND SUBMIT JOB** button. TDM runs a quick validation to confirm that there are no problems with the job setup.

Component Description & Use

TDM will also notify the user if there are any issues with this that could affect the shipment, such as the re-direction to different facilities, at which point the user can cancel the shipment or click the Accept button and continue with the shipment.



When the validation completes successfully, a confirmation will display.



Click the **Cancel** button to cancel the shipment request or click the **SHIP IT** button to schedule the shipment.

TDM requires the user to agree to the Terms & Conditions before the shipment can be scheduled. To agree, click the **Agree** button.



 **The Terms & Conditions must be agreed to on a job-by-job basis.**

The screen will update, and the final Job Summary page will display. The job has been scheduled for shipment!

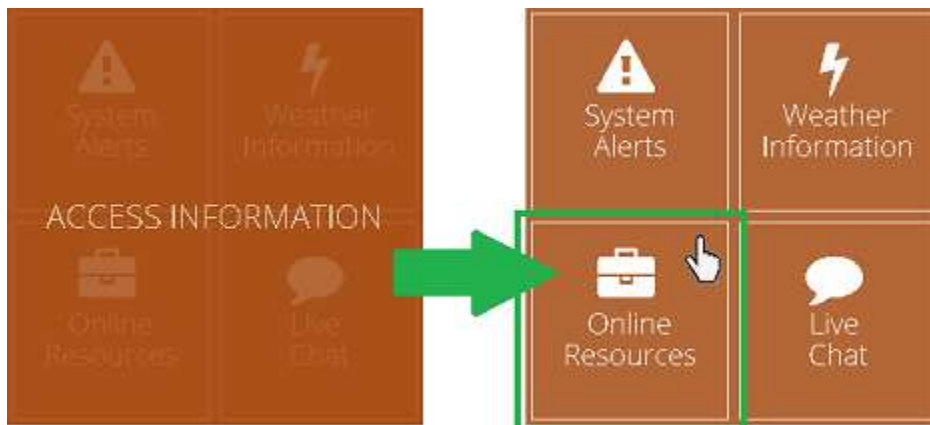
Thanks for Shipping with TruckDirectMail.com

HERE'S YOUR JOB SUMMARY

Job Name:	Testing_01	Origin Name:	Window Book, Inc. (default)	TDM Job Number 810-519721
Job Number:	810-519721	Address:	300 Franklin St. Cambridge, MA 02139	
Description:	Quote #L1-53	Left-Gate Req'd:	no	Estimated Price \$533.86
Version:	1.0	Delivery Plan:		
P.O. Number:		First Pickup Date:	Jun 25, 2018	Invoice Status:
Mail Type:	Flets	Last Pickup Date:	Jun 25, 2018	
Pieceweight:	0.1	Pickup Today:	no	
Pallets Stackable:	no	Pickup Window:	02:00:00 to 14:00:00	
E-Induction:	no	First Arrival Date:	Jun 27, 2018	
Full Service (IMB):	no	Last Arrival Date:	Jun 27, 2018	
Submitted On:				

DESTINATION	PIECES	PALLETS	WEIGHT (LB)	POSTAGE SAVINGS	SHIPPING PRICE	NETSAVINGS	SHIP ON
SCF JACKSONVILLE	3207	1	111	\$99.42	\$133.62	-\$34.20	06/25/18
SCF ORLANDO 328	40395	5	108	\$1,252.25	\$133.62	\$1,118.63	06/25/18
SCF MANASOTA 342	19523	3	52	\$605.21	\$133.62	\$471.59	06/25/18
SCF TAMPA 335	19523	3	52	\$605.21	\$133.00	\$472.21	06/25/18

i To learn more about the services and functionality TDM offers, including information on bills of lading and other shipping-related documentation, refer to the "Online Resources" option found under 'Access Information' on TDM's website (<https://wb.truckdirectmail.com/#/resources>). Login is required.



For information on managing a Client's job history in TDM, refer to [Manage Jobs In TDM](#) in this Guide.

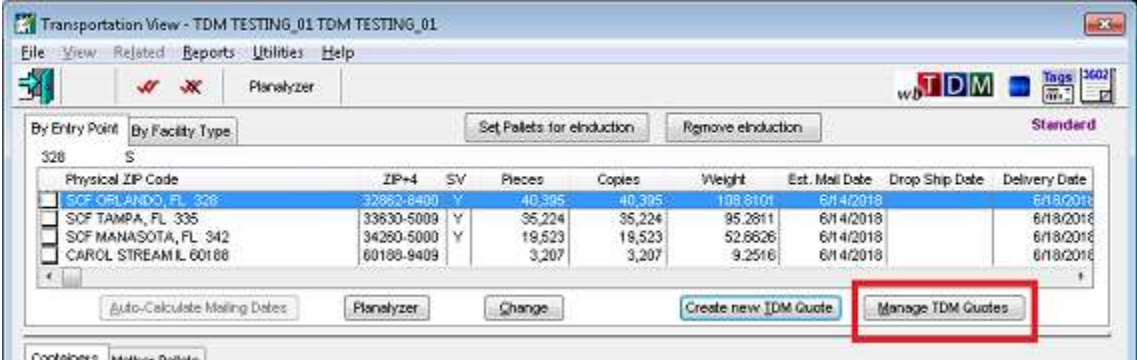
Component Description & Use

Manage TDM Quotes

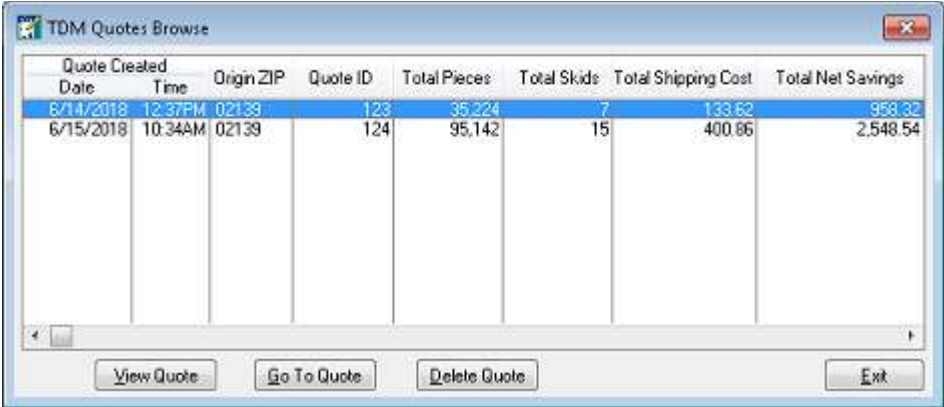
Once quotes for a single file are turned into jobs on TDM, the jobs (or saved drafts of jobs) are managed through TDM (refer to [Manage Jobs In TDM](#) for more information). Quotes; however, are managed in DAT-MAIL.

i Pricing is generated dynamically when using TDM. Therefore, It should be noted that, although unlikely, it is possible that quoted shipping prices may change.

To manage existing TDM quotes for a selected file, click the **Manage TDM Quotes** button.

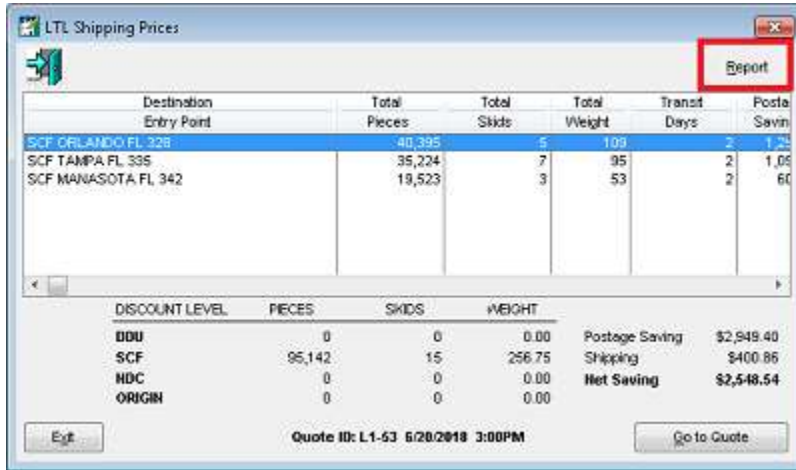


The *TDM Quotes Browse* screen will display. The TDM quote(s) created for the selected job will display, including the Date/Time the Quote was Created; associated Origin ZIP; the Quote ID; the Total Pieces included in the quote; Total Skids included in the quote; the Total Shipping Cost; and the Total Net Savings.



To view the details of an individual quote, select (highlight) the quote on the screen and click the **View Quote** button.

The LTL Shipping Prices screen will display with the selected quote's information.



A paper copy of the quote's details, including the Mail.dat file that it pertains to can be viewed/printed by clicking the **Report** button in the top right corner of the screen.

Run: 6/20/18 2:01PM Page: 1

TDM Quote Report

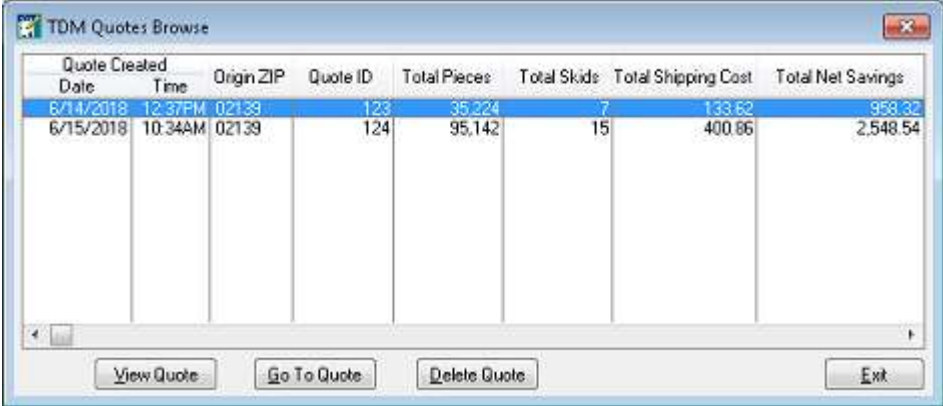
ORIGIN ZIP: 02139
 Job: 00164856
 TESTING_01
 TESTING_01
 Quote ID: L1-53

Destination Entry Point	Total Pieces	Total Skids	Total Weight	Transit Days	Postage Saving	Shipping (LTL)	Savings Net
SCF ORLANDO FL 328	40,395	5	109.81	2	1,252.25	133.62	1,118.63
SCF TAMPA FL 335	35,224	7	95.28	2	1,081.94	133.62	958.32
SCF MANASOTA FL 342	19,523	3	52.66	2	605.21	133.62	471.59

Grand Totals:

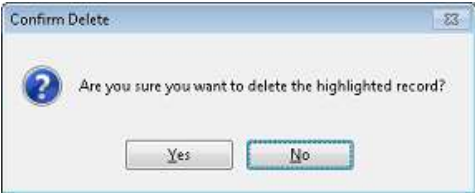
DISCOUNT LEVEL	PIECES	SKIDS	WEIGHT		
DDU	0	0	0.00	Postage Saving	\$2,949.40
SCF	95,142	15	256.75	Shipping	\$400.86
NDC	0	0	0.00	Net Saving	\$2,548.54
ORIGIN	0	0	0.00		

Component Description & Use



To launch/open the quote on the TDM web site, click the **Go To Quote** button (refer to [Go To Quote](#) above for more information).

Quotes can be deleted one at a time by selecting/highlighting a quote and clicking the **Delete Quote** button. A *Confirm Delete* dialog will display.



Click the **Yes** button to delete the quote or the **No** button to stop the delete process. Both options will resolve the dialog, returning to the *TDM Quotes Browse* screen.

i *Deleting TDM quotes within DAT-MAIL does not delete them from the TDM web site. DAT-MAIL-originated TDM pre-quotes are held/accessible from within TDM for up to 60 days.*

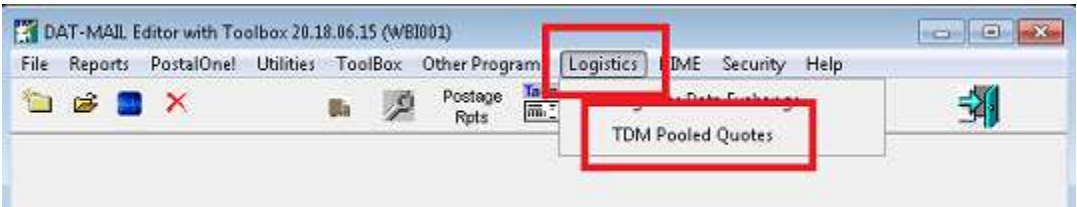
Click the **Exit** button to close the *TDM Quotes Browse* screen.

TDM POOLED QUOTES

“TDM Pooled Quotes” is a feature intended to help Clients that have multiple Mail.dat files representing versions of the same job, create consolidated quotes that include mail from multiple versions. It could also be used to pool different jobs that have the same mail class and processing category.

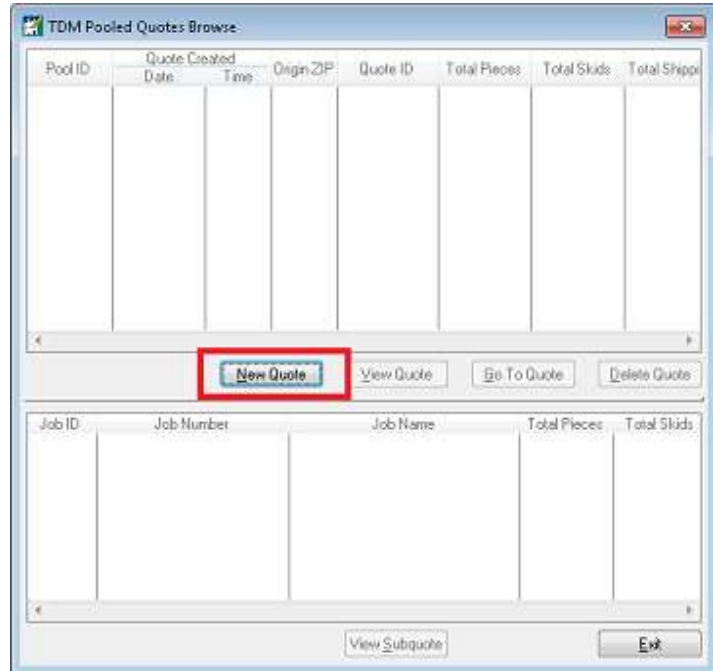
Create A TDM Pooled Quote

The ‘TDM Pooled Quote’ feature is accessible via the ‘Logistics’ menu in DAT-MAIL’s main screen.



When the 'TDM Pooled Quotes' menu option is selected, the *TDM Pooled Quotes Browse* displays. Existing pooled quotes will be displayed in this screen (in the screen image right, no pooled quotes exist).

To create a TDM Pooled Quote, click the **New Quote** button.



A *TDM Quote Disclaimer* dialog will display. If the user does not wish to have this dialog display again, enable (check) the 'Do not display again' option. Click the **Yes** button to continue (clicking the **No** button will abort the quote request process).



The *Select Mail.dat Files to TDM Pooled Quotes creation* screen will display. All available Mail.dat files will be listed. To help prevent accidentally selecting Mail.dat files that cannot be pooled together, users can do one of two things: 1) Use the 'Tag files by mailing date' function (assuming all files have the 'First Mail Date' field populated) ; or 2) Create or select a filter that stipulates the mail class and processing category of Mail.dat files.

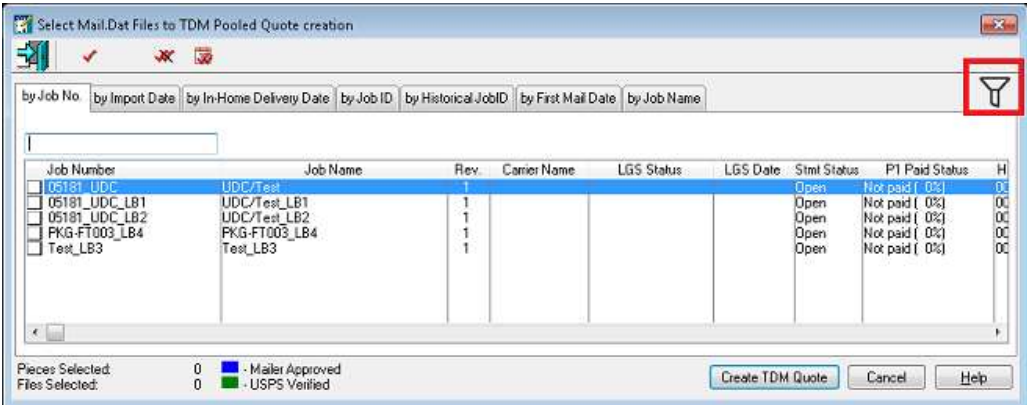
The 'Tag files by mailing date' function simply tags (checks) the files that meet the criteria specified in the *Tag by First Mailing Date* screen. It does not filter jobs from the list, but tags them for selection. If a job does not meet the criteria, it does not get tagged (checked).



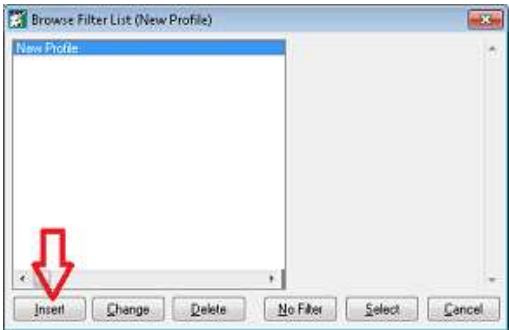
Component Description & Use

Using the filter option removes jobs from the list that don't meet the filter's criteria. Only jobs that do meet the criteria display in the list and then users can tag (check) which of those jobs they wish to include in the pool. Window Book recommends creating a filter for "Standard Mail Letters". Click the filter icon to create/set the filter.

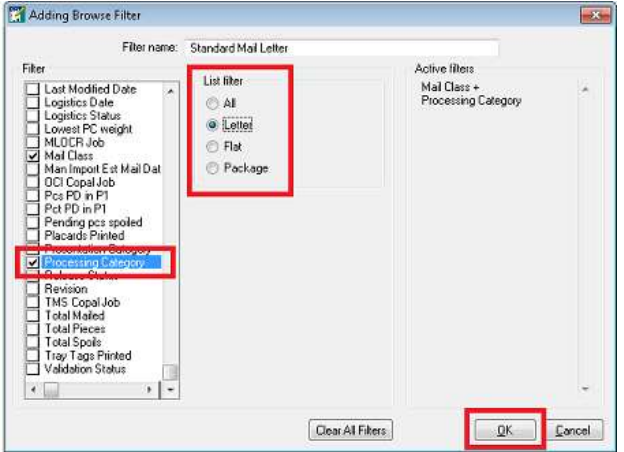
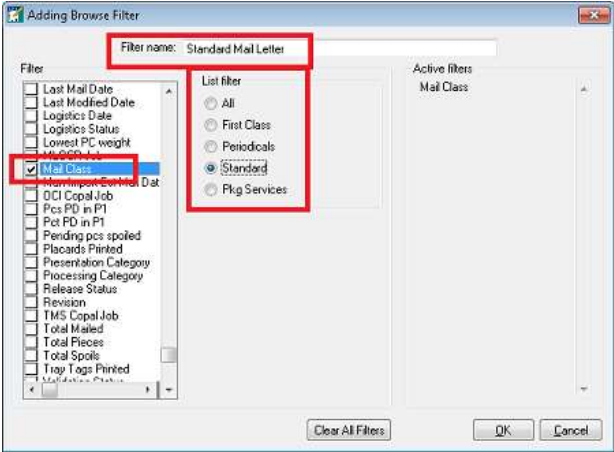
  Denotes no filter has been applied.  Denotes a filter has already been applied.



The *Browse Filter List* screen will display. If previously created filters exist, they will display in the list. Click the **Insert** button to create the "Standard Mail Letters" filter mentioned above.



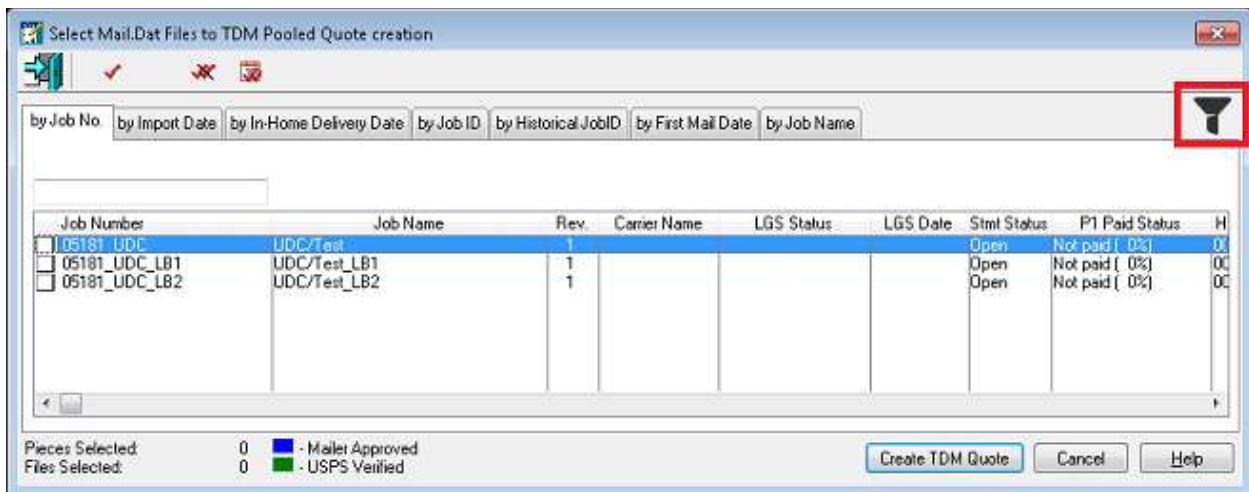
The *Adding Browse Filter* screen will display. Enter a filter name, i.e. "Standard Mail Letter". Scroll down the filter list and select 'Mail Class', then select "Standard" from the options on the right. Next, locate and select 'Processing Category' in the filter list and then "Letter" from the options on the right. Click the **OK** button when finished.



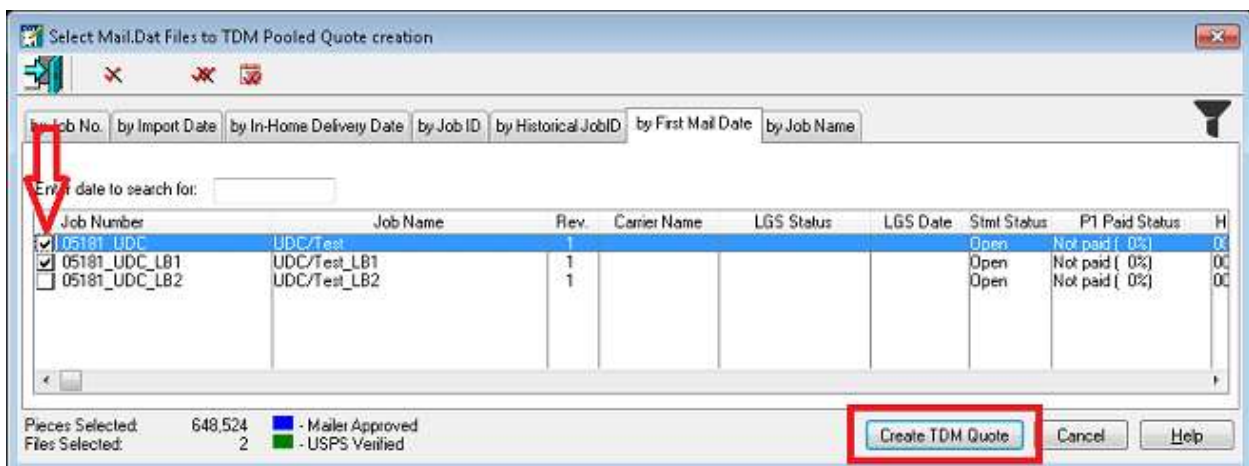
The Browse Filter List screen will display and the newly created filter (i.e. “Standard Mail Letter”) will display in the list. With the new filter highlighted/selected, click the **Select** button.



The *Select Mail.dat Files to TDM Pooled Quotes creation* screen will display with the filter “Standard Mail Letter” filter applied. Only those Mail.dat files that meet the criteria of the filter will display (compare the contents/results of the screen image below, with the same screen image shown in Step 3 above).

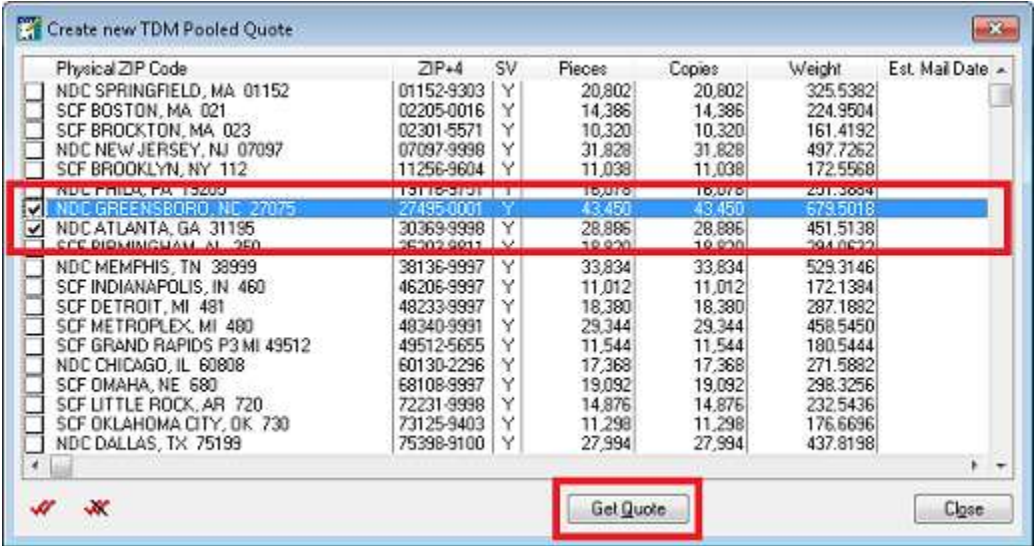


Select (check) the Mail.dat files that should be “pooled” together and click the **Create TDM Quote** button.



Component Description & Use

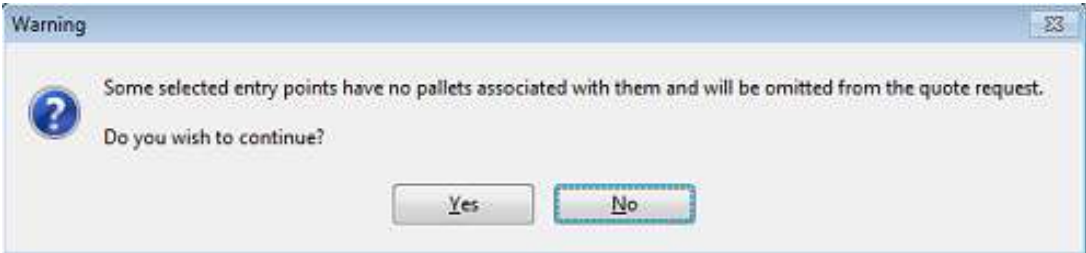
The *Create new TDM Pooled Quote* screen will display, listing all of the entry points contained in the pooled Mail.dat files. Select (check) the entry points to get quotes for and click the **Get Quote** button (you can select (check) all of the points listed by using the double check marks located in the bottom left corner of the screen)).



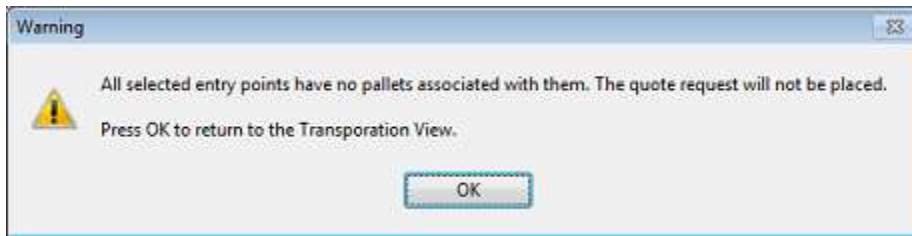
A *TDM Quote Disclaimer* dialog will display (if not previously ‘turned off’ when displayed earlier). If the user does not wish to have this dialog display again, enable (check) the ‘Do not display again’ option. Click the **Yes** button to continue (clicking the **No** button will abort the quote request process).



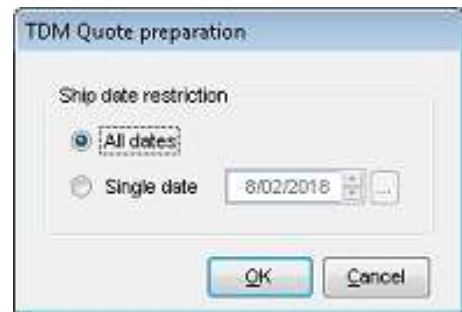
i *If multiple entry points are selected and one or some of the entry points do not contain pallets, a Warning dialog will display. Click the YES button to continue (clicking the NO button will abort the quote request process).*



i If no pallets exist in any of the entry point or points selected, a different Warning dialog will display. Click the OK button to be returned to the "Create new TDM Pooled Quote" screen.

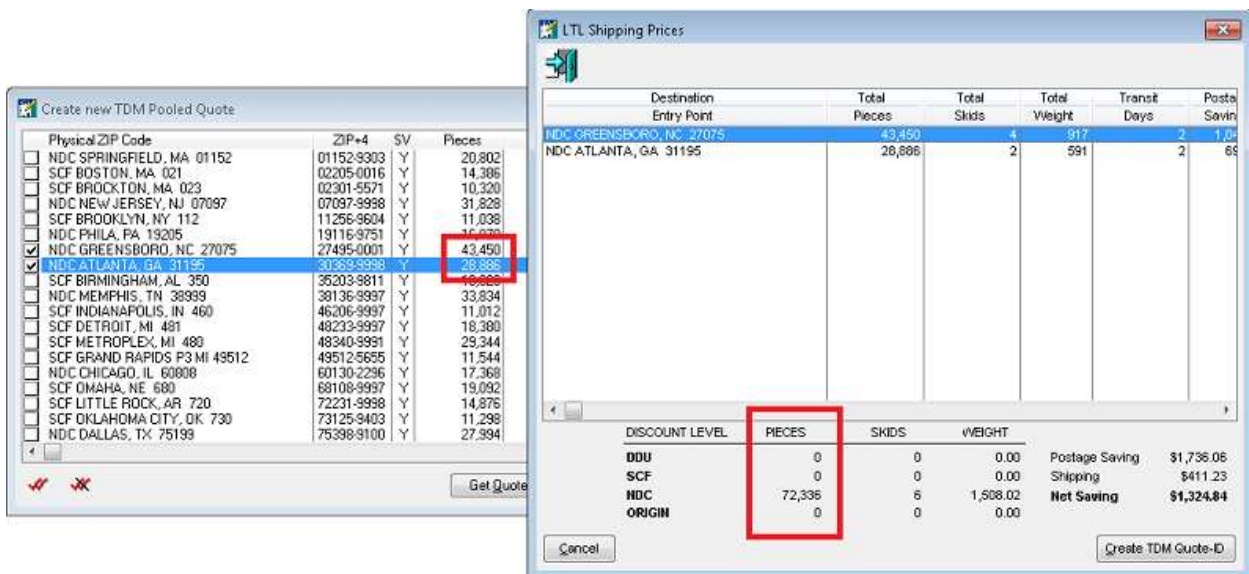


A TDM Quote preparation screen will display. This screen allows the user to include all pallets associated with the selected entry point(s) or only those pallets for the selected entry point(s) based on a previously entered mail date (refer to [ENTERING MAIL DATES](#) for more information).



If all pallets associated with the selected entry point(s) should be included in the quote, select the 'All dates' option. To include only those pallets associated with a specific mail date, select the 'Single date' option and specify the appropriate mail date. Click the **OK** button when finished to request the quote.

The LTL Shipping Prices screen will display with the returned quote information. The selected entry points will be listed, along with the Total Pieces, Total Skids, Total Weight (rounded up or down to a whole number), Transit Days, Postage Savings, the Shipping (LTL) cost, and the Net Savings, for each. In addition, the sum total of the of the Pieces, Skids, Weight, Postage Savings, Shipping Charges, Net Savings for the selected entry point(s) are displayed on the bottom of the screen.



i Quotes will be provided for pallets only. Loose trays or sacks will not be included in a quote.

Component Description & Use

To save the quote for future reference/use, a TDM Quote ID must be assigned to it. To create/assign a TDM quote ID for the displayed quote, click the **Create TDM Quote-ID** button (see screen image above).

i *If users click the CANCEL button on the 'LTL Shipping Prices' screen without first obtaining a TDM Quote ID, the quote information will be lost. Obtaining a quote for the same file(s)/point(s) at a later date may result in a change in the shipping charges and/or postage savings.*

A confirmation dialog will display, containing the TDM Quote ID (e.g. TDM Quote ID L1-150). Click the **OK** button to resolve the dialog.



The Quote ID will display at the bottom of the *LTL Shipping Prices* screen. Users have the option to print the total freight details of the quote or the freight details by job by clicking the Report button located in the top right corner of the screen.



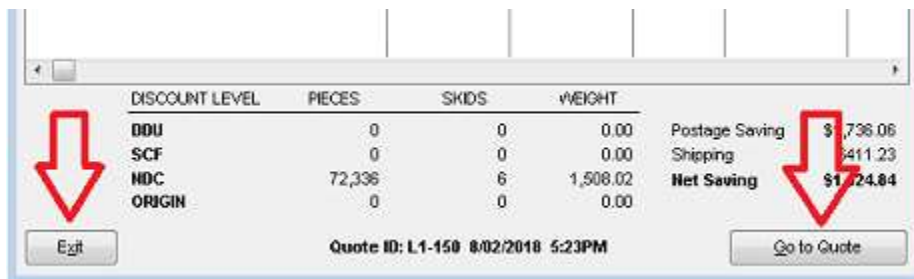
Example: Total Freight Only Report (i.e. TDM Pooled Quote Report Totals)

Run: 8/02/18 5:28PM		TDM Pooled Quote Report Totals							Page: 1
ORIGIN ZIP: 02139									
Pool ID: 1									
Quote ID: L1-150									
Destination Entry Point	Total Pieces	Total Skids	Total Weight	Transit Days	Postage Saving	Shipping (LTL)	Savings Net		
NDC GREENSBORO, NC 27075	43,450	4	917.30	2	1,042.80	214.86	827.94		
NDC ATLANTA, GA 31195	28,886	2	590.71	2	693.26	196.37	496.90		
Grand Totals:									
DISCOUNT LEVEL	PIECES	SKIDS	WEIGHT						
DDU	0	0	0.00		Postage Saving	\$1,736.06			
SCF	0	0	0.00		Shipping	\$411.23			
NDC	72,336	6	1,508.02		Net Saving	\$1,324.84			
ORIGIN	0	0	0.00						

Example: Freight by Job Report (i.e. TDM Pooled Quote Report by Job)

Run: 8/02/18 5:34PM		TDM Pooled Quote Report by Job							Page: 1
ORIGIN ZIP: 02139									
Pool ID: 1									
Job: 00009113									
05181_UDC									
UDC/Test									
Quote ID: L1-150									
Destination Entry Point	Total Pieces	Total Skids	Total Weight	Transit Days	Postage Saving	Shipping (LTL)	Savings Net		
NDC GREENSBORO, NC 27075	43,450	4	917.30	2	1,042.80	214.86	827.94		
NDC ATLANTA, GA 31195	28,886	2	590.71	2	693.26	196.37	496.90		
Job Totals:									
DISCOUNT LEVEL	PIECES	SKIDS	WEIGHT						
DDU	0	0	0.00		Postage Saving	\$1,736.06			
SCF	0	0	0.00		Shipping	\$411.23			
NDC	72,336	6	1,508.02		Net Saving	\$1,324.84			
ORIGIN	0	0	0.00						

At this point, users can either close the screen by clicking the **Exit** button, or launch/open the quote on the TDM web site to request a shipment by clicking the **Go to Quote** button.

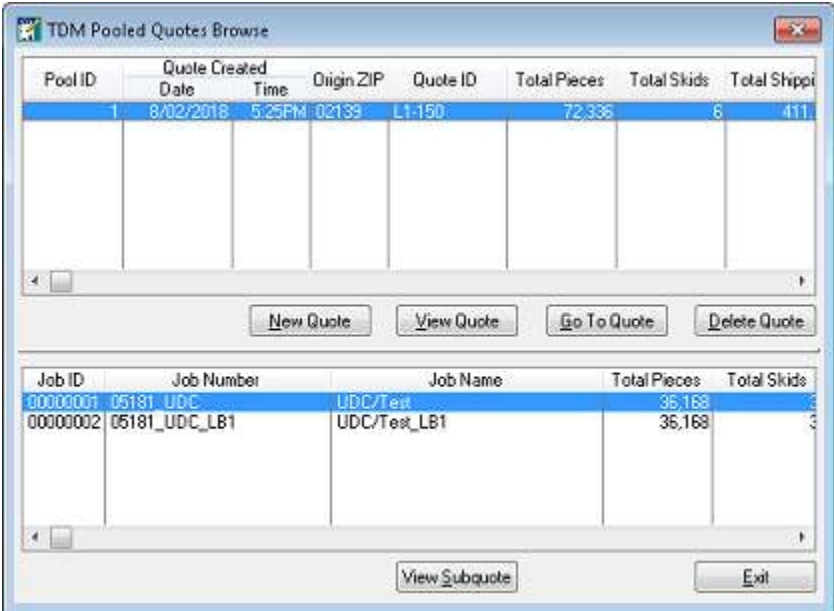


Component Description & Use

i Refer to [Go To Quote](#) in this Guide for information on what happens when the **GO TO QUOTE** button is clicked.

Clicking the **Exit** button will close the screen and return the user to the *TDM Pooled Quotes Browse* screen, where there pooled quote has been saved and assigned an ID number (in the example here, a Pool ID of "1" has been assigned). A summary of the quote displays in the top half of the screen.

The bottom half of the screen displays information from the individual Mail.dat files that were included in the pool (e.g. Job ID, Job Number, and Job Name). Quote information pertaining to each individual Mail.dat file can be viewed by highlighting the Job in the list and clicking the View **Subquote** button.



From the *TDM Pooled Quotes Browse* screen, users can also create a new Pooled Quote (i.e. **New Quote** button), view an existing quote's details (i.e. **View Quote** button), launch/open a Pooled Quote on the TDM web site to request a shipment (i.e. **Go To Quote**), and delete an existing Pooled Quote (i.e. **Delete Quote** button).

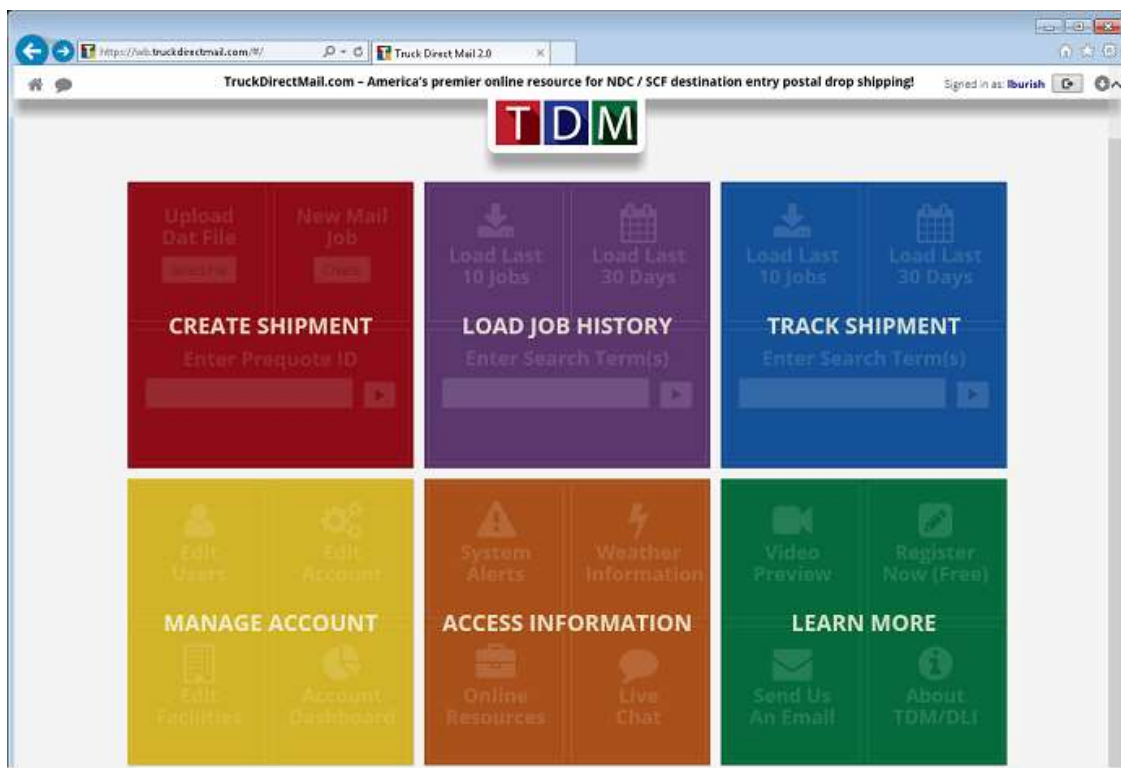
i Refer to [Go To Quote](#) in this Guide for information on what happens when the **GO TO QUOTE** button is clicked.

TDM WEB SITE

Clicking the [wb.TDM](#) button (see image of *Transportation View* screen under [COMPONENT DESCRIPTION & USE](#) above) will launch a web browser and the TDM web site will display.

 **The use of Google Chrome is strongly recommended.**

The home page provides access to all of the TDM functions, which are grouped by subject, i.e. CREATE SHIPMENT; LOAD JOB HISTORY; TRACK SHIPMENT; MANAGE ACCOUNT; ACCESS INFORMATION; and LEARN MORE.




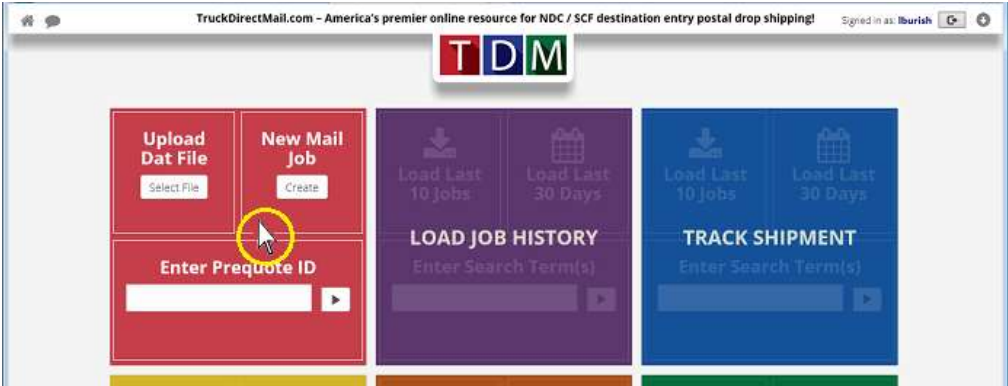
Links to each subject's most commonly used options or functions are provided via that subject's "tile" for easy access.

TDM Web Site

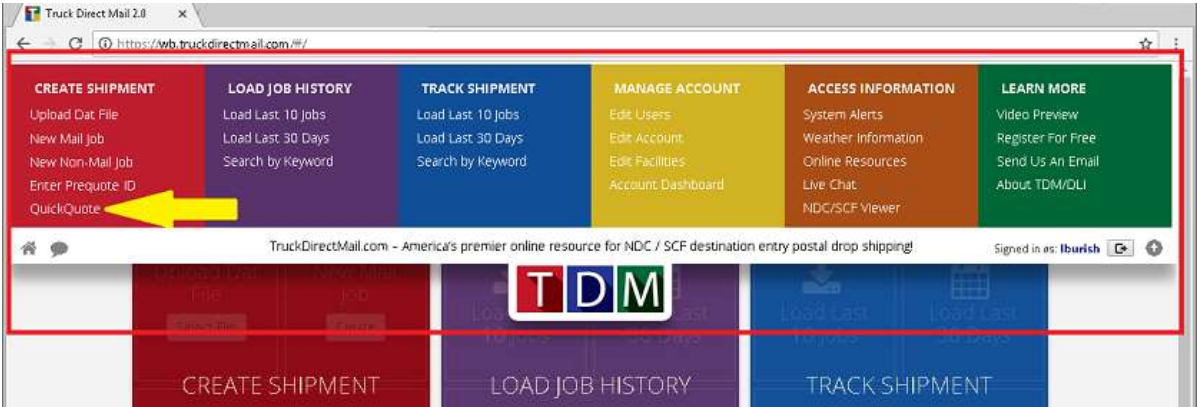
These functions become accessible when the computer’s mouse is hovered over the corresponding tile.

 **Registration is required to use TDM. For instructions, refer to [How To Register](#) in this Guide.**

 **Clients with existing Truck Direct Mail accounts should use their existing accounts when logging into the [wb.truckdirectmail](#) URL from DAT-MAIL. A secondary Window Book/TDM account should not be created/used.**



In addition, the TDM site also contains a “mega-menu” that lists all of the available TDM options or functions, by subject. Functions that are not available via a subject’s tile, can be accessed from the mega-menu. An example of this is the “Quick Quote” function located under the subject “CREATE SHIPMENT”.




To display the mega-menu, click anywhere on the word “TDM” located in the top center of the page, or click on the down arrow located in the top right corner of the page. To close the mega-menu, click on either of these same places.




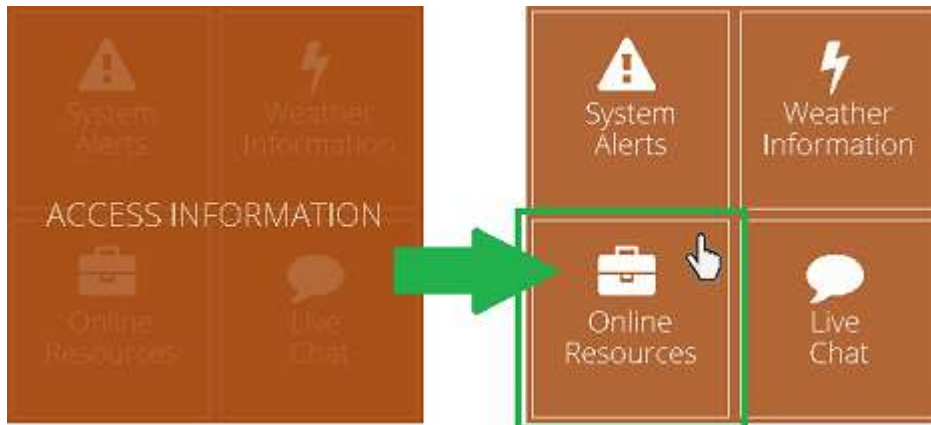
From the TDM site, users can turn quotes received in DAT-MAIL into jobs and submit the jobs for processing. Once a job has been submitted for processing, TDM will e-mail BOLs (Bill Of Ladings) and Skid Fliers as PDF attachments to the e-mail address on file for the user who submitted the job.

In addition, users can manage their jobs, track their shipments, manage their account, access information like system alerts and weather information, live chat with a Direct Logistics representative, view a list of current NDC/SCF facilities, and take advantage of online resources in the way of documentation and videos to help them optimize their use of TDM.

 **To navigate to back to the TDM home screen, click the home button located in the upper left corner of the page. To log out of TDM, click the logout button located near the upper right corner of the page.**



 **To learn more about the services and functionality TDM offers, including user documentation videos, refer to the “Online Resources” option found under ‘Access Information’ on TDM’s website (<https://wb.truckdirectmail.com/#/resources>). Login is required.**



How To Register An Account

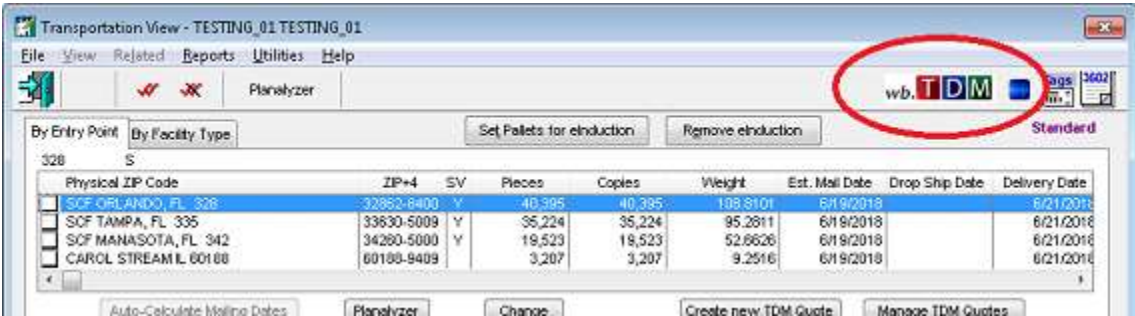
Clients must create an account to be able to use TDM v2. Once an account has been created (i.e. registered), Clients can add multiple users. Please note that the person who completes the registration (i.e. creates the account) is automatically assigned the role of administrator. Additional administrators can be added after the fact.

! *Clients with existing Truck Direct Mail accounts should use their existing accounts when logging into the [wb.truckdirectmail](https://wb.truckdirectmail.com) URL from DAT-MAIL. A secondary Window Book/TDM account should not be created/used.*

To register, open a Chrome browser and go to <https://wb.truckdirectmail.com>, or click on the **wb.TDM** located in the *Transportation View* screen in DAT-MAIL.

! *DAT-MAIL users must use the URL provided (i.e. <https://wb.truckdirectmail.com>) when registering and/or using TDM in conjunction with DAT-MAIL. Failing to use the proper URL will result in operational/service issues.*

! *Window Book and Direct Logistics strongly recommends having Chrome set as the default browser.*



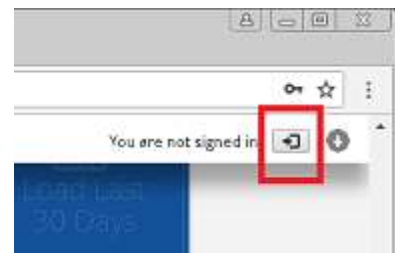
The registration process can be started in one of two ways: either by clicking the "Register Now" button located within the 'Learn More' tile ; or...



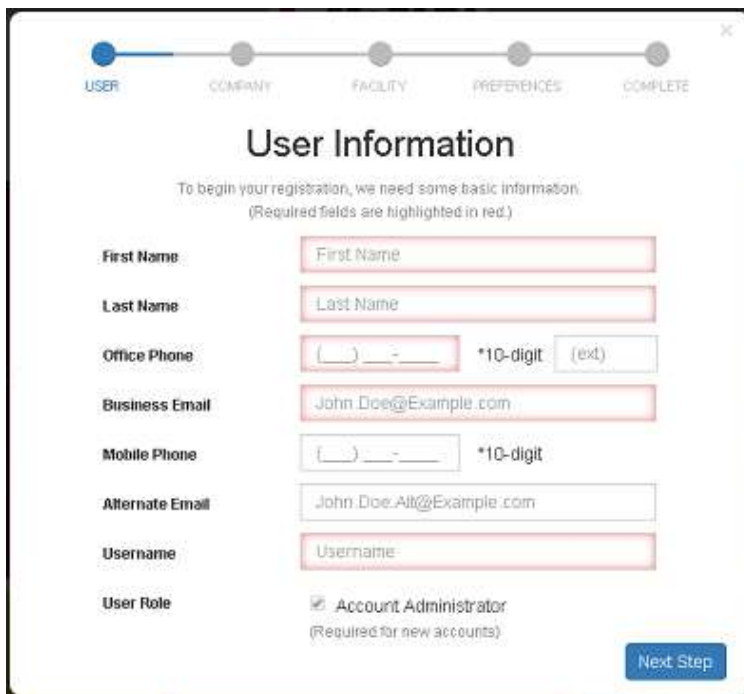
...click the **Create Account** button located on the sign-in page.



The sign-in button is located in the site's upper right corner.



The *User Information* screen will display. At a minimum, fill in the required fields (required fields are outlined in red). When finished, click the **Next Step** button to continue.



TDM Web Site

The Company Information screen will display. At a minimum, fill in the required fields (required fields are outlined in red).

The screenshot shows a web form titled "Company Information" with a progress bar at the top indicating steps: USER, COMPANY, FACILITY, PREFERENCES, and COMPLETE. The "COMPANY" step is active. The form contains the following fields and options:

- Company Name:** Text input field with placeholder "Enter Company Name".
- Website:** Text input field with placeholder "Enter Company Website".
- Type of Company:** Dropdown menu with "SELECT A COMPANY TYPE".
- Physical Address:**
 - Street: Two text input fields for "Address line 1..." and "Address line 2 (if applicable)...".
 - City: Text input field.
 - State: Dropdown menu.
 - Zip: Text input field.
 - Main Phone: Text input field with a format mask () - - .
 - Email: Text input field.
- Billing Address:**
 - Checkbox: Same as physical.
 - Street: Two text input fields for "Address line 1..." and "Address line 2 (if applicable)...".
 - City: Text input field.
 - State: Dropdown menu.
 - Zip: Text input field.
 - Main Phone: Text input field with a format mask () - - .
 - Email: Text input field.
- Shipping Origin:** Checkbox Use this address as our default shipping origin.
- Navigation:** "Go Back" and "Next Step" buttons.

The 'Billing Address' information defaults to be the same as the information entered for the 'Physical Address'. If this is not correct, un-check the option 'Same as physical' and enter the correct billing address.

The 'Physical Address' information is automatically selected to be the default shipping origin. If this is not correct, un-check the option 'Use this address as our default shipping origin'.

When finished, click the **Next Step** button to continue.

The *Shipping Facilities* screen will display. If the option 'Use this address as our default shipping origin' was selected (i.e. checked) on the previous screen, the same information for the shipping origin will populate on this screen. If the option 'Use this address as our default shipping origin' was *not* selected (i.e. checked) on the previous screen, enter the information for the default shipping origin.

Specify (check) if the facility is a 'Shipping Origin' and/or a 'Shipping Destination', and whether the facility is the 'Default Origin' facility.

Make sure to specify the correct 'Operating Hours' and the 'Standard Pickup Window' of time for the facility; as well as, the other operational characteristics called out on the screen (i.e. 'Building Type', Location Type, Mail Type Handled, etc.).

To add additional facilities at this time, click the **Add Another** link.

USER COMPANY FACILITY PREFERENCES COMPLETE

Shipping Facilities

If you did not specify a Default Shipping Origin in the previous screen, do so here.
If you did specify a Default Shipping Origin, you can set up more facilities here.

Facility Type: Shipping Origin (Required for initial setup) Default Origin (Required for initial setup)
 Shipping Destination

Facility Name: TEST COMPANY (default)

Street Address: 300 Franklin St

City: Cambridge

State: Massachusetts Zip: 02139

Operating Hours: 08:00:00 AM to 10:00:00 PM

Standard Pickup Window: 12:00:00 PM to 02:00:00 PM

Building Type: [Dropdown]

Location Type: [Dropdown]

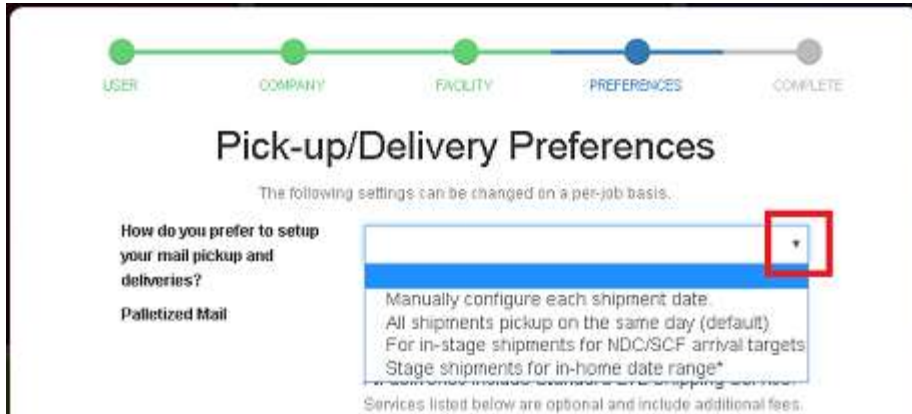
Mail Type Handled: Letters Flats

Vehicle Access: Tractor Trailer Box Van

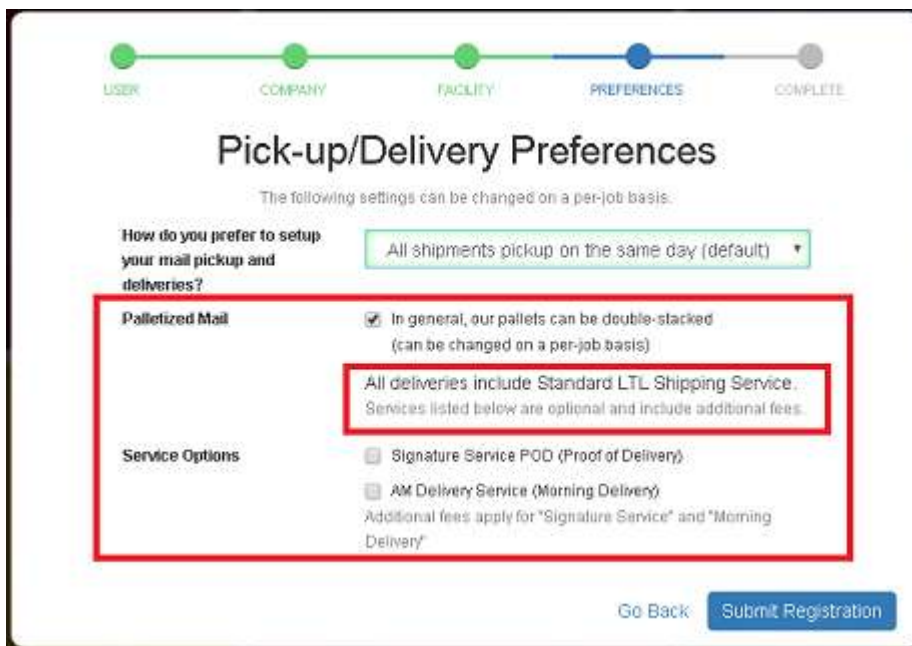
Additional Facility Info: Does this facility have elevated loading docks?
 Does this facility have a forklift onsite?

Add Another Go Back Next Step

When finished, click the **Next Step** button to continue. The *Pick-up/Delivery Preferences* screen will display.



Using the drop-down provided, select the preference for setting up mail pickup and deliveries.



Disable (i.e. un-check) the default confirmation that the company's pallets can be double-stacked if necessary. This is a default setting only and can be changed on a per-job basis, if need be.

Also enable any necessary or preferred 'Service Options'. **Please note** that any enabled Service Options will include additional fees.

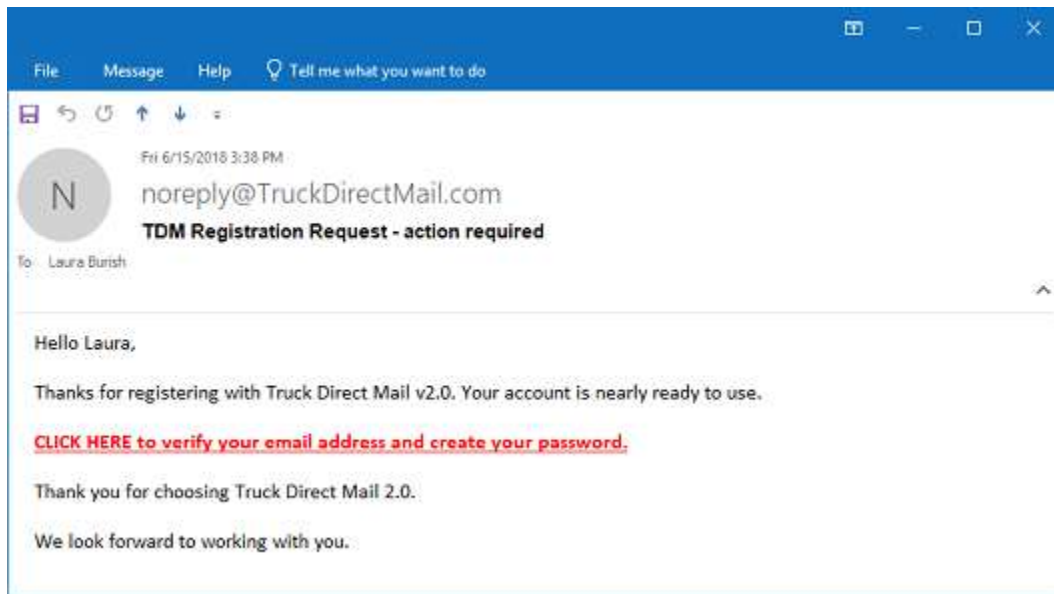
When finished, click the **Submit Registration** button. The *Thank You for Registering!* screen will display.



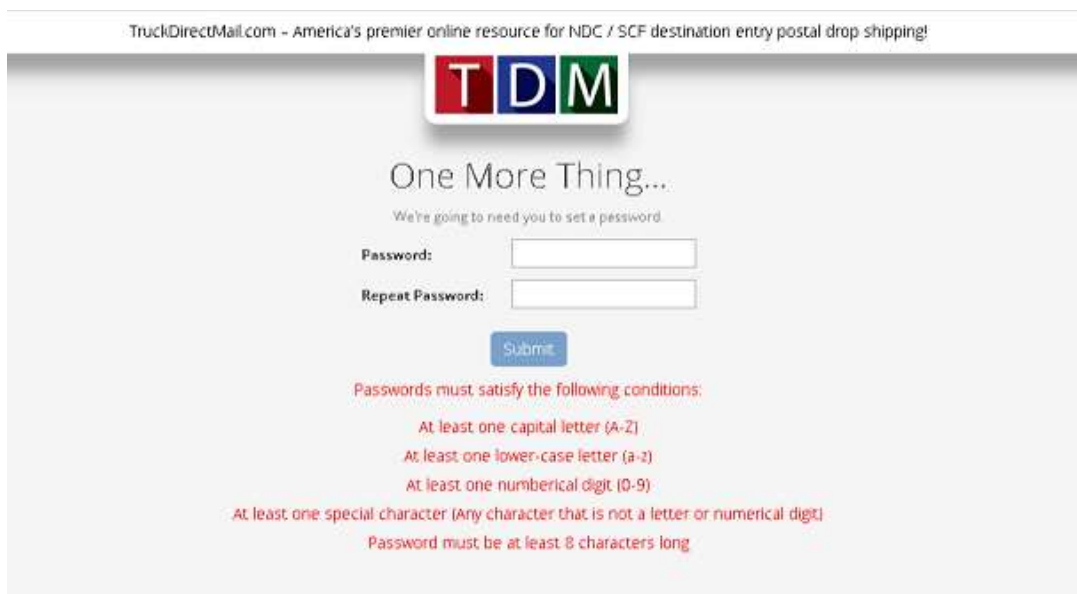
TDM will send an e-mail to the address entered by the registrant that contains a link used to verify the e-mail address and create a password (do not forget to check the 'Junk' folder in the event the e-mail does not show up in the 'Inbox' in a timely fashion).

! *The registrant must click the link to complete the registration process! If the e-mail ends up in the registrant's 'Junk' folder, the e-mail must be moved to the 'Inbox' for the link to function.*

! *Make sure to [whitelist the e-mail addresses both Window Book and Direct Logistics](#) uses to insure the necessary e-mail communication between DAT-MAIL, TDM and the Client can occur.*

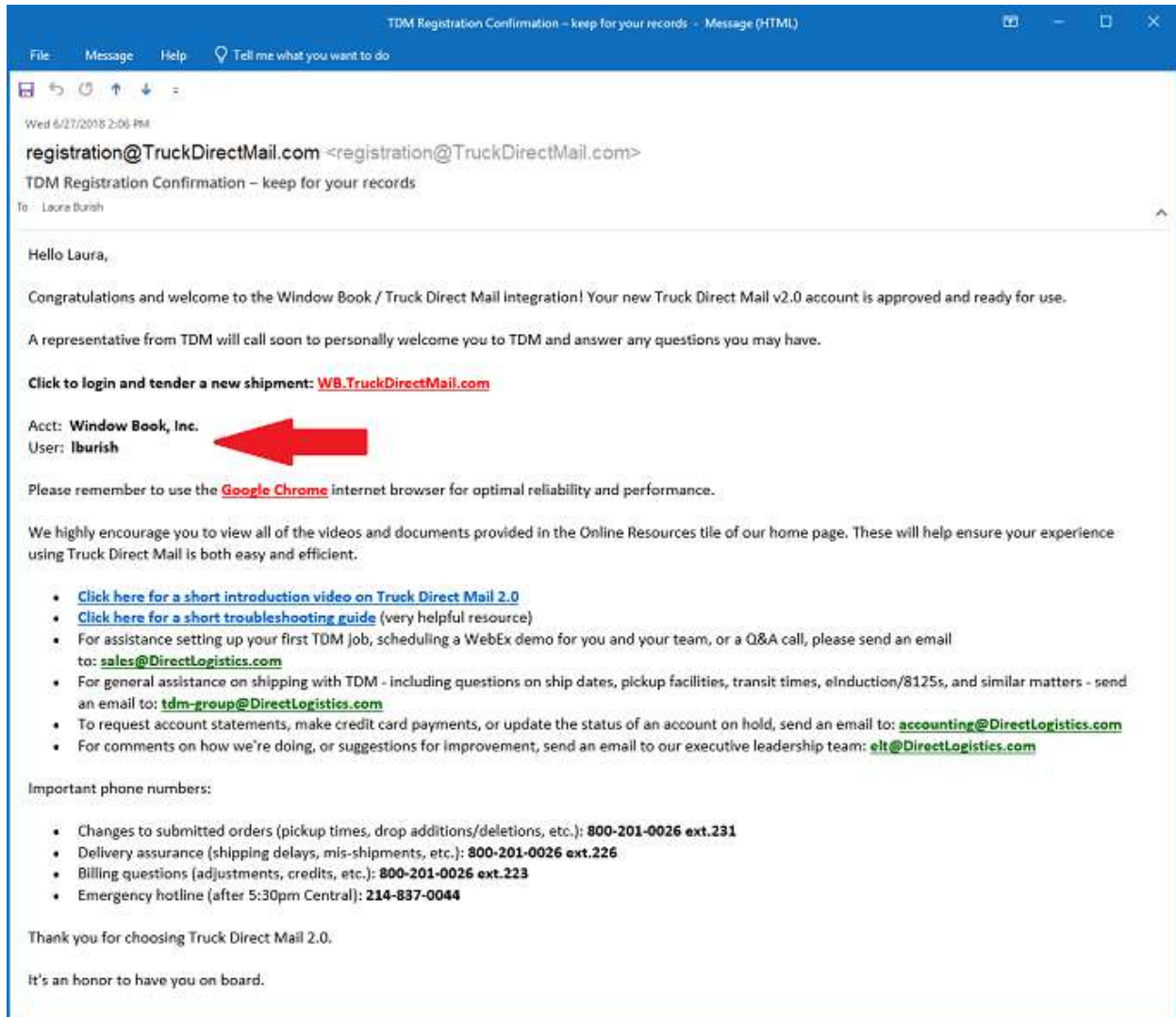


Clicking the link launches a web browser and the following page will display. Enter a valid password and confirm it before clicking the **Submit** button.



TDM Web Site

Once the **Submit** button is clicked, a “Congratulations...” e-mail will be sent to the Administrator. The e-mail contains the registrants user ID and a lot of helpful information for getting started and using TDM.



The account is ready to take advantage of all the benefits of using DAT-MAIL and TDM!

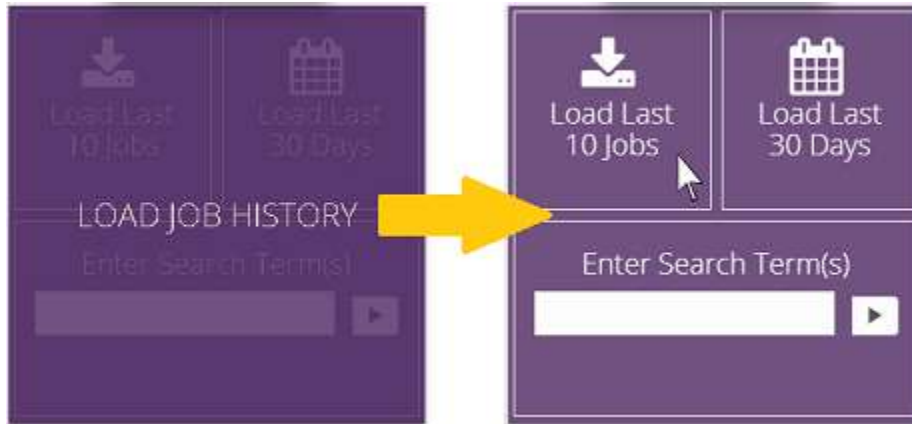
Create A Shipment

For instructions on how to create a shipment from a quote, refer to [Go To Quote](#) in this Guide. For instructions on how to create a shipment from a Draft, refer to [CREATE A SHIPMENT FROM A DRAFT](#).

Manage Jobs In TDM

All jobs, including jobs saved as drafts are accessible and managed through the TDM. Jobs are access via the LOAD JOB HISTORY panel on TDM’s home screen. From the panel, users have the option to load

their company's last 10 jobs, or the jobs from the past 30 days. In addition, they can search for jobs using a specific search term. The search term uses all or part of a job number, name, or description.



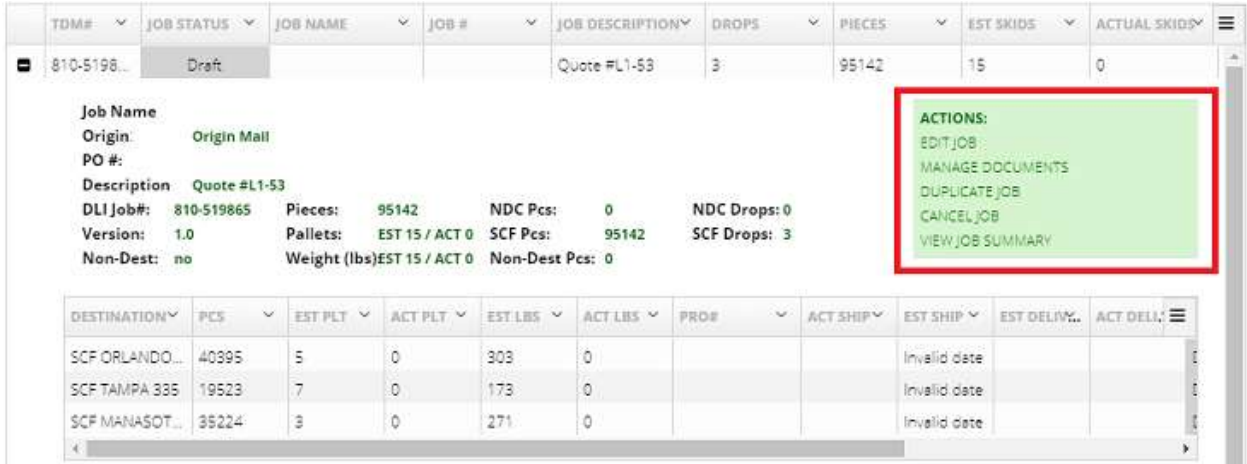
When one of the options is selected, the *Job History* screen will display.

TDM#	JOB STATUS	JOB NAME	JOB #	JOB DESCRIPTION	DROPS	PIECES	EST SKIDS	ACTUAL SKIDS
810-5198...	Draft			Quote #L1-53	3	95142	15	0
810-5198...	Draft			Quote #L1-60	1	0	1	0
810-5198...	Draft			Quote #L1-60	1	0	1	0
810-5198...	Draft	AMB	AMB1	Quote #L1-60	1	0	1	0
810-5197...	Cancelled			Quote #L1-58	1	0	1	0
810-5197...	Draft			Quote #L1-53	3	0	15	0
810-5197...	Draft			Quote #L1-57	1	0	1	0
810-5197...	Draft			Quote #L1-56	0	0	0	0
810-5197...	Draft			Quote #L1-56	0	0	0	0
810-5197...	Draft			Quote #L1-56	0	0	0	0

The Client's existing jobs (i.e. shipped, canceled, drafts, etc.) that meet the selected search/load criteria are listed in grid form, along with their status. Users can update the list of jobs that are displayed by using one of the criteria found in the 'QUICK LOAD' section of the screen.

To view the details and available options for each job, click the plus '+' icon at the beginning of the job's line item (see image above) to expand it.

An 'Actions' panel will be included that contains the options available to the user.



From the 'Actions' panel, the user can edit the job, manage the documents for the job (i.e. download document and upload documents to TDM), duplicate the job for ease-of-use, cancel the job (note: jobs that have already been set up for shipment cannot be canceled), and view the job summary.

CREATE A SHIPMENT FROM A DRAFT

If a user wishes to create a shipment from a Draft, they need to select the job/Draft (i.e. expand the job's line item) in the *Job History* screen and click the 'Edit Job' option in the Action panel. The *Edit Existing Job* screen will display. Make any necessary edits and click the **VALIDATE AND SUBMIT JOB** button when finished.

Delivery Plan Options

There are multiple delivery plan options to choose from when setting up a job. A default option should be set in the Client's account profile; however, delivery plan options can be changed at the job level if necessary. Below is a description for each plan.²

All shipments pick up on the same day

Whether a Client has NDC or SCF shipments, all of them will be picked up on the same day.

² Direct Logistics, *TDM v2.0 Pick-up and Delivery Planning Options.mp4*. Accessed June 20, 2018. <https://wb.truckdirectmail.com/#/resources>.

Stage shipments for NDC / SCF arrival targets	
User sets NDC arrival date target	User sets SCF arrival date target
System calculates transit days, weekends, and holidays to determine appropriate outbound shipping dates for each shipment in the job.	
NDC shipments pick up on specified ship date	SCF shipments pick up on specified ship date
Shipment delivers to NDC on specified date ³	Shipment delivers to SCF on specified date ³
Mail enters the USPS delivery stream	
Mail arrives in-home	
Stage shipments for in-home date range	
User sets single in-home arrival date range target ⁴	
System calculates transit days, weekends, holidays, and average NDC / SCF processing days to determine appropriate outbound shipping dates	
NDC shipments pick up on specified ship date	SCF shipments pick up on specified ship date
Shipment delivers to NDC	Shipment delivers to SCF
Mail enters the USPS delivery stream	
Mail arrives in-home	
Manually set each shipment date	
Choose each date to ship out each individual drop in the job. Whether it's an NDC or SCF, shipment dates/pick-up dates can be set individually.	
We will deliver all mail to the local carrier terminal	
Users are responsible for getting the mail from their facility to the local carrier terminal. TDM will work with the user to determine which terminal that is.	

³ These are delivery date targets and not absolute service level guarantees

⁴ The USPS offers no delivery guarantees for standard and advertising class mail. TDM's algorithm uses 20 years of historical data to make the best guess possible for when mail is going to arrive in-home.