WindowBook
Automating Information

PostalWeb Desktop Dashboard™

User 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 existing eDM10X document	Revision		1st version (publication) of product Guide that uses new product name (i.e. PostalWeb Desktop Dashboard), replacing the name eDM10X, coinciding with Dec. 2018 of software (i.e. version 10.8.17.203).
Updated information	Revised	ABOUT THIS GUIDE	Updated copyright information.
Updated sections	Revised	Throughout Guide	Updated images to coincide with product name change and software version 10.8.17.203 (and newer).
Updated sections	Revised	Throughout Guide	Replaced “eDM10X” with “PostalWeb Desktop Dashboard”.
Updated sections	Revised	Throughout Guide	Replaced “MailDrop Engine” with “PostalWeb Connector”.
Updated sections	Revised	Throughout Guide	Updated references to the PostalWeb Desktop Dashboard software system to the Postal Web Desktop Dashboard software solution.
Updated section	Revised	INTRODUCTION	Updated general information about the product, removed information about the Automation Scheduler and updated references to “eDM10X software system” to “PostalWeb Desktop Dashboard solution”.
Updated section	Revised	POSTALWEB DESKTOP DASHBOARD SOFTWARE SOLUTION	Added information about the Automation Scheduler.

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CHANGE	TYPE	LOCATION IN GUIDE	DETAIL
Updated section	Revision	COMPONENT INSTALLATION LOCATIONS & REQUIREMENTS	Added information about the Automation Scheduler.
Updated section	Revision	COMPONENT IDENTIFICATION	Updated information to include the What's New button/link. Also updated the 3rd footnote with PostalWeb Connector information for clarity on provisioning, and the Attention note to direct the user to stop and start the PostalWeb Connector Service before updating the PostalWeb Connector software.
Updated section	Revision	GET SUPPORT ICON	The 'Get Support' feature no longer contains the "Like" function. Updated section to reflect this change.
Updated section	Revision	GET SUPPORT ICON	Added information about two additional options under the 'Add Attachments' section of the Open a Ticket screen.
Added section	New	WHAT'S NEW BUTTON	Added information about the 'What's New' button that displays on the application's home screen.
Updated section	Revision	Statement Viewer - Description & Use	Added information about 'Open Folder' function and updated corresponding screen images.

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GETTING STARTED

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. It is important that the information provided be read and thoroughly understood before proceeding.

Where displayed, this Troubleshooting icon denotes helpful operational hints and tips for the subject matter at hand. The information is intended to provide resolutions for some of the more common issues that can occur during operation. It is important that the information provided be read and thoroughly understood before proceeding.

PURPOSE

This User Guide is intended to provide feature information and operational instructions for PostalWeb Desktop Dashboard™ and the Statement Viewer. Installation instructions are provided separately (refer to the *PostalWeb Desktop Dashboard Installation & Update Guide).*

The *PostalWeb Desktop Dashboard Installation & Update Guide* provides the following:

- Instructions for a new or first-time installation of a PostalWeb Desktop Dashboard software solution; and
- Instructions for updating an existing PostalWeb Desktop Dashboard software solution as software updates are released by Window Book.

All Guides can be viewed or downloaded from the *User Guides* page via the Support Portal on Window Book's website (https://windowbook.na2.teamsupport.com/login/user). Registration and/or login is required.

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INTRODUCTION

Window Book Inc.'s PostalWeb Desktop Dashboard is a revolutionary .Net-based system that enables companies to keep track of all the information about their Mail.dat® PostalWeb Desktop Dashboard submissions to *PostalOne!*®. PostalWeb Desktop Dashboard, keeps track of all the activity coming back from the USPS MDR Client™ (MDR Client) regarding those jobs (including error reports and status updates). It is a system that enables Clients to easily view the data on multiple workstations without the need for each user to log into *PostalOne!* It enables workers to know the production status of the jobs without having to access the information on the *PostalOne!* site.

In addition, PostalWeb Desktop Dashboard also provides the following:

- QuickFix – a function that assists the user by allowing them to correct *PostalOne!* validation errors as they are reported by the system, and then immediately resubmit the corrected or 'fixed' files to *PostalOne!* helping to avoid costly delays. QuickFix allows the user to fix failed files using error logs to guide them through the process.
- A Statement Viewer – a separate module launched from within PostalWeb Desktop Dashboard that allows users to view, print, save, and send their USPS®-generated documents (i.e. confirmation and registration pages, finalized statements, UPDs, etc.), right from their Desktop. Specific document types (e.g. finalized statements) can be set to auto-print to a certain printer, such as one located in an accounting department, as soon as the statements become available. To activate the Statement Viewer, a Client-registered PostalWeb® site is required; and
- Get Support - a function that allows users open support tickets with Window Book's Support Team from any screen within the software – including attaching log files or any other pertinent file(s) to help expedite the troubleshooting process.

PostalWeb Desktop Dashboard requires the use of Window Book's PostalWeb Connector™. It is an important component of any PostalWeb Desktop Dashboard solution and is responsible for the following:

- Enabling automatic transfers of Mail.dat files to be uploaded to *PostalOne!*;
- Updating the MS-SQL database with all the information in files that are uploaded;
- Staging the files that need to wait for *PostalOne!* processes to complete before the next time updates on that job are to be uploaded;
- Sending email notifications to Client-managed recipients containing a Submissions Summary Report that provides a snapshot of different events that have taken place for job submissions, by MDR Client type;
- Sending email notifications to Client-managed distribution lists, of *PostalOne!* receipt and log events; as well as, warnings that will not fail a job, but could negatively impact mailings, scorecards, and other performance measurement criteria used by the USPS, if left unheeded;
- Enabling the automatic transfer of QuickFix edited files back to DAT-MAIL™ (if applicable);
- Enabling the automatic download of the USPS MDR Client software when updates are released by the USPS;

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- Enabling the Client to limit the editing capabilities of individual users/operators within their PostalWeb Desktop Dashboard software;
- Enabling communication between *PostalOne!* and a Client's PostalWeb site for a specific Location in order to view Location-specific *PostalOne!* events on their PostalWeb site;
- Enable the transfer and delivery of a Client's various *PostalOne!* statements in PDF and/or XML formats, including customizing the download location and name, and the file names of the downloaded statements;
- Easily access pertinent log files for troubleshooting purposes;
- Adjust the number of simultaneous uploads processes the system will perform to optimize performance; and
- Easily maintain various logs and database sizes that could impact system performance if left unchecked.

The setup and configuration of the PostalWeb Connector functions described above are dependent upon what components of a PostalWeb Desktop Dashboard software solution (e.g. PostalWeb and/or DAT-MAIL) are installed and being used.

PostalWeb Desktop Dashboard is designed to work with or without Window Book's DAT-MAIL software. This means that companies that do not have DAT-MAIL will get tremendous benefit from this specialized Mail.dat editor, but those that do have DAT-MAIL will also enjoy these benefits in addition to what DAT-MAIL already provides. This Guide provides installation and configuration instructions for both environments; as well as, instructions on how to update the existing software.

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POSTALWEB DESKTOP DASHBOARD SOFTWARE SOLUTION

Depending on the software solution being installed, using the PostalWeb Desktop Dashboard may require the additional installation, registration and configuration of the following software components: PostalWeb; DAT-MAIL; the Window Book Automation Scheduler™, and the PostalWeb Connector with the USPS MDR Client (MDR Client).

Registration or license keys are required to operate PostalWeb Desktop Dashboard , PostalWeb Connector, DAT-MAIL, and the Automation Scheduler. All four components are registered separately using registration or license keys received from Window Book. Contact a Window Book Client Services Representative for more information (refer to the CONTACT INFORMATION section in this User Guide).

Registration or installation and configuration instructions for all of the components of the different PostalWeb Desktop Dashboard software solutions can be found in the *PostalWeb Desktop Dashboard Installation & Update Guide*, which can be viewed or downloaded from within the Support Portal on Window Book's web site at: https://windowbook.na2.teamsupport.com/login/user. Registration and/or login is required.

This User Guide assumes all necessary components of the PostalWeb Desktop Dashboard software solution have been installed, configured, and registered prior to use.

COMPONENT INSTALLATION LOCATIONS & REQUIREMENTS

Although this User Guide does not provide installation and configuration instructions for the software components of the various PostalWeb Desktop Dashboard software solutions, it is important to know where each component is installed to better understand how the system works; as well as to assist if any troubleshooting should be necessary.

A PostalWeb Desktop Dashboard software solution can be installed on a single computer in a stand-alone environment, or as part of a server with workstation(s) environment.

In a stand-alone environment the installation requirements are simple in that all of the software components must be installed on the single computer being used, and local drives should be entered for the installation paths.

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

The information provided in the table below is for a server with workstation(s) environment is intended as a quick-reference only. Refer to the PostalWeb Desktop Dashboard Installation &

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Update Guide for more detail. The Guide can be downloaded via the Support Portal on Window Book's web site at https://windowbook.na2.teamsupport.com/login/user. Registration and/or login is required.

SERVER	WORKSTATION(S)
POSTALWEB (if applicable)	
PostalWeb is a web-based component and does not involve a traditional installation on a computer or server. The registration/on-boarding process for a Client's company-specific PostalWeb site should occur on the same computer that PostalWeb Connector resides on; however, for ease-of-use during the required provisioning process. Once a company-specific URL is created and the provisioning process is completed with PostalWeb Connector, a Client's PostalWeb site can be accessed from any computer (server or workstation) for use.	Once a company-specific URL is created and the provisioning process is completed with PostalWeb Connector, a Client's PostalWeb site can be accessed from any computer (server or workstation) for use.
License/Registration:	
A traditional license or registration key is not needed for the registration/on-boarding process; however, a Client will have to have a Postage Statement ID (PSID) to complete the registration process.	N/A
Installation Path:	
Since there is no installation of software on a computer, the requirement(s) for installation paths (local drive or UNC) is not applicable for PostalWeb.	N/A
Software Updates:	
Updates to a Client's PW site are automatic. No action is required by the Client.	N/A

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SERVER	WORKSTATION(S)
DAT-MAIL (if applicable)	
Install on the server. Select 'Server' as the installation type during the installation process.	Install on all workstations. Select 'Workstation' as the installation type during the installation process.
License/Registration:	
A registration key is required for the 1st time/new installation - not for software updates.	Server registration carries over to each workstation and does not require the re-entry of the registration key (1st time/new installs and software updates).
Installation Path:	
During installation, use a local drive for the program installation path and the two data folders. Do NOT use mapped drives.	During installation, use a local drive for the program installation path. All workstations should point to the same **data** folders as the server installation using UNC path names. Using UNC path names for the two data folders is required. Do NOT use mapped drives.
Software Updates:	
Software updates must be downloaded from the Window Book web site and installed on the server. Re-entry of the product registration key is not required.	Once the server software is updated, the next time DAT-MAIL is launched on a workstation, the workstation version will automatically be updated to match the server. Re-entry of the product registration key is not required.
Automation Scheduler (required only if DAT-MAIL is installed)	
Install on the server (same machine as DAT-MAIL). Required for the Automatic Postal Updates plug-in used by DAT-MAIL.	N/A
License/Registration:	
A registration key is required for the 1st time/new installation - not for software updates.	N/A

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SERVER	WORKSTATION(S)
Installation Path:	
A local drive can be used for the installation; a UNC path name is not necessary. Do NOT use a mapped drive.	N/A
Software Updates:	
Software updates must be downloaded from the Window Book web site and installed on the server. Re-entry of the product registration key is not required.	N/A
PostalWeb Connector	
Install on the server.	N/A
License/Registration:	
A Window Book-provided registration key is required for 1st time/new installation (not for software updates).	N/A
Installation Path:	
A local drive can be used for the product installation; a UNC path name is not necessary. Do NOT use a mapped drive.	N/A
Software Updates:	
Software updates must be downloaded from the Window Book web site and installed on the server. Re-entry of the product registration key is not required. The PostalWeb Connector Service must be started and run a few seconds (at most) and then stopped before installing the PostalWeb Desktop Dashboard software update.	N/A

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SERVER	WORKSTATION(S)
PostalWeb Desktop Dashboard	
Install on the server.	Install on all workstations.
License/Registration:	
A Window Book-provided registration key is required for 1st time/new installation (not for software updates).	Entry of the registration key must occur on each workstation for the 1st time install only. Each workstation installation uses the same registration key as the server installation. Re-entry of the registration key is not required for software updates.
Installation Path:	
Use a local drive for the program installation path. UNC path names are not necessary. Do NOT use mapped drives.	Use a local drive for the program installation path. UNC path names are not necessary. Do NOT use mapped drives.
Software Updates:	
Software updates must be downloaded from the Window Book web site and installed on the server. Re-entry of the product registration key is not required. Make sure to install the PostalWeb Connector software update and start and stop the corresponding service before installing the PostalWeb Desktop Dashboard update.	Software updates must be downloaded from the Window Book web site and installed on each workstation after the update to the server installation occurs. Re-entry of the product registration key is not required.

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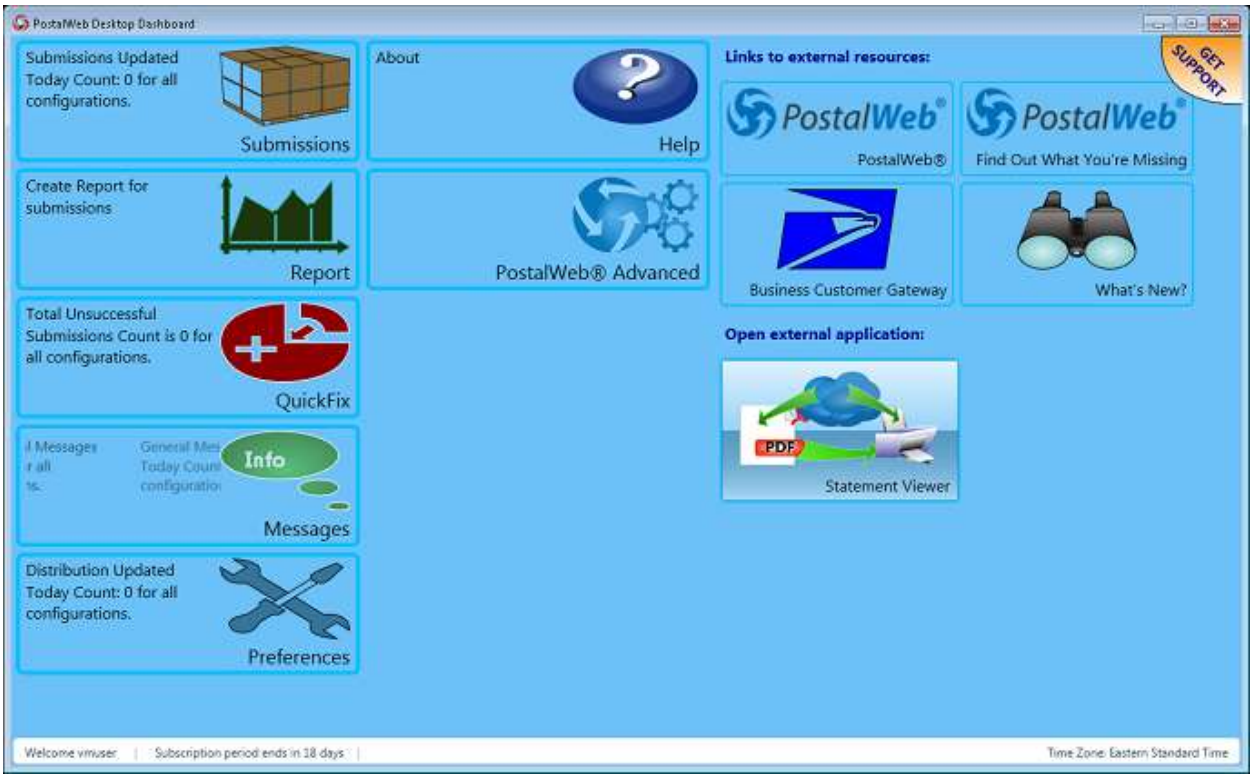
COMPONENT IDENTIFICATION

The PostalWeb Desktop Dashboard's home screen contains the following functional buttons for accessing its various screens and features: **Get Support** button; **Submissions** button; **Report** button; **Staging** button; **Quick Fix** button; **Jobs Routing** button[1]; **Messages** button; **Preferences** button; **Help** button**; PostalWeb Advanced** button[2]; and the **Statement Viewer**[3] button.

In addition, the PostalWeb Desktop Dashboard home screen also contains the following links to external resources for ease of use: a link to the **PostalWeb** log-in page; a link to a **PostalWeb – Find Out What You're Missing** page; a link to the USPS' **Business Customer Gateway** log-in page; and a **What's New** page. Clicking the links launches a web browser that will display the site/page designated in the link.



Some of the buttons contain a scrolling marquee which provides a real-time snapshot summarizing the information contained within that section of PostalWeb Desktop Dashboard (e.g. the Submissions' button scrolling marquee provides the user a snapshot of the total submission count, and a total submission count for the present day). PostalWeb Desktop Dashboard uses an automatic refresh rate of every 3 seconds (approximate) to assist in providing this information in as timely of manner as possible.

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[1] *The **Jobs Routing** button will only display if the 'Tracking/Postage Service Providers' feature is enabled in PostalWeb Connector.*

[2] *The **PostalWeb Advanced** button will only display if a client-specific PostalWeb site has been registered and provisioned.*

[3] *The **Statement Viewer** button will only display if a client-specific PostalWeb site has been registered and a site-location provisioned in PostalWeb Connector.*

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If a newer version of the PostalWeb Desktop Dashboard software becomes available on the Window Book web site, PostalWeb Desktop Dashboard's home screen will automatically update to display a **Download Latest Version** button. Clicking this button will launch a web browser and display the *Software Downloads* page of the Window Book web site, where the latest version of the PostalWeb Desktop Dashboard software (and PostalWeb Connector) will be available.

The latest publicly released version of PostalWeb Desktop Dashboard is dependent on having the most recent publicly released version of PostalWeb Connector installed as well. Update PostalWeb Connector and stop and start the PostalWeb Connector Service before updating PostalWeb Desktop Dashboard!

Descriptions of each functional button and links are provided below.

GET SUPPORT ICON

Clicking on, or hovering the mouse over the **GET SUPPORT** icon located in the top right corner of the screen automatically displays or expands the *Get Support* screen and the **Open a Ticket** option contained therein.

Selecting (clicking) the 'Open a Ticket option displays an *Open a Ticket* window. This function allows users to automatically open support tickets directly from PostalWeb Desktop Dashboard with Window Book's Support Team. Users can then monitor their tickets and communicate with Window Book via the Support Portal on Window Book's web site.

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- **User Contact Information** 1: This information is automatically populated using the contact information recorded in PostalWeb Desktop Dashboard's registration screen (refer to Registration for more information). This is the contact information that Window Book's Support Team will use for any needed follow-up; therefore, change the contact information if necessary;
- **Ticket** 2: This section allows the user to assign identifying characteristics to the ticket:
  - **Severity**: Select from the drop-down list provided. The available options are: Normal; Critical; Urgent – SYSTEM DOWN; and Low;
  - **Support Issue**: Select from the drop-down list provided: The available options are: Support/Troubleshooting; Question; Updates to software; Software installation; PostalOne!; File/log review; Registration code; MS SQL; Other; and API Support; and
  - **Subject**: The subject line is automatically populated based on the 'Support Issue' assigned. This field can be edited if the user feels it is necessary;
- **Describe the problem** 3: Type in a description of the problem and any details that led up to the problem occurring and anything that was done after it occurred. This same area should also be used if the user simply has a question pertaining to the product;
- **Add Attachments** 4: The Open a Ticket function automatically attaches the main PostalWeb Desktop Dashboard log to each ticket that is created to help Window Book's Support Team resolve any issue faster. In addition, there are three other default options that can also be attached: the PostalWeb Desktop Dashboard log archive; the Receipt Table; and the PWC Config Table if the user feels it could be pertinent to resolving the issue at hand;
- **Add Attachments** 5: Users can add other attachments like screen images or job files if they feel they are important to help explain the problem, and ultimately resolve the issue. Simply click the

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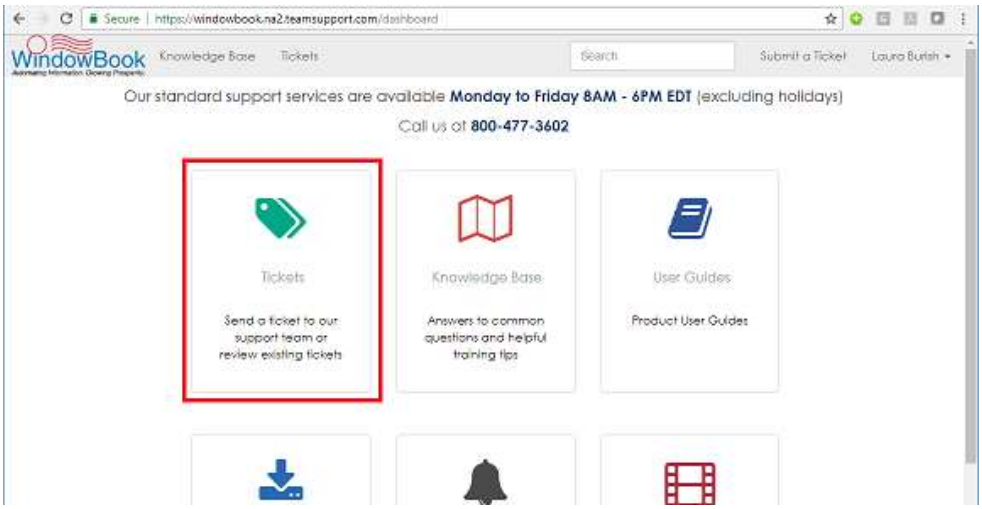
Add Attachment button, navigate to and select the file to attach to the ticket (multiple files can be attached). The file name of the attached file(s) will display in the window. If a wrong file was accidentally selected, simply click the file's corresponding **Delete** button so it does not get attached to the ticket.

When all the necessary information has been provided, click the **Open a Ticket** button. The window will automatically close. A support ticket will be created with Window Book, and an e-mail notification will be sent to the e-mail address provided on the ticket.

Clients can view their tickets via the Support Portal on Window Book's web site. Registration and/or login is required. Once logged in, click the **Tickets** button.



The **GET SUPPORT** button is available from within any PostalWeb Desktop Dashboard screen, including the Statement Viewer.

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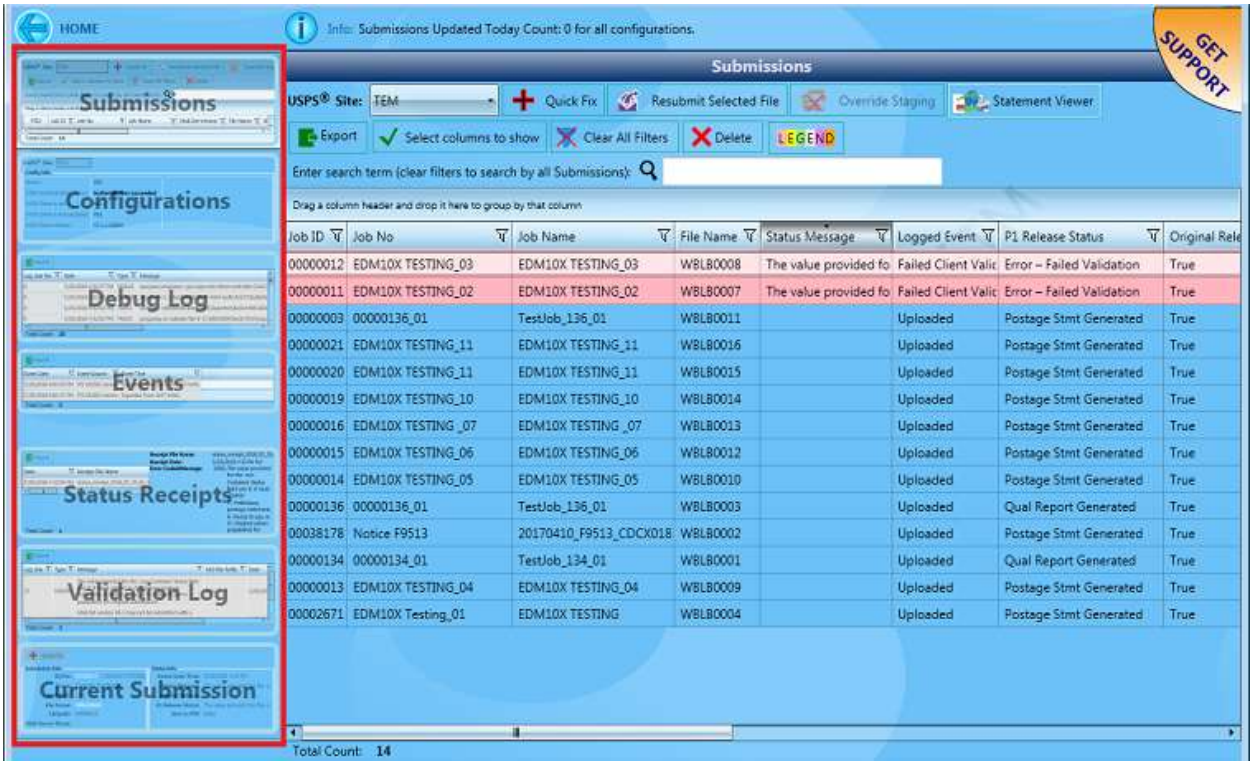
SUBMISSIONS BUTTON

Clicking the **Submissions** button displays the PostalWeb Desktop Dashboard *Submissions* page.

The *Submissions* page is comprised of 7 panels: *Submissions; Configurations; Debug Log; Events, Status Receipts; Validation Log;* and *Current Submission*. Buttons representing each panel are listed vertically along the left side of the screen. To view a panel, click its corresponding button.

The user can go back to PostalWeb Desktop Dashboard's main or home screen at any time by clicking the back or home arrow located in the uppermost left corner of the page.



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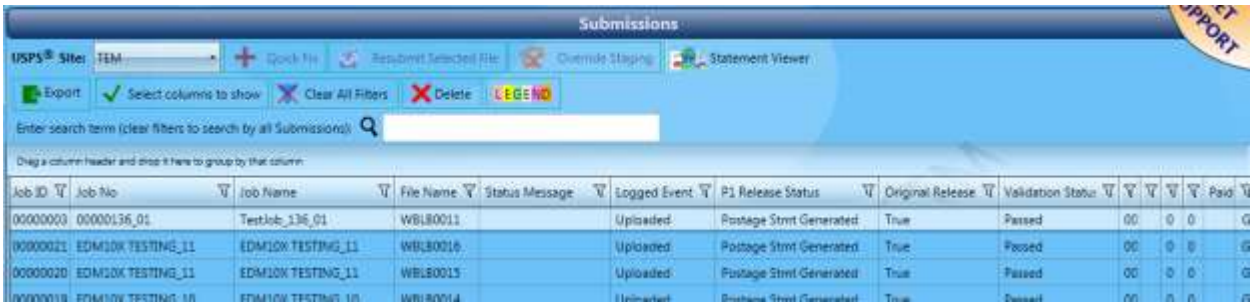
Submissions Panel



The Submissions panel displays the list of jobs that have been exported or submitted to *PostalOne!*. The details of each job that are pertinent to the submission process are displayed in column-format, e.g. 'Job ID', 'Job No', 'Job Name', 'Mail.dat Version', 'File Name', 'Status Date', 'Status Time', 'Status Message', etc. Additional job information is provided that allows users to get important detail about the job and/or submission from a single source (i.e. 10X) without having to log into P1 or access other applications. For example, the PSID associated with a submission, the number of pieces in a Mail.dat file or a job can be found in either the 'PDR Count' or 'PBC Count' columns, what the payment status of a submission is, and the e-Doc Sender CRID associated with the submission, just to name a few. In addition, if a Client has their own PostalWeb (PW) site, the Submissions panel notifies them when a particular job is available on their PW Desktop Dashboard. When the job is available on the PW site, the box in the "Sent to PW" field will be checked.

For a list of all the available fields/columns in the 'Submissions' panel, refer to APPENDIX 1 in this Guide.

For important information on the reporting of the or the payment status information of a submission and/or the % of pieces paid for and the # of pieces paid for in a submission, refer to Current Submissions Panel in this Guide.

In addition, from the Submissions panel, users can view, send, print, and auto-print their USPS-generated documents for completed jobs (i.e. UPD, confirmation and registration pages; finalized and eVS statements; 3607's; PostalWizard statements; and Qualification Reports) by clicking the **Statement Viewer** button. There are certain requirements for being able to use the Statement Viewer in PostalWeb Desktop Dashboard. Refer to the STATEMENT VIEWER BUTTON section in this Guide for more information.

The Submissions panel provides extensive capabilities for finding, filtering, and sorting the displayed jobs associated with the selected configuration. PostalWeb Desktop Dashboard's QuickFix function can also be accessed for a job or submission that has failed validation from the Submissions panel. The individual components that make up the Submissions panel are discussed below.

USPS® SITE

The jobs or submissions displayed in the Submissions panel are determined by which MDR Client configuration is selected. Configurations are created and managed in PostalWeb Connector. They are

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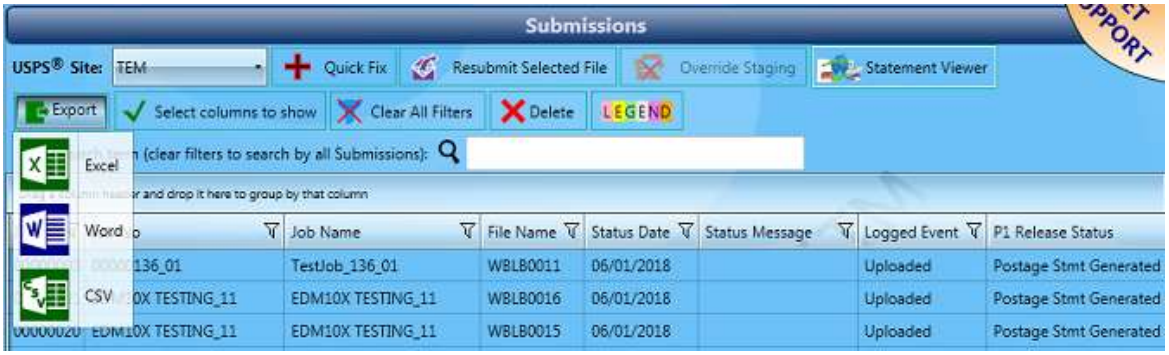
used to define which MDR Client is to be used for submissions; as well as, specifying the necessary folders used for housing submissions on the server, based on their status and the various receipt and log files returned from *PostalOne!*.

Only those MDR Clients that have been created in MDE are available for selection within PostalWeb Desktop Dashboard, whether they are active. Choose a configuration by clicking the down arrow and selecting the configuration from the list.

EXPORTING DATA

All the job or submission data displayed in the jobs list can be exported outside of PostalWeb Desktop Dashboard in one of three file formats: Excel, Word, and Comma Separated Value (CSV). To export the data:

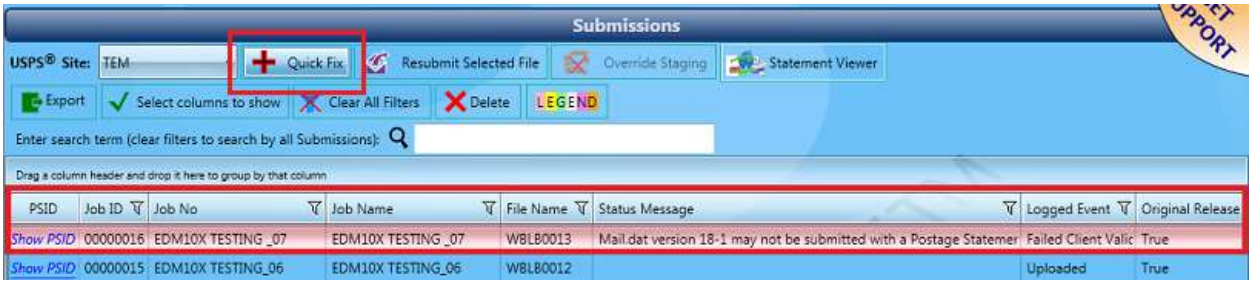
- Click the **Export** button at the top of the Submissions panel and select the preferred file format;



- A *Save As* dialog will display. Select the location where the file should be saved to and enter a file name; and
- Click the **Save** button to save the data or click the **Cancel** button to cancel the export process.

QUICKFIX

PostalWeb Desktop Dashboard's QuickFix feature can be accessed from the Submissions panel for jobs or submissions that have failed validation or have been rejected. To access QuickFix from the Submissions panel, select the failed or rejected file and click the **QuickFix** button.



The 'QuickFix' button will not be visible for those users whose login information has been assigned a role of "User" within PostalWeb Connector, specifically the 'Role Security' screen. This

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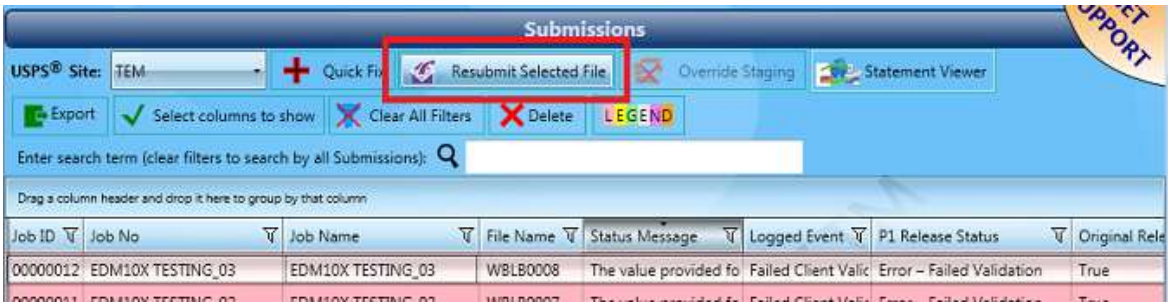
applies to all PostalWeb Desktop Dashboard screens or panels where the 'QuickFix' button normally resides (refer to the "PostalWeb Connector Installation & User Guide" for more information on configuring the Role Security screen. The Guide is available via the Support Portal on Window Book's web site at: https://windowbook.na2.teamsupport.com/login/user. Registration and/or login is required).

If a file does not fail or has not been rejected, the **QuickFix** button will not be enabled (it will be grayed out). More information on how to use the QuickFix feature can be found in the Using QuickFix section in this Guide.

RESUBMIT SELECTED FILE

The **Resubmit Selected File** button allows users to re-submit a Failed or Rejected job from the *Submissions* panel, without having to make any changes to the Mail.dat.

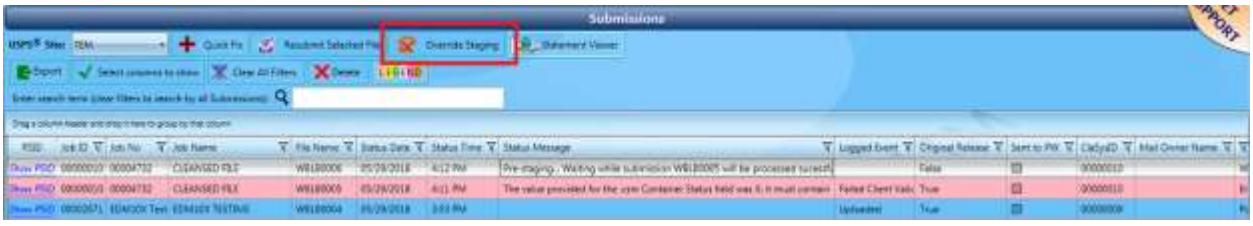


This button can be used:

- When a job has failed and has a status message of "MDR Error Uploading – Re-submit via QuickFix";
- When a job uploaded to *PostalOne!* out of order. For example, the pay file gets uploaded before the plan file. Both jobs have failed, so users can select the plan file and click the **Resubmit Selected File** button. Once the upload begins, the pay file can be selected, and the **Resubmit Selected File** button can be clicked for it; and
- When, from time to time, the USPS MDR Client returns false positives. Users can simply select the file and click the **Resubmit Selected File** button.

OVERRIDE STAGING

The **Override Staging** button will circumvent the staging logic for a single submission and allow an upload to occur when the normal staging logic would not.



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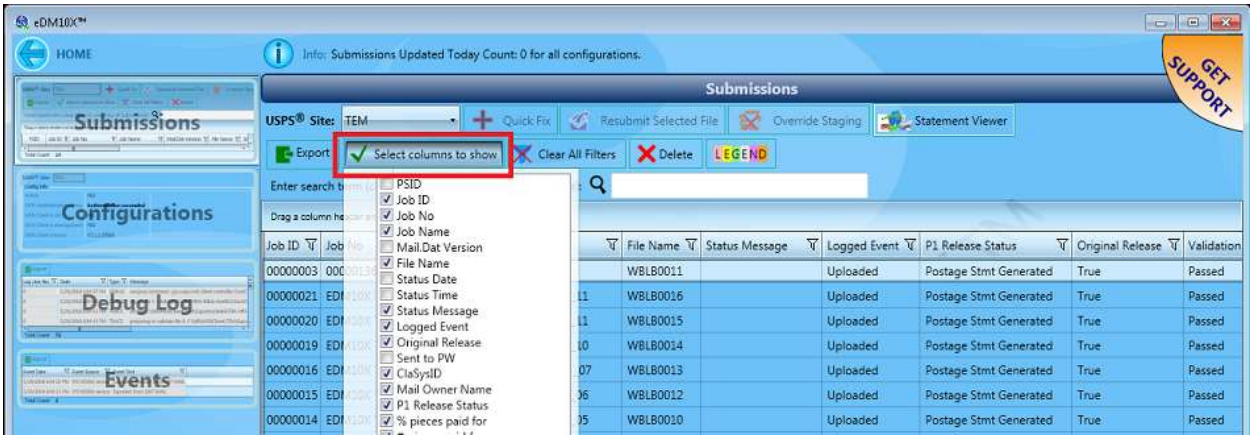
It is very important to understand how the OVERRIDE STAGING button works and use it only as intended. Using the OVERRIDE STAGING button in ways that it was not intended could result in jobs being uploaded out of order, the need to cancel or delete jobs, or cause Historical Header Sequence Number issues. Any of these issues could require the paid intervention of Window Book's Professional Services Team! Refer to OVERRIDE STAGING BUTTON for more information.

DISPLAYING COLUMNS

The jobs list is made up of various columns (i.e. Job ID, Job No., Job Name, etc.) that can be manipulated in various ways.

The columns that are displayed are controlled by the user via the **Select columns to show** button. When the **Select columns to show** button is clicked, a list of the columns that make up the jobs list are displayed.

The default setting for this control is that all the boxes are checked (i.e. all columns are selected to display or show). To hide a column, un-check the corresponding box. As an example, in the screen image below, the 1st column, "PSID" is not checked; therefore, that column does not display in the Submissions panel, whereas "Job ID" is checked and is displayed.



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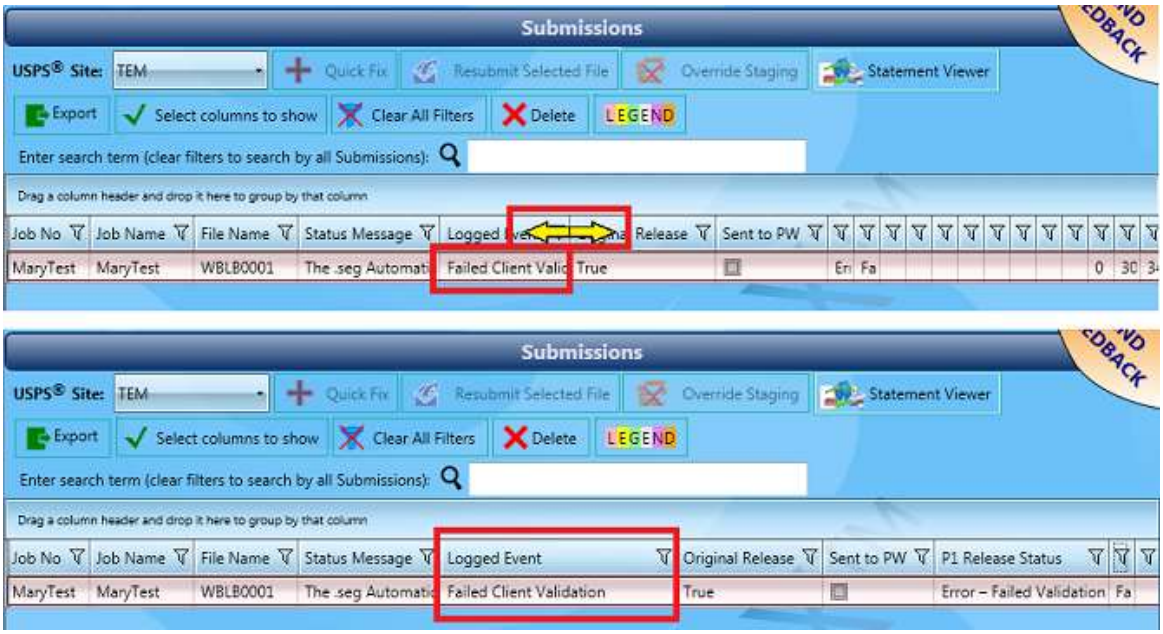
Individual columns can also be horizontally re-sized by the user (width only) by clicking and dragging the right margin of the column header either to the left (narrower) or right (wider). When the column header's right margin is selected appropriately, the mouse pointer will change in appearance (↔).



DELETE

A selected submission that has been rejected or has failed can be deleted by clicking the **Delete** button located at the top of the *Submissions* panel.

Only submissions that are rejected or failed can be deleted. The two delete options will be ghosted (i.e. unavailable) for a selected submission if that submission has not been rejected or has not failed.

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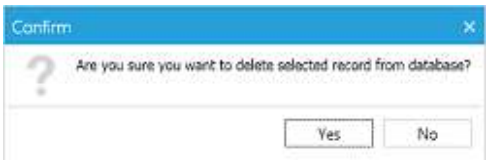
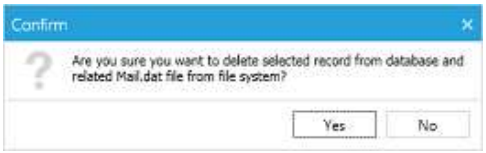
Rejected or failed submissions can be deleted from PostalWeb Desktop Dashboard in one of two ways:

- The submission or job line can be removed from PostalWeb Desktop Dashboard (i.e. the *Submissions* panel) by selecting the 'Delete Submission' menu option. When this option is clicked, the selected submission is removed from the *Submissions* panel; however, the corresponding job or Mail.dat file remains in the 'Rejected' or 'Failed' folder on the server (or computer in a sing installation environment). When the 'Delete Submission' option is clicked, a confirmation dialog will display.



  Click the **Yes** button to continue with the deletion and resolve the dialog, or click the **No** button to stop the deletion process and resolve the dialog; or

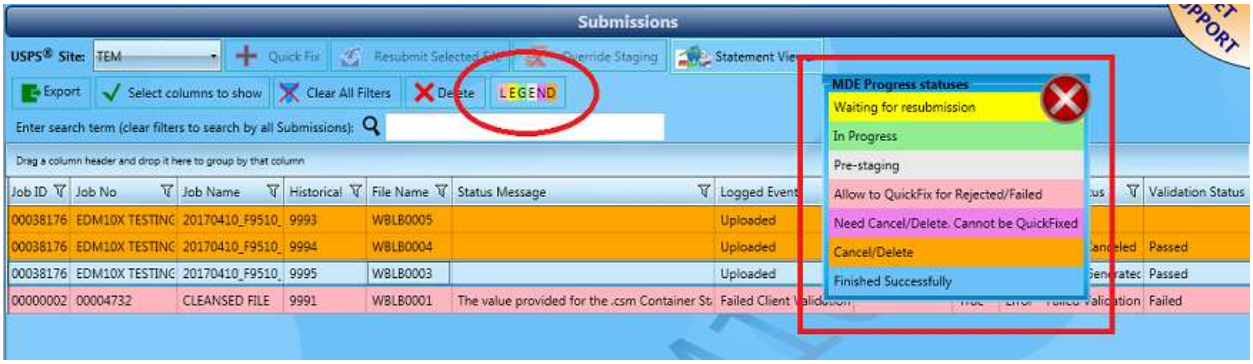
- The submission or job line can be removed from PostalWeb Desktop Dashboard (i.e. the *Submissions* panel) and the job or Mail.dat file deleted from the corresponding 'Rejected' or 'Failed' folder on the server (or computer in a single installation environment) by clicking the 'Delete Submission and Mail.dat file' menu option. When the 'Delete Submission and Mail.dat file' option is clicked, a confirmation dialog will display.



  Click the **Yes** button to continue with the deletion and resolve the dialog or click the **No** button to stop the deletion process and resolve the dialog.

LEGEND

Clicking the **LEGEND** button launches a window that contains a visual representation of the different colors and their associated status that can display in the jobs grid of the Submission panel. Click the 'X' located in the top right corner of the window to close it.

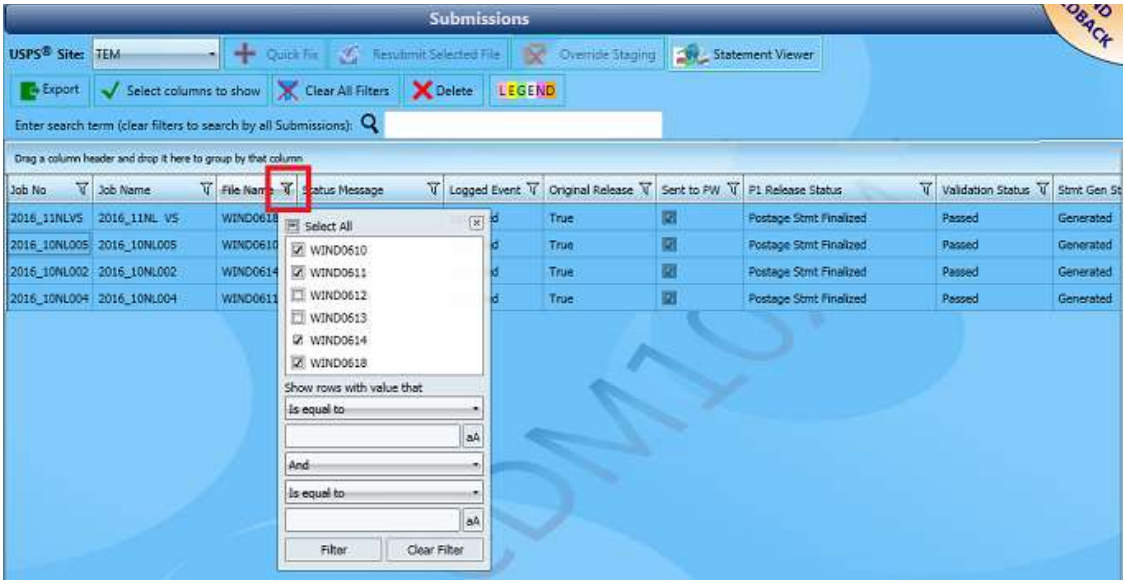


The line items for submissions are color coded to help differentiate between submissions' statuses. This visual colorization is generated based on the different events, receipts, and conditions that get reported to/by PostalWeb Connector.

Progress Statuses	Color
Waiting for resubmission	Yellow
In progress	Green
Pre-staging	Gray
Allow to QuickFix for Rejected/Failed submissions	Red/Pink
Need to be Canceled or Deleted – Cannot be QuickFixed	Fuchsia
Has been Canceled, Reversed, or Deleted	Orange
Finished successfully	Blue

FILTERING, SORTING, AND GROUPING DATA

The data displayed in each column can be manipulated for easier referencing. To add a filter, or clear an existing filter, click on the filter icon located to the right of the applicable column header. When the filter icon is clicked a control panel is displayed that allows the user to apply certain filters to the data in that particular column or clear existing filters that had been previously applied to that column's data.



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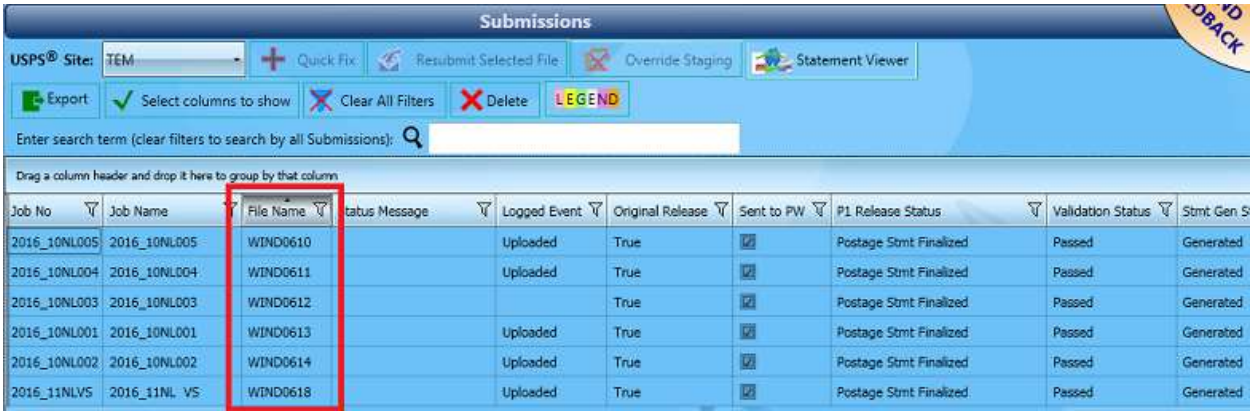
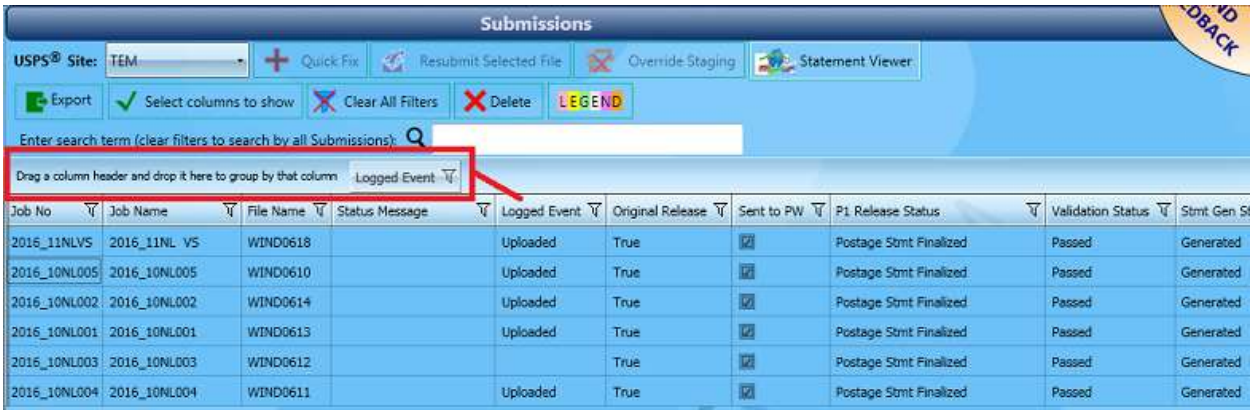
Columns can be sorted by clicking the column header (an arrow will appear in the column header indicating whether the sort order is ascending or descending). In the image below, the 'File Name' column has been sorted.

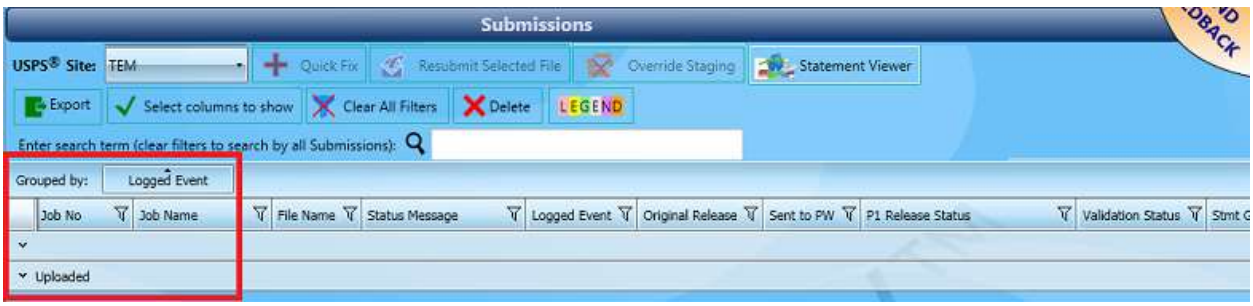


Clicking the column header three times will return to the original sort order state. Holding the shift key on the computer's keyboard while clicking multiple column headers allows multi-column sorting.

In addition to the basic filtering and sorting features, grouping is also supported. To group columns, click and drag a column-header up to the grouping area located above the job list column headers (in the example below, the "Logged Event" column-header was dragged and dropped into the grouping area above the jobs list):



Once a column-header is dragged to a grouping area, the values found in that column are grouped together and a summation of the data is displayed:



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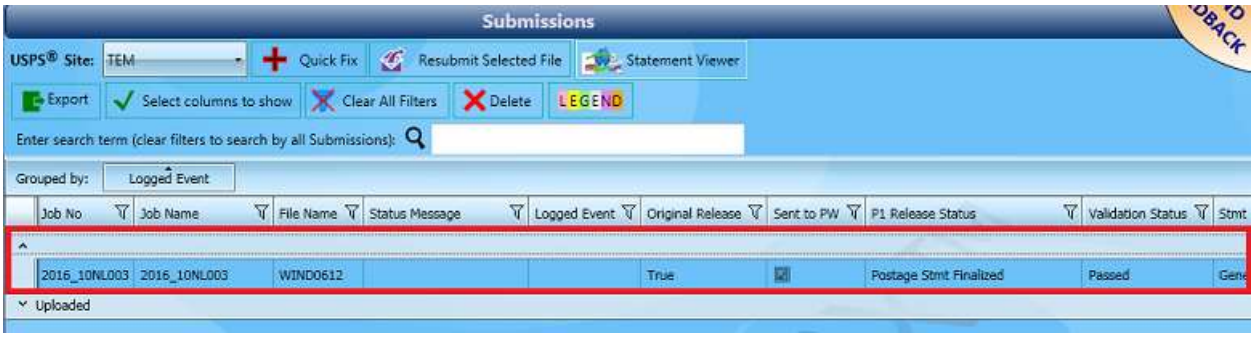
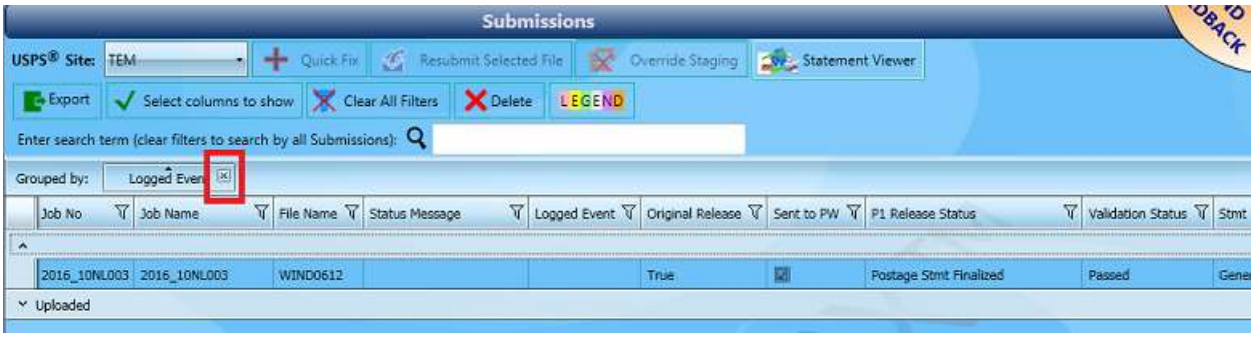
Click on a grouping to view the corresponding jobs that contain that data value (in the example below, the job listed all has a null value in the Logged Event field):



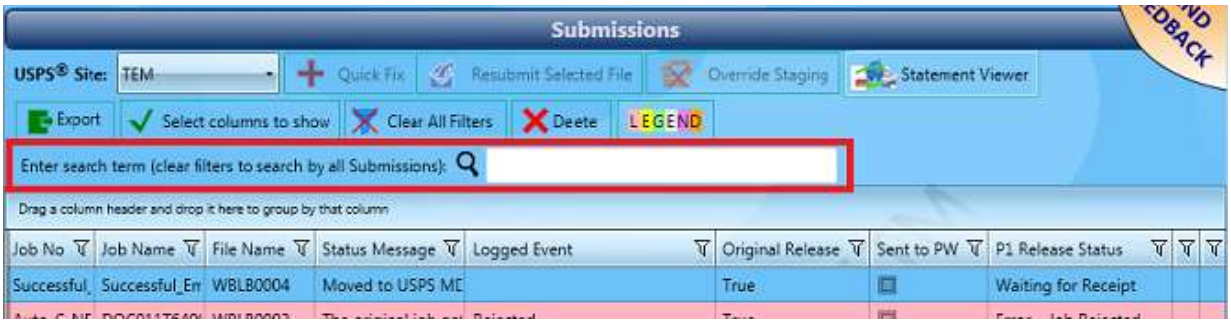
To turn off or remove a grouping, click the 'x' located to the right of the grouped column-header located in the grouping area (the 'x' will only be visible when the cursor is hovered over the top of the grouped item).



The grouping of multiple columns is supported.

SEARCH FEATURE

The *Submissions* panel contains a 'Search' feature that allows the user to search for various jobs that meet the numeric criteria entered into the Search field. The search criteria can consist of text and/or numbers.



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As data is entered into the Search field, PostalWeb Desktop Dashboard will automatically begin displaying the results that meet the search criteria (searches matching data are performed in all columns).

To search the entire jobs list, make sure to clear any existing filters before entering the search criteria.

To remove the filtered view of jobs based on the search criteria, delete the data entered in the Search field.

PAGING CONTROL & REFRESH SETTINGS

Job lines or submissions are displayed in the jobs list newest or most recent to oldest. Once the number of job lines or submissions exceeds the length of the screen, a scroll bar will display along the right of the screen for viewing older data.

The PostalWeb Desktop Dashboard application automatically applies a status refresh every 3 seconds (approximate) for viewing the current database contents in a timely manner.

If a change to an MDR Client configuration in PostalWeb Connector occurs while the PostalWeb Desktop Dashboard application is open, the PostalWeb Desktop Dashboard software will automatically re-fresh on its' own.

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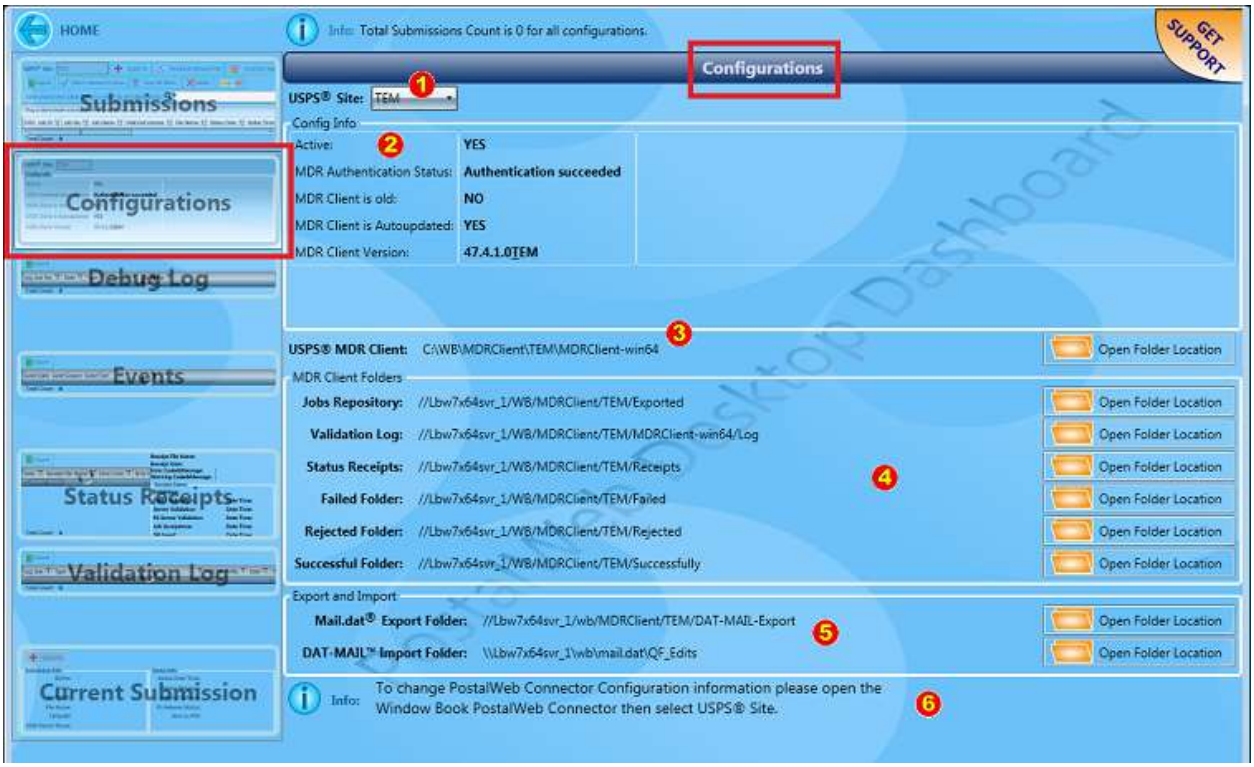
Configurations Panel

Clicking the **Configurations** button displays the *Configurations* panel.

The user can go back to PostalWeb Desktop Dashboard's main or home screen at any time by clicking the back arrow located in the uppermost left corner of the page.



PostalWeb Connector is the source of the configuration information displayed in PostalWeb Desktop Dashboard's Configurations panel. In the top left corner next to 'USPS® Site', a drop-down list provides the various MDR Client configurations created in PostalWeb Connector for selection 1. In the screen example above, 'TEM' is selected.

The 'Config Info' 2 part of the Configurations panel displays the details of the selected USPS® Site configuration (see 1), such as whether or not the USPS® Site configuration is active or inactive, if the MDR Login information used by the USPS® Site has successfully authenticated or not, whether or not the MDR Client software is 'old', and whether or not the MDR Client software has auto-updated or not.

The 'USPS® MDR Client' field 3 displays the folder and folder location where the MDR Client software is installed on the server.

In the 'MDR Client Folders' section of the Configurations panel 4, the path names and folder locations being used by the selected USPS® site are displayed; specifically, for the 'Exported' folder (i.e. Jobs Repository); the 'Logs' folder (i.e. Validation Logs); the 'Receipts' folder (i.e. Status Receipts); and all the

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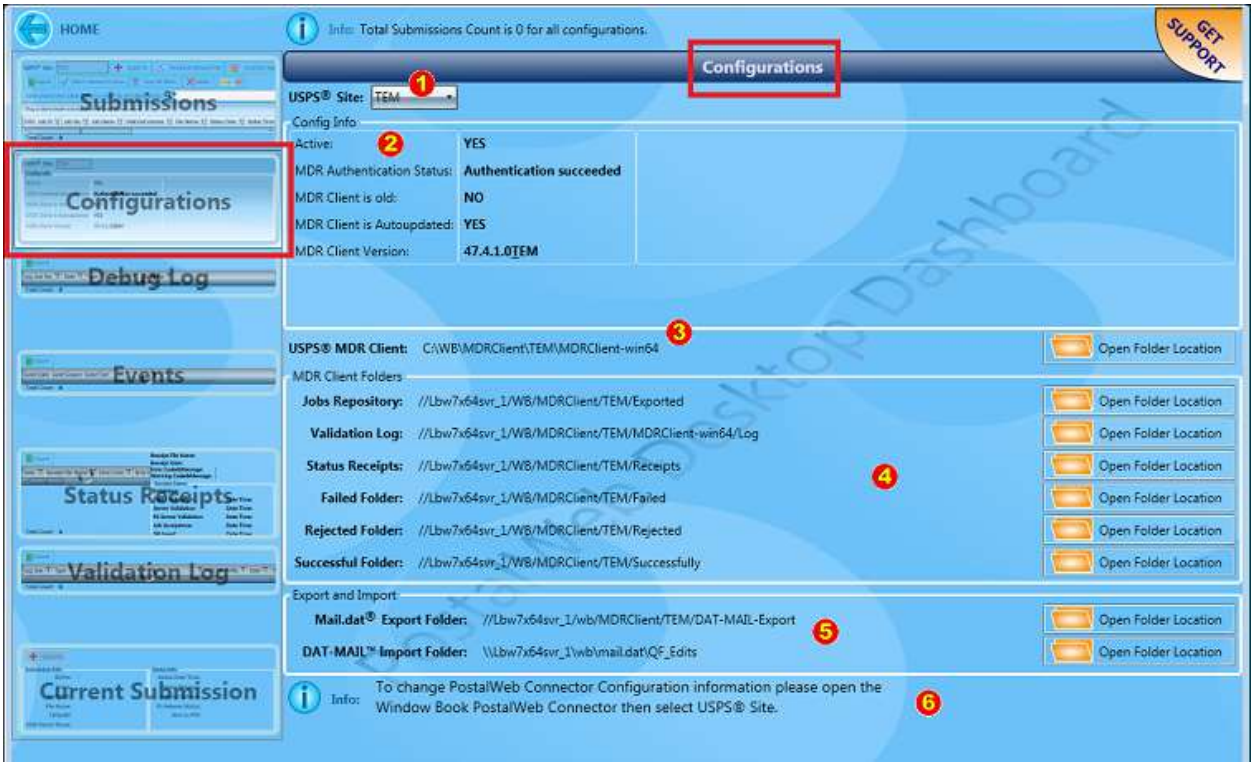
file status types (i.e. Failed, Rejected, Successfully). In addition, the user can view each folder's contents by clicking the folder's corresponding **Open Folder Location** button.

It is important that the files contained within the MDR Client folders not be moved, deleted, or manipulated in any way. Doing so could cause data corruption and/or loss of data, some of which could be irreparable.

It is important that the location of the MDR Client folders not be changed or moved. Doing so can cause unwanted system behavior and/or loss of production time.



In the 'Export and Import' section of the Configurations panel, the path name and file location being used by the selected USPS® Site are displayed for the 'Mail.dat Export Folder' (i.e. 'DAT-MAIL-Export') and the 'DAT-MAIL Import Folder' (i.e. "QF_Edits" – this folder is named by the user; therefore, the name of this folder can vary)5. In addition, the user can view a folder's contents by clicking the folder's corresponding **Open Folder Location** button.

It is important that the files contained within the 'Mail.dat Export Folder' and the 'DAT-MAIL Import Folder' not be moved, deleted, or manipulated in any way. Doing so could cause data corruption and/or loss of data, some of which could be irreparable.

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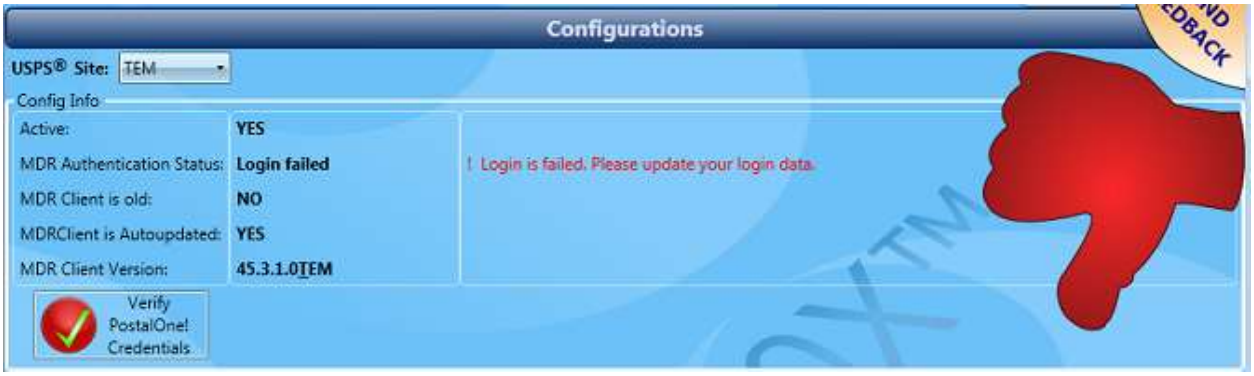
It is important that the location of the 'Mail.dat Export Folder' and the 'DAT-MAIL Import Folder' not be changed or moved. Doing so can cause unwanted system behavior and/or loss of production time.

At the bottom of the *Configurations* panel is an informative note 6 on how to change the PostalWeb Connector Configuration (i.e. referring to the MDR Client), if necessary.

An MDR Client configuration (i.e. USPS® Site) can be in one of three states or statuses: Valid; Active; and Inactive.

- **Valid** (files will be moved and/or updated). See image above as an example. Note that the word "Valid" does not display on the screen, but the system is reporting that the configuration is Active (i.e. Active = "YES") and there are no other errors being reported;
- **Active** (files may or may not be moved or updated). A configuration can be Active (i.e. Active = "YES"; but may not be Valid, meaning it is in an Active state, but requires further attention such as updating the P1 login credentials or updating the MDR Client software. If either of these two P1 issues occur, the Configurations panel will update and display a red thumbs down graphic or image which serves as an obvious flag to the user that something needs immediate attention.



If it the MDR Authentication Status is reporting "Login failed" (see image above) (i.e. P1 access has been denied), it is due to one of two issues: a problem with P1 itself; or the P1 login credentials being used are no longer valid.

To determine this if the problem is P1-related, click the **Verify PostalOne! Credentials** button. The following *Confirm* dialog will display.

Confirm the PostalWeb Connector's service is running before clicking the VERIFY POSTALONE! CREDENTIALS button! The service must be running for the verification process to occur.

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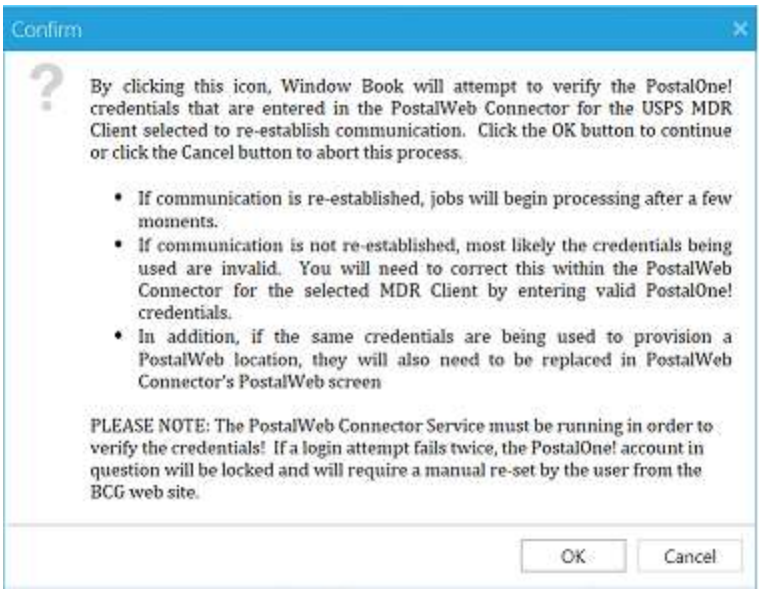
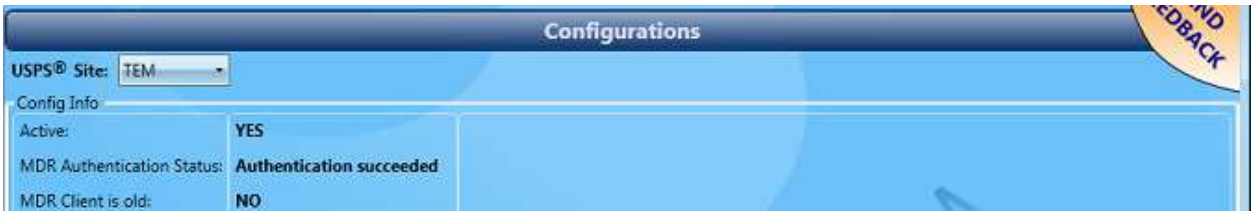


Read the information in the *Confirm* dialog carefully. Click the **OK** button to proceed with the verification or **Cancel** to abort the verification process.

The "Login failed" message will be replaced with a "Waiting for authentication" message.

While the "Waiting for authentication" message is displayed, users can continue to use PostalWeb Desktop Dashboard.

After a few moments, if the issue is P1 related, the "login failed" message displayed will be replaced with an "Authentication succeeded" message.



If the "Login failed" message is returned again, most likely the P1 login credentials being used are no longer valid. If this is the case, new/valid P1 login credentials will have to be entered for the MDR Client configuration from within PostalWeb Connector. For instructions, refer to the "PostalWeb Connector Installation & User Guide". The Guide is available via the Support Portal on Window Book's web site at: https://windowbook.na2.teamsupport.com/login/user. Registration and/or login is required.

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If the Client is also using PostalWeb and the same P1 login credentials were used to provision a location in PostalWeb Connector, the credentials will have to be updated/corrected in the PostalWeb Connector's 'PostalWeb' screen as well. For instructions, refer to the "PostalWeb Connector Installation & User Guide"; specifically, the 'Updating PostalOne! Credentials' section of the Guide.

- **Inactive** (files will not be moved or updated). An MDR Client configuration (i.e. USPS® Site) can be Inactive but is otherwise without error (i.e. is Valid). If this occurs, the Configurations panel will display that it is Inactive (i.e. Active = "NO") and allow the user to activate it directly from the Configurations panel by clicking the **Activate** button.

An MDR Client configuration (i.e. USPS® Site) can also be Inactive and require further attention in the MDR Client configuration setup in PostalWeb Connector to correct whatever is causing it to be Inactive.

If this occurs, the **Activate** button will not display in the Configurations panel. This means the user will have to access their PostalWeb Connector software located on the server (or computer in a single installation environment) to identify and correct the issue in order to be able to activate the USPS® Site.

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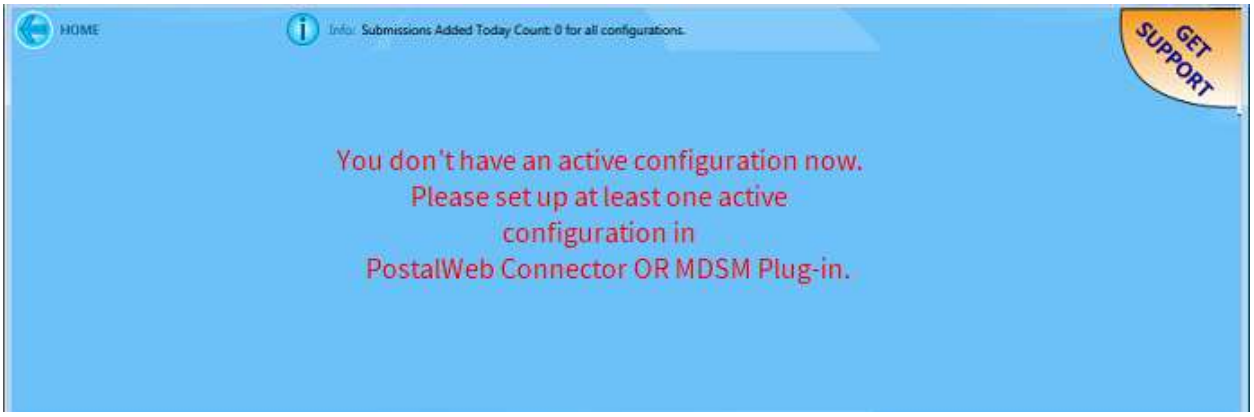
In the event a Client does not have at least one MDR Client configuration (i.e. USPS® Site) created, PostalWeb Desktop Dashboard will display the following screen.



When this screen is displayed, the user will not be able to access and display various panels in PostalWeb Desktop Dashboard, such as the Submissions panel or QuickFix.

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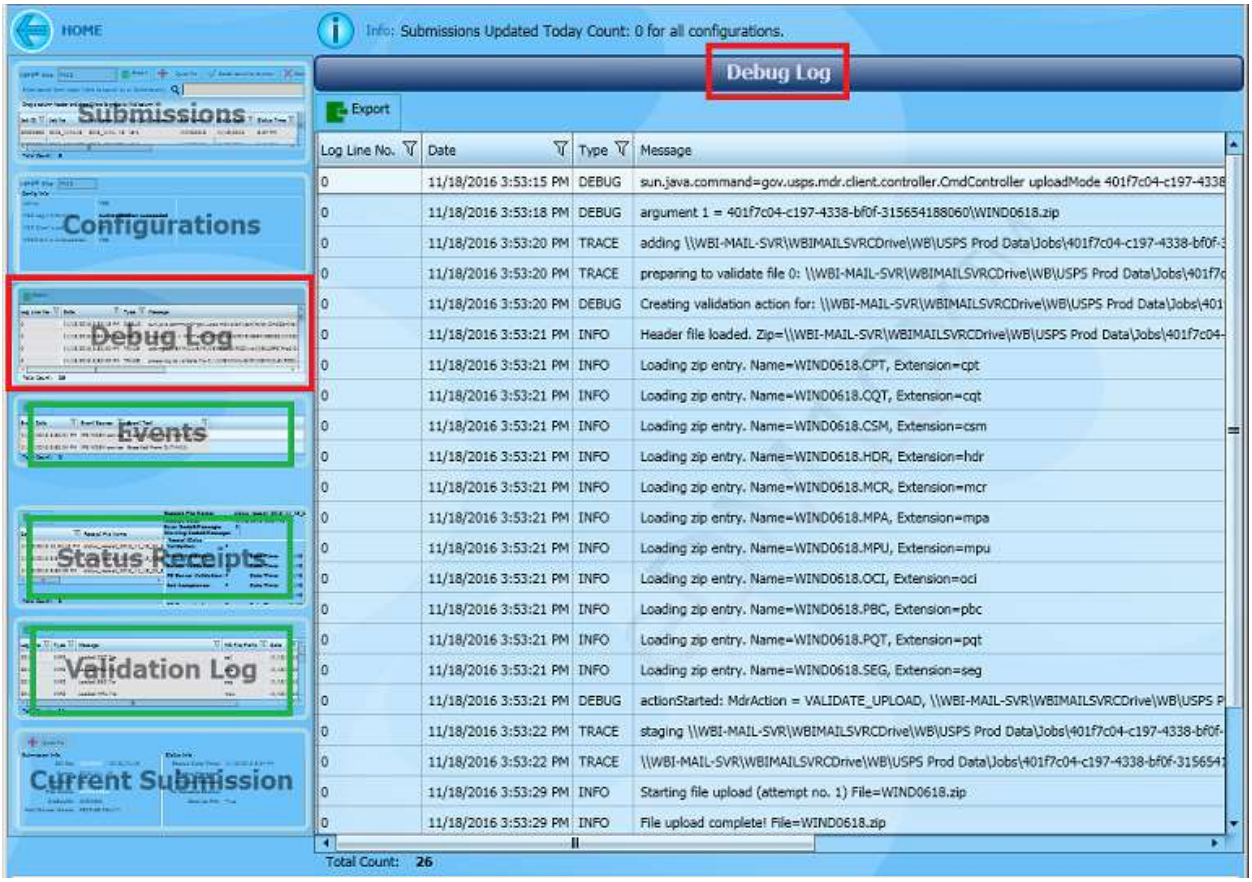
Debug Log, Events, Status Receipts, and Validation Log Panels

Clicking any of the aforementioned buttons will display a corresponding list of messages applicable to the specific job selected in the Submissions panel, which are generated by the PostalWeb Connector service and/or *PostalOne!* during the submission and validation process.

The panels contain columns capable of being filtered, sorted, grouped, as well as horizontally re-sized like the jobs list panel for ease-of-use (refer to Filtering, Sorting, and Grouping Data in this document for more information).



The user can go back to PostalWeb Desktop Dashboard's main or home screen at any time by clicking the back arrow located in the uppermost left corner of the page.

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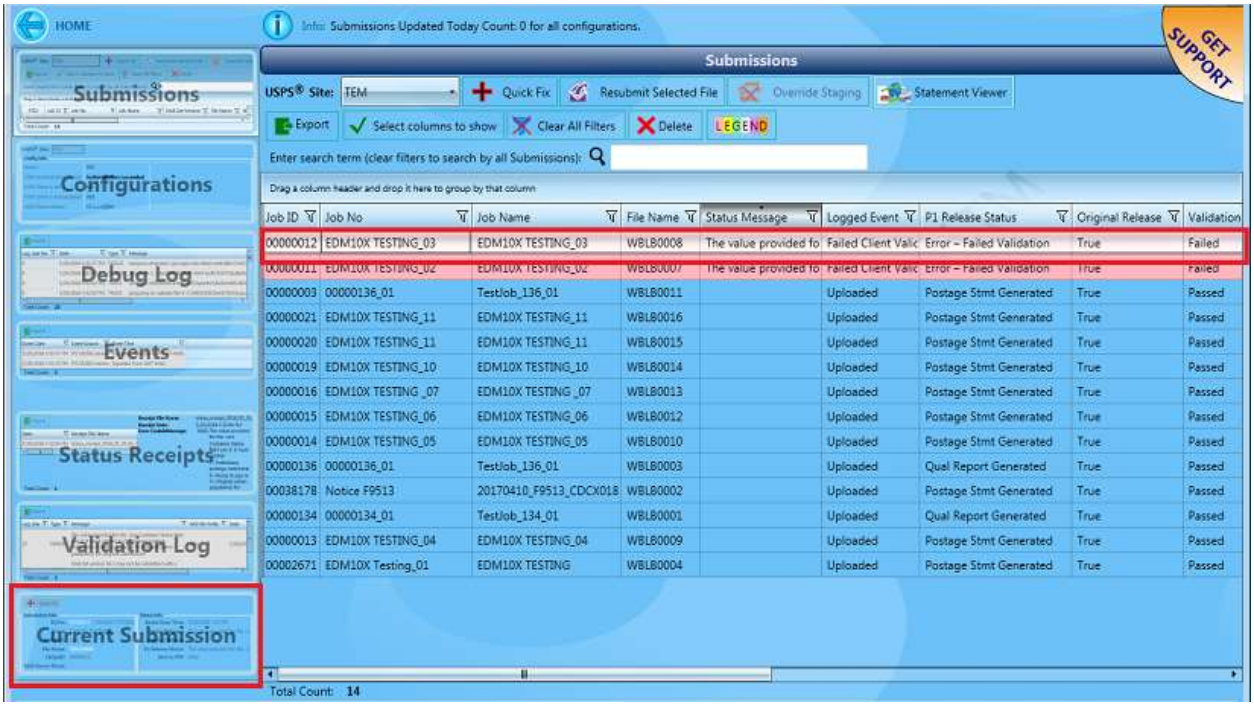
Current Submissions Panel

The details for a specific job can be displayed by selecting the job itself in the jobs list of the *Submissions* panel (single-click anywhere on the specific job line so that job line is highlighted) and click the **Current Submission** button.

The user can go back to PostalWeb Desktop Dashboard's main or home screen at any time by clicking the back arrow located in the uppermost left corner of the page.



The *Current Submission* panel will display. This panel displays the same information as the job lists panel for the specific job selected, but in text format (the data on the *Current Job Detail* screen cannot be edited).

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From this panel, the user can also access QuickFix for the job selected if the job has a Failed or Rejected status by clicking the **Quick Fix** button (the **QuickFix** button will be inactive or grayed out if the job has not been rejected or failed).

In addition, the record count for the PDR; PBC; CQT; and PQT files is provided, along with the percent of pieces that have been paid for, and the number of pieces that have been paid for. A graphical representation of the submission's payment status on PostalOne! will also display. The graphical representations are as follows:

- : Not paid (0%);
- : Almost paid (98% or greater, but less than 100%);
- : Partially paid (greater than 0, but less than 98%); and
- : Completely paid (100%).

The payment status that displays represents that payment status at the submission level, not the job level. If more than one submission exists for a job, the payment information provided is cumulative. For example, if there are three submissions for a single job, the 3rd submission's payment information displayed will reflect the sum total for it and the two prior submissions.

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Payment status is also available in DAT-MAIL; however, in DAT-MAIL, this information is provided at the job level only.

All payment/job status information is only reported for submissions to the PROD MDR Client.

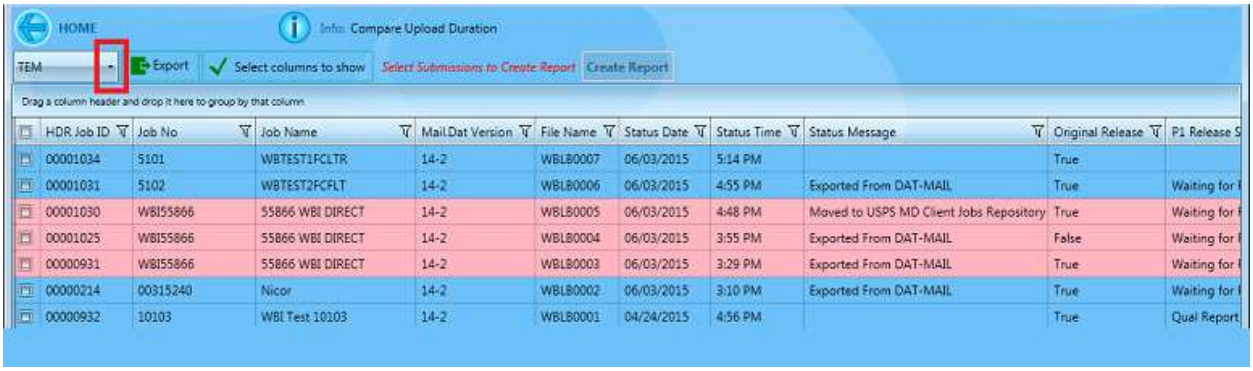
To be able to view the submission information, both PostalWeb Connector and a Client-provisioned PostalWeb site are required. No PostalWeb subscription sign-up is necessary.

REPORT BUTTON

Clicking the **Report** button displays the *Report* screen.

The user can go back to PostalWeb Desktop Dashboard's main or home screen at any time by clicking the back arrow ***located in the uppermost left corner of the page.***

The *Report* screen displays the list of jobs that have been submitted to *PostalOne!* for a selected MDR Client configuration. A list of available MDR Client configurations can be accessed by clicking on the down arrow next to the currently displayed configuration.



HDR Job ID	Job No	Job Name	Mail.Dat Version	File Name	Status Date	Status Time	Status Message	Original Release	P1 Release S
00001034	5101	WBTEST1FCLTR	14-2	WBLB0007	06/03/2015	5:14 PM		True	
00001031	5102	WBTEST2FCFLT	14-2	WBLB0006	06/03/2015	4:55 PM	Exported From DAT-MAIL	True	Waiting for
00001030	WBI55866	55866 WBI DIRECT	14-2	WBLB0005	06/03/2015	4:48 PM	Moved to USPS MD Client Jobs Repository	True	Waiting for
00001025	WBI55866	55866 WBI DIRECT	14-2	WBLB0004	06/03/2015	3:55 PM	Exported From DAT-MAIL	False	Waiting for
00000931	WBI55866	55866 WBI DIRECT	14-2	WBLB0003	06/03/2015	3:29 PM	Exported From DAT-MAIL	True	Waiting for
00000214	00315240	Nicor	14-2	WBLB0002	06/03/2015	3:10 PM	Exported From DAT-MAIL	True	Waiting for
00000932	10103	WBI Test 10103	14-2	WBLB0001	04/24/2015	4:56 PM		True	Qual Report

The jobs list is made up of various columns (i.e. Job ID, Job No., Job Name, etc.) that can be manipulated in various ways.

The columns that are displayed are controlled by the user via the **Select columns to show** button. When the **Select columns to show** button is clicked, a list of the columns that make up the jobs list are displayed.

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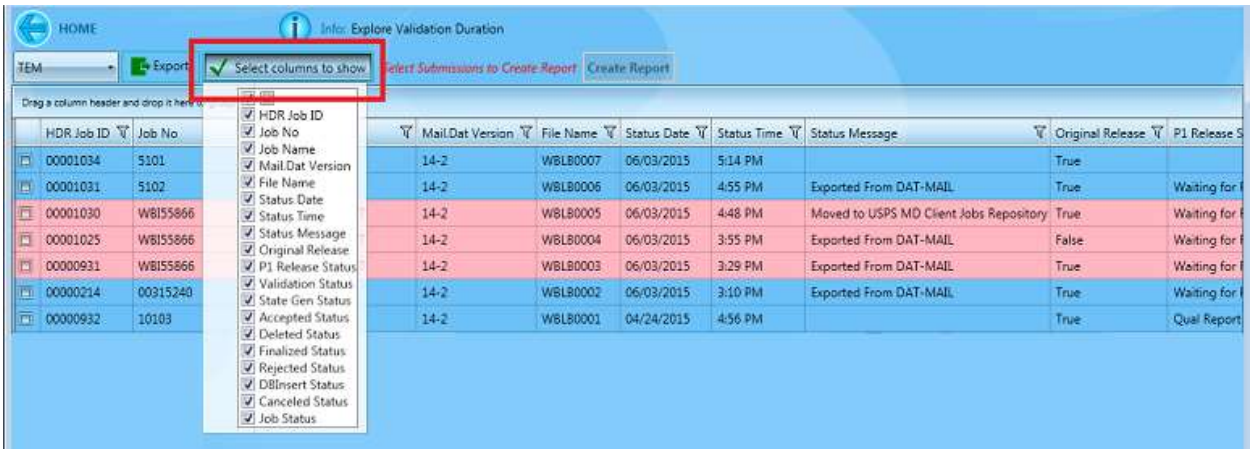
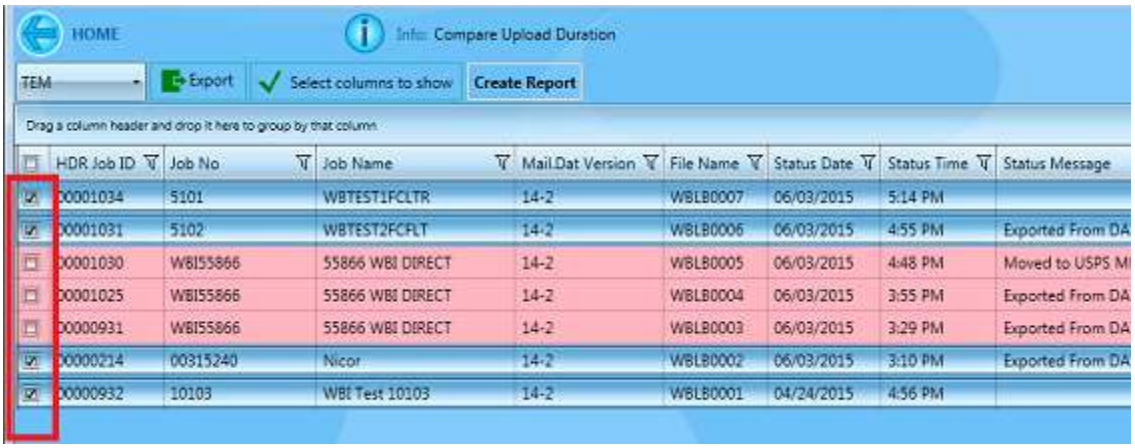
To display a column, select (check) the corresponding box (in the example below, all the columns are selected (checked); therefore, all the columns will be displayed in the jobs list). To hide a column, de-select or un-check the corresponding box.



Each column of data contained in the jobs list is capable of being filtered, sorted, grouped, as well as horizontally re-sized for ease-of-use (refer to Filtering, Sorting, and Grouping Data under the section describing the Submissions panel in this document for more information).

Report data is generated for the selected jobs. Jobs can be selected individually by clicking the check-box located to the left of the individual job line…



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…or all the jobs can be selected at once by clicking the check-box located in the column header.

All the job or submission data displayed in the jobs list can be exported outside of PostalWeb Desktop Dashboard in one of three file formats: Excel, Word, and Comma Separated Value (CSV).

To export the data:

- Click the **Export** button and select the preferred file format;

- A *Save As* dialog will display. Select the location where the file should be saved to and enter a file name; and
- Click the **Save** button to save the data or click the **Cancel** button to cancel the export process.

All the displayed job data is exported using the Export function. Exported data cannot be limited to only selected jobs.

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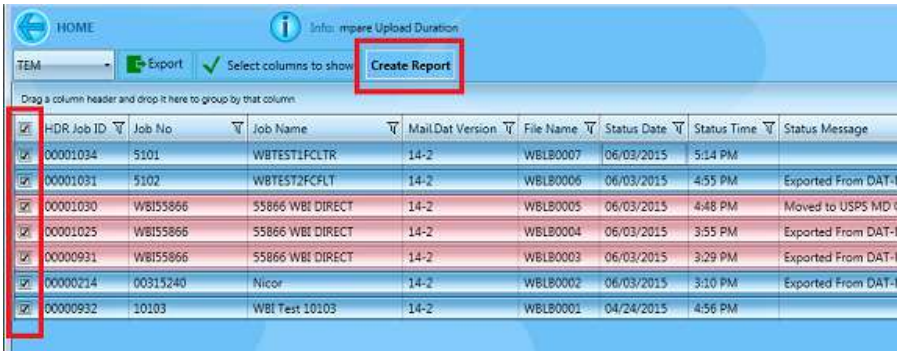
The **Create Report** button becomes enabled once a job(s) selection is made.



Clicking the **Create Report** button displays the report data for the jobs selected:

- HDR Job ID (Corresponds with the 'Header Job ID' field displayed on the main *Reports* screen);
- Process Start & Process End (date/time stamps);
- Process Duration (time stamp);
- Validation Start & Validation End (date/time stamps);
- Validation Duration (time stamp);
- Upload Start & End (date/time stamps);
- Upload Duration (time stamps);
- Attempt Start & End (date/time stamps); and
- Attempt Duration (time stamp).

The various Duration data is also displayed in a graph at the bottom of the screen.

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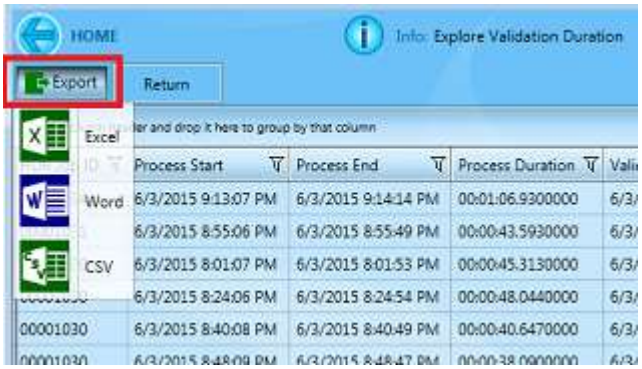
The displayed report data can be exported outside of PostalWeb Desktop Dashboard in one of three file formats: Excel, Word, and Comma Separated Value (CSV).

To export the data:

- Click the **Export** button and select the preferred file format;



- A *Save As* dialog will display. Select the location where the file should be saved to and enter a file name; and
- Click the **Save** button to save the data or click the **Cancel** button to cancel the export process.

To go back to or display the main *Report* screen, click the **Return** button. Clear the job selection by un-checking the selected jobs.

QUICKFIX BUTTON

From PostalWeb Desktop Dashboard's main or home screen, clicking the **QuickFix** button displays the PostalWeb Desktop Dashboard *QuickFix* page.

The QuickFix button will not be visible for those users whose login information has been assigned a role of 'User' within PostalWeb Connector, specifically the Role Security screen. This applies to all PostalWeb Desktop Dashboard screens or panels where the QuickFix button normally resides (refer to the "PostalWeb Connector Installation & User Guide" for more information. The Guide is available via the Support Portal on Window Book's web site at: https://windowbook.na2.teamsupport.com/login/user. Registration and/or login is required.

The user can go back to PostalWeb Desktop Dashboard's main or home screen at any time by clicking the back arrow located in the uppermost left corner of the page.

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Failed Submissions, Rejected Submissions, submissions in Pre-Staging, and existing Configurations can all be accessed and viewed from the QuickFix home page by clicking the corresponding button located to the left. In the screen image below, the **Failed** button is selected; therefore, the 'Failed Submissions' panel is displayed.

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Failed Submissions Panel

Submissions or jobs that fail validation are displayed in the *Failed Submissions* panel. This panel is displayed when the **Failed Submission**s button is clicked (see image below).

These failed jobs are displayed according to the MDR Client configuration that was used for their processing (1). Select the appropriate configuration (in the example above, 'TEM' is selected).

The files or submissions that failed are listed vertically in the 'Failed Submissions List' section of the *Failed Submissions* panel (2). In the image above, there are three submission listed. Clicking the **QuickFix** button located adjacent to the failed submission will direct the user to the QuickFix function for that file. To view a submission's details, single click on it to select it.

'Selected Submission Info' section of the panel displays the selected submission's identification details (3), such as Job ID/No, Name, File Name, and the Mail.dat version of the submission.

Details of the status information can be found in the 'Status Info' panel (4).

The values of the various status types are displayed in the 'Statuses' panel (5).

The user can select a failed submission and re-submit it to *PostalOne!* from the *Failed Submissions* page by selecting the submission and clicking the **Resubmit Selected File** button (6). If the submission is re-submitted, it will be removed from the list of failed submissions and no longer display on the *Failed Submissions* page.

Any validation logs that have been generated for the failed submission are listed below in the 'Validation Logs for Selected Submission' section (7). The validation log(s) provide error information pertaining to the reason for failure; as well as, the file and field number that the bad or value(s) resides in. The

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columns of data provided can be filtered, sorted, or grouped, as well as horizontally re-sized for ease-of-use (refer to Filtering, Sorting, and Grouping Data in this document for more information).

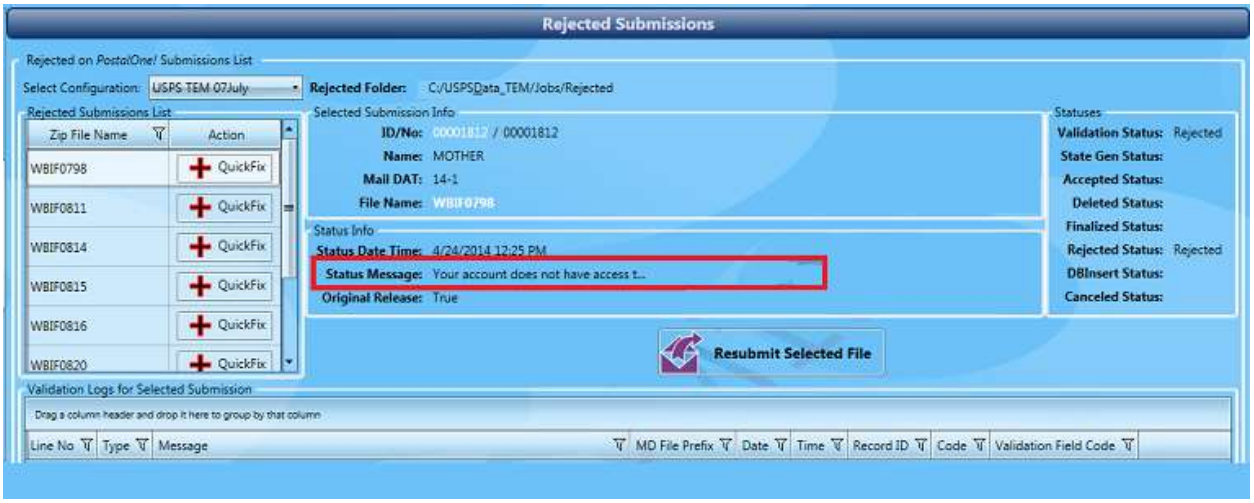
In the image above, the validation log pertaining to the failed submission is reporting an error in the CSM file, specifically field 1124. This information is reported in the 'Validation Field Code' field located in the validation log table – far right.

Clicking the **QuickFix** button located to the right of a specific file name 2 displays the screen containing the individual file segments of that failed file. In this screen, the user can determine, based on the display, whether each file contains errors or issues that caused the file to fail. The same validation logs provided in the *Failed Submissions* page are also displayed identifying said errors or issues (where applicable). For instructions on how to use the QuickFix feature, refer to the USING QUICKFIX section of this Guide.

Rejected Submissions Panel

Submissions or jobs that are rejected are viewable when the **Rejected Submissions** button is clicked.

The *Rejected Submission* panel functions in the same manner as the *Failed Submissions* panel. The difference between the two (i.e. Failed vs. Rejected files), is that validation logs containing the actual errors and locations of those errors in the Mail.dat file that caused the rejection are not provided for rejected files. A basic status message; however, is displayed for a rejected file in the 'Status Info' portion of the *Rejected Submission* panel to assist the user.



One of the most common issues that would cause a file or submission to be rejected is when the eDocs or Submitting CRID information is incorrect. This issue returns the Status Message of "Your account does not have access t…" as seen in the screen image above. This issue can be corrected, and the file(s) be resubmitted using QuickFix.

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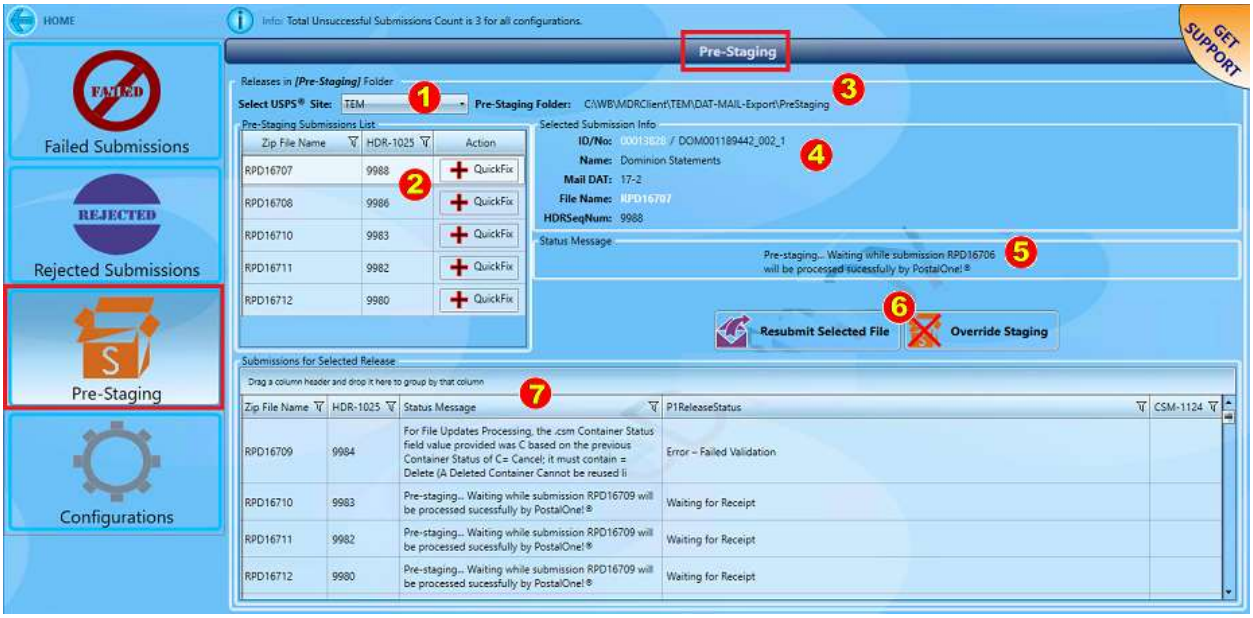
Pre-Staging Panel

Submissions or jobs that are in pre-staging are displayed in the *Pre-Staging* panel. This panel is displayed when the **Pre-Staging** button is clicked (see image below).



These pre-staged jobs are displayed according to the MDR Client configuration that was used for their processing 1. Select the appropriate configuration (in the example above, 'TEM' is selected).

The files or submissions that are in pre-staging are listed vertically in the 'Pre-Staging Submissions List' section of the *Pre-Staging* panel 2. In the image above, there are five submissions listed. To view a submission's details, single click on it to select it. Clicking the **QuickFix** button located adjacent to a submission in pre-staging (if applicable) will direct the user to the QuickFix function for that file.

The location of the 'pre-staging' folder on the server where the files are kept is provided 3.

The 'Selected Submission Info' section of the panel 4 displays the selected submission's identification details, such as Job ID/No, Name, File Name, the Mail.dat version of the submission, and the submission's header sequence number.

A message providing the File Name of the submission the selected file is waiting for is provided in the 'Status Message' panel 5. Once the submission named in the Status Message panel successfully uploads to P1, the selected job in pre-staging will be uploaded and will no longer display in the *Pre-staging* panel.

The user can select a submission in pre-staging and re-submit it to P1 by selecting the submission and clicking the **Resubmit Selected File** button 6. Once this is done the submission will no longer display in the *Pre-staging* panel.

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A user can also select a submission in pre-staging and override the staging logic to forcibly upload it to P1 by selecting the submission and clicking the **Override Staging** button 6. Once this is done the submission will no longer display in the *Pre-staging* panel.

It is very important to read and fully understand the information provided in Staging Logic and Override Staging Button before using the OVERRIDE STAGING button located in the 'Pre-Staging' panel! Failure to do so could cause unexpected results!

The 'Submissions for Selected Release' area of the Pre-Staging panel 7 displays the File Name, Historical Header Sequence Number, the Current Status of the file (i.e. PostalWeb Desktop Dashboard status), and the P1 Status Message for all of the files or submissions listed in the *Pre-Staging* panel, which helps the user determine why the submission is in pre-staging and identify errors (if any) that associated with the file/submission.

Configurations Panel

Available MDR Client configurations created within PostalWeb Connector are viewable when the **Configurations** button is clicked (see image at the start of this section under QUICKFIX BUTTON). For more information about the Configurations panel, refer to Configurations Panel located under the "Submissions Button" section in this document.

JOBS ROUTING BUTTON

The **Jobs Routing** button will only display if the 'Tracking/Postage Service Providers' feature is enabled in PostalWeb Connector.

This feature is designed to allow the Mailer to set up a transfer folder to one or more tracking service providers and use data in the Mail.dat file to route the file to the correct provider. Only after the Mail.dat file has successfully been submitted to *PostalOne!* and its postage statements have been finalized will the files be placed into the appropriate folder for transfer. This feature is designed to provide a real-time feed of successful submissions.

The Tracking/Postage Service Providers feature is fully functional on Window Book's side; however, the service providers are not yet equipped to handle the Mail.dat file in its present form; therefore, this feature should not be enabled at this time (December 2016).

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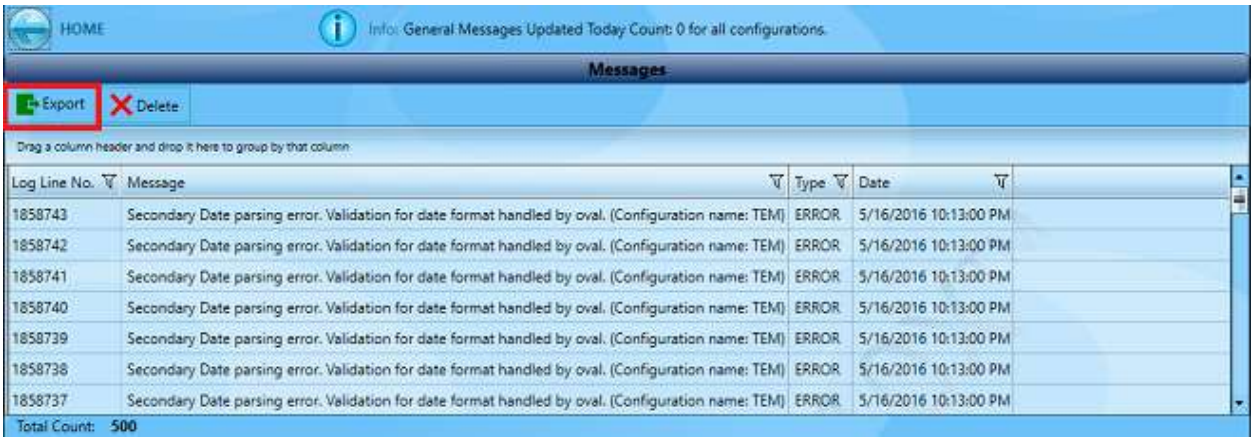
MESSAGES BUTTON

PostalWeb Connector reports general messages relating to file transfer activity when jobs are submitted to *PostalOne!* These general messages are viewable in PostalWeb Desktop Dashboard by clicking on the **Messages** button located on PostalWeb Desktop Dashboard's main or home screen.

The user can go back to PostalWeb Desktop Dashboard's main or home screen at any time by clicking the back arrow located in the uppermost left corner of the page.



The columns displayed on the Messages screen are static and cannot be added to or removed; however, the data reported can be filtered, sorted, and grouped just like the jobs list (refer to Filtering, Sorting and Grouping Data above), as well as horizontally re-sized (refer to Submissions Panel above) for easier viewing.

The message information displayed in the Messages screen can also be exported by clicking the **Export** button located at the top left of the message list (see image above). The message information can be exported in one of three formats: Excel, Word, or Comma Separated Values (CSV).

- Select the file format from the drop-down menu;
- A *Windows Explorer* dialog will display. Select the location where the exported file should be saved to, and name the export file; and
- Click the **Save** button to save the data or click the **Cancel** button to cancel the export process.

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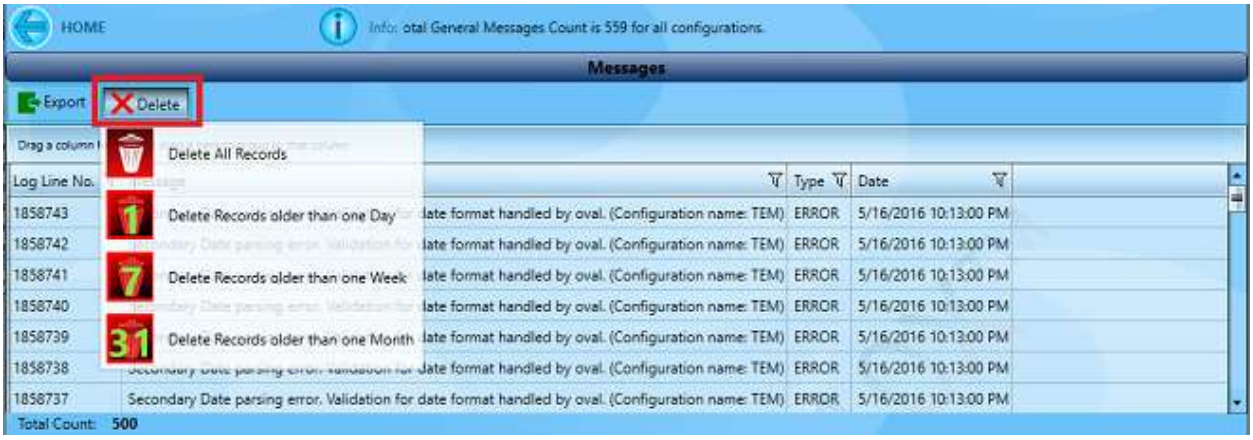
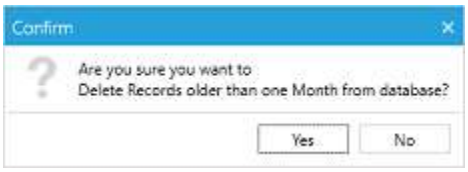
Messages can also be deleted or removed from the system to assist with usability and disk space management. To delete messages, click the **Delete** button. There are four delete options:

- Delete All Records;
- Delete Records Older Than One Day;
- Delete Records Older Than One Week; and
- Delete Records Older Than One Month.



When a delete option is selected, a *Confirm* dialog will display, corresponding to the delete option chosen. Click the **Yes** button to continue with the delete process or click the **No** button to cancel the delete process.



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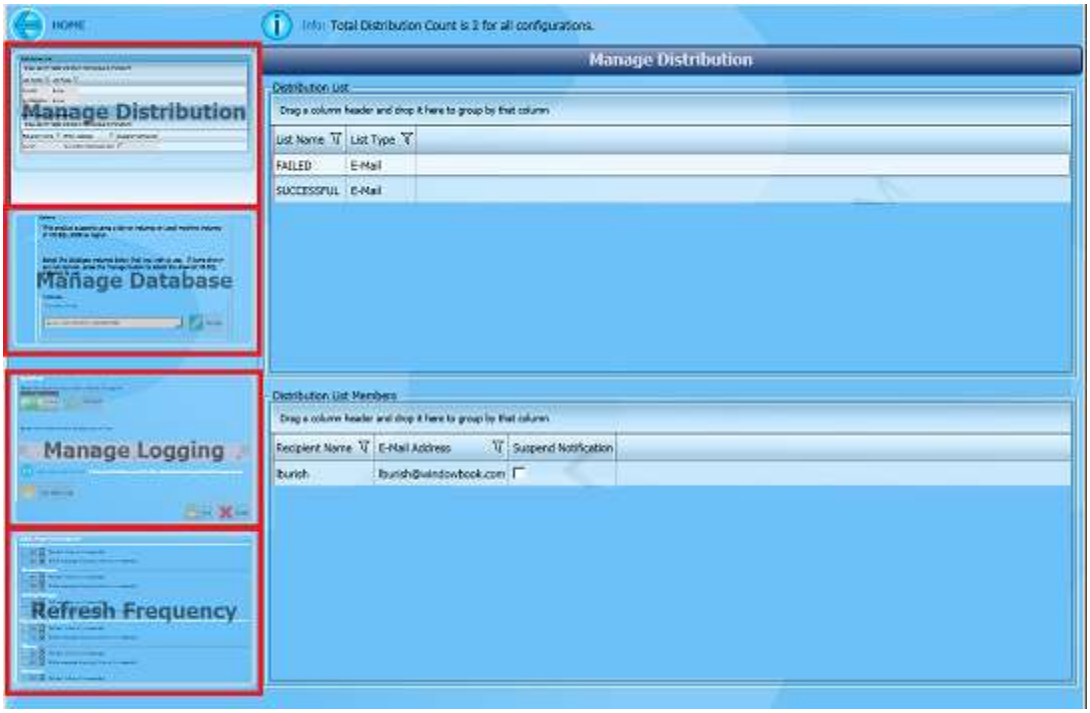
PREFERENCES BUTTON

From PostalWeb Desktop Dashboard's main or home screen, clicking the **Preferences** button displays the PostalWeb Desktop Dashboard *Preferences* page. There are four button options on the *Preferences* page: Manage Distribution; Manage Database; Manage Logging; and Refresh Frequency.

The user can go back to PostalWeb Desktop Dashboard's main or home screen at any time by clicking the back arrow located in the uppermost left corner of the page.



Manage Distribution

Clicking the **Manage Distribution** button displays the Manage Distribution panel. This is the default panel that displays when the **Preferences** button on PostalWeb Desktop Dashboard's home or main screen is clicked.

The Manage Distribution panel displays distribution lists (along with each lists' member(s)), that were created in PostalWeb Connector.

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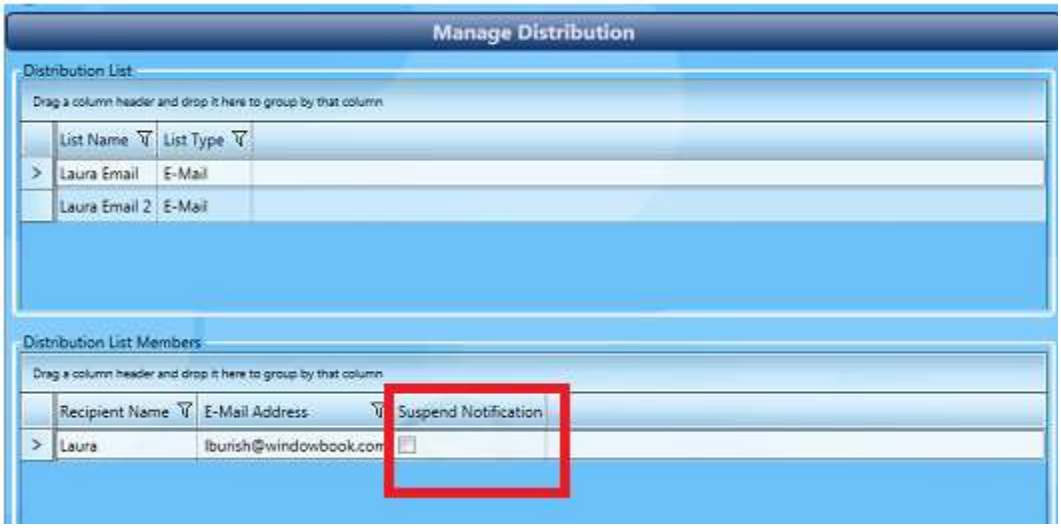
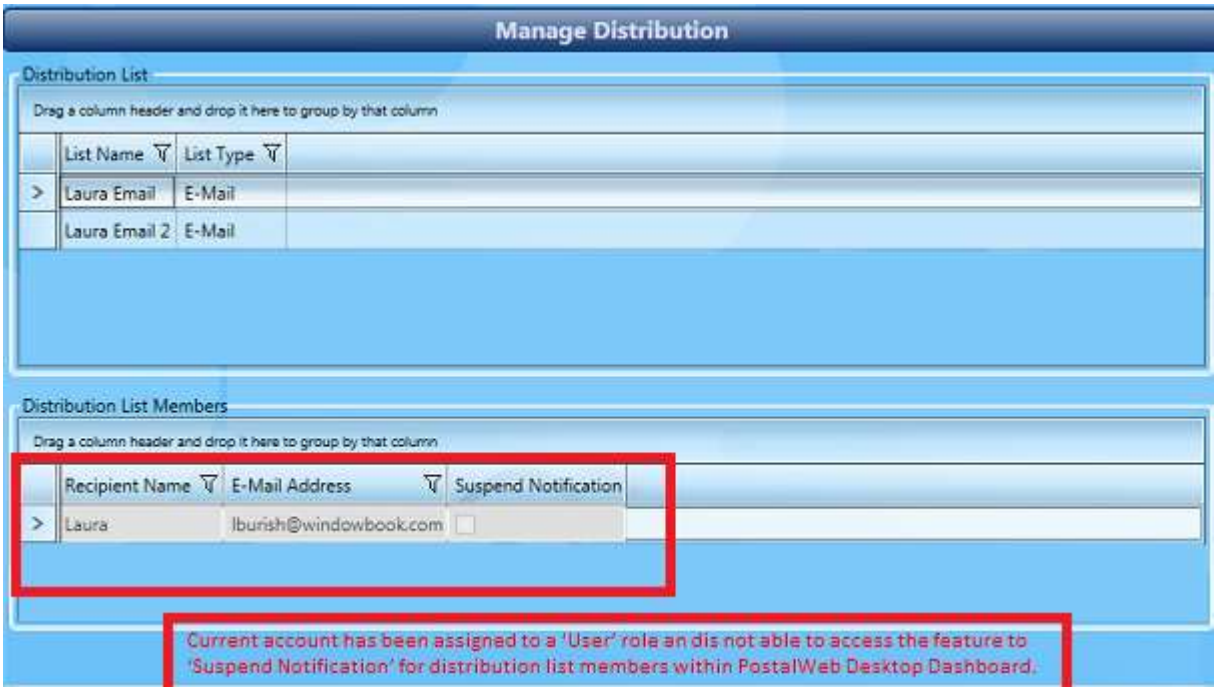
From this panel, the user has the ability to 'suspend notification' of emails to individual list members by selecting (checking) the 'Suspend Notification' box located to the right of the list member's name and email address. This option is useful in the event list member is on vacation or works a different shift.



If a Client is using the 'Role Security' feature provided in PostalWeb Connector, only those users assigned a role of 'Power User' or 'Admin' can 'Suspend Notification' for a distribution list member(s). The Manage Distribution panel will appear as follows, with the list members displayed, but greyed out for those logins assigned a role of 'User'.



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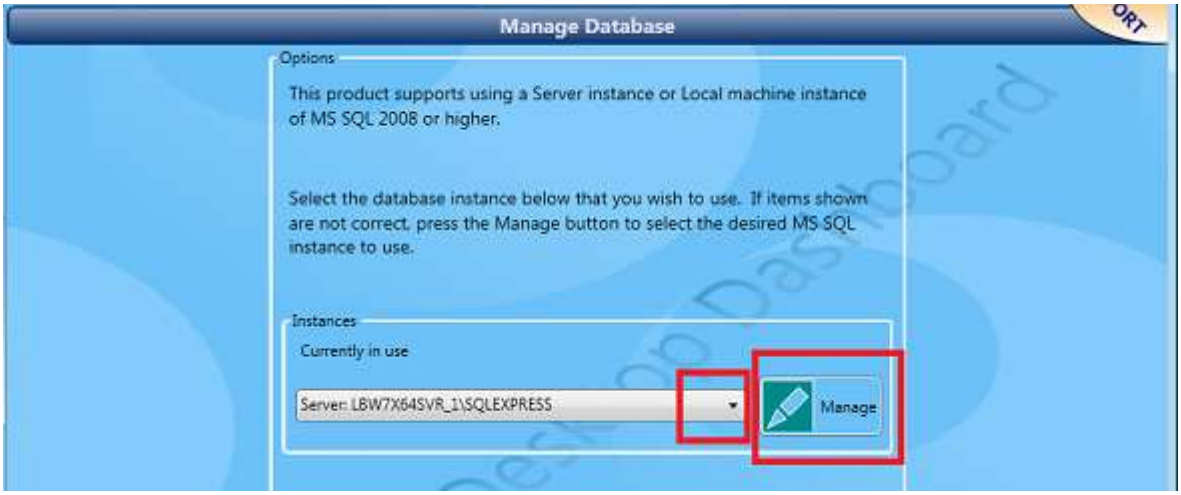
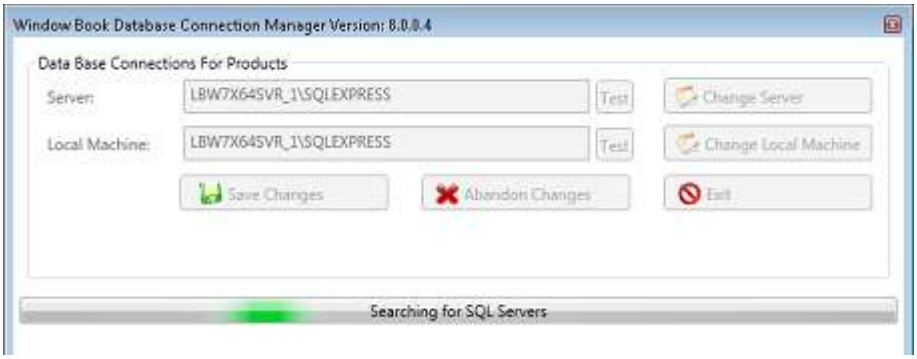
Manage Database

Clicking the **Manage Database** button displays the Manage Database panel. The Client can select the database instance to use by clicking on the drop-down arrow and selecting the instance from the list.



If the instance is not listed, the Client can click the **Manage** button. The *Window Book Database Connection Manager* will display. From the Connection Manager, the Client can search for the preferred database instance.



Window Book strongly recommends that only qualified Window Book personnel or technical people with DAT-MAIL and/or PostalWeb Desktop Dashboard and SQL knowledge pertinent to the version of SQL Express being used should use the 'Manage Database' feature. Contact a Window Book Technical Support Representative for more information (refer to the CONTACT INFORMATION section in this document).

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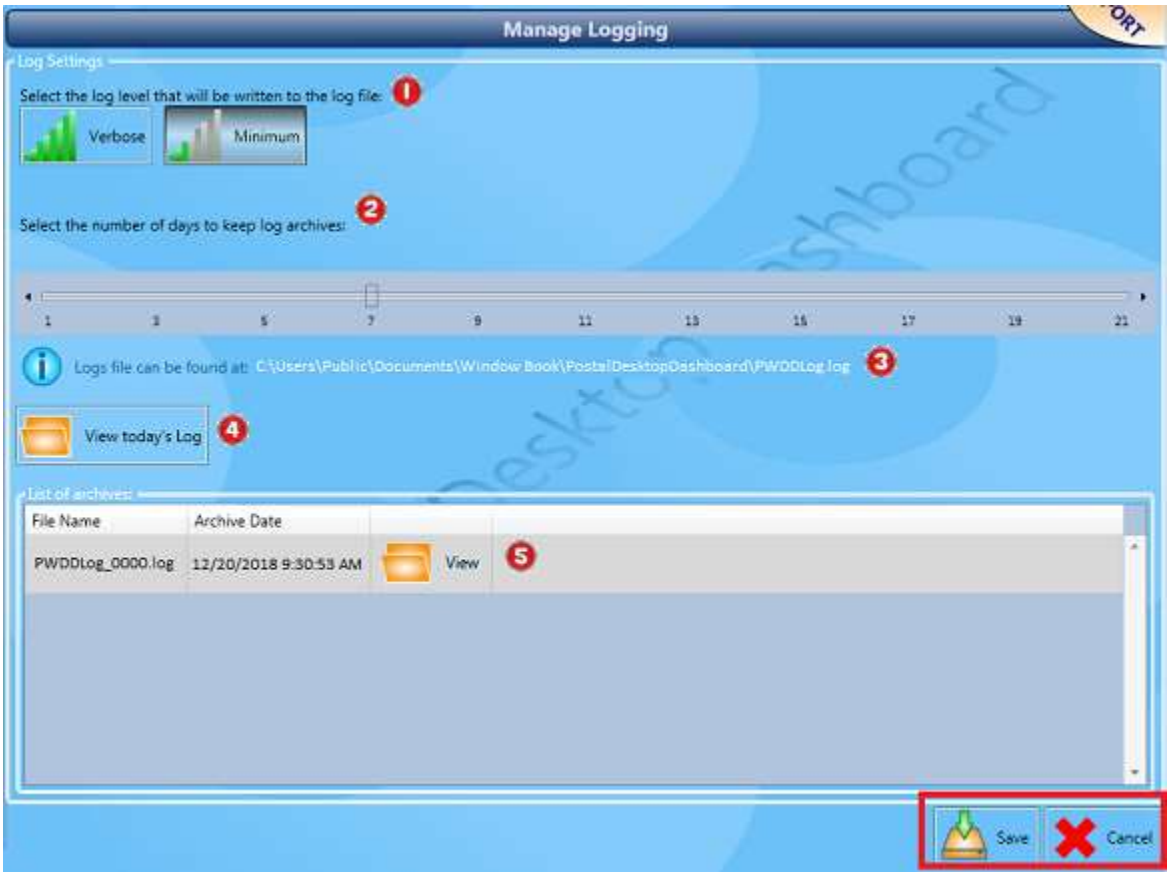
Manage Logging

Clicking the **Manage Logging** button displays the Manage Logging panel.



This panel allows the Client to manage the log files that are generated when using PostalWeb Desktop Dashboard:

- The log level can be set to 'Verbose' or 'Minimum' (recommended default) ❶;
- The number of days to keep the log archives can be set/adjusted ❷ (move the slider right or left);
- The location of the log files generated is provided ❸;
- That day's log file can be viewed by clicking the **View Today's Log** button ❹; and
- A log file archive can be viewed by clicking the **View** button next to the specific archive ❺ (archives are listed by File Name and then Archive Date - each can be sorted in ascending or descending order by clicking the column header).

If adjustments are made to the existing settings, click the **Save** button when finished. To not save changes, click the **CANCEL** button.

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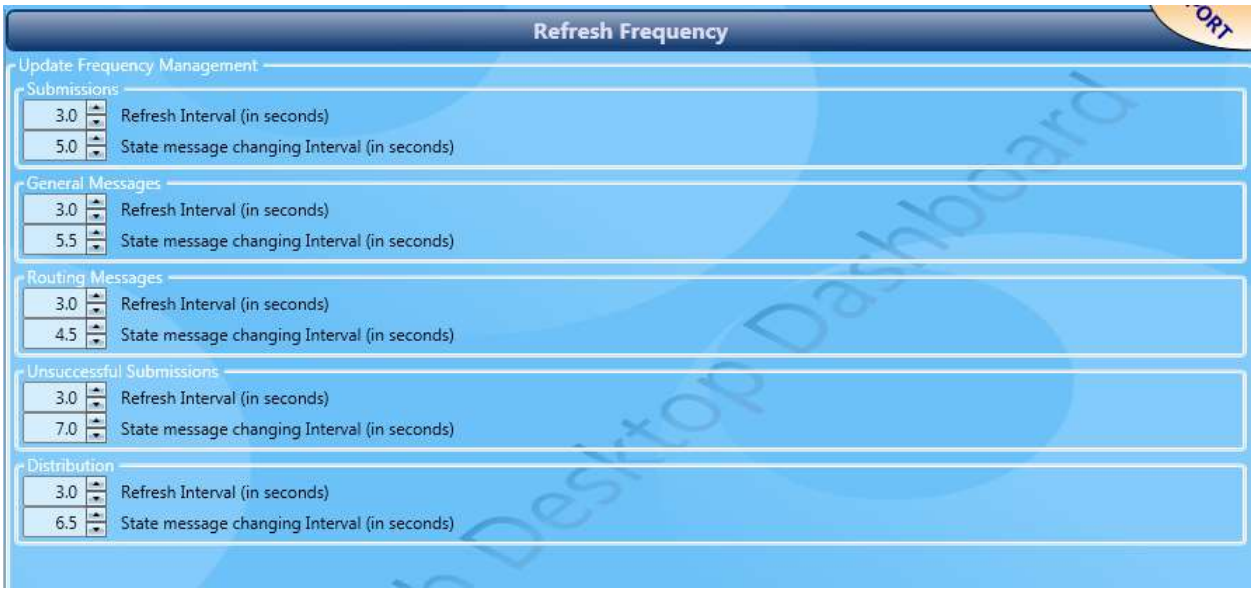
Refresh Frequency

Clicking the **Refresh Frequency** button displays the Refresh Frequency panel.



This panel allows for the management of the refresh rate for displaying the results of the following functions: Submissions; General Messages; Routing Messages; Unsuccessful Submissions (QuickFix screen, i.e. Failed and Rejected submissions); Staging; and Distribution (e-mail notifications). When a refresh is requested, the UI or user interface will be updated with any database changes that were not yet displayed.

In addition, the how often the state messages display for each of the same processes mentioned above can also be managed. State messages display as scrolling marquees on the buttons located on PostalWeb Desktop Dashboard's main or home screen; as well as at the top of each button's corresponding page or panel (refer to the write-up under the Component Identification section in this Guide for more information). Adjusting the refresh frequency of a function's state message will change how often the scrolling marquee displays.

Window Book strongly recommends that the refresh settings found on the 'Refresh Frequency' panel be left at their default values. Only a qualified Window Book Support representative should ever make changes to the "refresh intervals" or "state message changing" displayed on this screen!

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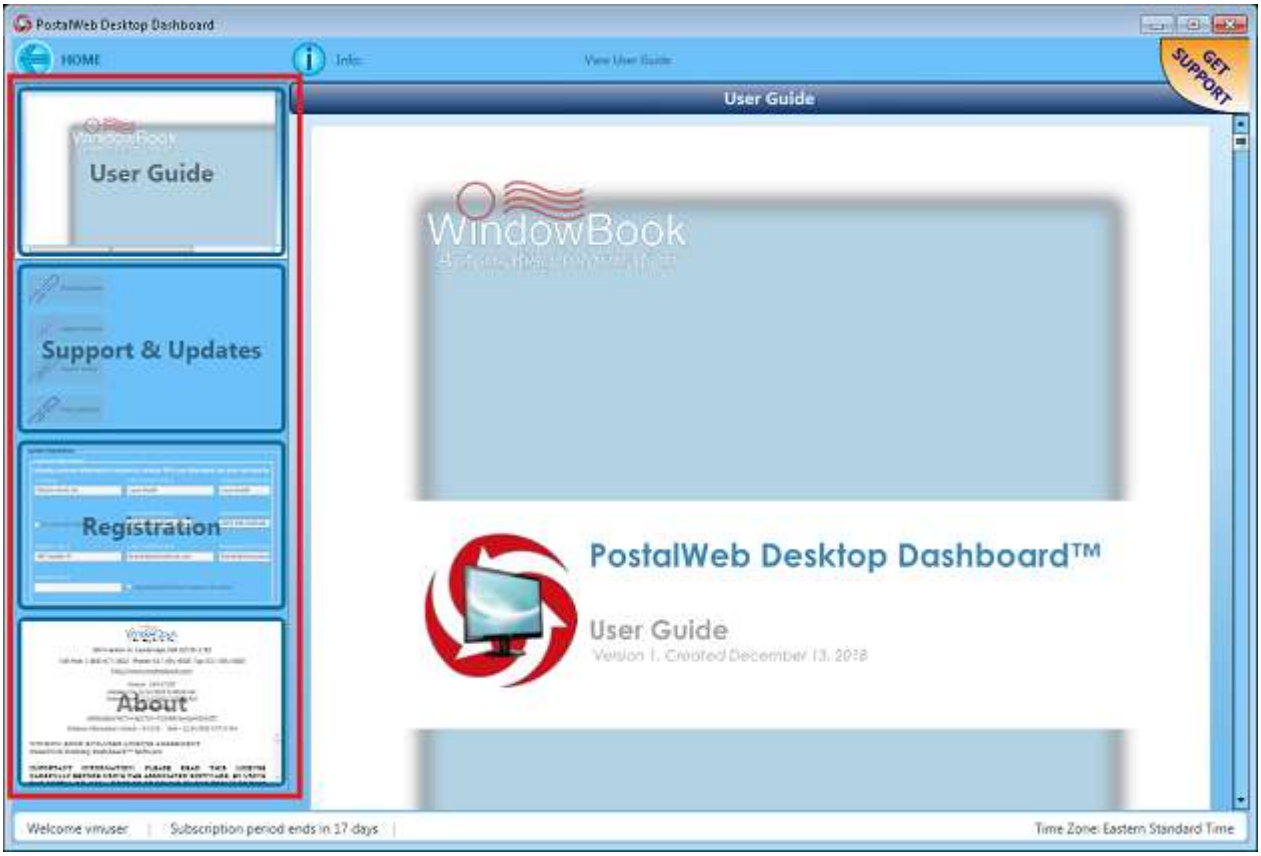
HELP BUTTON

From PostalWeb Desktop Dashboard's main or home screen, clicking the **Help** button displays the PostalWeb Desktop Dashboard *Help* page.

The user can go back to PostalWeb Desktop Dashboard's main or home screen at any time by clicking the back arrow located in the uppermost left corner of the page.

From the Help page the following options (buttons) are available: 'User Guide…'; 'Support & Updates'; 'Registration'; and 'About'.



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User Guide

Clicking **User Guide…** button displays the currently published "PostalWeb Desktop Dashboard User Guide". This document provides use instructions for the PostalWeb Desktop Dashboard software.

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Support & Updates

Clicking the **Support & Updates** button displays the *Support & Updates* panel. From this panel, the user has three button options: Check for Updates; Support Questions; Support Session; and Make Suggestion.

CHECK FOR UPDATES

Clicking the **Check for Updates** button launches an Internet browser and displays the Downloads page from Window Book's web site. From the Downloads page the user can check to see if there are newer versions of PostalWeb Connector and PostalWeb Desktop Dashboard available for downloading.

It is important to remember that if you are preparing to update your existing version of PostalWeb Desktop Dashboard, you must also update PostalWeb Connector, as well. PostalWeb Connector should be updated before PostalWeb Desktop Dashboard. Instructions for updating your PostalWeb Desktop Dashboard software along with PostalWeb Connector are provided in the "PostalWeb Desktop Dashboard Installation & Update Guide", which can be viewed or downloaded via the Support Portal on Window Book web site's at https://windowbook.na2.teamsupport.com/login/user. Registration and/or login is required.

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To receive email notifications automatically when Window Book releases a new version of a particular software program, sign-up for Window Book's 'Software Notices' on the Window Book web site (Software Update Notices). Registration and/or login is required.

SUPPORT QUESTIONS

Clicking the **Support Questions** button launches an Internet browser and displays the log-in page for the Window Book Support Portal on Window Book's web site. Within the Support Portal the user will have access to FAQs, Window Book's Knowledge Base, and many other support-related links to increase product knowledge and ease-of-use. Registration and/or login is required.

SUPPORT SESSION

Clicking the **Support Session** button launches an Internet browser and displays the Schedule Session page from Window Book's web site. From the Schedule Session page, the user can contact Window Book's Technical Support team to schedule a live, technical support session.

MAKE SUGGESTION

Clicking the **Make Suggestion** button launches an Internet browser and displays the Window Book Suggestion Box page from Window Book's web site. From the Suggestion Box page, the user can submit their suggestions (product, support, documentation, etc.) direct to Window Book. Your privacy is guaranteed!

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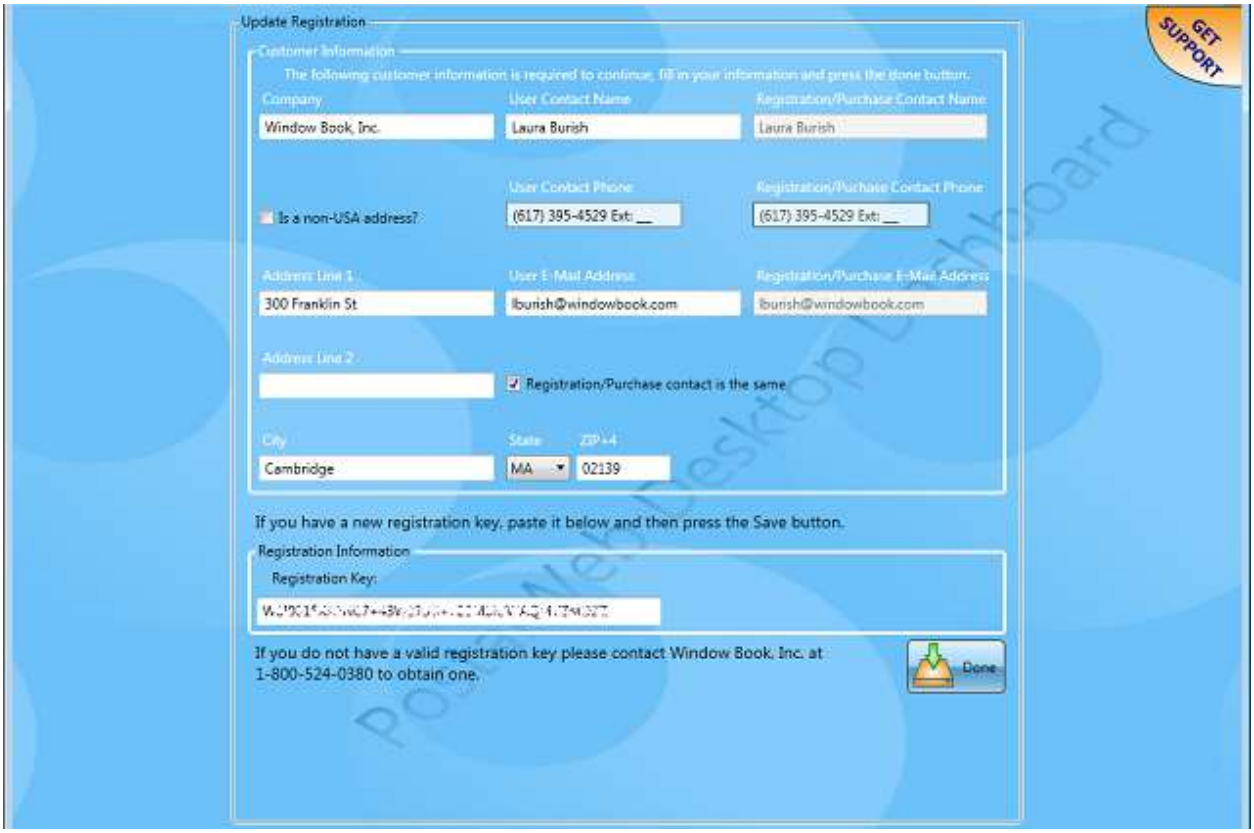
Registration

Clicking the **Registration** button displays the *Registration* panel for that computer's PostalWeb Desktop Dashboard's installation.



The Registration Key only displays when PostalWeb Desktop Dashboard is opened independently from DAT-MAIL. If a Client is using DAT-MAIL and launches PostalWeb Desktop Dashboard from within DAT-MAIL (launched by clicking the blue icon in DAT-MAIL), the 'Registration Key' field will be blank.

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About

Clicking the **About** button displays the *About* panel. This panel provides contact information for Window Book, product version information, registration key information, and the End User License Agreement for the PostalWeb Desktop Dashboard software.

POSTALWEB® ADVANCED BUTTON

The PostalWeb® Advanced button is only displayed on the PostalWeb Desktop Dashboard main or home screen if the Client has a company-specific PostalWeb site with a mailing location provisioned in PostalWeb Connector.

For convenience purposes, users can request that FIN (finalized) postage statements or UPD documents for a particular job(s) be re-sent to their PostalWeb site. Simply click on the **PostalWeb® Advanced** button on PostalWeb Desktop Dashboard's main or home screen. The *FIN Submissions* panel displays by default. To re-send UPD documents, click the **UPD Submissions** button located on the left. The *UPD Submissions* panel functions in exactly the same manner as the *FIN Submissions* panel.

The user can go back to PostalWeb Desktop Dashboard's main or home screen at any time by clicking the back arrow located in the uppermost left corner of the page.

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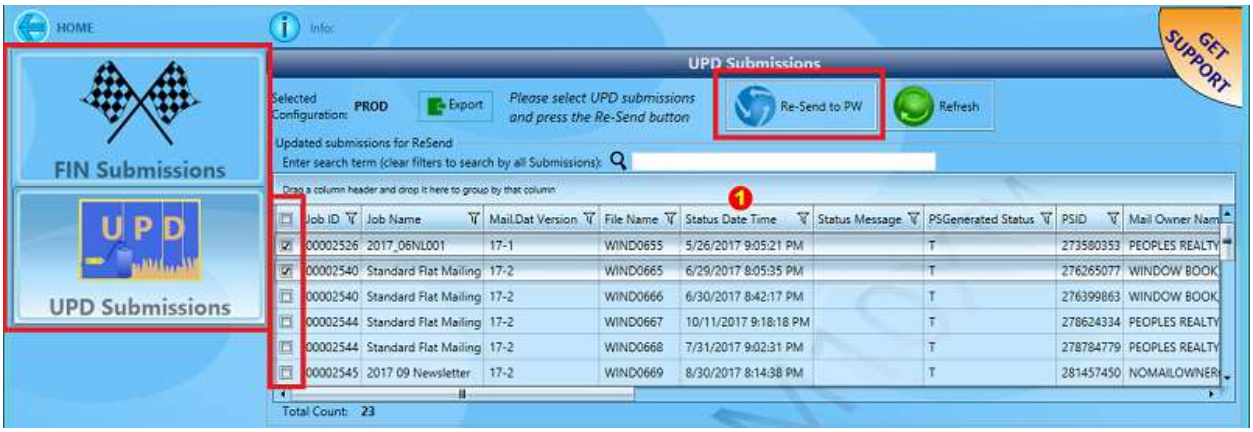
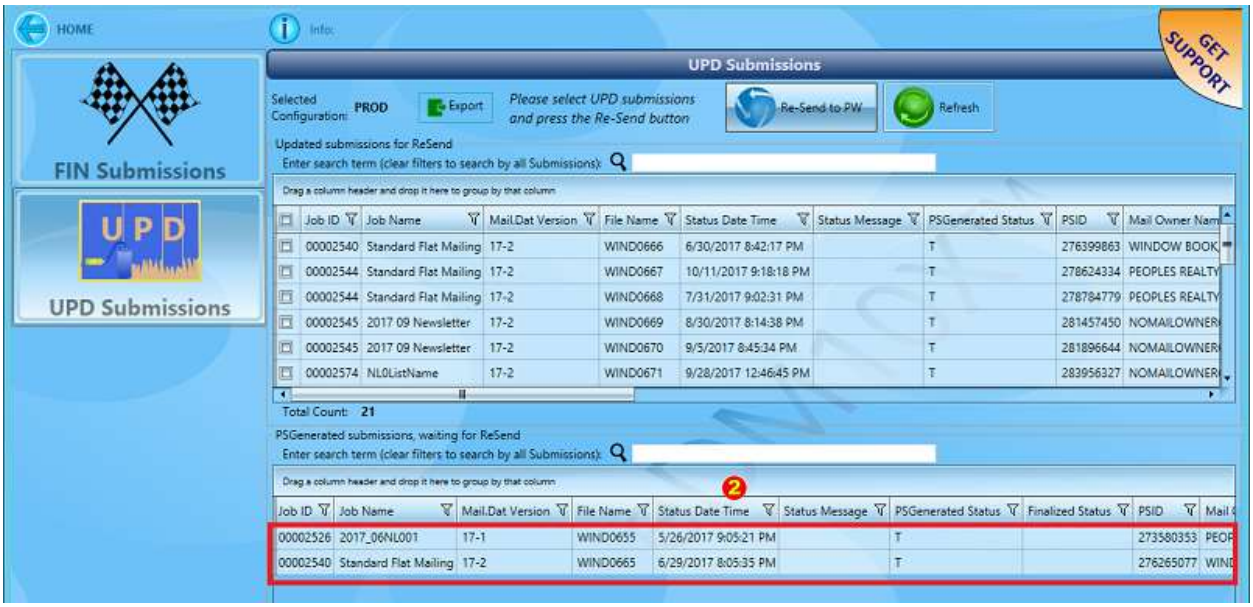
All job-specific submission information that is or will be available on a Client's PostalWeb site will be displayed in the panel's top grid 1 (in the example being used here, the *FIN Submissions* panel is being used). The user can select the job(s) that they would like to have the FIN statements re-sent for by selecting (checking) the box to the left of the 'Job ID' field. Once the job(s) is selected, the user would then click the **Re-Send to PW** button.



When the **Re-Send to PW** button is clicked, the job line(s) will move from the top grid to the bottom grid 2, so that the user has a clear picture of what was re-sent to PostalWeb.



The user can use the **Refresh** button to update the display against the database. Once the statement(s) or document(s) has been sent, the job line will disappear from the bottom grid and re-display back in the top grid.

The statements or documents that are displayed can also be exported in Excel, Word, or CSV format by clicking the **Export** button. Individual statements or documents cannot be exported. Using the Export button exports all the displayed data.

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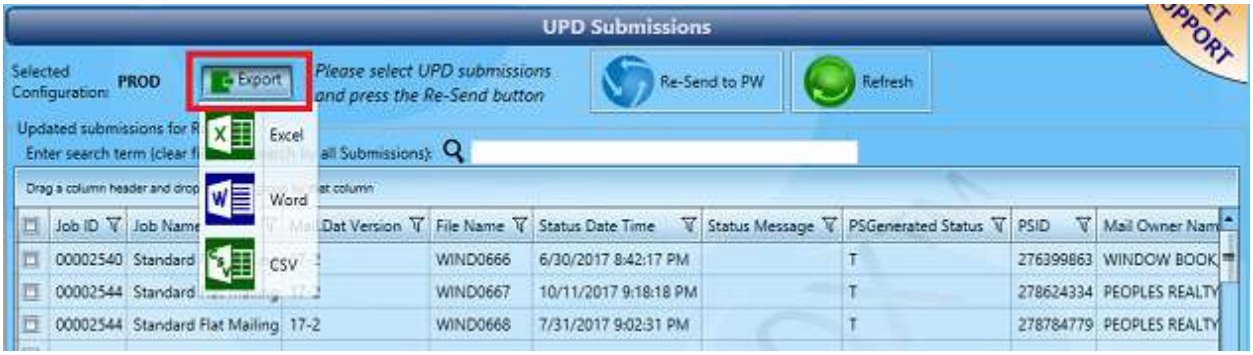
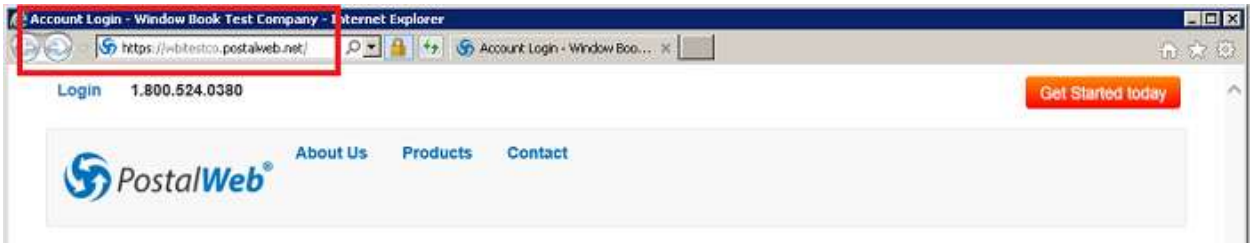


POSTALWEB LINK

From PostalWeb Desktop Dashboard's main or home screen, clicking the **PostalWeb®** button launches a web browser and displays one of two pages for PostalWeb.

If a Client has a company-specific PostalWeb site with a location provisioned in PostalWeb Connector, the page displayed will be the company specific PostalWeb sign-in page (in the example being used here, the Client-specific sign-in page is for "Window Book Test Company", which is also identified in the URL used).



Refer to the PostalWeb Setup Guides for more information on registering a company-specific PostalWeb site. The Guides are available via the Support Portal on the Window Book web site at: https://windowbook.na2.teamsupport.com/login/user. Registration and/or login is required.

If a Client does not have a company-specific PostalWeb site, the displayed page will be the general Home screen for PostalWeb (i.e. http://www.postalweb.net).

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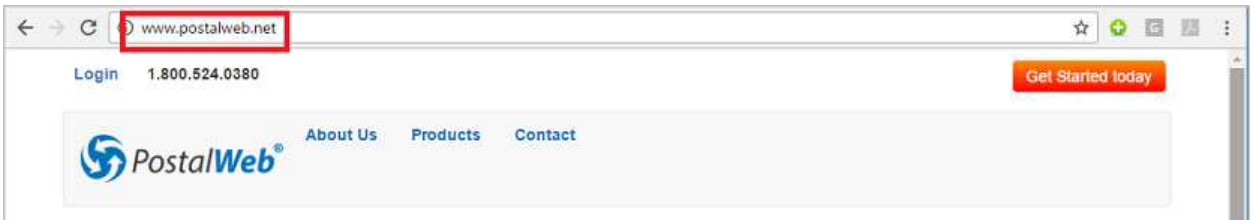
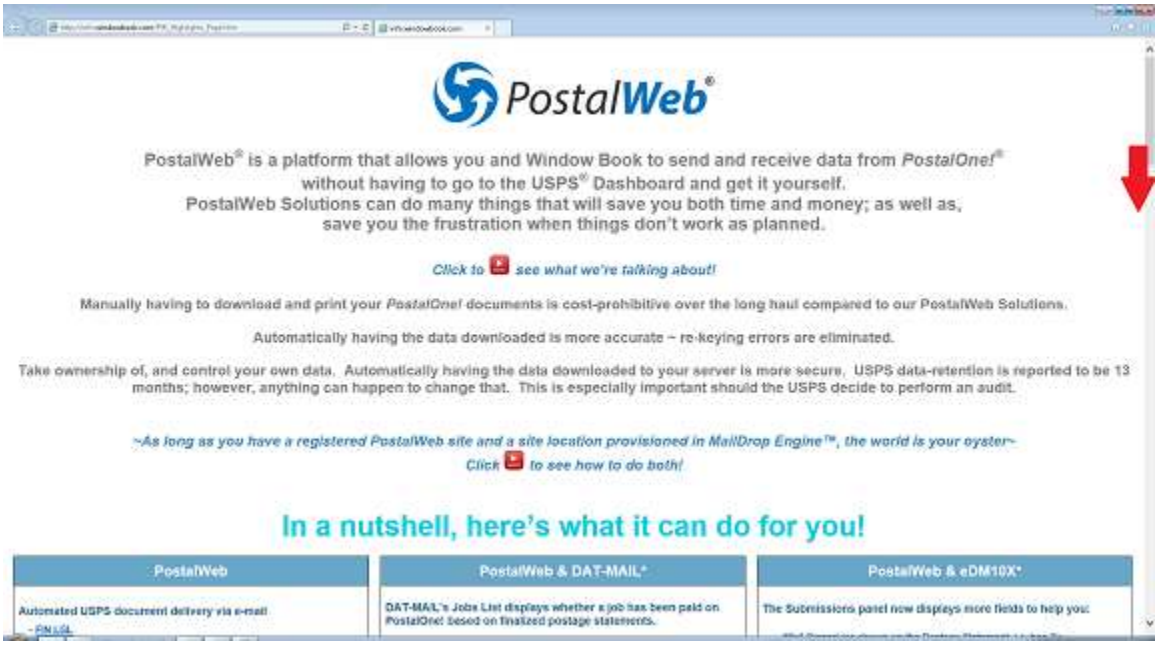


POSTALWEB - FIND OUT WHAT YOU'RE MISSING

From PostalWeb Desktop Dashboard's main or home screen, clicking the **PostalWeb® Find Out What You're Missing** button launches a web browser and displays an html page that outlines the benefits of adding PostalWeb to your PostalWeb Desktop Dashboard and/or DAT-MAIL solution(s). Included are screen images, video demonstrations, and hyperlinks to example documents, making this a very easy to read and informative feature.



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BUSINESS CUSTOMER GATEWAY LINK

From PostalWeb Desktop Dashboard's main or home screen, clicking the **Business Customer Gateway** button launches a web browser and displays the sign-in page for USPS' *Business Customer Gateway*.

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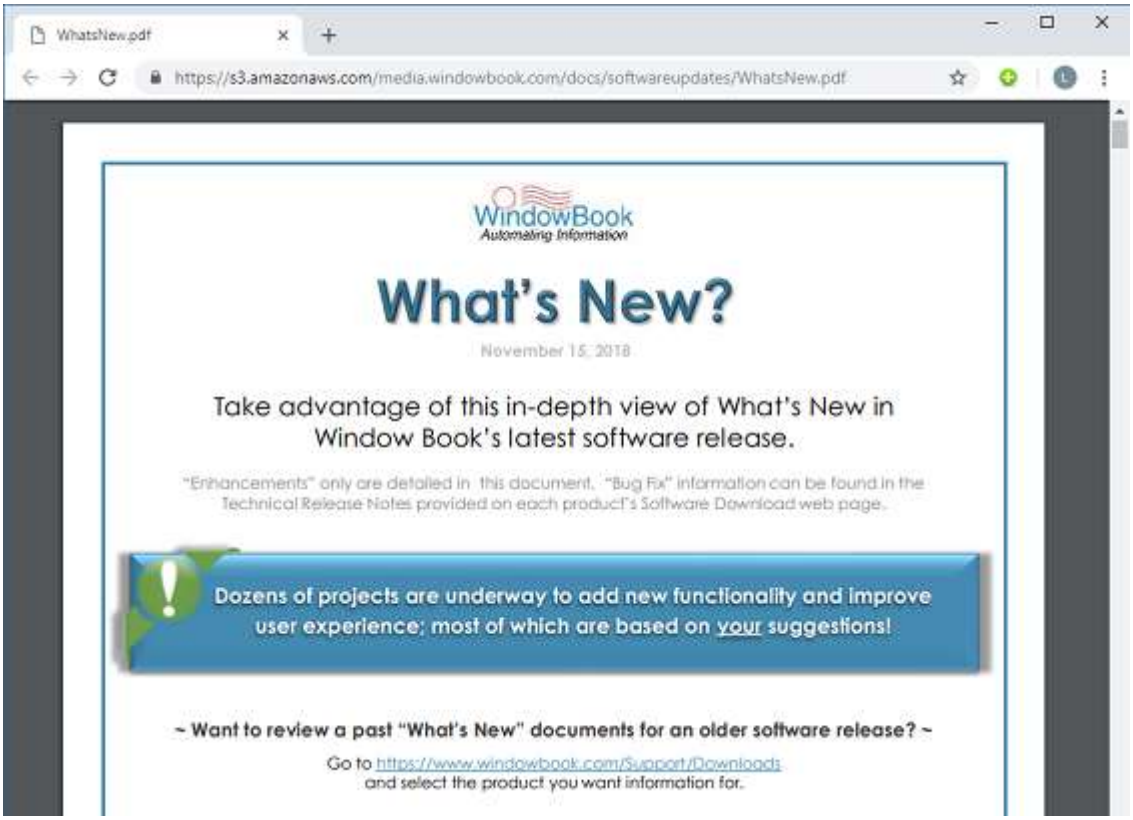
WHAT'S NEW BUTTON

Clicking the **What's New** button launches a web browser that displays the most current "What's New" document (PDF). Depending on the default web browser being used, the PDF may become available in download format vs. displaying in the web browser.



"What's New" is a document that Window Book publishes every time there is a software release. It's an easy to use, valuable reference that details the enhancements being released in each product and contains light instructions, video demonstrations, links to documentation, etc. It also contains (when applicable) critical information about the software being released such as known issues or required steps that must be taken by the Client.

The document that is launched from within PostalWeb Desktop Dashboard is the version specific to the latest software release and not specific to the version of software the Client has installed. Clients can easily view the What's New document that pertains to the version of software they have installed on their system by following the instructions provided on the document's cover page.

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STATEMENT VIEWER BUTTON

The STATEMENT VIEWER button will only display if a client-specific PostalWeb site has been provisioned in PostalWeb Connector.

Clicking the **Statement Viewer** button launches the Statement Viewer utility. The Statement Viewer allows users to view, print, save, and send their USPS®-generated documents (i.e. confirmation and registration pages, finalized statements (i.e. 3607s Legal and BCG), UPDs, Update Statements, EVS Statements, and Qualification Reports), right from their Desktop. Specific document types (e.g. finalized statements) can be set to auto-print to a certain printer, such as one located in an accounting department, as soon as the statements become available.

The Statement Viewer button is also available from the Submissions Panel.

There are a few requirements for being able to access and use the Statement Viewer:

- Clients must have their PostalWeb site provisioned in their PostalWeb Connector software (refer to the "PostalWeb Connector Installation & User Guide"; specifically, the section titled "PostalWeb", for instructions. The Guide is available via the Support Portal on Window Book's web site at: https://windowbook.na2.teamsupport.com/login/user. Registration and/or Login is required);
- Within their PostalWeb site, clients have to be subscribed to the PDF and/or XML statement transfer service for the USPS-generated documents they wish to receive via download to their server (for instructions on how to subscribe to services in PostalWeb, refer to the PostalWeb User Guides found via the Support Portal on Window Book's web site at: https://windowbook.na2.teamsupport.com/login/user. Registration and/or login is required); and
- Clients must specify and configure the folder name(s) and location(s) within their PostalWeb Connector software of where the USPS-generated statements and documents will be delivered to on their server (refer to the "PostalWeb Connector Installation & User Guide"; specifically, the section titled "PostalWeb", for instructions. The Guide is available via the Support Portal on Window Book's web site at: https://windowbook.na2.teamsupport.com/login/user. Registration and/or Login is required). **If operating in a server with workstation(s) environment, make sure to use UNC path names for the folder locations in PostalWeb Connector to ensure that all workstations with the Statement Viewer can access the information.**

Once the Statement Viewer is launched, it becomes independent of PostalWeb Desktop Dashboard. Users do not have to leave their PostalWeb Desktop Dashboard software open in order to be able to view and/or use the Statement Viewer.

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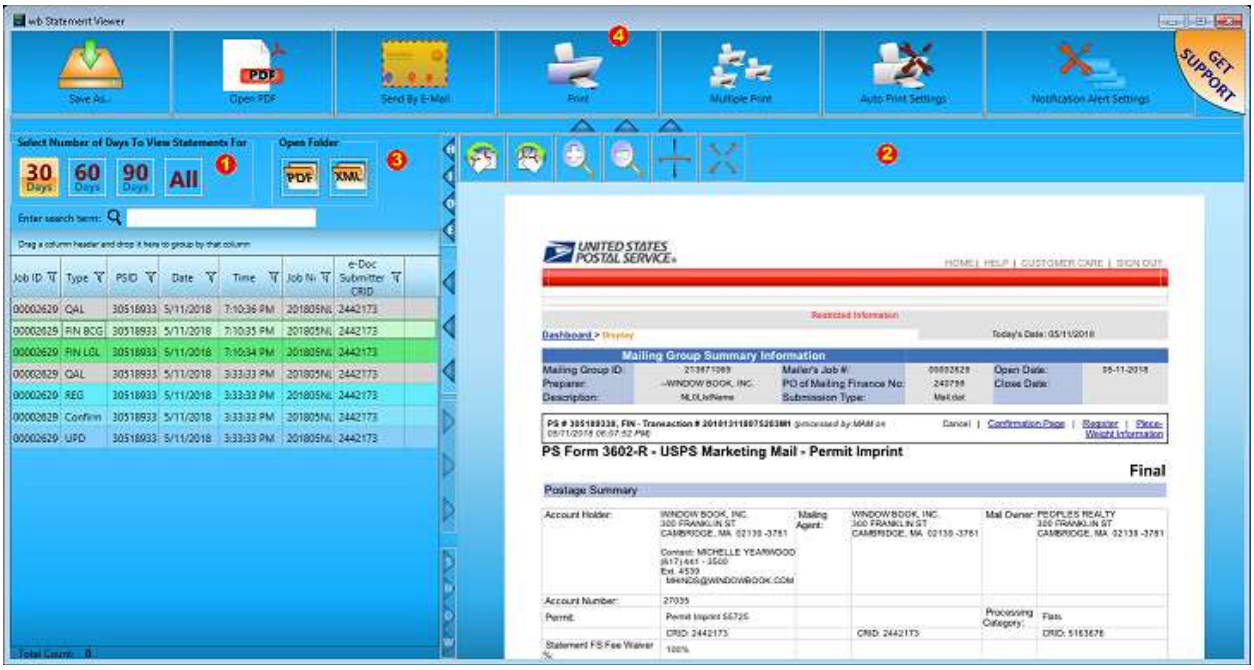
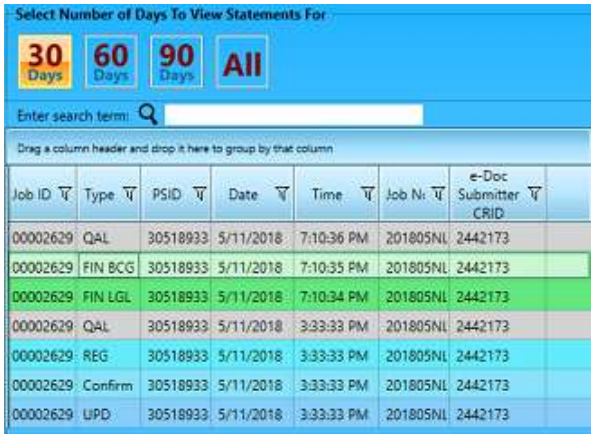
For the Auto Print Settings function to work properly, the Statement Viewer must be opened/running, but can be minimized on the computer.

Statement Viewer - Description & Use



The Statement Viewer screen is comprised of four elements: the Document List (1); the Viewer (2); the Open Folder function (3); and the Button Menu (4).

- **Document List (1):** This element of the Statement Viewer will display all the available documents or statements that have been returned from *PostalOne!* and are available to the Client. The different types of documents or statements are color-coded to make identification easier. The newest or most recently received documents or statements will display at the top of the list.



The number of documents that display can be controlled by the user. The options for the number of documents to display are: '30 Days'; '60 Days'; '90 Days' and 'All'.

The following information for each document or statement is provided in columnar format: Job ID; Job No.; Type of document or statement (e.g. Confirmation); PSID associated with the document, document Date; document Time, The Job No. associated with the document, and the e-Doc Submitter CRID associated with the document.

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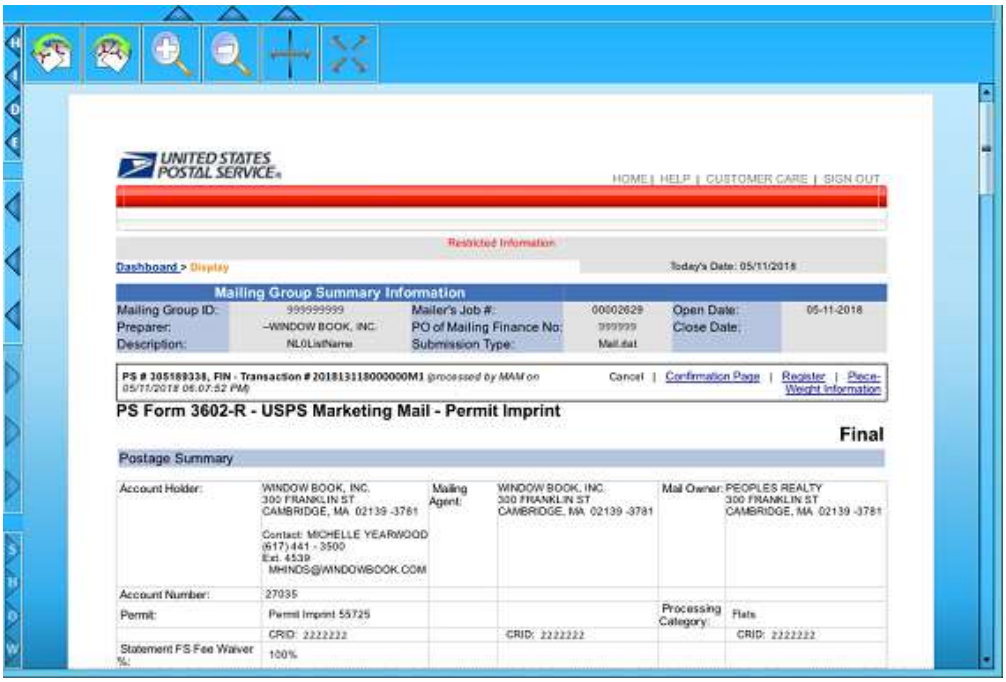
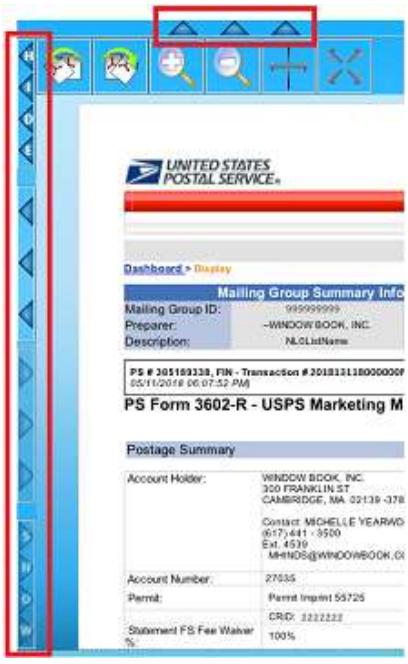
Each column width can be adjusted; as well as, grouped, sorted and filtered (refer to the FILTERING, SORTING, AND GROUPING DATA section in this Guide for more information on how each of these functions work).

In addition, users can search for a specific document or statement by entering search criteria in the 'Enter search term' field;

- **Viewer** 2**:** This element of the Statement Viewer is where the selected document or statement will display.



The display area of the Viewer can be maximized both horizontally and vertically by clicking the corresponding directional arrows. When the vertical arrows are clicked, the Button menu located at the top of the page will be hidden, and when the horizontal arrows are clicked, the Document List will be hidden either totally or in increments. Click the arrows again or click the "SHOW" arrows to unhide each element.



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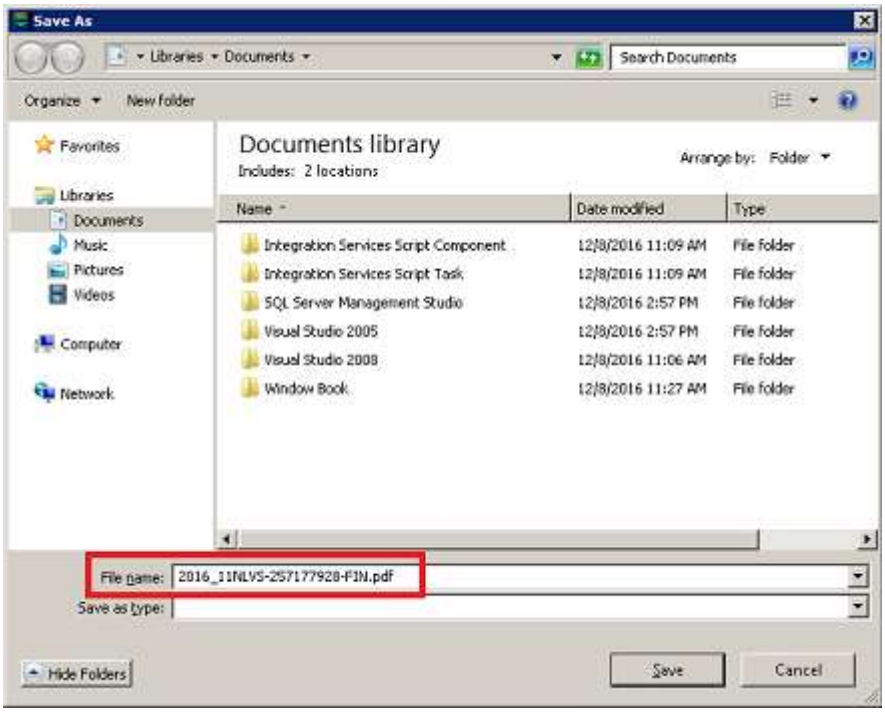
The Viewer also contains icons that allow the user to control the display of the selected statement or document. They are: rotate (counter clock-wise and clock-wise); zoom (in and out), and fit-to-width or fit-to-page.

- **Open Folder Function** 3: The Open Folder function allows the user to access the folder on the server where either PDF or XML download documents are saved to.

- **Button Menu** 4**:** The Button Menu contains buttons that control the various the functions provided by the Statement Viewer.

  - **Save As...** : Clicking this button launches a *Save As* dialog, allowing the user to save a displayed document or statement to the computer in a different location;



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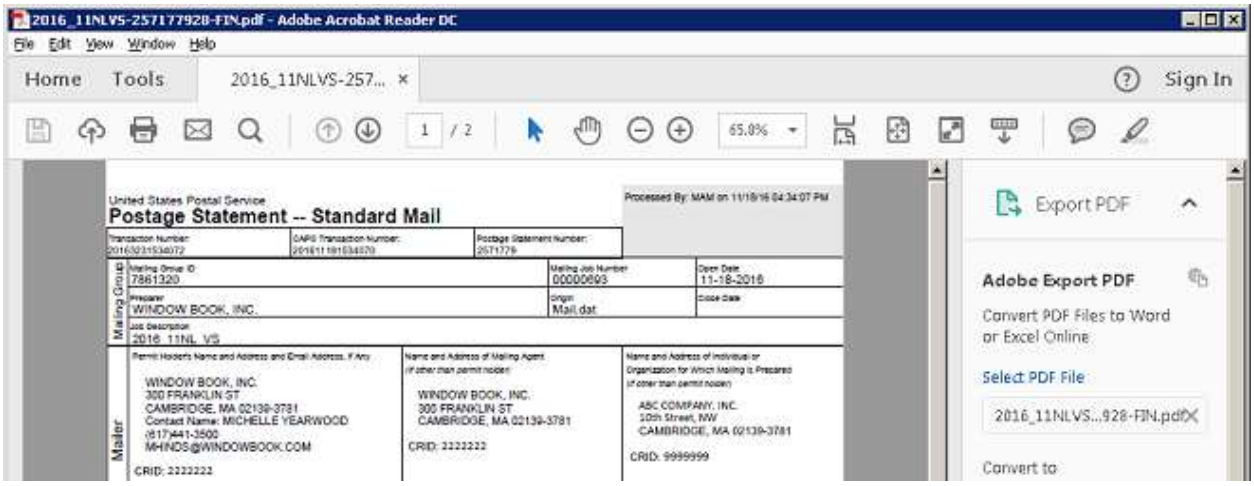
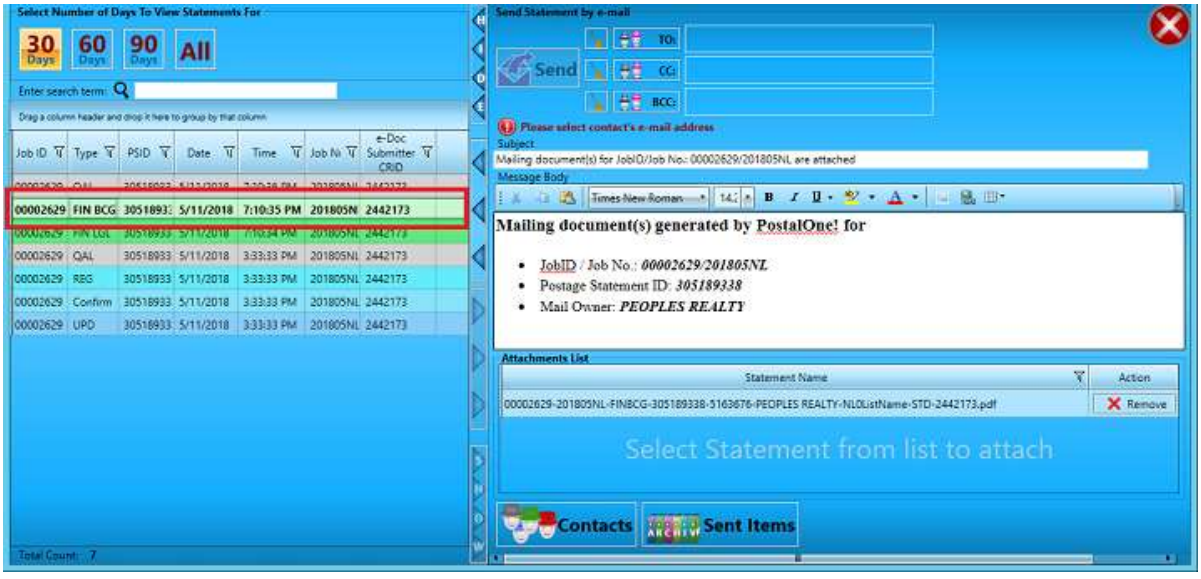
- **Open PDF** : Clicking this button allows the user to open the displayed document or statement as a PDF file, outside of the Statement Viewer (assuming a PDF viewer exists on the computer being used);



- **Send By E-Mail** : Clicking this button displays the *Send Statement by e-mail* screen. Whatever document or statement was highlighted or selected is automatically selected for sending via e-mail as an attachment (note the document information in the Document List becomes bolded).



Users can create and maintain a Contacts List for inserting the recipient information. Click on the 'To' field.

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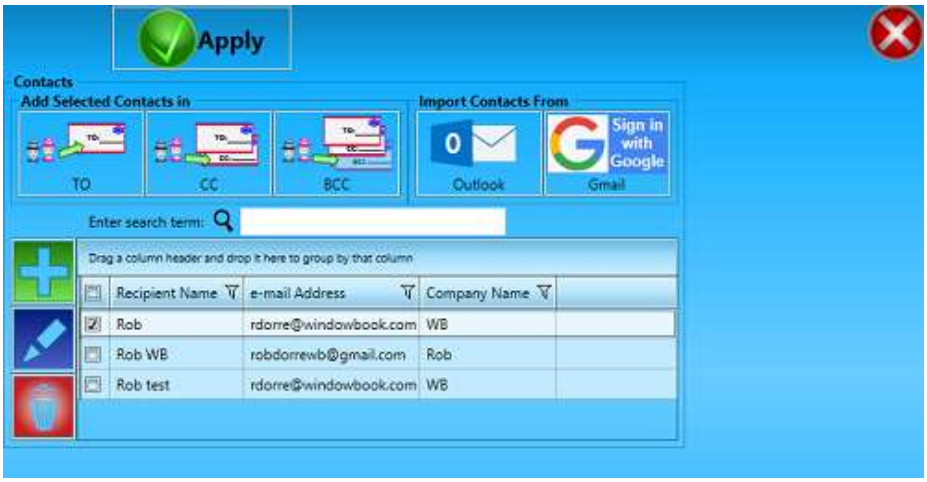
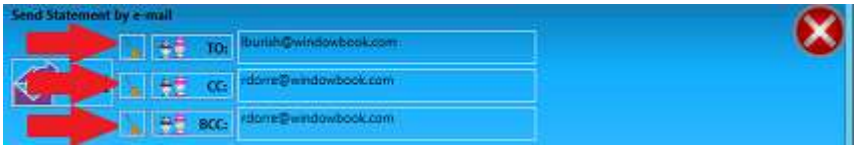
The Contacts List will display. Contacts or recipients can be added to the list manually by clicking the plus '+' button, or they can be imported from an existing Outlook™ or Gmail™ account. Contacts can also be revised or deleted from the list by clicking the pencil or trash can buttons.



Select (check) the recipient(s) to send the e-mail to and click the **TO** button. Repeat the process for the 'CC' and 'BCC' fields. When finished, click the **Apply** button.

Clicking the 'X' in the red circle located in the top right corner of the screen to close the Contacts List will not add the recipient(s) to the e-mail. You must click the APPLY button to add recipients!

Selected recipients can be removed from the e-mail by clicking the delete button located to the left of the TO, CC, and BCC fields.



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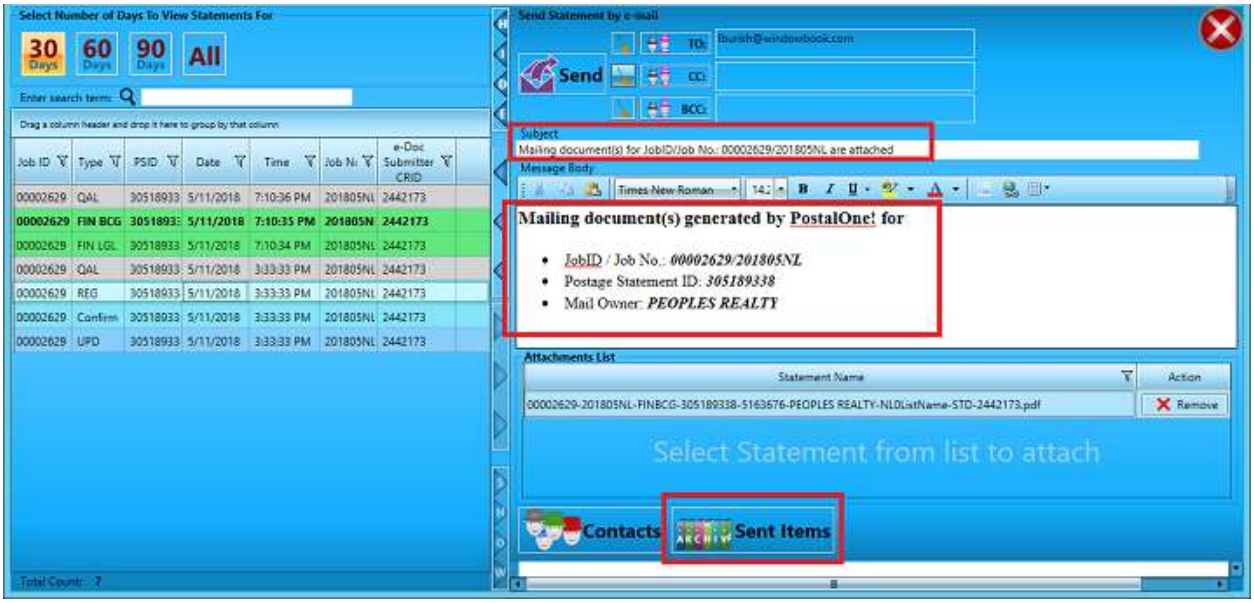
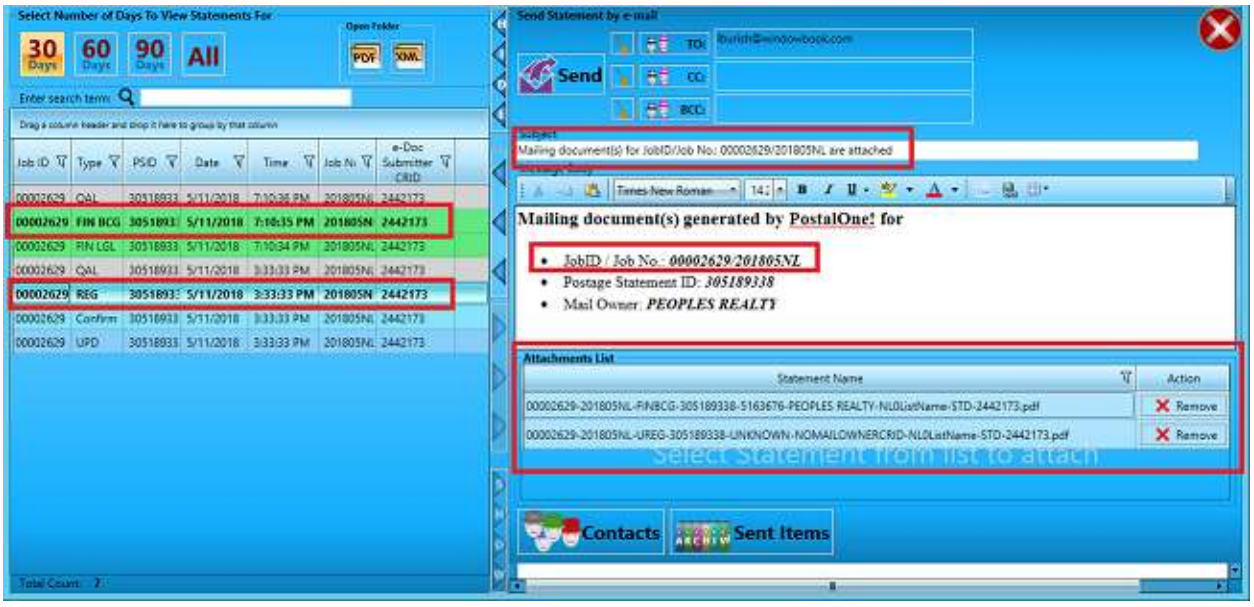
The e-mail's Subject line is populated with the related Job ID and Job No., and the job information by way of the Job ID and Job No., the Postage Statement ID, and the Mail Owner is displayed in the Message Body of the e-mail. The Statement Viewer also keeps a history or archive of all the Sent Items for easy reference.



To select additional documents to be sent in the same e-mail, simply click on the document or statement in the list. The document line will become bolded, the document will be attached automatically to the e-mail. The subject line will update to read "Mail document(s) for Multiple jobs are attached", and the job-related information will populate in the e-mail's message body.

To remove an attached document, simply click the document's corresponding **Remove** button from the Attachments List.



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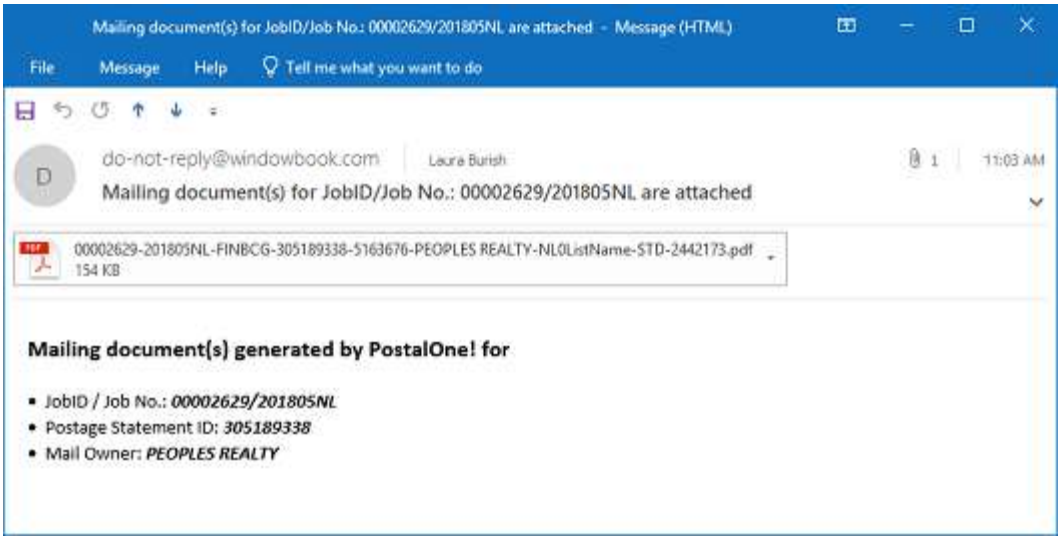
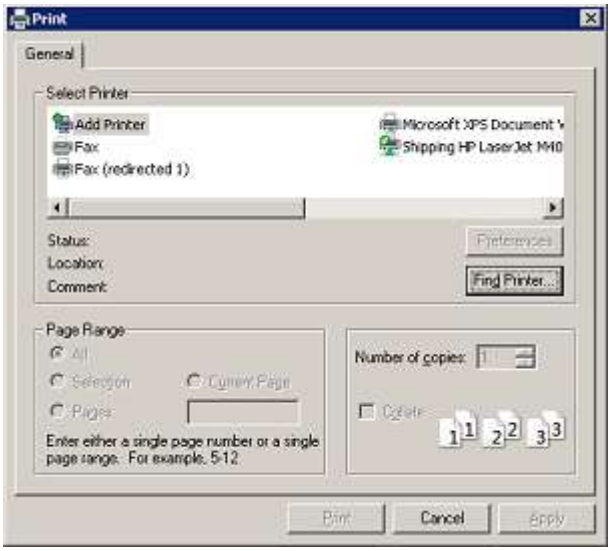
The *Send Statement by e-mail* screen will close and shortly after, a Desktop notification will display on the computer the e-mail was sent from;

The e-mail will be sent by 'do-not-reply@windowbook.com' with the document(s) attached;



To assist the insuring the successful receipt of e-mails from the Statement Viewer, follow the guidelines outlined on Window Book's "White List Help" web page: http://www.windowbook.com/Home/White-List-Help

- **Print** : Clicking this button displays a *Print* dialog and allows the user to print a selected document or statement to a local or network printer (depending on the computer's printer settings);



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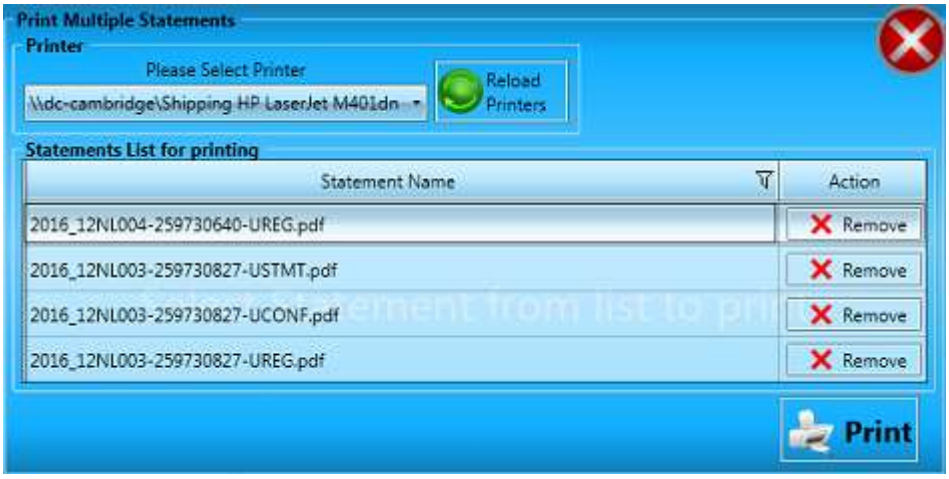
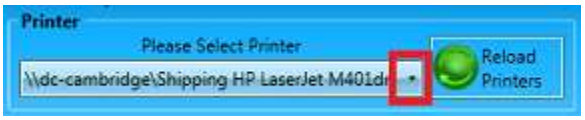
- **Multiple Print** : Clicking this button will display the *Print Multiple Statements* screen; from which, a batch print of multiple documents or statements can be performed.



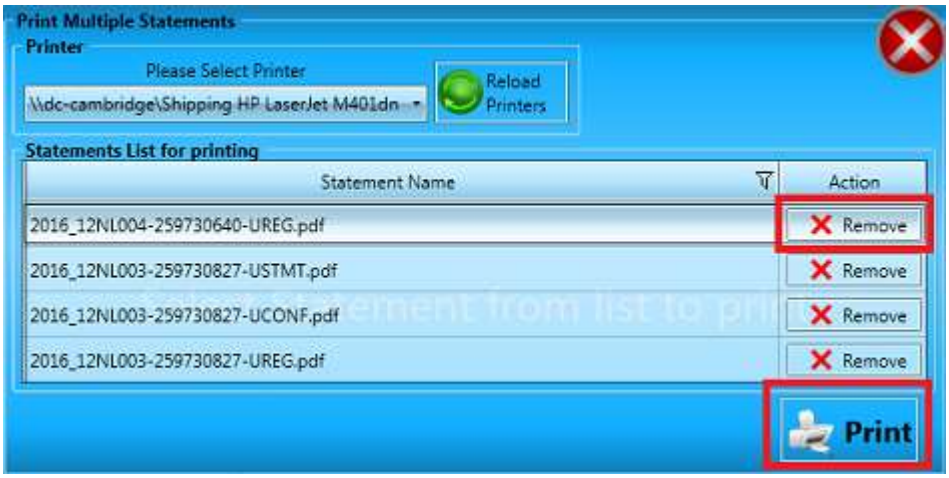
Select the printer to send the batch of documents/statements to by clicking the down arrow and selecting from the list provided (including PDF).

Printers or fax machines listed/loaded are based on the computer's printer settings. To re-load the available list of printers, click the RE-LOAD PRINTERS button.



Documents or statements to be printed are selected by single clicking on them within the Document List. A selected document or statement can be removed from the batch list by clicking the statement or document's corresponding **Remove** button.

To print the selected documents/statements in a single batch, click the **Print** button.



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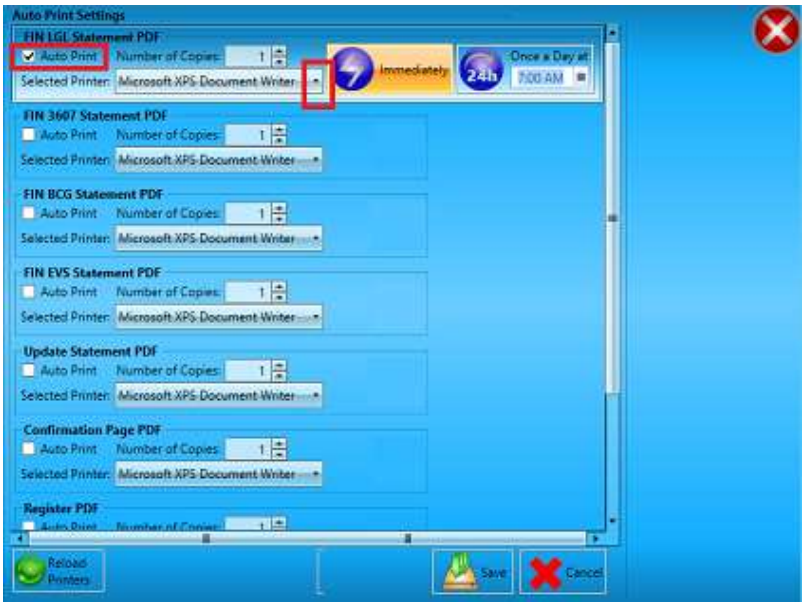
- **Auto Print Settings** : Clicking this button will display the *Auto Print Settings* screen; from which, the user can select a specific document or statement type to be automatically printed to a specific printer every time a document of that type becomes available. In addition, users can specify how many copies of each document should be auto-printed as well.

Once a document or statement type is selected (i.e. checked), the screen will update to display frequency options for when they should be sent. The two options are: 1) 'Immediately' as individual documents or statements become available; or 2) 'Once a day at' a given time, which is selected/set by the user.

A printer the documents or statements should be automatically sent to must be selected from the drop-down list provided.



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Printers or fax machines listed/loaded are based on the computer's printer settings. To re-load the available list of printers, click the RE-LOAD PRINTERS button located in the bottom left corner of the screen.

Click the **Save** button to retain any settings made or click the **Cancel** button (any settings made will not be retained when the screen is closed).

Every time the Auto Print function is activated (an auto print occurs), a Desktop notification is sent, similar to the one that is generated when the Send By E-Mail function is used (see above).

For the Auto Print Settings function to work properly, the Statement Viewer must be opened/running, but can be minimized on the computer.

- **Notification Alert Settings** : Clicking this button displays the *Notification Messages Settings* screen; from which, users can cancel the Desktop notifications that display on the computer when the 'Send By E-mail' function and Auto Print functions are used, and/or when new documents or statements are received, by selecting (checking) the corresponding box.

Click the **Save** button to retain any settings made and close the screen or click the **Cancel** button to close the screen (any settings made will not be retained).

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HOW IT WORKS

Where and when files are moved on the server (or computer in a stand-alone environment) is controlled by the active configuration that was created in PostalWeb Connector.

The active configuration uses the log files generated by P1 to decide where the files should be placed on the server/computer. They are used to update the 'Logged Event' column in the *Submissions* panel of PostalWeb Desktop Dashboard and to generate log event notifications to the user(s) via e-mail. The active configuration also uses the P1 receipt files to update the 'P1 Release Status' field in the *Submissions* panel (see screen image below) and to also send receipt event notifications to the user(s) via email.

Within the *Submissions* panel, an MDR Client configuration can be selected by clicking the corresponding drop-down arrow. Any/all jobs that were submitted to P1 using this configuration will then display in the table located in the middle of the panel.

There are five job or submission retention folders on the server (or computer in a stand-alone environment) that Mail.dat files will and/or can be moved to during the submission and validation process. If the Window Book template in PostalWeb Connector was used to create the MDR Client configuration, the folders will be located at and named as shown below:

- \\...WB\MDRClient\[MDRClientType]**DAT-MAIL-Export**
  (e.g. \\...WB\MDRClient\TEM\DAT-MAIL-Export);
- \\...WB\MDRClient\[MDRClientType]**Export**;
- \\...WB\MDRClient\[MDRClientType]**Successfully**;
- \\...WB\MDRClient\[MDRClientType]**Failed**; and
- \\...WB\MDRClient\[MDRClientType]**Rejected**.

For the purpose of this Guide, it is assumed that the MDR Client configuration was created using the Window Book template in PostalWeb Connector. If the Window Book template in PostalWeb Connector was not used, the location and names of these folders may differ.

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SUBMITTING TO *POSTALONE!*

This section assumes that statements were generated from DAT-MAIL for a particular job, and then a release was created to PostalOne!.

For documentation purposes, the MDR Client used in this section is 'TEM'. However, the same information and instructions can be applied if the MDR Client used is 'PROD'.

When using PostalWeb Desktop Dashboard with DAT-MAIL, Mail.dat files to be uploaded or submitted to *PostalOne!* (P1) are automatically placed in the "DAT-MAIL-Export" folder associated with the MDR Client specified in DAT-MAIL. If not using DAT-MAIL, Mail.dat files can also be placed in the appropriate, corresponding "DAT-MAIL-Export" folder manually by the user, or automatically through any presort or post pre-sort software application provided a script is created to do so.

When a file is placed in the "DAT-MAIL-Export" folder, communication is attempted with P1. If, after three attempts, communication is unsuccessful, an "MDR Error Uploading" log event is generated. At this time, the Submissions panel is updated with the job or submission information and a status message of "MDR Error Uploading. Re-submit via QuickFix" displays, and the job is moved to the 'Rejected' folder on the server.

In addition, if a user(s) is set up to receive log event notifications in PostalWeb Connector; specifically, the 'MDR Error Uploading' log event, a system-generated e-mail is sent notifying the user(s) of the issue.

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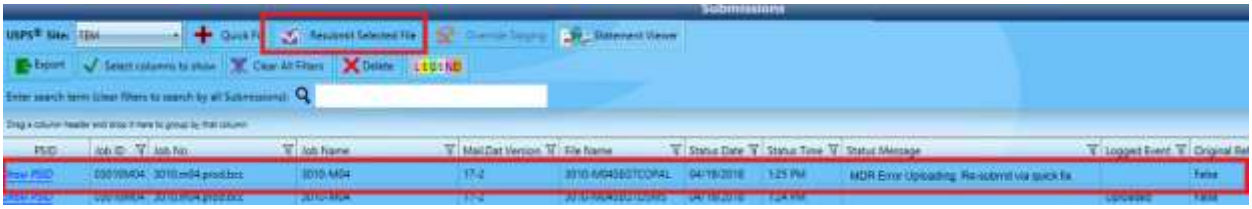
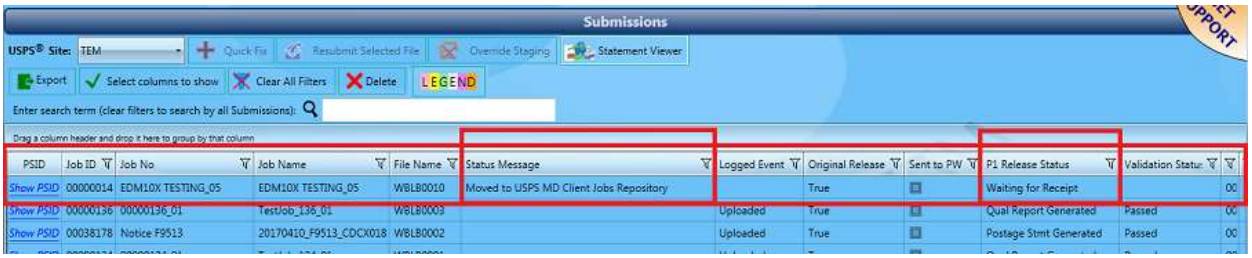
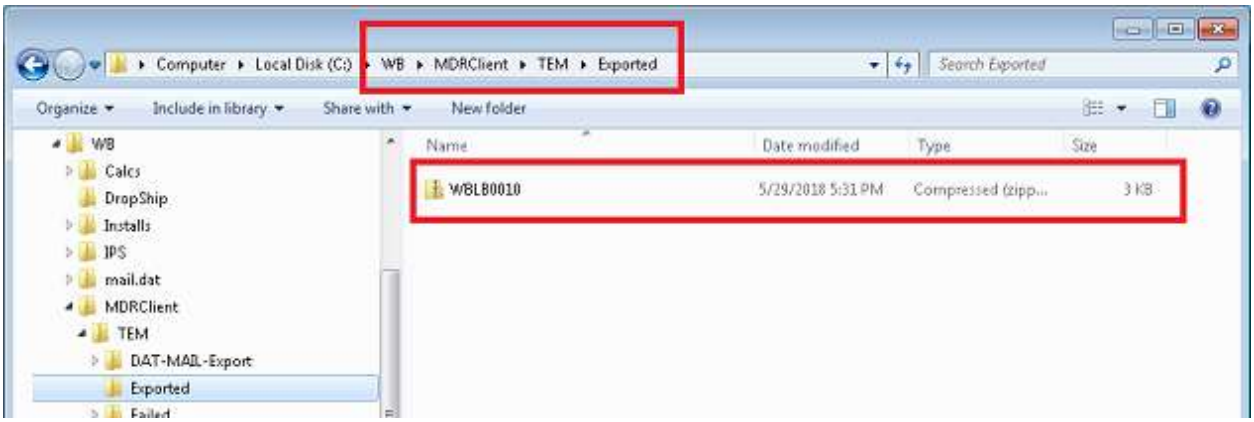
To remedy the situation, the user simply must select the file in the Submissions panel and click the **Re-submit Selected File** button to attempt the upload again.



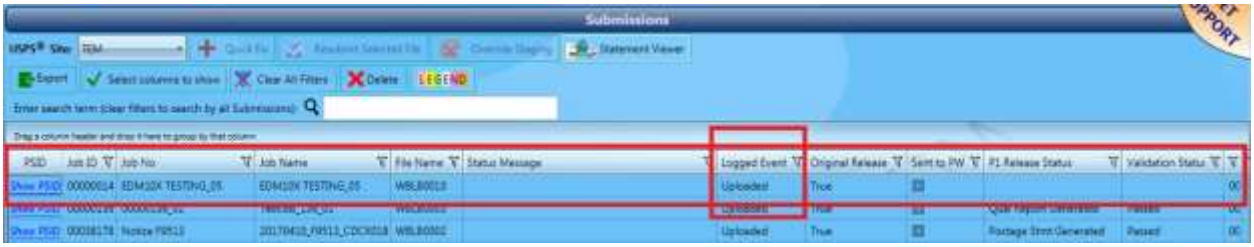
As long as PostalWeb Connector can establish communication with P1 when a file is placed in the "DAT-MAIL-Export" folder, an 'event' is recorded, and the PostalWeb Desktop Dashboard Submissions panel is updated with the job or submission.



Once a file is placed in the "DAT-MAIL-Export" folder it goes through a Window Book staging process (refer to Staging Logic for more information). After it passes the staging process, the file or submission is moved to the "Exported" folder and a log event is recorded in the system.



When this occurs, the PostalWeb Desktop Dashboard *Submissions* panel refreshes and the 'Logged Event' field is updated to a value of "Uploaded".



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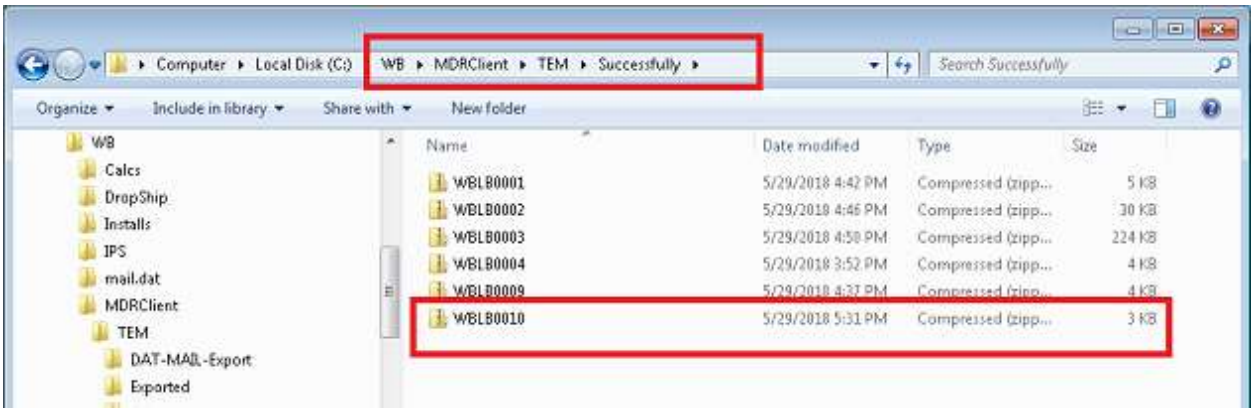
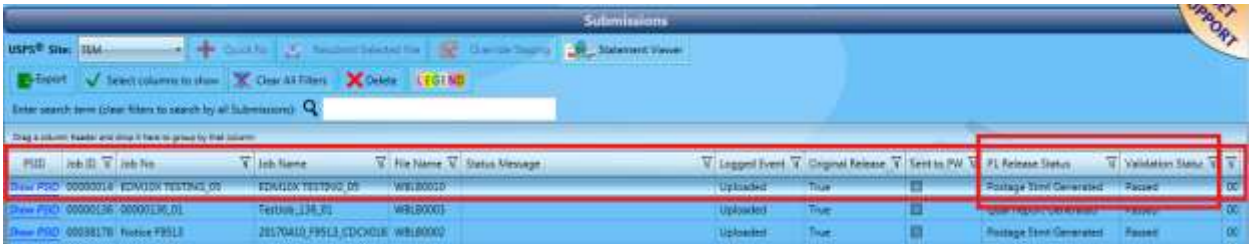
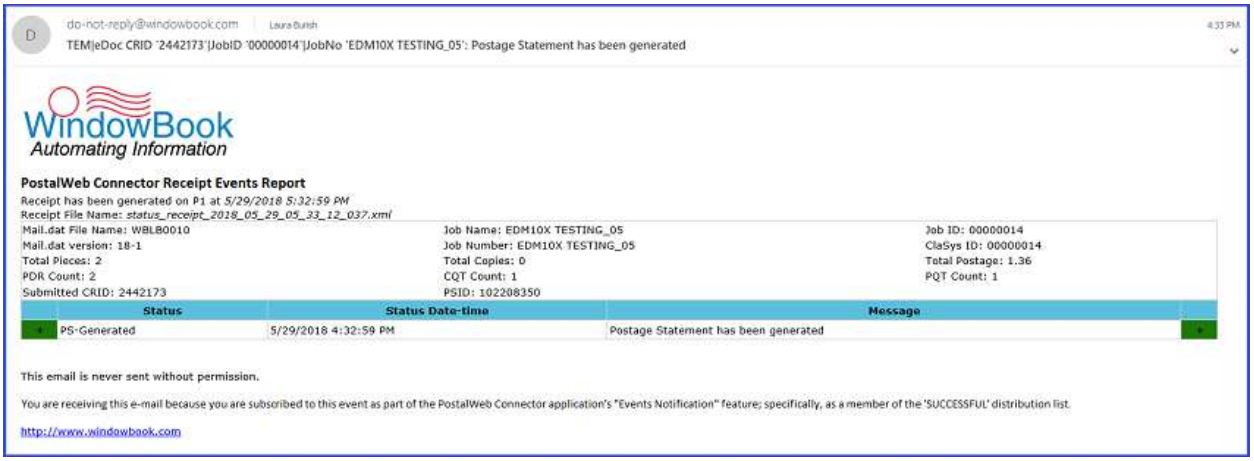
At this point the P1 validation process begins. If a submission passes P1 validation, the Mail.dat file or job is moved to the appropriate MDR Client's "Successfully" folder:
" \\...WB\MDRClient\TEM\Successfully".



P1 generates a receipt file and the PostalWeb Desktop Dashboard *Submissions* panel refreshes and displays the new status of the successful submission.



In addition, once the receipt file is received, and if the user has the Events Notification enabled in PostalWeb Connector; specifically, the Passed Receipt Event "PS-Generated", the user will receive an e-mail notifying them that a statement has been generated (see example below).



There are multiple types of receipt event notifications that can be activated to meet each Client's needs. Refer to the "PostalWeb Connector Installation & User Guide"; specifically, the 'Events

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Notification" feature for more information. The Guide is available via the Support Portal on Window Book's web site at: https://windowbook.na2.teamsupport.com/login/user. Registration and/or login is required.

While receipt events are being recorded during the validation process, so are log events. PostalWeb Desktop Dashboard also provides notifications to users for specific log events as well (i.e. Successful, Failed, Rejected, and MDR Error Uploading). If a successful log event notification was enabled, the user would also receive an email notification when the statement is generated.

Although log event notifications are limited to just four event types (i.e. Successful, Failed, Rejected, and MDR Error Uploading), log events are often received in a more timely fashion than are receipt events. Therefore, log event notifications are sometimes sent before receipt event notifications if a job was Successful in uploading to P1, Failed the P1 validation process, was Rejected, or the PostalWeb Connector was unable to establish communication with P1 (MDR Error Uploading). Refer to the "PostalWeb Connector Installation & User Guide"; specifically, the 'Events Notification" feature for more information. The Guide is available via the Support Portal on Window Book's web site at: https://windowbook.na2.teamsupport.com/login/user. Registration and/or login is required.

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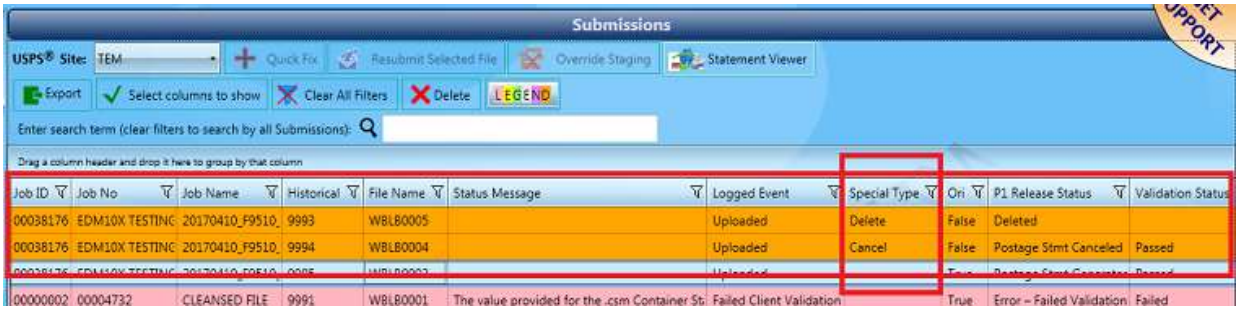
Staging Logic

Files are uploaded to P1 in sequential order – in other words, in the order they are submitted. If a job fails, this does not impact the uploading of a new/different job. In other words, if job number 1 is submitted and fails and job number 2 is submitted, job number 2 will continue to be uploaded.

This is not true for single jobs that have multiple submissions. Multiple submissions for a single job are uploaded in sequential order using the 'Historical Hdr Sequence Number' (QuickFixing a file will not change the Historical Hdr Sequence Number). The next submission in line will not begin the upload process until the previous submission for that job uploaded successfully. The 'Submissions' screen in PostalWeb Desktop Dashboard will have each submission listed with a status of 'Pre-staging' (the line items will be gray in color) until such time as a submission is uploaded to P1. In addition, the 'Status Message' field will also provide which submission it is waiting for before it too can be uploaded. If one submission for a job is uploaded and fails, any submissions that were released after the failed submission will not upload until the failed submission is QuickFixed, resubmitted, and accepted by P1. If a job has multiple submissions and a user deletes one of them from within PostalWeb Desktop Dashboard, any other submissions for that job that occurred after the deleted submission (submissions with a status of "Pre-staging") will never be uploaded to P1. They too would have to be deleted. All deleted submissions would then have to be re-released.

IMPORTANT: There is one exception to this rule. Cancel statement submissions and delete job submissions will not be moved to pre-staging due to their status. These submission types are denoted in PostalWeb Desktop Dashboard with "Cancel" or a "Delete" in the 'Special Type' column of the *Submissions* panel. These types of submissions will by-pass the general staging logic and be uploaded to P1. Once uploaded, these line items will turn orange in color.



With this sophisticated staging logic, submissions are sequenced, thereby reducing validation failures. Submissions to P1 will be much more reliable, and multiple jobs can still be submitted simultaneously for faster processing. The staging logic involving "pre-staging" is only applied to multiple submissions released for a single job.

OVERRIDE STAGING BUTTON

In certain instances, the existing staging logic can cause a gridlock of submissions that may unable to be resolved using normal channels. Examples of such instances are:

- When server validation errors occur, but the Mail.dat still uploads. The user would need to put up a cancel statement and/or delete job request; however, the staging logic would not let the

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cancel/delete request upload because PostalWeb Connector sees the first submission as failed, even though the upload completed;

- When PAR errors occur, but the Mail.dat still uploads;
- When Qual Report Generation failed, but the Mail.dat still uploads; and
- When somehow, a Historical Header Sequence Number gets skipped.

As a work-around, Window Book has provided an **Override Staging** button on the Submissions panel that will circumvent the staging logic for a single submission and allow an upload to occur when the normal staging logic would not. Users would highlight the appropriate submission that is being held in pre-staging and click the **Override Staging** button. The upload of that file would be forced by the system, overriding the existing staging logic. The existing staging logic would then resume and be applied to the next submission in sequence.

It is very important for users to take note of the File Name and the Historical Header Sequence Number of the submissions that are being held in pre-staging to make sure the right submission (next in sequence) is being selected for staging override. Using the OVERRIDE STAGING button on the wrong submission that is being held in pre-staging could cause further issues.

The OVERRIDE STAGING button is intended for use in only those circumstances where a submission has been uploaded to P1 but is recorded as 'failed'. Using the OVERRIDE STAGING button in ways that it was not intended could result in jobs being uploaded out of order, the need to cancel or delete jobs, or cause Historical Header Sequence Number issues. Any of these issues could require the paid intervention of Window Book's Professional Services Team!

PostalWeb

If a Client has their own, company-specific PostalWeb (PW) site with a mailing location provisioned in their PostalWeb Connector software, PostalWeb Desktop Dashboard will notify users when a job(s) has been sent to and/or is available on their company-specific PW site. PostalWeb Desktop Dashboard does this through the *Submissions* panel by updating the box located in 'Sent to PW' field with a check-mark.

Only data associated with the PROD MDR Client is sent to PostalWeb.

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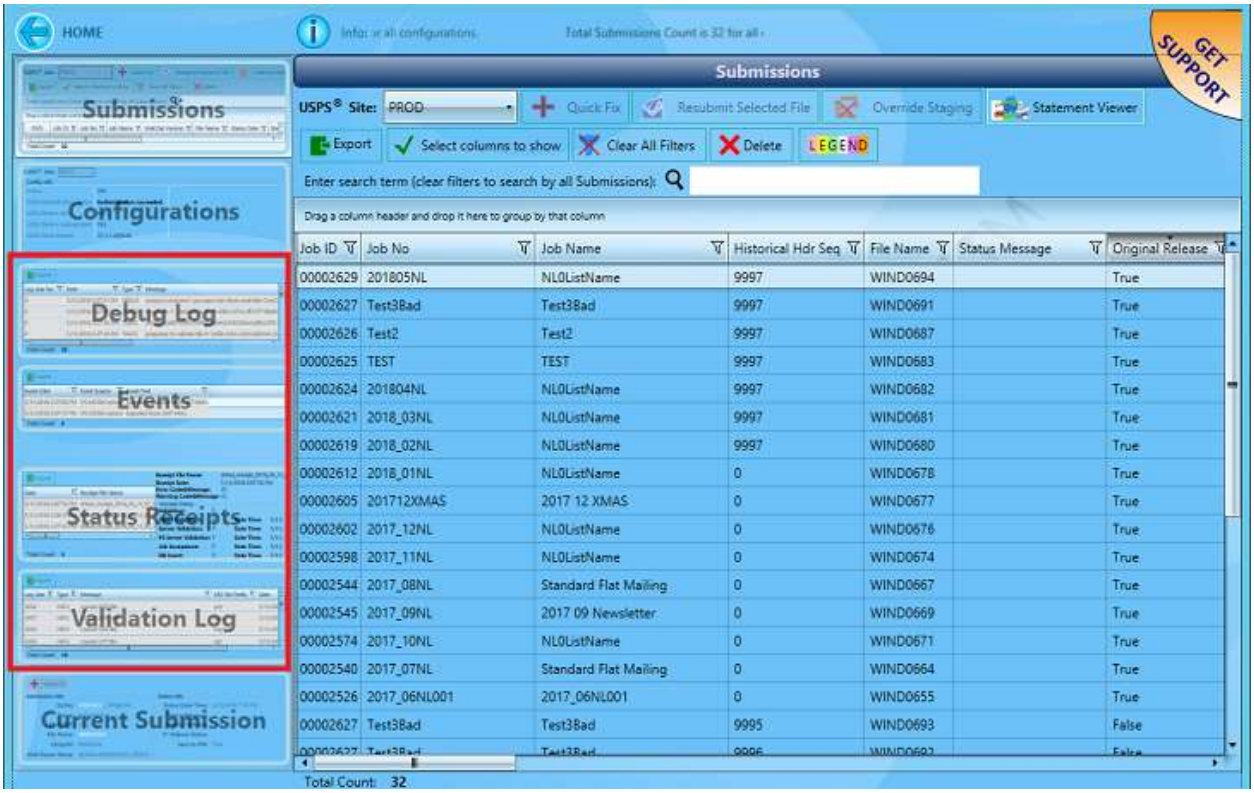
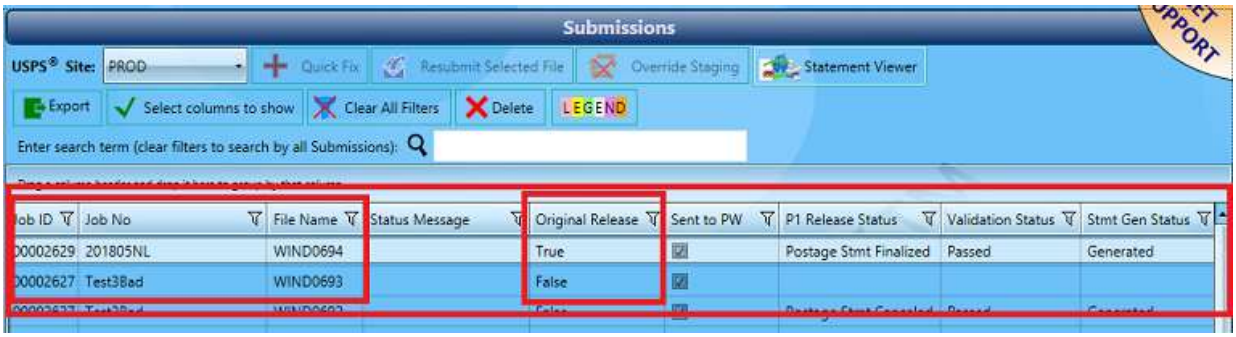
Additional Job Information

At any time, the user can view the 'Debug Log', 'Events' list, 'Status Receipts', and the 'Validation Log' for an individual job or submission by selected the job in the *Submissions* panel and clicking the corresponding button located at the left (see screen image below).



Submitting Partial Mailings

Client's using DAT-MAIL can submit a release to P1 without generating statements in the event they wish to perform partial mailings from one Mail.dat file. The main submission shows up as the original release in PostalWeb Desktop Dashboard ('Original Release' column reports a value of "True"). Additional submissions off of that same Mail.dat file report a value of "False" in the 'Original Release' field. The 'Job No' and 'Job Name' stay the same; however, subsequent submissions are given a separate 'File Name' to differentiate it from the original release.



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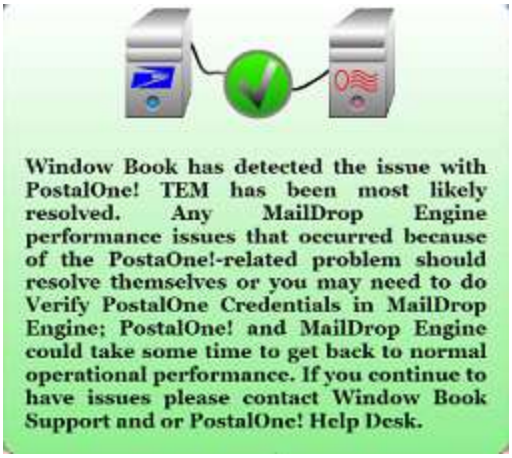
PostalOne! Is Down

In the event P1 goes down, PostalWeb Desktop Dashboard will display a message notifying the user of the event.

This notification will display on PostalWeb Desktop Dashboard's main screen, in the *Submissions* panel, and the *Messages* screen.

When the issue is resolved by P1, the displayed message will update, notifying the user of the resolution.



USING QUICKFIX

There are two submission statuses for jobs that do not successfully pass P1 validation: Rejected; and Failed. Rejected applies to those jobs that do not pass the Window Book staging process before being pushed to P1. Failed jobs are those submissions that pass the Window Book staging process, but then fail the P1 validation process.

The Mail.dat files that make up the job submissions that are either rejected or failed can be 'fixed' or corrected within PostalWeb Desktop Dashboard and re-submitted to P1 using the function called "QuickFix". Accessing QuickFix for a rejected or failed submission can be done in one of three ways:

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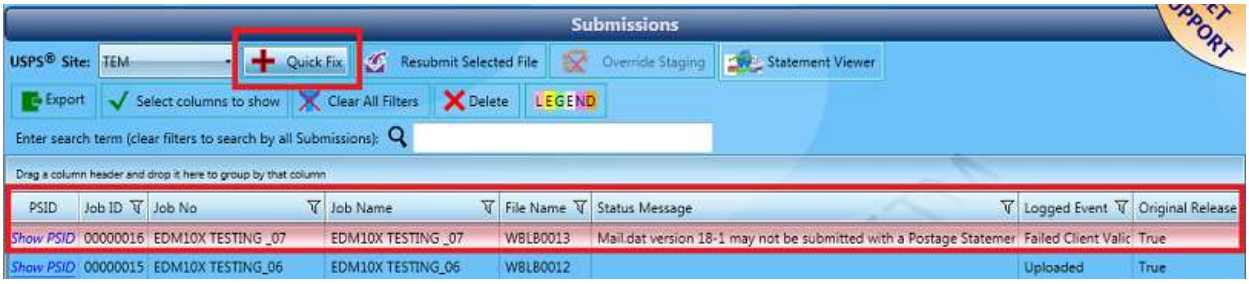
- Click the **Submissions** button from the main or home page in PostalWeb Desktop Dashboard to display the *Submissions* panel. If the rejected or failed job is displayed, select the job and click the **QuickFix** button (if the rejected or failed job does not display, make sure the correct 'USPS® Site' is selected);



- Click the **Submissions** button from the main or home page in PostalWeb Desktop Dashboard. Select the rejected or failed job or file in the *Submissions* panel (if the job does not display, make sure the correct MDR Client configuration is selected) and click the **Current Submission** button located on the bottom-left. The *Current Submission* panel will display the details of the selected job. Within the *Current Submission* panel click the **QuickFix** button; or

- Click the **QuickFix** button from the main or home page in PostalWeb Desktop Dashboard. Click the **Failed Submissions** button to view all the failed submissions or the **Rejected Submissions** button to view the rejected submissions. Jobs will be displayed in list format based on the MDR Client configuration selected (in the screen image below, 'TEM' is selected).

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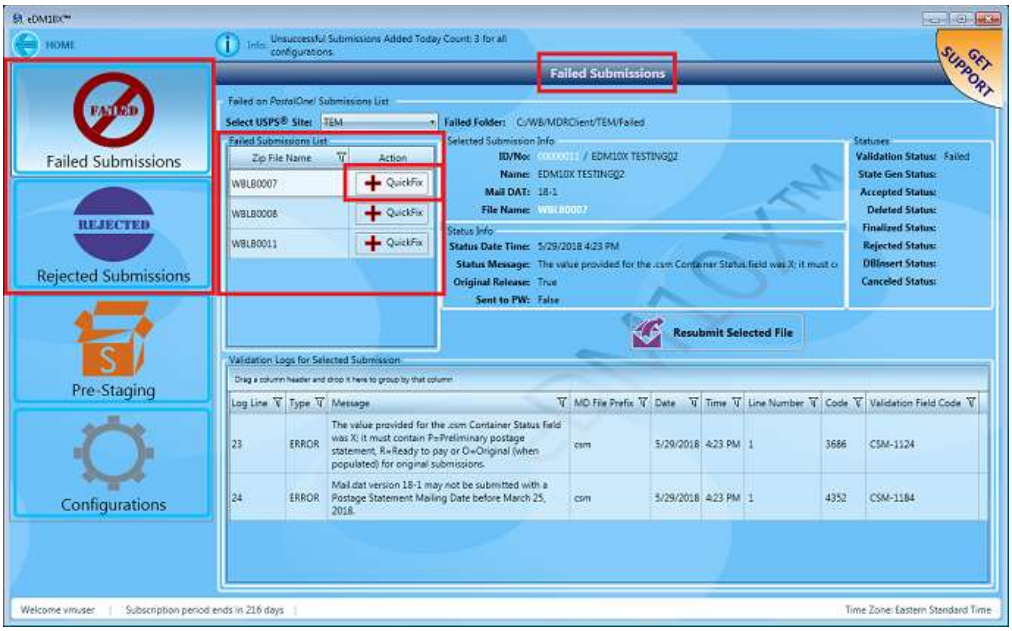
Click the **QuickFix** button that corresponds with the failed or rejected job to be fixed.



Rejected Submissions

Once a Mail.dat file is placed in the "DAT-MAIL-Export" folder it goes through a Window Book staging process. If it doesn't pass the staging process, the file or submission is moved to the "Exported" folder and almost immediately to the "Rejected" folder (in the example being used here, the file path for the folder would be: "\\...WB\MDRClient\TEM\Rejected").

When this occurs events are generated, at which point the PostalWeb Desktop Dashboard *Submissions* panel refreshes. The job line turns pink or red in color, so users can easily identify those jobs that have been rejected. In addition, the 'Logged Event' field is updated to a value of "Rejected" and the 'P1 Release Status' field to "Error – Job Rejected."

With the receipt of the rejected log and receipt events, e-mail and/or text message notifications would be generated/sent if the notification functions are enabled and configured for rejected files. Refer to the "PostalWeb Connector Installation & User Guide"; specifically, the 'Events Notification' section for more information. The Guide is available via the Support Portal on Window Book's web site at: https://windowbook.na2.teamsupport.com/login/user. Registration and/or login is required.

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One of the most common causes for a submission to be rejected is if the eDoc Sender CRID is missing and/or incorrect. If this occurs, the "Status Message" field in the *Submissions* panel will update to a message of "Your account does not have access to eDoc Sender CRID: NNNNNNN" ("N" referring to a number).

To resolve the issue, select the rejected job and click the **Quick Fix** button found near the top of the *Submissions* panel.

A screen will display showing the individual Mail.dat files that make up the Rejected or Failed submission (i.e. CQT, MCR, PQT, PBC, CPT, HDR, MPA, SEG, MPU, and CSM). Each Mail.dat file is represented by a thumb-nail image.

How errors are displayed differs between Rejected and Failed submissions. For Failed submissions, the file(s) that contains the error(s) and requires fixing is denoted by two red X's (versus the two green check-marks as seen in the image below). In addition, the validation logs that contain the error information are provided at the bottom of the screen (refer to the Failed Submissions section in this Guide for more information on fixing Failed submissions).

For Rejected submissions, this does not occur. QuickFix does not display red X's for the file(s) that contains the error(s), and no validation logs containing the error information are provided at the bottom of the screen.

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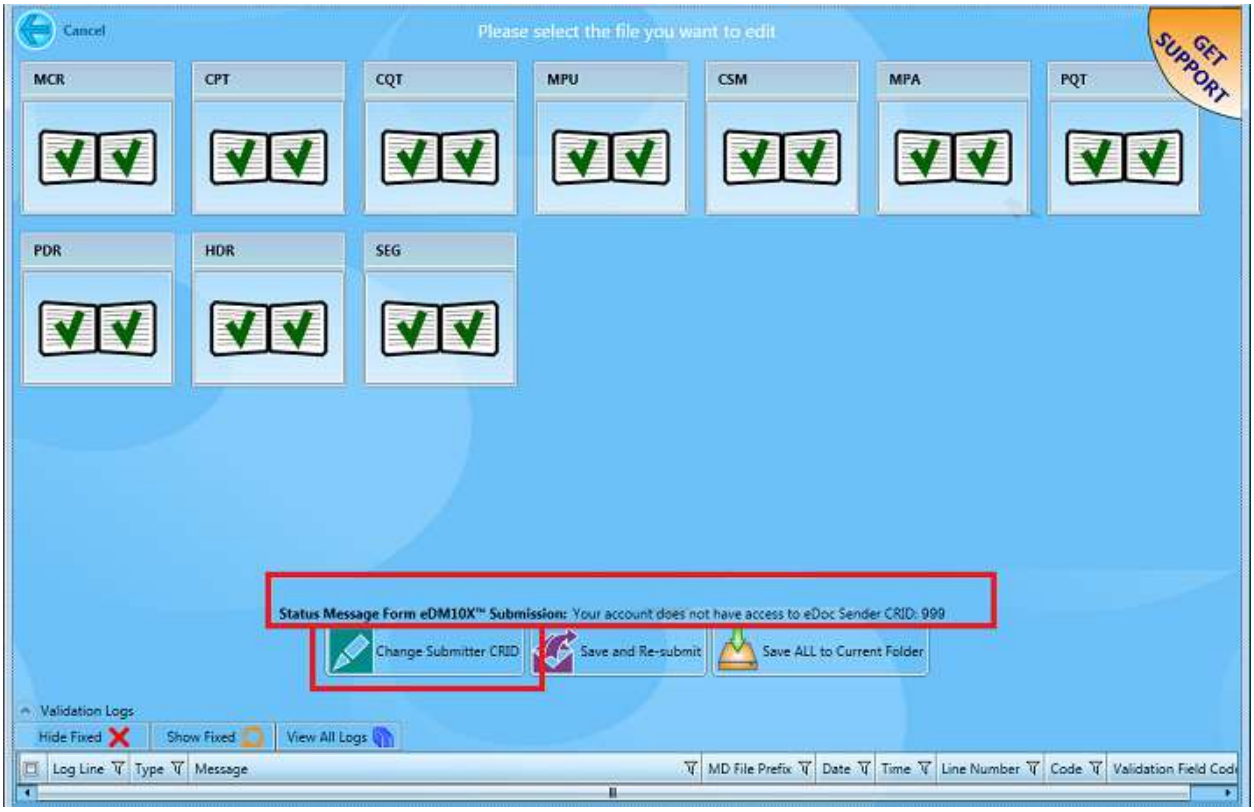
What does display, is the 'Status Message' from the Submissions panel which provides the error information – in this case, *"Your account does not have access to eDoc Sender CRID 999"*. Click the **Change Submitter CRID** button to correct the issue.



The current (incorrect) CRID will display (e.g. "999").

Enter the correct CRID and click the **Apply Changes** button.

With the correct CRID entered, click the **Save and Re-submit** button to resubmit the corrected job to P1.

If the user does not want to immediately re-submit the corrected or fixed job, the user can click the "Save ALL to Current Folder" button. The correction or fix is applied; however, the 'fixed' file remains in the Rejected folder on the server (or computer in a stand-alone environment) until the user is ready to re-submit the job to P1.

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If there are conflicting CRIDs in the submission, the user will be prompted to click the FIX CRID button; afterwhich, the user must also repeat the steps above to change the submitter CRID (i.e. click the CHANGE SUBMITTER CRID button), make the necessary change, and then save and re-submit the file/job.

A *Please Wait…* screen will display as the rejected file is moved to a "…Rejected\History" folder and a corrected copy of the file is moved to the "DAT-MAIL-Export" folder.

The 'Please Wait' screen also provides a valuable reminder to the Client about re-importing the QuickFixed file back into DAT-MAIL to update the original Mail.dat. Doing this avoids issues if/when the job is cancelled, deleted, or otherwise modified in DAT-MAIL at a later date.

If validation errors are present in the file, a screen will display identifying the errors found. Click the **Close** button to close the screen and return to the *Submissions* panel. Depending on the type of errors found, the resubmitted job may or may not fail again, requiring additional attention to corrections.

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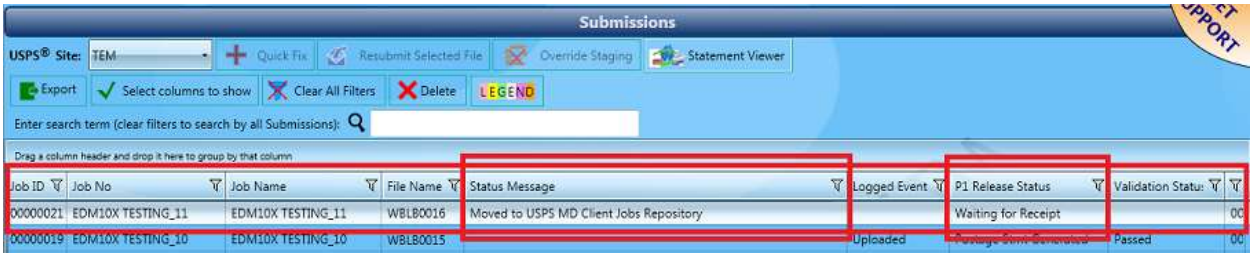
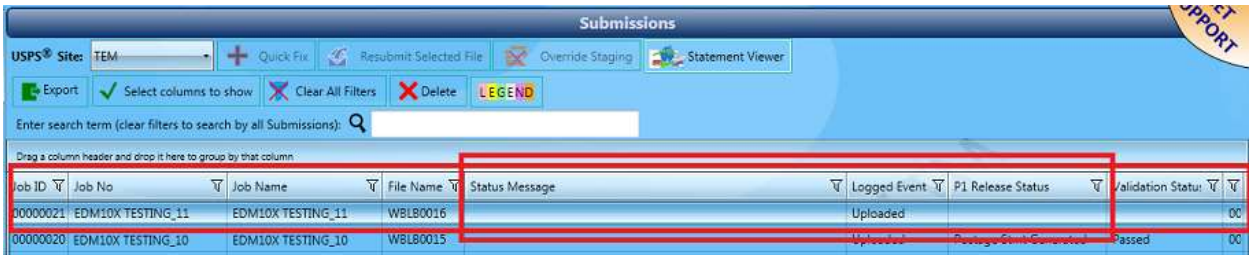
The *Submissions* panel will display. While the job is going through the staging process, the job line in the *Submissions* panel will be yellow in color and the 'Status Message' will read "Waiting for resubmission". Depending on the timing of events, the user may not see this yellow line-item. In all likelihood, the *Submissions* panel will be blue in color and display a 'Status Message' of "Moved to USPS MD Client Jobs Repository" and the 'P1 Release Status' will be "Waiting for Receipt".

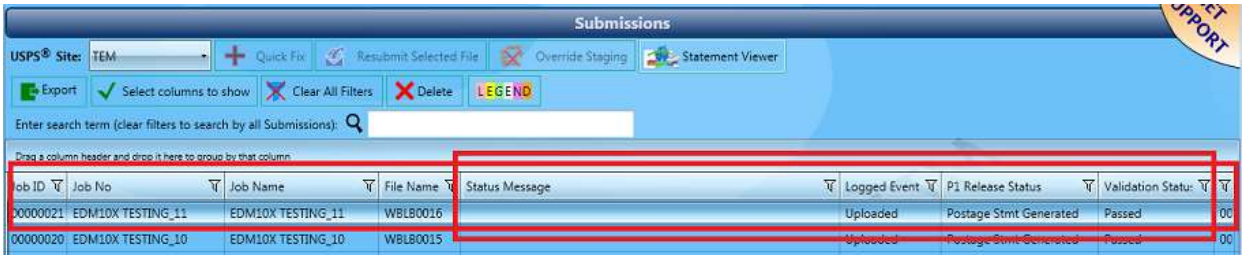


Once the file completes the staging process without incident, the file is moved to the "Exported" folder and the *Submissions* panel once again refreshes. The job line turns green in color and the 'Status Message' changes to "Resubmitted". As with the yellow line item status mentioned above, depending on the timing of events, the user may not see this green line item status. In all likelihood, line item will be blue in color with the 'Status Message' and 'P1 Release Status' fields being blank or empty, and the 'Log Event' displaying a value of "Uploaded".



With the CRID information corrected and assuming the submission passes validation, the file will be moved to the "Successfully" folder. Both log and receipt events will be received, and the Submissions panel will refresh. The job line will remain blue in color, the 'Status Message' field will be blank, the 'Logged Event' field will report a value of "Uploaded", and the 'P1 Release Status' field will report a value of either "Postage Stmt Generated" or "Qual Report Generated" (depending on whether or not statements were generated at the time of upload).

For more information on the color coding that is used for the various status options of submissions, refer to LEGEND in this Guide.



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The file that is moved to the "Successfully" folder is a corrected copy of the original. The original (rejected) file is saved to the "…Rejected\History" folder for that MDR Client. Since only one version of the file was successfully accepted by P1, the corrected copy is still considered an 'Original Release' (i.e. 'Original Release' column will display a value of "True").

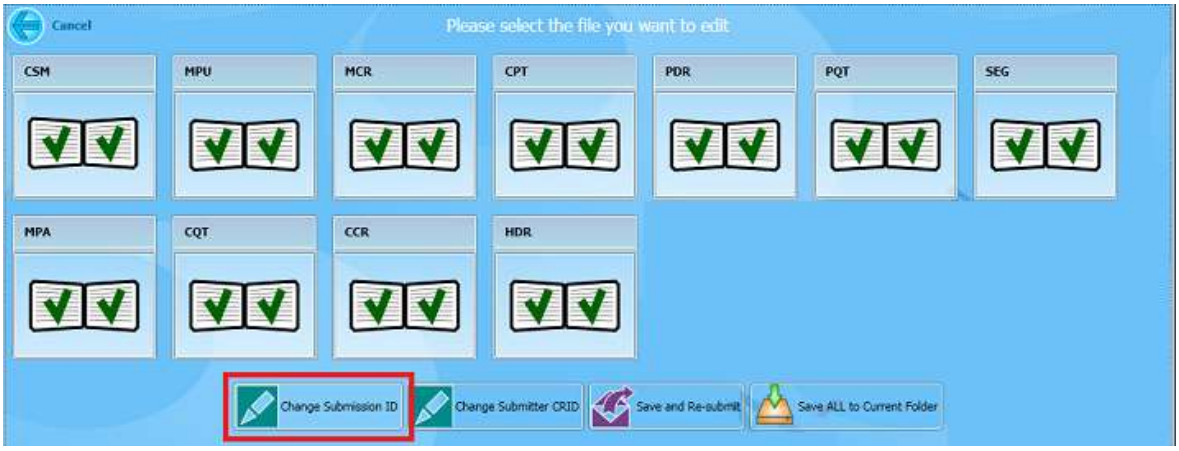
"FILE ALREADY EXISTS" REJECTION

Another issue that can cause a submission to be rejected is if a user submits a duplicate file. For Clients who are using DAT-MAIL, the export to P1 will have to be cancelled within DAT-MAIL and the job re-submitted using a different ID. No action can be taken within PostalWeb Desktop Dashboard to correct the rejected file. The cancelled file can; however, be deleted from PostalWeb Desktop Dashboard by selecting the rejected job in the Submissions panel and clicking the **Delete** button (refer to the Delete section in this Guide for more information).

With the receipt of the rejected log and receipt events, e-mail message notifications would be generated/sent if the notification functions are enabled and configured for rejected files. Refer to the "PostalWeb Connector Installation & User Guide"; specifically, the 'Events Notification' section for more information. The Guide is available via the Support Portal on Window Book's web site at: https://windowbook.na2.teamsupport.com/login/user. Registration and/or login is required.

If a Client is not using DAT-MAIL and a file is rejected due to a "…file already exists" error, the user can select the rejected file, click the **QuickFix** button, and change the submission ID for the file by clicking the **Change Submission ID** button.

Once the Submission ID is updated and the change applied, the user can then resubmit the file to P1 by clicking the **Save and Re-submit** button.



The "Change Submission ID" button only displays in the QuickFix screens for those Clients who are not set up to use Window Book's DAT-MAIL software.

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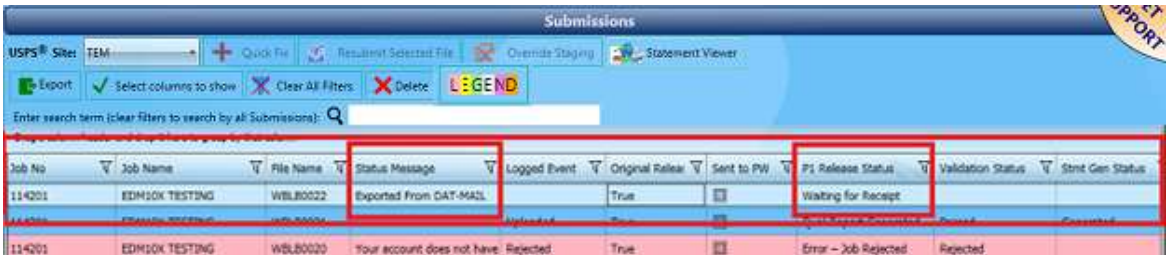
QuickFixes can be performed on all jobs that have been rejected or have failed; however, if the connection with the 'DAT-MAIL-Export' folder (the folder that is specified in the MDR Client configuration in PostalWeb Connector - where files being submitted to P1 are saved to) has been lost for whatever reason, the fix can be applied, but the file will not be able to be resubmitted (i.e. the SAVE AND RESUBMIT button will not be enabled). The user would have to save any fixes by clicking the SAVE ALL TO CURRENT FOLDER button and resubmit the fixed file after the connection to the appropriate 'DAT-MAIL-Export' folder has been re-established.

Failed Submissions

Once a Mail.dat file is placed in the "DAT-MAIL-Export" folder it goes through a Window Book staging process. Once it passes the staging process, the file or submission is moved to the "Exported" folder and begins the P1 validation process.

At this point, the *Submissions* panel refreshes and the job is displayed. The 'Status Message' for the job is "Exported from DAT-MAIL" and the 'P1 Release Status' is "Waiting for Receipt" (refer to File Name "WBLB0022" in the screen image below).



If the submission fails the P1 validation process, the file or submission is moved to the "Failed" folder (in the example being used here, the file path for the folder would be: "\\...WB\MDRClient\TEM\Failed").

When this occurs log and receipt events are generated (not simultaneously), at which point the PostalWeb Desktop Dashboard *Submissions* panel refreshes. The job line turns pink or red in color, so users can easily identify those jobs that have failed. In addition, the 'Status Message' field is updated to include the reason for the failure", the 'Logged Event' field to "Failed Client Validation", and the 'P1 Release Status' field to "Error – Failed Validation" (refer to File Name "WBLB0011" in the screen image below).

For more information on the color coding that is used for the various status options of submissions, refer to LEGEND in this Guide.

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With the receipt of the failed log and receipt events, e-mail and/or text message notifications would be generated/sent if the notification functions are enabled and configured for failed files. . Refer to the "PostalWeb Connector Installation & User Guide"; specifically, the 'Events Notification' section for more information. The Guide is available via the Support Portal on Window Book's web site at: https://windowbook.na2.teamsupport.com/login/user. Registration and/or login is required.

To get further detail about the failure and to fix it, select the failed job and click the **QuickFix** button. A screen will display showing the individual Mail.dat files that make up the failed job (i.e. CQT, MCR, PQT, PBC, CPT, HDR, MPA, SEG, MPU, and CSM). Each Mail.dat file is represented by a thumb-nail image. The individual files that passed validation have green check marks that appear over the file's thumb-nail image. No action is required for these files.

Mail.dat files that contain errors have red X's displayed over their thumb-nail image (in the example displayed in the image below, the "CQT" and "CSM" files contain errors). At the bottom of the screen a table of validation logs will be displayed that provides the actual error that is occurring in the file, along with the file's field name/number that contains the error (in the example displayed in the image below, one of the errors occurs in file/field 'CQT-1008'). Use the scroll bar along the right side of the validation log table to identify all the reported errors.

How errors are displayed differs between Rejected and Failed submissions. For Rejected submissions, QuickFix does not display red X's for the file(s) that contains the error(s), and no validation logs containing the error information are provided at the bottom of the screen (refer to Rejected Submissions for more information).

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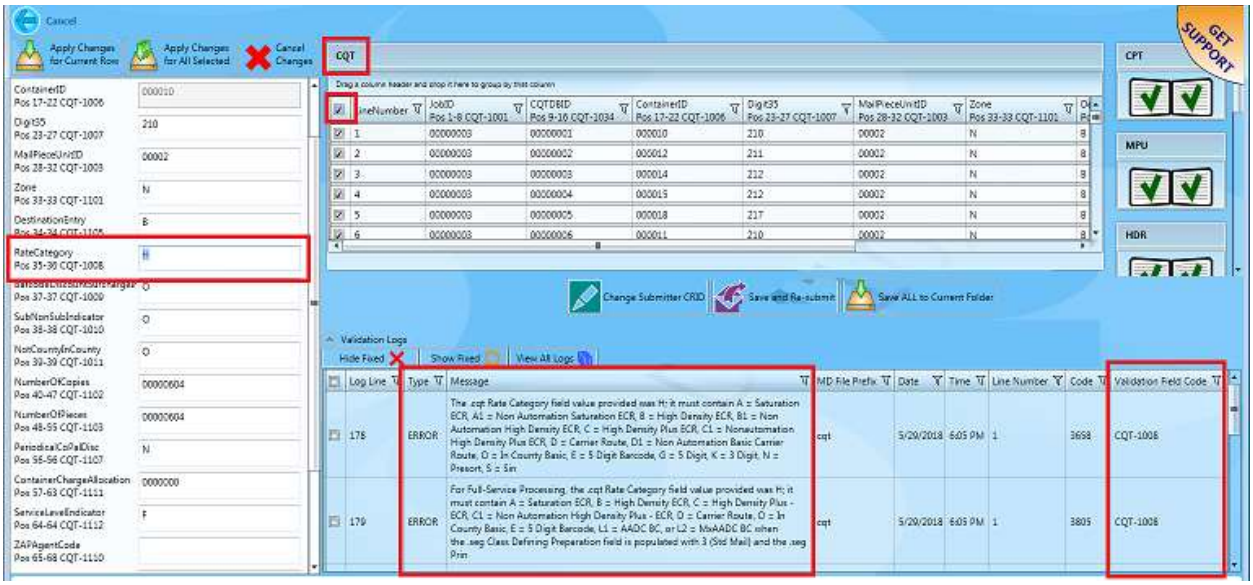
The values displayed in the Validation Field Code column are specific to fields defined in the IDEAlliance Database Standard for Mail.dat files.

To display the *QuickFix Editor* to fix or correct the issue(s) causing and individual file to fail validation, do the following:

1. Click the thumbnail image of the file containing the red 'X' (e.g. the 'CQT' file);
2. The *QuickFix Editor* displays for the selected file and the file's line detail displays, along with the validation log for that file.

   The Validation Logs panel will display only those logs for the file that is being viewed; however, the user can view all the log files for the entire job by clicking the **View All Logs** button;

   Identify the field code that contains the error (in the example being used here field code 1008 contains the issue);
3. If not already checked, select (check) the box located to the left of the corresponding line(s) that contain the issue. If all the rows contain the issue, select or check the box in the table header row to automatically select all the rows;
4. Locate the field code containing the issue in the white editor panel located at the left by scrolling down through the list of fields (e.g. field code 1008);



   Based on the error detailed in the Validation Log, enter the correct value in the field (i.e. field code 1008);

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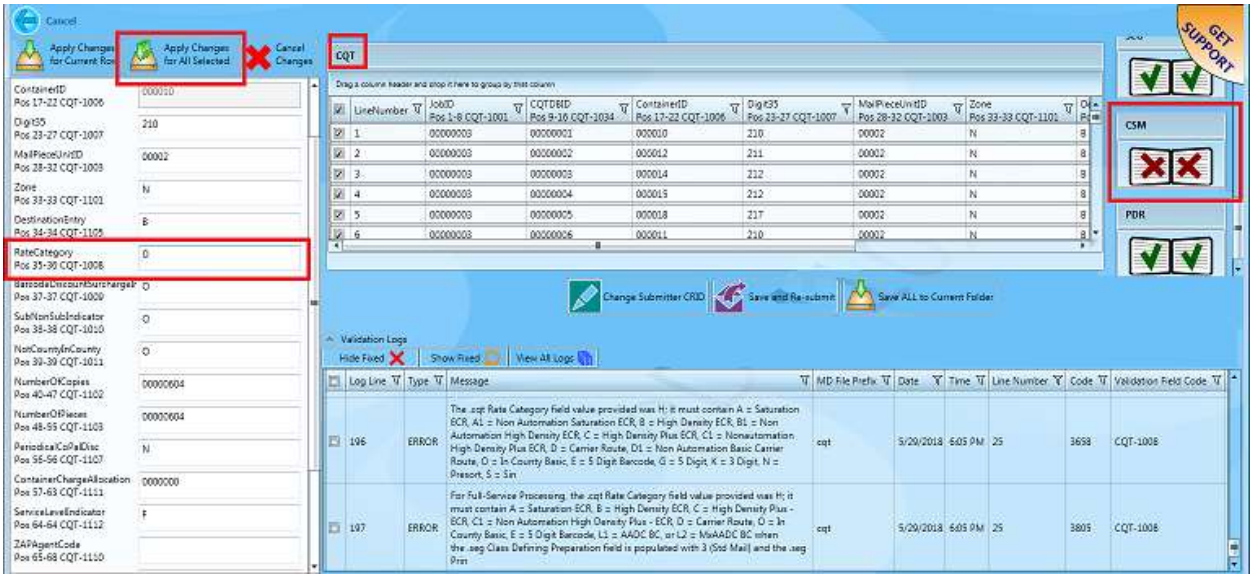
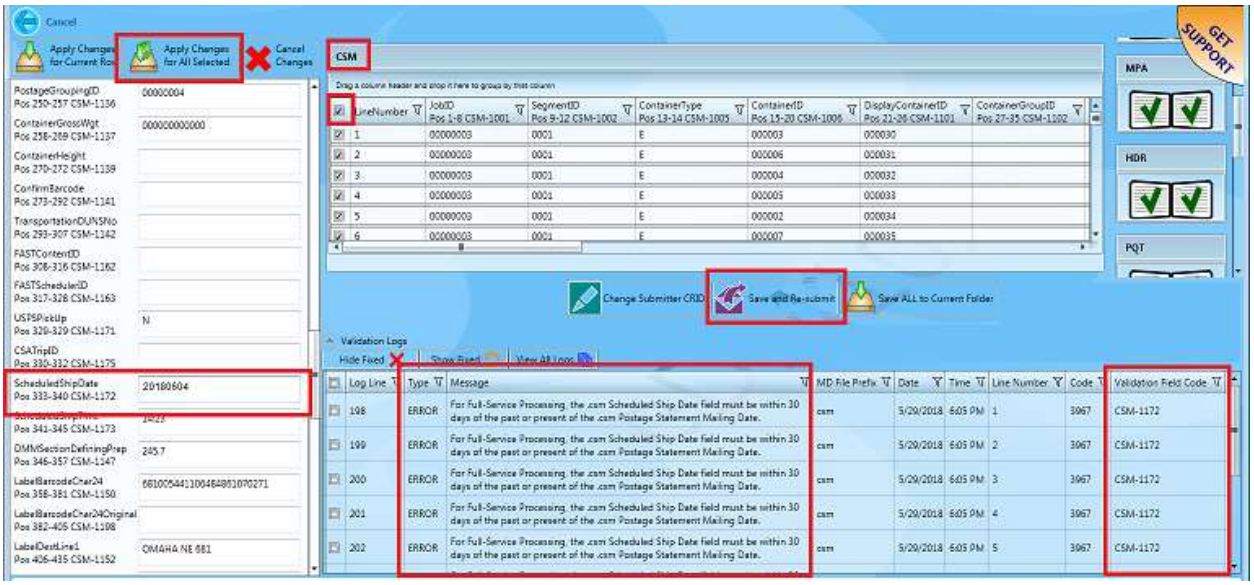
5. At this point, the user can apply the changes to the current row, apply the changes for all the selected rows, or cancel all the changes made by clicking the appropriate button located at the top of the editor panel. In this example, the **Apply Changes for ALL Selected** button is clicked;



Next, the user would need to select another file containing errors (if one exists), by clicking on the file's thumb-nail image located at the right (if necessary, use the scroll bar to locate and click the thumb-nail image of a file with a red 'X'). In the example being used here, the CSM file also contains errors that need to be fixed;

Perform the same steps for identifying and correcting the issues or errors as explained above, and applying the changes;



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6. When all the files containing issues have been fixed or corrected, the user can 'Save All to Current Folder'(corrected file is saved in the 'Failed' folder but is not resubmitted to P1) or 'Save and Re-submit' the file. In the example being used here, the **Save and Re-submit** button is clicked (see image above);

QuickFixes can be performed on all jobs that have failed or been rejected; however, if the connection with the 'DAT-MAIL-Export' folder (the folder that is specified in the MDR Client configuration in PostalWeb Connector - where files being submitted to P1 are saved to) has been lost for whatever reason, the fix can be applied, but the file will not be able to be resubmitted (i.e. the SAVE AND RESUBMIT button will not be enabled). The user would have to save any fixes by clicking the SAVE ALL TO CURRENT FOLDER button and resubmit the fixed file after the connection to the appropriate 'DAT-MAIL-Explort' folder has been re-established.

7. A *Please Wait…* screen will display as the failed file is moved to a "…Failed\History" folder and a corrected copy of the file is moved to the "DAT-MAIL-Export" folder;

The 'Please Wait' screen also provides a valuable reminder to the Client about re-importing the QuickFixed file back into DAT-MAIL so as to update the original Mail.dat. Doing this avoids issues if/when the job is cancelled, deleted, or otherwise modified in DAT-MAIL at a later date.

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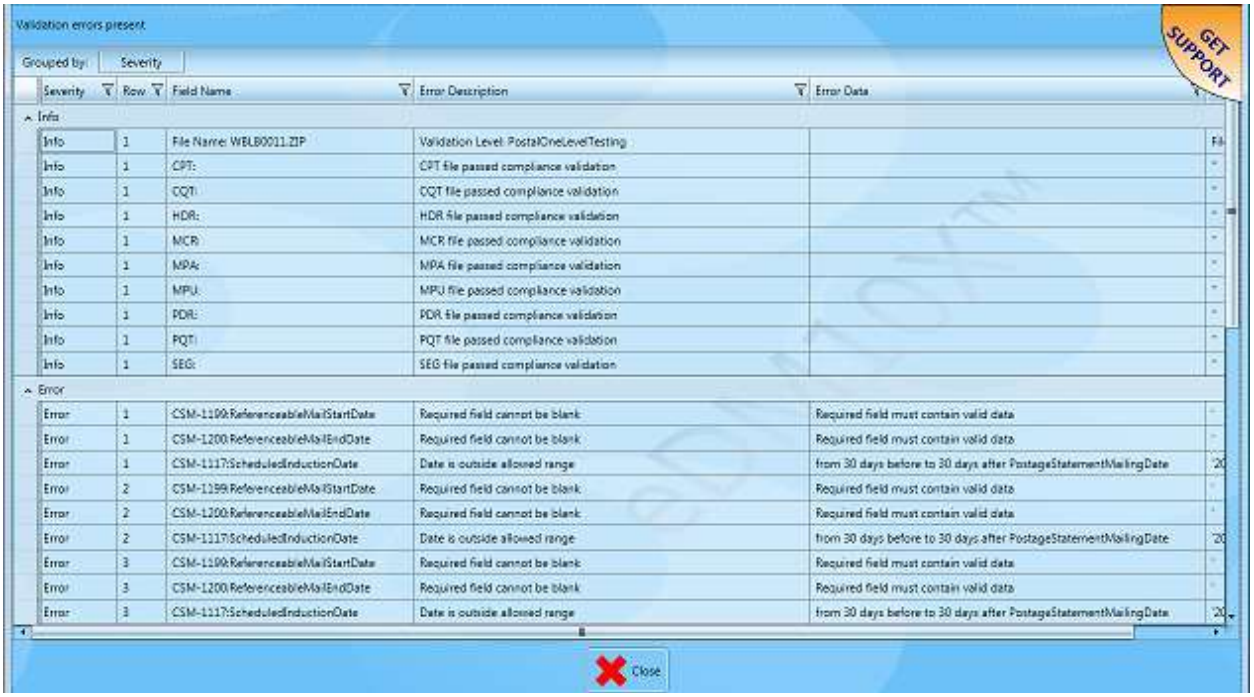
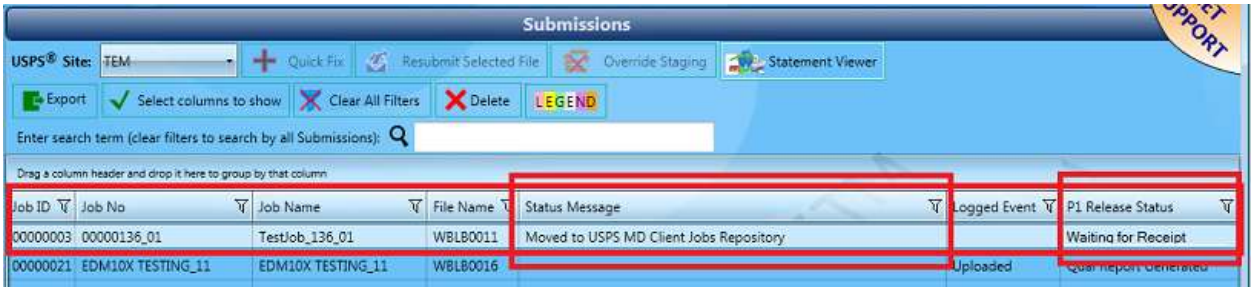
8. If validation errors are present in the file, a screen will display identifying the errors found. Click the **Close** button to close the screen and return to the *Submissions* panel. Depending on the type of errors found, the resubmitted job may or may not fail again, requiring additional attention to corrections;



9. If no further validation errors are identified after the **Save and Resubmit** button is clicked in QuickFix, the *Submissions* panel will display. While the job is going through the staging process, the job line in the *Submissions* panel will be yellow in color and the 'Status Message' will read "Waiting for resubmission". Depending on the timing of events, the user may not see this yellow line-item. In all likelihood, the *Submissions* panel will be blue in color and display a 'Status Message' of "Moved to USPS MD Client Jobs Repository" and the 'P1 Release Status' will be "Waiting for Receipt".

For more information on the color coding that is used for the various status options of submissions, refer to LEGEND in this Guide.



Once the file completes the staging process without incident, the file is moved to the "Exported" folder and the *Submissions* panel once again refreshes. The job line turns green in color and the

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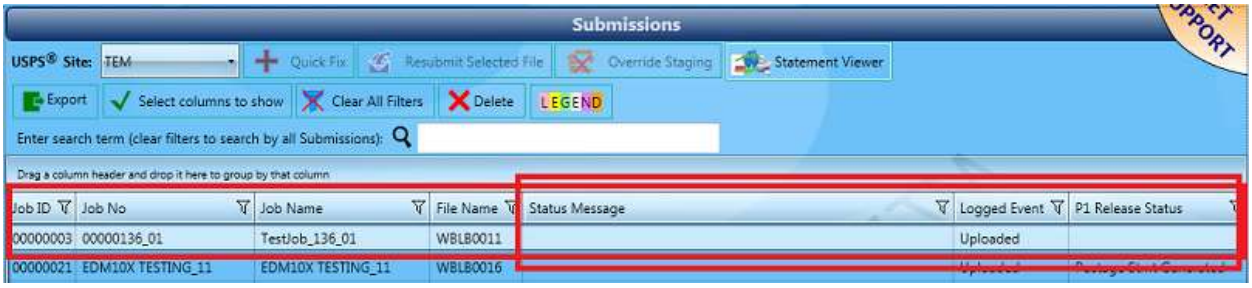
'Status Message' changes to "Resubmitted". As with the yellow line item status mentioned above, depending on the timing of events, the user may not see this green line item status. In all likelihood, line item will be blue in color with the 'Status Message' and 'P1 Release Status' fields being blank or empty, and the 'Log Event' displaying a value of "Uploaded";



With the necessary information corrected and assuming the submission passes validation, the file will be moved to the "Successfully" folder. Both log and receipt events will be received, and the Submissions panel will refresh. The 'Status Message' field will be blank, the 'Logged Event' field will report a value of "Uploaded", and the 'P1 Release Status' field will report a status of either "Postage Stmt Generated" or "Qual Report Generated" (depending on whether statements were generated at the time of upload)..

The file that is moved to the "Successfully" folder is a corrected copy of the original. The original (failed) file is saved to the "…Failed\History" folder for that MDR Client. Since only one version of the file was successfully accepted by P1, the corrected copy is still considered an 'Original Release' (refer to the screen image above)..

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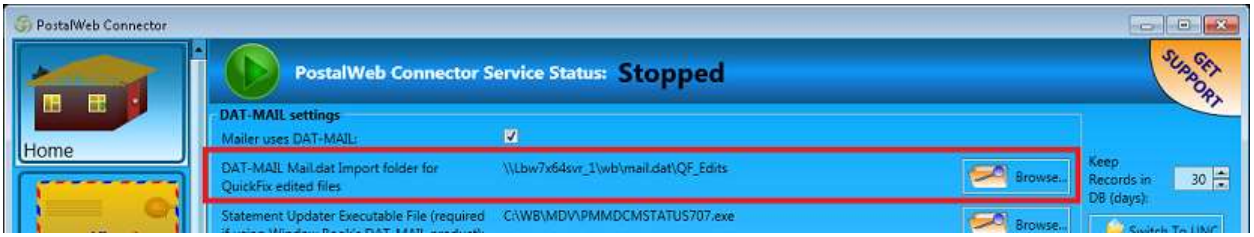
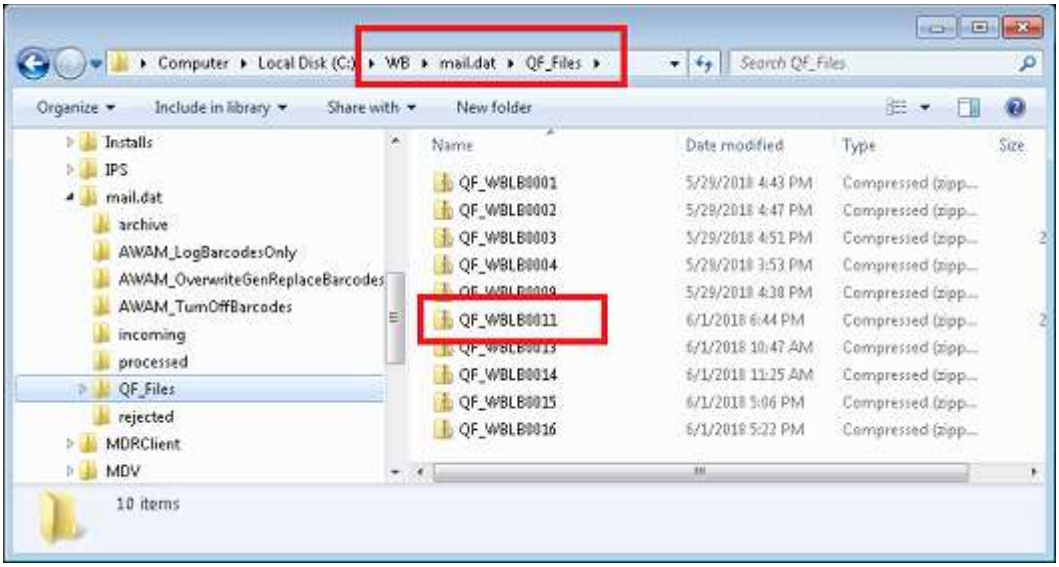
Importing QuickFix Files Back Into DAT-MAIL

Submissions or files that were 'fixed' using QuickFix and that passed validation after being re-submitted to P1, can be imported back into DAT-MAIL as a new job, or be imported so that it will update/correct the original file.

Within PostalWeb Connector, part of the setup process is to create/specify a directory or folder where the 'fixed' files will be saved to. In the example being used here, this directory or folder was created under the '\\...WB\Mail.dat' folder and was called "QF_Files". Files that have been corrected or 'fixed' using QuickFix are saved to this folder using the original file name with a "QF_" prefix attached to it (e.g. "WBLB0011.zip" becomes "QF_WBLB0011.zip").



if PostalWeb Desktop Dashboard and PostalWeb Connector were being used in server with workstation(s) environment, using a UNC path for the directory where the QuickFixed files are saved would be required (as shown in the image above).



QuickFix edited files can be imported back into DAT-MAIL one of three ways: 1) Using AWAM; 2) From DAT-MAIL's main screen by selecting the 'File' menu and then the 'New Mail.dat Import' menu option; and 3) Manually, one at a time using the QuickFix Processor.

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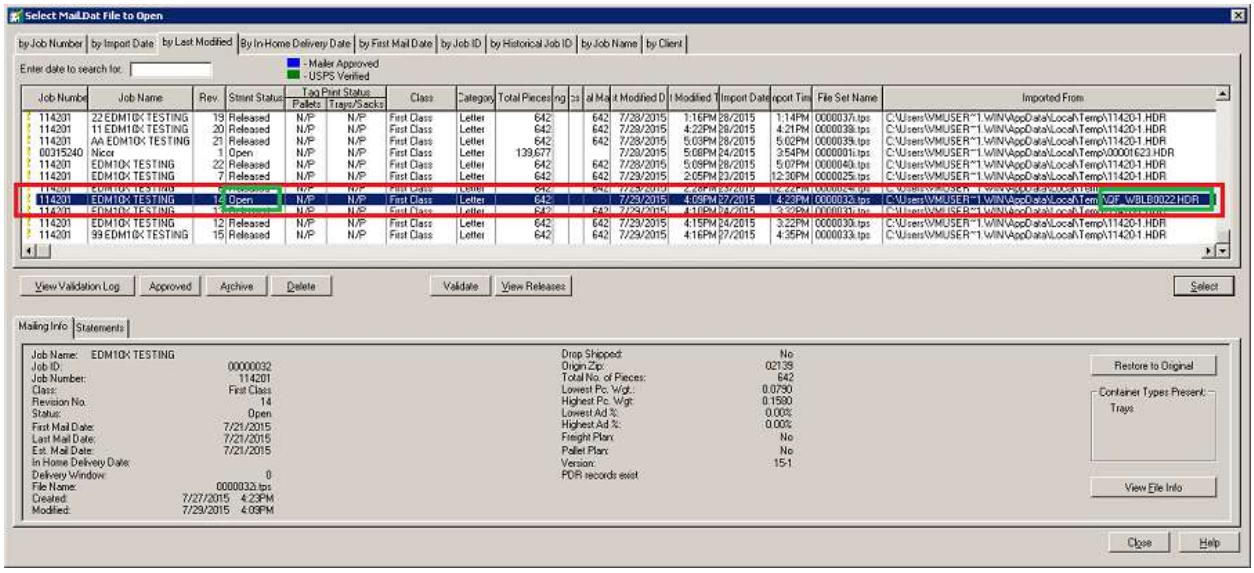
Using methods 1, and 2 results in the QuickFix edited files being imported into DAT-MAIL as new jobs. The new job's file name will include a "QF_" prefix so as to be able to easily identify it as a previously released job.



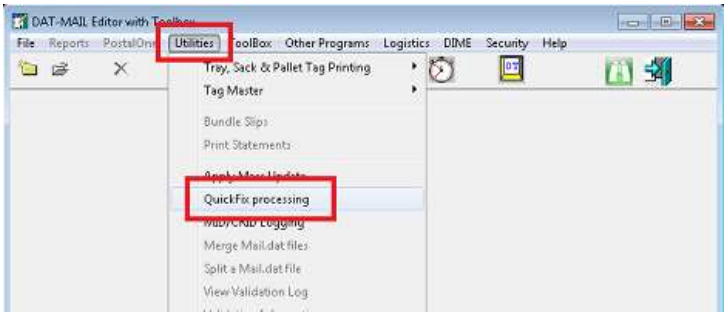
Method 3 allows the user to import a QuickFix edited file and update the original Mail.dat file with it. Whatever caused the original file to fail or be rejected initially will be corrected.

For original files that are being updated, the job or file data will remain unchanged. No "QF_" prefix will be used to signify the Mail.dat file has been updated/corrected.

If a user wishes to update the original file in DAT-MAIL with the corrected or 'fixed' file (method 3), they would need to perform the following:

In the example being used here, QF_WBLB0016.zip is being imported back into DAT-MAIL. The original file or submission had been rejected due to a bad eDoc Sender CRID (i.e. "9999999") in the SEG file. The file was 'fixed' using QuickFix – the eDoc Sender CRID field in the SEG file was updated with a value of "2442173".

1. Launch DAT-MAIL. From DAT-MAIL's main screen, select the 'Utilities' menu and then select the 'QuickFix processing ' menu option;



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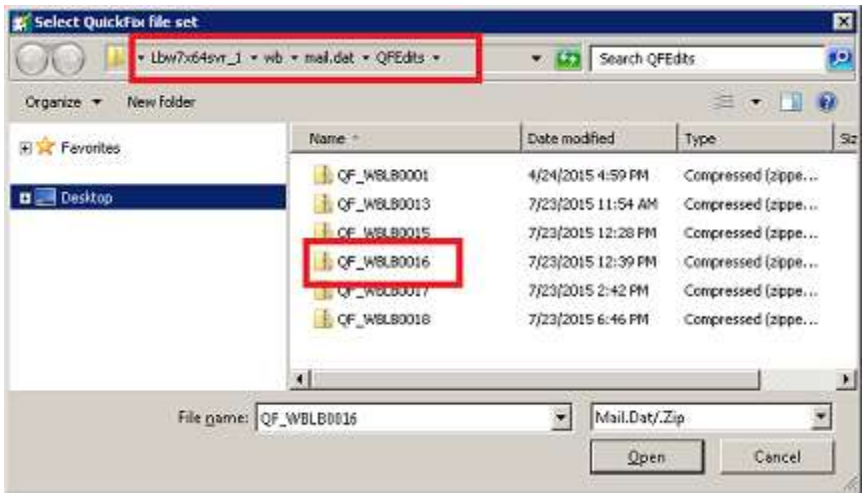
2. The *QuickFix processor* screen will display. Click the Select **QuickFix File** button;

3. A *Select a QuickFix file set* screen will display. The screen automatically displays the contents of the 'QFEdits' folder specified within PostalWeb Connector (refer to the PostalWeb Connector screen image located at the beginning of this section above);



4. Select the QuickFix file to be imported into DAT-MAIL. In the example being used here, "QF_WBLB0016.zip" is selected. Click the **Open** button;

5. The *Select QuickFix file set* screen closes and the *QuickFix processor* screen updates to include the selected QuickFix file. Click the **OK** button to begin the import process (clicking the **Cancel** button cancels or stops the import process);

6. When the import is complete, an *Information* dialog will display confirming the file processed successfully. Click the **OK** button to resolve the dialog;

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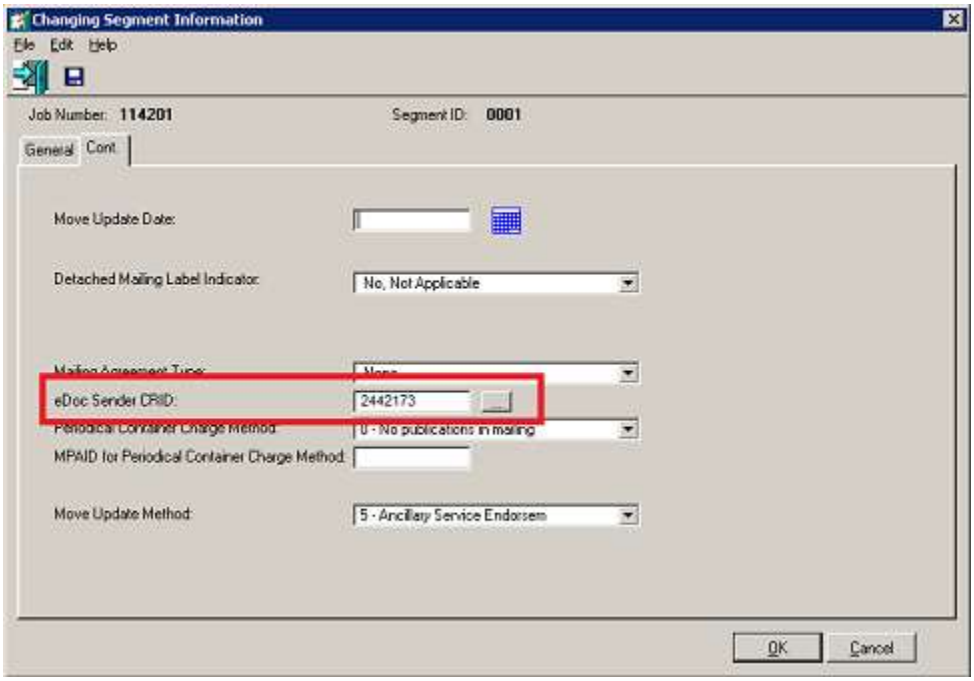
7. On the server (or computer in a single installation environment), the file is moved from the '\\...WB\mail.dat\QFEdits' folder to the ; '\\...WB\mail.dat\Processed' folder. A copy of the original, rejected file remains in the '\\...WB\MDRClient\TEM\Rejected\History' folder;

8. In DAT-MAIL, the newly updated file now contains the correct eDoc Sender CRID in the SEG file;



The update/correction of the original Mail.dat file in DAT-MAIL using the QuickFix Processor is complete!

REPORTING

The reporting function in PostalWeb Desktop Dashboard assists Clients in understanding how long it takes to perform various *PostalOne!* submission functions, such as:

- End-to-end processing time for all functions (i.e. Start, End, and Duration);
- Validation Time (i.e. Start, End, and Duration);
- Upload Time (i.e. Start, End, and Duration); and
- Attempt Time (i.e. Start, End, and Duration).

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The report itself provides data that can provide insight as to why it takes as long as it does to process jobs. Process times can be related to validation, the actual upload, and/or the processing itself. Variables that can impact these are: job type (regular or MLOCR), number of pieces, number of trays and pallets, size of the PQT and CQT files, and/or the time of day the processing was attempted. Once a report is generated, the resulting data can be exported to Microsoft Excel, allowing Clients to use formulas to calculate such things as average duration. By determining a baseline and comparing it against certain times of the day (upload may slow during certain times), Clients will be able to develop an accurate set of expectations around *PostalOne!* processing times; an advantage for those Clients who submit a large number of jobs.

For navigation and/or on-screen data manipulation information and instructions, refer to the Component Identification section in this manual, specifically the Report Button section.

To generate a report based on existing job submissions, do the following:

1. From PostalWeb Desktop Dashboard's main or home screen, click the **Report** button;
2. The *Report* screen will display. Select the MDR Client configuration to display the corresponding jobs for (i.e. PROD, TEM, PREPROD, or CAT);
3. Select the job(s) to generate report data for and click the **Create Report** button;

4. The resulting report data will display, after which the corresponding graphical representation will build and also display;

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5. To export the displayed report data from PostalWeb Desktop Dashboard, click the **Export** button and select the preferred file type for the data to be exported as (i.e. Excel, Word, or CSV);

6. Specify the file save-to location and enter a file name. Click the **Save** button (or click the **Cancel** button to quit the export process);

7. After the export is complete, click the back-arrow located in the top, left corner of the page to return to PostalWeb Desktop Dashboard's main or home menu, or click the **Return** button to display the main *Reports* screen.

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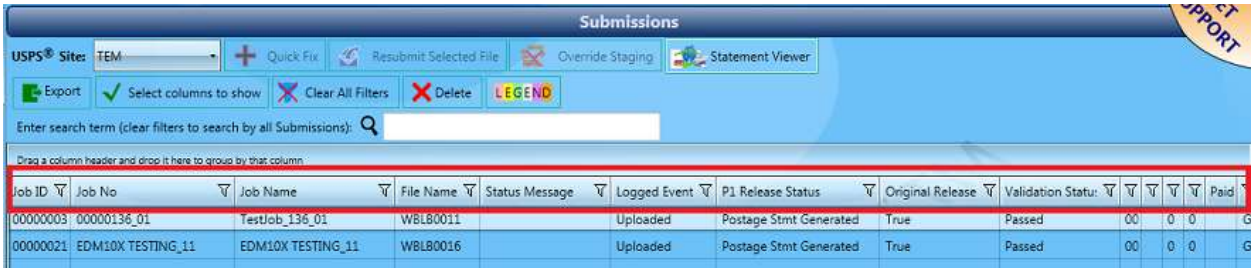
APPENDIX 1

SUBMISSIONS PANEL FIELDS



The following fields are available in columnar format on the *Submissions* panel in PostalWeb Desktop Dashboard (not listed in any specific order):

Submissions Panel Fields	
• PSID (postage statement ID)	• Stmt Gen Status
• Job ID	• Accepted Status
• Job No	• Deleted Status
• Job Name	• Finalized Status
• Mail.dat Version	• Rejected Status
• File Name	• DBInsert Status
• Status Date	• Canceled Status
• Status Time	• PS Mailing Date (Postage Statement Mailing Date)
• Status Message	• Full-Service Indicator (possible values are: F = Full Service; M = Mixed Full Service; and blank = no full service)
• Logged Event	• Job Status
• Original Release	• Resubmission Attempt

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Submissions Panel Fields

- Special Type (denotes whether a statement has been Cancelled or a job Deleted – submissions that contain either of these values will not be moved to pre-staging due to their status))
- Sent to PW
- ClaSysID
- Mail Owner Name
- P1 Release Status
- % pieces paid for
- # pieces paid for
- Paid
- Validation Status
- PBC Count
- PDR Count
- CQT Count
- PQT Count
- Historical Hdr Sequence Number
- e-Doc Sender CRID
- Workflow Status
- Warning Message

Not all columns or fields can be displayed in a single view on the screen; therefore, users will have to scroll right or left to view columns, if all are displayed.

Depending on a Client's needs, columns can be manipulated in a variety of ways to make viewing data easier. Columns can be hidden, moved, resized, and grouped. Refer to Submissions Panel in this document for more information.

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