




WindowBook
Automating Information. Growing Prosperity.



for Mail Service Providers

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 information and screen images	Revision	Throughout Guide	Replaced 'wbiadmin@windowbook.com' with 'do-not-reply@windowbook.com'. The "wbiadmin..." e-mail address is no longer used by PostalWeb. Please make sure to white-list the new 'do-not-reply@windowbook.com' address.

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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.



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

PURPOSE

The purpose of this Guide is to provide information on how to use PostalWeb®. This Guide assumes the client-specific PostalWeb site has already been created, and communication between it and the required Window Book software has been already established (if necessary).

For instructions on how to create and configure a new, client-specific PostalWeb site, please refer to the *PostalWeb for Mail Service Providers Setup Guide*, which is available on the Window Book web site at: <https://www.windowbook.com/Support/UserGuides>. Registration and/or login is required.

INTRODUCTION

PostalWeb is a web-based service from Window Book that gives Mail Service Providers (MSPs) a unique view of their successful and failed *PostalOne!*® submissions for each of their CRID-specific Locations.

In addition, MSPs can subscribe to or sign up for the automated delivery of their *PostalOne!*-generated documents in PDF and/or XML file formats via e-mail or a file transfer to a server or computer. A value added benefit of receiving these documents in XML format is that they are easily imported into accounting applications.

PostalWeb's 'EDOCS Reporting' module allows user-configurable reports to be easily generated in either PDF or Excel® formats. Reports are based on the postage statements retrieved from *PostalOne!*. Please refer to the [Reporting](#) section for more information.



Contact a Window Book Client Service Representative for information on obtaining access to the PostalWeb 'EDOCS Reporting' module. [Click here](#) for contact information.

PostalWeb mobile apps are also available. Please see the [PostalWeb Apps for Mobile Phones](#) section for more information.

DISPLAY/BROWSER REQUIREMENTS

SCREEN RESOLUTION

- Minimum 1280 x 800 or higher.

WINDOWS® REQUIREMENTS

- **Browser:** The latest versions of Internet Explorer®, Firefox®, Google Chrome™, or any modern browser available for supported operating systems, including the latest mobile browsers.

APPLE® MAC® REQUIREMENTS

- **Browser:** Latest versions of Chrome®, Firefox® or Safari® (including the mobile browser Safari iOS 8).

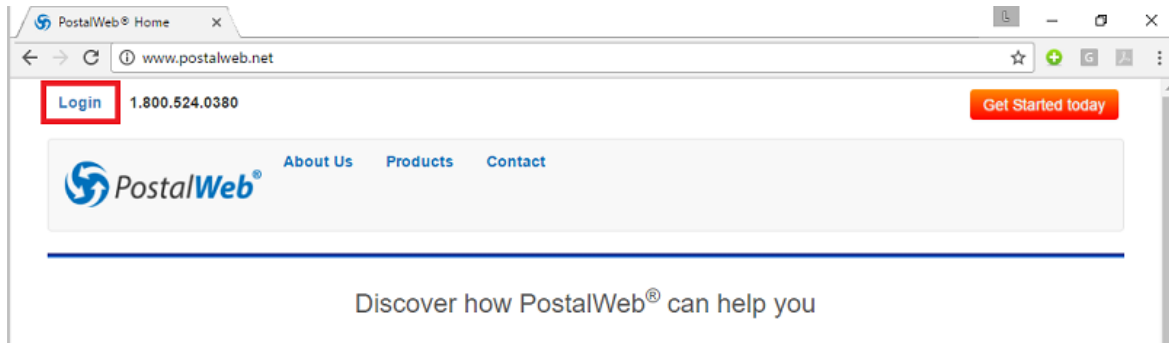


Users who wish to view PDF documents must have an appropriate PDF reader installed on their computer and/or as a browser plug-in.

LOGGING IN TO POSTALWEB

To access their company-specific PostalWeb site, an MSP must have their login credentials (i.e. User Name and Password). This information is obtained when an employee is invited to participate in PostalWeb and they successfully complete the 'Invitation Account Setup'.

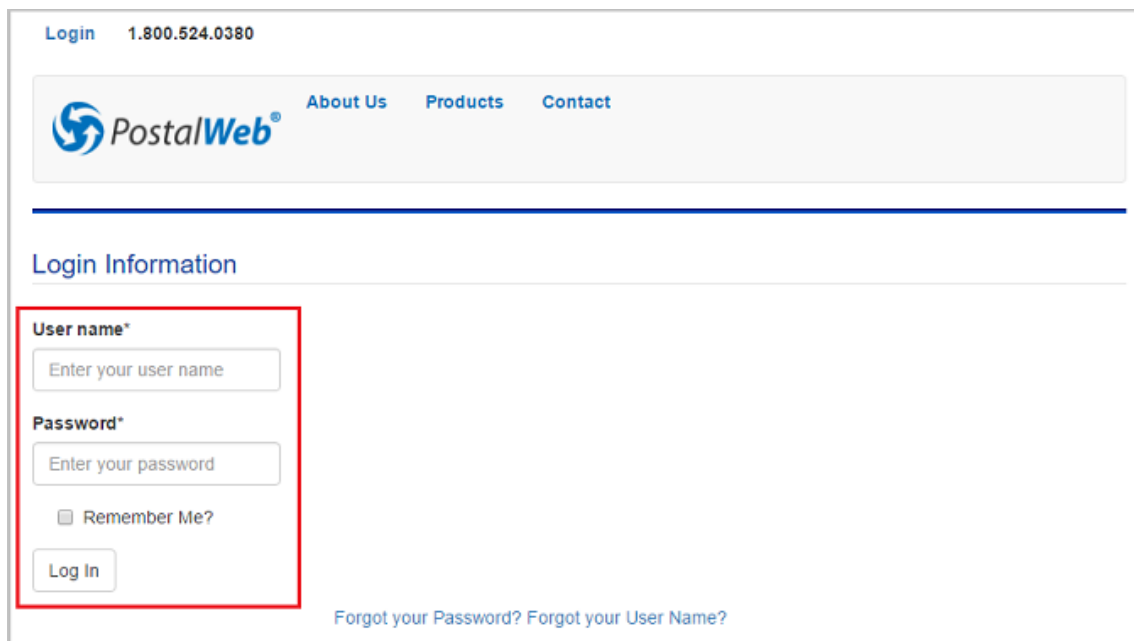
To log in to the PostalWeb site, open a web browser and navigate to www.postalweb.net. Click the 'Login' link.



 **Asterisks indicate required fields throughout the PostalWeb site.**


The *Login Information* screen will display. Enter the user name and password (the user name is not case sensitive).

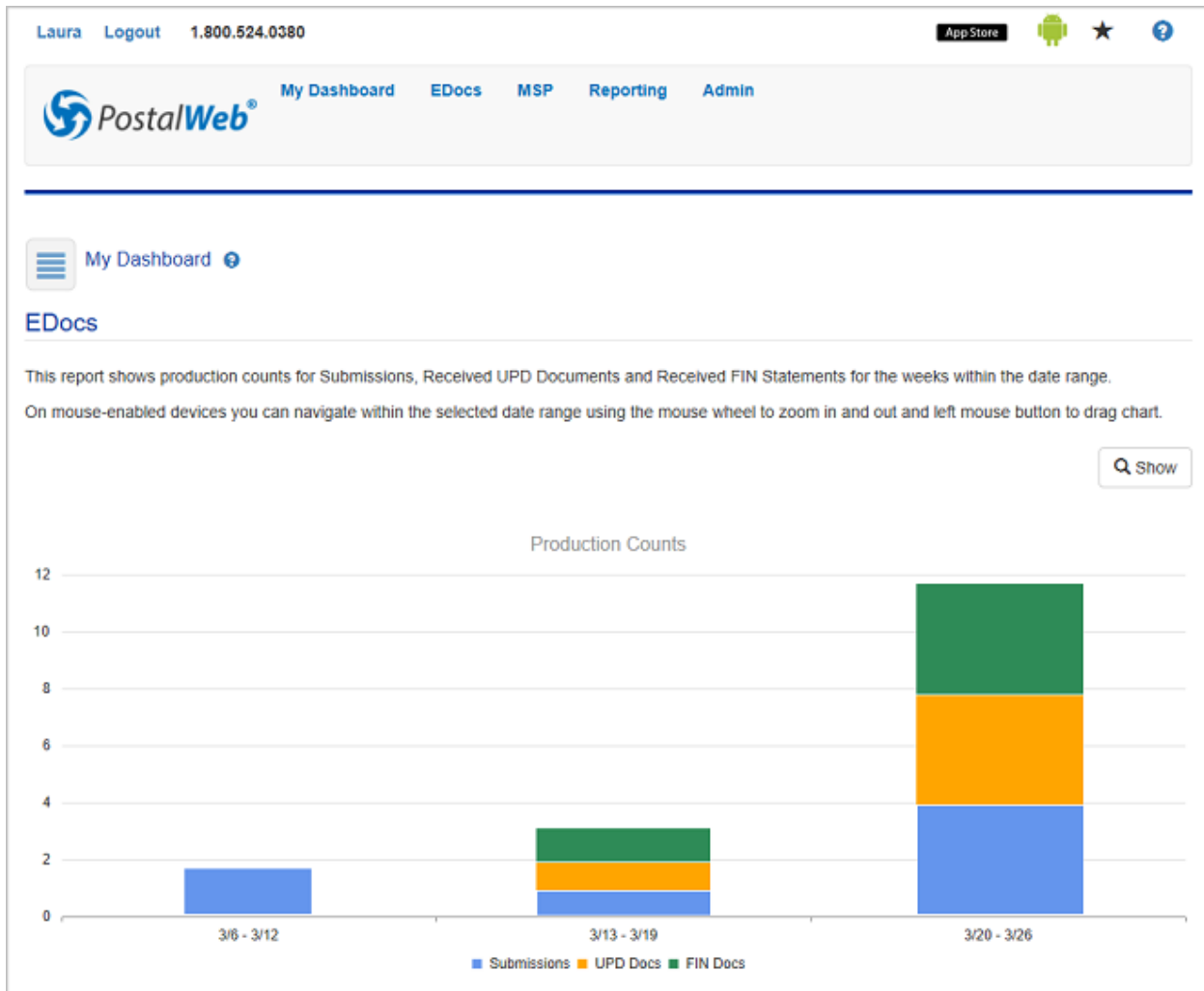
OPTIONAL: Select (click) the 'Remember Me?' checkbox to be able to be logged back in to the PostalWeb site automatically without having to re-enter the login credentials. Click the **Log in** button;



Logging In And Credentials

If the credentials used to log in are accepted, either the *My Dashboard* screen will display or the screen designated as the 'Start Page' (refer to [Setting The Start Page Via The Star Icon](#) for more information);

 **The options that display in the menu bar at the top of the screen are dependent upon the Role assigned to the user logging in (refer to [LAYOUT FUNDAMENTALS](#) for more information).**



If after clicking the **Log In** button, an error message appears to the effect that 'The user name or password provided is incorrect', carefully re-type the user name and password and click the **Log In** button again.



Seven consecutive failed logins due to an incorrect password (but using a correct user name) will cause the account associated with the user name to become locked for 30 minutes. After at least 30 minutes have passed, attempt the login again.

Login Information

Please check the Errors below.

- Your account is locked out. Please wait 30 minutes and try again

User name*

Password*

Remember Me?

If the error message repeats, use the [Forgot your Password?](#) and/or the [Forgot your User Name?](#) links provided.

Login Information

Please check the Errors below.

- The user name or password provided is incorrect.

User name*


✕

Password*

Remember Me?

[Forgot your Password?](#) [Forgot your User Name?](#)

If after clicking the **Log In** button, a page displays to the effect that the user's access has been denied, the user has likely been de-activated. In this case, the user must contact a PostalWeb user assigned an 'administrator' role to have the account activated.



Oops! Access to the resource you were looking for has been denied :-)

We're sorry, but an access denied event has occurred.

Your organization's Administrator may have disabled your account.
Please check with your Administrator before contacting Support.

[Try Going Back to the Previous Page](#)

If this condition continues, please use the support options listed below.

Customer service and support YOUR way!

We understand that customer service can be very personal in how each individual person prefers to engage with us. Accordingly, we offer access to technical support via various methods:

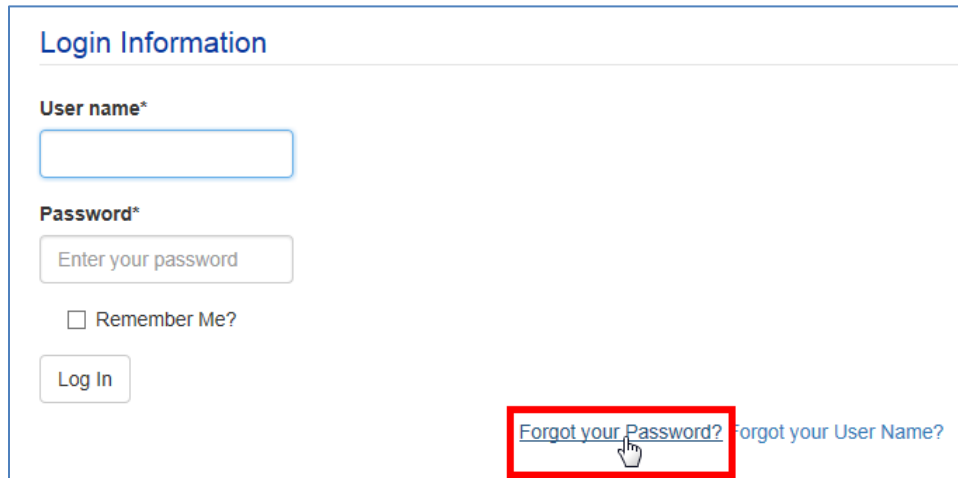
- Visit our [Support portal](#)
- Email us at TechSupport@windowbook.com
- Call us at **800-477-3602** (available Monday to Friday 8:00AM - 6:00PM EDT)
- When submitting your technical support issue, make sure to specify which software product you are having an issue with (PostalWeb®, eDM10X™, MDSM, etc.), which version number of the software you are using, and a detailed description of the issue you are having. Also include any applicable Mail.dat files, shipping files, PDF's of postage statements, reports impacted, and screen shots of any error messages you are getting. Providing this information in advance will result in the fastest resolution to your issue.

If other errors persist or the log in process appears to stall, see [APPENDIX 2 - TROUBLESHOOTING](#).

FORGOT YOUR PASSWORD?

 **The user must already have an existing account with the PostalWeb site to use this process.**

If a user has forgotten their password, they can click the 'Forgot your Password?' link provided on the *Login Information* page.



Login Information

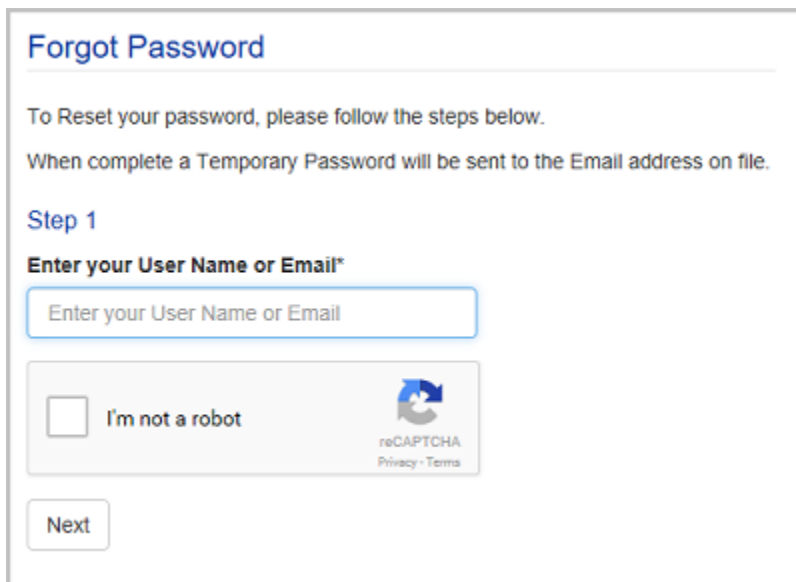
User name*

Password*

Remember Me?

[Forgot your Password?](#) [forgot your User Name?](#)

Step 1 in the process to reset the user's password, will display. To verify the identity of the person attempting to reset their password, the user must first enter their 'User Name', which is not case sensitive, or their email address. If entering an email address, it must be the same email address listed in the 'Member Profile' for the account.




Forgot Password

To Reset your password, please follow the steps below.
When complete a Temporary Password will be sent to the Email address on file.

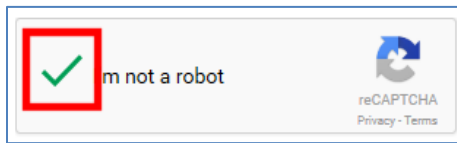
Step 1

Enter your User Name or Email*

I'm not a robot  reCAPTCHA
Privacy - Terms


Logging In And Credentials

Complete the 'I'm not a robot' widget by clicking in the white square and selecting the required pictures or entering the required text. The 'I'm not a robot' has been successfully completed when a green check mark appears in place of the box.



 **If the 'I'm not a robot' does not appear in the browser, consult [APPENDIX 2 - TROUBLESHOOTING](#).**

After entering the necessary information, click the **Next** button to continue.

 **If there is no account on file with the entered User Name or email address, an error will be displayed and the user will have to restart the process.**

Step 2 will display. The user must enter the answer to the 'Security Question'. The answer entered must be the same answer entered to the same question that was selected/answered as part of the 'Invitation Account Setup' form required when initially signing up to access the PostalWeb system. The answer is not case sensitive.

Forgot Password

To Reset your password, please follow the steps below.


When complete a Temporary Password will be sent to the Email address on file.

Step 2

Your Security Question Is: **Mothers maiden name?**

Provide the answer to your security question*

Click the **Reset Password** button. An email containing a temporary, system-generated password will be sent to the address listed in the 'Member Profile'.

 **If the answer entered is incorrect an error will be displayed and the user will have to re-start the process.**

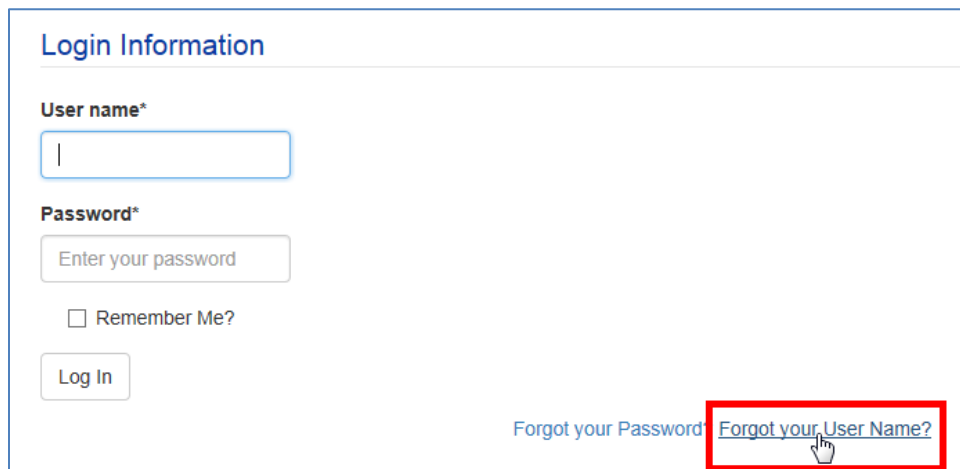
After receiving the email and retrieving the newly created password, it can be used immediately to access the PostalWeb site. It is recommended to change the temporary password as soon as possible.

FORGOT YOUR USER NAME?

i *The user must already have an existing account with the PostalWeb site to use this process.*

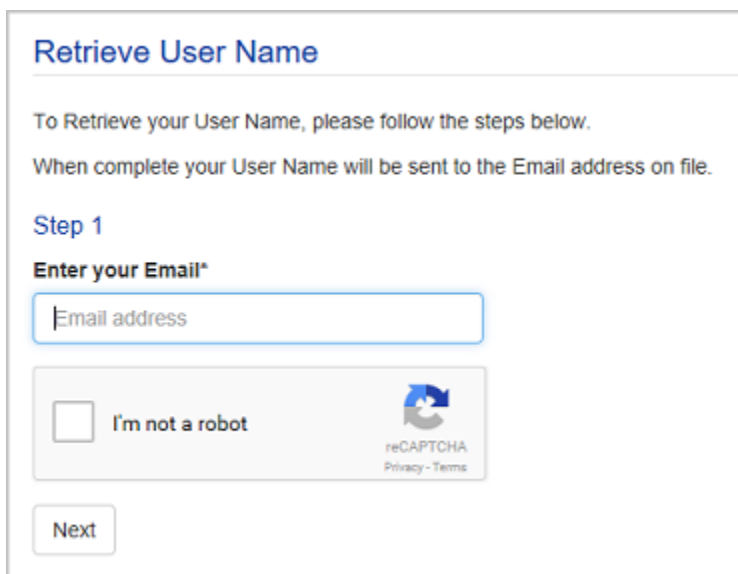
If a user is unable to remember their user name for logging into their company's PostalWeb site, they can click the link 'Forgot your User Name?' provided on the login page to retrieve it.

i *The existing 'User Name' will be retrieved, not changed.*



The screenshot shows the 'Login Information' section of the PostalWeb interface. It includes a 'User name*' field, a 'Password*' field with the placeholder 'Enter your password', a 'Remember Me?' checkbox, and a 'Log In' button. At the bottom right, there are two links: 'Forgot your Password' and 'Forgot your User Name?'. The 'Forgot your User Name?' link is highlighted with a red rectangular box, and a mouse cursor is pointing at it.

Step 1 in the process to retrieve the user's 'User Name', will display. Enter the 'Email Address' that is listed in the 'Member Profile' within PostalWeb.

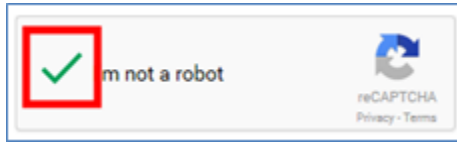


The screenshot shows the 'Retrieve User Name' page. It contains the following elements: a title 'Retrieve User Name', a heading 'Step 1', and a sub-heading 'Enter your Email*'. Below the sub-heading is an 'Email address' input field. Underneath the input field is a checkbox labeled 'I'm not a robot' next to a reCAPTCHA widget. At the bottom of the form is a 'Next' button.

Complete the 'I'm not a robot' widget by clicking in the white square and selecting the required pictures or entering the required text.


Logging In And Credentials

The 'I'm not a robot' has been successfully completed when a green check mark appears in place of the box.



 **If the 'I'm not a robot' does not appear in the browser, consult [APPENDIX 2 - TROUBLESHOOTING](#).**

Click the **Next** button to continue.

 **If there is no account on file with the entered User Name or email address, an error will be displayed and the user will have to restart the process.**

Step 2 of the retrieval process will display. The user must enter the answer to the 'Security Question'. The answer entered must be the same answer entered to the same question that was selected/answered as part of the 'Invitation Account Setup' form required when initially signing up to access the PostalWeb system. The answer is not case sensitive.

Retrieve User Name

To Retrieve your User Name, please follow the steps below.


When complete your User Name will be sent to the Email address on file.

Step 2

Your Security Question Is: **Mothers maiden name?**

Provide the answer to your security question*

Click the **Retrieve User Name** button. An email will be sent to the email address listed in the 'Member Profile' for the account. The 'User Name' will be included in the email.

 **If the answer entered is incorrect an error will be displayed and the user will have to start the process over.**

LOGGING OUT

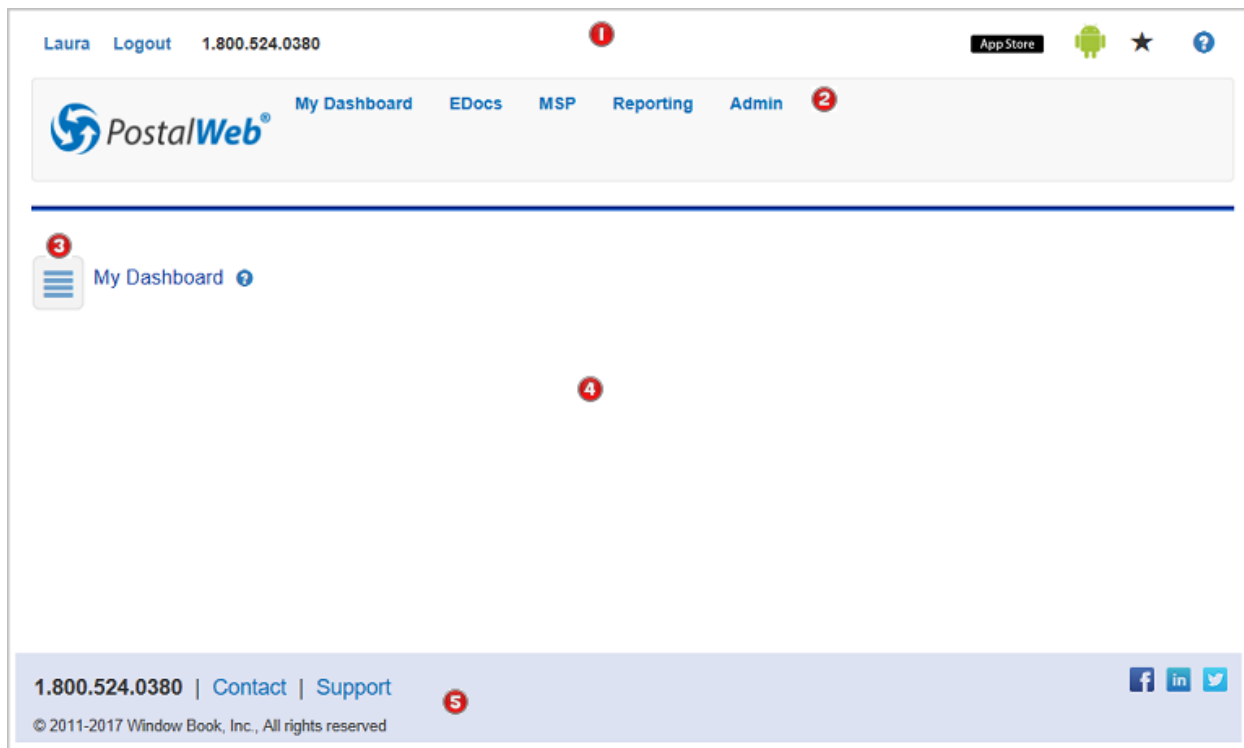
To securely log out of a PostalWeb site, click the 'Logout' link located in the upper left corner of the page.



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POSTALWEB SITE GENERAL OVERVIEW


LAYOUT FUNDAMENTALS

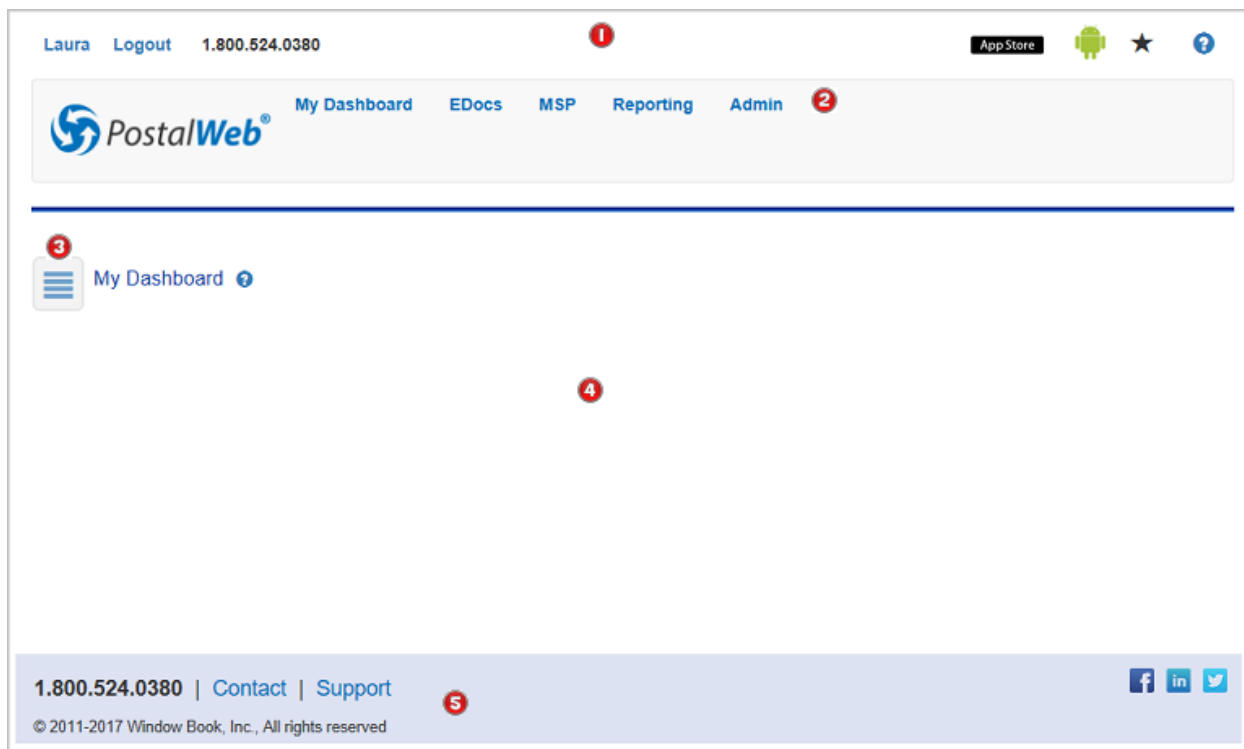




The PostalWeb pages are organized into five main areas:

- **Page Top Frame** ¹: The top frame of each page is always visible and contains the following (in order from left to right):
 - First name recorded in the Member Profile of the user currently logged in. In the screen image above, the first name of the user currently logged in is “Laura”;
 - Login/Logout link: Clicking this link begins the process of either logging in to the PostalWeb site or logging out. When the link is clicked, the process’ corresponding page will display (i.e. “Login Information” page or “You have successfully logged out.” confirmation page);
 - 1-800-524-0380: Phone number for Window Book Client Services group;
 - Links for navigating to the Apple® ^{App Store} and Android™ ^{Android} sources for obtaining PostalWeb mobile phone applications (refer to [PostalWeb Apps for Mobile Phones](#) for more information);
 - Star Icon [★]: Used to set the currently displayed page as the default start-up page. When the star is solid black in color, the page that is currently displayed is the default start-up page (i.e. it is the page that will display when the user first logs in to the site).

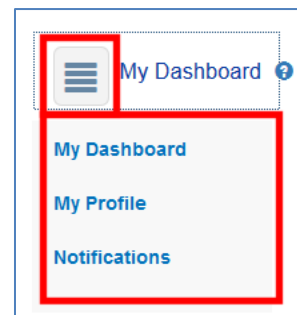
When the displayed page is not set as the default start-up page, the star will show as a blue outline ☆, only (refer to [Setting the Default Start Page](#); and

- Getting Started Help Icon : When this icon located in the page’s top frame is clicked, the *Getting Started with PostalWeb* page will display. This page provides links to various site locations, tutorials, and documentation to assist with using PostalWeb (refer to [Getting Started Help](#) for more information).



- **Site Menu Bar **: The Site Menu Bar contains menu links. The menu links that display are dependent on what Role is assigned to the user that is currently logged in. In the image above, a Role of ‘administrator’ has been assigned to the current user (i.e. all possible menu options are displayed). Clicking any of the links will display that menu’s main home page in the Page Body, along with its’ corresponding Side Menu;
- **Side Menu **: The Side Menu contains additional options for the selected menu. The title of the selected option displays immediately to the right of the Side Menu.

Clicking the Side Menu icon causes it to expand so that any additional options (links) display (image right). Clicking any of the link options will display its’ corresponding page in the Page Body;





- **Page Body⁴**: The Page Body of the site is where the contents of the selected menu/page display; and
- **Page Bottom Frame⁵**: The bottom frame of each page is always visible and contains the following (in order from left to right):
 - 1-800-524-0380: Phone number for Window Book Client Services group;
 - Contact: Clicking this link displays the *Contact Us* page, where the user can send an e-mail message to Window Book. In addition, the Page Bottom Frame expands to display links for 'Privacy' information, 'Terms' information, and a 'Developers' page that provides information to developers that can be used for creating MSP-specific tools utilizing the data provided by their PostalWeb site; and

i **After using the Contact link or any of the links contained therein, use the browser's BACK button to return to the main PostalWeb pages.**

- Social Media Links: Links to Window Book's various social media sites are provided (i.e. Facebook, LinkedIn, and Twitter).

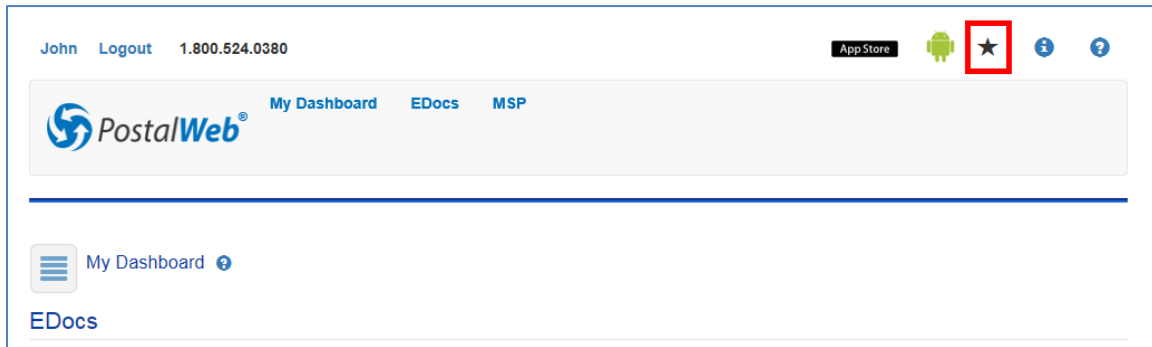
SPECIAL FEATURES

PostalWeb contains a few special features that assist with the overall use of the product.

Setting the Default Start Page

A specific page of the MSP's PostalWeb site can be set as the default page to display when the user first logs into their site. This setting is user-specific, so each user can have their own default start page.

The star icon located in the top frame (right corner) of each PostalWeb page is used for setting the default start page.



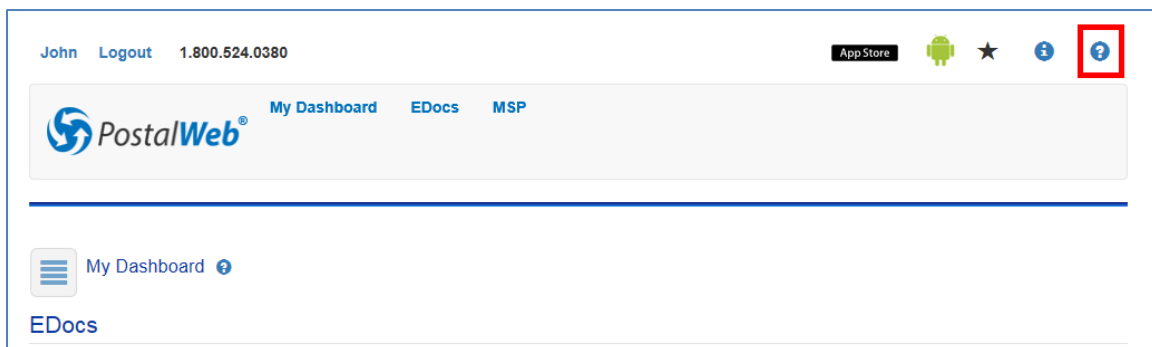
The star icon will be solid black ★ in color when the currently displayed page is set as the default start page. On pages that are not the default start page, the star icon will be displayed as a blue outline ☆.

Click the star icon (blue outline) to set the page currently displayed as the default start page. The star icon will change to solid black.

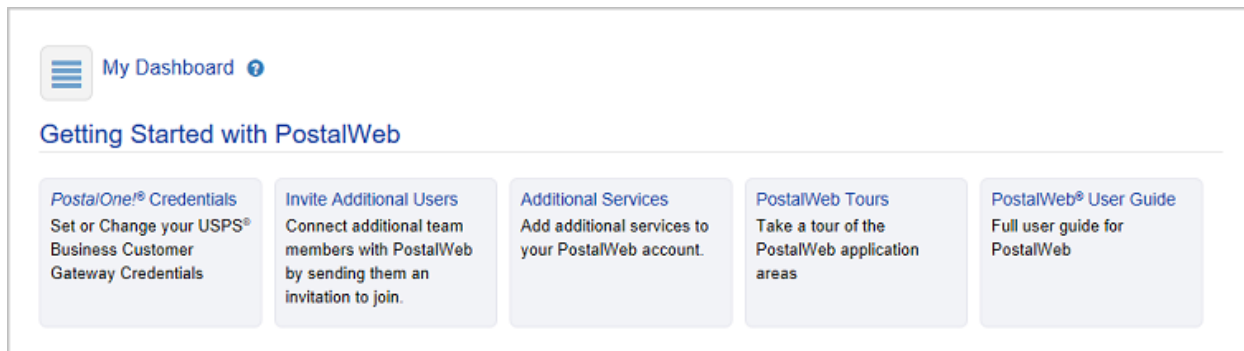
To change the current default start page to a different one, navigate to the page that is to become the default start page and click the star icon (blue outline).

Getting Started Help

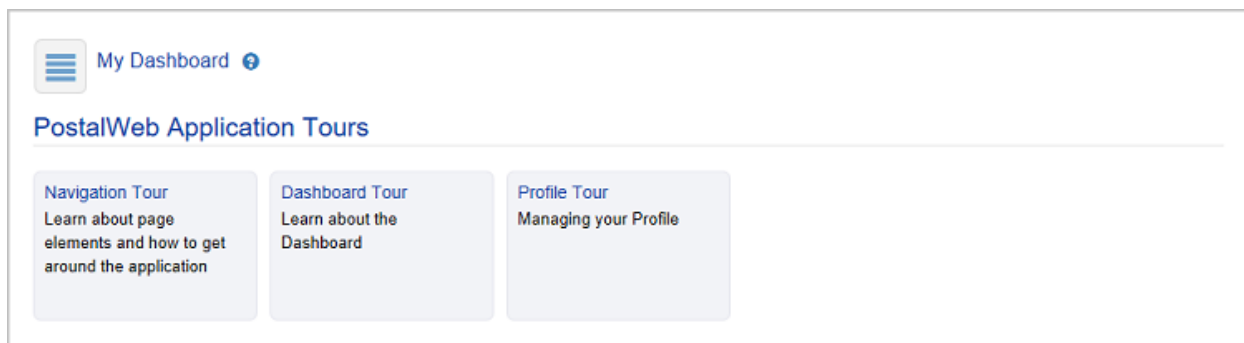
The Getting Started Help icon ⓘ located in the top frame (right corner) of each PostalWeb page displays the *Getting Started with PostalWeb* page, when clicked.



The *Getting Started with PostalWeb* page provides links to important information required for the setup, maintenance, and use of PostalWeb, including product documentation. These links are located in each of the colored areas or ‘tiles’.



- **PostalOne!® Credentials:** Displays a page that allows the entry of the user’s *PostalOne!®* credentials to enable or update the [Auto Statement Download](#) feature with new *PostalOne!®* credentials;
- **Invite Additional Users:** Immediately displays the [Invite Users](#) page (Company Admin and Company Location Manager roles only);
- **Additional Services:** Immediately displays the [Services](#) page (Company Admin role only);
- **PostalWeb Tours:** Immediately displays the *PostalWeb Application Tours* page, which contains tiles that, when clicked on, starts a tour of selected areas of the PostalWeb site:

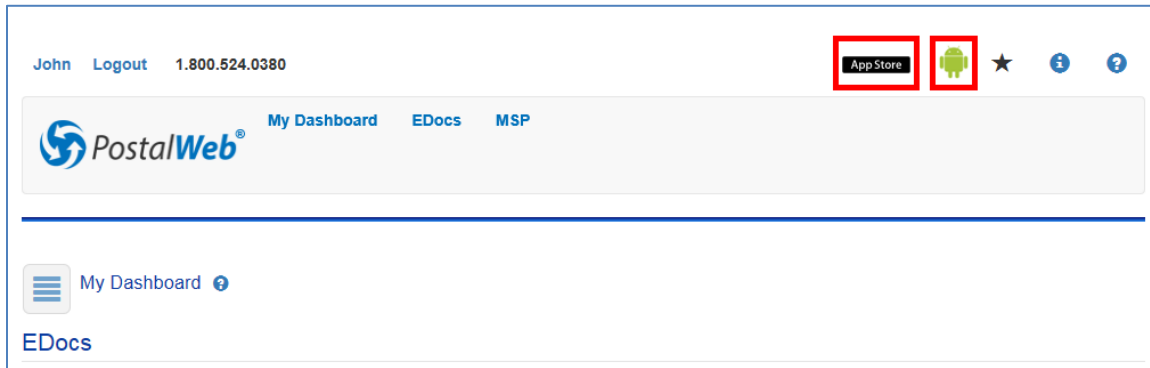


- **Navigation Tour:** Introduces the basic elements of PostalWeb that are available on all pages;
- **Dashboard Tour:** Introduces the summary dashboard; and
- **Profile Tour:** Introduces the components of the *Member Profile* pages.
- **PostalWeb® User Guide:** Direct link to the online “PostalWeb for Mail Service Providers User Guide”.

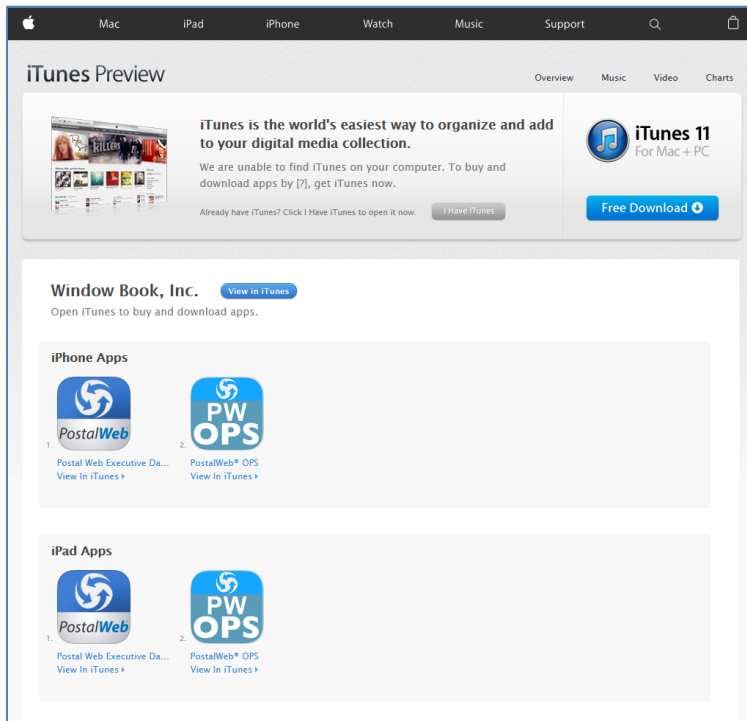
PostalWeb Apps for Mobile Phones


Window Book offers PostalWeb mobile phone apps for the Apple® and Android™ platforms.

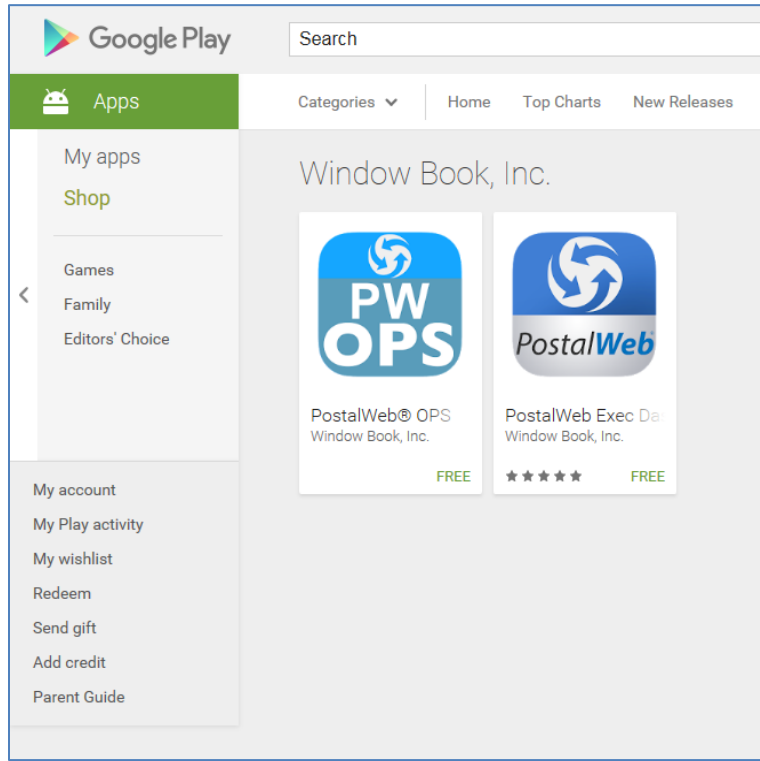
The apps for each platform may be accessed by clicking the platform's corresponding icon located in the top frame (right corner) of any PostalWeb page.



When the App Store icon **App Store** is clicked, a new browser window will open to Window Book's page in the iTunes® app store. PostalWeb apps are available for the iPhone® and iPad®.



When the Android icon () is clicked, a new browser window will open to Window Book's page in the Google Play™ store.



AVAILABLE APPS


PostalWeb® Executive Dashboard: The 'PostalWeb® Executive Dashboard' mobile app helps managers view the status of Mail.dat files submitted to *PostalOne!*. It also provides statistics on these submissions as well as postage summaries for date ranges requested by the user.



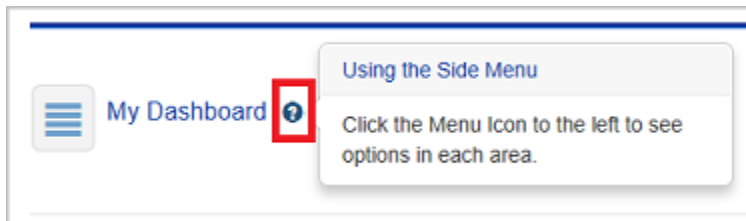
PostalWeb® Ops: The 'PostalWeb® OPS' mobile app notifies mailers using Window Book's PostalWeb website when new postage statements have been retrieved from *PostalOne!*.



Basic Help Icons / Tool Tips

Basic help icons or tool tips  are used throughout PostalWeb to provide pertinent information – usually a short description or tip – of the associated menu or subject it is located adjacent to.

Hovering the mouse pointer over the icon displays a text box containing the information. Moving the mouse away from the icon (i.e. icon loses focus), closes the text box.



USING POSTALWEB

This section identifies the various roles that are available for assigning to PostalWeb users. In addition, it provides descriptions of the menus and menu options found in PostalWeb, including use instructions for each. The role(s) that can access and use each menu/menu option is also included along with each description.



Descriptions and use instructions for the various PostalWeb Reporting options identified in [Reporting Menu](#) are provided in a separate section of this Guide (i.e. [POSTALWEB REPORTING](#)).

Menus and their options are provided in the order they appear in the 'site menu bar' (refer to [LAYOUT FUNDAMENTALS](#) for more information). For a quick, at-a-glance image of the full PostalWeb menu structure, refer to [PostalWeb Menu Structure At-A-Glance](#) in Appendix 1 of this Guide.



For instructions on how to register or create a new PostalWeb site, along with information on the setup and configuration of it, refer to the [PostalWeb for Mail Service Providers Setup Guide](#), which is available on the [Window Book web site](#) at: <https://www.windowbook.com/Support/UserGuides>. Registration and/or login is required.

ROLES

All users of a PostalWeb site are assigned a 'role'. A role can be thought of as a permissions level. When a person is invited to become a PostalWeb user (see [Becoming a PostalWeb User](#)), they are assigned a role by a Company Admin or Company Location Manager at the time the invitation is made. Their role can be changed at a later date by the appropriate personnel (Company Admin: Refer to MSP Menu > [MANAGE USERS OPTION](#) for more information; Company Location Manager: Refer to Location Menu > [MANAGE USERS OPTION](#) for more information).

The following is a list of the available roles with an explanation of each:

- **Company Admin**: Has full access to the entire site and should be assigned with great care. Administrators can assign any role, but cannot change their own role or deactivate themselves;
- **IT Personnel**: Has minimal access, similar to a user;
- **Company Location Manager**: Has less access than a Company Admin, but has wide overall rights and is the only role besides an Company Admin that can invite new users. Generally has control over all locations and Company Location Users. Can only assign roles of 'Company Location Manager' and 'Company Location User';
- **Company Location User**: Has minimal access and is generally under the control of the Company Location Manager (and Company Admin). Can access data from multiple locations as assigned by the Company Location Manager or Company Admin;
- **Company CSR**: Is a role designed specifically for a Customer Service Representative of the MSP. It is intended to give the MSP control over releasing statements to mail owners; and

- Company User: Typically only receives automated communications such as e-mailed statements and confirmation pages.



The term ‘user’ is used throughout this document as a general name for any member of a PostalWeb site, not as the specific role level of ‘User’.

Features available for the various roles are shown in the [Menu Accessibility](#) section of Appendix 1 in this Guide.

POSTALWEB MENUS

The following section describes the available menus and menu options found in PostalWeb, along with components of each. The description of each menu option will also provide what role or roles have access to it.



Not all roles have the required permissions to view all menus.

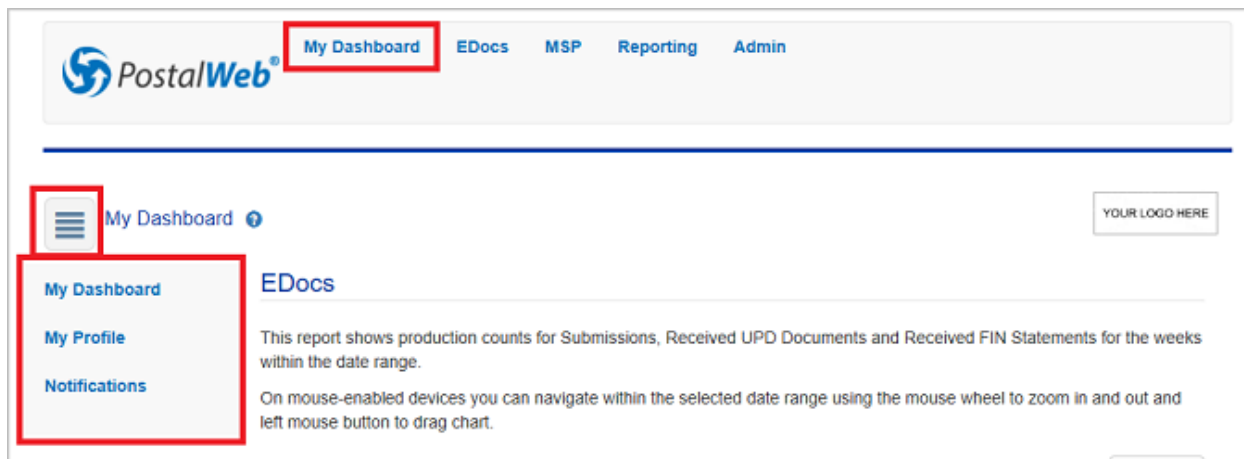
My Dashboard Menu

Role Access: ALL

The ‘My Dashboard’ area generally contains administrative information, such as the user’s profile and any system notifications.

Clicking the ‘My Dashboard’ menu option displays the main ‘My Dashboard’ page, and clicking the ‘My Dashboard’ side menu to expand it displays the additional options within the ‘My Dashboard’ area. The options within the ‘My Dashboard’ area are:

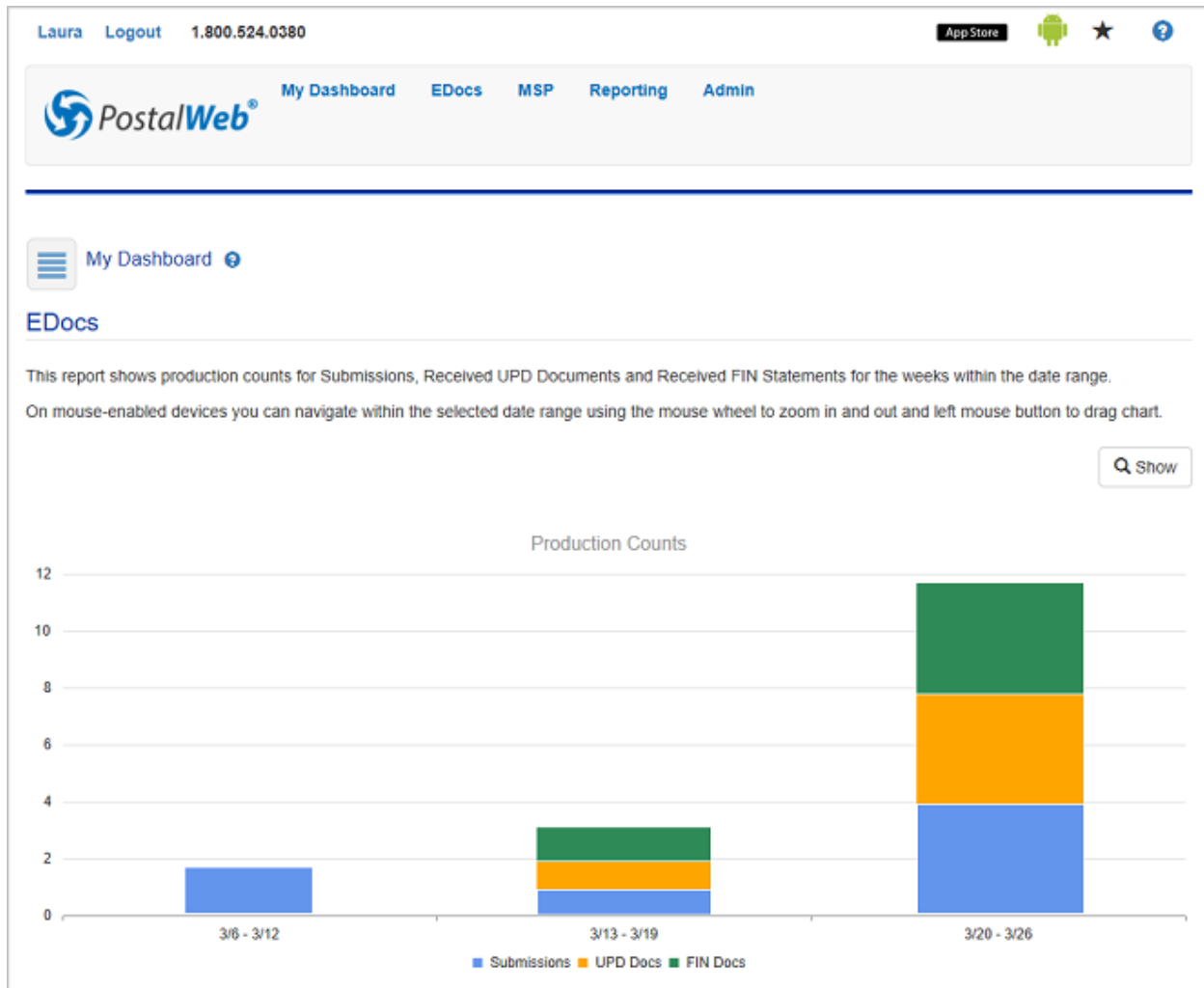
- [My Dashboard](#);
- [My Profile / Member Profile](#); and
- [Notifications](#).



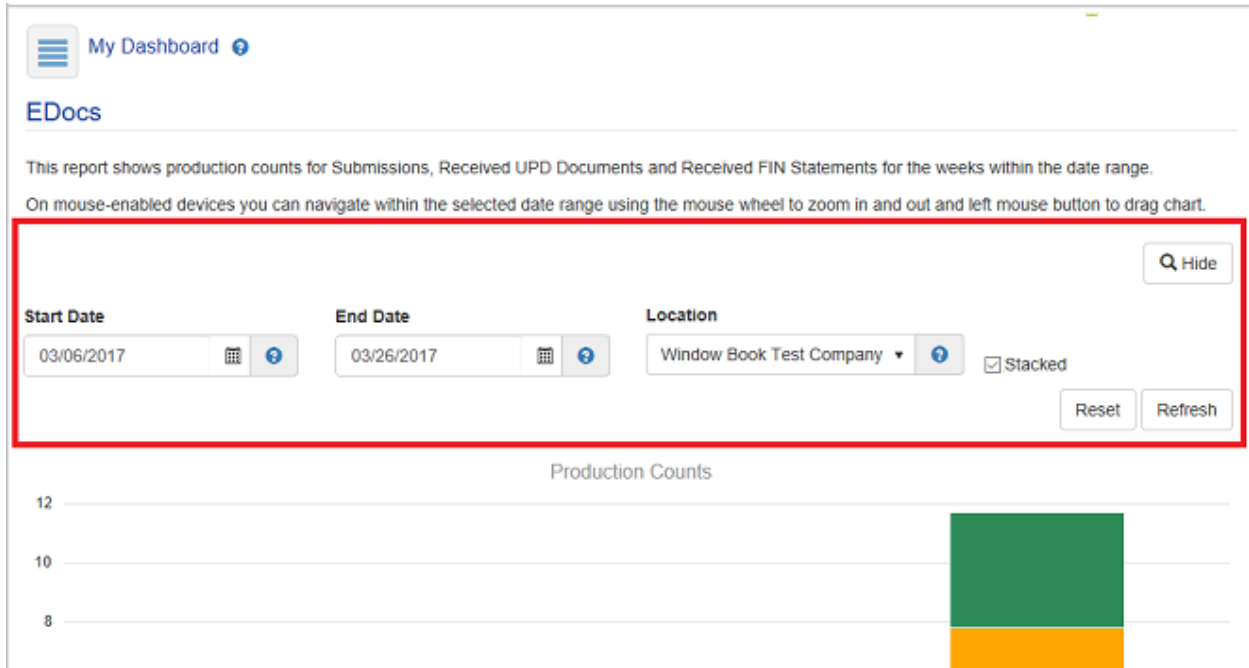
MY DASHBOARD OPTION

Role Access: ALL

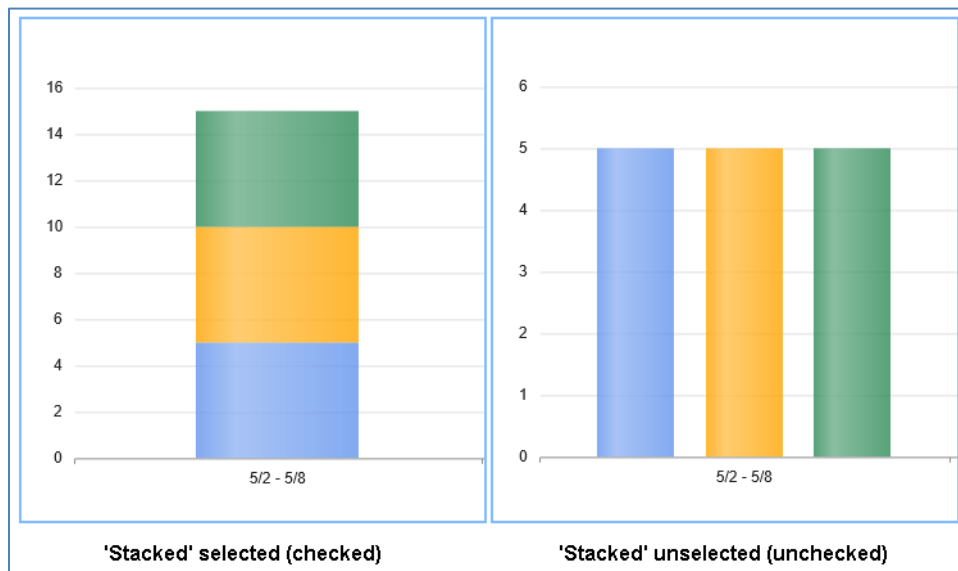
The *My Dashboard* screen shows the EDocs production history of the MSP's submissions (blue in color), received UPD documents (yellow in color) and received FIN statements (green in color) for a 3 week period.



The three week period used to show the submission history can be changed. Click the **Show** button to reveal all of the filters and controls.



- **Start Date:** The first date to be included in the display. The default date value is 14 days earlier than the current date;
- **End Date:** The last date to be included in the display. The default value is the current date;
- **Location:** Used to filter by a single location or all locations if desired;
- **Stacked checkbox:** When selected (checked, by default), the statement types (submissions, UPD docs and FIN Docs) are displayed in a vertically stacked format. If unselected (unchecked), each type of statement is displayed individually, side-by-side;



i *Any time the 'Start Date', 'End Date' or 'Location' settings are changed, the 'Refresh' button must be clicked to update the displayed data. The 'Refresh' button will turn blue in color when the displayed data is stale and the 'Refresh' button needs to be clicked.*

- **Reset button:** When clicked, the filter settings will be reset to their default settings; and
- **Hide button:** When clicked, the filter settings will become hidden.

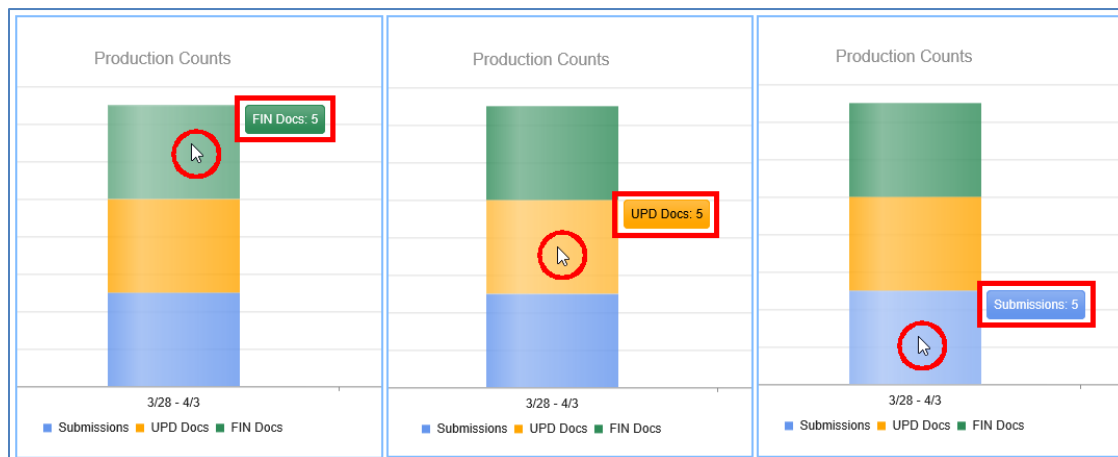
When initially displayed, the date range (difference between the 'Start Date' and 'End Date') defaults to the previous 14 days. The date values may be modified to the desired time span. After modifying the date(s), the **Refresh** button must be clicked to update the display. Once refreshed, the display will show the earliest five weeks of data within the range specified.

The specific weeks of data that is displayed may also be changed by placing the mouse cursor within the chart area and 'dragging' the mouse cursor (i.e. placing the mouse cursor over the chart, clicking and holding the left mouse button while the mouse is moved) to either the left or right direction. The 'Start Date' and 'End Date' specify the limits of the displayed data.

The number of weeks displayed may be modified by placing the mouse cursor within the chart area and rotating the mouse wheel, if so equipped, to zoom-in (to display one week) or zoom-out (to display up to twenty weeks maximum). The 'Start Date' and 'End Date' specify the limits of the displayed data.

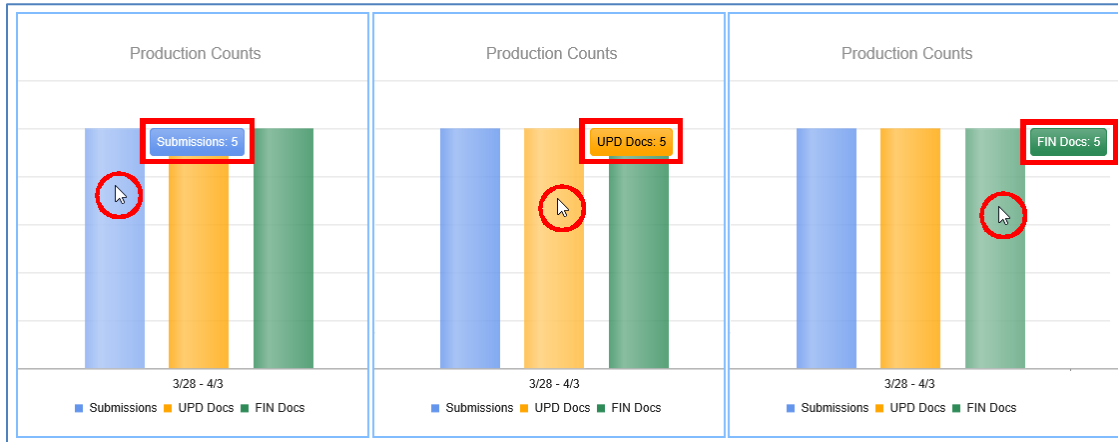
Placing (hovering without clicking) the mouse cursor within a colored chart graphic will display the amount of statements the graphic represents.

In the case of the 'Stacked' option being selected (checked).

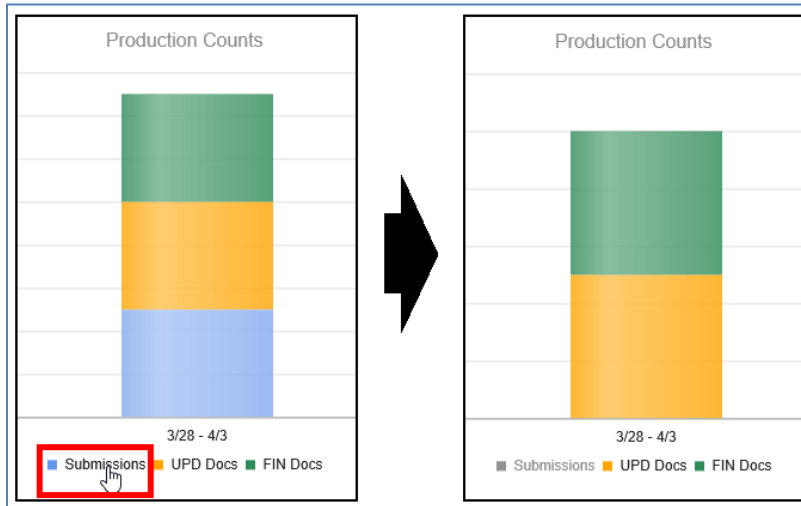


Using PostalWeb

In the case of the 'Stacked' option being unselected (unchecked).



Located directly below the 'Production Counts' graph a legend is displayed. By clicking each statement type text within the legend, the displayed statement type may be hidden or shown on the graph.

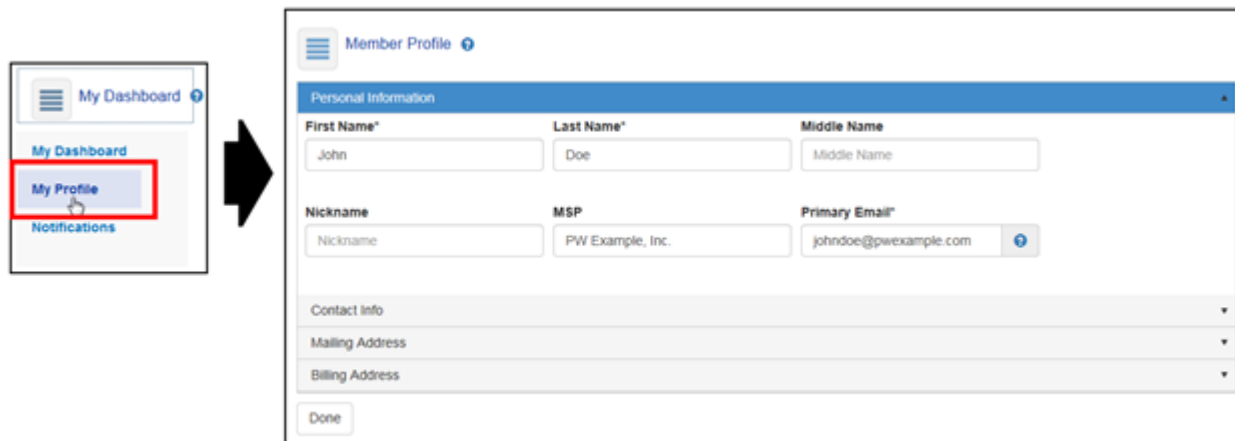


MY PROFILE / MEMBER PROFILE OPTION

Role Access: ALL

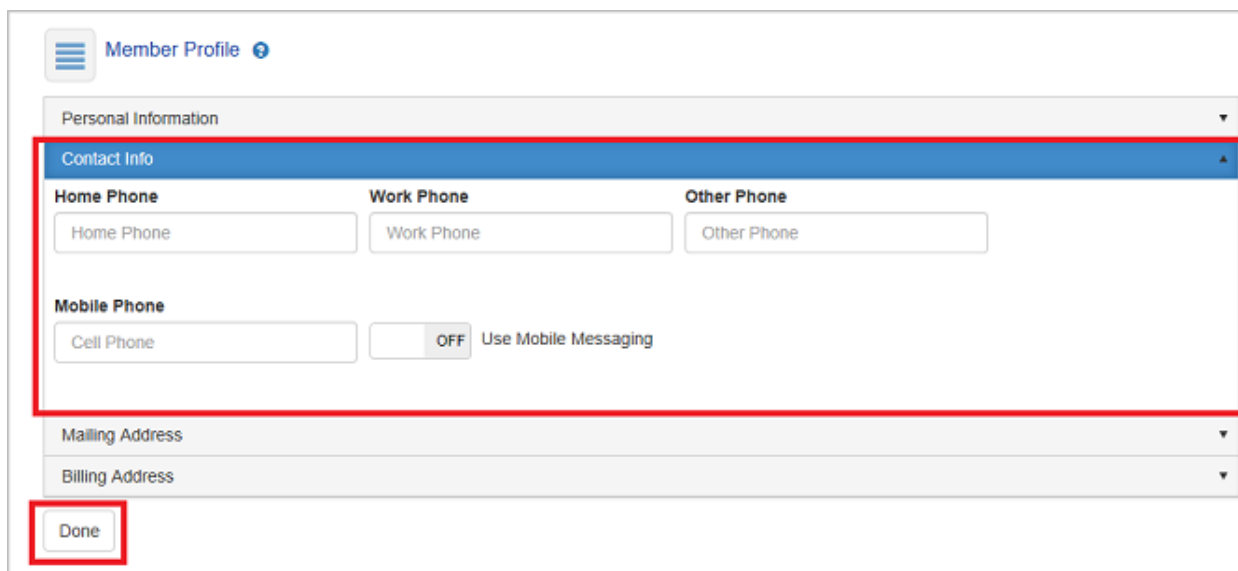
After selecting the menu option 'My Profile', a new heading is displayed (i.e. 'Member Profile') next to the side menu. The default screen that displays along with 'Member Profile' is the 'Personal Info' screen.

i This is the only sub-category where the heading on the side menu changes and does not reflect a top menu heading (in this case, 'My Dashboard').



From the Member Profile screen (also known as the 'Personal Info' screen), the user can edit some personal contact information for themselves that is on file in the PostalWeb system. This information was entered when the user registered the site or was invited to be a user by the site Administrator or Location Manager. The screen is separated into 4 categories: 'Personal Information'; 'Contact Info'; 'Mailing Address'; and 'Billing Address'.

The 'Personal Information' category is displayed by default when the screen is accessed. To view the detail for any of the other categories, click on the category's header to expand it. The 'Personal Information' category will collapse and whatever category was clicked, will expand to show its contents. In the screen image below, the 'Contact Info' category was clicked.

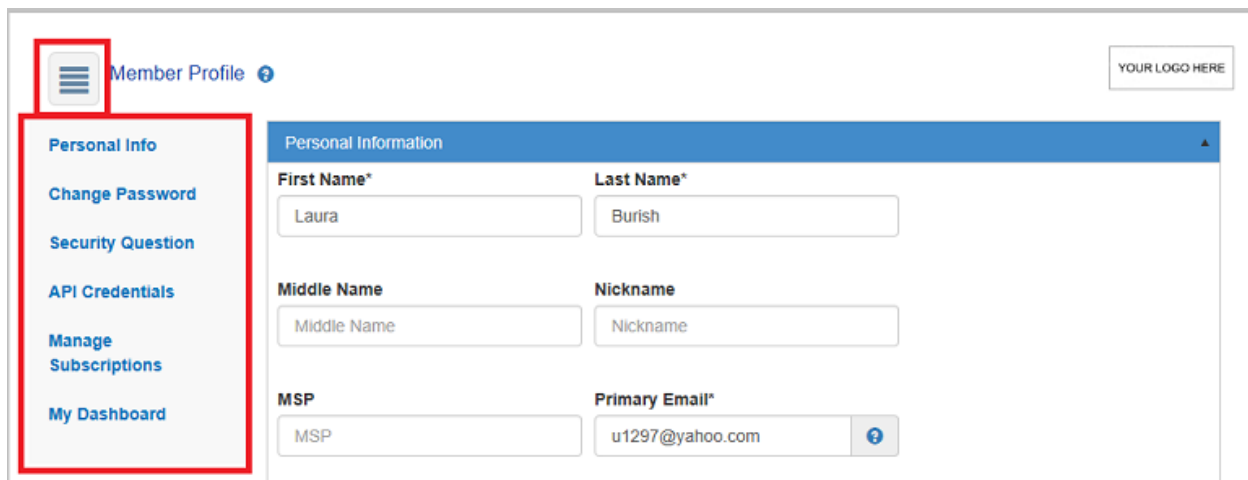


If updates are made to the user's information on this screen, make sure to click the **Done** button when finished to insure that the changes are saved. Navigating away from this screen without clicking the **Done** button will result in all updates being lost.

 For detailed information on the contents of each category, refer to [Personal Info](#) section below.

In addition to the 'Personal Info' screen, the Member Profile page contains additional options specific to the user that are accessible via the side menu. Click the side menu to expand it. The options within the 'Member Profile' side menu are:

- [Personal Info](#);
- [Change Password](#);
- [Security Question](#);
- [API Credentials](#);
- [Manage Subscriptions](#) ; and
- [My Dashboard](#).



The screenshot shows the 'Member Profile' page. On the left, a side menu is expanded, listing: Personal Info, Change Password, Security Question, API Credentials, Manage Subscriptions, and My Dashboard. The main content area is titled 'Personal Information' and contains the following fields:

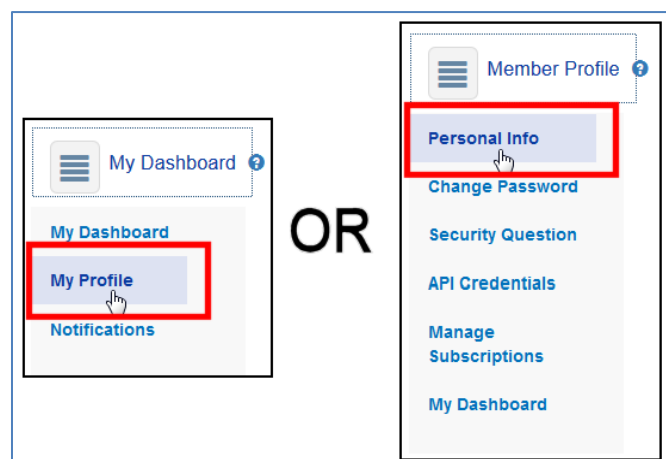
First Name*	Last Name*
<input type="text" value="Laura"/>	<input type="text" value="Burish"/>
Middle Name	Nickname
<input type="text" value="Middle Name"/>	<input type="text" value="Nickname"/>
MSP	Primary Email*
<input type="text" value="MSP"/>	<input type="text" value="u1297@yahoo.com"/>

Personal Info Option

Role Access: ALL

The *Personal Info* screen allows the user to enter or edit contact information. It can be displayed by clicking:

- 'My Dashboard' > 'My Profile'; or
- 'My Dashboard' > 'My Profile' > 'Member Profile' > 'Personal Info'.



The *Personal Info* screen is separated into 4 categories: 'Personal Information'; 'Contact Info'; 'Mailing Address'; and 'Billing Address'.

PERSONAL INFORMATION CATEGORY

The 'Personal Information' category is displayed by default when the *Personal Info* screen is accessed.

The screenshot shows a web interface for a 'Member Profile'. At the top left is a hamburger menu icon and the text 'Member Profile' with a help icon. Below this is a blue header for the 'Personal Information' category. The form contains several input fields: 'First Name*' with the value 'John', 'Last Name*' with 'Doe', 'Middle Name' with 'Middle Name', 'Nickname' with 'Nickname', 'MSP' with 'PW Example, Inc.', and 'Primary Email*' with 'johndoe@pwexample.com'. Below these fields are three expandable sections: 'Contact Info', 'Mailing Address', and 'Billing Address', each with a downward arrow. At the bottom left is a 'Done' button.

To view the detail for any of the other categories, click on the category's header to expand it. The 'Personal Information' category will collapse and whatever category was clicked, will expand to show its contents.

The 'Personal Information' category contains the following fields (required fields are denoted with an asterisk '*'):

- **First Name*:** First name of user;
- **Last Name*:** Last name of user;
- **Middle Name:** Middle name of user;
- **Nickname:** A custom, substitute name the user prefers to be referred to;
- **MSP:** Typically the name of the user's employer; and
- **Primary Email*:** The user's primary company email address. This email address is used for various communications purposes, including system notifications and verification of identity.



It is important to enter a valid, functioning email address. If the user forgets their password or User Name, the information needed to resume using the account will be sent to this email address.

CONTACT INFO CATEGORY

The screenshot shows a 'Member Profile' page with a 'Contact Info' category selected. The category is expanded to show three input fields: 'Home Phone', 'Work Phone', and 'Other Phone'. Below these is a 'Mobile Phone' section with a 'Cell Phone' input field and a toggle switch for 'Use Mobile Messaging' currently set to 'OFF'. At the bottom of the form are sections for 'Mailing Address' and 'Billing Address', and a 'Done' button.

The 'Contact Info' category contains the following fields (required fields are denoted with an asterisk '*'):

- **Home Phone:** The user's home phone number;
- **Work Phone:** The user's work phone number;
- **Other Phone:** A secondary phone if available;
- **Mobile Phone:** The user's mobile cell phone if available; and
- **Use Mobile Messaging:** Select this option if the user desires to receive text messages via their mobile phone. Click the button graphic to toggle between 'ON' (ON) and 'OFF' (OFF).

MAILING ADDRESS CATEOGRY

The screenshot shows a web interface for editing a member's profile. At the top, there is a 'Member Profile' header with a menu icon and a help icon. Below this are three expandable sections: 'Personal Information', 'Contact Info', and 'Mailing Address'. The 'Mailing Address' section is currently expanded and highlighted in blue. It contains the following fields: a 'Country' dropdown menu set to 'United States'; three input fields for 'Line 1*' (containing '300 Franklin St.'), 'Line 2' (containing 'Line 2'), and 'City*' (containing 'Cambridge'); two dropdown menus for 'State*' (set to 'MA') and 'Zip Code*' (containing '02139'); and a checkbox labeled 'ON' for 'Mailing & Billing are the same*'. Below the 'Mailing Address' section is a 'Billing Address' section, which is currently collapsed. At the bottom left of the form is a 'Done' button.

The 'Mailing Address' category contains the following fields (required fields are denoted with an asterisk '*'):



The address entered here should be the address of the MSP location where the user is currently working at. This information is used to send correspondence, statements, etc.

- **Country:** Select the country the MSP resides in using the pull-down menu (i.e. United States or Canada). This selection changes the display to include certain fields in accordance with each country's address requirements:
 - **United States:** Required fields will include:
 - **State*:** Select the State from the pull-down menu; and
 - **Zip Code*:** Enter the base 5-digit ZIP Code assigned to the MSP's location.
 - **Canada:** Required fields will include:
 - **Province*:** Select the Canadian province the MSP resides in from the pull-down menu selection; and
 - **Postal Code*:** Enter the Canadian postal code assigned to the MSP's location.
- **Line 1*:** Street address of the MSP;
- **Line 2:** Secondary street address, if necessary;
- **City*:** The city the MSP is located in; and

- **Mailing & Billing are the same*:** If the mailing and billing address are the same, set this option to 'ON'. When set to 'ON', the mailing information entered on this screen will be copied to the Billing Address category. Click the button graphic to toggle between 'ON' and 'OFF'.

BILLING ADDRESS CATEGORY

The screenshot shows the 'Member Profile' interface with the 'Billing Address' category selected. The form includes the following fields:

- Country:** A dropdown menu with 'United States' selected.
- Line 1:** A text input field containing '300 Franklin St.'
- Line 2:** An empty text input field.
- City:** A text input field containing 'Cambridge'.
- State:** A dropdown menu with 'MA' selected.
- Zip Code:** A text input field containing '02139'.

A 'Done' button is located at the bottom left of the form.

The address entered into the Billing Address category should be the address of the location that mailer billables, statements, *PostalOne!*-generated documents, etc. should be sent to.

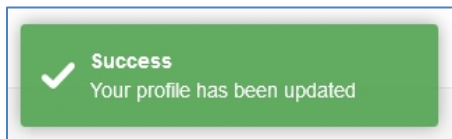
 **Refer to the field descriptions provided for the Mailing Address category when selecting/entering data for the Billing Address.**

 **When changing the Billing Address, the 'Mailing & Billing are the same' option should be set to 'OFF' (see 'MAILING ADDRESS CATEGORY' in this section for more information).**

When all items have been entered or edited in the *Personal Information* screen categories, click the **Done** button for the changes to take effect.

The screenshot shows the 'Member Profile' interface with the 'Billing Address' section selected. The form includes a 'Country' dropdown set to 'United States', 'Line 1' (300 Franklin St.), 'Line 2' (empty), 'City' (Cambridge), 'State' (MA), and 'Zip Code' (02139). A 'Done' button is located at the bottom left of the form area and is highlighted with a red rectangular box.

A confirmation message will display.



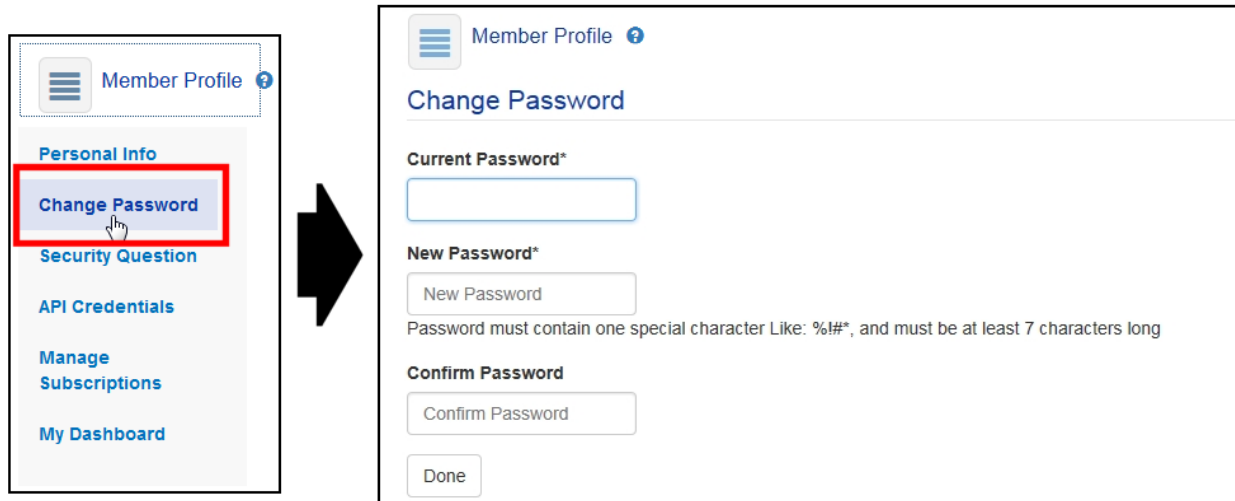
! *Navigating away from the 'Personal Information' screen before clicking the DONE button will result in the loss of any changes made.*

Using PostalWeb

Change Password Option

Role Access: ALL

The *Change Password* screen allows the user to change the password they use for logging in to their PostalWeb site.



The *Change Password* screen contains the following fields (required fields are denoted with an asterisk '*'):

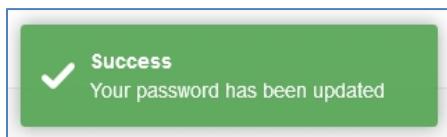
- **Current Password***: Enter the current password assigned to this account;
- **New Password***: Enter a new/different password to use. The password must be:
 - At least 7 characters long; and
 - Must contain a "special character" (i.e. ~ ` ! @ # \$ % ^ & * () _ + | - = \ [] { } ; ' : , . < > / ?);

As the new password is entered, a 'Password Strength' meter will be displayed and show the approximate strength of the new password.



- **Confirm Password**: Enter the new password a second time. The password entered here must match exactly the password entered in the 'New Password' field.

When finished, the user must click the **Done** button to implement the new password. A confirmation message will display.

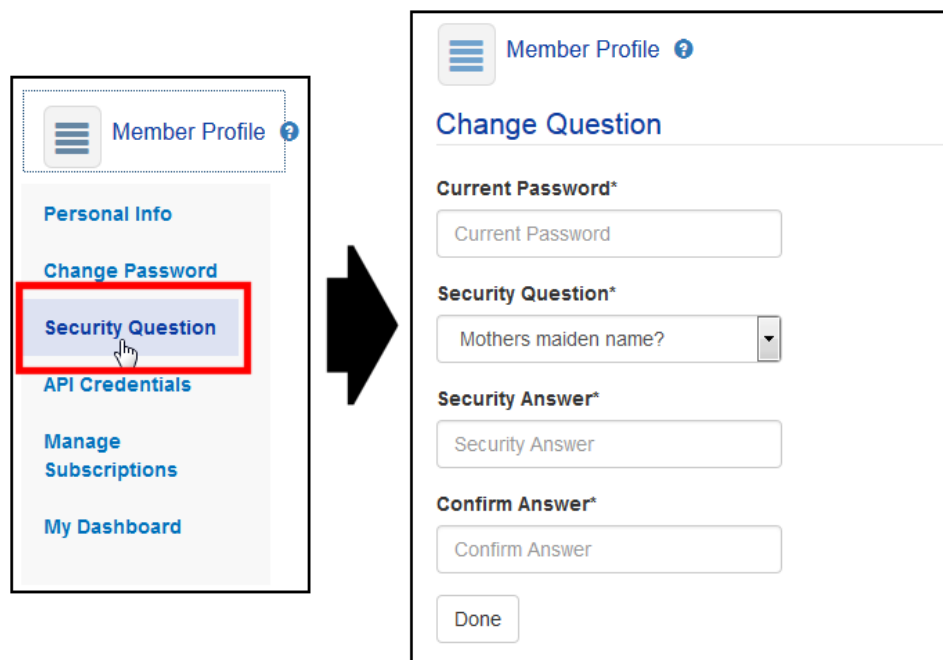


! *Navigating away from the 'Change Password' screen before clicking the DONE button will result in any updates or changes made to be lost.*

Security Question Option

Role Access: ALL

The *Security Question* screen allows the user to change the 'Security Question' or the answer to the existing question. The 'Security Question' is used when the user asks to have their password reset via the ['Forgot Your Password?'](#) or ['Forgot Your User Name?'](#) links on the PostalWeb login screen. The user must know the correct answer to complete either of these requests.

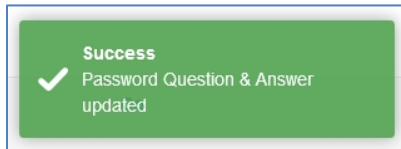


The *Security Question* screen contains the following fields (required fields are denoted with an asterisk '*'):

- **Current Password***: In order to change the 'Security Question' or 'Security Answer', the correct password for the account must be entered;
- **Security Question***: Select a question from the drop down list provided;

- **Security Answer*:** Enter the correct answer to the question selected. The user needs to remember the answer for future use as described above; and
- **Confirm Answer*:** Enter the same answer again. The 'Confirm Answer' entry must match the 'Security Answer' exactly, including the upper and lower case used in the 'Security Answer'.

When finished configuring the new 'Security Answer' click the **Done** button. A confirmation message will display.



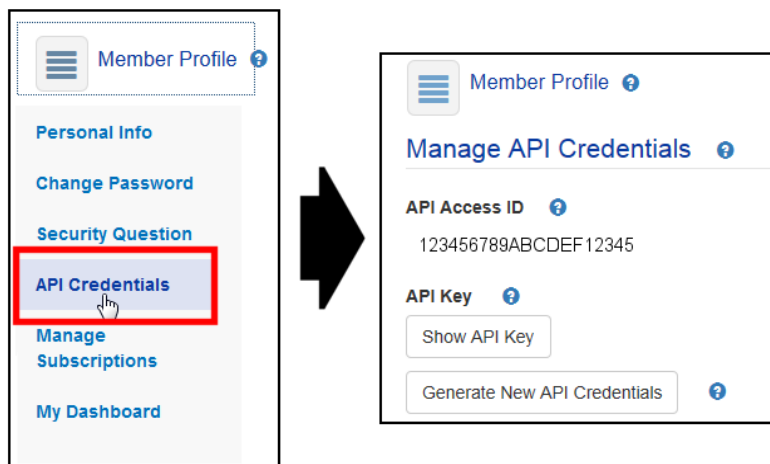
! *Navigating away from the 'Change Question' screen before clicking the DONE button will cancel any changes that have been made, and the new 'Security Question' and/or 'Security Answer' will not be implemented.*

API Credentials Option

Role Access: ALL

Clicking the 'API Credentials' menu option in the My Dashboard side menu displays the *Manage API Credentials* screen. The *Manage API Credentials* screen allows the user to view their assigned API Credentials. API credentials are used for provisioning an MSP's PostalWeb site with other Window Book applications, such as MailDrop™ Engine and By/For Validate™. Provisioning allows for communication to occur between PostalWeb, other Window Book software applications, and *PostalOne!*.

i *The 'API Credentials' menu option is also available from within the MSP side menu for Company Admins only. Refer to [MSP Menu](#) > [API CREDENTIALS OPTION](#) for more information.*



To view the 'API Key', click the **Show API Key** button.

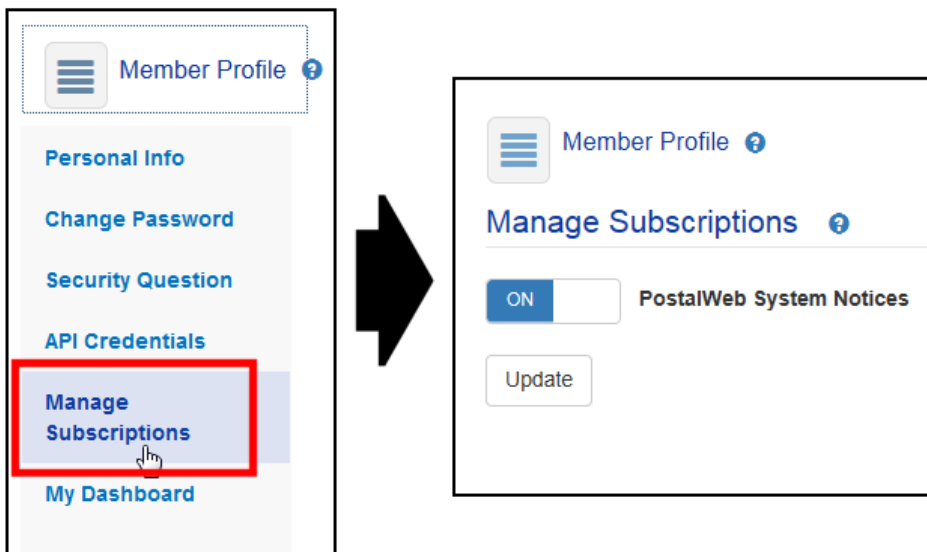
! *PostalWeb's API credential information is highly sensitive. Care should be taken when copying and pasting the API credentials from PostalWeb to other Window Book software applications.*

! *Never click the GENERATE NEW API CREDENTIALS button unless requested to do so by Window Book's Professional Services!*

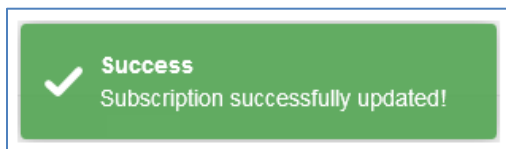
Manage Subscriptions Option

Role Access: ALL

The *Manage Subscriptions* screen allows the user to manage the subscriptions and notifications that were authorized for them by a site Administrator. Authorized subscriptions or notifications are listed in this screen. The ability to turn those subscriptions or notifications on and off is also available. Click the button graphic to toggle between 'ON' () and 'OFF' ().



After making the desired changes, click the **Update** button. A confirmation message will display.



Using PostalWeb

My Dashboard Option

Role Access: ALL

Clicking the 'My Dashboard' menu option, navigates the user back to the original *My Dashboard* screen (refer to [My Dashboard](#) above).



NOTIFICATIONS OPTION

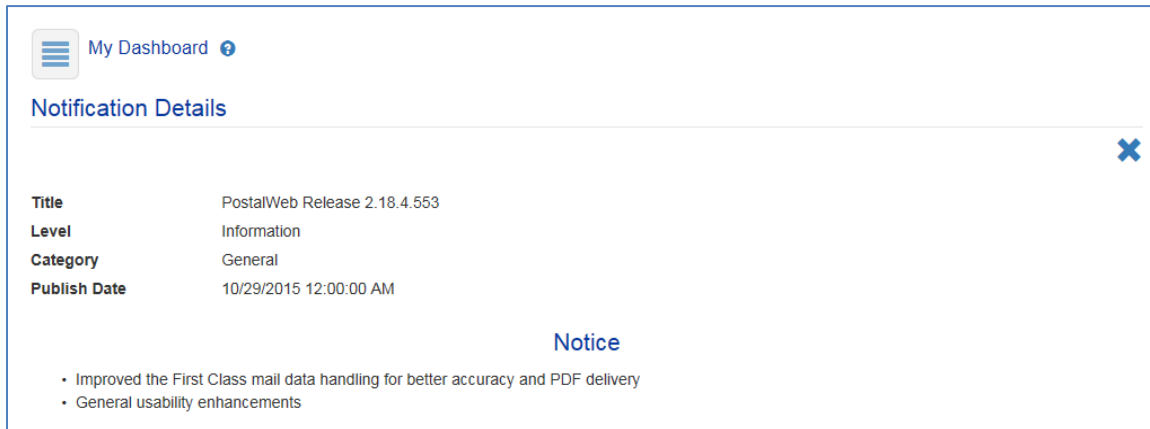
Role Access: ALL

The *Notifications* screen displays a list of all the notifications to date, in summary form.

Title	Level	Category	Summary	Date
PostalWeb Release 2.18.4.553	Information	General	PostalWeb Release 2.18.4.553 Improved the First Class mail data handling for better accuracy and PDF delivery ...	10/28/15
BCG Service Issues	Warning	System	The BCG is experiencing intermittent outages	07/24/15
Sunday July 19th, 2015 Update	Information	General	PostalWeb.NET has been updated	07/19/15

Single click a row to see the detail

Clicking on a notification summary displays the *Notification Details* screen, which contains the detail for that specific notification.



Title	PostalWeb Release 2.18.4.553
Level	Information
Category	General
Publish Date	10/29/2015 12:00:00 AM

Notice

- Improved the First Class mail data handling for better accuracy and PDF delivery
- General usability enhancements

When finished viewing, click the cancel icon () to go back to the main *Notifications* screen.

 ***Notifications will also be emailed to the 'Primary Email' address listed in the user's 'Member Profile'.***

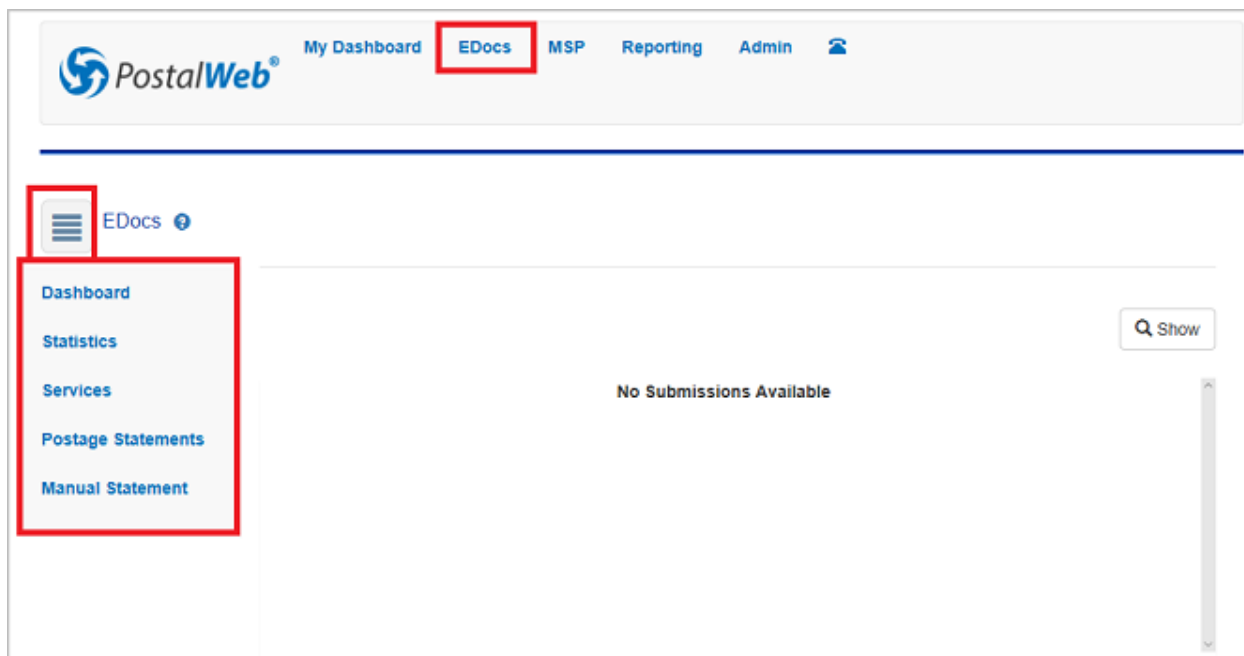
EDocs Menu


Role Access: ALL (except the 'Services' and 'Manual Statement' options)

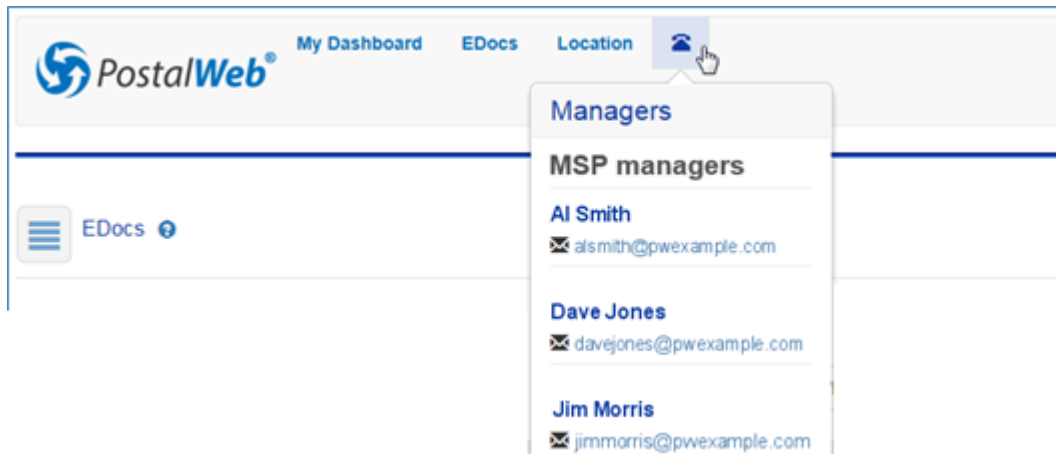
Clicking the EDocs menu displays the *EDocs / Dashboard* screen, which is the main viewing area for jobs, statistics, postage statements, etc. (refer to [Dashboard Option](#) for more information about the contents of the *Dashboard* screen).

Click the EDocs side menu to expand it. The options within EDocs side menu are:

- [Dashboard](#);
- [Statistics](#);
- [Services](#);
- [Postage Statements](#); and
- [Manual Statement](#).



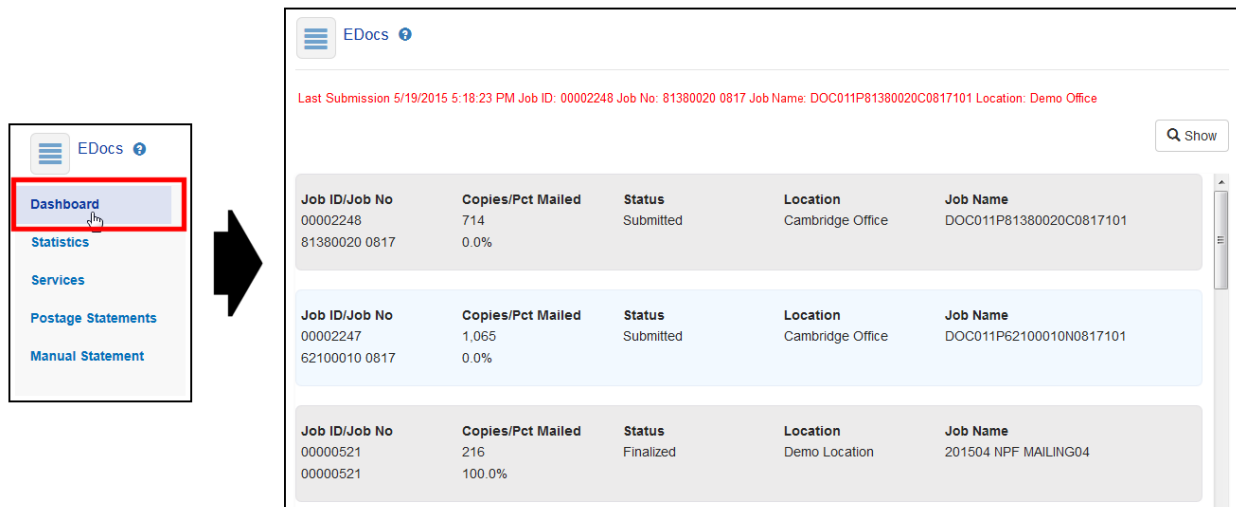
When the EDocs category is selected, a telephone icon  is displayed in the [site's menu bar](#) near the top of the web page. Clicking the telephone icon displays a list of available MSP Managers and Location Managers for easy site-user reference.



DASHBOARD OPTION

Role Access: ALL

The *Dashboard* screen is displayed immediately after clicking the EDocs menu or by clicking the 'Dashboard' option in the EDocs side menu.



The *Dashboard* screen displays the list of jobs submitted to, and returned from, *PostalOne!*. Above the list of jobs a message displays, either red or green in color, that alternates every 30 seconds between the latest submission to *PostalOne!* and the latest receipt from *PostalOne!*.

The screenshot shows the 'EDocs' section of the PostalWeb dashboard. At the top, a red notification bar displays: "Last Submission 5/19/2015 5:18:23 PM Job ID: 00002248 Job No: 81380020 0817 Job Name: DOC011P81380020C0817101 Location: Demo Office". Below this is a table with the following data:

Job ID/Job No	Copies/Pct Mailed	Status	Location	Job Name
00002248	714	Submitted	Cambridge Office	DOC011P81380020C0817101
81380020 0817	0.0%			

i *The jobs are displayed in order of PostalOne! processing time, with the most recently processed job displayed first in the list.*

The jobs displayed in list are based on filter criteria that the user specifies. Click the **Show** button to view the available filters.

The screenshot shows the filter section of the PostalWeb dashboard. A red box highlights the filter area, which includes a "Hide" button and the following fields:

- Start Date:** 03/08/2016
- Job ID:** [Empty field]
- Job Number:** [Empty field]
- Location*:** All
- Mail Owner:** [Empty dropdown]
- Permit Number:** [Empty field]

Buttons for "Reset" and "Refresh" are also visible. Below the filters is the same table of jobs as shown in the previous screenshot.

- **Start Date:** The date shown is the LAST date of the jobs to be displayed (inclusive). Only jobs with dates previous to the date shown will be displayed. Jobs with dates after the date displayed will NOT be shown. This filter is not used if the Job ID or Job No is used as a filter;

i *The Start Date value is limited to the previous 90 days.*

- **Job ID:** Filters on a Job ID. Entering the entire Job ID string is not necessary; it is only necessary to enter as many leading characters as needed to filter the list as desired. Multiple jobs may be displayed if the entire Job ID is not entered. The 'Start Date' is not used as a filter when this field is used;
- **Job Number:** Filters on a Job Number. Entering the entire Job Number is not necessary; it is only necessary to enter as many leading characters as needed to filter the list as desired. Multiple

jobs may be displayed if the entire Job ID is not entered. The 'Start Date' is not used as a filter when this field is used;



Any leading zeros must also be entered.

- **Location*:** Used to filter by a single location if desired. This filter is required and is always used in combination with the other filters. The ability to select one or multiple locations is predicated on the 'role' assigned to the user currently logged in;
- **Mail Owner:** Used to filter by a specific mail owner. This is a pull down list that is automatically populated as the PostalWeb service processes statements; and
- **Permit Number:** Used to filter displayed jobs by the permit number used.

In addition, there are three control or function buttons used with the available filters:

- **Reset button:** When clicked, the filter settings will be reset to their default settings;
- **Refresh button:** Used to update the displayed jobs list any time a filter is changed. The button will turn blue in color when the displayed data is stale and the **Refresh** button needs to be clicked; and
- **Hide button:** When clicked, the filter settings will become hidden, at which time the label on the button will change to display as "Show".

The job information displayed for each job in the list is:

EDocs

Last Receipt 5/19/2015 5:26:13 PM Generated Job ID: 00002248 Job No: 81380020 0817 PS ID: 90455824 MailOwner: n/a

Q Show

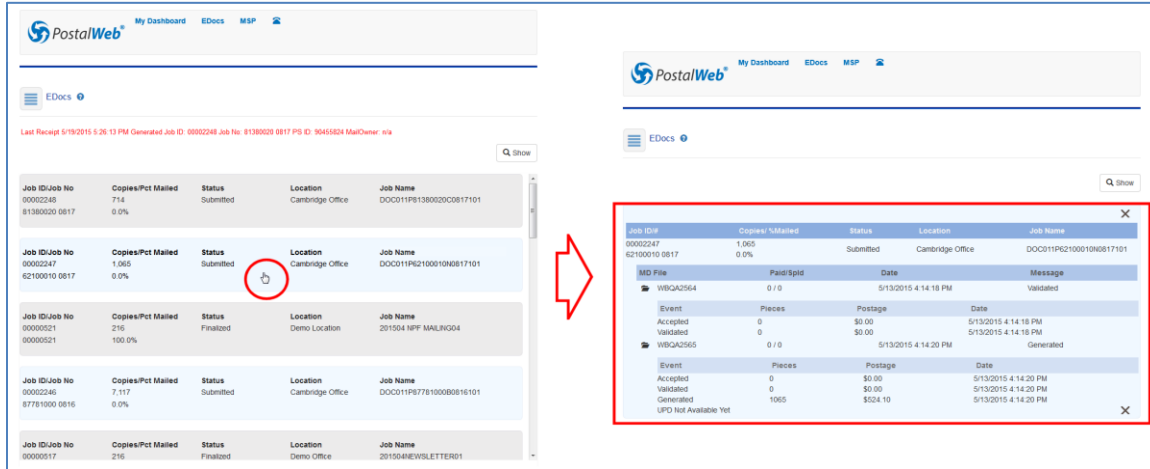
Job ID/Job No	Copies/Pct Mailed	Status	Location	Job Name
00002248	714	Submitted	Cambridge Office	DOC011P81380020C0817101
81380020 0817	0.0%			

- **Job ID/Job No:** Shows the Job ID and Job No. associated with the Mail.dat file;
- **Copies/Pct Mailed:** 'Copies' are the total piece count / the percent mailed. The percent mailed is based on the number of pieces in 'ready to pay containers' that have been successfully submitted to *PostalOne!*, but not necessarily finalized;
- **Status:** The summary of the status of the job as a whole. Since a single job may consist of multiple Mail.dat files, the Mail.dat files may be in different states as processing continues. Therefore, this is a rough status indicator. The possible status values are:
 - Submitted;
 - Partially Finalized; and
 - Finalized.

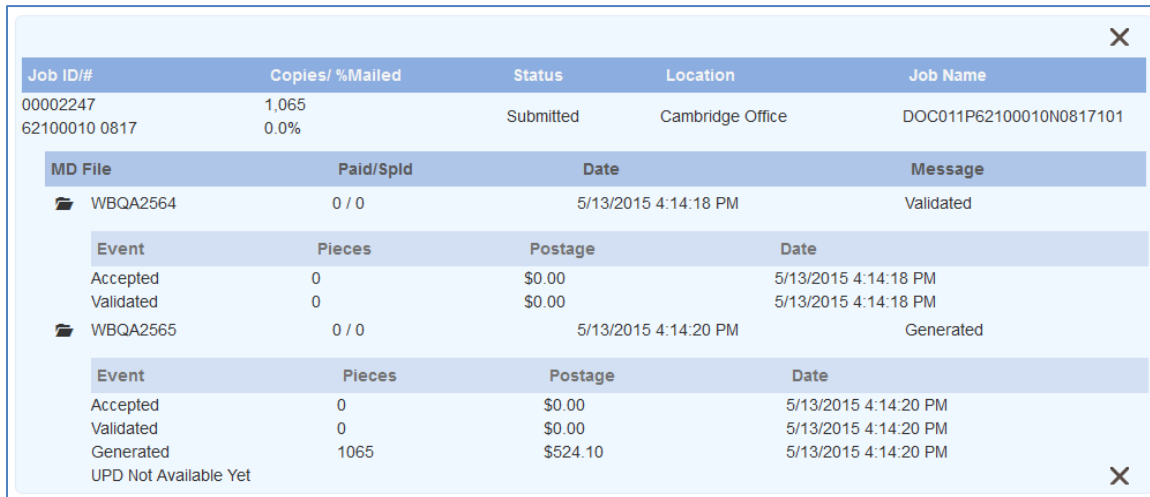
Using PostalWeb

- **Location:** One of the locations previously defined in the *Manage Locations* screen; and
- **Job Name:** A free-form description of the job.

The details of each job in the list can be viewed by single-clicking anywhere on a job's colored tile.



The detail screen shows all Mail.dat files associated with the job and their individual status.



The upper area is a copy of the summary shown in the main job list.

Job ID/#	Copies/ %Mailed	Status	Location	Job Name
00002247	1,065	Submitted	Cambridge Office	DOC011P62100010N0817101
62100010 0817	0.0%			

MD File	Paid/Spld	Date	Message																
WBQA2564	0 / 0	5/13/2015 4:14:18 PM	Validated																
<table border="1"> <thead> <tr> <th>Event</th> <th>Pieces</th> <th>Postage</th> <th>Date</th> </tr> </thead> <tbody> <tr> <td>Accepted</td> <td>0</td> <td>\$0.00</td> <td>5/13/2015 4:14:18 PM</td> </tr> <tr> <td>Validated</td> <td>0</td> <td>\$0.00</td> <td>5/13/2015 4:14:18 PM</td> </tr> </tbody> </table>				Event	Pieces	Postage	Date	Accepted	0	\$0.00	5/13/2015 4:14:18 PM	Validated	0	\$0.00	5/13/2015 4:14:18 PM				
Event	Pieces	Postage	Date																
Accepted	0	\$0.00	5/13/2015 4:14:18 PM																
Validated	0	\$0.00	5/13/2015 4:14:18 PM																
WBQA2565	0 / 0	5/13/2015 4:14:20 PM	Generated																
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Event	Pieces	Postage	Date																
Accepted	0	\$0.00	5/13/2015 4:14:20 PM																
Validated	0	\$0.00	5/13/2015 4:14:20 PM																
Generated	1065	\$524.10	5/13/2015 4:14:20 PM																
UPD Not Available Yet																			

The lower portion shows the details of each Mail.dat file associated with the job.

Job ID/#	Copies/ %Mailed	Status	Location	Job Name
00002247	1,065	Submitted	Cambridge Office	DOC011P62100010N0817101
62100010 0817	0.0%			

MD File	Paid/Spld	Date	Message																
WBQA2564	0 / 0	5/13/2015 4:14:18 PM	Validated																
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Event	Pieces	Postage	Date																
Accepted	0	\$0.00	5/13/2015 4:14:18 PM																
Validated	0	\$0.00	5/13/2015 4:14:18 PM																
WBQA2565	0 / 0	5/13/2015 4:14:20 PM	Generated																
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Event	Pieces	Postage	Date																
Accepted	0	\$0.00	5/13/2015 4:14:20 PM																
Validated	0	\$0.00	5/13/2015 4:14:20 PM																
Generated	1065	\$524.10	5/13/2015 4:14:20 PM																
UPD Not Available Yet																			

In the example above there are two Mail.dat files associated with the job.

For each Mail.dat file, the following data is shown:


- **MD File:** The name of the Mail.dat file;
- **Paid/Spld:** The number of pieces that were paid for / the number of pieces that were spoiled;
- **Date:** The date of the last event; and
- **Message:** The activity that happened at the last event.

For each event as the Mail.dat is processed, the following is shown:

- **Event:** The name of the event that took place. The possible events are:
 - Accepted;
 - Validated;
 - Generated; and
 - Finalized.
- **Pieces:** The number of pieces involved in the event;
- **Postage:** The total amount of postage for the event; and
- **Date:** The date and time of the event.


If the job has been ‘finalized’, there is usually a downloadable postage statement in PDF form along with the Postage Statement ID (PS ID) shown.

Job ID/#	Copies/ %Mailed	Status	Location	Job Name
00000521	216	Finalized	Demo Location	201504 NPF MAILING04
00000521	100.0%			

MD File	Paid/Spld	Date	Message
 00000521	216 / 0	5/12/2015 9:54:39 AM	Finalized

Event	Pieces	Postage	Date
Finalized	216	\$112.97	5/5/2015

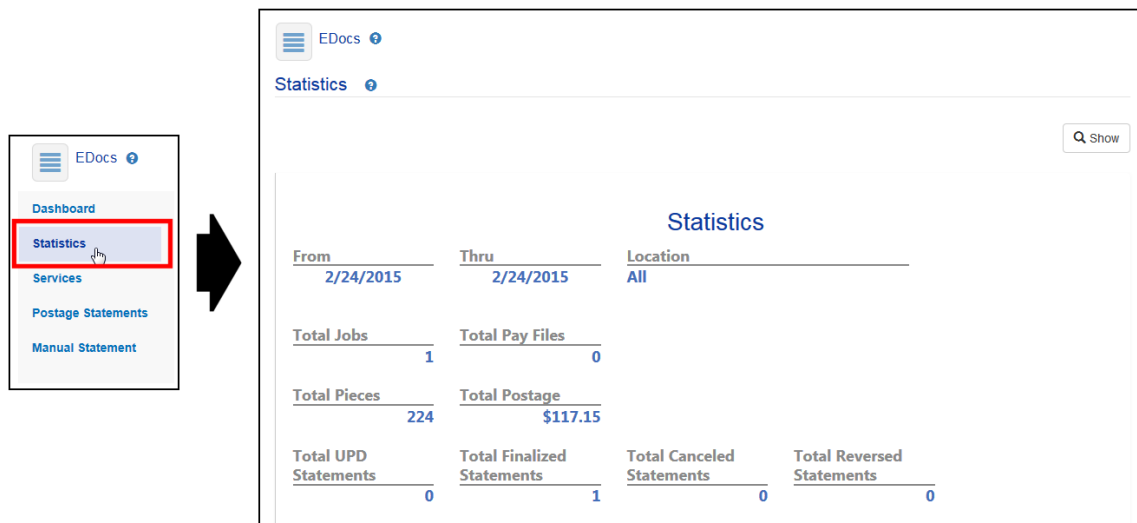
Download: **FIN** PS ID: 212415898 Permit: 55725

Clicking the **FIN** button icon () will retrieve the postage statement in PDF format and download it to the computer.

STATISTICS OPTION

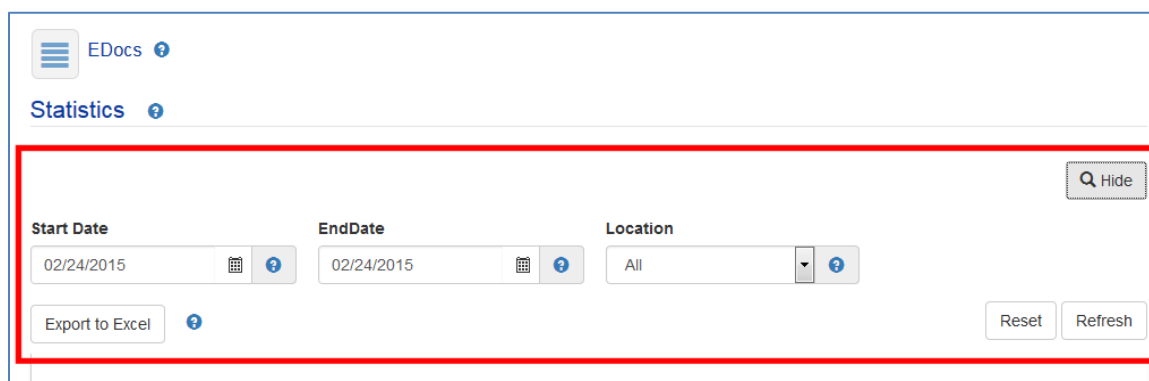
Role Access: ALL

The *Statistics* screen is displayed by clicking the 'Statistics' option in the EDocs side menu.



The *Statistics* page displays totals for a user-defined period of time, for a particular location (or all locations). The results can be exported to an Excel® spreadsheet.

The jobs that are compiled for the *Statistics* display are based on filter criteria that the user specifies. Click the **Show** button to view the available filters.



- **Start Date:** The first date that is to be included in the statistics display;
- **End Date:** The last date that is to be included in the statistics display; and
- **Location:** The single location to use to gather the statistics from, or 'All' locations.

i *The 'Location' selection will not be displayed when the user is only assigned a single location.*

i *Users assigned Administrator roles will always be able to select any or all locations.*



After the 'Start Date', 'End Date' or 'Location' settings are changed, the Refresh button must be clicked to update the displayed statistics. The Refresh button will turn blue in color when the displayed data is stale and the Refresh button needs to be clicked.

The data displayed on the *Statistics* screen is separated into two sections: Statistics; and Deliveries.

Statistics			
From	Thru	Location	
4/17/2015	5/19/2015	All	
Total Jobs	Total Pay Files		
17	2		
Total Pieces	Total Postage		
3,365	\$1,660.23		
Total UPD Statements	Total Finalized Statements	Total Canceled Statements	Total Reversed Statements
0	15	0	0

- **From:** The starting date to gather the statistics from (inclusive);
- **Thru:** The ending date to gather the statistics to (inclusive);
- **Location:** The Location to use (a single location or all locations);
- **Total Jobs:** The total number of jobs that were included in the statistics based on the settings;
- **Total Pay Files:** The total number of files that included a postage;
- **Total Pieces:** The total number of pieces included in the statistics;
- **Total Postage:** The dollar amount of postage for the period and location(s) specified;
- **Total UPD Statements:** The total number of UPD (USPS Processing Due) statements for the period and location(s) specified;
- **Total Finalized Statements:** The total number of Finalized statements for the period and location(s) specified;
- **Total Canceled Statements:** The total canceled statements for the period and location(s) specified; and
- **Total Reversed Statements:** The total reversed statements for the period and location(s) specified.

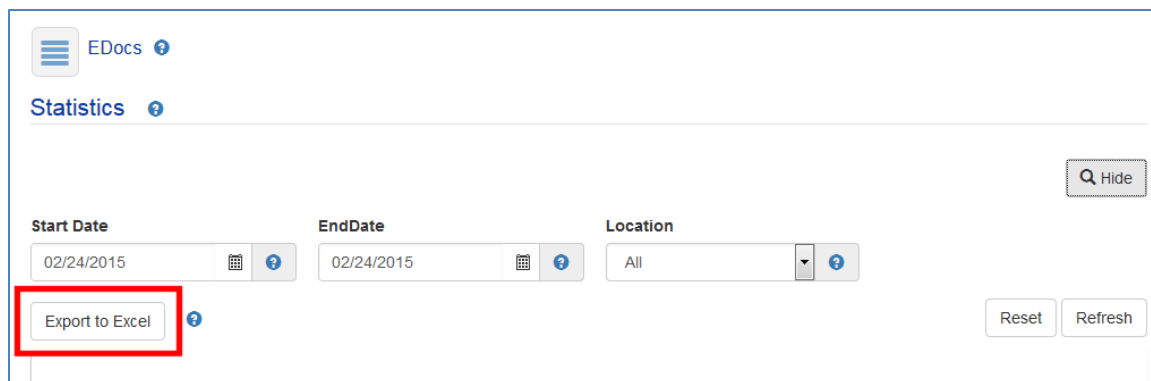
The 'Deliveries' section displays the total number of Emails and File Transfers that were delivered for the period and location specified, for each statement and file type.

Deliveries		
EMAILS	TRANSFERS	TOTALS
UPD Documents	UPD Documents	UPD Documents
0	0	0
Finalized Statements	Finalized Statements	Finalized Statements
83	83	166
Finalized XML Files	Finalized XML Files	Finalized XML Files
83	31	114
166	114	332

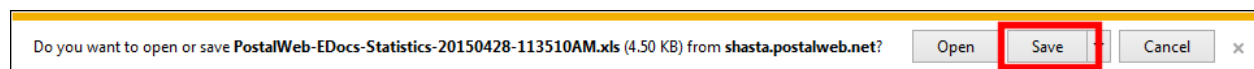
The **Export to Excel** button can be used to save the statistics in an Excel spreadsheet. The basic contents of the spreadsheet are the same as the data displayed on the *Statistics* page. This can be useful to compile reports with minimal effort.

To export the statistics to an Excel spreadsheet, perform the following:

1. Set the 'Start Date', 'End Date' and 'Location' settings as desired;
2. Click the **Refresh** button to make sure the data is updated to the current settings;
3. Click the **Export to Excel** button;



4. If prompted to 'Open' or 'Save' the file, select the option to 'Save' it :



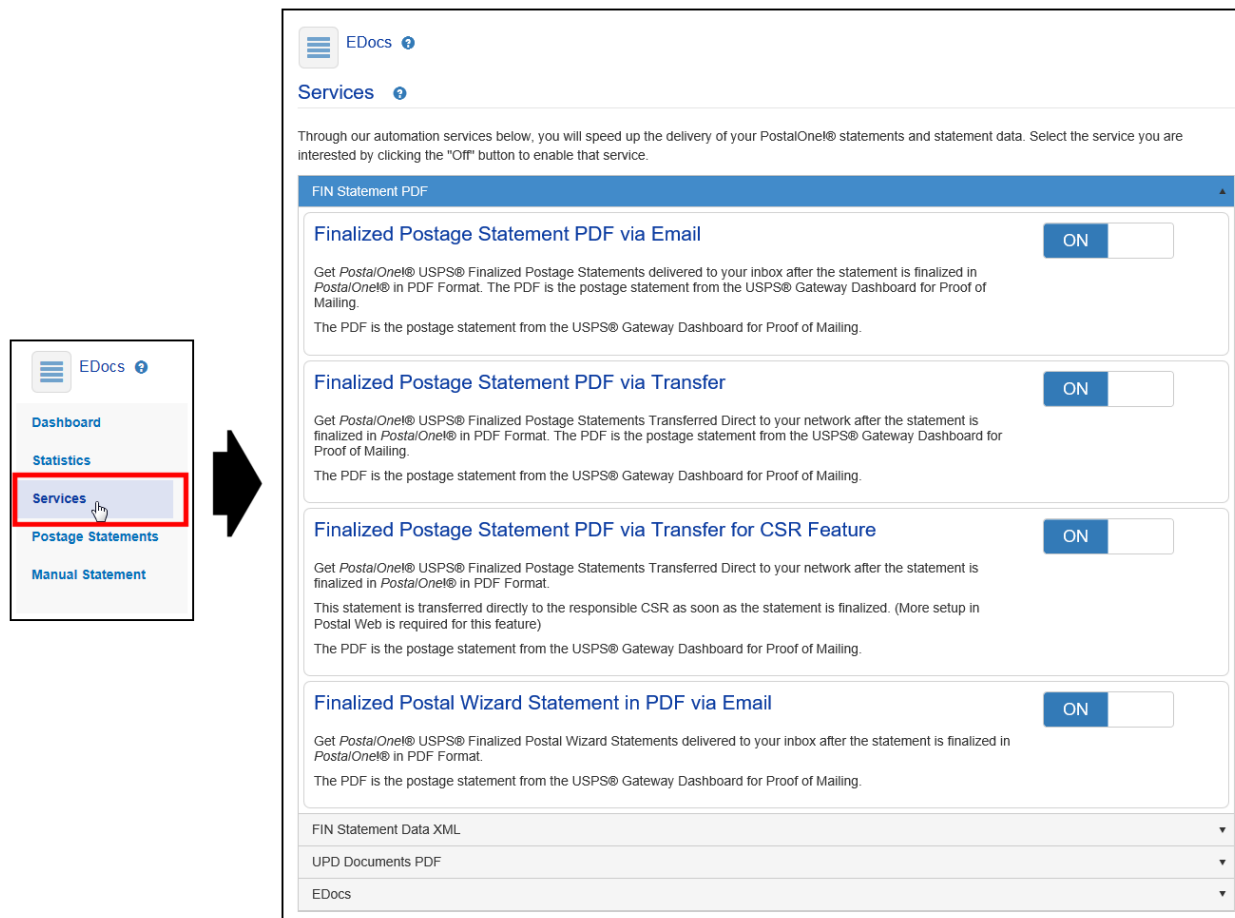
The statistics will be saved in an Excel spreadsheet. Shown below is an example of a spreadsheet generated from the *Statistics* screen shown above.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X
1	StartDate	EndDate	Location	TotalJobs	TotalPays	TotalPiece	TotalPasta	TotalUPDs	TotalFIn	TotalCANs	TotalREVs	EMailUPD	TransferUF	TotalUPDC	EMailFIND	TransferFIn	TotalFIND	EMailXML	TransferXV	TotalXMLD	EMailTotal	TransferTo	TotalDelivered	
2	4/17/2015	5/19/2015	All	17	2	3365	\$1,660.23	0	15	0	0	0	0	0	83	83	166	83	31	114	166	114	332	
3																								

SERVICES OPTION

Role Access: Company Admin

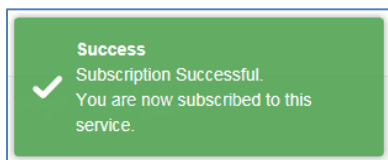
The *Services* page is displayed by selecting the ‘Services’ option from the EDocs side menu.



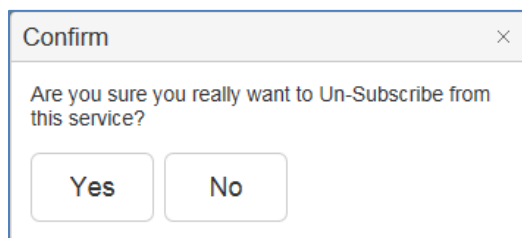
Services are generally in the form of automatic delivery of electronic statements, either to a pre-designated file folder on the MSP’s network, or via email as an attachment to subscribed users. The statements can be received in PDF and/or XML format.

Each service has its’ own, corresponding **ON/OFF** button. Clicking the **ON/OFF** button toggles between subscribed (‘ON’) and un-subscribed (‘OFF’) actions.

When a subscription is turned ON, a confirmation message will display.



When a subscription is turned OFF, a *Confirm* dialog is displays, asking the user to confirm that they wish to un-subscribe from the service. Click the **Yes** button to un-subscribe from the service (clicking the **No** button will cancel the un-scribe process, leaving the subscription turned ON).



After subscribing to a service(s) in the *Services* screen, each user intended to use the service(s) must have the 'EDocs' feature enabled for that user. This can be accomplished at the time of their invitation, or by through the [Manage Users option](#) in the [MSP menu](#). In addition, each user must then be selectively chosen to receive the individual service(s) the MSP is subscribed to.

! *If a statement transfer service is subscribed to, additional configuration is necessary in Window Book's MailDrop Engine software. A description of the configuration procedure is located in the "PostalWeb for Mail Service Providers Setup Guide", specifically the 'Folder Creation For Statement Delivery Service' section. The "PostalWeb for Mail Service Providers Setup Guide" is available on the Window Book web site at: <https://www.windowbook.com/Support/UserGuides>. Registration and/or login is required.*

i *If a statement email service is subscribed to, the requested file will be delivered as an attachment to the email address shown in the user's 'Member Profile'.*

Subscription services are separated into five categories in the *Services* screen: FIN Statement PDF; FIN Statement Data XML; UPD Documents PDF; 3rd Party; and EDocs. To view the services that make up each category, click anywhere on the category's title bar to expand it.

The subscription services for each category that are currently available (as of May 2017) are:

- ‘FIN Statement PDF’ Category:

FIN Statement PDF	
<p>Finalized Postal Wizard Statement in PDF via Email</p> <p>Get PostalOne!® USPS® Finalized Postal Wizard Statements delivered to your inbox after the statement is finalized in PostalOne!® in PDF Format.</p> <p>The PDF is the postage statement from the USPS® Gateway Dashboard for Proof of Mailing.</p>	<input checked="" type="checkbox"/> ON
<p>CSR Feature- Finalized Postage Statement PDF via Transfer</p> <p>Get PostalOne!® USPS® Finalized Postage Statements Transferred Direct to your network after the statement is finalized in PostalOne!® in PDF Format.</p> <p>This statement is transferred directly to the responsible CSR as soon as the statement is finalized. (More setup in Postal Web is required for this feature)</p> <p>The PDF is the postage statement from the USPS® Gateway Dashboard for Proof of Mailing.</p>	<input type="checkbox"/> OFF
<p>CSR Feature-Finalized Postage Statement PDF via E-Mail</p> <p>CSR Service Option for E-Mailing Statements to CSR's in lieu of CSR Transfer</p>	<input type="checkbox"/> OFF
<p>Finalized Postage Statement PDF via Email</p> <p>Get PostalOne!® USPS® Finalized Postage Statements delivered to your inbox after the statement is finalized in PostalOne!® in PDF Format. The PDF is the postage statement from the USPS® Gateway Dashboard for Proof of Mailing.</p> <p>The PDF is the postage statement from the USPS® Gateway Dashboard for Proof of Mailing.</p>	<input type="checkbox"/> OFF
<p>Finalized Postage Statement PDF via Transfer</p> <p>Get PostalOne!® USPS® Finalized Postage Statements Transferred Direct to your network after the statement is finalized in PostalOne!® in PDF Format. The PDF is the postage statement from the USPS® Gateway Dashboard for Proof of Mailing.</p> <p>The PDF is the postage statement from the USPS® Gateway Dashboard for Proof of Mailing.</p>	<input checked="" type="checkbox"/> ON
<p>FIN Statement Data XML</p>	
<p>UPD Documents PDF</p>	
<p>3rd Party</p>	
<p>EDocs</p>	

- **Finalized Postal Wizard Statement in PDF via Email:** Automatically emails Finalized Postal Wizard statements in PDF format to subscribed users;
- **CSR Feature – Finalized Postage Statement PDF via Transfer:** Automatically delivers Finalized postage statements in PDF format to a pre-designated network folder location. Statements are then transferred directly to the responsible CSR. This service is only displayed if previously enabled by Window Book;
- **CSR Feature – Finalized Postage Statement PDF via E-Mail:** Service for emailing finalized statements to CSRs. This service is only displayed if previously enabled by Window Book;
- **Finalized Postage Statement PDF via Email:** Automatically emails Finalized postage statements in PDF format to subscribed users; and
- **Finalized Postage Statement PDF via Transfer:** Automatically delivers Finalized postage statements in PDF format to a pre-designated network folder location.



For services that require enabling by Window Book, contact a Window Book Client Service Representative ([click here](#) for contact information).

- 'FIN Statement Data XML' Category:

The screenshot shows a web interface with a dropdown menu at the top containing 'FIN Statement PDF' and 'FIN Statement Data XML'. The 'FIN Statement Data XML' option is selected and highlighted with a red box. Below the dropdown are three toggle settings:

- Finalized Postal Wizard Statement in XML via Email**: OFF. Description: Get PostalOne!® USPS Finalized Postal Wizard Statements delivered to your inbox after the statement is finalized in PostalOne!® in XML Format. The XML Format will have information from the PDF Postage Statement that can be used for feeding other systems/programs in your company.
- Finalized Postage Statement XML via Email**: OFF. Description: Get PostalOne!® USPS® Finalized Postage Statements delivered to your inbox after the statement is finalized in PostalOne!® in XML Format. The XML Format will have information from the PDF Postage Statement that can be used for feeding other systems/programs in your company.
- Finalized Postage Statement XML via Transfer**: ON. Description: Get PostalOne!® USPS® Finalized Postage Statements Transferred Direct to your network after the statement is finalized in PostalOne!® in XML Format. The XML Format will have information from the PDF Postage Statement that can be used for feeding other systems/programs in your company.

Below these settings are three more dropdown menus: 'UPD Documents PDF', '3rd Party', and 'EDocs'.

- **Finalized Postal Wizard Statement in XML via Email:** Automatically emails Finalized Postal Wizard statements in XML format to subscribed users;
- **Finalized Postage Statement XML via Email:** Automatically emails Finalized postage statements in XML format to subscribed users; and
- **Finalized Postage Statement XML via Transfer:** Automatically delivers Finalized postage statements in XML format to a pre-designated network folder location.

- 'UPD Documents PDF' Category:

FIN Statement PDF	▼
FIN Statement Data XML	▼
UPD Documents PDF	▲
<p>USPS Processing Due Documents PDF via Email ON <input type="checkbox"/></p> <p>Get PostalOne!® Postage Processing Due Statements delivered to your inbox after the statement is generated in PostalOne!® in PDF Format.</p> <p>You will receive these documents when the statement has been generated in PostalOne!® - 1. USPS® Postage Statement before the USPS® has finalized it 2. USPS® Confirmation Page 3. USPS® Register Page</p>	
<p>USPS Processing Due Documents PDF via Transfer ON <input type="checkbox"/></p> <p>Get PostalOne!® Postage Processing Due Statements Transferred Direct to your network after the statement is finalized in PostalOne!® in PDF Format.</p> <p>You will receive these documents when the statement has been generated in PostalOne!® - 1. USPS® Postage Statement before the USPS® has finalized it 2. USPS® Confirmation Page 3. USPS® Register Page</p>	
3rd Party	▼
EDocs	▼

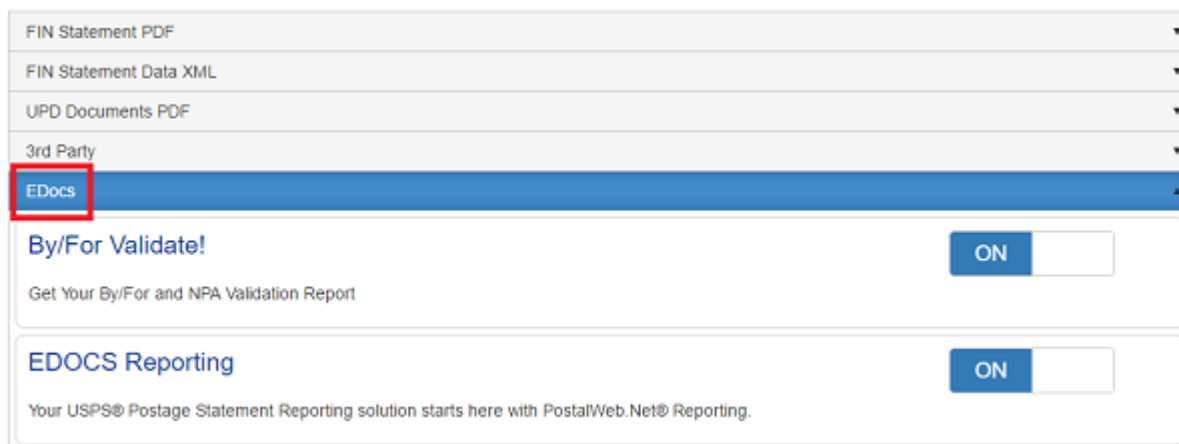
- **USPS Processing Due Documents PDF via Email:** Automatically emails USPS Processing Due documents in PDF format to subscribed users; and
- **USPS Processing Due Documents PDF via Transfer:** Automatically delivers USPS Processing Due documents in XML format to a pre-designated network folder location.

- '3rd Party' Category:

FIN Statement PDF	▼
FIN Statement Data XML	▼
UPD Documents PDF	▼
3rd Party	▲
<p>Bell & Howell Forensic Server Service ON <input type="checkbox"/></p> <p>Make it possible for the Bell & Howell Forensic Server to more accurately confirm or challenge USPS assessments for undocumented pieces and potentially other threshold violations.</p>	
<p>Midnight Finalized Postage Statement Transfer OFF <input type="checkbox"/></p> <p>Send your PostalOne!® postage statements data to Midnight.</p>	
EDocs	▼

- **Bell & Howell Forensic Server Service:** Makes it possible for the Bell & Howell Forensic Server to more accurately confirm or challenge USPS assessments for undocumented pieces and potentially other threshold violations. This service is only displayed if previously enabled by Window Book; and
- **Midnight Finalized Postage Statement Transfer:** Enables the MSP's postage statement data to be sent to the Virtual Systems Midnight Mail Management Service. The Midnight Finalized Postage Statement Transfer service is only displayed if previously enabled by Window Book.

- 'EDocs' Category:



The screenshot shows a dropdown menu with the following items: FIN Statement PDF, FIN Statement Data XML, UPD Documents PDF, 3rd Party, and EDocs. The 'EDocs' item is highlighted with a blue background and a red border. Below the menu, there are two sections with toggle switches. The first section is titled 'By/For Validate!' and has a blue 'ON' toggle switch. Below it is the text 'Get Your By/For and NPA Validation Report'. The second section is titled 'EDOCS Reporting' and also has a blue 'ON' toggle switch. Below it is the text 'Your USPS® Postage Statement Reporting solution starts here with PostalWeb.Net® Reporting.'

- **By/For Validate!:** Allows mailers to detect by/for conflicts or errors, including the identification of non-profit mail and validation of non-profit authorization numbers *before* they submit a file to *PostalOne!*. This reduces the time it takes mailers to get the Mail.dat files compliant with Full Service and Non-Profit requirements; as well as, the avoid and correct conflicts that result in assessments being levied when allowed thresholds are exceeded. This service must be enabled by Window Book and requires the installation and use of the By/For Validate utility on the MSP's server;



For more information on By/For Validate, refer to the "By/For Validate!™ Utility Installation & User Guide". The Guide is available on the Window Book web site at:

<https://www.windowbook.com/Support/UserGuides>. Registration and/or login is required.

- **EDOCS Reporting:** Enables the 'EDOCS Reporting' feature. When enabled, the feature will be displayed in each user's *Manage Users* detail screen (refer to the [Reporting](#) section for more information). This service is only displayed if previously enabled by Window Book; and

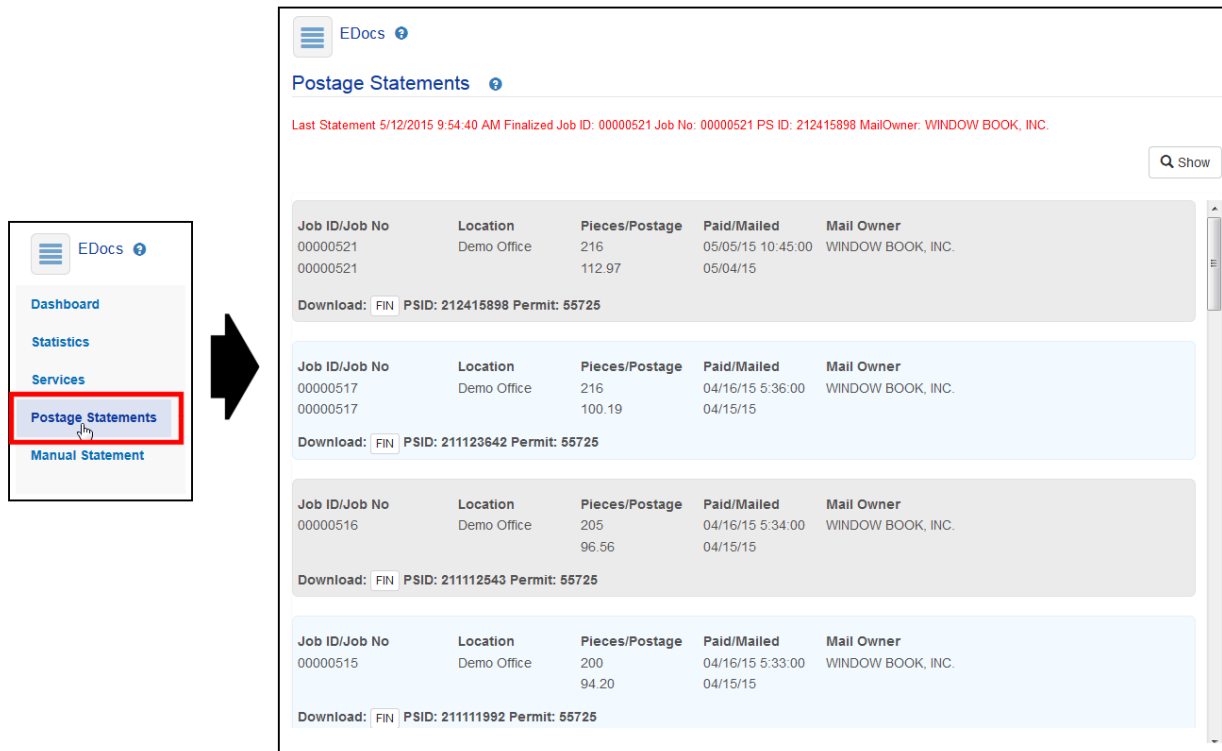


For services that require enabling by Window Book, contact a Window Book Client Service Representative (refer to the [Contact information](#) section in this Guide for more information).

POSTAGE STATEMENTS OPTION

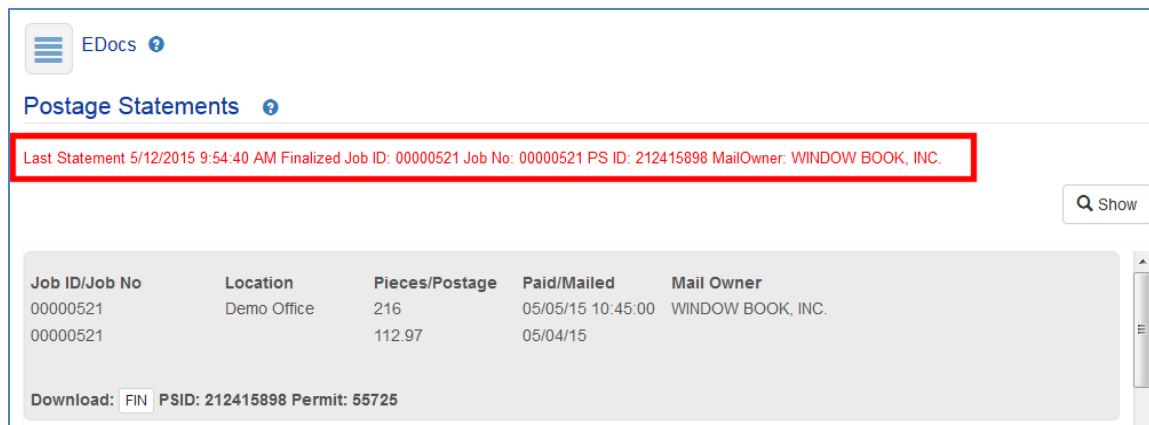
Role Access: ALL

The *Postage Statements* screen is displayed by selecting the 'Postage Statements' option from the EDocs side menu.



The *Postage Statements* screen displays the postage statements that have been generated by *PostalOne!*. The screen displays postage statements based on applied filters set by the user.

Just above the list of postage statements, message displays, either red or green in color, that alternates every 30 seconds between the latest submission to *PostalOne!* and the latest receipt from *PostalOne!*.



The postage statements listed are based on filters selected or set by the user. To display the available filters, click the **Show** button (click the **Hide** button to hide the displayed filters).

EDocs

Postage Statements

Last Statement 5/12/2015 9:54:40 AM Finalized Job ID: 00000521 Job No: 00000521 PS ID: 212415898 MailOwner: WINDOW BOOK, INC.

Hide

Start Date: 11/16/2015

Job ID: Job ID

Job No: Job No

PS ID: PS ID

Location*: All

Permit Number: Permit Num

Mail Owner: [Dropdown]

Reset Refresh

Job ID/Job No	Location	Pieces/Postage	Paid/Mailed	Mail Owner
00000521	Demo Office	216	05/05/15 10:45:00	WINDOW BOOK, INC.
00000521		112.97	05/04/15	

Download: FIN PSID: 212415898 Permit: 55725

- **Start Date:** The date shown is the LAST date of the statements to be displayed (inclusive). Only statements with dates previous to the date shown will be displayed. Statements with dates after the date displayed will NOT be shown. This filter is not used if the Job ID, Job No or PS ID is used as a filter;



The Start Date value is limited to the previous 90 days.

- **Job ID:** Filters on a Job ID. Entering the entire Job ID string is not necessary; it is only necessary to enter as many leading characters as needed to filter the list as desired. Multiple statements may be displayed if the entire Job ID is not entered. The 'Start Date' is not used as a filter when this field is used;
- **Job No:** Filters on a Job Number. Entering the entire Job Number string is not necessary; it is only necessary to enter as many leading characters as needed to filter the list as desired. Multiple statements may be displayed if the entire Job Number is not entered. The 'Start Date' is not used as a filter when this field is used;



Any leading zeros must also be entered.

- **PS ID:** Filters on a 'Postage Statement Identification' number (PS ID). Entering the entire PS ID string is not necessary; it is only necessary to enter as many leading characters as needed to filter the list as desired. Multiple statements may be displayed if the entire PS ID is not entered. The 'Start Date' is not used as a filter when this field is used;
- **Location*:** This filter is always used. All locations or a specific location may be selected, depending on the locations assigned to the user;



The 'Location' selection will not be displayed when the user is assigned only a single location.

i *Users assigned Administrator roles will always be able to select any or all locations.*

- **Permit Number:** Used to filter displayed jobs by the permit number used; and
- **Mail Owner:** Used to filter by a specific mail owner. This is a pull down list that is automatically populated as the PostalWeb system processes statements.

i *Any time a filter is changed, the 'Refresh' button must be clicked to update the displayed jobs. The 'Refresh' button will turn blue in color when the displayed data is stale and the 'Refresh' button needs to be clicked.*

The information provided for each individual postage statement is as follows:

EDocs

Postage Statements


Last Statement 5/12/2015 9:54:40 AM Finalized Job ID: 00000521 Job No: 00000521 PS ID: 212415898 MailOwner: WINDOW BOOK, INC.

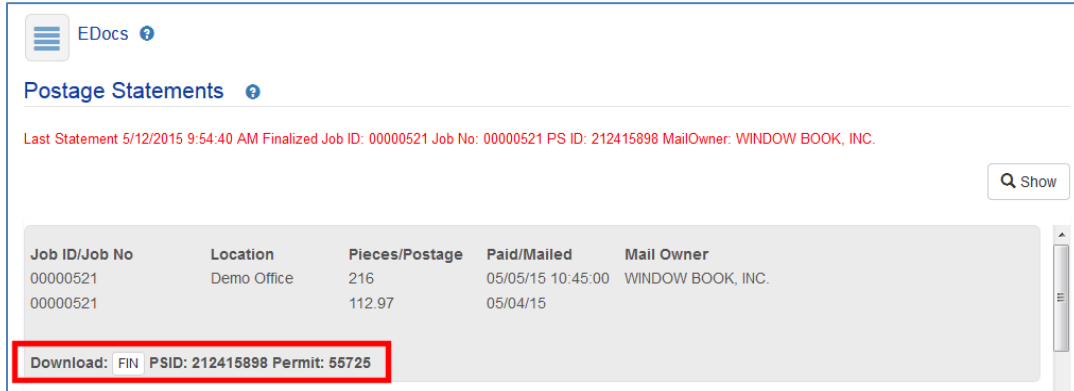
Search Show

Job ID/Job No	Location	Pieces/Postage	Paid/Mailed	Mail Owner
00000521	Demo Office	216	05/05/15 10:45:00	WINDOW BOOK, INC.
00000521		112.97	05/04/15	

Download: FIN PSID: 212415898 Permit: 55725

- **Job ID/Job No.:** The Job ID and Job No. associated with this postage statement;
- **Location:** The location where the submission originated from;
- **Pieces/Postage:** The number of pieces mailed / the amount of postage paid;
- **Paid/Mailed:** The date and time payment of postage was made / date the pieces were mailed; and
- **Mail Owner:** The name of the mail owner.

To view or download a PDF version of a specific postage statement, click the corresponding **FIN** button (). Clicking the **FIN** button will download the postage statement as a PDF file or display the document in the browser, providing the browser has a PDF reader installed as a plug-in. Also displayed is the associated Postage Statement ID (PS ID) as well as the permit number.



EDocs

Postage Statements

Last Statement 5/12/2015 9:54:40 AM Finalized Job ID: 00000521 Job No: 00000521 PS ID: 212415898 MailOwner: WINDOW BOOK, INC.

Show

Job ID/Job No	Location	Pieces/Postage	Paid/Mailed	Mail Owner
00000521	Demo Office	216	05/05/15 10:45:00	WINDOW BOOK, INC.
00000521		112.97	05/04/15	

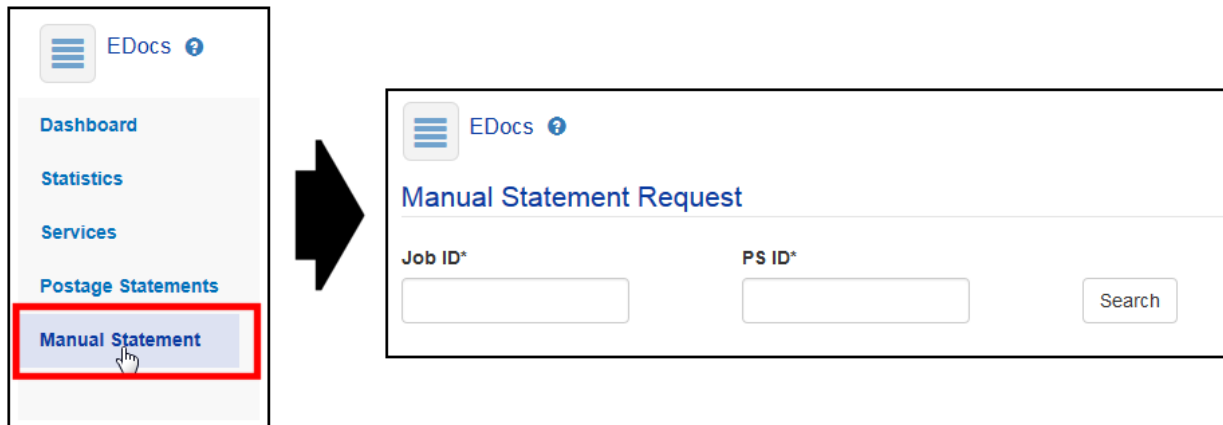
Download: **FIN** PSID: 212415898 Permit: 55725

 **The postage statement is in the form of a standard USPS Form 3602-R.**

MANUAL STATEMENT OPTION

Role Access: Company Admin

The *Manual Statement* screen is displayed by selecting the 'Manual Statement' option from the EDocs side menu.



EDocs

- Dashboard
- Statistics
- Services
- Postage Statements
- Manual Statement**

Manual Statement Request

Job ID* PS ID*

Search

To request a single postage statement manually, perform the following:

1. Enter the complete 'Job ID' and the 'PS ID' numbers (both values must be entered) and click the **Search** button;

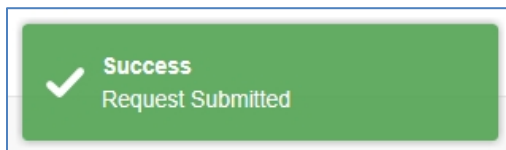
The screenshot shows the 'Manual Statement Request' form. At the top left is the 'EDocs' logo. Below it is the title 'Manual Statement Request'. A red box highlights the input fields for 'Job ID*' and 'PS ID*', and a 'Search' button.

2. The *Manual Statement Request Form* will display. If a postage statement that contains both the Job ID and the PS ID is found in the system, most of the fields on the form will be populated automatically. If the requested statement is not found in the system, the information must be entered manually (required fields are denoted by an asterisk '*');

The screenshot shows the 'Manual Statement Request Form' with populated fields. A red box highlights the form area. The fields are: Job ID* (00000510), PS ID* (223210013), Job Number* (MULTIPLETEST-04), Job Name* (201504NEWSLETTER), Submission Date (10/27/2015), Mail.dat File Name* (PWN03194), Copies* (9324), Total Pieces* (81205), Total Postage* (8935.58), Location* (Northern Division), P1 User ID* (P1 User ID), P1 Password* (P1 Password), and Confirm Password (Confirm Password). At the bottom are 'Submit Request' and 'Cancel' buttons.

- **Job ID*:** The Job ID;
- **PS ID*:** The Postage Statement Identification ('PS ID') number;
- **Job Number*:** The Job Number;

- **Job Name*:** The Job description contained in the Mail.dat file;
 - **Submission Date:** The date the Mail.dat file was submitted to *PostalOne!*;
 - **Mail.dat File Name*:** The Mail.dat file name that was submitted to *PostalOne!*;
 - **Copies*:** The total pieces mailed in the Mail.dat file;
 - **Total Pieces*:** The total pieces mailed in the Mail.dat file;
 - **Total Postage*:** The total postage charged in the transaction;
 - **Location*:** The location the Mail.dat file was submitted from; and
 - **P1 User ID*, P1 Password*, and Confirm Password:** The user must enter their *PostalOne!* credentials.
3. After the form is completed, click the **Submit** Request button. A confirmation message will display.



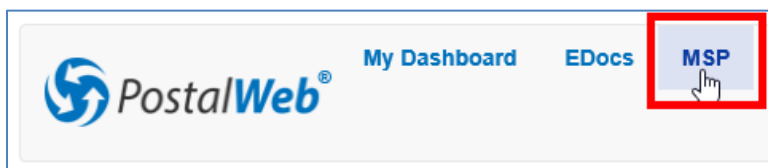
MSP Menu

Role Access: Administrator

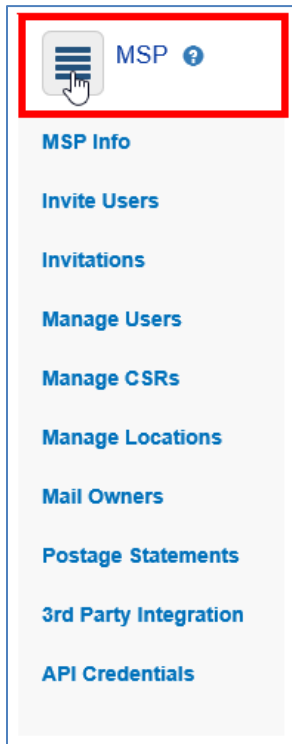
This category is for the management and maintenance of the overall PostalWeb site.

 **The 'MSP' menu will only be visible if the user logged in is assigned an Administrator role.**

Click the 'MSP' item on the top menu.



The main MSP screen will display. Click on the 'MSP' side menu icon to expand it, exposing further options.



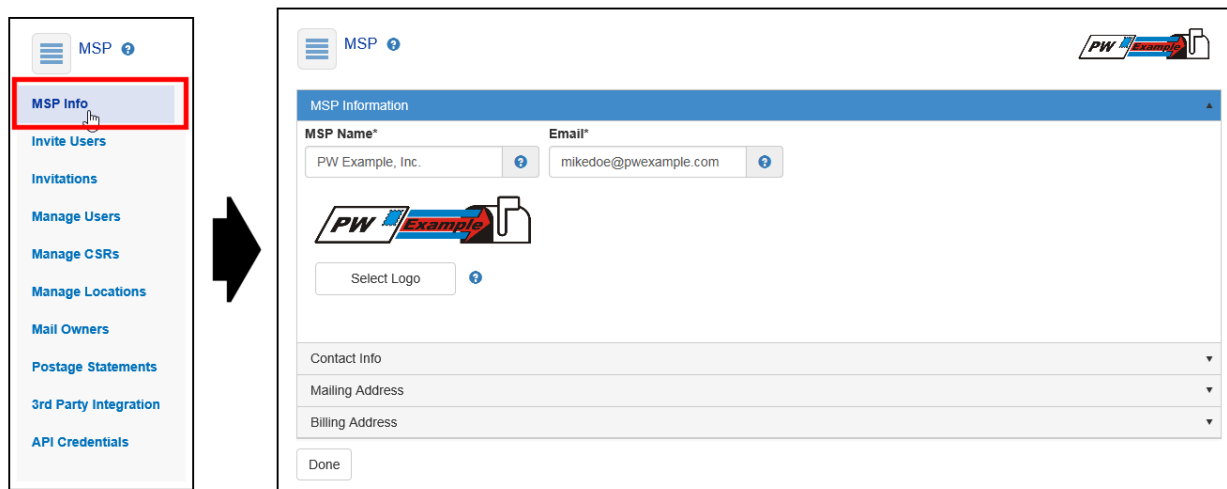
MSP INFO OPTION

Role Access: Company Admin

The *MSP Info* option allows the Administrator to edit the name, contact information, and addresses associated with the company the PostalWeb site is registered to.

Clicking the MSP Info option displays its' corresponding screen. This screen is also accessible simply by clicking the 'MSP' top menu. The screen that displays is the default screen for the MSP top menu.

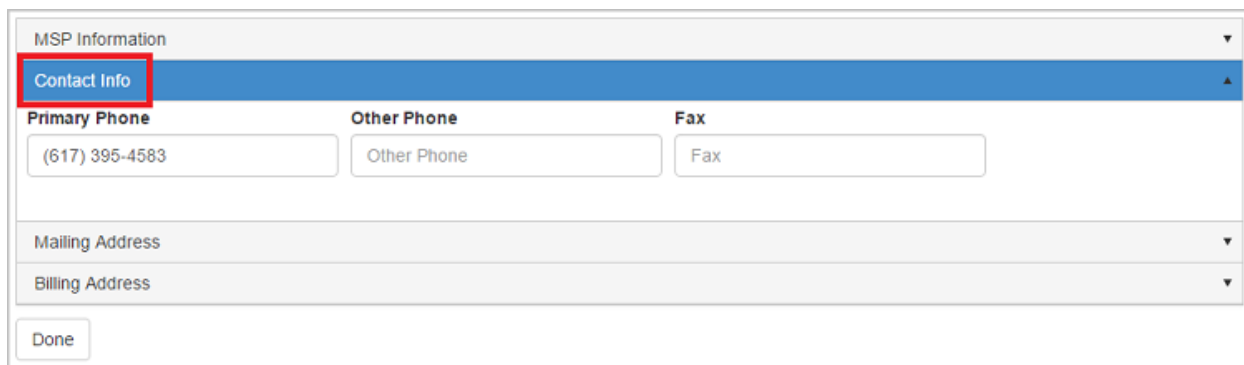
The screen is separated into four categories: MSP Information; Contact Info; Mailing Address; and Billing Address. Click anywhere in a category's title bar to select it. The category will expand, displaying its' contents.



- **MSP Information Category:**

- **MSP Name*:** The name of the MSP the PostalWeb site is registered to;
- **Email*:** Preferably the email address of a main contact at the MSP should the main Administrator be unavailable; and
- **Select Logo button:** Allows an image file of the MSP's company logo to be uploaded and used on the PostalWeb site. The logo will also be included on any email notifications generated by the site.

- **Contact Info Category:**



- **Primary Phone:** The primary or main phone number for the company (MSP);
- **Other Phone:** Any other pertinent, company-related phone number; and
- **Fax:** The MSP's company fax number.

- **Mailing Address Category:**

MSP Information

Contact Info

Mailing Address

Country
United States

Address 1*
300 Franklin St

Address 2
Street Address 2

City*
Cambridge

State*
MA

Zip Code*
02139

zip+4
zip+4

Mailing & Billing are the same* ?

Billing Address

Done



The address to be entered on this page should be the main address of the MSP company's corporate headquarters if the company has more than one location.

- **Country:** Select the country the MSP resides in using the pull-down menu (i.e. 'United States' or 'Canada'). This selection changes the display of some of the other fields as noted:
 - **United States:** Required fields will include:
 - **State*:** Select the State from the pull-down menu; and
 - **Zip Code*:** Enter the base 5-digit ZIP Code assigned to the MSP's location.
 - **Canada:** Required fields will include:
 - **Province*:** Select the Canadian province the MSP resides in from the pull-down menu selection; and
 - **Postal Code*:** Enter the Canadian postal code assigned to the MSP's location.
- **Address 1*:** Street address of the MSP's corporate headquarters;
- **Address 2:** Secondary street address, if necessary;
- **City*:** The city the MSP's corporate headquarters is located in; and
- **Mailing & Billing are the same*:** If the mailing and billing address are the same, set this option to 'ON'. When set to 'ON', the mailing information entered on this screen will be copied to the *Billing Address Category (below)*. Click the button to toggle between 'ON' () and 'OFF' ().

- **Billing Address Category:** If the option ‘Mailing & Billing are the same’ which is located within the “Mailing Address Category” (above) is set to ‘ON’, the fields in the “Billing Address Category” will automatically be populated.



If changing the Billing Address, the ‘Mailing & Billing are the same’ option should be set to ‘OFF’.

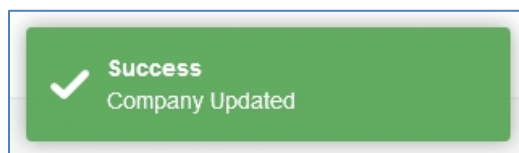
The screenshot shows a web form for entering billing address information. The form is titled "Billing Address" and is highlighted with a blue bar. It contains the following fields:

- Country:** A dropdown menu with "United States" selected.
- Address 1:** A text input field containing "300 Franklin St".
- Address 2:** An empty text input field.
- City:** A text input field containing "Cambridge".
- State:** A dropdown menu with "MA" selected.
- Zip Code:** A text input field containing "02139".
- Zip+4:** An empty text input field.

A "Done" button is located at the bottom left of the form.

- If the Billing Address information differs from the Mailing Address, enter the Billing Address information (required fields are denoted with an asterisk *). Refer to the “Mailing Address Category” for information on each available field, applying the billing detail pertaining to the MSP.

When all items have been entered or edited in the *MSP Info* categories, click the **Done** button at the bottom of the screen for the changes to take effect. A confirmation message will display:



Navigating away from the ‘MSP Infor’ screen before clicking the DONE button will result in the loss of any changes that have been made.

Adding A Company Logo

To add a company logo to be used on the PostalWeb site, perform the following:

1. Click the ‘MSP’ top menu;
2. In the *MSP Info* screen, select (click) the ‘MSP Information’ category (if not already displayed);
3. Click the **Select Logo** button;

- An *Open Windows Explorer* screen will display. Locate and select the logo's image file to be uploaded;

i **Supported file types include: .png; .jpg; .jpeg; .gif; and .bmp.**

- Click the **Open** button. PostalWeb will automatically re-size the file and display it on the site; and
- Click the **Done** button to save the changes.

! **Make sure to click the *DONE* button when finished. Navigating away from the 'MSP Info' screen without clicking the *DONE* button will result in the loss of any changes made.**

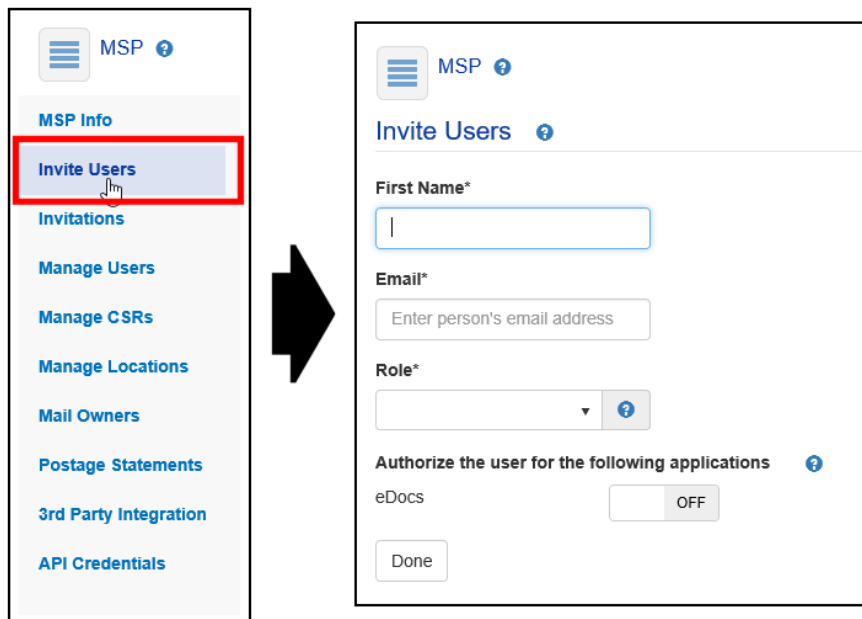
INVITE USERS OPTION

Role Access: Company Admin

Inviting users is the first step in bringing new users on-board to use PostalWeb. The invitation is in the form of an email to the prospective user. The email contains a link which the prospective user must click on. Doing so will open a new web page that includes an application the new user must complete before being allowed to log in to the PostalWeb site. At the same time an email will be sent to the person sending the invitation to advise that the invitation was accepted.

i **Users assigned a role of *Company Location manager* can also perform the same functions described here; however, the functionality is only accessible to them via the [Location menu](#). In addition, they are limited as to the roles they can assign to invited individuals. *Company Location Managers* are only able to assign roles of *Company Location Manager* or *Company Location User*.**

To display the *Invite Users* screen select the 'Invite Users' option in the MSP side menu.



To invite a new user, enter the required information (required fields are denoted with an asterisk *):

- **First Name***: The first name of the individual being invited;
- **Email***: The email address of the individual being invited. This is where the invitation will be sent; and
- **Role***: Select the role from the pull down list that will be assigned to the invited user. For list of the roles and their descriptions, please refer to the [ROLES](#) section in this Guide;
 - If a role is selected such as 'Location Manager' or 'Location User', all active locations will display. Assign what location(s) the invited individual will have access to by clicking the ON/OFF toggle button, changing the displayed value to ON. Multiple locations can be selected.

MSP ?

Invite Users ?

First Name*

Email*

Role*

Authorize for the following active location(s)

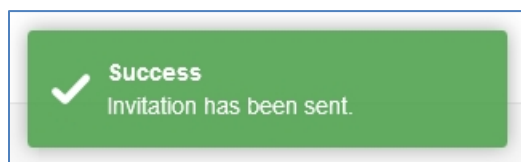
Eastern Division	<input type="checkbox"/> OFF	Northern Division	<input type="checkbox"/> OFF
Southern Division	<input type="checkbox"/> OFF	Western Division	<input type="checkbox"/> OFF

Authorize the user for the following applications ?

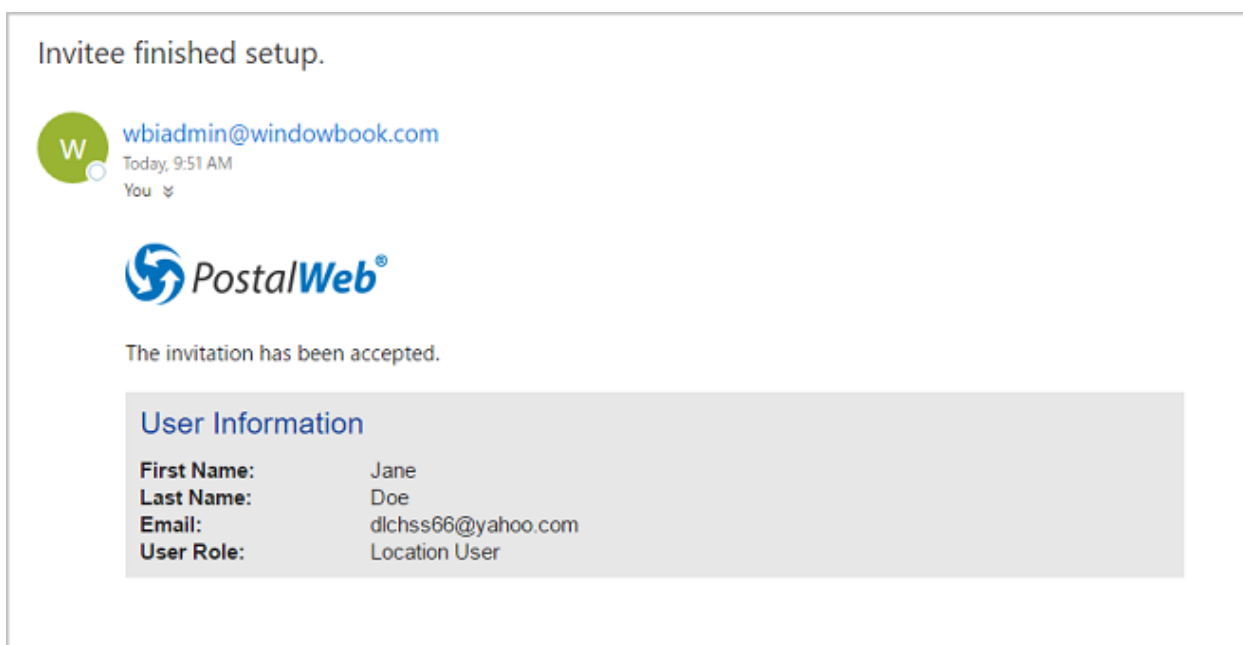
eDocs OFF

- **'Authorize the user for the following applications':**
 - **eDocs:** Set this option to 'ON' to authorize the invited individual to have access to the [EDocs menu](#) item and all the options associated with it, including being able to participate in subscription services as well.

When the necessary information is entered, click the **Done** button to send the invitation to the email address entered. A confirmation message will display.



The e-mail sent to the invited user contains a link that is to be used to confirm the invitation (refer to [New User Registration](#) for instructions on how to accept an invitation and become a PostalWeb user). When the invited individual completes the account setup process and clicks the **Register** button, the Administrator or Location Manager that invited the new user receives an e-mail notifying them that the invitation has been accepted.



Sent invitations that have not yet been replied to are displayed in a list (refer to the [Invitations Option](#) section in this Guide for more information). When an invited user completes the registration process, the invited user's name is automatically removed from the list.

New User Registration

Invitations to become a user of a company's PostalWeb site are issued by a Company Admin, and are sent via e-mail to the invited user. Within the e-mail invitation is an "Account Setup" link that the invited user must click to accept the invitation and begin the process of becoming a user of their company's PostalWeb site.



If the e-mail invitation gets delivered to a spam or junk folder, the "Account Setup" link may not work. Move the e-mail invitation to the Inbox before attempting to use the "Account Setup" link.

• Invitation from MSP Test Company, Inc.

• **wbiadmin@windowbook.com on behalf of MSP Test Company Inc <lburish@hotmail.com>** <wbiadmin@windowbook.com>
To: dlchss66@yahoo.com

This message contains blocked images. [Show images](#) [Change this setting](#)

MSP Test Company, Inc.
Jane,
Hey this is Laura Burish, I just set you up as a user in MSP Test Company, Inc.
Role: Location User
Click the link below to Get Started.

[Account Setup](#)

If you have any questions or problems, you can email me at lburish@hotmail.com

**You will NOT be able to Login before you setup your account
You must first setup your account by clicking the link above.**

For Your reference:
Invitation Key: c5e613db-2a33-4e97-8c18-b112eff5030d
MSP Test Company, Inc.
1060 W. Addison Street
Chicago, IL 60613

Do you have suggestions for new features in PostalWeb®?
Do you have suggestions on how we can improve our process?

If so, please click on the Contact Us link below and leave a comment.
[Contact Us](#)

This email is never sent without permission.

You are receiving this email because of your affiliation with PostalWeb.NET

When the "Account Setup" link is clicked, a web browser is launched on the invited user's computer or device and an *Invitation Account Setup* web page is displayed.

The invited user must fill in the fields, creating a user name and password for logging on to their company's PostalWeb site (required fields are indicated using an asterisk *).

Invitation Account Setup

Invitation Key Verification Completed Successfully. Please complete account registration below.

User Name*

?

Username can contain only Letters, Numbers and underscore '_', and must be at least 7 characters long

First Name*

Last Name*

Password*

Password must contain one special character Like: %!@, and must be at least 7 characters long

Confirm password*

Security Question*

Answer*

Confirm Answer*

Terms & Conditions

Terms of Use

AGREEMENT BETWEEN USER AND WINDOW BOOK, INC.

The postalweb.net Web site is comprised of various Web pages operated by Window Book. These Terms of Use explain the terms and conditions under which Window Book,

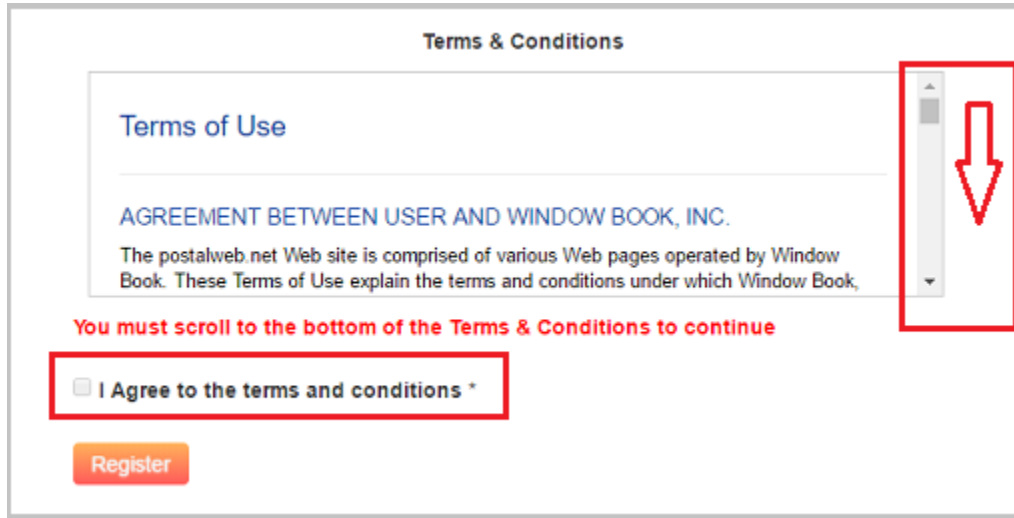
You must scroll to the bottom of the Terms & Conditions to continue

I Agree to the terms and conditions *

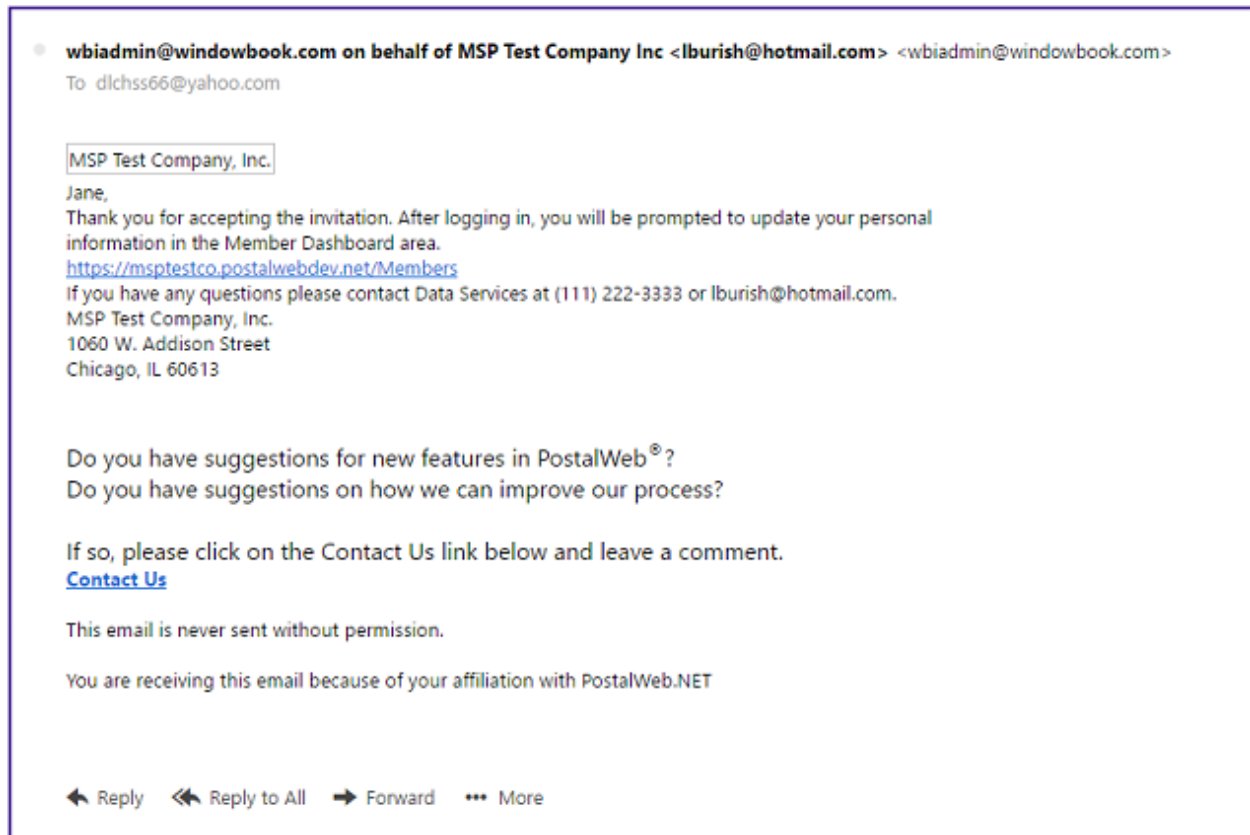
Register

When information for all of the required fields has been entered, the invited user must scroll to the bottom of the 'Terms of Use' window in order to enable the check box associated with the 'I Agree to

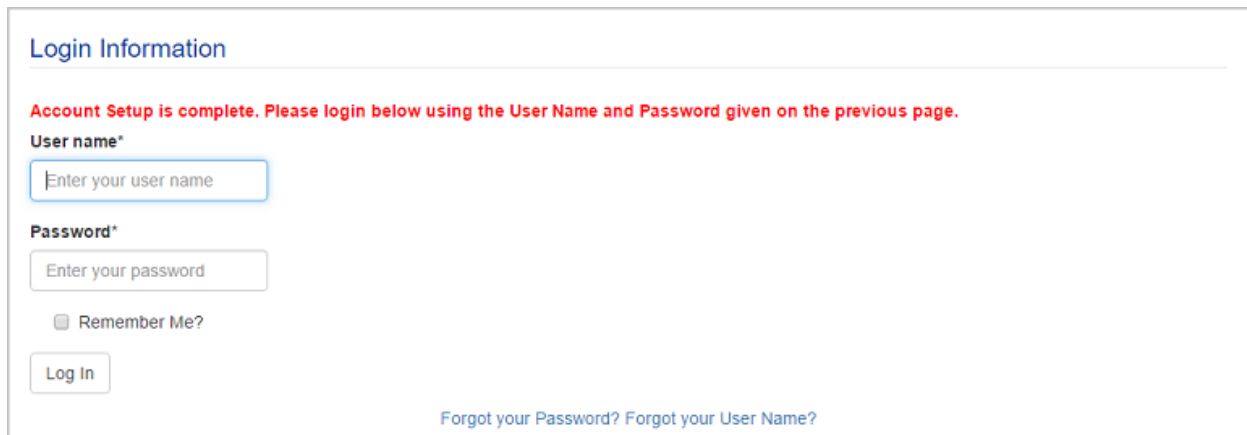
the terms and conditions'. After selecting (checking) the box, the invited user must click the **Register** button to complete the process.



When the **Register** button is clicked, an e-mail is sent from PostalWeb to the new user thanking them for accepting the invitation. The e-mail also provides the company-URL to their company's PostalWeb site.



In addition, the new user is returned to the *Login Information* screen in the web browser.



Login Information

Account Setup is complete. Please login below using the User Name and Password given on the previous page.


User name*


Password*

Remember Me?

[Forgot your Password?](#) [Forgot your User Name?](#)

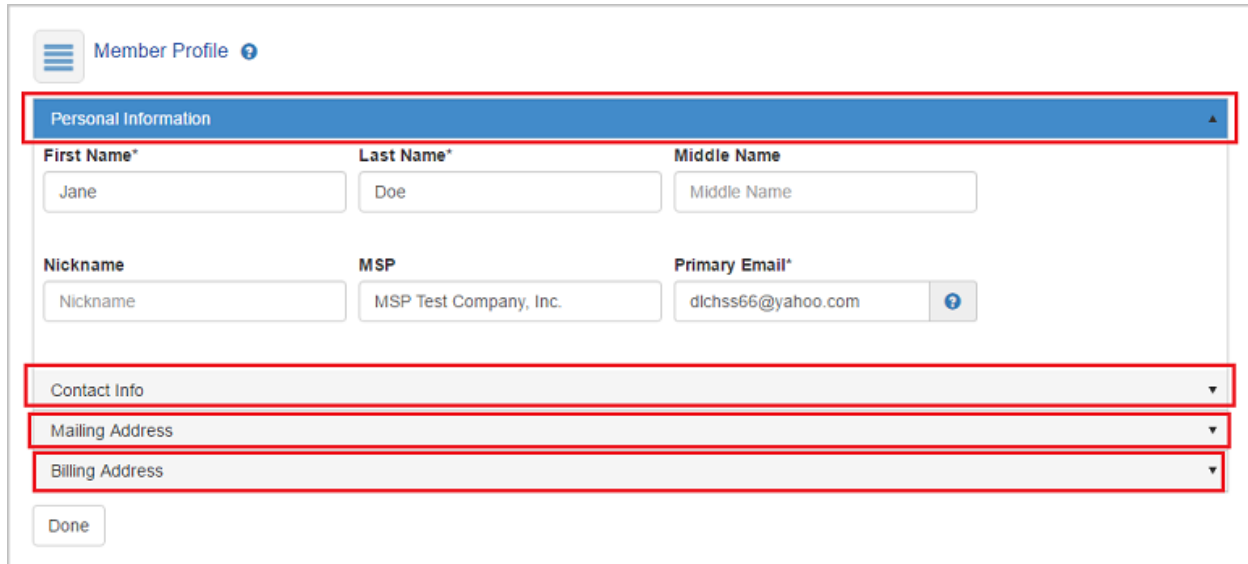
The new user should enter their 'User name' and 'Password', and then click the **Login** button.

 **Seven consecutive failed logins due to an incorrect password (but using a correct user name) will cause the account associated with the user name to become locked for 30 minutes. After at least 30 minutes has passed, attempt the login in again.**

 **For information on how to use the 'Forgot your Password?' feature, refer to [FORGOT YOUR PASSWORD?](#). For information on how to use the 'Forgot your User Name?' feature, refer to [FORGOT YOUR USER NAME?](#).**

A *Member Profile* screen will display. The new user must complete their Member Profile before the rest of the site will be available to them.

The Member Profile is comprised of four categories: 'Personal Information'; 'Contact Info'; 'Mailing Address'; and 'Billing Address'. The required information for each category must be entered to complete the Member Profile. To select a category and expand it to be able to view its contents, click on the category's title bar. The default view when the Member Profile page is displayed is the Personal Information category.



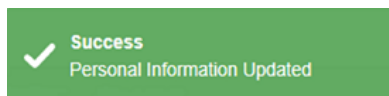
The screenshot shows the 'Member Profile' page. At the top, there is a 'Member Profile' header with a hamburger menu icon. Below it, the 'Personal Information' category is selected and expanded, highlighted with a blue bar. The form contains the following fields:

First Name*	Last Name*	Middle Name
Jane	Doe	Middle Name

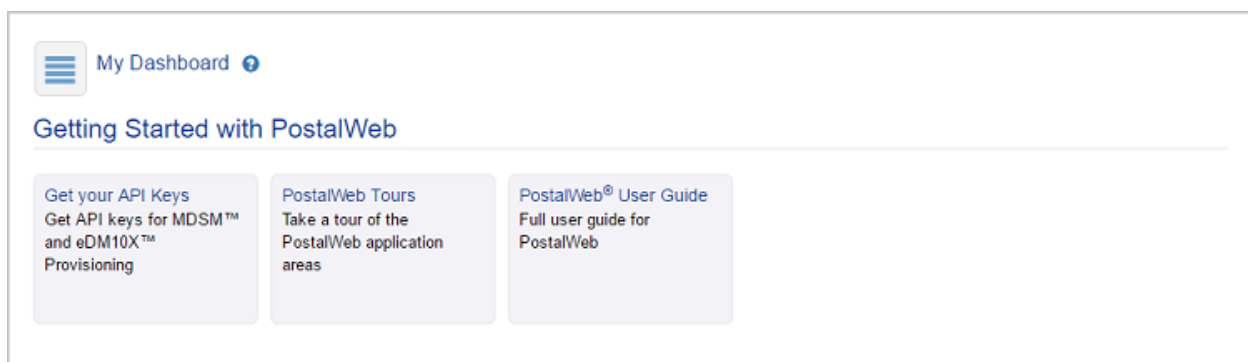
Nickname	MSP	Primary Email*
Nickname	MSP Test Company, Inc.	d1chss66@yahoo.com

Below the form, there are three expandable categories: 'Contact Info', 'Mailing Address', and 'Billing Address', each with a downward arrow. At the bottom left, there is a 'Done' button.

The new user must enter the necessary information in the required fields for each category before clicking the **Done** button. When the **Done** button is clicked, a *Success* dialog will display.



After the *Success* dialog displays, the new user will be taken directly to the *Getting Started with PostalWeb* page. The role that is assigned to the new user dictates what is shown when the *Getting Started with PostalWeb* page is displayed. In this particular instance, the new user was assigned a role of Location User; therefore, only the tiles 'Get Your API Keys', 'PostalWeb Tours' and 'PostalWeb® User Guide' are displayed/available (refer to [Getting Started Help](#) for more information on what each tile has to offer).

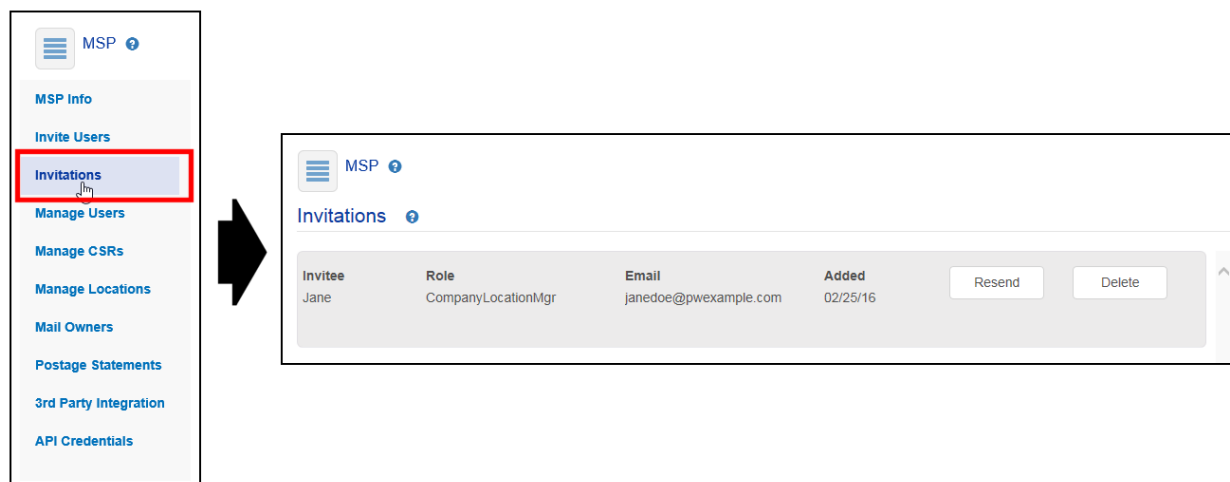


INVITATIONS OPTION

Role Access: Company Admin

An invitation initiated by a Company Admin generates an email to the invited individual. When the email invitation is sent, the invitation is also added to the list of invitations in PostalWeb that are waiting to be replied to. To see the list of pending invitations (i.e. invitations that have not been replied to), select the 'Invitations' menu option from the MSP side menu.

i *Users assigned a role of Company Location Manager also have access to the same functions described here; however, the functionality is only accessible to them via the [Location menu](#). In addition, they will only have visibility to those users who have access to the same location(s) that they do. A Company Location Manager does NOT have accessibility to those invitations that were to users assigned a role of Company Admin.*

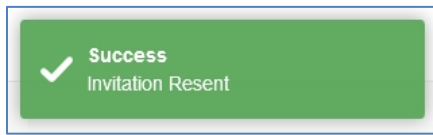


Each invitation line item contains the following information:

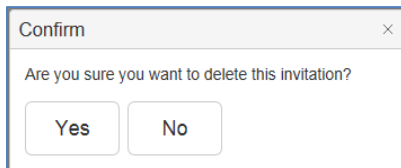
Invitee	Role	Email	Added	Resend	Delete
Jane	CompanyLocationMgr	janedoe@pwexample.com	02/25/16		

- **Invitee:** The first name of the invitee;
- **Role:** The Role assigned at the time the invitation was made;
- **Email:** The email address the invitation was sent to; and
- **Added:** The date the invitation was sent.

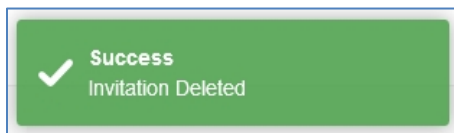
In addition, each invitation includes as a **Resend** button and a **Delete** button. If the **Resend** button is clicked, the invitation email is sent again to the same email address, and a confirmation message will display.



If the **Delete** button is clicked, a *Confirm* dialog box is displayed to confirm the user wishes to delete the invitation.

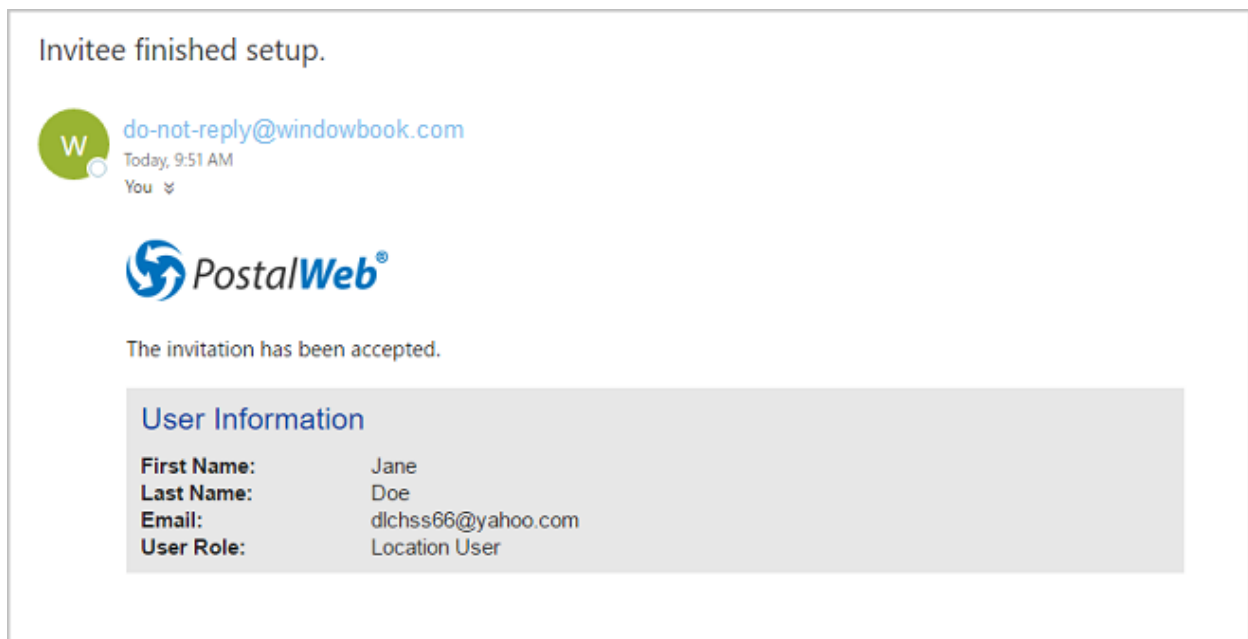


If the **Yes** button is clicked, the invitation will be deleted and a confirmation message will display.



If the **No** button is clicked the deletion process will be aborted and the invitation will not be affected.

When an invitation is accepted by the email recipient (i.e. invited individual), the invitation is automatically removed from the 'Invitations' screen by the system, and an email is sent to the person who initiated the invitation (i.e. the Company Admin), indicating the invitation was accepted.

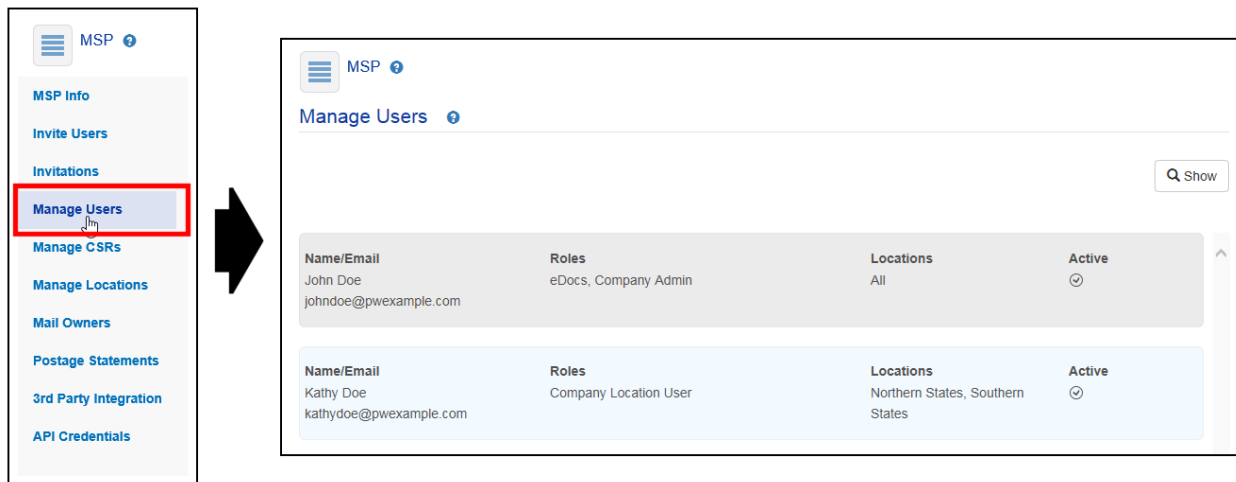


MANAGE USERS OPTION

Role Access: Company Admin

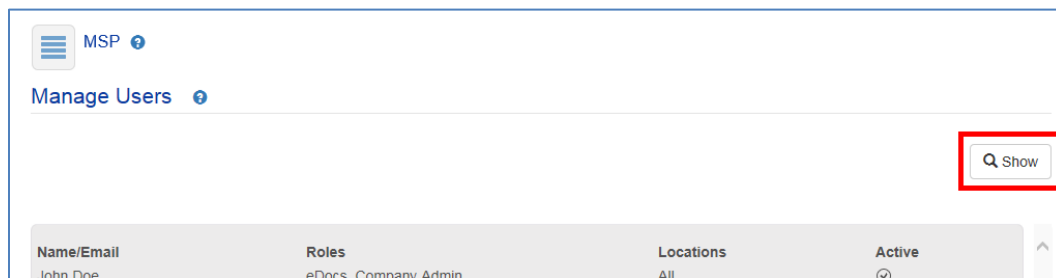
The *Manage Users* screen is displayed by clicking the 'Manage Users' option from the MSP side menu. This screen displays a list of the PostalWeb site's users. Users assigned a role of Company Admin can manage role assignment, location assignment, and subscribed services for each user from this screen.

i *Users assigned a role of Company Location Manager can also perform the same functions described here; however, the functionality is only accessible to them via the [Location menu](#). In addition, they are limited as to the users they can manage with this functionality. Company Location Managers are NOT able to apply this functionality to users assigned a role of Company Admin or who do not have access to the location(s) that the Company Location Manager has access to.*

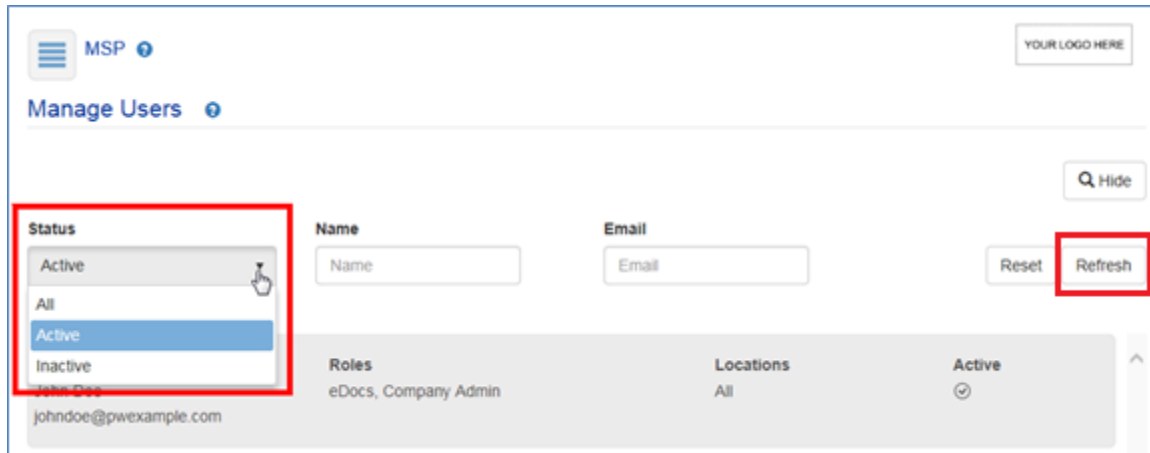


Users fall into one of two categories: Active; or Inactive. The default view of the *Manage Users* screen displays only active users. The view can be changed; however, to display all users (active and inactive) or only inactive users. To change which users get displayed:

- Click the **Show** button to view the available fields used for filtering users;



- Click on the 'Status' drop down menu to display the available user list options (i.e. 'All' (active and inactive); 'Active' (default); or 'Inactive'); and

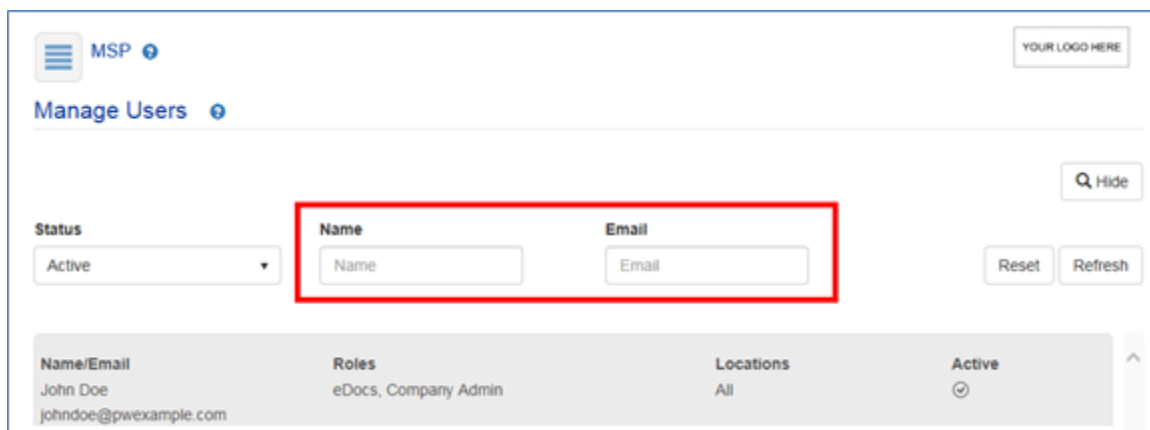


- Click the **Refresh** button to update the displayed user list (clicking the **Reset** button reverts all of the filters to their original settings).

To search for a specific user, use the 'Name' and/or 'Email' search fields. Once the value(s) is entered, click the **Refresh** button to initiate the search and update the display (clicking the **Reset** button reverts all of the filters to their original settings).



When searching by Name and/or Email, depending what the value the 'Status' field is set to, the user may not be found.



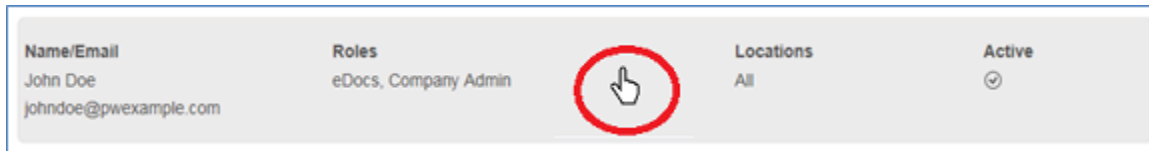
To update the display so that the filter and search fields do not display, click the **Hide** button..

Each displayed user's line item on the screen contains the following information:

- **Name/Email:** The name and email address as listed in the user's 'Member Profile';
- **Roles:** The current role(s) assigned to the user;
- **Locations:** The current location(s) assigned to the user; and

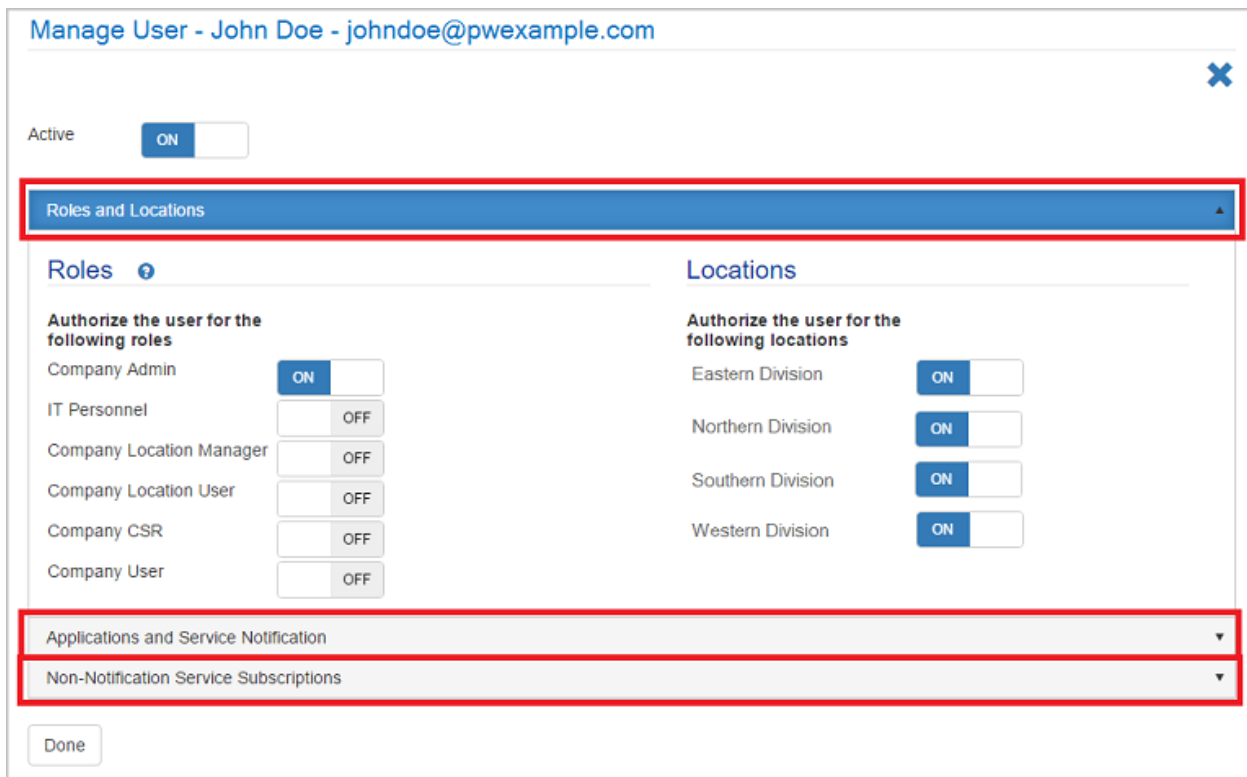
- **Active:** Whether the user is currently active (☑) or inactive (☒).

To view a user’s individual settings, single-click anywhere on that user’s colored tile.



The selected user’s details screen will display. Whether or not the user is Active (i.e. can log into the PostalWeb site), is managed from this screen. Click the toggle button to make the user Active (i.e. ON) or Inactive (i.e. OFF). In the image below, the user is set to Active.

In addition, the details screen is separated into three categories: Roles and Locations; Applications and Service Notification; and Non-Notification Service Subscriptions. To display the contents of a specific category, click on that category’s title bar on the screen. The default view for the details screen has the Roles and Locations category selected/displayed (see image below).



- **Roles and Locations:**
 - **Roles:** The assigned role(s) of the user can be changed by clicking the roles’ corresponding toggle button (i.e. ON/OFF). Selection of multiple roles is possible. Setting all roles to ‘OFF’ will still allow the user to log in, but they will essentially have the role of ‘Company User’; and

i For more information about each role and their accessibility to PostalWeb features, refer to the [ROLES](#) section in this Guide.

- **Locations:** The locations listed are those pre-defined MSP sites (i.e. locations) that were set up by a Company Admin in the "[Manage Locations](#)' option. Multiple locations may be selected (set to 'ON'). When a location is set to ON for a user (i.e. that user has access to that location), the location's job and statement information will be accessible to that user.

i A user should have at least one location selected.

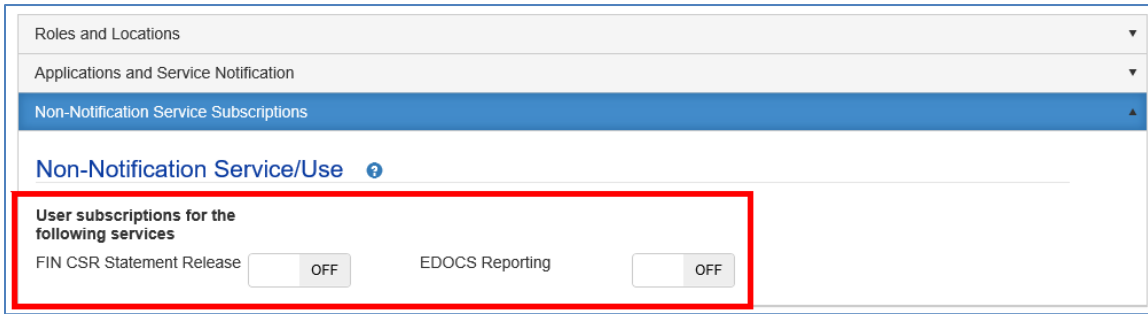
i Company Admins automatically have access to all locations.

- **Applications and Service Notification:**

The screenshot shows a web interface for configuring user roles. At the top, there is a breadcrumb trail: "Roles and Locations" > "Applications and Service Notification". The main content area is split into two panels. The left panel, titled "Applications", has the heading "Authorize the user for the following applications" and contains a single toggle for "eDocs" which is currently set to "ON". The right panel, titled "Service Notification", has the heading "User notification for the following services" and contains three toggles: "EDOCS Auto Statement PDF Email" (ON), "FIN Statement PDF Email" (OFF), and "UPD Documents PDF Email" (OFF).

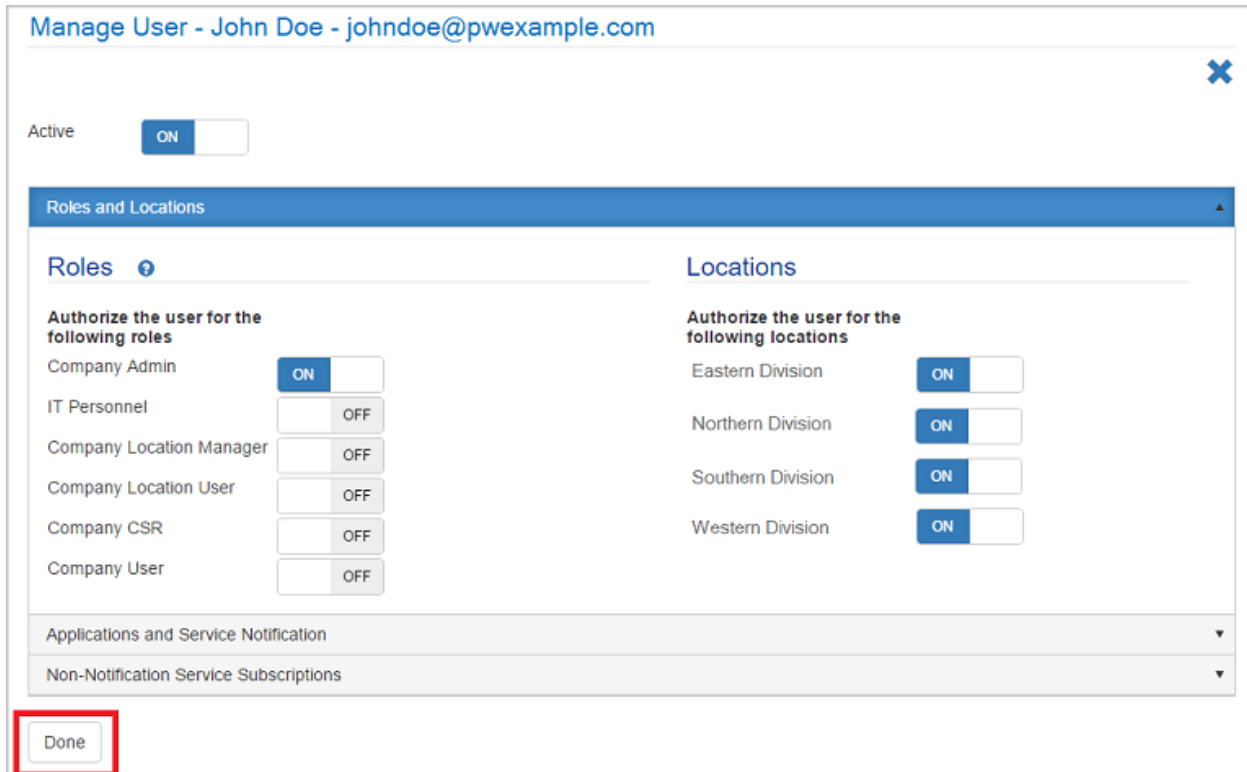
- **Applications:** The eDocs application can be activated or deactivated here (i.e. ON/OFF). When set to ON, the [EDocs top menu](#) and corresponding options will be accessible to the user, along with the ability to receive PostalWeb subscription services; and
- **Service Notification:** Notifications for any service(s) that are currently subscribed to can be turned ON or OFF by using the corresponding toggle button. Only those services that have been previously subscribed to in the EDocs menu > [Services option](#) will be displayed. If no services have been subscribed to, the 'Service Notification' heading will not display on this screen.

- **Non-Notification Service Subscriptions** (optionally displayed):

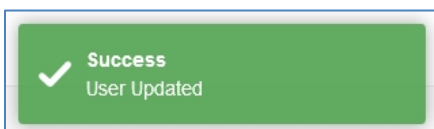



- **FIN CSR Statement Release:** A service to allow CSR's to manage the release of FIN (finalized) statements to mail owners. This service can be enabled or disabled here (i.e. ON/OFF) by clicking the toggle button; and
- **EDOCS Reporting:** Allows control of a user's access to the 'Reporting' top menu and its corresponding options. Click the toggle button to turn the access ON or OFF. Refer to the [Reporting](#) section in this Guide for more information.

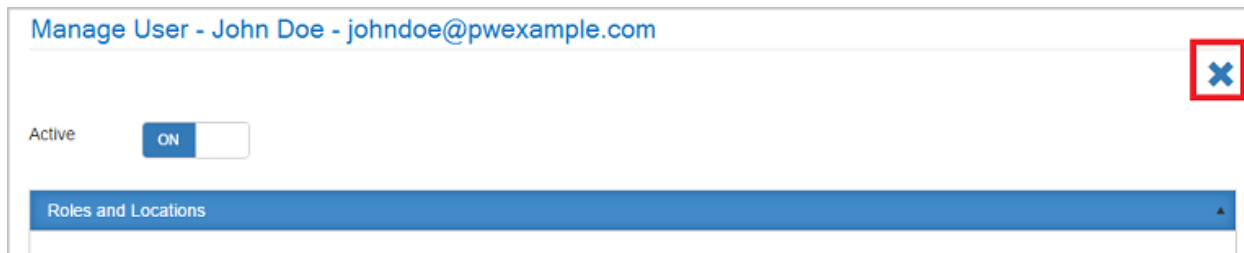
After making any changes, click the **Done** button.



A confirmation message will display.



Clicking the cancel icon () at any time will exit the details screen and any changes made to the existing settings will be lost.



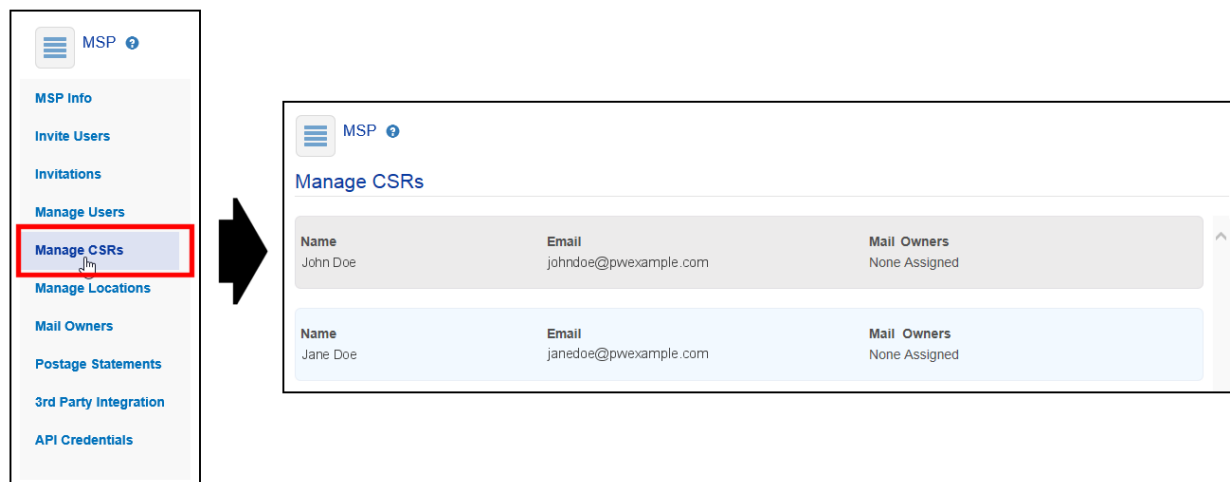
 **New users cannot be added here. For instructions on adding new users, refer to the [INVITE USERS OPTION](#) section in this Guide.**

MANAGE CSRS OPTION

Role Access: Company Admin

The *Manage CSRs* screen allows the assignment of specific mail owners to a Company CSR (Customer Service Representative). Subscription services pertaining to CSRs and their assigned mail owners can then be utilized.

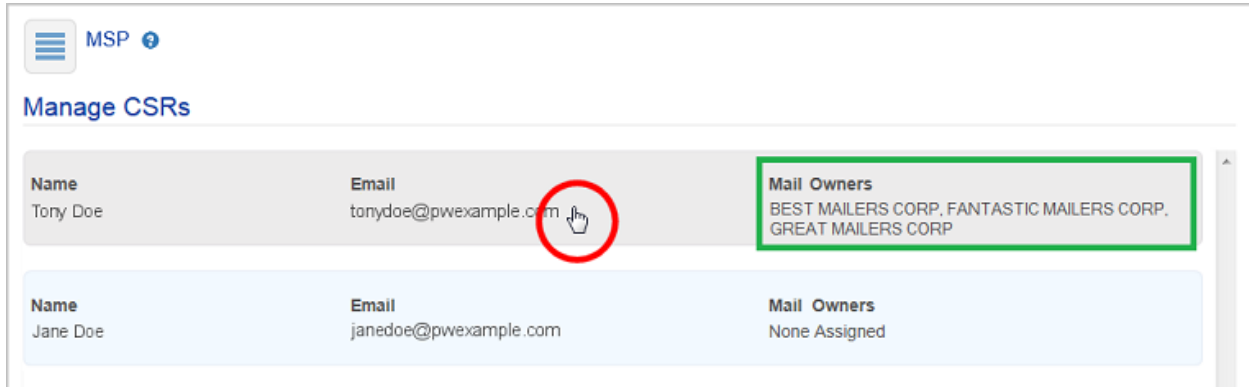
To see a list of an MSPs user(s) assigned a Company CSR role, select the 'Manage CSRs' option from the MSP side menu.



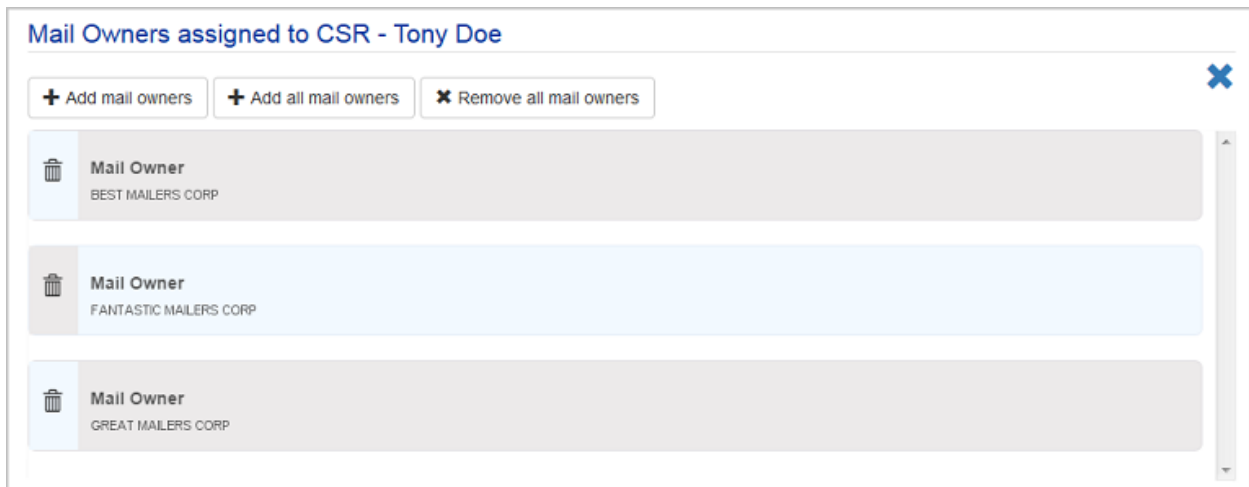
Each CSR's line item displays the following information:

- **Name:** The name of the CSR at the MSP;
- **Email:** The email address of the CSR at the MSP; and
- **Mail Owners:** The names of the mail owners currently assigned to the CSR.

A manageable list of the mail owners that are currently assigned to a specific CSR can be viewed by single-clicking anywhere on the colored tile of that CSR's line item.



The screen will update and display the list of mail owners. Within this screen, mail owners can be assigned to or unassigned from, the selected CSR either individually or all at once.

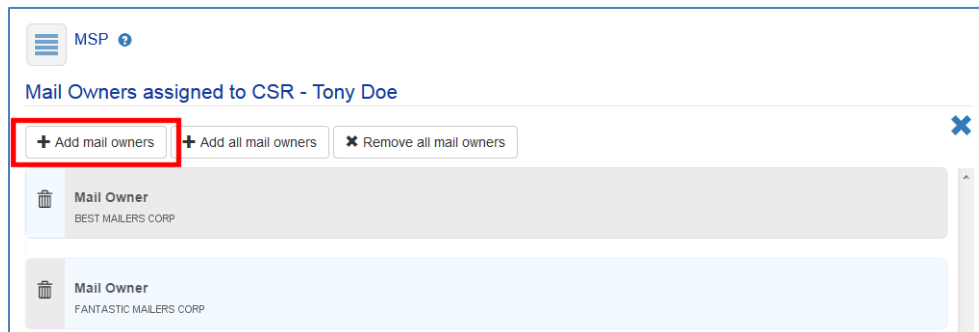


! To add or assign a mail owner(s) to a CSR, the mail owner must already be known to PostalWeb for the MSP. Refer to the MSP Menu > [Mail Owners Option](#) section in this Guide for more information.

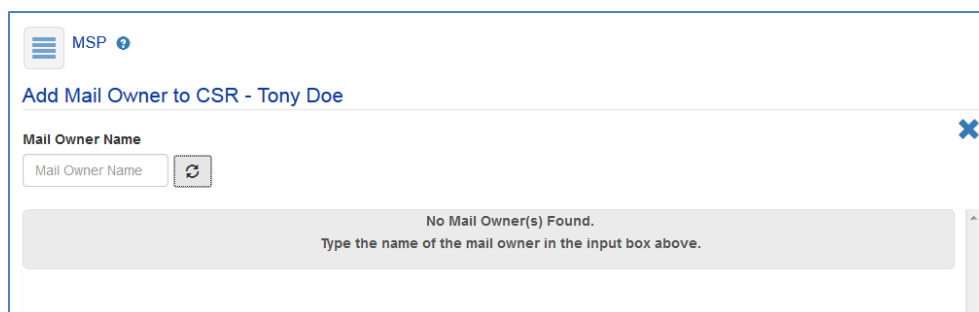
Assigning Mail Owners One At A time

To assign mail owners to a CSR one at a time, perform the following:

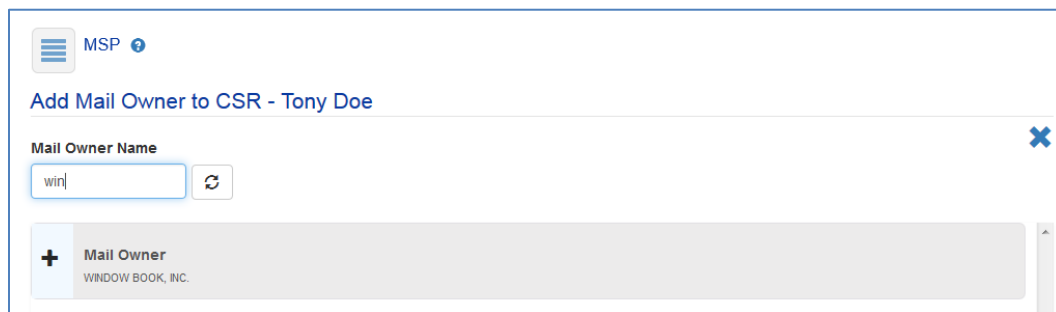
1. Click the **Add mail owners** button;



2. A new screen is displayed with an empty return results list;



3. To find the desired mail owner, click in the 'Mail Owner Name' search field and start to enter the name of the mail owner. As the name is being entered, the mail owners that are already known to PostalWeb for the MSP are automatically searched, and all matches are displayed;

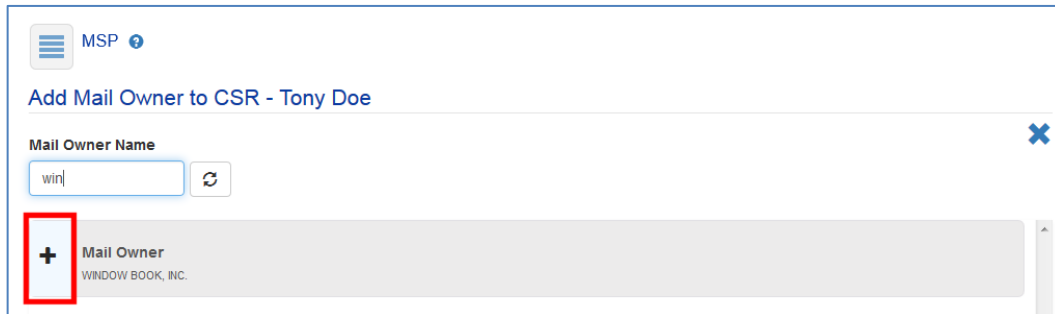


In the example above, as the text 'win' was entered, the search found a single mail owner that matched the entered text (i.e. 'WINDOW BOOK, INC.');

 **The refresh button**  **can be used to refresh the search/returned results, if necessary.**

Using PostalWeb

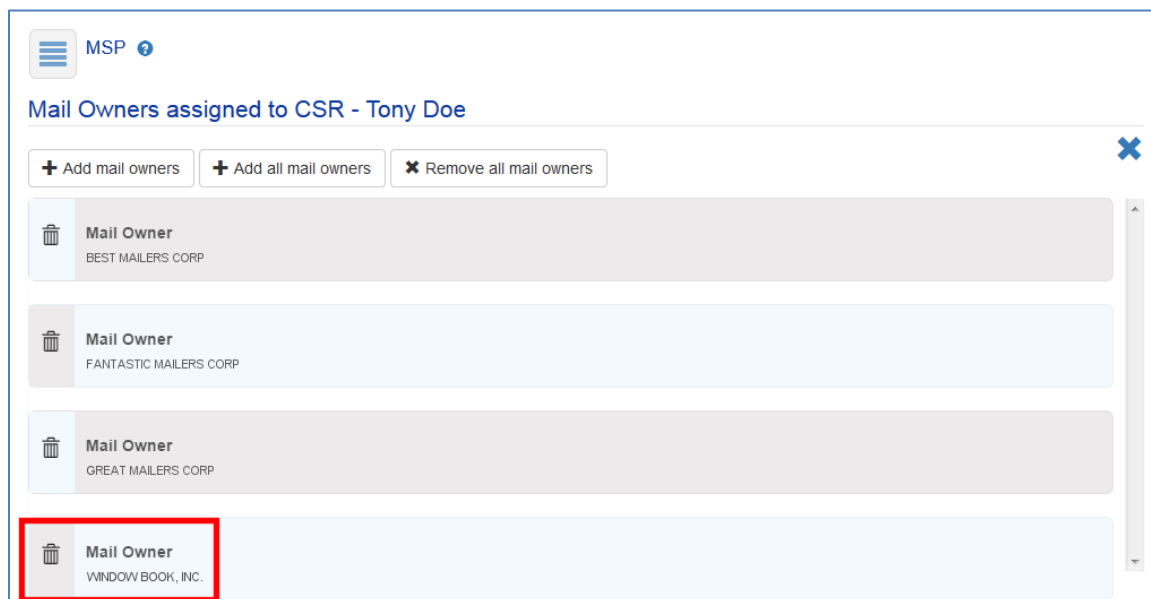
- When the desired mail owner is identified, click the corresponding plus sign (+) next to the mail owner's name to assign it the CSR;



The screen will revert to the original display for adding a mail owner;



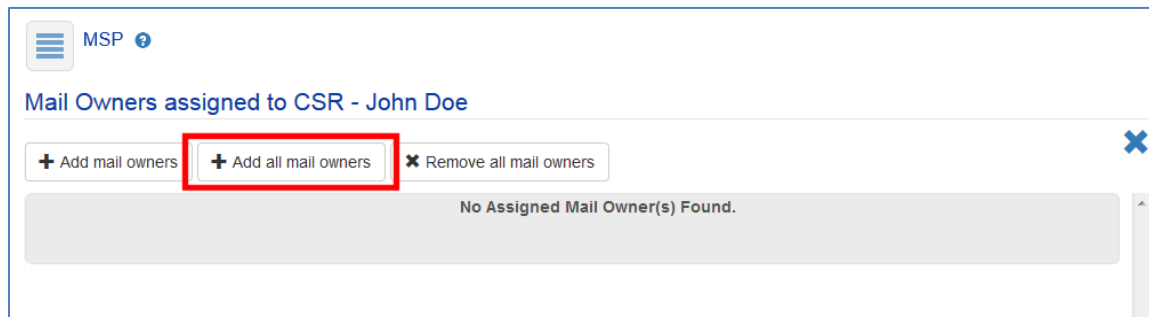
- Either begin the search for another mail owner to add or, to return to the CSR's list of mail owners, click the cancel icon ✕. The newly assigned mail owner will be included in the list;



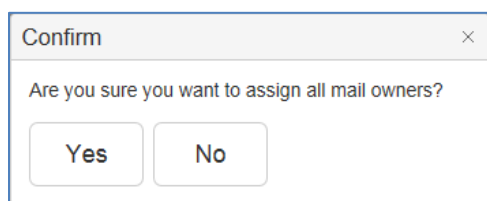
Assigning All Mail Owners

To assign all known mail owners to a CSR collectively, perform the following:

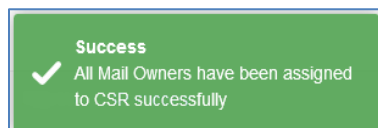
1. Click the Add all mail owners button;



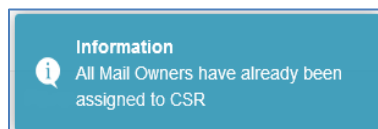
2. A dialog box will display asking to confirm the request. Click the **Yes** button to close the dialog and proceed with assigning all of the mail owners to the selected CSR (clicking the **No** button will close the dialog and abort the process);



When the **Yes** button is clicked, either a success dialog will display; or...



...if all of the existing mail owners have already been assigned and no additional mail owners were assigned as a result of the request, the following *Information* dialog will display.

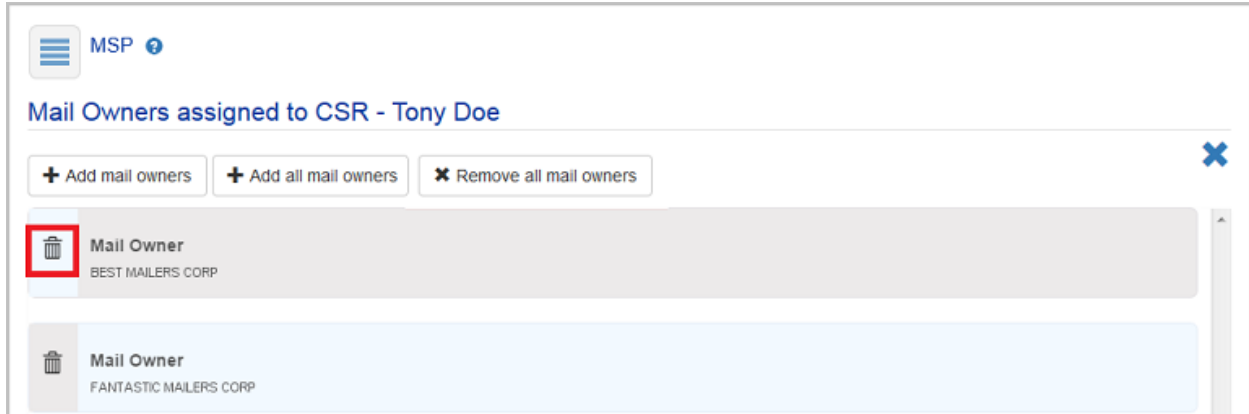



i *The 'Information' dialog is not an error, but is simply a notification that no additional mail owners are available to be assigned.*

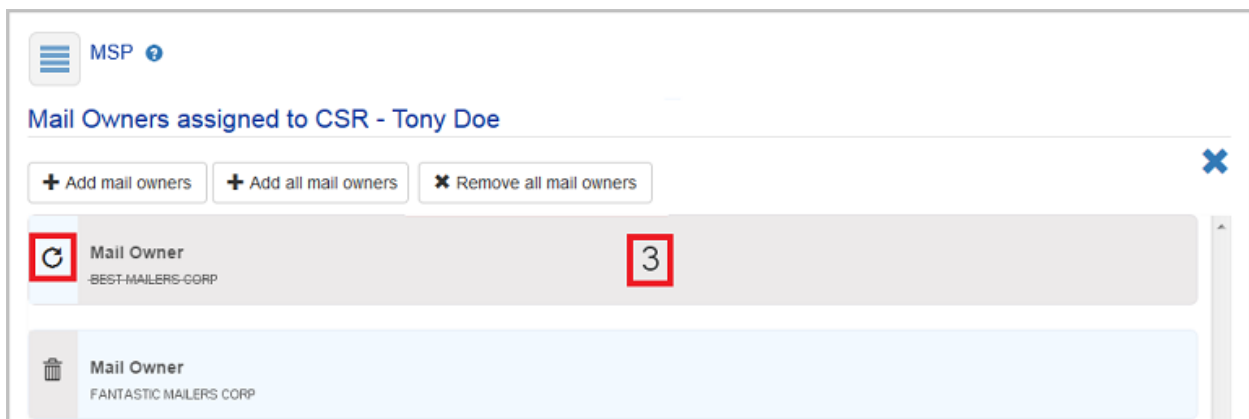
Un-assigning Mail Owners One At A Time

To un-assign mail owners from a CSR one at a time, perform the following:


- Click the corresponding trash can icon  located to the left of the mail owner's name;






- The icon is immediately replaced with an undo icon , the mail owner's name is crossed out, and a 3 second countdown timer starts (the timer is displayed in the mail owner line-item);



While the countdown timer is in progress, the undo icon may be clicked at any time to stop the process from completing. After the timer reaches zero, the mail owner's name is removed from the list of mail owners associated with the CSR (i.e. the mail owner is un-assigned).

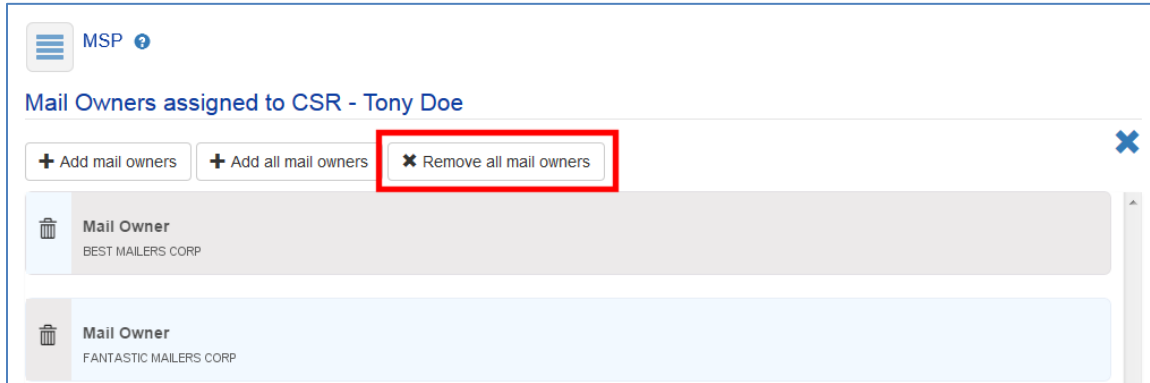
 ***The mail owner is only un-assigned from the selected CSR. Un-assigning a mail owner here will not delete it from the MSP's list of mail owners in PostalWeb. The mail owner can be added (assigned) again to the CSR at any time after being removed.***

 ***Clicking the cancel icon  while the timer is counting down will not stop the process of un-assigning the mail owner. The undo icon  must be clicked to stop the process of un-assigning the mail owner.***

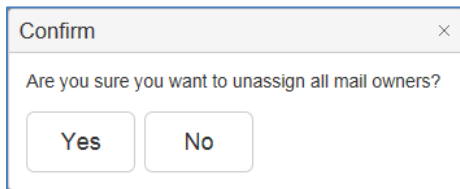
Un-assigning All Mail Owners

To un-assign all of the mail owners assigned to a CSR collectively, perform the following:

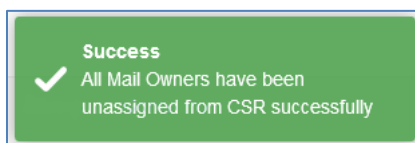
- Click the **Remove all mail owners** button:



- A *Confirm* dialog box will display. Click the **Yes** button to close the dialog and continue with un-assigning all of the mail owners (clicking the **No** button will close the dialog and abort the process).



After the **Yes** button is clicked, a *Success* dialog will display.



MANAGE LOCATIONS OPTION

Role Access: Company Admin

Select the 'Manage Locations' option from the MSP side menu to display the *Manage Locations* screen. The *Manage Locations* screen displays the list of available MSP locations. The management of these locations and the addition of new locations is performed from this screen by a Company Admin. Users with access to these locations (refer to [MANAGE USERS OPTION](#)) will have access to the job and statement information that pertains to each.



Each location must have a USPS-assigned CRID (Customer Registration Identification) number.


Name	CRID	Active	Provisioned	Location	Delete
Eastern Division	143684938	☑	⊗	MA 02139 -3781	Delete
Northern Division	125376453	☑	☑	WI 53027 -1010	
Southern Division	12345678	☑	⊗	FL 32113 -7491	
Western Division	121212184	☑	⊗	CA 90091 -3944	Delete

Each location's line item contains the following information:

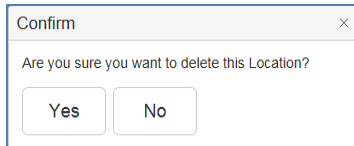
Name	CRID	Active	Provisioned	Location	Delete
Eastern Division	143684938	☑	⊗	MA 02139 -3781	Delete

- **Name:** The name of the MSP location;
- **CRID:** The USPS-assigned CRID number for this MSP location;
- **Active:** Whether this location is active (☑) or inactive (⊗);
- **Provisioned:** Whether this location has been provisioned (☑) or not provisioned (⊗) within Window Book's MailDrop Engine software; and
- **Location:** The state and ZIP Code this MSP location.

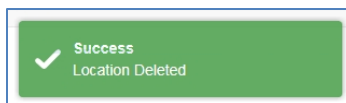
In addition, the line item for any additional locations added after the initial registration/creation of the MSP's PostalWeb site will contain a **Delete** button for removing or deleting the location in its entirety. The location created during the initial registration/creation of the MSP's PostalWeb site will not contain a **Delete** button.

 **Once a location is deleted, no information for that location will be displayed. An alternative is to 'de-activate' the location via the location editing screen (refer to [Editing a Location](#) below).**

When the **Delete** button is clicked, a *Confirm* dialog displays.

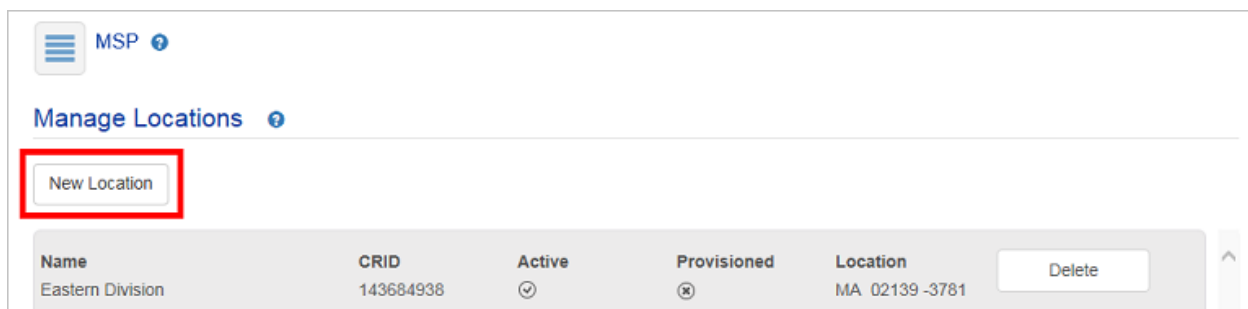


Click the **Yes** button to continue with the deletion process. When the deletion is complete, a confirmation message will display (clicking the **No** button will abort the deletion process and leave the location unchanged), and the *Manage Locations* screen will update accordingly.



Adding a New Location

To add a new location from the *Manage Locations* screen, click the **New Location** button.



A *New Location* screen will display. At a minimum, complete the required fields (required fields are denoted with an asterisk '*').


The screenshot shows a 'New Location' form with the following fields and callouts:

- 1**: Location Name* (text input)
- 1**: CRID* (text input)
- Country (dropdown menu, currently 'United States')
- State* (dropdown menu)
- Zip Code* (text input)
- Zip+4 (text input)
- 2**: ON OFF Active (toggle button, currently 'ON')
- 3**: (x) Provisioned (checkbox, currently checked)
- 4**: OFF Active (toggle button, currently 'OFF')
- User ID (text input)
- Password (text input)
- Confirm Password (text input)
- 5**: Auto Download Interval (hours) (text input, value '4')
- Done (button)


The top half of the screen **1** deals with the name, CRID, and address information of the selected location.


The newly added location automatically defaults to a status of 'Active' (i.e. ON) and should remain so if the MSP wishes to view submissions and statement information for the location. Click the ON (Active) / OFF (Deactive) toggle button **2** to change the location's status, if necessary.

Whether or not a location has been provisioned with Window Book's MailDrop Engine software is shown **3** (i.e. provisioned ; not provisioned). This field is not changeable; it is only a status indicator. When adding a new location, the status of this field will be 'not provisioned' until which time the user provisions the location in their MailDrop Engine software.


 **Location provisioning is required for retrieving PostalOne!-generated documents other than finalized postage statements, along with the ability to use PostalWeb's File Transfer service. Without provisioning, only finalized postage statements will be retrieved and only in four hour increments. Those finalized postage statements can only be emailed to specific users and not transferred to a computer or server automatically. Location provisioning allows for the almost immediately download of all PostalOne!-generated document information (not just finalized postage statements), which can be emailed to users and/or transferred to a computer or file on the MSP's network in both PDF and XML file formats.**

 **For instructions on how to provision a location in MailDrop Engine, refer to the "PostalWeb for Mail Service Providers - Setup Guide". The Guide is available on Window Book's web site at: <https://www.windowbook.com/Support/UserGuides>. Registration and/or login is required.**


 **For those MSP utilizing MailDrop Engine: Multiple Locations can be added to a mailer's PostalWeb site at any time; however, only one location may be provisioned in each instance of MailDrop Engine. This means that communication between PostalOne! and the MSP's PostalWeb site will only occur for that location, and data pertaining to that location only will be available on PostalWeb. Therefore, each location must be provisioned in its own unique installation of MailDrop Engine to have data pertaining to that location available on the mailer's PostalWeb site.**

The *PostalOne!* credentials' section of the screen  is used to enable and facilitate the Auto Statement Download feature of PostalWeb. This feature collects statements and other MSP-specific documents generated by *PostalOne!* pertaining to that specific location. This includes activity from the past 88 days; as well as, future statements/documents. This statement information is then posted on the MSP's PostalWeb site for users to view, and e-mails containing the attached documents are generated and sent to subscribed users.



Click the ON (Active) / OFF (Deactive) toggle button to activate or deactivate the feature. The default value of this feature when adding a new location is OFF (Deactive). When the feature is active, a set of valid *PostalOne!* credentials must be entered to allow the collection of statement information.

 **It is important that a set of *PostalOne!* (i.e. BCG) login credentials specific for use with Window Book software are entered. Using credentials that are also used interactively by a user can cause problems for lights out automation features, and may prevent interactive BCG login while that login is actively being used by any Window Book automation.**

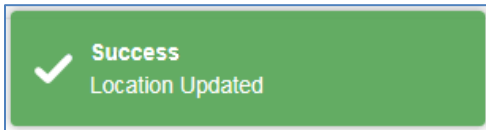
The 'Auto Download Interval (hours)' setting  controls the time interval between automatic downloads of the statement or document information from *PostalOne!*. The time interval can be set to a value between 4 and 24 hours.

 **The 'Auto Download Interval (hours)' setting may affect the amount of emails generated per interval, depending on the type(s) of Services subscribed to (refer to [SERVICES OPTION](#) for more information).**

When satisfied with the information displayed, click the **Done** button on the screen to save the information and create the location. The screen will update and display the *Manage Locations* screen with the newly added location listed.



 **Clicking the cancel icon  at any time will exit the New Location screen without saving any of the entered information, and the new location will not be created/added.**

In addition, a confirmation message will display.





Editing A Location

To edit the properties of an existing location, click anywhere on the location's colored tile.

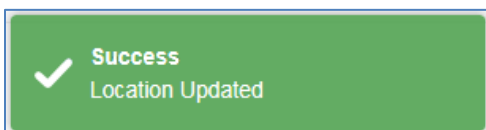
Name	CRID	Active	Provisioned	Location
Southern Division	12345678			FL 32113 -7491

The location's details screen will display, from which, the properties that make up or identify the location in PostalWeb can be edited. The required fields are denoted with an asterisk *.

Make any necessary updates/changes (refer to the [Adding a New Location](#) section for information about each field found in the details screen). When satisfied with the information displayed, click the **Done** button on the screen to save the updated location information.

 **Clicking the cancel icon  at any time will exit the editing screen without saving any changes that were made.**

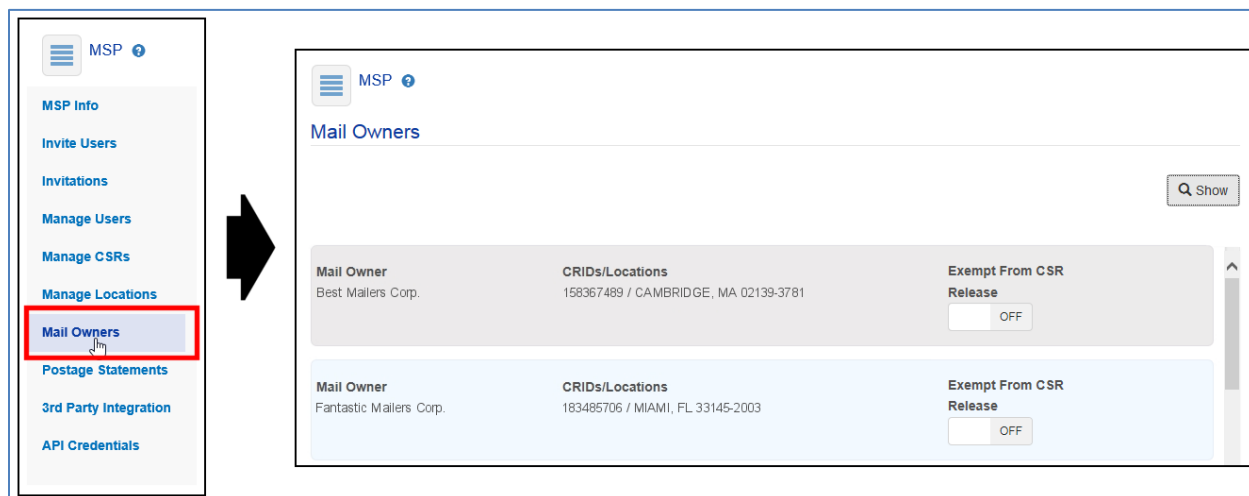
The screen will update and display the Manage Locations screen, and a confirmation dialog will display.



MAIL OWNERS OPTION

Role Access: Company Admin

The *Mail Owners* screen displays a list of the MSP's clients. It is displayed by selecting the 'Mail Owners' menu option from the MSP's side menu. This list of the MSP's clients (i.e. mail owners) auto-populates based on activity from *PostalOne!*.



The line item for each mail owner contains the following information:

Mail Owner	CRIDs/Locations	Exempt From CSR Release
Fantastic Mailers Corp.	183485706 / MIAMI, FL 33145-2003	<input type="checkbox"/> OFF

- **Mail Owner:** The name of the mail owner as it appears on postage statements; and
- **CRIDs/Locations:** The CRIDs and locations associated with the mail owner from past postage statements.

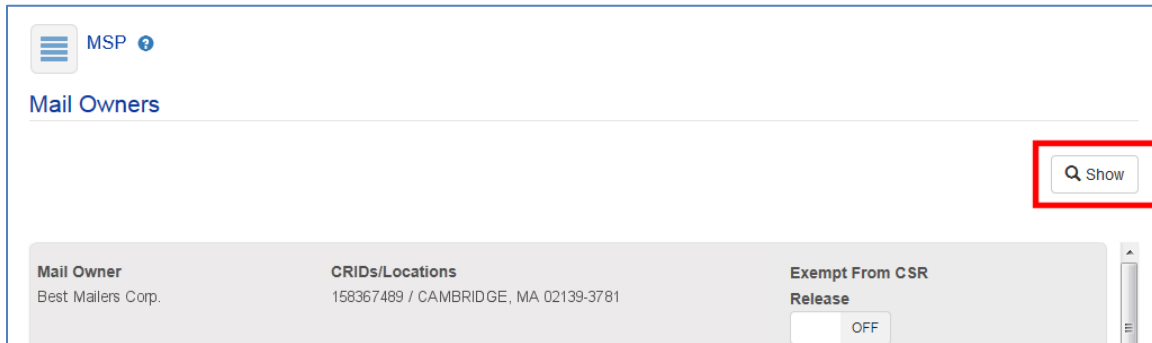
In addition, the line item for each mail owner contains an 'Exempt From CSR Release' function, controlled by an ON/OFF toggle button. The MSP can exempt a mail owner from the default CSR postage statement release process, so that the mail owner may receive postage statements directly from PostalWeb without the MSP's intervention.

If set to 'OFF', the mail owner is not exempt from the CSR process. In this case, the only method by which the mail owner is able to receive postage statements via PostalWeb is through the MSP's CSR release process. 'OFF' (i.e. not exempt) is the default setting.

If set to 'ON', the mail owner is exempt from the MSP's CSR release process. In this case the mail owner is able to receive postage statements via PostalWeb without any intervention by the MSP, bypassing the MSP's CSR release process.

A Company Admin can also perform a search for a specific mail owner by doing the following:

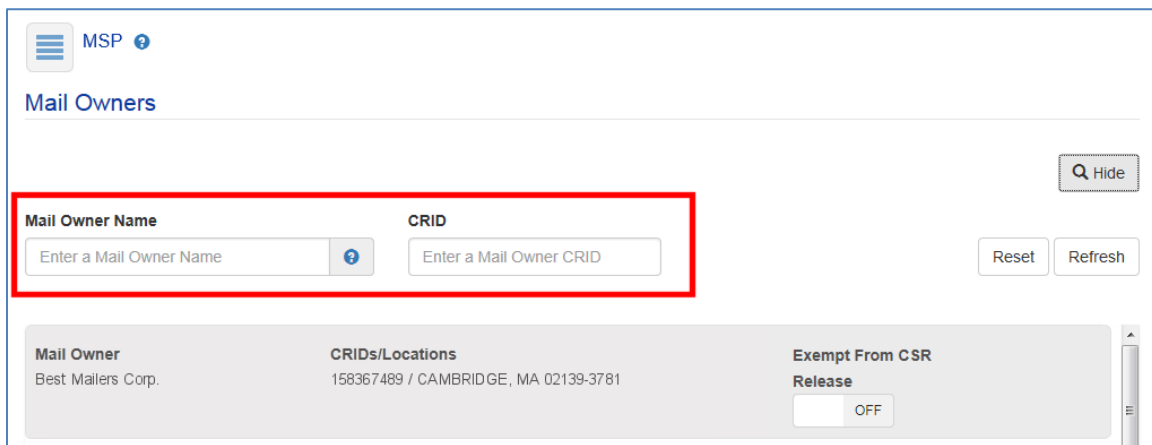
1. Click the **Show** button to display the search fields;



2. The screen will update to display two search fields:

- **Mail Owner Name:** The name of the mail owner. This entry does not have to be the complete name; only the first letter or letters need be entered;
- **CRID:** The CRID of the mail owner. This entry does not have to be the complete CRID number; only the first digits need be entered.

i *Only one field may be used at a time to search for a mail owner.*



3. After the search criteria is entered for either field, click the **Refresh** button. The matching mail owners, if any, are displayed as a result. If there are no matches, the screen will be blank (i.e. there will not be any line items displayed).

i *The REFRESH button will turn blue in color when the displayed data is stale and needs to be refreshed to show any updates.*

4. Click the **Reset** button to clear the search fields.

POSTAGE STATEMENTS OPTION

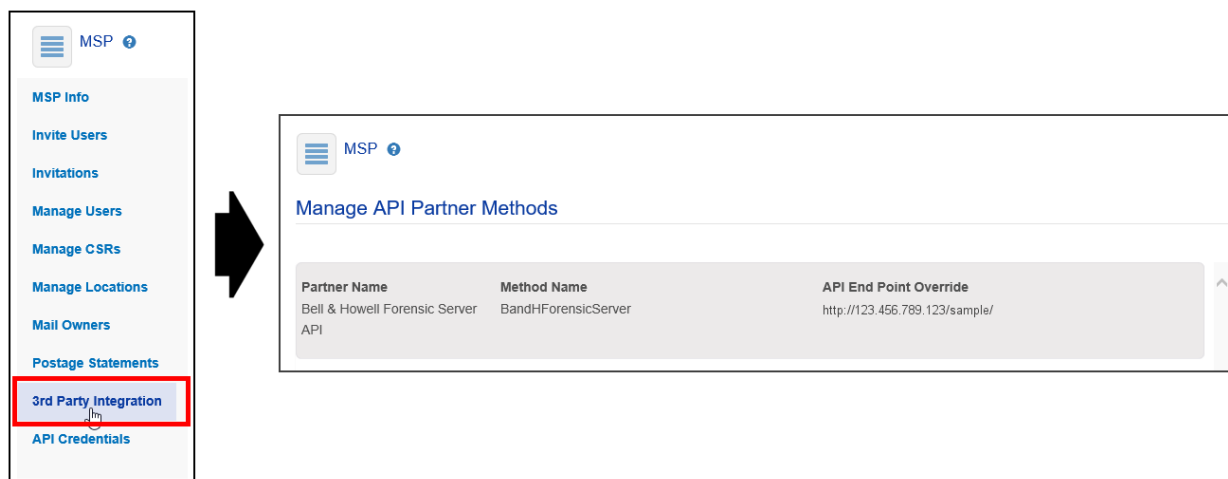
Role Access: Company Admin

The functionality that this Postage Statements option provides is also accessible from the [EDocs Menu](#); however, the Postage Statements option located from within the MSP side menu is only accessible to Company Admins. All roles have access to the Postage Statements option from the EDocs side menu as long as the ‘eDocs Application’ is enabled or turned ON in their user profile (refer to [MANAGE USERS OPTION](#) for more information).

A full explanation of the Postage Statements option is provided under [EDocs Menu](#); specifically, the [POSTAGE STATEMENTS OPTION](#) section.

3RD PARTY INTEGRATION OPTION

Role Access: Company Admin



Clicking the ‘3rd Party Integration’ option displays the *Manage API Partner Methods* screen. If a third party or partner application has been integrated with an MSP’s PostalWeb site, the Partner Name and Method Name will be displayed in its’ own line item on the screen. The details/settings for each partner application can be displayed by clicking its’ corresponding line item.

3rd Party Integrations must be activated and setup by a Window Book Professional Services representative. For information about the available 3rd Party Integration options refer to the [SERVICES OPTION](#) section in this Guide; specifically, the bullet item titled “3rd Party Category”.

Using PostalWeb

3RD PARTY STATS OPTION

Role Access: Company Admin

Clicking the '3rd Party Stats' option from the MSP side menu displays the 3rd party stats screen.

The screenshot shows the '3rd party stats' interface. On the left is the 'MSP' side menu with options like 'MSP Info', 'Invite Users', 'Invitations', 'Manage Users', 'Manage CSRs', 'Manage Locations', 'Mail Owners', 'Postage Statements', '3rd Party Integration', '3rd Party Stats' (highlighted), and 'API Credentials'. The main area is titled '3rd party stats' and contains search filters: 'Start Date' (04/10/2017), 'End Date' (04/17/2017), 'Job ID' (Job ID), and 'PS ID' (PS ID). Below these is a '3rd party service' dropdown menu currently showing 'Bell & Howell Fore...'. At the bottom right are 'Reset' and 'Run Report' buttons. A 'Hide' button is also present in the top right of the main area.

If a 3rd Party Service or Integration has been activated and set up for use in an MSP's PostalWeb site, the MSP can run a performance report for the service/integration by selecting it from the list provided (i.e. '3rd party service' field), entering further search criteria (if necessary), and clicking the **Run Report** button.

The default time parameter (i.e. Start Date and End Date) is the prior two weeks from the current date; however, this can be changed if preferred. In addition, a specific job ID and/or PS ID (postage statement ID) can also be entered to further narrow the report results.

All search criteria fields can be cleared or set back to their default values by clicking the **Reset** button.


Once the **Run Report** button is clicked, the results (if any), will display below the search criteria fields. The search criteria fields can be hidden (not displayed) by clicking the **Hide** button.

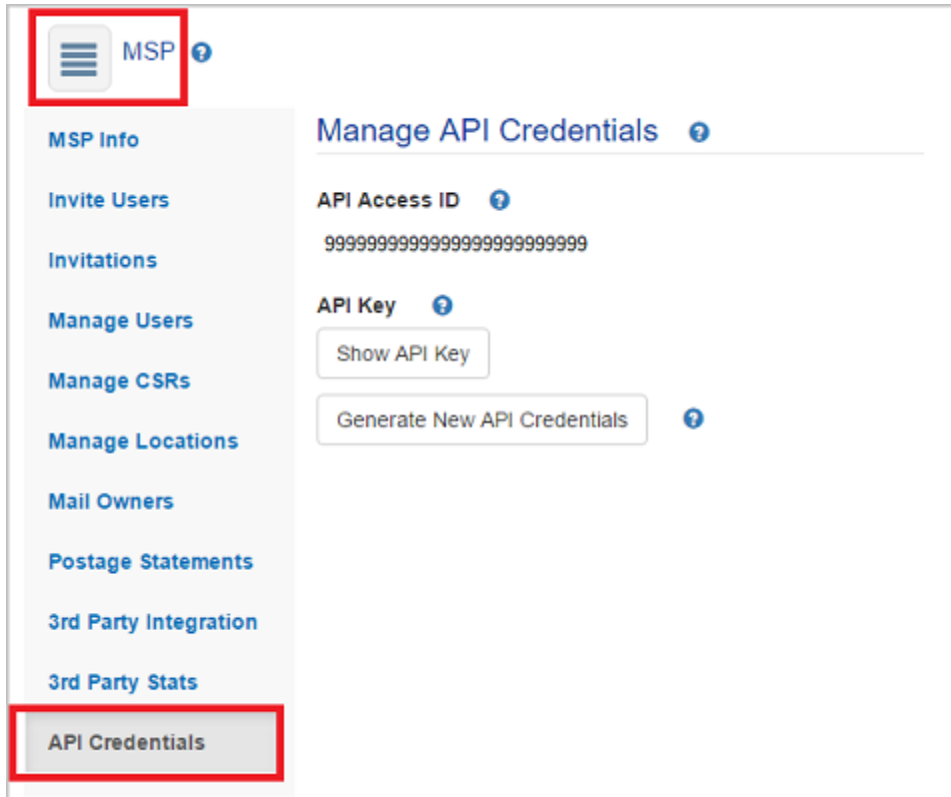
API CREDENTIALS OPTION

Role Access: Company Admin

Clicking the 'API Credentials' option from within the MSP side menu displays the *Manage API Credentials* screen (Company Admins only). The *Manage API Credentials* screen allows the user to view their assigned API Credentials. API credentials are used for provisioning an MSP's PostalWeb site with other Window Book applications, such as MailDrop™ Engine and By/For Validate™. Provisioning allows for

communication to occur between PostalWeb, the other Window Book software application(s), and *PostalOne!*.

 The 'API credentials' menu option is also available from within the [My Dashboard Menu > MY PROFILE / MEMBER PROFILE OPTION > API Credentials Option](#) for users assigned a role other than **Company Admin**



Display the API Key by clicking the **Show API Key** button.

 **PostalWeb's API credential information is highly sensitive. Care should be taken when copying and pasting the API credentials from PostalWeb to other Window Book software applications.**

 **Never click the GENERATE NEW API CREDENTIALS button unless requested to do so by Window Book's Professional Services!**

Reporting Menu

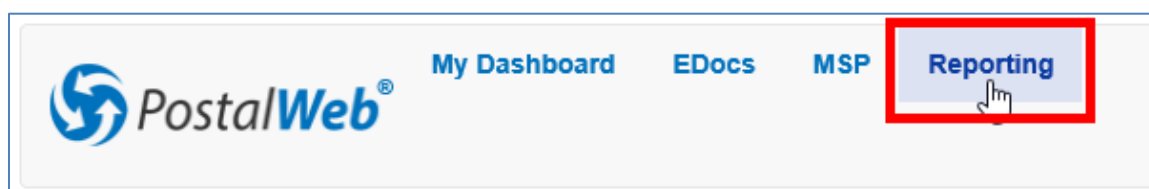
Role Access: All



The 'EDocs Reporting' feature must be turned ON in a user's profile in order for the 'Reporting' top menu to display. Turning this feature ON or OFF is controlled by a Company Admin (refer to [MSP Menu](#) > [MANAGE USERS OPTION](#) for more information).

The Reporting module in PostalWeb allows user-configurable reports to be easily generated and displayed, then saved in either PDF or Excel® formats if desired. Reports are based on the past 13 months of data (at a minimum) from the client's past postage statements retrieved from *PostalOne!*.

Click the Reporting menu item. The *Reporting / Management Reports* screen will display.



Click the Reporting side menu to expand it and view the available menu option (i.e. 'EDocs Reports').

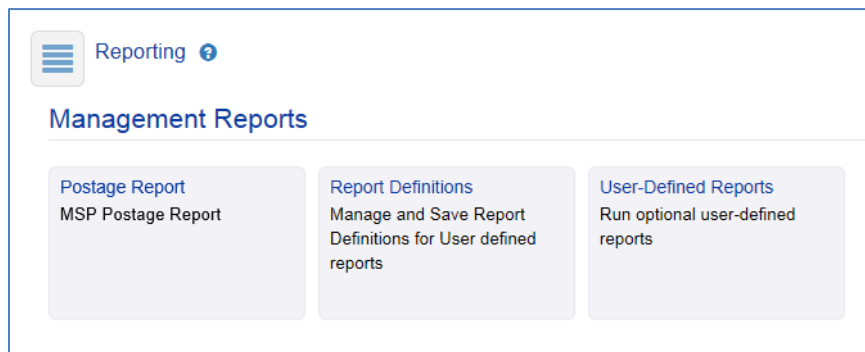


EDOCS REPORTS OPTION

Role Access: All

Selecting the 'EDocs Reports' option displays the corresponding *Management Reports* screen. This screen is also the default screen that displays when the 'Reporting' top menu is selected (clicked) (see above).

The following items are available for selection from within the EDocs Reports, *Management Reports* screen:



- **Postage Report:** A summary report of all mailings for a user-defined period that are itemized by class, mailing category (flats, letters, etc.) and rates. The resulting report may be exported into various file formats and/or printed. This report is predefined with a fixed layout;
- **Report Definitions** (requires 'EDocs Reporting' service be turned ON in user's profile): A utility for configuring a report definition or template to be used by the 'User-Defined Reports' report generator (see next bullet item below). Templates may be configured as either a summary or detailed listing using virtually any data field contained in a postage statement, in any order desired. Multiple templates may be configured and saved; and
- **User-Defined Reports** (requires 'EDocs Reporting' service be turned ON in user's profile): A report generator that uses the report definitions or templates previously defined in the 'Report Definitions' utility in combination with basic filtering. The user-defined report may be displayed and then saved as a PDF or Excel format file.



For more detailed information about the three EDocs Reports options, refer to [POSTALWEB REPORTING](#) in this Guide.

Location Menu

Role Access: Company Location Manager

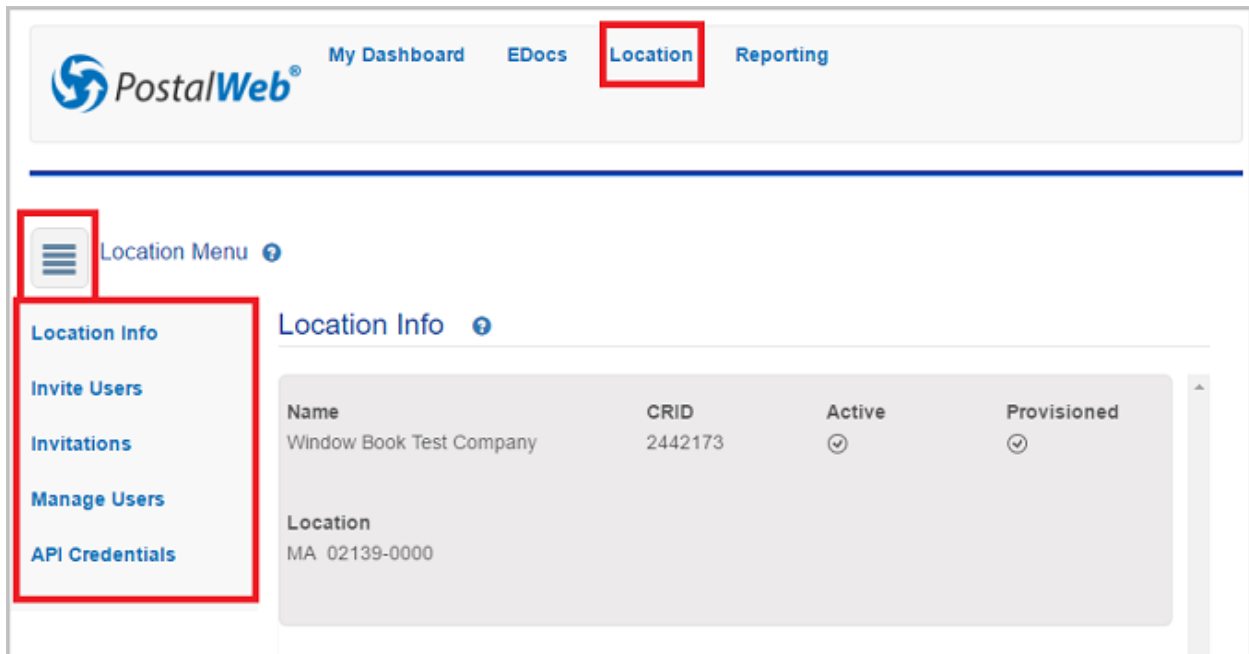


The 'Location' top menu item will only appear if the user has been assigned a role of Company Location Manager. For a Company Admin, the same functions provided in the Location menu and its' corresponding options are accessible from within the [MSP menu](#).

This category is intended for the maintenance and management of Locations assigned to a Company Location Manager; as well as, the management of users assigned the role of 'Company Location User'. A Company Location Manager only has access to the locations assigned by a Company Admin. And while a Company Location Manager can invite new users, a Company Location Manager can only assign the role of Company Location Manager or Company Location User to new users.

Using PostalWeb

Click the 'Location' top menu to display the *Location Menu / Location Info* screen. Click the 'Location' menu icon to expand the Location side menu.



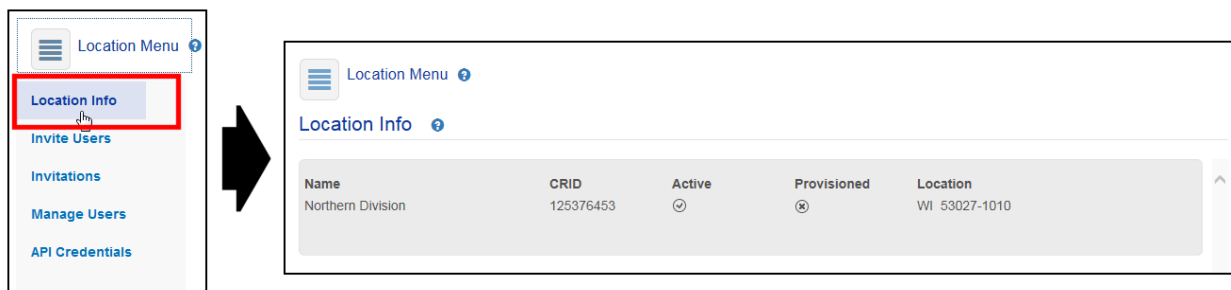
The 'Location' menu contains the following options:

- [Location Info](#);
- [Invite Users](#);
- [Invitations](#);
- [Manage Users](#); and
- [API Credentials](#).

LOCATION INFO OPTION

Role Access: Company Location Manager

Clicking on either the 'Location' top menu item or selecting the 'Location Info' side menu option will display the *Location Info* screen.



The *Location Info* screen displays the MSP's company location(s) in list format, along with the following information:

Name	CRID	Active	Provisioned	Location
Northern Division	125376453	☑	⊗	WI 53027-1010

Each line item shows:

- **Name:** The name of the location;
- **CRID:** The USPS-assigned Customer Registration Identification number for this location;
- **Active:** Whether this location is active (☑) or inactive (⊗);
- **Provisioned:** Whether this location has been provisioned (☑) or not provisioned (⊗) within Window Book's MailDrop Engine software; and
- **Location:** The state and ZIP Code of the location.



A Location Manager does not have permission to create or delete a location. Creating or deleting locations is available to the site's Company Admin(s) only.

Clicking anywhere on a location's colored tile to display the details of that location in an editable format.

Name	CRID	Active	Provisioned	Location
Northern Division	125376453	☑	⊗	WI 53027-1010

A location's details screen contains the following information:

☰ Location Menu ⓘ

Manage Location - Northern Division

✕

Location Name*	CRID*	Country
Northern Division ✕	125376453 _____	United States ▾
State*	Zip Code*	Zip+4
WI ▾	53027	1010

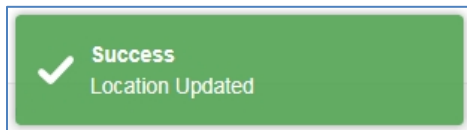
ON Active ⊗ Provisioned

Done

- **Location Name***: The name of the location (choose a name for a location that easily identifies it to all users). Length must be between 3-64 characters;
- **CRID***: The USPS-assigned Customer Registration Identification number for this location;
- **Country**: Specifies the country where the location exists (i.e. 'United States' or 'Canada'):
 - **United States***: Required fields will include:
 - **State***: Select the appropriate state from the pull-down menu; and
 - **Zip Code***: Enter the 5-digit ZIP Code assigned to the MSP's location.
 - **Canada***: Required fields will include:
 - **Province***: Select the Canadian province the MSP is located in from the pull-down menu; and
 - **Postal Code***: Enter the Canadian postal code assigned to the MSP's location.
- **Active**: This can be set to be either active ('ON') or inactive ('OFF') by clicking the button; and
- **Provisioned**: This is not changeable; it is only a status indication of whether this location has been provisioned (☑) or not provisioned (☒) within Window Book's MailDrop Engine software.

When satisfied with the information displayed, click the **Done** button to save the location information.

The user will be returned to the *Location Info* screen and a confirmation message will display.



Clicking the cancel icon (☒) at any time will exit the editing screen and display the *Location Info* screen and any changes made to the existing settings will be lost.

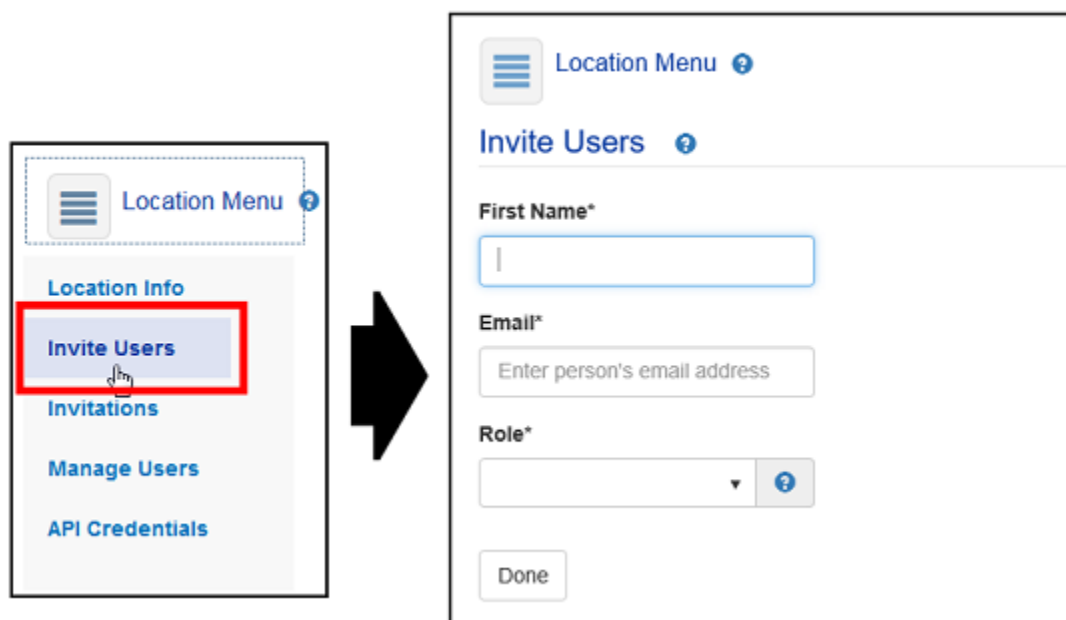
INVITE USERS OPTION

Role Access: Company Location Manager

i This 'Invite Users' option is only accessible to users assigned a role of Company Location Manager. The same functionality is also available to the site's Company Admin(s); however, from within the [MSP menu](#).

Inviting users is the first step in bringing new users on-board to use PostalWeb. The invitation is sent from PostalWeb via e-mail to the invitee. The email contains a link which the invited individual must click on. Doing so will open a new web page that includes an application the invitee must complete before being allowed to log into the MSP's PostalWeb site. At the same time a second email will be sent to the person sending the invitation to advise him or her that the invitation has been accepted by the invitee.

To display the *Invite Users* screen select the 'Invite Users' option in the Location side menu.



To invite a new user, enter the following:

- **First Name***: The first name of the individual being invited;
- **Email***: The email address of the user being invited. This is where the invitation will be sent; and
- **Role***: Combination of function and permissions level. Select the desired role from the pull down list. The only roles available for selection are 'Location Manager' and 'Location User' (refer to the [ROLES](#) section in this Guide for a description of each).

Using PostalWeb

After the role is selected, the location(s) the Company Location Manager has access to will display. The Company Location Manager can assign only those same locations to the invitee.

Activate (i.e. turn ON) the location(s) the invitee is to have access to. In the example being used here, the Company Location Manager who is creating/sending the invitation has access to only one location (see image below).

When the invitation is complete, click the **Done** button.

Location Menu ?

Invite Users ?

First Name*
Jane

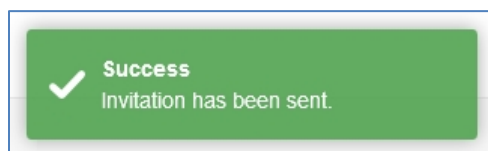
Email*
janedoe@pwexample.com

Role*
Location User ?

Authorize for the following active location(s)
Northern Division

Done

A confirmation message will display.



The invitation will be displayed on the invitation list located in the 'Invitations' sub-category.

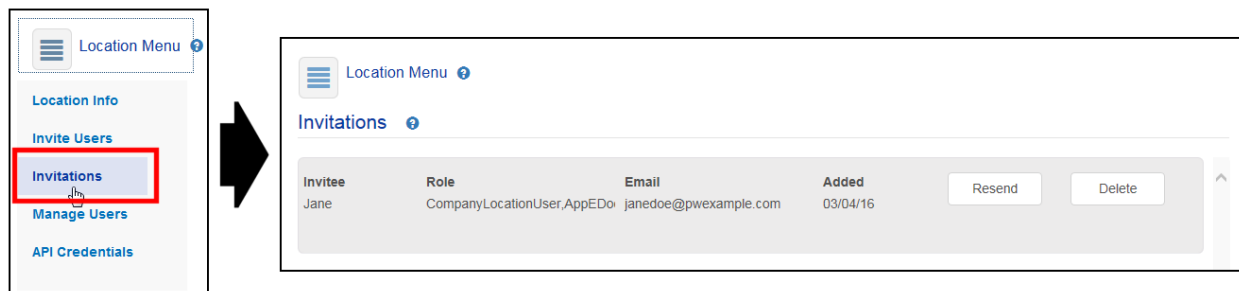
! *Navigating away from the 'Invite Users' screen before clicking the DONE' button will result in the invitation not being created and/or sent.*

INVITATIONS OPTION

Role Access: Company Location Manager

i This 'Invitations' option is only accessible to users assigned a role of Company Location Manager. The same functionality is also available to the site's Company Admin(s); however, from within the [MSP menu](#).

An invitation initiated by a Company Location Manager generates an email to the invited individual. When the email invitation is sent, the invitation is also added to the list of invitations in PostalWeb that are waiting to be replied to. To see the list of pending invitations (i.e. invitations that have not been replied to), select the 'Invitations' menu option from the Location side menu.



i The Location Menu > Invitations Option functions the same as the MSP Menu > Invitations Option. For a full description of how it works, refer to [INVITATIONS OPTION](#) documented in the [MSP Menu](#) section of this Guide.

MANAGE USERS OPTION

Role Access: Company Location Manager

i This 'Manage Users' option is only accessible to users assigned a role of Company Location Manager. The menu option is also available to the site's Company Admin(s); however, from within the [MSP menu](#).

The *Manage Users* screen for Company Locations Managers allows the assignment or re-assignment of roles and locations for all users other than a Company Admin, but their control is limited. To see a list of the available Users select the 'Manage Users' option from the Location side menu.

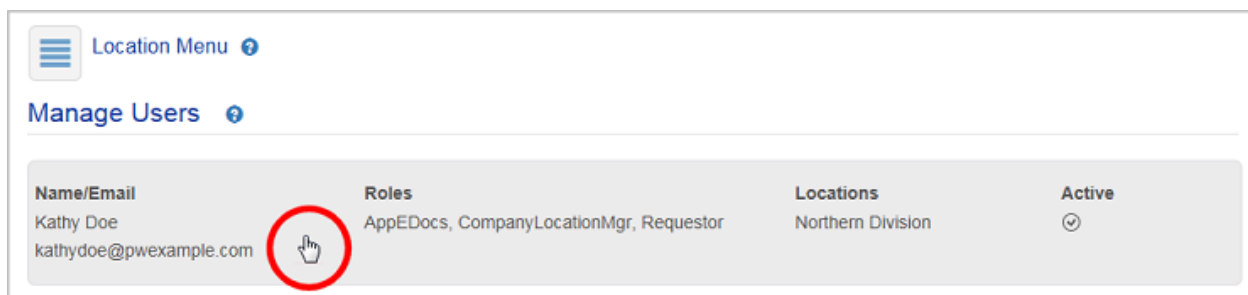


i **All users other than those assigned a role of Company Admin will be displayed in the Location Menu > Manage Users screen.**

The line item for each user contains the following information (see image below):

- **Name/Email:** The name and email address as listed in the user's 'Member Profile';
- **Roles:** The current role(s) assigned;
- **Locations:** The current, active location(s) assigned;
- **Active:** Whether the user is currently active (☑) or inactive (☒).

To view a user's details, single-click anywhere on the colored tile of that user's line item.



Name/Email	Roles	Locations	Active
Kathy Doe kathydoe@pwexample.com	AppEDocs, CompanyLocationMgr, Requestor	Northern Division	☑

The Manage User details screen will display. Whether or not the PostalWeb user is active or inactive can be controlled by the Company Location Manager in this screen. In addition, both Roles and Locations can also be assigned or made inactive, but this control is limited.

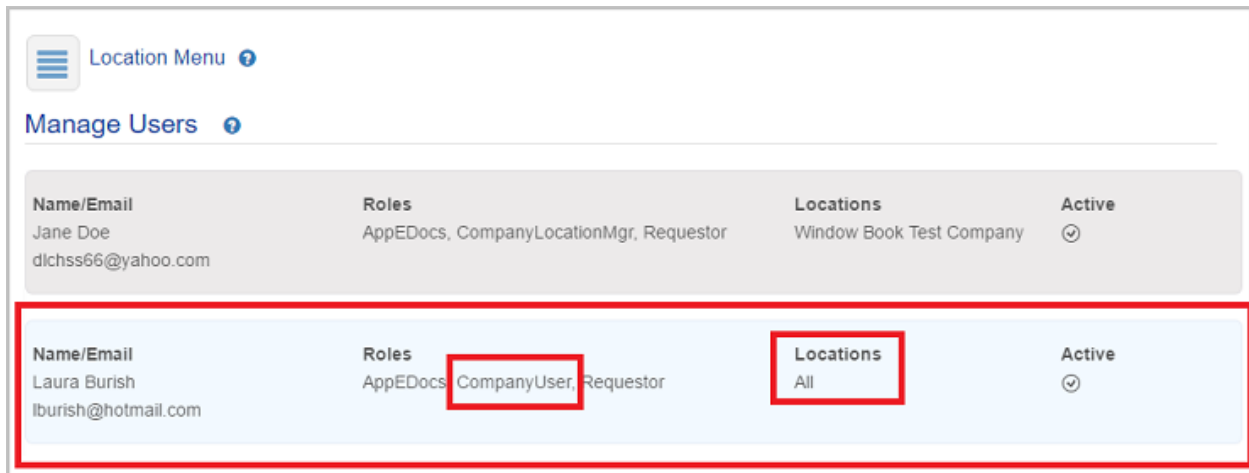
The Company Location Manager only has rights to turn ON or OFF the role of Company Location Manager and Company Location User, so those are the only two roles that will display on the screen.

In addition, the Company Location Manager can only turn ON or OFF the locations for that user that he or she has access to; therefore, only those locations will display on the screen.

In other words, depending on the role the user is assigned, what displays in the *Manage User* list screen for that user can differ from what is displayed in their details screen.

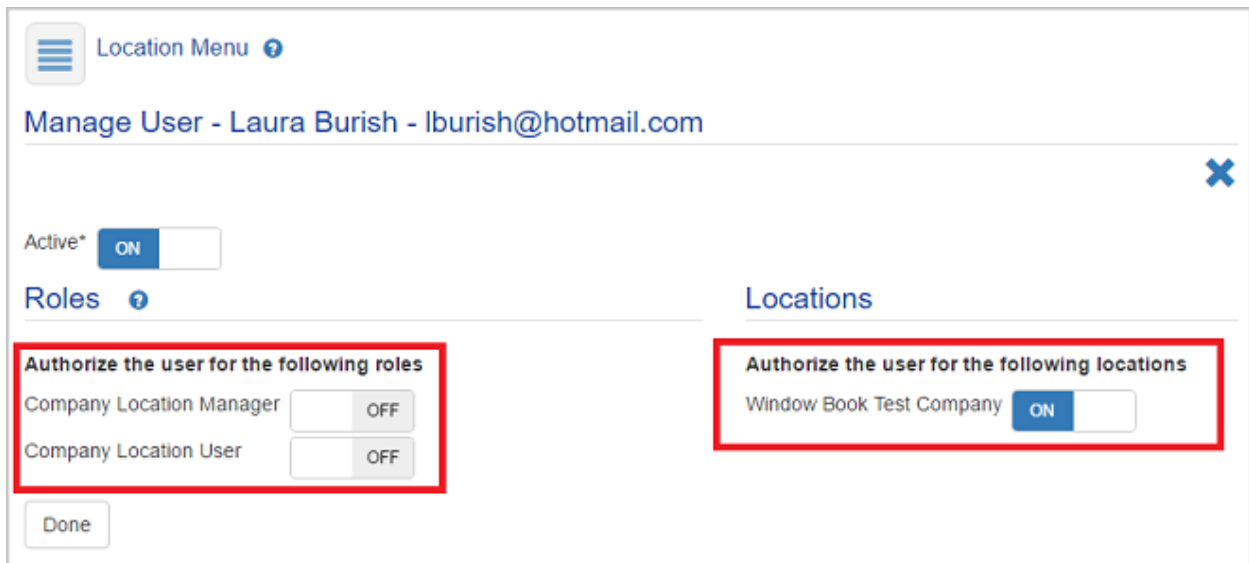
Example:

Manage Users Screen: Roles = 'Company User'; Locations = 'All' (there are 2 active locations present for this PostalWeb site).



Name/Email	Roles	Locations	Active
Jane Doe dlchss66@yahoo.com	AppEDocs, CompanyLocationMgr, Requestor	Window Book Test Company	<input checked="" type="checkbox"/>
Laura Burish lburish@hotmail.com	AppEDocs, CompanyUser , Requestor	All	<input checked="" type="checkbox"/>

Here is the same user's details screen as accessed by a Company Location Manager. The user's assigned role of Company User is not displayed, as the Company Location Manager only has rights to assign Company Location Manager and Company Location User roles (note in the image below, both of these roles are turned OFF). In addition, according to the *Manage Users* screen, this user has access to all of the active locations (i.e. Locations = "All"); however, because the Company Location Manager that accessed this user's details screen only has access to one of the active locations, only that particular location is displayed and can be turned ON or OFF.



Location Menu ?

Manage User - Laura Burish - lburish@hotmail.com

Active*

Roles ?

Authorize the user for the following roles

Company Location Manager OFF

Company Location User OFF

Locations

Authorize the user for the following locations

Window Book Test Company

Done


Below is a description of what is contained in a user's details screen:

The screenshot shows the 'Manage User' interface for a user named Kathy Doe. At the top left is a 'Location Menu' icon. The title bar reads 'Manage User - Kathy Doe - kathydoe@pwexample.com' with a close button (X) on the right. Below the title bar, there is an 'Active*' toggle set to 'ON'. The 'Roles' section lists 'Company Location Manager' (ON) and 'Company Location User' (OFF). The 'Locations' section lists 'Northern Division' (ON). A 'Done' button is located at the bottom left.

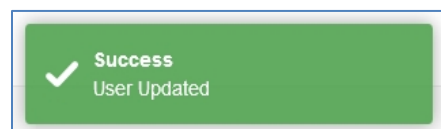
- **Active*:** This can be set to be either ON (active) or OFF (inactive) by clicking the toggle button. If a user's profile is set to OFF, the user will not be able to log in to the PostalWeb site;
- **Roles:** The roles available to Company Location Managers are listed in this section (i.e. Company Location Manager and Company Location User). Company Location Managers can activate or deactivate all users (other than Company Admins). They can also turn locations ON and OFF for all users (other than Company Admins). Only the roles of Company Location Manager and Company Location User will be displayed. Turning a role OFF will still allow the user to log in to the PostalWeb site, but their accessibility will be limited; and
- **Locations:** The locations displayed are those pre-defined locations that were set up in the [MSP Menu > MANAGE LOCATIONS OPTION](#) by a Company Admin. Locations must be active to display in this screen. In addition, only the location(s) that the Company Location Manager who is currently logged into the PostalWeb site and the user has in common will display. Multiple locations can be displayed and selected.

 **A user must have at least one location set to ON.**

If updates are made to a user's details, it is important to click the **Done** button in the bottom left corner of the screen.

 **Navigating away from the Manage Users details screen or clicking the cancel icon  at any time will exit the editing screen and any changes made to the existing settings will be lost.**

A confirmation message will display.

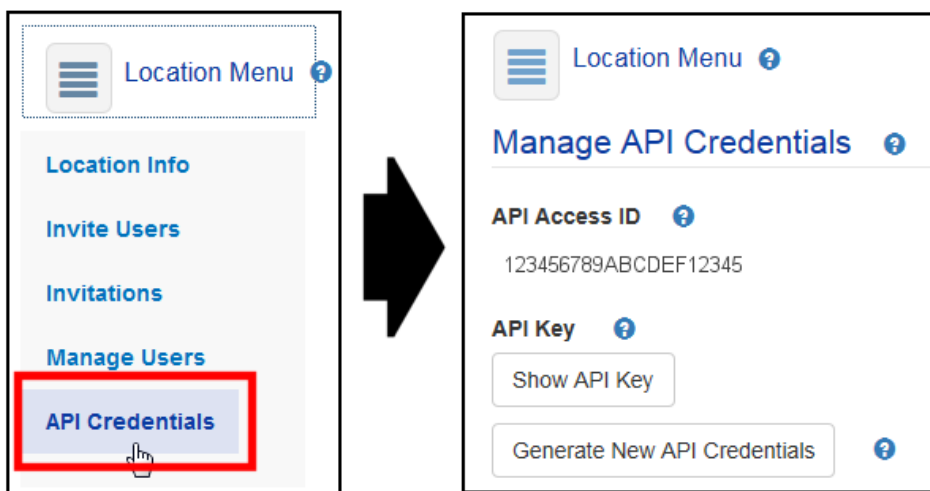


API Credentials

Role Access: Company Location Manager

Clicking the 'API Credentials' option from within the Location side menu displays the *Manage API Credentials* screen (Company Location Managers only). The *Manage API Credentials* screen allows the user to view their assigned API Credentials. API credentials are used for provisioning an MSP's PostalWeb site location with other Window Book applications, such as MailDrop™ Engine and By/For Validate™. Provisioning allows for communication to occur between PostalWeb, the other Window Book software application(s), and *PostalOne!*.

i The 'API credentials' menu option is also available from within the [My Dashboard Menu > MY PROFILE / MEMBER PROFILE OPTION > API Credentials Option](#) for users assigned a role other than *Company Location Manager* or *Company Admin* (*Company Admins* can access this same information from the [MSP Menu > API CREDENTIALS OPTION](#)).



Display the API Key by clicking the **Show API Key** button.

- !** *PostalWeb's API credential information is highly sensitive. Care should be taken when copying and pasting the API credentials from PostalWeb to other Window Book software applications.*
- !** *Never click the GENERATE NEW API CREDENTIALS button unless requested to do so by Window Book's Professional Services!*

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POSTALWEB REPORTING

Role Access: All

The Reporting module in PostalWeb allows user-configurable reports to be easily generated and displayed, then saved in either PDF or Excel formats if desired. Reports are based on the past 13 months of data (at a minimum) from the client's past postage statements retrieved from *PostalOne!*.

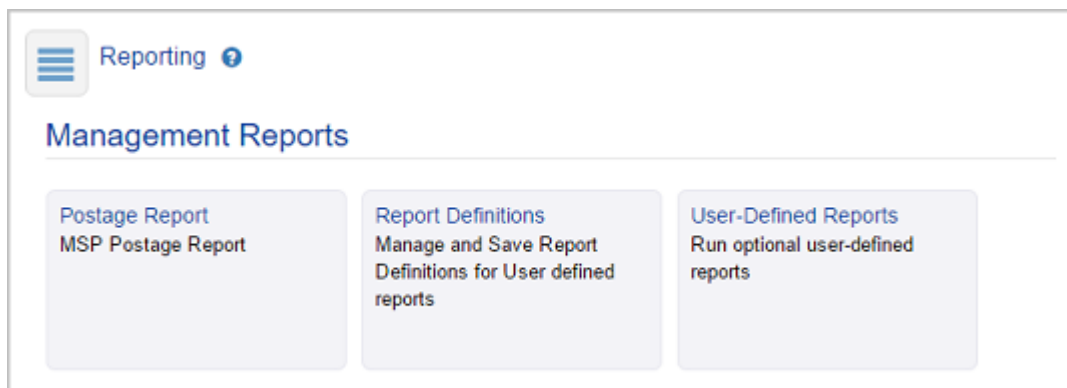
With the exception of those users assigned a role of 'Company User', the 'Reporting' top menu always displays when a user logs in to their PostalWeb site whether or not the 'EDOCS Reporting' service was enabled for them by their site's Company Admin (refer to [Manage Users Option](#) under [MSP Menu](#) in this Guide for more information).

When the 'EDOCS Reporting' service is NOT enabled, all roles (other than the Company User) will have access to the 'Postage Report' option.

When the 'EDOCS Reporting' service IS enabled, all roles (including the Company User) will have access to all three of the available options in PostalWeb's Reporting function.

An introduction to PostalWeb's Reporting menu is documented under [Reporting Menu](#) in this Guide.

This section of the Guide is intended to provide full user instructions for PostalWeb's Reporting service; specifically, the three options that exist from within the Reporting menu for MSPs: [Postage Report](#); [Report Definitions](#); and [User-Defined Reports Option](#).



POSTAGE REPORT

Role Access: All

The Postage Report is a summary report of all mailings that PostalWeb has collected for a user-defined period that are itemized by class, mailing category (flats, letters, etc.) and rates. The resulting report may be exported in Excel or PDF file formats.



The *MSP Postage Report* screen will display. Filters used for streamlining the report results are shown.

 A screenshot of the 'MSP Postage Report' filter screen. At the top right is a 'Hide' button. Below it are six filter fields arranged in two rows: 'Start Date' (10/01/2016), 'End Date' (10/31/2016), 'Job ID' (Job ID), 'Job Number' (Job Number), 'Permit Number' (Permit Number), and 'Mail Owner' (empty). Each field has a calendar icon and a help icon. At the bottom right are 'Reset' and 'Run Report' buttons.

The 'Start Date' value defaults to a date approximately 30 days earlier than the current date, while the 'End Date' value defaults to the current date. If desired, the date values may be changed to new values.

The 'Job ID', 'Job Number', 'Permit Number' and 'Mail Owner' filters are mutually exclusive, i.e. only a single filter may be used at one time.

The **Reset** button can be used to clear any previously set filters.

After the desired filters are set, click the **Run Report** button. The resulting report will display on the screen below the report filters (i.e. "MSP Postage Report Result").



Once the "MSP Postage Report Result" displays, the HIDE button can be used to hide the filter fields so that they no longer display on the screen (see image above for the HIDE button).

The 'MSP Postage Report Result' table is comprised of the following data elements:

Form/Mail Class	Category	Rate Description	Entry	Pieces	Postage
First Class					
	Letters (may inclu			452	576.49
	Letters (may inclu	3-Digit		65,246	18,170.99
	Letters (may inclu	5-Digit		114,473	28,618.25
	Letters (may inclu	AADC		13,850	4,211.03
	Letters (may inclu	Mixed AADC		13,528	4,167.22
	Letters (may inclu	Nonpresorted/Single-		1,247	660.92
				340,348	85,774.37

Largest Job	Smallest Job	Total Jobs	Average Job
333,288	234	22	31,170

- **Form/Mail Class:** The class or form of mail;
- **Category:** The type of mail (letters, flats, etc.);
- **Rate Description:** The rate level or type applied to the mail class and category;
- **Entry:** The entry point at which the mail entered the USPS delivery system, if available;
- **Pieces:** The total number of pieces for the combination of Form/Mail Class, Category and Rate Level; and
- **Postage:** The total postage cost for the number of pieces mailed, using the combination of Form/Mail Class, Category and Rate Level.

Below the 'MSP Postage Report Result' table, a basic statistics chart is displayed that provides a summary of the job data the report was derived from.

Largest Job	Smallest Job	Total Jobs	Average Job
880	586	5	676

To export the report results to an Excel or PDF file, click the corresponding button located above the report.



The EXPORT TO EXCEL and EXPORT TO PDF buttons only display if a report containing data is returned after the RUN REPORT button is clicked.

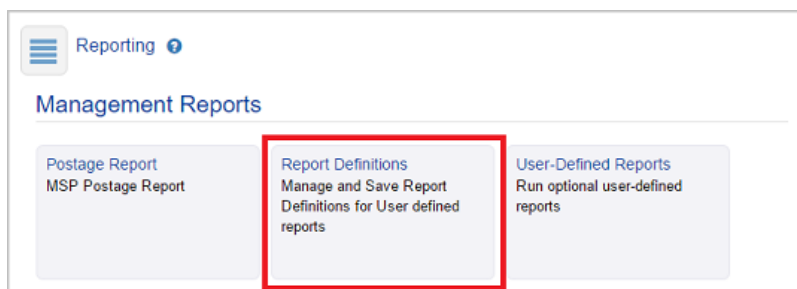
REPORT DEFINITIONS

The 'Report Definitions' utility allows for the configuration of user-defined report definitions or templates. These templates can then be used to generate a report in the [User-Defined Reports](#) generator.

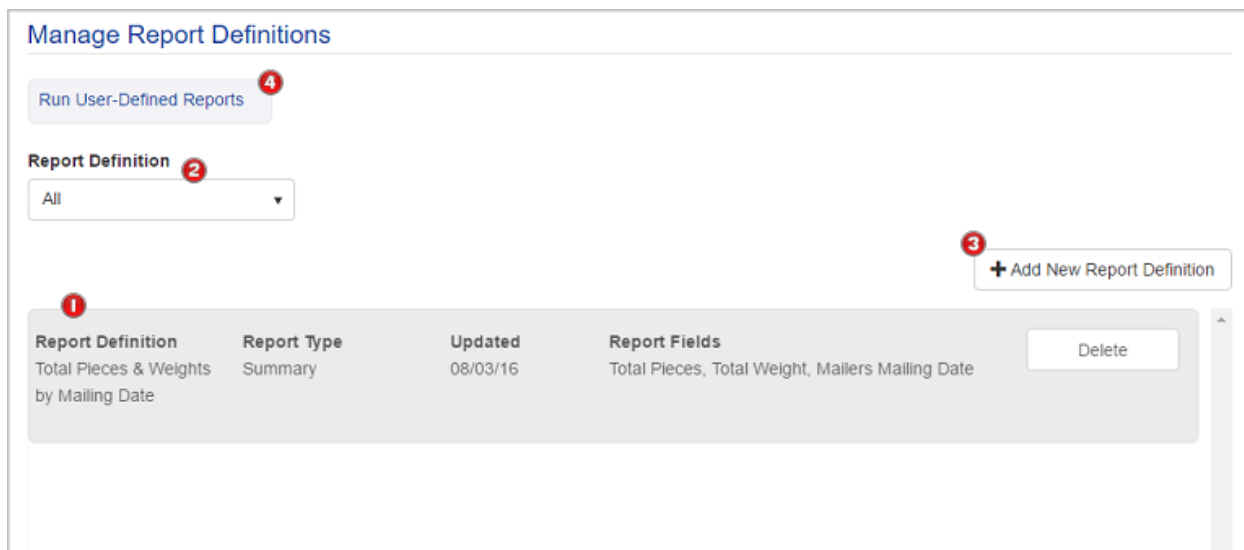
Report definition templates may be configured to generate several types of reports using virtually any data field contained in a Mail.dat file (or postage statement), and be displayed in any order desired. Multiple report definitions may be configured and saved.

i A 'report definition' must be created before a 'user-defined report' can be generated.

To view, create or modify report definition templates, click the 'Report Definitions' tile on the *Management Reports* screen.



The *Manage Report Definitions* screen will display.



If any report definitions or templates already exist, they will be listed on the screen **i**. The following information is provided in each definition's line item:

- **Report Definition:** The name of the report definition or template. The name is provided by the user when the definition or template is created;

- **Report Type:** The report definition or template type (i.e. 'Summary', 'Detail', or 'Detail Postage' – refer to [Report Definition Types](#) for more information);
- **Updated:** The date the report definition or template was updated/modified; and
- **Report Fields:** The fields used (i.e. turned 'ON') in the report definition or template.

In addition, individual report definitions can be deleted entirely by clicking the definition's corresponding **Delete** button.

Existing report definitions can also be edited or modified. Refer to [Editing A Report Definition](#) for instructions.

Report Definition	Report Type	Updated	Report Fields	Delete
Total Pieces & Weights by Mailing Date	Summary	08/03/16	Total Pieces, Total Weight, Mailers Mailing Date	Delete

If report definitions or templates already exist, the definitions that display on the screen can be controlled or limited by selecting a filter from the 'Report Definition drop down list provided (2). The available filter are:

- **All (default):** Displays any/all existing report definitions;
- **My Reports:** Displays only those reports created by the user currently logged in to the PostalWeb site;
- **Available Shared Reports:** Displays only those definitions that have been 'shared' among users (refer to [Create A Report Definition](#) for more information); and
- **Available System Reports:** Displays only those report definitions that were created for the Client by Window Book.

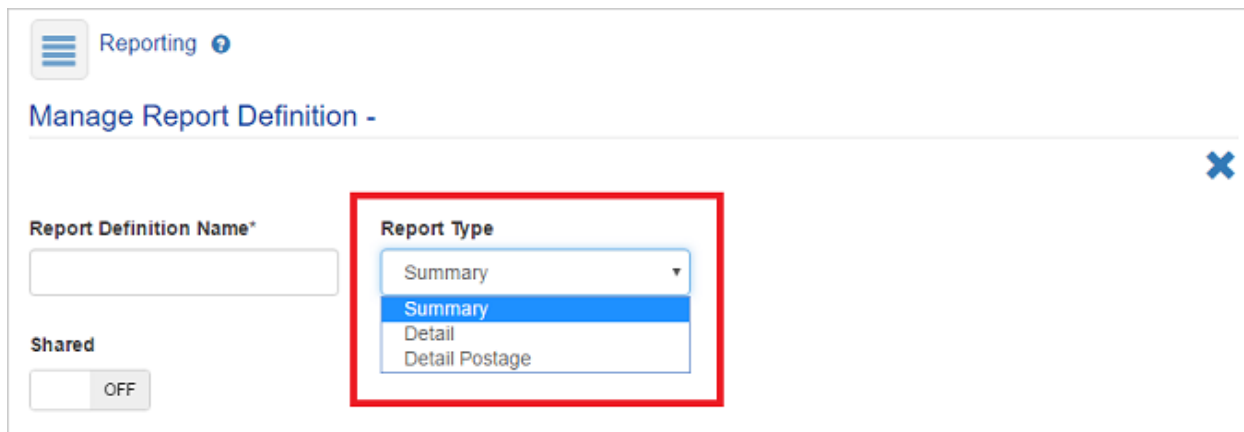
The process of creating a new report definition is begun by clicking the **+Add New Report Definition** button (3) (refer to [Create A Report Definition](#) for instructions).

To create and run a user-defined report requires the use of an existing report definition. Users can easily navigate to the [User-Defined Reports](#) generator by clicking the **Run User-Defined Reports** button (4). Once in the User-Defined Report generator, users can easily navigate back to the *Manage Reports*

Definition screen by clicking the corresponding **Manage Report Definitions** button (refer to [User-Defined Reports](#) for more information).

Report Definition Types

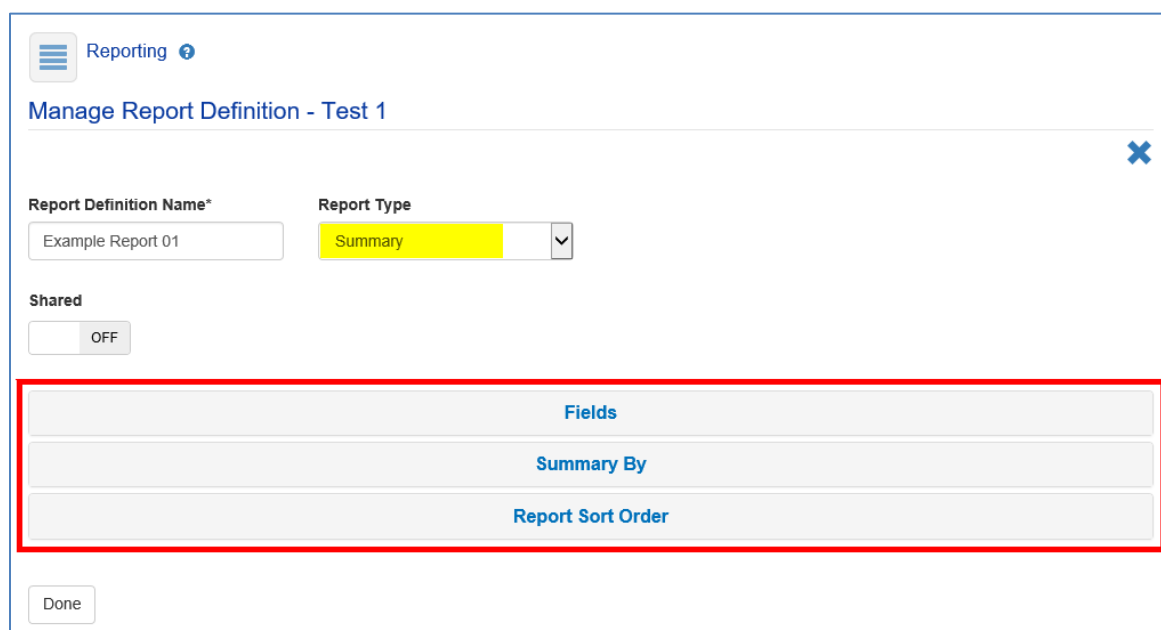
There are three different types of report definitions that can be created: [Summary](#) (default); [Detail](#); and [Detail Postage](#).



SUMMARY REPORT DEFINITION TYPE

A Summary report definition type (default) will aggregate statements that share a common identifier specified by the user and show subtotals.

When 'Summary' is selected as the report type, the displayed screen will consist of the following sections: Fields; Summary By; and Report Sort Order. Clicking on a section's title bar will expand it and display its' corresponding fields.



- **Fields:**

Fields				
Job Mailing Attributes Postage Pieces USPS Transaction Preparer MailOwner Permit Holders Publications PW Internal	Job Number	<input type="checkbox"/> OFF	Job ID	<input type="checkbox"/> OFF
	Job Description	<input type="checkbox"/> OFF	Mail.Dat File Name	<input type="checkbox"/> OFF
	Customer Ref ID	<input type="checkbox"/> OFF		
	Summary By			
	Report Sort Order			

The 'Fields' section contains virtually all fields that exist in a Mail.dat file, organized into various categories, which are listed in a vertical menu on the left side of the screen. Clicking on any of these categories will display the fields contained within that category.

Any field may be selected to be displayed in the report (as a column). To select a field, click on the field name or its associated toggle button. When a field is selected to appear on the report, its toggle button will display a value of ON.

i For a complete list of the available fields, refer to [APPENDIX 4](#) in this Guide.

i If fields in the 'Summary By' section have already been selected, some fields in the 'Fields' section may be disabled (ghosted).

- **Summary By:**

When grouping is used, only numeric fields that can be totaled will be available for selection

Fields				
Job Mailing Attributes Postage Pieces USPS Transaction Preparer MailOwner Permit Holders Publications PW Internal	Job Number	<input type="checkbox"/> OFF	Job ID	<input type="checkbox"/> OFF
	Job Description	<input type="checkbox"/> OFF	Mail.Dat File Name	<input type="checkbox"/> OFF
	Customer Ref ID	<input type="checkbox"/> OFF		
	Report Sort Order			

The 'Summary By' section contains fields for which the returned data will be summarized or grouped by on a report. The available fields are grouped into categories that are listed in a vertical menu on the left side of the screen. When a category is selected (clicked), its corresponding fields will display.

Click the corresponding toggle button to select or deselect a field. When a field is selected, its toggle button will display a value of ON.



Selecting a field in the 'Summary By' section may disable selections previously made in the 'Fields' section.

- **Report Sort Order:**

The 'Report Sort Order' section is used to define the display order of the selected fields within the report.

As fields are selected in the 'Fields' and 'Summary By' sections, they are automatically added to the 'Available fields' stack located in the Report Sort Order section. Users can then move any or all of the available fields to the 'Order by fields' stack as desired.

The field tiles that appear in both the 'Order by fields' *and* the 'Available fields' will be included in the report. The fields shown in the 'Order by fields' stack will appear first in the report, in the order they appear in the stack.

Any fields listed in the 'Available fields' stack will also appear in the report in a pre-determined order, but they will appear in the report *after* the fields listed in the 'Order by fields' stack. For this reason, it is recommended to move all the fields listed in the 'Available fields' stack to the 'Order by fields' stack to ensure the correct order of appearance in the report.

For additional information on using the 'Report Sort Order' section, please refer to [Using the 'Report Sort Order' Section](#).

DETAIL REPORT DEFINITION TYPE

A Detail report definition type will return each postage statement that meets the user's filter criteria.

When 'Detail' is selected as the report type, the displayed screen will consist of the following sections: Fields; and Report Sort Order. Clicking on a section's title bar will expand it and display its' corresponding fields.

Reporting

Manage Report Definition - Test 1

Report Definition Name* Example Report 01

Report Type Detail

Shared OFF

Fields

Report Sort Order

Done

- **Fields:**

Fields

Job

Mailing Attributes

Postage Pieces

USPS Transaction

Preparer

MailOwner

Permit Holders

Publications

PW Internal

Job Number OFF

Job ID OFF

Job Description OFF

Mail.Dat File Name OFF

Customer Ref ID OFF

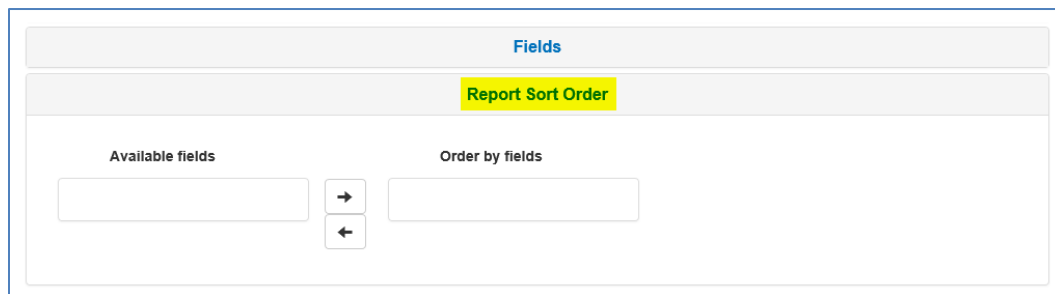
Report Sort Order

The 'Fields' section contains all available fields for use, organized into various categories, that are listed in a vertical menu on the left side of the screen. Clicking on any of these categories will display the fields contained within that category.

Any field may be selected to be displayed in the report (as a column). To select a field, click on the field name or its associated toggle button. When a field is selected to appear on the report, its toggle button will display a value of ON.

 For a complete list of the available fields, refer to [APPENDIX 4](#) in this Guide.

- **Report Sort Order:**



The screenshot shows a web interface for configuring report sort order. At the top, there is a 'Fields' header. Below it is a 'Report Sort Order' section, which is highlighted in yellow. This section contains two main areas: 'Available fields' on the left and 'Order by fields' on the right. Each area has a text input field. Between these two input fields are two small buttons: one with a right-pointing arrow (→) and one with a left-pointing arrow (←), used for moving fields between the two stacks.

The 'Report Sort Order' section is used to define the display order of the selected fields within the report.

As fields are selected in the 'Fields' section, they are automatically added to the 'Available fields' stack located in the Report Sort Order section. Users can then move any or all of the available fields to the 'Order by fields' stack as desired.

The field tiles that appear in both the 'Order by fields' *and* the 'Available fields' will be included in the report. The fields shown in the 'Order by fields' stack will appear first in the report, in the order they appear in the stack.

Any fields listed in the 'Available fields' stack will also appear in the report in a pre-determined order, but they will appear in the report *after* the fields listed in the 'Order by fields' stack. For this reason, it is recommended to move all the fields listed in the 'Available fields' stack to the 'Order by fields' stack to ensure the correct order of appearance in the report.

For additional information on using the 'Report Sort Order' section, please refer to [Using the 'Report Sort Order' Section](#).

DETAIL POSTAGE REPORT DEFINITION TYPE

A Detail Postage report definition type is similar to the Detail Report, except that it contains additional detail fields that can be used.

When 'Detail Postage' is selected as the report type, the displayed screen will consist of the following sections: Fields; Summary By; Detail Fields; and Report Sort Order. Clicking on a section's title bar will expand it and display its' corresponding fields.

Reporting ⓘ

Manage Report Definition - Test 1

Report Definition Name* Report Type Detail Postage

Shared OFF

- Fields
- Summary By
- Detail Fields
- Report Sort Order

Done

- **Fields:**

Fields

Job

- Mailing Attributes
- Postage Pieces
- USPS Transaction
- Preparer
- MailOwner
- Permit Holders
- Publications
- PW Internal

Job Number	<input type="checkbox"/> OFF	Job ID	<input type="checkbox"/> OFF
Job Description	<input type="checkbox"/> OFF	Mail.Dat File Name	<input type="checkbox"/> OFF
Customer Ref ID	<input type="checkbox"/> OFF		

- Summary By
- Detail Fields
- Report Sort Order

The 'Fields' section contains virtually all fields that exist in a Mail.dat file, organized into various categories, which are listed in a vertical menu on the left side of the screen. Clicking on any of these categories will display the fields contained within that category.

Any field may be selected to be displayed in the report (as a column). To select a field, click on the field name or its associated toggle button. When a field is selected to appear on the report, its toggle button will display a value of ON.

i For a complete list of the available fields, refer to [APPENDIX 4](#) in this Guide.

i If fields in the 'Summary By' section have already been selected, some fields in the 'Fields' section may be disabled (ghosted).

- **Summary By:**

Fields

Summary By

When grouping is used, only numeric fields that can be totaled will be available for selection

<ul style="list-style-type: none"> Job Mailing Attributes Postage Pieces USPS Transaction Preparer MailOwner Permit Holders Publications PW Internal 	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">Job Number</td> <td style="width: 10%; text-align: center;"><input type="checkbox"/></td> <td style="width: 10%; text-align: center;">OFF</td> <td style="width: 25%;"></td> <td style="width: 10%; text-align: center;"><input type="checkbox"/></td> <td style="width: 10%; text-align: center;">OFF</td> </tr> <tr> <td>Job Description</td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;">OFF</td> <td>Job ID</td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;">OFF</td> </tr> <tr> <td>Customer Ref ID</td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;">OFF</td> <td>Mail.Dat File Name</td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;">OFF</td> </tr> </table>	Job Number	<input type="checkbox"/>	OFF		<input type="checkbox"/>	OFF	Job Description	<input type="checkbox"/>	OFF	Job ID	<input type="checkbox"/>	OFF	Customer Ref ID	<input type="checkbox"/>	OFF	Mail.Dat File Name	<input type="checkbox"/>	OFF		
Job Number	<input type="checkbox"/>	OFF		<input type="checkbox"/>	OFF																
Job Description	<input type="checkbox"/>	OFF	Job ID	<input type="checkbox"/>	OFF																
Customer Ref ID	<input type="checkbox"/>	OFF	Mail.Dat File Name	<input type="checkbox"/>	OFF																

Detail Fields

Report Sort Order

The 'Summary By' section contains fields for which the returned data will be summarized or grouped by on a report. The available fields are grouped into categories that are listed in a vertical menu on the left side of the screen. When a category is selected (clicked), its corresponding fields will display.

Click the corresponding toggle button to select or deselect a field. When a field is selected, its toggle button will display a value of ON.

i Selecting a field in the 'Summary By' section may disable selections previously made in the 'Fields' section.

- **Detail Fields:**

Fields

Summary By

Detail Fields

Fields

Proc Category	<input type="checkbox"/>	OFF	Line Type	<input type="checkbox"/>	OFF
Total Pieces	<input type="checkbox"/>	OFF	Date Time Created	<input type="checkbox"/>	OFF
Line Price	<input type="checkbox"/>	OFF	Line Subtotal Postage	<input type="checkbox"/>	OFF
Line Disc Total	<input type="checkbox"/>	OFF	Line Fee Total	<input type="checkbox"/>	OFF
Line Total Postage	<input type="checkbox"/>	OFF	Weight	<input type="checkbox"/>	OFF
Item Weight	<input type="checkbox"/>	OFF	Original Amt	<input type="checkbox"/>	OFF
Adj. Amt	<input type="checkbox"/>	OFF	Advertising Percent	<input type="checkbox"/>	OFF
LBS	<input type="checkbox"/>	OFF	Line Copy	<input type="checkbox"/>	OFF
Container Count	<input type="checkbox"/>	OFF	Bundle Count	<input type="checkbox"/>	OFF
Address Pieces	<input type="checkbox"/>	OFF	Sign	<input type="checkbox"/>	OFF
Entry Point	<input type="checkbox"/>	OFF	Category	<input type="checkbox"/>	OFF
Surcharge Indicator	<input type="checkbox"/>	OFF	Stmt. Line Number	<input type="checkbox"/>	OFF
Subscriber Copies	<input type="checkbox"/>	OFF	NSBSCBR	<input type="checkbox"/>	OFF
NSBSCBRGT10	<input type="checkbox"/>	OFF			

Report Sort Order

The 'Detail Fields' section contains additional fields that are intended to provide further detail in a report. Click the corresponding toggle button to select or deselect a field. When a field is selected, its' toggle button will display a value of ON; and

- **Report Sort Order:**

Fields

Summary By

Detail Fields

Report Sort Order

Available fields <input style="width: 100%;" type="text"/>	<input type="checkbox"/> → <input type="checkbox"/> ←	Order by fields <input style="width: 100%;" type="text"/>
Available detail fields <input style="width: 100%;" type="text"/>	<input type="checkbox"/> → <input type="checkbox"/> ←	Order by detail fields <input style="width: 100%;" type="text"/>

The 'Report Sort Order' section is used to define the display order of the selected fields within the report.

As fields are selected in the 'Fields' and 'Summary By' sections, they are automatically added to the first 'Available fields' stack located in the Report Sort Order section. Users can then move any or all of the available fields to the corresponding 'Order by fields' stack as desired.

As fields are selected in the 'Detail Fields' section, they are automatically added to the second 'Available fields' stack located in the Report Sort Order section. Users can then move any or all of the available fields to the corresponding 'Order by fields' stack as desired.

The field tiles that appear in both the 'Order by fields' *and* the 'Available fields' stacks will be included in the report. The fields shown in the 'Order by fields' stacks will appear first in the report, in the order they appear in each stack.

Any fields listed in the 'Available fields' stacks will also appear in the report in a pre-determined order, but they will appear in the report *after* the fields listed in the 'Order by fields' stacks. For this reason, it is recommended to move all the fields listed in each 'Available fields' stack to their corresponding 'Order by fields' stack to ensure the correct order of appearance in the report.

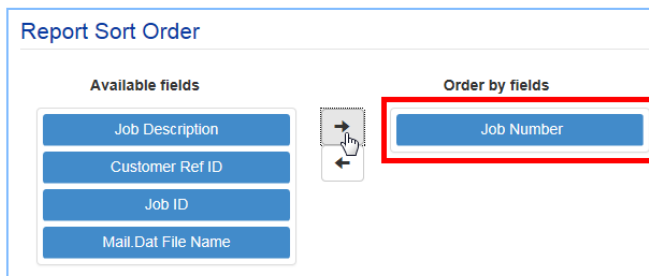
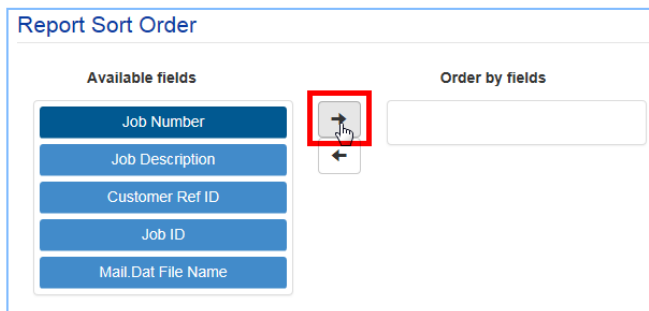
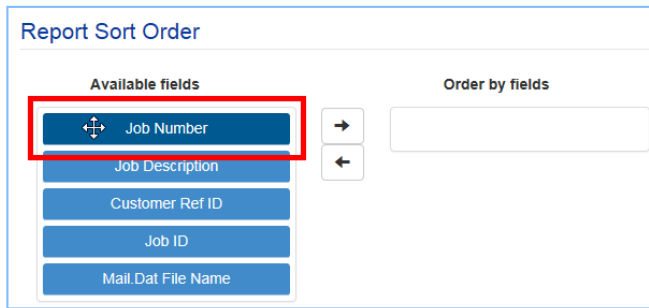
For additional information on using the 'Report Sort Order' section, please refer to [Using the 'Report Sort Order' Section](#).

USING THE 'REPORT SORT ORDER' SECTION

As fields are selected during the creation of a report definition, they are added to the 'Available fields' stack in the 'Report Order' section of the definition in the order they are chosen.

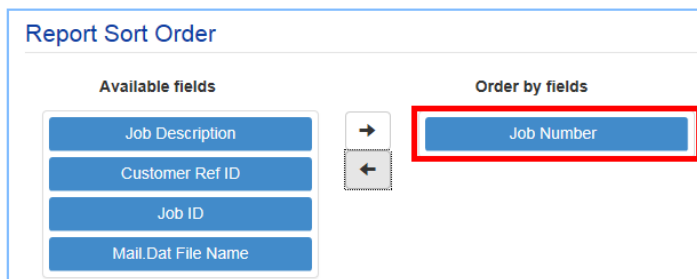
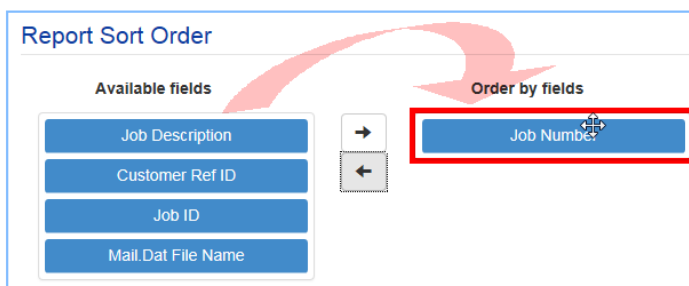
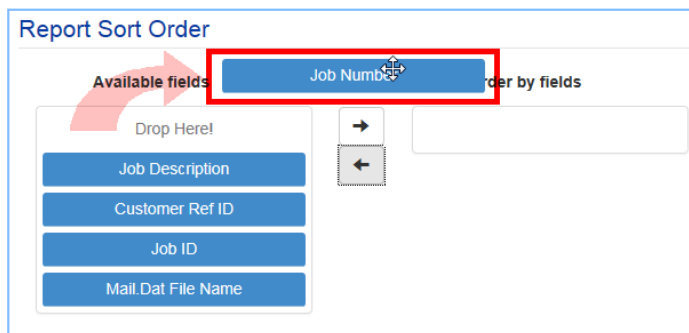
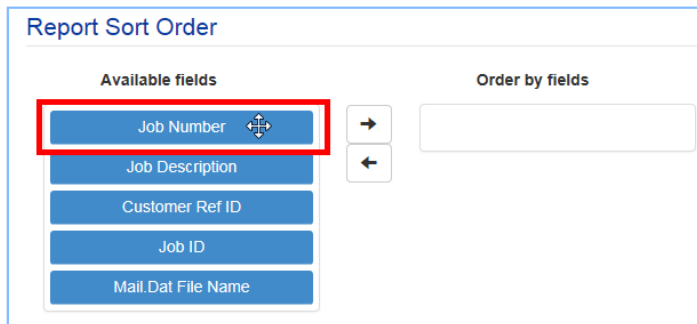
The selected/accumulated fields (referred to here as 'tiles'), can be placed in the 'Order by fields' stack using either of the following methods:

- Select a field by clicking on the tile (turning the tile dark blue in color), then click the right arrow;
or



Using PostalWeb

- Using the 'drag and drop' method. Select a field by moving the mouse cursor over the desired tile in the 'Available fields' stack, press and hold the left mouse button, and, keeping the left mouse button pressed, drag the tile into the 'Order by fields' stack, and then release the mouse button.



! *To remove a field tile from either stack, the field must be turned 'OFF' in the whichever section the field is located in the report definition (i.e. 'Field', 'Summary By' or the 'Detail Fields'). The associated field tile will automatically be removed from the stack.*

The field tiles that appear in both the 'Available fields' and the 'Order by fields' stacks will be included in the report. The fields shown in the 'Order by fields' stack will appear first in the report, in the order they appear in the stack. The top-most field tile on the 'Order by fields' stack will be displayed as the left-most column in the report.

Any fields listed in the 'Available fields' stack appear in the report in a pre-determined order, but they will appear in the report *after* the fields listed in the 'Order by fields' stack. For this reason, it is recommended to move all the fields listed in the 'Available fields' stack to the 'Order by fields' stack to ensure the correct order of appearance in the report.

Tiles in either stack may be moved to a different position vertically within the same stack using the 'drag and drop' method described earlier.

Using Report Sort Order for the Detail Postage Report Type

When the 'Detail Postage' report type is selected, additional sorting of the 'Detail Fields' is available.

The screenshot displays the 'Report Sort Order' configuration area. It is divided into four main sections: 'Fields', 'Summary By', 'Detail Fields', and 'Report Sort Order'. The 'Report Sort Order' section is highlighted in yellow and contains two pairs of stacks. The top pair consists of 'Available fields' and 'Order by fields', and the bottom pair consists of 'Available detail fields' and 'Order by detail fields'. The bottom pair is highlighted with a red border. Each stack is represented by a text input field and two arrow buttons (right and left) for moving tiles between the stacks.

The fields selected in the 'Detail Fields' section are added to the second 'Available detail fields' stack in the same way other fields are added to the first 'Available fields' stack. Any fields (i.e. tiles) placed in the 'Available detail fields' stack can be manipulated in the same way as previously discussed (refer to [Using the Report Order Section](#) for more information).

i *Field tiles cannot be moved between 'Available detail fields' stacks or available 'Order by detail fields' stacks.*

Create A Report Definition

To create or add a new report definition, perform the following:

1. In the *Manage Report Definitions* screen, click the **Add New Report Definition** button;

2. A blank *Manage Report Definition* screen will display;

3. Enter a name for the definition in the 'Report Definition Name' field. The name may contain special characters and has no minimum length;
4. Select a 'Report Type' from the pull down list provided;
5. If the report definition is to be shared with other PostalWeb users, turn the 'Shared' option ON (i.e. click the corresponding toggle button);
6. Select the desired fields to be used in the report from each of the available sections. Which sections are available (i.e. 'Fields', 'Summary By' and/or 'Detail Fields') is predicated on which Report Type was selected (refer to step 4 above);

7. Specify the order in which the fields are to appear on the report via the 'Report Sort Order' section (refer to [USING THE 'REPORT SORT ORDER' SECTION](#) for instructions);
8. Click the **Done** button to save the report definition.



Click the *DONE* button to save any updates made in the "Manage Report Definitions" screen! Navigating away from the screen at any time without first clicking the *DONE* button will cancel any work performed, whether creating a new definition or editing an existing report definition.

The screen will update and return to the *Manage Report Definitions* screen. The newly created report definition will be included in the list and a confirmation dialog will display.

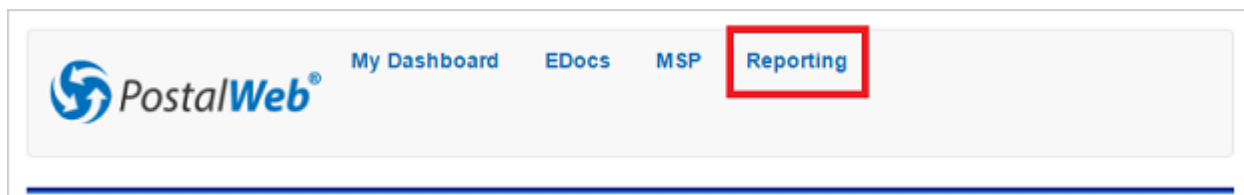


EXAMPLE – CREATING A REPORT DEFINITION

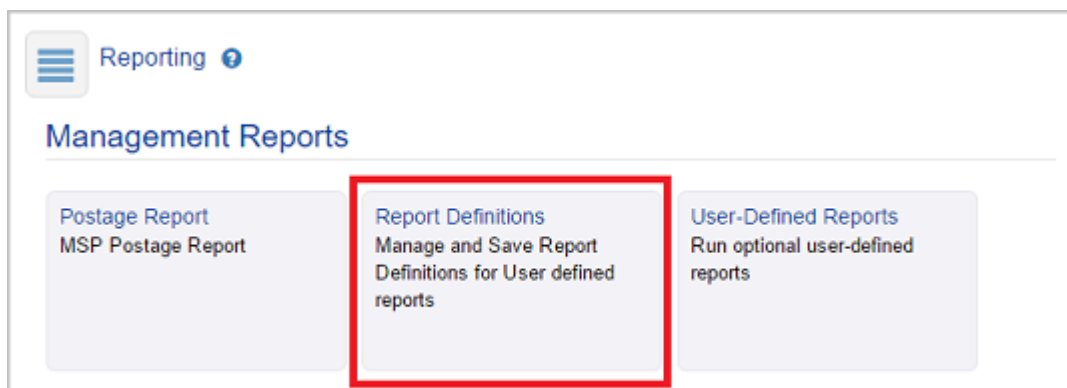
An MSP wants a report that lists the total mailing pieces and total weight summarized by the mailing date.

To create this report, perform the following:

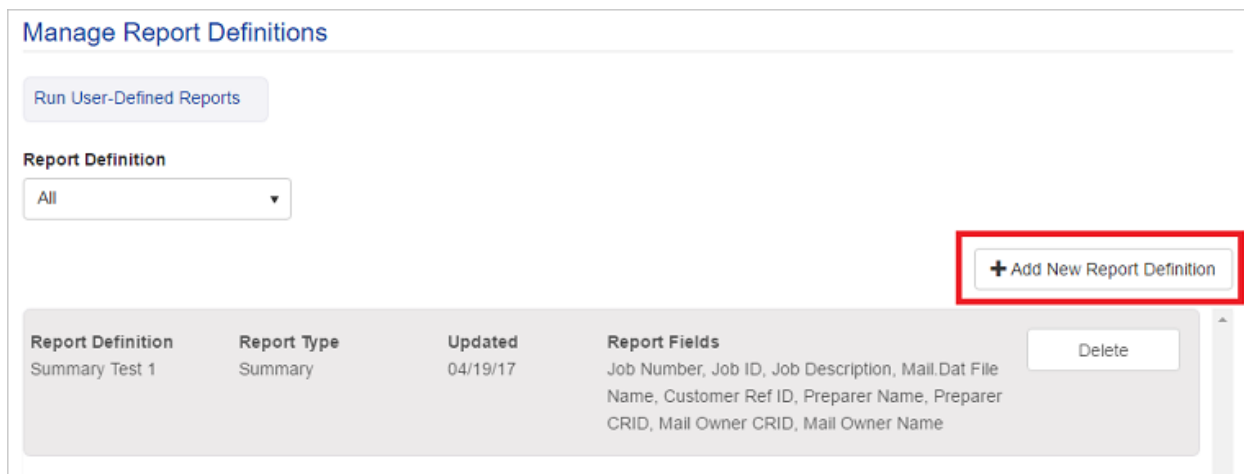
1. In PostalWeb, click the 'Reporting' top menu;



2. The *Management Reports* screen will display. Click the 'Report Definitions' tile;



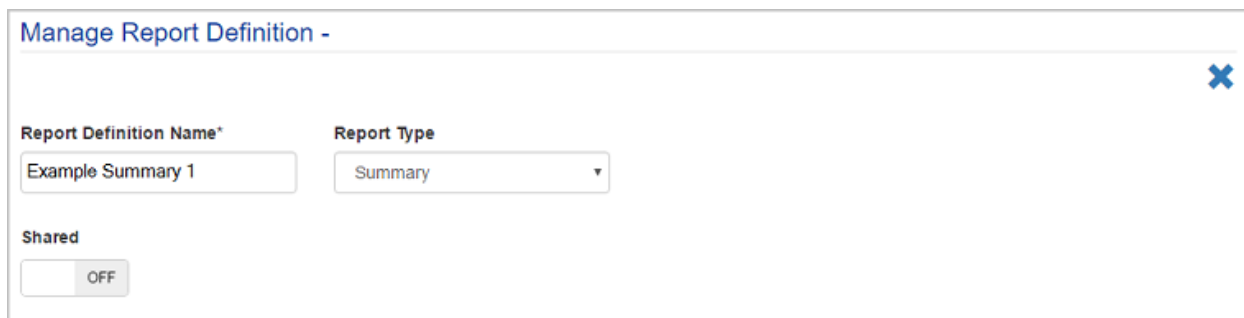
3. The *Manage Report Definitions* screen will display. Click the **Add New Report Definition** button;



4. A blank report definition screen will display. Name the report (e.g. “Example Summary 1”).

Determine what type of report definition is needed for this particular report (i.e. total mailing pieces and total weight summarized by the mailing date). In this example, a Summary report definition is needed. Select ‘Summary’ for the Report Type (if not already done so).

Also, decide whether or not this particular report should be shared/accessible by other users (in this particular example the report definition is not being shared);



5. Select (click) the 'Fields' section header **1** to expand it and display the available fields to add to the report definition;

The screenshot shows the 'Report Definition' interface. At the top, there is a 'Report Definition Name*' field containing 'Example Summary 1' and a 'Report Type' dropdown menu set to 'Summary'. Below this is a 'Shared' toggle switch set to 'OFF'. The main area is titled 'Fields' and contains a list of categories on the left: Job, Mailing Attributes, Postage Pieces, USPS Transaction, Preparer, MailOwner, Permit Holders, Publications, and PW Internal. The 'Postage Pieces' category is highlighted in yellow. To the right of the categories, there are several fields with toggle switches: Job Number (OFF), Job ID (OFF), Job Description (OFF), Mail.Dat File Name (OFF), and Customer Ref ID (OFF). Below the fields section are two buttons: 'Summary By' and 'Report Sort Order'.

6. Select (click) the 'Postage Pieces' category **2** to display the included fields. Select (i.e. turn ON) the 'Total Pieces' **3** and the 'Total Weight' **4** fields;

This screenshot shows the 'Fields' section expanded. The 'Postage Pieces' category is selected and highlighted in yellow. The fields listed are: Net Postage Due (OFF), Total USPS Adj. Postage (OFF), Postage Affixed Total (OFF), Rate Postage Affixed (OFF), Discount Amount (OFF), Rate Postage Affixed Desc (OFF), Total Pieces (ON), and Total Weight (ON). The 'Total Pieces' and 'Total Weight' fields are highlighted in yellow and have their toggle switches turned ON. Below the fields section are two buttons: 'Summary By' and 'Report Sort Order'.

- With all of the desired fields selected, select (click) the 'Summary By' section header **5** to display the available field options;

The screenshot shows the 'Fields' configuration interface. On the left is a vertical menu with categories: Job, Mailing Attributes, Postage Pieces, USPS Transaction, Preparer, MailOwner, Permit Holders, Publications, and PW Internal. The main area contains a table of fields with toggle switches:

Net Postage Due	<input type="checkbox"/> OFF	Total USPS Adj. Postage	<input type="checkbox"/> OFF
Postage Affixed Total	<input type="checkbox"/> OFF	Rate Postage Affixed	<input type="checkbox"/> OFF
Discount Amount	<input type="checkbox"/> OFF	Rate Postage Affixed Desc	<input type="checkbox"/> OFF
Total Pieces	<input checked="" type="checkbox"/> ON	Total Weight	<input checked="" type="checkbox"/> ON

At the bottom, the 'Summary By' section header is highlighted with a red box and a circled '5'. Below it is the 'Report Sort Order' section.

- Select (click) the 'USPS Transaction' category **6** to display the included fields. Select (i.e. turn ON) the 'Mailing Mailing Date' field **7**;

The screenshot shows the 'Fields' configuration interface with the 'Summary By' section expanded. A red message reads: "When grouping is used, only numeric fields that can be totaled will be available for selection". The left menu has 'USPS Transaction' highlighted with a yellow box and a circled '6'. The main area contains a table of fields:

CAPS Transaction Number	<input type="checkbox"/> OFF	Clerk Initials	<input type="checkbox"/> OFF
Transaction Number	<input type="checkbox"/> OFF	Mailing Group ID	<input type="checkbox"/> OFF
CAPS Account	<input type="checkbox"/> OFF	Payment Date Time	<input type="checkbox"/> OFF
Mailing Mailing Date	<input checked="" type="checkbox"/> ON	Mail Arrival Date Time	<input type="checkbox"/> OFF
Closing Date	<input type="checkbox"/> OFF	PSID	<input type="checkbox"/> OFF

The 'Mailing Mailing Date' field is highlighted with a yellow box and a circled '7', and its toggle switch is turned ON. At the bottom is the 'Report Sort Order' section.

9. With all of the necessary data fields and summary by fields selected, select (click) the 'Report Sort Order' section header **8** to determine the order of appearance for each field in the report definition (and ultimately the resulting report);

Fields

Summary By

When grouping is used, only numeric fields that can be totaled will be available for selection

Job

Mailing Attributes

Postage Pieces

USPS Transaction

Preparer

MailOwner

Permit Holders

Publications

PW Internal

CAPS Transaction Number OFF

Transaction Number OFF

CAPS Account OFF

Mailers Mailing Date ON

Closing Date OFF

Clerk Initials OFF

Mailing Group ID OFF

Payment Date Time OFF

Mail Arrival Date Time OFF

PSID OFF

Report Sort Order **8**

10. Move the selected fields from the 'Available fields' stack to the 'Order by fields' stack in the order they should display on the report;

Report Sort Order

Available fields

Total Pieces

Total Weight

Mailers Mailing Date

→

←

Order by fields

Mailers Mailing Date

Total Pieces

Total Weight

11. When finished, click the **Done** button to save the report definition.

Using the newly created report definition (i.e. “Example Summary 1”) within the [User-Defined Reports](#) feature , the resulting report would display as follows:

Reporting ⓘ

User-Defined Reports

🔍 Show

📄 Export to Excel 📄 Export to PDF

Example Summary 1

Mailers Mailing Date	Total Pieces	Total Weight
05/01/2016	1,687	179
06/06/2016	1,696	180
06/29/2016	1,691	180
	5,074	539

⏪ ◀ 1 ▶ ⏩ 50 items per page 1 - 3 of 3 items

After a report definition has been created, if the user wishes to generate a user-defined report using the newly created report definition (or any other report definition), they can access the *User-Defined Reports* screen to do so by clicking the **Run User-Defined Reports** button. This button is located at the top of the *Manage Reports Definition* screen.

Manage Report Definitions

Run User-Defined Reports

Report Definition: All

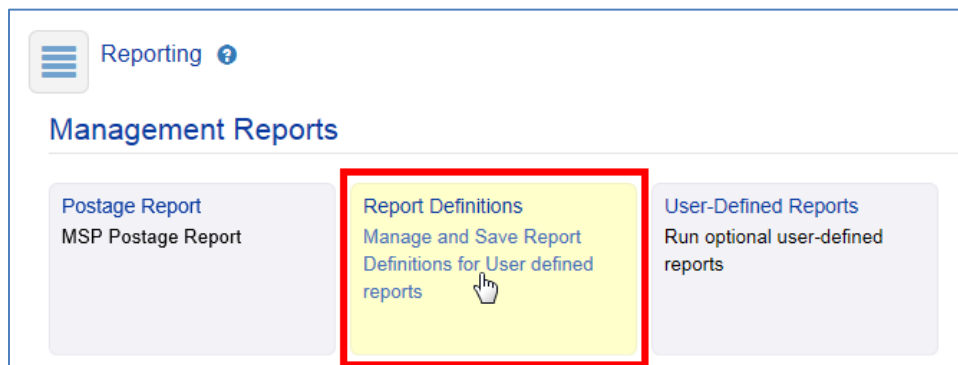
+ Add New Report Definition

Report Definition	Report Type	Updated	Report Fields	Delete
Summary Test 1	Summary	04/19/17	Job Number, Job ID, Job Description, Mail.Dat File Name, Customer Ref ID, Preparer Name, Preparer CRID, Mail Owner CRID, Mail Owner Name	Delete

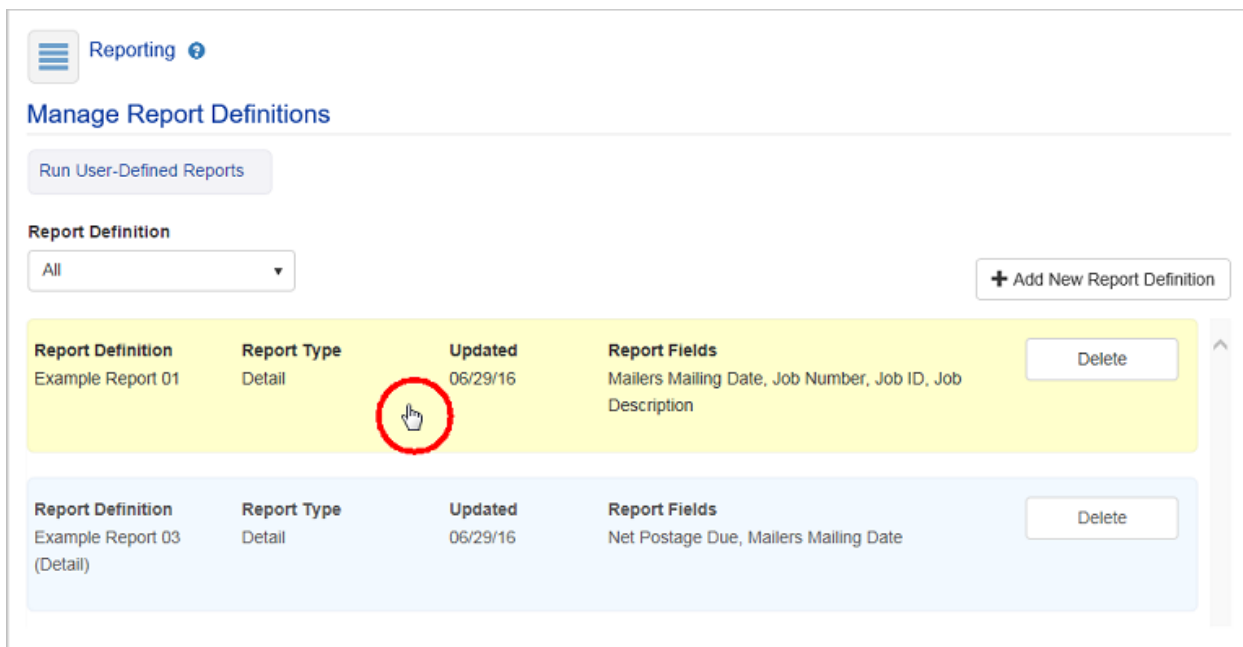
Edit A Report Definition

To edit an existing report definition, perform the following:


1. From the *Management Reports* screen, select (click) the 'Report Definitions' tile;



2. The *Manage Report Definitions* screen will display, with all of the existing report definitions listed. Locate the name of the desired report definition and click on the associated colored tile;



3. The *Manage Report Definition* screen for the selected report definition (e.g. "Example Report 01") will display. Any component of the displayed report definition may be edited. After the displayed report definition has been edited, click the **Done** button to save the changes.

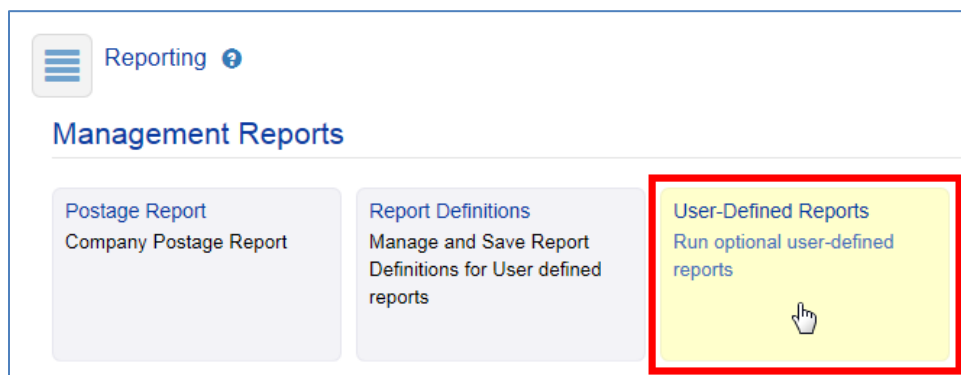
 **Navigating away from the screen at any time without first clicking the *DONE* button will result in the loss of any changes made to the report definition.**

USER-DEFINED REPORTS

The User-Defined Reports option allows users to create reports using the previously created report definitions. User-defined reports cannot be generated without a report definition selected.

With the report definition selected, the user-defined report can be generated using data from a particular time frame (i.e. start and end dates). Other search criteria and/or filters may also be applied to further narrow the report results.

To generate a user-defined report, navigate to the *Management Reports* screen and select the 'User-Defined Reports' tile; or...



... Click the **Run User-Defined Reports** button located in the *Manage Report Definitions* screen.



The *User-Defined Reports* screen will display. This screen contains a number of filters; as well as, a drop down list of the existing report definitions to choose from.

The screenshot shows the 'User-Defined Reports' interface. At the top left, there is a 'Reporting' header with a menu icon and a help icon. Below this is the title 'User-Defined Reports' and a 'Manage Report Definitions' button. A 'Hide' button with a magnifying glass icon is in the top right. The main area contains several filter fields: 'Start Date' (11/02/2016), 'End Date' (11/02/2016), 'Customer Ref ID' (Customer Ref ID), 'Job ID' (Job ID), 'Job Number' (Job Number), 'Permit Number' (Permit Number), 'Report Definition' (a dropdown menu), and 'Mail Owner' (a dropdown menu). At the bottom right are 'Reset' and 'Run Report' buttons.

- **Start Date and End Date:** Specifying one or both of these dates defines the period used to identify the data to be used in the report;
- **Customer Ref ID:** The CAPS Customer Reference ID (not to be confused with a 'CRID');
- **Job ID, Job Number, Permit Number and Mail Owner:** As many of these filters may be used to include or exclude the desired data in a report; and
- **Report Definition (REQUIRED):** A drop down list of previously created report definitions. Select the report definition to be used with the user-defined report being created/generated.



If at any time the user wishes to review or edit a particular report definition before selecting it for a user-defined report, they can easily return to the "Manage Report Definitions" screen (where all of the existing report definitions are listed), by clicking the MANAGE REPORT DEFINITIONS button located near the top of the "User-Defined Reports" screen (see image above).

In addition, the screen contains the following function buttons:

- **Reset button:** Clicking this button clears previously set filters and resets the start and end dates to the current date;
- **Run Report button:** Clicking this button causes a report to be generated using the currently configured filters and the selected report definition; and
- **Show/Hide button:** Shows or hides the filters on the screen.

When the **Run Report** button is clicked, the screen will update. The filters will become hidden on the screen and the report results will display below the filters area. If the generated report contains data, **Export to Excel** and **Export to PDF** buttons will also displayed.

The screenshot shows a web interface for reporting. At the top left, there is a 'Reporting' header with a menu icon. Below it is the section 'User-Defined Reports' with a 'Manage Report Definitions' button. To the right is a 'Show' button with a search icon. Below these are two buttons: 'Export to Excel' and 'Export to PDF'. The main content is titled 'Example Report 03 (Detail)' and contains a table with two columns: 'Mailing Date' and 'Net Postage Due'. The table lists 12 rows of data, with a total of 4,022.61 at the bottom. Below the table is a pagination control showing '1' of 21 items, '50' items per page, and '1 - 21 of 21 items'.

Mailing Date	Net Postage Due
03/01/2016	150.09
03/01/2016	150.13
03/01/2016	153.55
03/01/2016	157.29
03/01/2016	269.54
03/13/2016	544.77
03/27/2016	151.05
03/27/2016	151.14
03/27/2016	160.50
03/27/2016	165.85
03/27/2016	253.90
4,022.61	

i After reviewing the report results, if the user wishes to edit the report definition used (or create a new one), they can easily return to the "Manage Report Definitions" screen (where all of the existing report definitions are listed), by clicking the **MANAGE REPORT DEFINITIONS** button located near the top of the "User-Defined Reports" screen (see image above).

Clicking the **Export to Excel** button generates an Excel file of the displayed report that can be saved outside of the MSP's PostalWeb site.

The screenshot shows the 'Reporting' section of the PostalWeb interface. Under 'User-Defined Reports', there is a search bar with a 'Show' button. Below this, two buttons are visible: 'Export to Excel' (highlighted with a red box) and 'Export to PDF'. Below the buttons, the report title 'Example Report 03 (Detail)' is shown. A table with two columns, 'Mailing Date' and 'Net Postage Due', is partially visible, showing two rows of data.

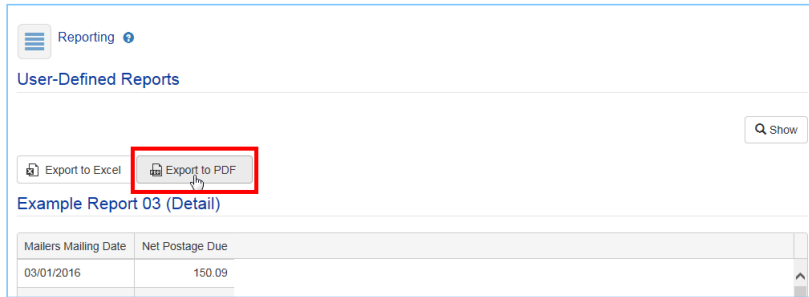


The screenshot shows an Excel spreadsheet titled 'Example Report 03 (Detail)'. The spreadsheet contains the following data:

Mailing Date	Net Postage Due
03/01/2016	150.09
03/01/2016	150.13
03/01/2016	153.55
03/01/2016	157.29
03/01/2016	269.54
03/13/2016	544.77
03/27/2016	151.05
03/27/2016	151.14
03/27/2016	160.50
03/27/2016	165.85
03/27/2016	253.90
05/02/2016	129.73
05/02/2016	153.78
05/02/2016	158.46
05/02/2016	165.16
05/02/2016	248.02
06/07/2016	150.98
06/07/2016	153.17
06/07/2016	153.71
06/07/2016	167.76
06/07/2016	234.03
Totals	4,022.61
Total Count: 21	

Using PostalWeb

Clicking the **Export to PDF** button generates a PDF file of the displayed report that can be saved outside of the MSP's PostalWeb site.



The generated report features the PostalWeb logo at the top left. The title 'Example Report 03 (Detail)' is centered, with the date and time '06/30/2016 04:19 AM' on the right. Below the title, the report covers the period 'From 02/01/2016 - Thru 06/30/2016' for 'Company Name: Window Book, Inc'. The main content is a table with two columns: 'Mailing Mailing Date' and 'Net Postage Due'. The table lists 20 rows of data, ending with a 'Totals' row showing a net postage due of 4,022.61.


Mailing Mailing Date	Net Postage Due
03/01/2016	150.09
03/01/2016	150.13
03/01/2016	153.55
03/01/2016	157.29
03/01/2016	269.54
03/13/2016	544.77
03/27/2016	151.05
03/27/2016	151.14
03/27/2016	160.50
03/27/2016	165.85
03/27/2016	253.90
05/02/2016	129.73
05/02/2016	153.78
05/02/2016	158.46
05/02/2016	165.16
05/02/2016	248.02
06/07/2016	150.98
06/07/2016	153.17
06/07/2016	153.71
06/07/2016	167.76
06/07/2016	234.03
Totals	4,022.61


APPENDIX 1 – MENUS & ACCESSIBILITY

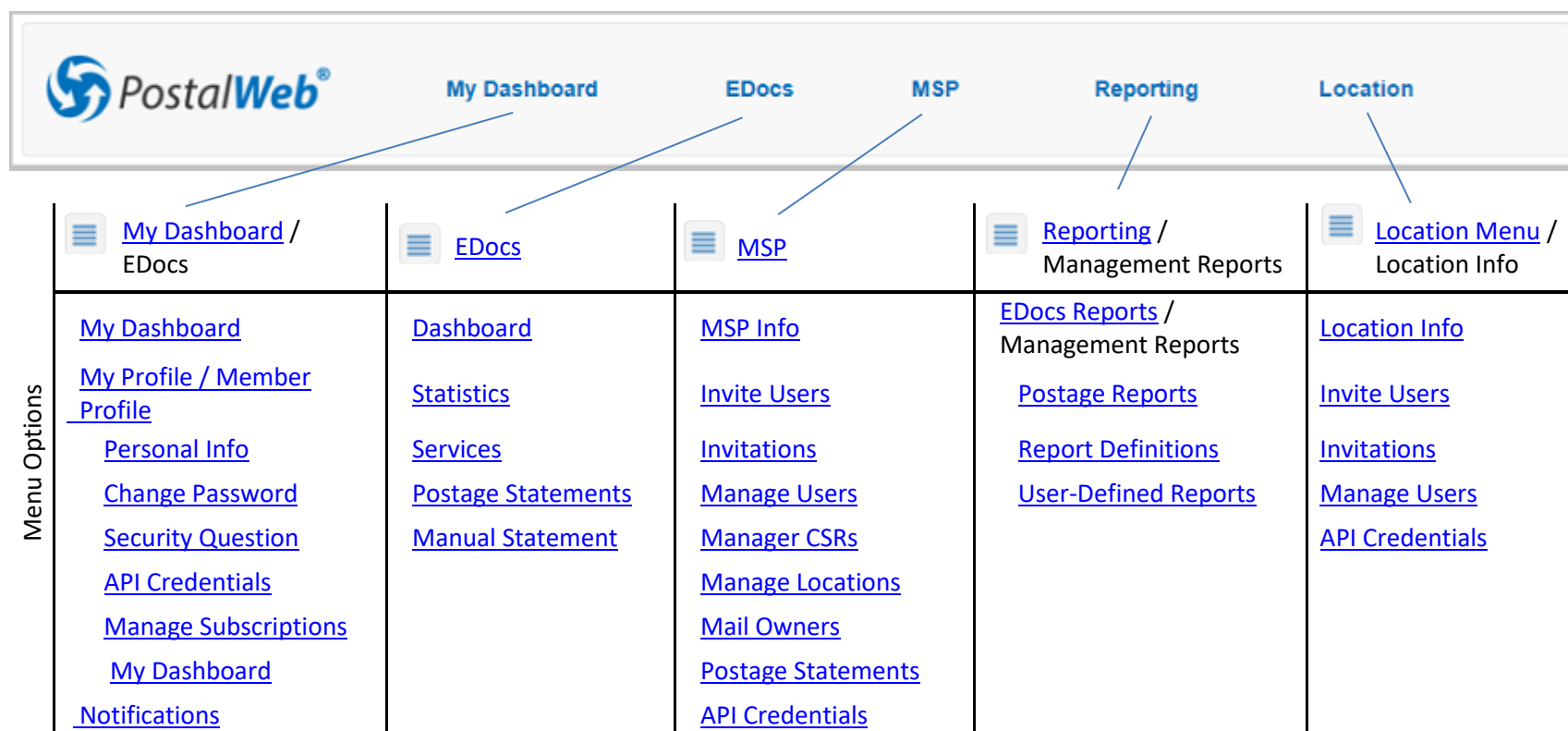
The current PostalWeb menu structure (menus and menu options) is provided in this appendix for easy reference. In addition, this Appendix also provides which of those menus/menu options are accessible from the various PostalWeb roles that can be assigned to users. For a detailed description of each role, refer to the [ROLES](#) section in this Guide.

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PostalWeb Menu Structure At-A-Glance

Below is a diagram that displays all of the available menus and their respective menu options (accessible by clicking the side menu icon ) in PostalWeb as of May 2017.

 **Not all users have access to the menus shown below. Whether or not a user has access to a particular menu is predicated on the role assigned to them by a Company Admin, along with which features are enabled in their member profile (refer to [Menu Accessibility](#) for more information).**



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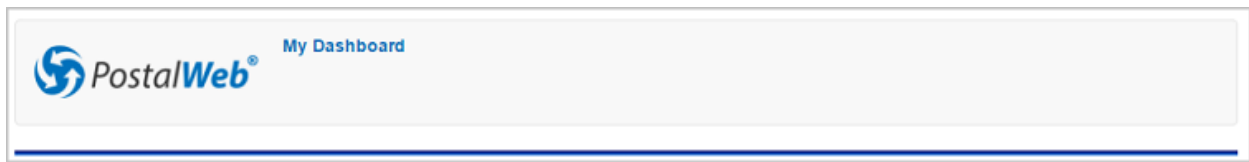
Menu Accessibility

Menu and feature accessibility in PostalWeb is predicated on the roles assigned to the user and whether the 'eDocs Application' and 'EDOCS Reporting' service have been turned ON (i.e. enabled) in their member profiles by a Company Admin.

This section provides the possible menu and feature sets available to users based on their role and individual application and service settings.

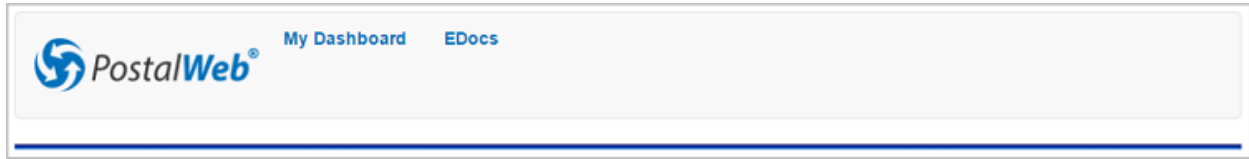
 **A description of each available role is provided in the [ROLES](#) section of this Guide.**

ROLE(S): Company User
(*'eDocs Application' and the 'EDOCS Reporting' service NOT enabled (i.e. OFF)*)



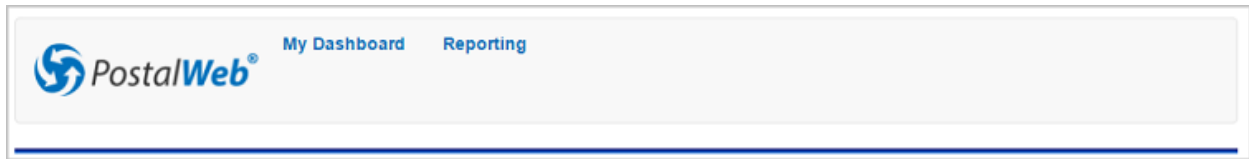
Member Profile
Personal Info
Change Password
Security Question
API Credentials
Manage Subscriptions

ROLE(S): Company User
(‘EDocs Application’ enabled (i.e. ON), ‘EDOCS Reporting’ service NOT enabled (i.e. OFF))



My Dashboard	EDocs
My Dashboard / EDOCS	Dashboard
My Profile / Member Profile	Statistics
Personal Info	Postage Statements
Change Password	
Security Question	
API Credentials	
Manage Subscriptions	
My Dashboard	
Notifications	

ROLE(S): Company Location Manager, Company Location User, Company CSR, and IT Personnel
(‘EDocs Application’ and ‘EDOCS Reporting’ service NOT enabled (i.e. OFF))



Member Profile	Reporting
Personal Info	EDocs Reports / Management Reports
Change Password	Postage Reports
Security Question	
API Credentials	
Manage Subscriptions	

ROLE(S): Company Location User, Company CSR, and IT Personnel
(‘EDocs Application’ enabled (i.e. ON), ‘EDOCS Reporting’ service NOT enabled (i.e. OFF))



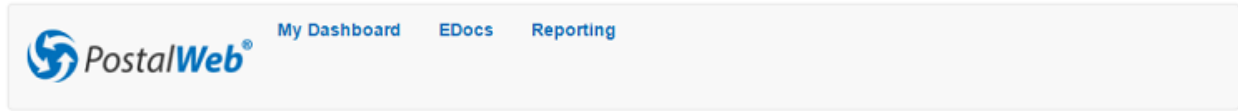
My Dashboard	EDocs	Reporting
My Dashboard / EDOCS	Dashboard	EDocs Reports / Management Reports
My Profile / Member Profile	Statistics	Postage Reports
Personal Info	Postage Statements	
Change Password		
Security Question		
API Credentials		
Manage Subscriptions		
My Dashboard		
Notifications		

ROLE(S): Company Location Manager, Company User, Company Location User, Company CSR, and IT Personnel
(‘EDocs Application’ NOT enabled (i.e. OFF), ‘EDOCS Reporting’ service enabled (i.e. ON))



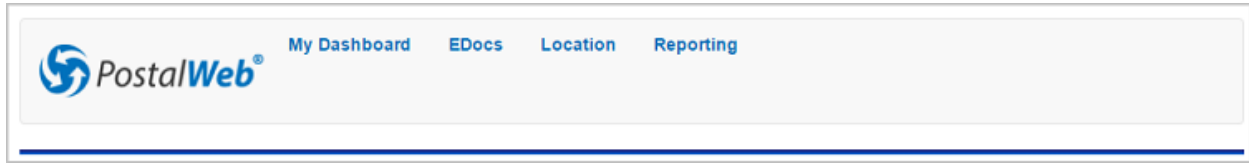
Member Profile	Reporting
Personal Info	EDocs Reports / Management Reports
Change Password	Postage Reports
Security Question	Report Definitions
API Credentials	User-Defined Reports
Manage Subscriptions	

ROLE(S): Company User, Company Location User, Company CSR, and IT Personnel
(‘EDocs Application’ and ‘EDOCS Reporting’ service enabled (i.e. ON))



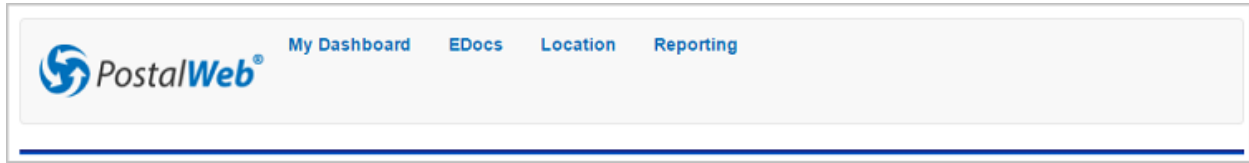
My Dashboard	EDocs	Reporting
My Dashboard / EDOCS	Dashboard	EDocs Reports / Management Reports
My Profile / Member Profile	Statistics	Postage Reports
Personal Info	Postage Statements	Report Definitions
Change Password		User-Defined Reports
Security Question		
API Credentials		
Manage Subscriptions		
My Dashboard		
Notifications		

ROLE(S): Company Location Manager
(‘EDocs Application’ enabled (i.e. ON) and ‘EDOCS Reporting’ service NOT enabled (i.e. OFF))



My Dashboard	EDocs	Location	Reporting
My Dashboard / EDOCS	Dashboard	Location Info	EDocs Reports / Management Reports
My Profile / Member Profile	Statistics	Invite Users	Postage Reports
Personal Info	Postage Statements	Invitations	
Change Password		Manage Users	
Security Question		API Credentials	
API Credentials			
Manage Subscriptions			
My Dashboard			
Notifications			

ROLE(S): Company Location Manager
(‘EDocs Application’ and ‘EDOCS Reporting’ service enabled (i.e. ON))



My Dashboard	EDocs	Location	Reporting
My Dashboard / EDOCS	Dashboard	Location Info	EDocs Reports / Management Reports
My Profile / Member Profile	Statistics	Invite Users	Postage Reports
Personal Info	Postage Statements	Invitations	Report Definitions
Change Password		Manage Users	User-Defined Reports
Security Question		API Credentials	
API Credentials			
Manage Subscriptions			
My Dashboard			
Notifications			

ROLE(S): Company Admin
(‘EDocs Reporting’ service is NOT enabled (i.e. OFF))



My Dashboard	EDocs	MSP	Reporting
My Dashboard / EDOCS	Dashboard	MSP Info	EDocs Reports / Management Reports
My Profile / Member Profile	Statistics	Invite Users	Postage Reports
Personal Info	Services	Invitations	
Change Password	CSR Statement Release	Manage Users	
Security Question	Postage Statements	Manage CSRs	
API Credentials	Manual Statement	Manage Locations	
Manage Subscriptions		Mail Owners	
My Dashboard		API Credentials	
Notifications			

 **The ‘EDocs Application’ feature cannot be turned OFF (i.e. disabled) for the Company Admin role.**

ROLE(S): Company Admin
(‘EDOCS Reporting’ service enabled (i.e. ON))



My Dashboard	EDocs	MSP	Reporting
My Dashboard / EDOCS	Dashboard	MSP Info	EDocs Reports / Management Reports
My Profile / Member Profile	Statistics	Invite Users	Postage Reports
Personal Info	Services	Invitations	Report Definitions
Change Password	CSR Statement Release	Manage Users	User-Defined Reports
Security Question	Postage Statements	Manage CSRs	
API Credentials	Manual Statement	Manage Locations	
Manage Subscriptions		Mail Owners	
My Dashboard		API Credentials	
Notifications			

APPENDIX 2 - TROUBLESHOOTING

This Appendix deals with troubleshooting some of the more common issues that can occur while using PostalWeb.



If an issue is being experienced that is not listed here, contact Window Book's Technical Support Team. [Click here](#) for contact information.

LOGIN PROBLEMS



This section assumes the user has verified that the login credentials being used are correct and valid.

A common reason for a failed login is that the browser's security and/or privacy settings are set too high. If the device being used is controlled through an MSP that has an IT department, contact the IT department for assistance; otherwise, refer to the information provided for assistance.



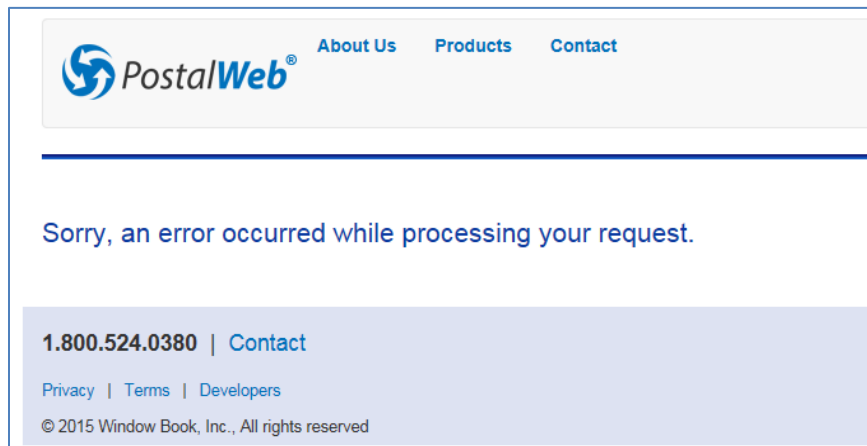
Users should defer to their own company's policies regarding security and browser settings.

There are two general types of problems that may be encountered after clicking the **Log In** button (especially if logging in for the first time):

- [A general error is displayed](#); or
- [The website appears to freeze or stall without completing the login.](#)

Error Displays After the Login Button is Clicked


If an error is returned similar to what is displayed in the screen image below, there are possible solutions based on the browser being used.

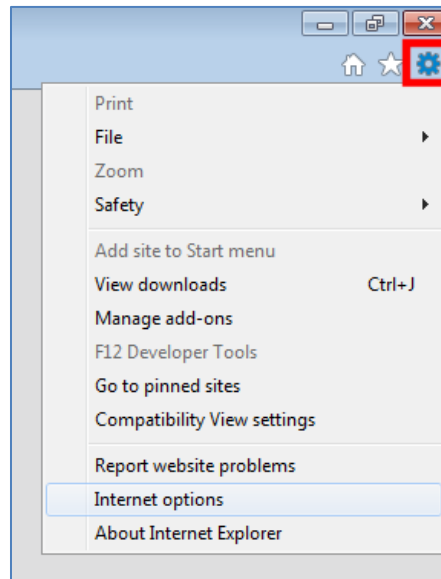


INTERNET EXPLORER

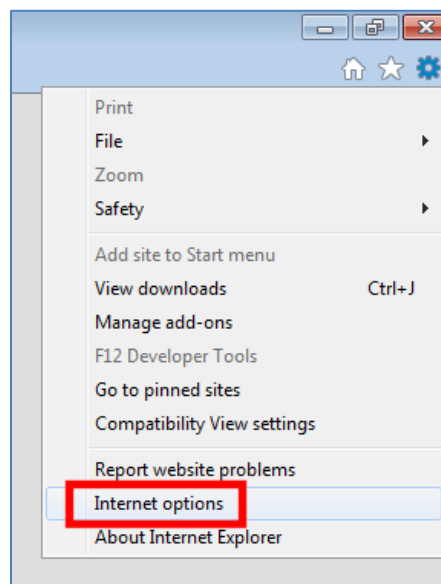
One solution may be to lower the security settings of the browser, if possible.

 **The following instructions are for Internet Explorer 11.**

1. Open Internet Explorer;
2. Click the gear icon () in the upper right corner of the browser window;

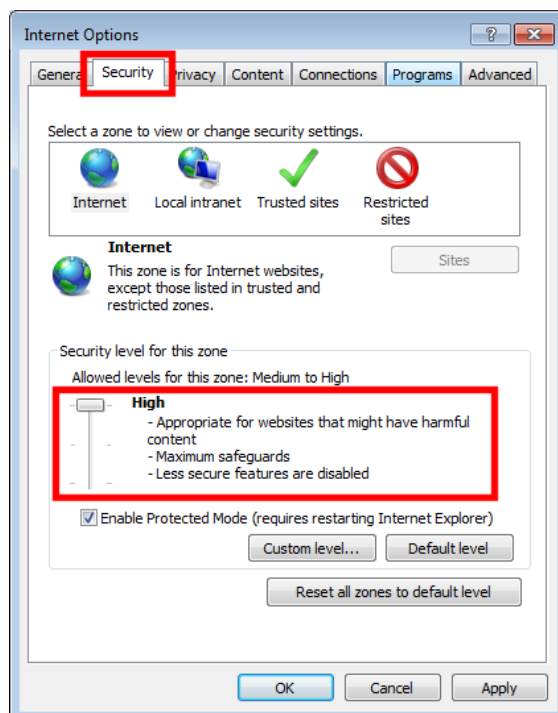


3. A menu will display. Select 'Internet options';

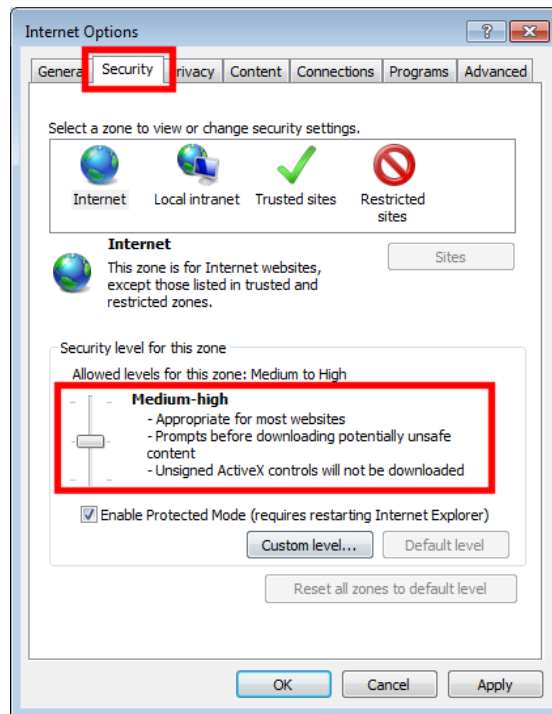


 **Other versions of Internet Explorer use different methods to display the 'Internet Options'.**


4. The *Internet Options* dialog box will open. Click the 'Security' tab; and



5. Check the Security level setting. If the security level setting is at 'High', attempt to slide the control down to 'Medium' (the default setting).




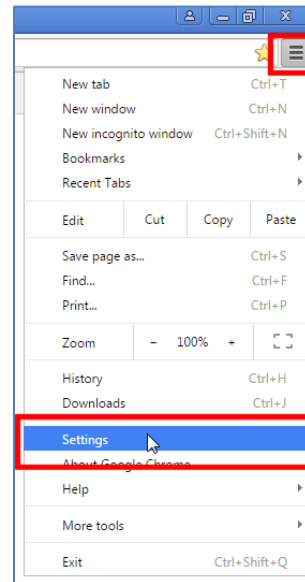
 ***Users should defer to their own company's policies regarding security and browser settings.***

 ***Windows permissions for the credentials used to log on to the computer that the browser resides on may be set so that this control is ghosted and/or cannot be changed. In this case someone with the appropriate permissions must be contacted to change the setting.***

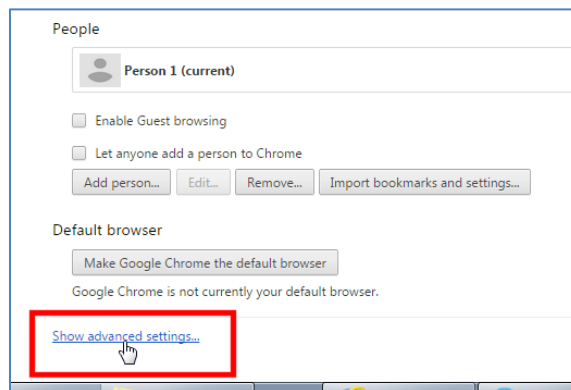
CHROME USERS

An error may be displayed if JavaScript has been disabled. To check the JavaScript setting, do the following:

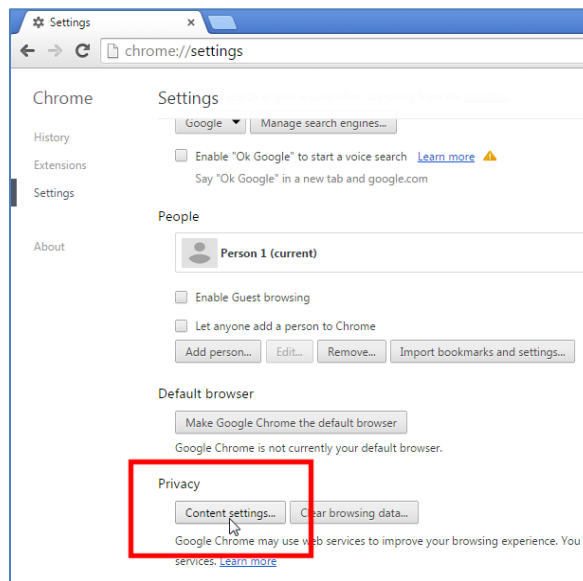
1. Open the Chrome browser;
2. Click on the  icon in the upper right corner of the browser window and select 'Settings' on the dialog box that opens;



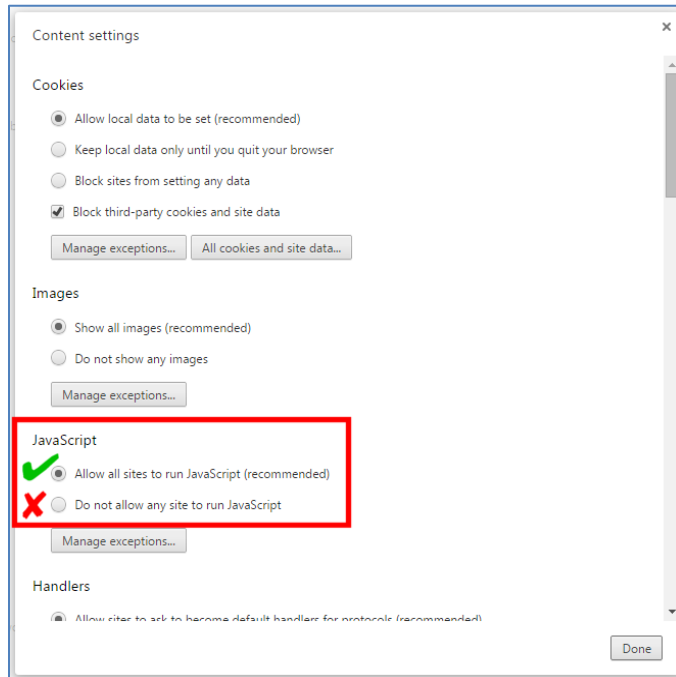
3. At the bottom of the web page, click the 'Show advanced settings' link;



4. Find the 'Privacy' section and click the 'Content settings...' button; and



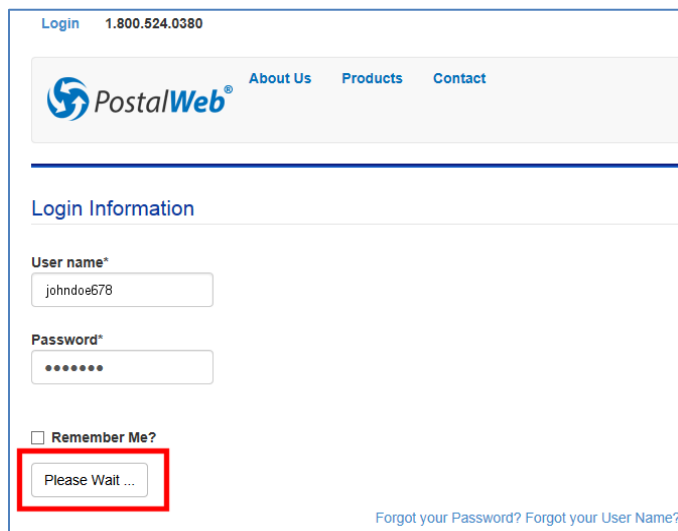
5. On the screen that opens, check the 'JavaScript' setting. Make sure the 'Do not allow any site to run JavaScript' is not selected. If you must keep the setting at 'Do not allow any site to run JavaScript', then use the **Manage Exceptions** button to add the PostalWeb site.



 **Users should defer to their own company's policies regarding security and browser settings.**

Freezing or Stalling After the Login Button is Clicked


If the PostalWeb site appears to stall or freeze after clicking the **Log In** button and the 'Please Wait' text is displayed for more than 30 seconds, there are possible solutions based on the browser being used.

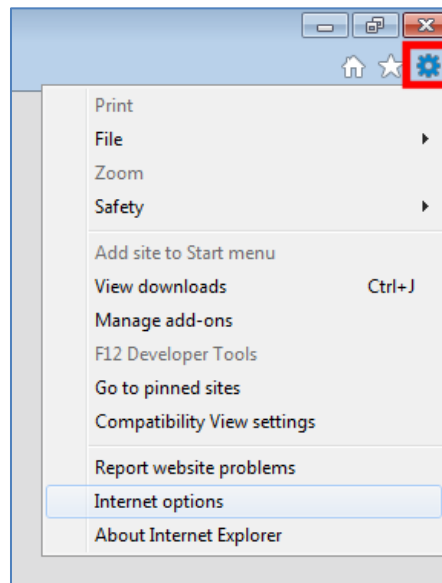


INTERNET EXPLORER USERS

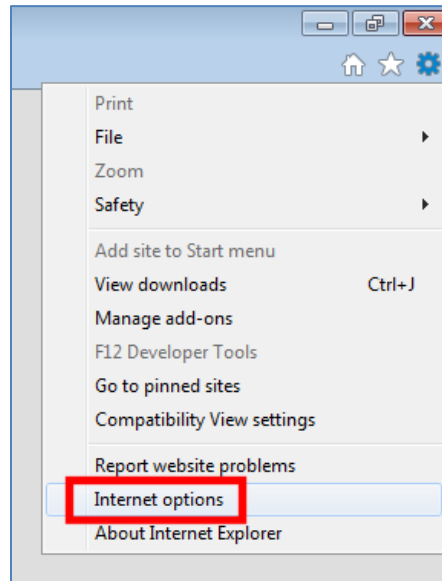
The Internet Explorer 'Privacy' settings may be set too high. To lower the settings, perform the following:

 **The following instructions are for Internet Explorer 11.**

1. Open Internet Explorer;
2. Click on the gear icon () in the upper right corner of the browser window;

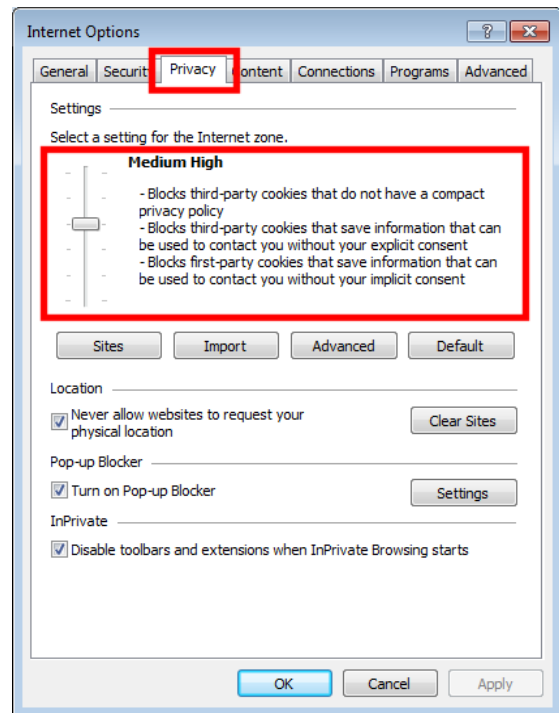


3. A menu will display. Select 'Internet options';




 **Other versions of Internet Explorer use different methods to get to the 'Internet options'.**

4. The *Internet Options* dialog box will open. Click the 'Privacy' tab; and
5. If the setting is higher than 'Medium High', the PostalWeb site will not be able to use cookies and will stall or freeze upon login. If possible, select a setting no higher than 'Medium High'.




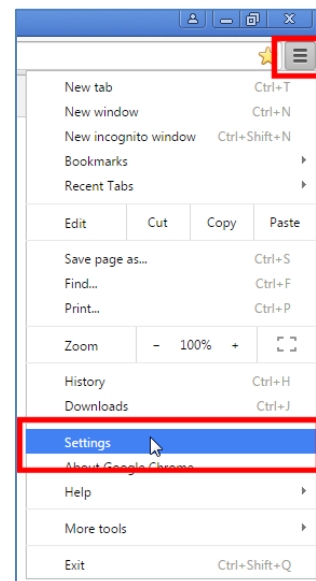
 ***Users should defer to their own company's policies regarding security and browser settings.***

 ***Windows permissions for the credentials used to log on to the computer that the browser resides on may be set so that this control is ghosted and/or cannot be changed. In this case someone with the appropriate permissions must be contacted to change the setting.***

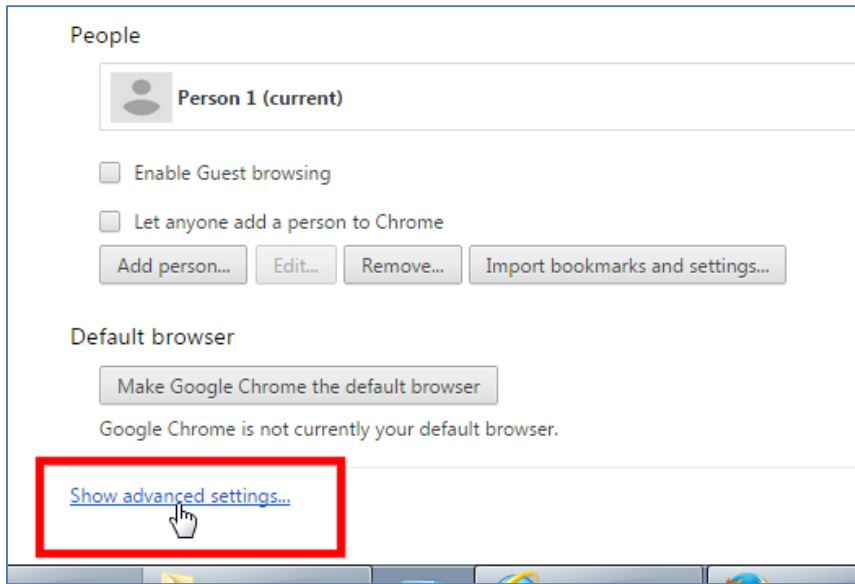
CHROME USERS

To check the cookie settings in a Chrome browser, do the following:

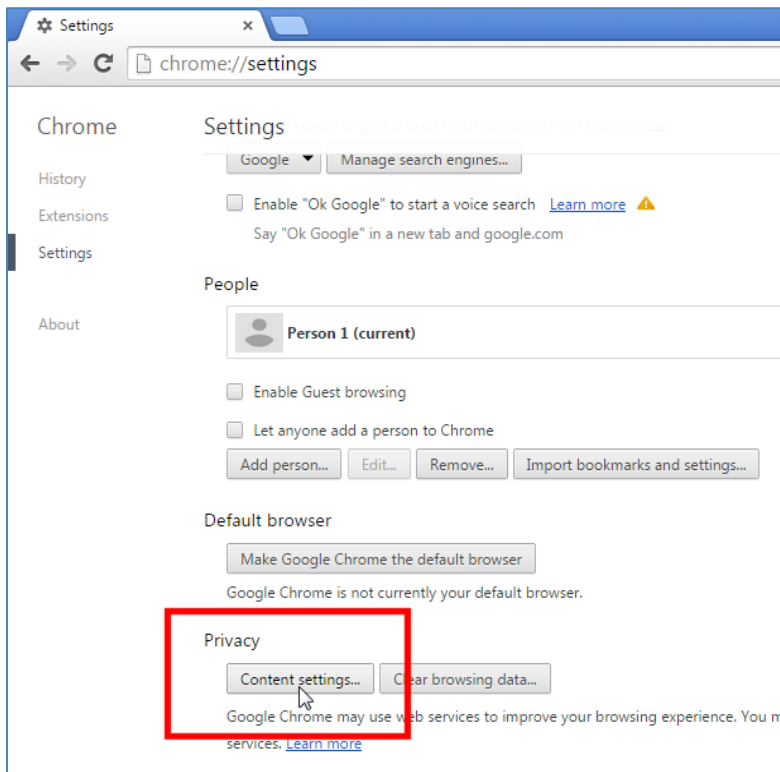
1. Open the Chrome browser;
2. Click on the  icon in the upper right corner of the browser window and select 'Settings' on the dialog box that opens;



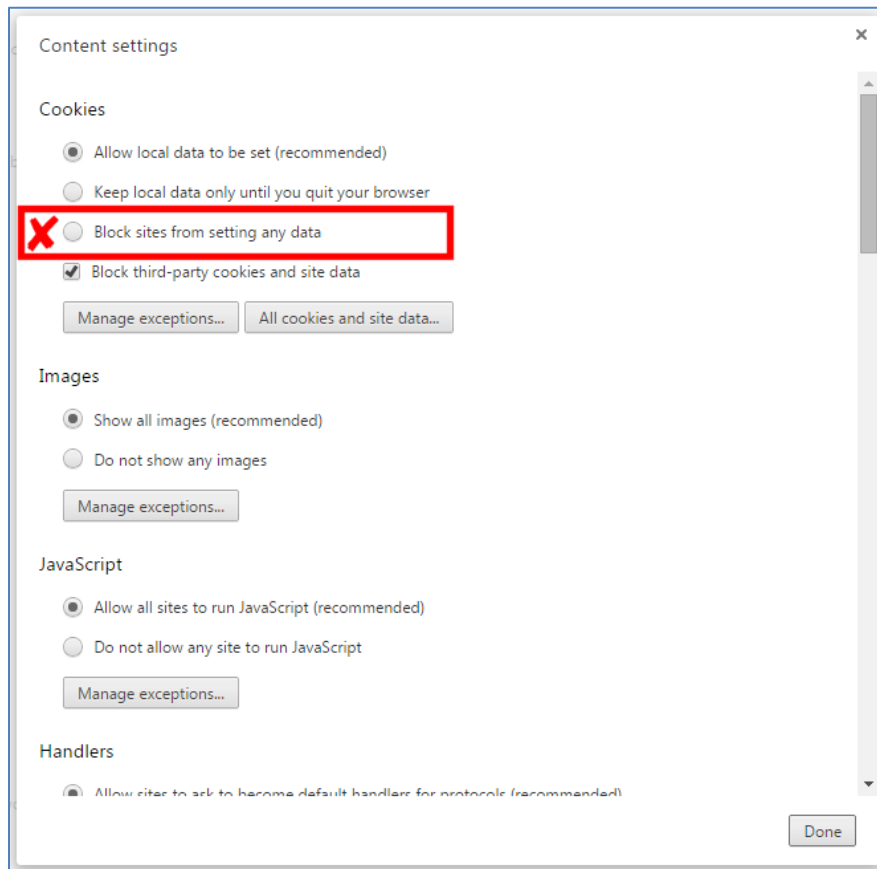
3. At the bottom of the web page, click the 'Show advanced settings' link;



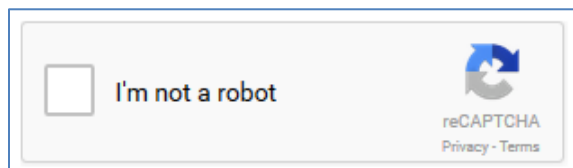
4. Find the 'Privacy' section and click the **Content settings...** button; and



5. The *Content settings* screen will open. In the 'Cookies' sections, verify the 'Block sites from setting any data' is NOT selected. If selected, the 'Block sites from setting any data' selection will prevent PostalWeb from completing the login process.



'I'M NOT A ROBOT' WIDGET DOES NOT APPEAR IN BROWSER



The 'I'm not a robot' widget often appears at the beginning of a process such as resetting a password or retrieving a user name. When it appears, the 'I'm not a robot' widget must be completed in order to continue with the process at hand.

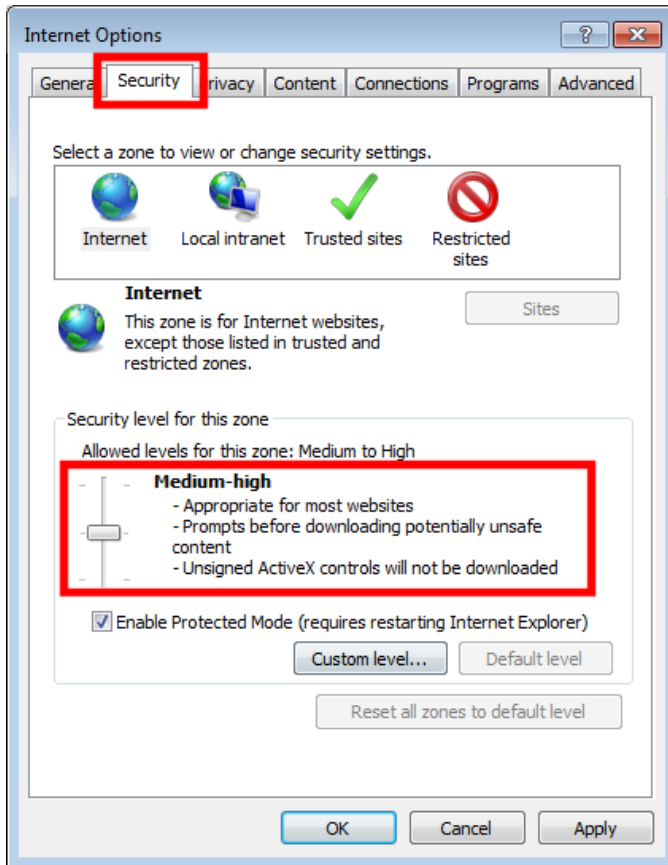
Under certain circumstances, the widget may be prevented from being displayed in the browser without any indication that it has been prevented from doing so. In this case, when the **Next** or **Done** button is clicked, an error will likely occur due to the fact that the 'I'm not a robot' widget has not been successfully completed.

A common reason for this is the browser’s security and/or privacy settings are set too high. If the device being used to access the PostalWeb site is controlled through an MSP that has an IT department, contact the IT department for assistance; otherwise, refer to the information provided here.

i *Users should defer to their own company’s policies regarding security and browser settings.*

Internet Explorer

To lower the security settings in the browser, follow the instructions pertaining to Internet Explorer provided under [ERROR DISPLAYS AFTER THE LOGIN BUTTON IS CLICKED](#). Window Book recommends a Security setting of ‘Medium-high’ (see image below).




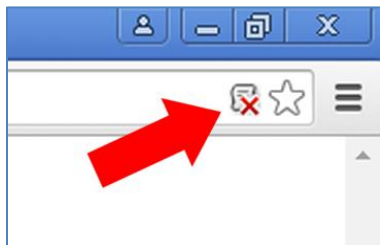
🔧 *Windows permissions for the credentials used to log on to the computer that the browser resides on may be set so that this control is ghosted and/or cannot be changed. In this case someone with the appropriate permissions must be contacted to change the setting.*


If the control cannot be changed, then attempt to add the website’s URL to the ‘Trusted sites’ list.

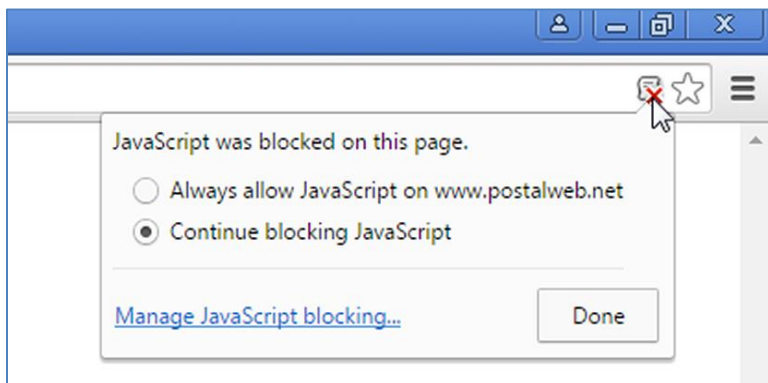
i *Users should defer to their own company’s policies regarding security and browser settings.*

Chrome

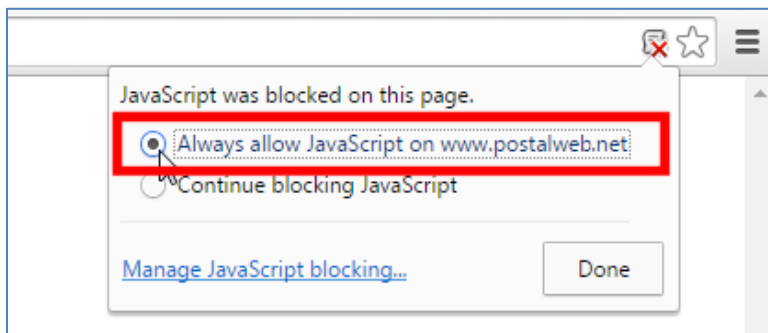
The 'I'm not a robot' widget may be prevented from displaying if JavaScript has been disabled. An indication of this condition is the display of the icon  located in the upper right corner of the browser window when a page is navigated to that would normally display the 'I'm not a robot' widget.




The blocking of JavaScript can be selectively turned off for the postalweb.net site (thus allowing the 'I'm not a robot' to be displayed) by placing the mouse cursor over the icon  and left-clicking the mouse. A box will open giving the user a choice of selectively enabling JavaScript only on www.postalweb.net pages.



To allow the 'I'm not a robot' widget to appear, the 'Always allow JavaScript on www.postalweb.net' selection must be selected (clicked).

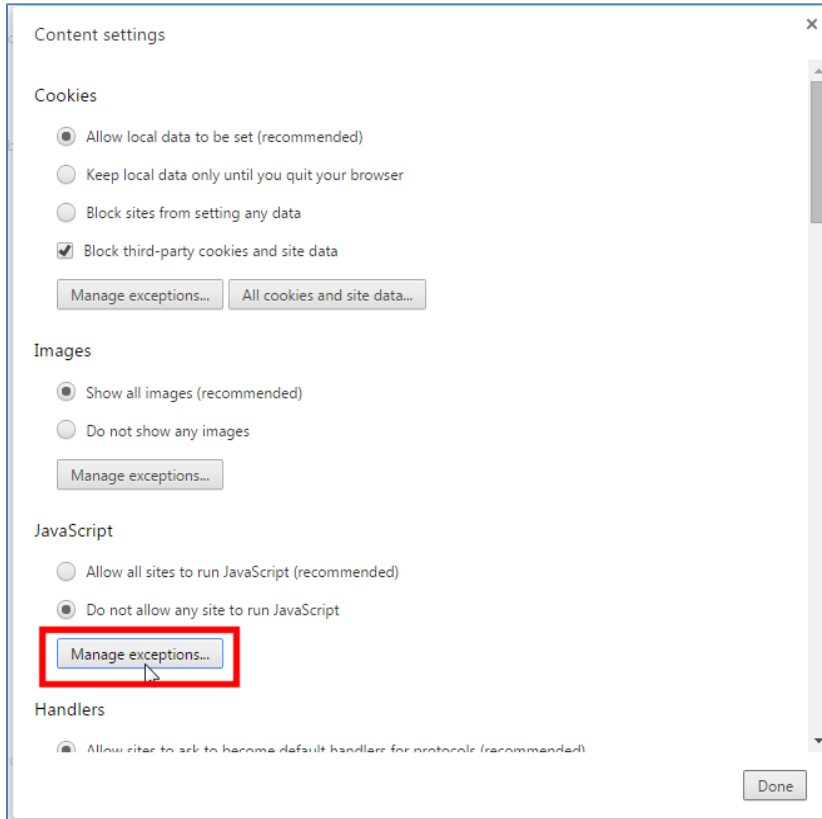


After the selection is made to allow JavaScript on www.postalweb.net, the currently displayed page must be reloaded via the reload button . The 'I'm not a robot' widget should now be displayed and can be completed.

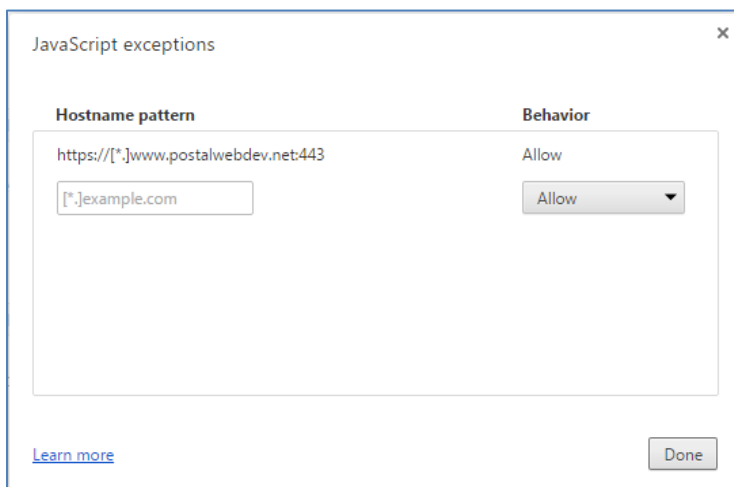
Appendix 2 – Troubleshooting

To inspect and manage the JavaScript setting for both general browsing and also for individual sites, refer to the instructions pertaining to Chrome documented under [FREEZING OR STALLING AFTER THE LOGIN BUTTON IS CLICKED](#).

If exceptions for specific, individual sites is desired, leave the option 'Do not allow any site to run JavaScript' selected and click the **Manage Exceptions...** button.



The *JavaScript exceptions* window will open displaying any exceptions already specified. Additional exceptions can also be added which will over-ride the general behaviors selected in the previous screen.



Enter the 'Hostname pattern' (i.e. web page URL) and select 'Allow' from the corresponding drop down list provided.

Click the **Done** button when configuration is complete.



Users should defer to their own company's policies regarding security and browser settings.

DATA STOPS DISPLAYING FOR PROVISIONED LOCATION



This section assumes a location has already been provisioned in MailDrop Engine and that data has already been made available for that location in an MSP's PostalWeb site.

If new data suddenly stops being displayed in PostalWeb for a location that's been provisioned in MailDrop Engine, check to make sure the location's status is 'Active' in PostalWeb.



Only users assigned a role of 'Company Admin' can check/modify any Location's status. User's assigned a role of 'Company Location Manager' can only check/modify the status of a Location that he or she already has access to.

User's assigned a role of 'Company Admin' should refer to the [Editing A Location](#) section in this Guide for instructions on how to check if a location is Active.

User's assigned a role of 'Company Location Manager' should refer to the [LOCATION INFO OPTION](#) section in this Guide for instructions on how to check if a location is Active.

If it is determined that a location's Active status is set to OFF, click the toggle button to turn it ON (i.e. activate it).

If the status will not change to, or remain set to 'Active' for the location, this suggests that access has been denied to *PostalOne!* for one of two reasons: 1) *PostalOne!* is experiencing issues with their site; or 2) The BCG or *PostalOne!* login credentials entered for uploading files and/or provisioning the location in MailDrop Engine are no longer valid.

There are 3 steps required to correct these issues: 1) Determine if the login credentials being used are valid; 2) Re-enter the login credentials (if necessary); and 3) Re-active the provisioned location in PostalWeb.

Step 1: Determine if the *PostalOne!* login credentials being used are valid

- Launch MailDrop Engine and click the **Edit** button of the configuration that is reporting that the login failed (i.e. PROD, PREPROD, CAT, or TEM).
- Near the bottom right corner of the configuration's details screen, click the **Verify PostalOne! Credentials** button.
- If the issue is with *PostalOne!*, the "login failed" message displayed will be replaced with an "authentication succeeded" message. Skip Step 2 below and proceed to Step 3.

Step 2: Enter valid *PostalOne!* login credentials (if necessary)

- If the issue is not with *PostalOne!*, the “login failed” message will continue to display. This most likely means that the login credentials being used are no longer valid and need to be updated. Click the **Edit PostalOne! Credentials** button located near the bottom left corner of the screen.
- A command window will display. Enter the requested information taking care to avoid making any type-o’s. Click the **Enter** button on the computer’s keyboard after each entry. After the last entry, the window will automatically close.
- If the “login failed” message will continue to display, contact Window Book Tech Support at 1-800-477-3602.
- If a connection is re-established with *PostalOne!*, the “login failed” message will be replaced with an “authentication succeeded” message.
- Next, click on the ‘PostalWeb’ icon button located on the left of the MailDrop Engine screen.
- Click the **EDIT** button and enter a set of valid *PostalOne!* login credentials.
- Click the **SAVE** button to save the changes and proceed to Step 3 below.

Step 3: Re-activate the provisioned location in PostalWeb (the instructions provided here require a user assigned a role of Company Admin)

- Log in to your PostalWeb site.
- Select (click) the ‘MSP’ top menu. Then, expand the MSP side menu and select (click) the ‘Manage Locations’ option.
- Click anywhere on the colored tile of the location that is provisioned in MailDrop Engine to open the location’s details screen.
- The ‘Activate’ field will be OFF. Re-activate the provisioned location by clicking the ON/OFF toggle button so the button reads “ON”.
- Click the **DONE** button on the screen to save your changes.