

# **Mail-Shop Interface User Guide**



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# SETUP

1. **Access** to the Mail-Shop interface is controlled by registration code. Make sure you have a registration code specifically for the Mail-Shop option entered into Post Master or DAT-MAIL™.
2. **ODBC Data source:** Using the **MS SQL version** of Mail-Shop, you already have an ODBC data source on every computer using Mail-Shop. You will need to create a data source on any computer that is going to use DAT-MAIL™ or Post Master, but is not set up for Mail-Shop. If all of your computers that are using your WBI program already run Mail-Shop, you do not need to create an ODBC data source. To create the ODBC Data Source, go to the ODBC Data Source Administration program of the computer. Go to the System or File DSN tab, press the Add button, name the datasource "Mail-Shop2kSQL". Next select the MS SQL driver, and enter the name or IP address of your server. On one tab of your Data Source Setup Screen, you will check a checkbox to change the default database and you will select Mail-Shop2kSQL as the default database. If you later want to run Mail-shop on this workstation, it can use this same data source. In the Datasource Security section, the login for the SQL version is Mail-ShopUser, without a password.
3. From either Post Master or the DAT-MAIL™ statement printing program, select Program Setup from File Menu.
4. Go to the lower left of the screen and select Mail-Shop as the External data option
5. Select the Mail-Shop2kSQL ODBC DSN you created in step 2 or was already created for the SQL version of Mail-shop running on the computer. Enter Mail-ShopUser as the login, with no password.
6. Press OK to save your settings. If you are using Mail-shop 6.0 for MS SQL, you can also import final postage usage from DAT-MAIL™ or Post Master but you need to follow the steps below to set that up. If you are using an earlier version or an Access version of Mail-Shop, you will not be able to do this import so you can just press OK again to exit the setup program.
7. Click on the "Export Tab" of the setup screen.
8. Under Jobshop Export, highlight the 'Mail-Shop, CSV' option and press change. Check off the Enable Mail-Shop CSV Export and enter a valid folder name which you will use to store the statement data sent to Mail-Shop. You should keep this in a dedicated folder but the path name can not exceed 20 characters including slashes and drive letters. Click OK to save.

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8. At the bottom of the Export tab, check the Export Only Verified Statements checkbox. Press OK to save your setups. You are ready to use the interface from Post Master or DAT-MAIL™ statements.

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# Using the Interface

1. When you create statements from either DAT-MAIL™'s Statement Generation screen in the Statement Generation View or manually in the Statement Printing Program (or Post Master), you will be able to access Mail-Shop's Job and Client list in real-time! When you select a job, the client for that job will automatically be selected. At this time, you may still need to make sure a valid permit is selected since we don't always have all the permit data we need in Mail-Shop to fill in all the info the USPS wants.

2. When you save a statement, any new job or client info is updated to WBI's job and client file. When you go to run reports, only clients or jobs for which statements exist in DAT-MAIL™ or Post Master will be listed. If the job or client you want to run the report for is not listed, it means there is no data from which to generate a report. This is way the 'synch' feature is really not needed.

3. You have the ability to import the postage usage from Post Master or DAT-MAIL™ Statement Program . You must first 'Validate' your final statements when you get the round stamped statements back from the USPS. If there were no changes just go to the statement list, find the statement (by control number is easiest) by typing the control number and checking off the blue checkbox on the toolbar for all but consolidated statements. If your statement is a consolidated statement there is a verify button you can check once you have highlighted the correct statements. If you have to make changes, make them first then verify.

4. To export the data go to the Post Master or DAT-MAIL™ Statement Printing Program File Menu and select the 'Export to Mail-Shop' option on the menu.

5. To import, you must go to the Mail-Shop Window Book Import program "WBIMPORT.MDB", press the Import Postage Data button on the screen and select the file that was just created. At the present time (8/22/04) there is no way to set a default folder for this lookup and by default you will see a list of files in your MyDocuments folder. Change to the Mail-Shop data transfer folder you setup and pick the last file on the list. The file name starts with Statement and includes the time and date created so the most recent file always appears at the end of the list. You will next get a screen showing you all the statement detail which will also show any validation errors found. The order number and client are both validated. The validated statements will have a checkmark at the beginning of the line item listing the statement. If all looks OK, press the POST button at the bottom of the screen to accept the data.





# FAQs

**Question:** Mailing Statement information - how is it set up and used with the Mail-Shop interface?

**Answer:**

Permit holder name and address

The Permit Holder name and address plus the PO of Mailing used in our Permit file has to be stored in our Permit File. MailShop only associates a permit number to a job and we have to fill in the rest. If you try to create a statement for a job where the PO of mailing info is missing, we will pop up a permit maintenance screen when you try to save the statement, so that you can fill all this data in before we save the record. You can look at our permit list (File; Permit form the Main Menu) and fill in the permit holder info. Although we do not link the permit holder to the client file directly, if the client is on file and the permit belongs to a client, you can select the client when editing the permit to bring in the client's name and address and set it as the permit holder.

Name and address of Agent

We are getting this information directly from MailShop.

Name of organization for which Mailing is prepared

This is coming from MailShop's client list, and is stored in our own client file when the statement is created.

Permit Number

This is coming from MailShop's job file. You do have the ability to override it.

