

ODBC Connect User Guide

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INTRODUCTION

ODBC Connect allows you to use external data in another application for creating postage statements. There are a number of advantages to using external data in WBI products:

1. Ensures that statement is for a job that exists in another system. This way any data that is brought in from the WBI statement files will be associated with valid job numbers.
 2. Reduces data entry. You no longer have to maintain separate Job, Client and other files inside Post Master™ or DAT-MAIL™ programs.
 3. ODBC enhances the ability of DAT-MAIL™ to automatically generate statements. If both external job and client tables are mapped, DAT-MAIL™ can associate the correct client with each statement automatically from the job number.
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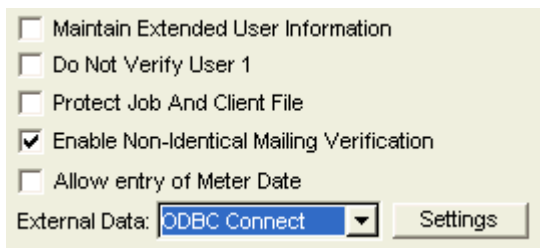
SETTING UP ODBC CONNECT:

1. Create an ODBC Data source in Windows for your data files. We recommend defining the data sources as a File or System data source. The exact method for defining the data source differs with each version of Windows and 'view' option selected but for XP, you would go to Control Panel, Administrative Tools and select ODBC data source. Depending on the database type you are creating a data source for, you can point to an SQL database or a folder where files are kept. If an SQL data base is selected, you will be able to access both tables and views defined in that database and will be able to modify the SQL syntax used to retrieve data so that the differences between different SQL databases can be dealt with.

2. Make sure ODBC Connect is registered. Go to Help, About, More About and registered options to be sure ODBC Connect is listed. If not, contact your WBI salesperson for a revised registration number if you don't already have one.



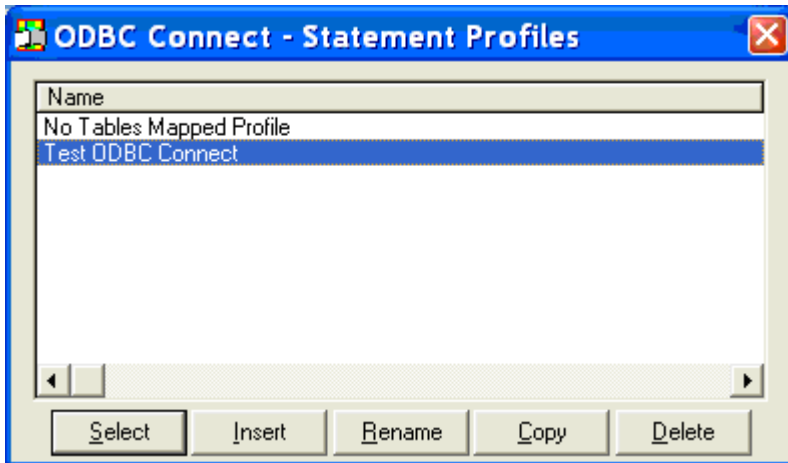
3. Enable and Configure ODBC Connect: If you are using DAT-MAIL™, press the 3602 button to go to the statement printing program then select the File Menu and Program Setup. If using Post Master, go to the File Menu and Program Setup.



At the lower left of the main setup screen you will see 'External Data'. Select ODBC Connect. Click on the Settings button. You will be able to select a profile, either for your workstation or for your whole network.

ODBC Connect can support the use of a number of external files but only the use of Job table is really required when working with the ODBC connect feature.

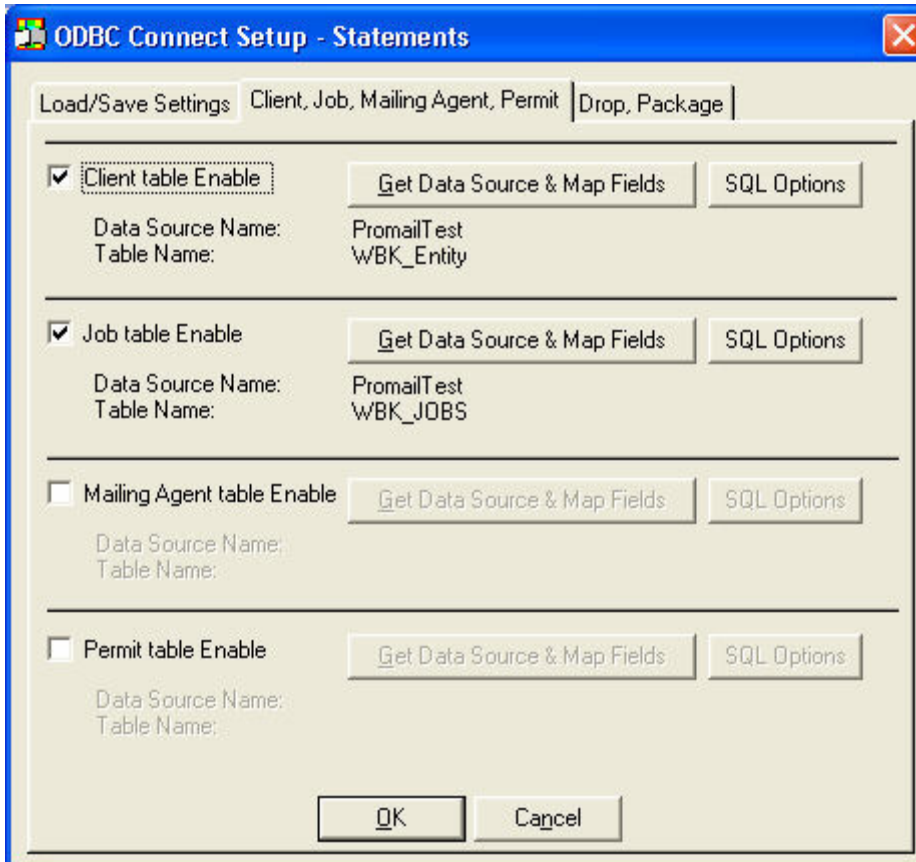
4. Profile: An ODBC Connect Profile contains the data connection and ODBC Mapping details for each of the data tables being mapped. On first use, you will need to create and name and then select a profile for your computer. You can create multiple profiles, but only one profile can be in use per computer. If you have multiple computers that will have identical Connection and ODBC Mappings, they can select the same profile, simplifying the setup and maintenance of the ODBC settings. An ODBC Connect Profile allows mapping tables from different data sources. For example, Client data could come from an MSSQL table while the Job data could come from an MS Access table.



Once an ODBC Connect Profile has been selected for a computer, that profile will automatically be associated when the computer starts the application. Note: the ODBC Connect Profile name is stored along with the workstation's computer name so if the computer name changes the ODBC Connect Profile will not be automatically associated with the computer the next time the application starts and the Profile will have to be reselected.

Once a profile has been named, individual tables will need to be mapped.

5. Field and File Mapping. Mapping is simply the process of associating the fields from the external ODBC data to the corresponding Statement data fields. To map data, enable the table



Client – provides client data for printing on statements.

Job – can be used to get job or order information from another system. A client code in a job file can be linked to the client file to automate retrieval of client information.

Job and Client tables are the most useful, particularly when linked.

Mailing Agent – you can link this to a table of company division or locations.

Permit – allows the use of external permit data

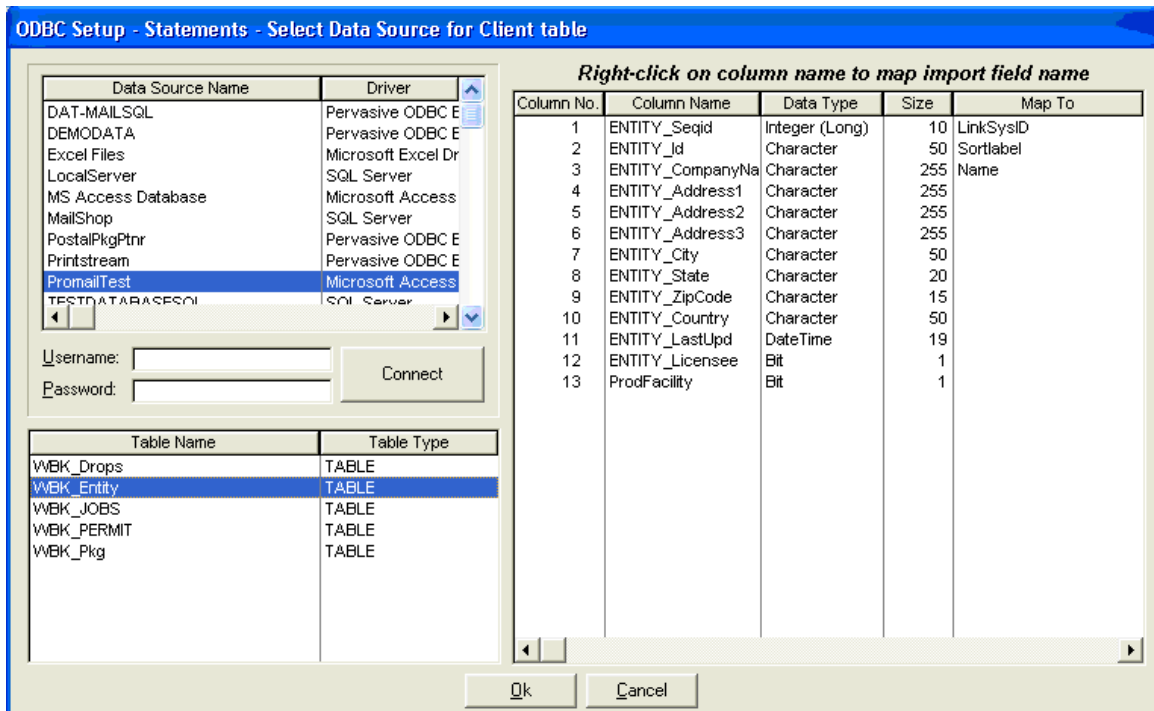
Drop – a list of drops or entry points that have been predefined for a particular job – must be linked to job.

Packages – a list of physical pieces being produced for a specific job including piece weight – must be linked to a job.

Packages – a list of physical pieces being produced for a specific job including piece weight – must be linked to a job.

MAPPING A TABLE

1. Check off the table you are mapping, press the GET DATA SOURCE and MAP File Button:
2. Select the data source for this table. Each table can have a different data source or share the same data source as another table
3. If your databases require a login and password to access, enter that information then press the Connect Button to display a list of tables in the lower left of the screen. If you do not need to enter a login and password just press the Connect button.
4. Select the table you want to map from the lower left list.

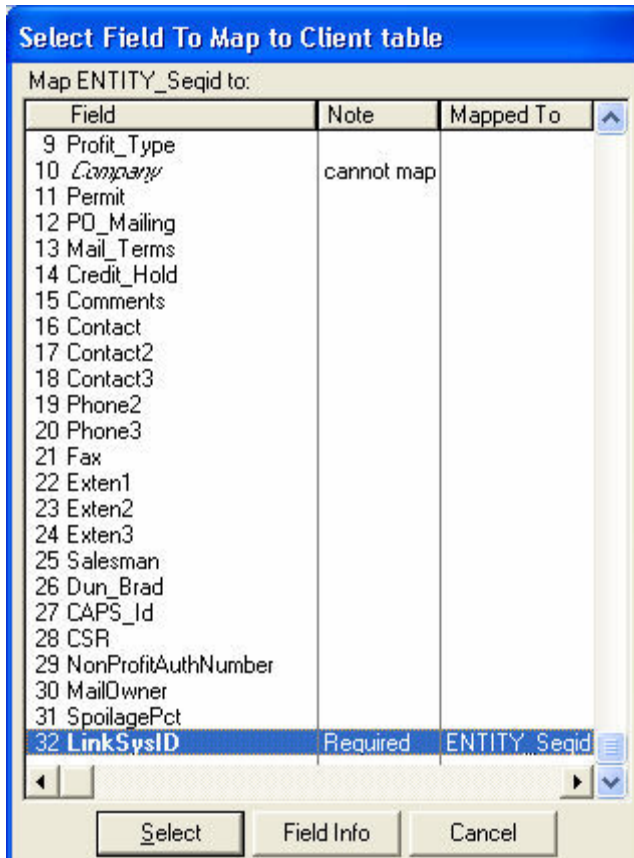


5. Map the fields by highlighting one of the fields you want to bring into DAT-MAIL™ or Post Master and right clicking on the mouse. You will get a list of WBI fields with notes such as whether the field is required by WBI products or not. If you are mapping the Client or Job file, you should probably start off by defining the Client Code or Job Number.

LINKING CLIENT AND JOB TABLES

The Job and Client tables can have separate Client and Job Numbers plus "SYSID's" which are unique 'serial numbers' the database uses to link records. Some data bases may not have SYSID's and link Client and Job tables by a Client Code. If you map a Client SYSID, we will assume that will be the link field to the Job table. If you do not map it, we will assume that the 'Sortlabel' (client code) is the link field.

On the client table you should map the sortlabel (client or account code), client name, address, city, state, ZIP and Phone. If there is a SYSID that will link it to the Job table, make sure to map that as well.



JOB TABLE - Map Job Number and Description. If you are going to link the Client table, also map the client code (which will link to sortlabel) or client SYSID (which will link to Client SYSID)

MAILING AGENT TABLE - Map Comp_Code to your code for that mailing agent or location and Comp_Name to the description of the same.

PERMIT - this is a list of permits that could be accessed across all jobs. The required information is:

Permit Number (PERMIT)
Permit Holder Name (NAME)
Post Office of Mailing City
Post Office of Mailing State
Post Office of Mailing ZIP

DROP – This table would have a record for each drop in a job

Drop ID (Drop Number) and JOB_ID are the only two required fields. Currently there is no way to link to a job based on a Job Table's SYSID.

If you want Post Master or DAT-MAIL™ to pick a drop ship entry point based on info in the drop file you must have the following information available and mapped:

FacilityType – B-BMC/ASF, S-SCF, A-ADC, D-DDU

FacilityZIP- USPS labeling list ZIP for the facility

SQL OPTIONS

The way data is accessed from Oracle is a lot different than it is accessed from Sybase, for example. With these options you can change the way DAT-MAIL™ or Post Master builds queries by choosing options on this screen. The checkbox "Browses show SQL Controls" if checked.

Enable Like Processing – when you do an SQL statement where Job=<string> we say Job like <string%> which allows for a close match where only the first characters of the job number match. If not checked an exact match is required.

Enable UCASE processing – forces text comparisons to upper case in the query.

Enable 'Select Top' processing to limit rows – if enabled it limits the number of rows returned from a query to boost performance if there are a lot of rows returned from the query. Note that different types of databases use different syntax to limit the number of rows returned. For this reason the 'Select Top Method' is available to customize this.

Enable “Use ‘Select Distinct’” to remove duplicate rows. If the data query is returning many identical rows, checking this may help.

Include Table Name in Column Name – required by some ODBC drivers, particular ASCII drivers and some for some non-SQL databases.

Generate Queries in upper case – all statement syntax is upper case. This is also required by a few ODBC drivers (including some versions of Oracle).

Check “Add Quotation marks around Column and Table names” when the table name or field names may not be comply completely with ANSI SQL standard (example, if it contains spaces in the field name or table name).

If you check “Browses Show SQL Controls”, then the ODBC Connect window showing the external data will have a “Show SQL” button on the bottom left. Clicking that button will display the SQL command sent to the database to retrieve the data (and change the button text to “Hide SQL”). The column headers will also have the actual field name appended in parenthesis. The SQL command can be modified to customize the data being returned. After completing the command, press the Tab key and the data list will be updated.

The screenshot shows a window titled "Jobs Listing - ODBC Connect (PMW456/job)". It contains a table with the following data:

Job (JOB)	Client (CLIENT)	Client Name	Company (COMPANY)	Est Postage (EST_PST)
001 R-EG	WBI	Window Book Inc	WINDOW	0.0000
011606	WBI	Window Book Inc	WINDOW	0.0000
05054068	WBI	Window Book Inc	WINDOW	0.0000
051830	WBI	Window Book Inc	WINDOW	0.0000
060105se	WBI	Window Book Inc	WINDOW	0.0000
10989	WBI	Window Book Inc	WINDOW	0.0000
121422	WBI	Window Book Inc	WINDOW	0.0000
202392	WBI	Window Book Inc	WINDOW	0.0000
207770	WBI	Window Book Inc	WINDOW	0.0000
24253	WBI	Window Book Inc	WINDOW	0.0000
30663 166	WBI	Window Book Inc	WINDOW	0.0000
31103 44BN NEW	WBI	Window Book Inc	WINDOW	0.0000
35049	WBI	Window Book Inc	WINDOW	0.0000
35049-1	WBI	Window Book Inc	WINDOW	0.0000
39660	WBI	Window Book Inc	WINDOW	0.0000
46036-001	WBI	Window Book Inc	WINDOW	0.0000
46848-001	WBI	Window Book Inc	WINDOW	0.0000
50531	WBI	Window Book Inc	WINDOW	0.0000

Below the table is a text area containing the SQL query:

```
SELECT CLIENT, JOB, COMPANY, EST_PST FROM job
WHERE Company='WINDOW' AND CLIENT='WBI'
```

At the bottom left is a button labeled "Hide SQL" and at the bottom right is a button labeled "Select".

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In the above example the SQL Where clause was added to limit jobs to a particular Mailing Agent and Client.

When the “Send SQL Statements to Debugger” is checked, the SQL statements are sent to the default Windows debugger (if one is running)

FIELDS FOR MAPPING

The following fields, grouped by table, are listed here with their field declaration and some comments regarding their use.

JOB		
CLIENT	STRING(20)	
JOB	STRING(50)	REQUIRED
COMPANY	STRING(50)	Mailing Agent – defaults to setup default if not mapped or valid.
EST_PST	REAL	(estimated postage for job)
TTL_PCS	LONG	(estimated pieces in job)
HOLD	BYTE	(Credit Hold Y/N)
OPEN_DATE	LONG	Date Opened
COMPETE_DATE	LONG	Date Completed
DESCRIPTION	STRING(30)	
BILL_TO	STRING(20)	Bill to client code
PERMIT	STRING(10)	
PO_MAILING	STRING(30)	(city state ZIP with one space in-between – may have to allow mapping of individual city, state and ZIP fields)
CSR	STRING(6)	
SALESMAN	STRING(6)	
SPOILAGEPCT	DECIMAL(7,3)	
CLIENTNAME	STRING(30)	Not mappable, calculated column
Bill_ToName	STRING(30)	Not mappable, calculated column
LinkSysIDClient	LONG	only required when Client LinkSysID is mapped
LinkSysIDBill_To	LONG	only required when Client LinkSysID is mapped
SubJobID	STRING(10)	optional

CLIENT		
SortLabel	STRING(20)	Client Code - Required
NAME	STRING(30)	Client Name - Required
ADDRESS	STRING(30)	
CITY	STRING(50)	
STATE	STRING(20)	
ZIPCODE	STRING(10)	
TELEPHONE	STRING(14)	
ACCOUNT	STRING(8)	
PROFIT_TYPE	BYTE	
COMPANY	STRING(50)	- Default Mailing Agent – defaults to Program Setup Default is not mapped.
PERMIT	STRING(10)	
PO_MAILING	STRING(30)	
MAIL_TERMS	STRING(6)	
CREDIT_HOLD	BYTE	0,n,N=0 1,y,Y = Yes
COMMENTS	STRING(30)	
CONTACT	STRING(20)	
CONTACT2	STRING(25)	
CONTACT3	STRING(25)	
PHONE2	STRING(14)	
PHONE3	STRING(14)	
FAX	STRING(14)	
EXTEN1	STRING(5)	
EXTEN2	STRING(5)	
EXTEN3	STRING(5)	
SALESMAN	STRING(6)	
DUN_BRAD	STRING(12)	
CAPS_ID	STRING(30)	
CSR	STRING(6)	
NONPROFITAUTHNUMBER	STRING(12)	
MAILOWNER	STRING(6)	
SPOILAGEPCT	DECIMAL(7,3)	
LinkSysID	LONG	only required when PModBCJobGrpType.LinkClientSysID is mapped
ADDRESS_2	STRING(50)	

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COMPANY/Mailing Agent		
COMP_CODE	STRING(50)	Mailing Agent ID - Required
COMP_NAME	STRING(30)	Mailing Agent Name
ADDRESS_1	STRING(30)	
CITY	STRING(50)	
STATE	STRING(20)	
ZIP	STRING(11)	
PHONE	STRING(14)	
DUN_BRAD	STRING(12)	
EMAIL	STRING(120)	
MAILERSCONTACTNAME	STRING(30)	8125 fields
MAILERSCONTACTPHONE	STRING(16)	
USPSCONTACTNAME	STRING(30)	
USPSCONTACTPHONE	STRING(16)	
USPSCONTACTNAME2	STRING(30)	
USPSCONTACTPHONE2	STRING(16)	
MAILERID8125	STRING(12)	
CARRIERMAKESDSAPTS	BYTE	
P1_IANUMBER	STRING(4)	PostalOne! IDEAlliance user number
VERIFIEDAT	BYTE	
COMMENT1	STRING(30)	
COMMENT2	STRING(30)	
FILLSECTION2	BYTE	
PERMIT	STRING(10)	
POofMAILING	STRING(30)	Post Office of Mailing

PERMIT		
PERMIT	STRING(10)	Required
POST_TYPE	STRING(1)	- do not map- default to 'P'
PO_MAILING	STRING(30)	- do not map. Derive from POCITY, POSTATE & POZIP
NAME	STRING(35)	Permit Holder Name (required)
ADDRESS	STRING(35)	Permit Holder Address 1
ADDRESS2	STRING(35)	Permit Holder Address 2
CITY	STRING(50)	Permit Holder City
STATE	STRING(20)	Permit Holder State
ZIPCODE	STRING(10)	Permit Holder ZIP
TELEPHONE	STRING(14)	Permit Holder Phone
PROFIT_TYPE	BYTE	0,n,N,Nonprofit,Non-profit=0 1,y,Y,p,P,Profit,profit=1
EXPIRE_DATE	LONG	
DUN_BRAD	STRING(12)	
HOUSEPERMIT	BYTE	0,n,N=0 1,y,Y =1
DONOTTRACKPOSTAGE	BYTE	Do Not track Postage Y/N -0,n,N=0 else 1 if mapped
POCITY	STRING(30)	Required
POSTATE	STRING(2)	Required
POZIP	STRING(10)	Required
CAPS_ID	STRING(30)	CAPS ACCOUNT

Fields for Mapping

DROP		
JobID	STRING(50)	Required to be mapped
DropID	STRING(9)	used to populate lot number in statement file. Required to be mapped
DESCRIPTION	STRING(255)	usually would be displayed to show description of drop
FacilityType	STRING(1)	the following two fields are used to set an entry point in the statement
FacilityZIP	STRING(9)	
DrpMailDate	LONG	
DrpEstCount	LONG	
DestID	STRING(50)	
SubJobID	STRING(10)	
PACKAGE		
JOB	STRING(50)	used to retrieve package records for job Required
PACKAGEID	STRING(12)	used to populate package number on statement screen Required
DESCRIPTION	STRING(50)	description of version
Piece_Wt	REAL	will populate piece weight in Required
Proc_Category	STRING(4)	L,LT, LTR,ACL selects ACL F,FL, FLAT, Flats selects ACF, C, PC, Postcard – selects Card (1st class), MP –machinable parcel, IR – irregular parcel, OP- outside parcel.
EstCount	LONG	
ApproxWeight	REAL	
WtInOunces	BYTE	1/0

USING ODBC CONNECT

When you create statements, instead of looking at DAT-MAIL™ or Post Master's master files, you are looking at whatever external tables you have enabled and mapped. When you press the Job lookup button on the statement entry or statement generate (DAT-MAIL™) screen, the list of Jobs is from the external data. If your Job and Client tables are linked and you select a Job, you get the Client in your files.

When a statement is saved, the data from the external tables is updated to DAT-MAIL™ or Post Master's own files. The lookups in other parts of the program other than statement generation or entry are looking at DAT-MAIL™ or Post Master's files but if you have created a statement for a new job, that job will still be listed. The one place where at the present time this could cause trouble is in the Postage Accounting program or Permit Balance Tracking program because accounting transactions can take place before statements are created.

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