

PRO-MAIL Interface User Guide

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PRO-MAIL® 5.0+ Interface to Post Master™

Easy Steps To Success

1. Obtain a Pro-Mail registration code for Post Master™.
2. Apply Post Master™ program setup information.
3. Create postage statements.
4. Export postage statement data to Pro-Mail.

SETUP

1. Do a normal POST MASTER™ single user or network installation. You will need to create a logical drive mapping for the drive on your network that can be accessed by both your POST MASTER™ and Pro-Mail 5 program.
2. On each workstation that will be using POST MASTER™, you must setup an ODBC System DSN data source pointing to the database that will be used by Pro-Mail 5. The procedure for doing this will vary with each version of Windows but you will need to know which server the database is on, the name of the database and the login and password to access the database before you start your configuration. The folder that we need to point to is the one that holds Pro-Mail's Warehouse database.
3. **Select the "Program Setup" option on Post Master™'s File Menu..** In order to enable the Pro-Mail 5 mode, you must obtain a registration key from Window Book that supports this feature. Versions of POST MASTER™ earlier than 5.02.01.01 did not require a special key.

At the Defaults Tab, select Pro-Mail from the drop-down box in the lower left hand corner of the screen.

PRO-MAIL Interface User Guide

The screenshot shows the 'General Info' tab of the PRO-MAIL interface. The 'Settings' button is highlighted, and the 'External Data' dropdown is set to 'Pro-Mail'. The interface includes various checkboxes for user preferences and settings, such as 'Use Quick Date Entry', 'Print Employee Name', and 'Create Postage for 3606 Receipt'. There are also sections for 'Default Invoice Type' (radio buttons for 'Estimated Postage' and 'Settlement') and 'Bill of Lading' (dropdown for 'Mailing Agent' and 'Default Copies').

4. Press the **Settings** button. Select the data source you set up for Pro-Mail 5 and enter the user name and password that is required to access this database.

5. Next, click on the Export Tab:

The screenshot shows the 'Export' tab of the PRO-MAIL interface. The 'Export' tab is highlighted, and the 'Jobshop Export' table is visible. The 'Pro-Mail 5, XML' option is highlighted, and the 'Change' button is visible. The 'MailOwner Export' section includes checkboxes for 'Enable MailOwner Statement Export' and 'Export Only Verified Statements', and a text field for 'Export Folder'.

Status	Export Type	Folder
Disabled	Pro-Mail 4, CSV	
ENABLED	Pro-Mail 5, XML	C:\Temp\promail\

6. Highlight the Pro-Mail 5, XML option and press the Change option.



7. **Do** check Enable Pro-Mail 5, XML Export (note, you can have both Pro-Mail 4 and 5 interfaces enabled and data will be sent to both systems which may be useful during a transition period).

8. Select the folder on the network using the lookup button on the right of the **Export Folder** field where you will be sending your Pro-Mail data. This is usually something like H:\Gomi depending on how you mapped the network drive that can be accessed by Pro-Mail.

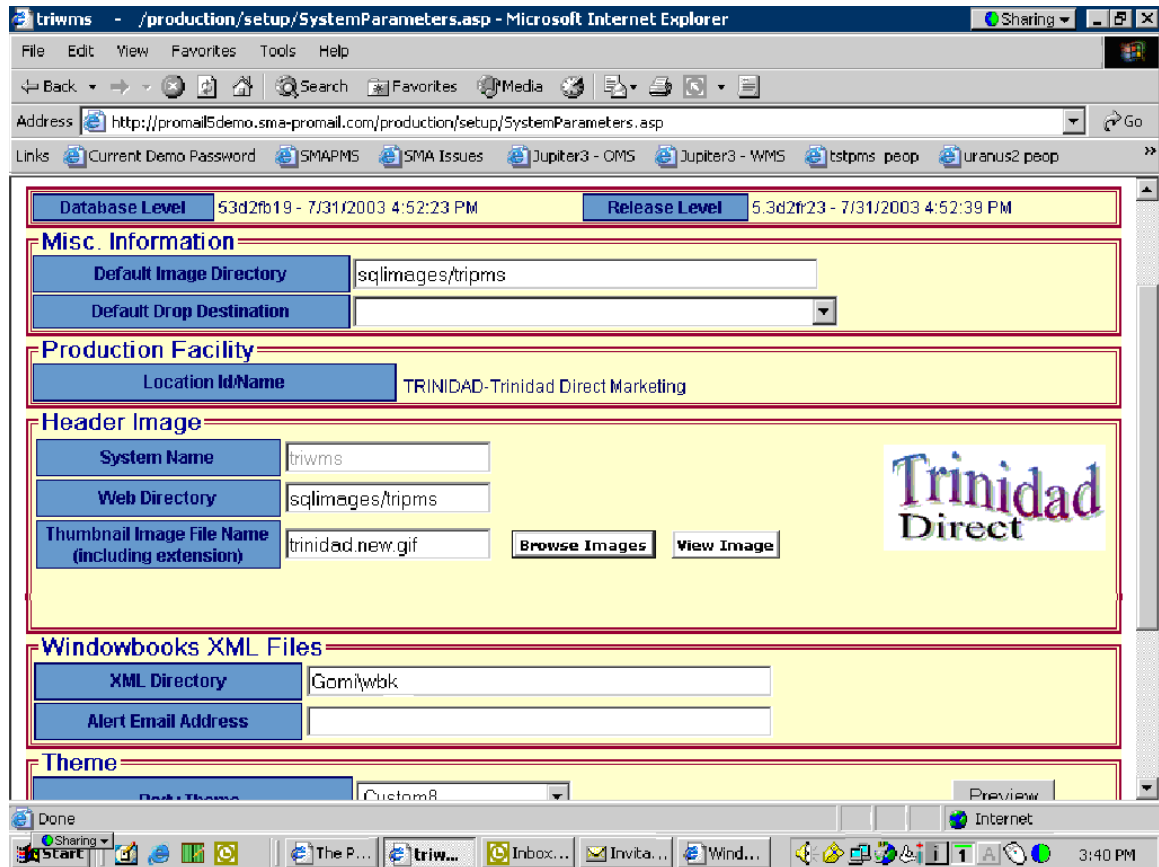
9. **Do Not** check off the XML Test checkbox. This will include container level detail in your XML files which is not used by Pro-Mail at this time.

10. Press the **OK** button on the Job Shop Export Settings dialog.

11. **Do** check off 'Export Only Verified Statements' on the Export tab of Program Setup. Press the OK button at the bottom of the screen to save your set-ups.

12. Repeat steps 3 and 4 to select your ODBC datasource and enter login info for **ALL** workstations using Post Master™. **You will not have to repeat the other setup changes.**

AT THE PRO-MAIL 5 END



In the Production Control System, go to Setup, System Parameters then set XML directory to Gomi (or a subfolder of Gomi if you wish).

PROJECT MANAGEMENT

1. Make sure the Postage Liability and Postage Inventory Accounts have been assigned account numbers in the Setup Screen
 2. Import Entry Point information. You can export a list of USPS entry points from the file menu of your Post Master™ Statement Printing Program then import it in Pro-Mail's Project Management System. To import the Window Book file of destinations, log into the Production Control . Go into Utilities > Import Drop Destinations. The file should reside in Gomi. Enter the file name to import or browse the directory to select the file.
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USING POST MASTER™ WITH PRO-MAIL 5

When creating statements with Post Master™, you may either use the drop data you have setup in Pro-Mail 5 in advance or create the drops on the fly by entering a drop number into Post Master™'s 'Lot' field that has not already been used to define a drop for the job you are creating statements for. Post Master™'s "LOT" field is used for the Pro-Mail Drop Number and the "Package" field is used for the package number. Lookups are provided for each. The Drop lookup will display automatically after you select a job so you can select a valid drop for that job. When you get to the package field, press that lookup button and select a valid drop for that job. The single piece weight will be populated on the statement automatically though you can override it. Both Lot and Package fields are required.

Important Note: You do NOT have to select a Pro-Mail 5 Drop when creating statements manually. If the drop number you wish to assign is not already in Pro-Mail, you may enter your own, though you should take care to make it unique for the job. When the statement is imported into Pro-Mail 5, the drop will be added automatically.

Unlike the Drop Number, you **MUST** use a valid Pro-Mail 5 Package ID when creating statements otherwise the statement data will fail to be imported.

Unlike Pro-Mail 4, Pro-Mail 5 and POST MASTER™ support multiple packages per drop so you can create statements with either 1 package per drop or multiple packages per drop. Here is how..

Creating Single Package per Drop Statements

- a. When creating a "Normal" (single package) statement, enter the job number and press TAB. You can also lookup the job directly from Pro-Mail's table by pressing the lookup button to the right of the Job field.
- b. Select the Drop. After you select or entry the job, you will see a list of drops appear. Select one. The program will update the 'Lot' field with the drop number and select the appropriate entry point for you automatically.
- c. Press the lookup button next to the Package Field and select a Pro-Mail package. The weight of the package will be updated to Post Master™'s Weight field. The weight will be in ounces or lbs depending on what was originally setup in Pro-Mail 5.
- d. Select the Permit by pressing the lookup button. This permit info is coming right from Pro-Mail's tables
- e. Create and print the rest of the statement as usual.

Creating Multi-Package per Drop Statements (First Class and Standard Mail Only)

- a. When creating a new statement, indicate “multi-package” as the statement type in the first entry field
- b. Select a job then a drop as described for single package statements.
- c. Enter the rest of the statement info per usual and enter something in the weight field, even if it is not correct.
- d. Go to the calculation tab and double click on any rate. You will see button and you will see the “Multi Job/Client listing. Press the Insert key go to the Package field. Press the lookup button and select a package.
- e. Click on the Calculation tab and enter your piece counts for this package. When done press the OK button at the top of the screen then press the Insert button again to add a new package then select which package that is and enter our counts.
- f. Repeat until all packages for this drop have been entered. Remember, this feature only allows you to create drops with multiple packages. If you want to create statements with multiple drops, you should be creating Consolidated statements.

Transferring Postage Data to Pro-Mail 5

- a. Go to the Statement Menu and use the icon with the blue checkmark on the toolbar to check off all statements that have been round stamped and whose postage matches the amount in the database. You can view the total postage without editing the statement by pressing ‘details’ or scrolling to the right. Checking off the statement indicates the postage is final and you will not easily be able to delete or change this statement.
- b. Go to the File Menu and select the option to Export Jobshop Statements. Within a minute or so all your postage data will automatically show up in Pro-Mail.

Transferring BMC, SCF and ADC data to Pro-Mail 5.

- a. Go to Postmaster’s File Menu
 - b. Select ‘Export Entry Points’. The labeling list data in Post Master™ will be transferred to Pro-Mail 5.0. Note- at this time ADC’s used by Periodical Mailers are listed with BMC’s. When setting up a BMC drop for Standard Mail or Parcel Services, be sure to select the BMC not ADC entry.
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Using the PRO-MAIL® 5.0+ Interface

Easy Steps To Success

1. Obtain a PRO-MAIL registration code for DAT-MAIL™.
2. Apply DAT-MAIL™ program setup information.
3. Create Window Book XML file directory in PRO-MAIL.
4. Define drop information then export to PRO-MAIL for Work Tickets.
5. Create postage statements.
6. Export postage statement data to PRO-MAIL.

SETUP

1. Do a normal DAT-MAIL™ single user or network installation. You will need to create a logical drive mapping for the drive on your network that can be accessed by both your DAT-MAIL™ and PRO-MAIL 5 program.

2. On each workstation that will be using DAT-MAIL™, you must setup an ODBC System DSN data source pointing to the database that will be used by PRO-MAIL 5. The procedure for doing this will vary with each version of Windows. You will need to know which server the database is on, the name of the database, and the login and password to access the database before you start your configuration. The folder that we need to point to is the one that holds PRO-MAIL's Warehouse database.

3. **Press the '3602' Button on the DAT-MAIL™ Toolbar to open DAT-MAIL™'s Statement Program then Go to the File Menu and select Program Setup .** In order to enable the PRO-MAIL 5 mode, you must obtain a registration key from Window Book that supports this feature. Versions of DAT-MAIL™ earlier than 5.02.01.01 did not require a special key.

On the DAT-MAIL™ Statements side of the program, select FILE => Program Setup.

At the Defaults Tab, select PRO-MAIL from the drop-down box in the lower left hand corner of the screen.

PRO-MAIL Interface User Guide

The screenshot shows the 'General Info' tab of the PRO-MAIL interface. The 'Settings' button is highlighted, and the 'External Data' dropdown is set to 'Pro-Mail'. The interface includes various checkboxes for user preferences and a 'Settings' button.

General Info | Statement Defaults | Periodicals | Drop Ship | 8125 | Export | User Defaults | Confirm ASN / EI

Use Quick Date Entry
 Auto Number Client Records
 Do Not Preview Any Reports
 Print Employee Name
 Print Employee Initials
 Lookup Clients by Client Code
 Limit Piece Counts to Master Statement Quantities
 Create Postage for 3606 Receipt

Default Invoice Type
 Estimated Postage Settlement

Print Client Code on Statement
 Clear Check Request after Report
 Maintain Extended User Information
 Do Not Verify User 1
 Protect Job And Client File
 Enable Non-Identical Mailing Verification
 Allow entry of Meter Date

Bill of Lading
Mailing Agent: WWINDOW
Default Copies: 1
 Prepaid

External Data: Pro-Mail Settings

OK

4. Press the Settings button. Select the data source you set up for PRO-MAIL 5 and enter the user name and password that is required to access this database.

5. Next, click on the Export Tab:

The screenshot shows the 'Export' tab of the PRO-MAIL interface. The 'Export' tab is highlighted, and the 'Jobshop Export' table is visible. The 'ENABLED Pro-Mail 5, XML' option is highlighted, and the 'Change' button is visible.

General Info | Statement Defaults | Periodicals | Drop Ship | 8125 | Export | User Defaults | Confirm ASN / EI

Export

Jobshop Export:

Status	Export Type	Folder
Disabled	Pro-Mail 4, CSV	
ENABLED	Pro-Mail 5, XML	C:\Temp\promail\

Change

MailOwner Export:

Enable MailOwner Statement Export
 Use "USERS" for Mail Owner's Job Number

Export Folder: C:\TEMP\ ...

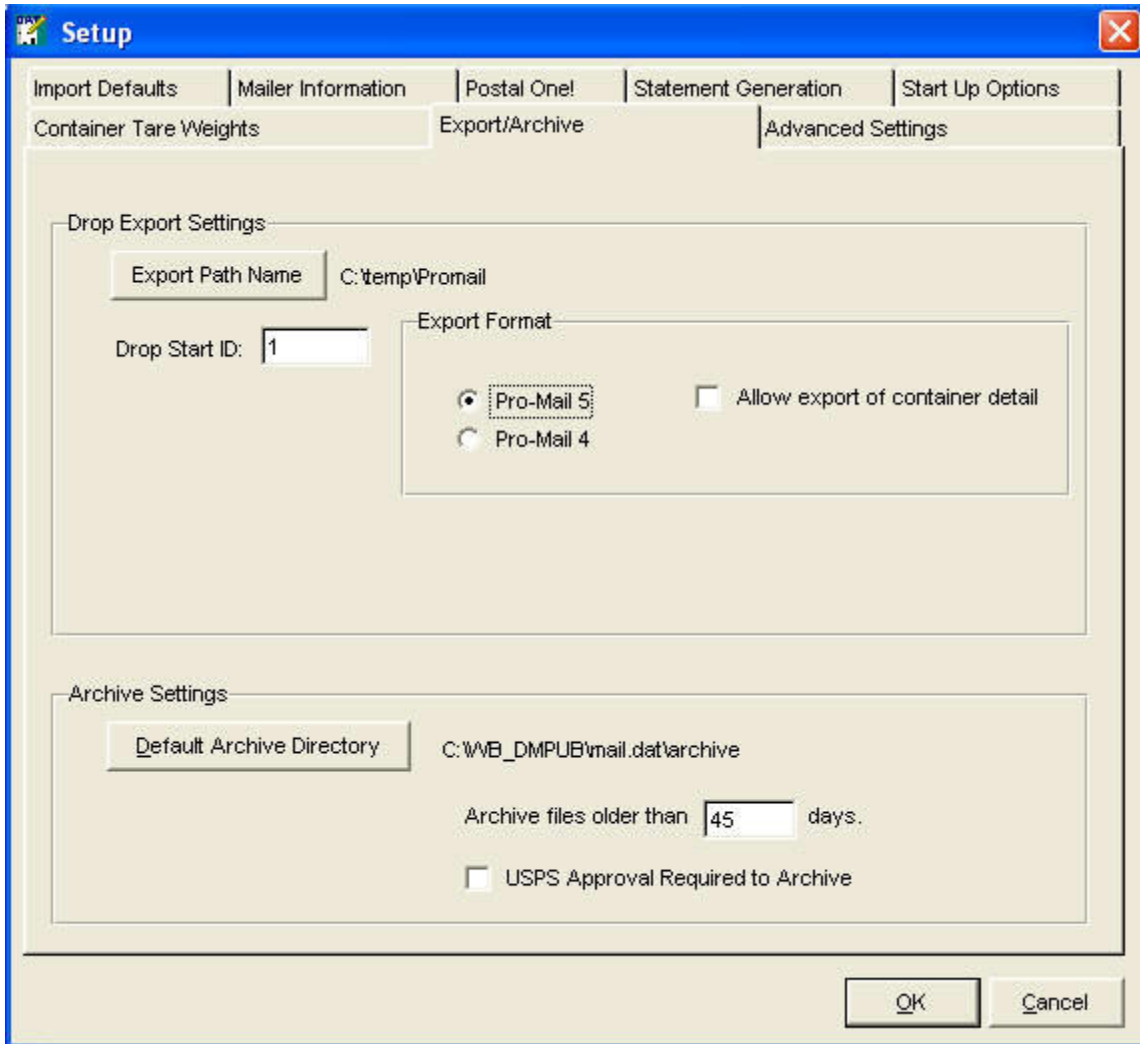
Export Only Verified Statements

6. Highlight the PRO-MAIL 5, XML option and press the Change option.



7. Do check Enable PRO-MAIL 5, XML Export (note, you can have both PRO-MAIL 4 and 5 interfaces enabled and data will be sent to both systems which may be useful during a transition period).
8. Select the folder on the network using the lookup button on the right of the Export Folder field where you will be sending your statements data to PRO-MAIL. This is usually something like H:\Gomi depending on how you mapped the network drive that can be accessed by PRO-MAIL.
9. Do Not check off the XML Test checkbox. as this will include container level detail in you XML files, which is not used by PRO-MAIL at this time.
10. Press the OK button on the Job Shop Export Settings dialog.
11. Do check 'Export Only Verified Statements' on the Export tab. Press the OK button at the bottom of the screen to save your set-ups. If you cannot see the OK button, try repositioning your window or use your Ctrl+O keys.
12. Repeat steps 3 and 4 to select your ODBC data source and enter login info for ALL workstations using DAT-MAIL™. You will not have to repeat the other setup changes.

Go back to the main DAT-MAIL™ Program. Click on FILE => Program Setup => Export/Archive tab.



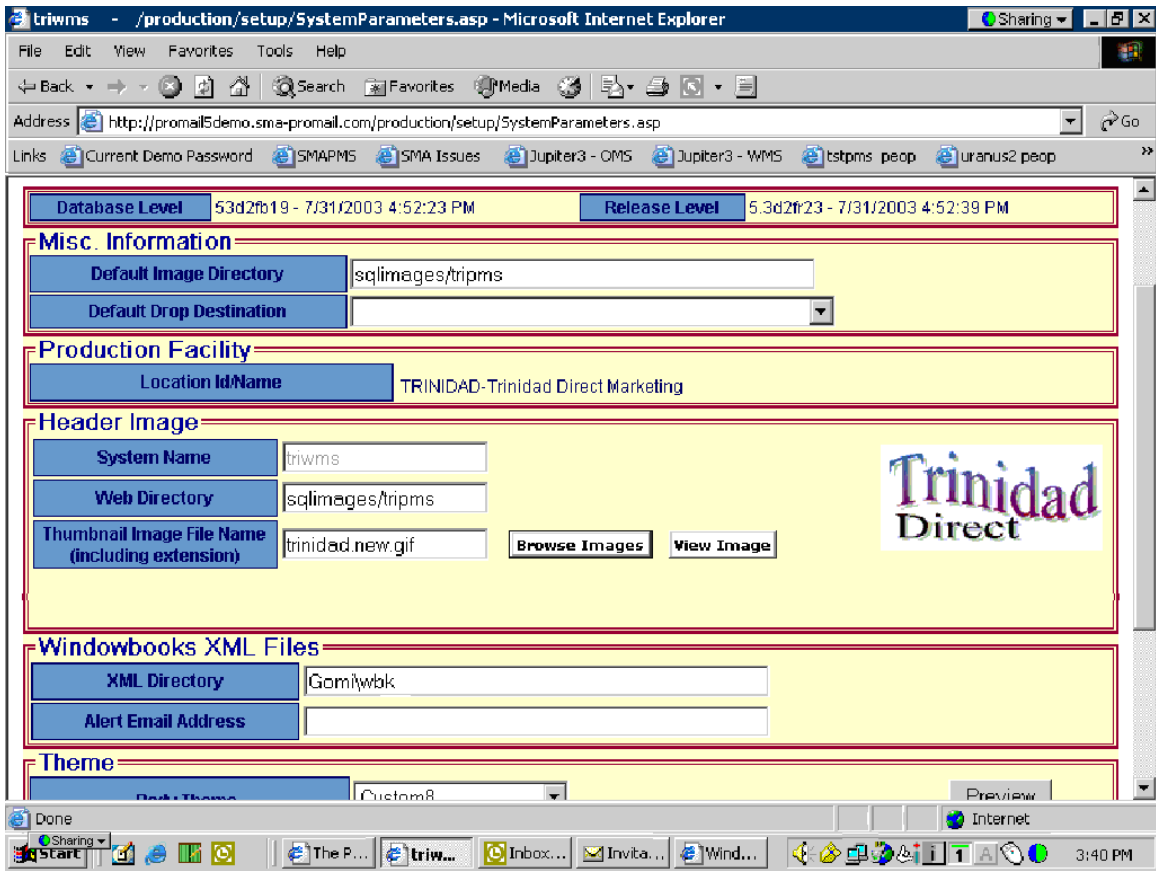
Set the **Export Path Name** to the folder that PRO-MAIL will use to receive the work ticket data (i.e. S:\GOMI).

Do check the **PRO-MAIL 5** checkbox as the Export Format.

Do Not check the box to allow export of container detail.

Now click on the **OK** button to save your settings.

IN THE PRO-MAIL 5 SOFTWARE:



In the Production Control System, go to Setup, System Parameters then set XML directory to Gomi (or a subfolder of Gomi if you wish).

PROJECT MANAGEMENT

1. Make sure the Postage Liability and Postage Inventory Accounts have been assigned account numbers in the Setup Screen.
2. Import Entry Point information. You can export a list of USPS entry points from the file menu of your DAT_MAIL Statement Printing Program then import it in PRO-MAIL's Project Management System. To import the Window Book file of destinations, log into the Production Control . Go into Utilities > Import Drop Destinations. The file should reside in Gomi. Enter the file name to import or browse the directory to select the file

USING DAT-MAIL™ WITH PRO-MAIL 5

Creating Work Tickets from Mail.dat Information

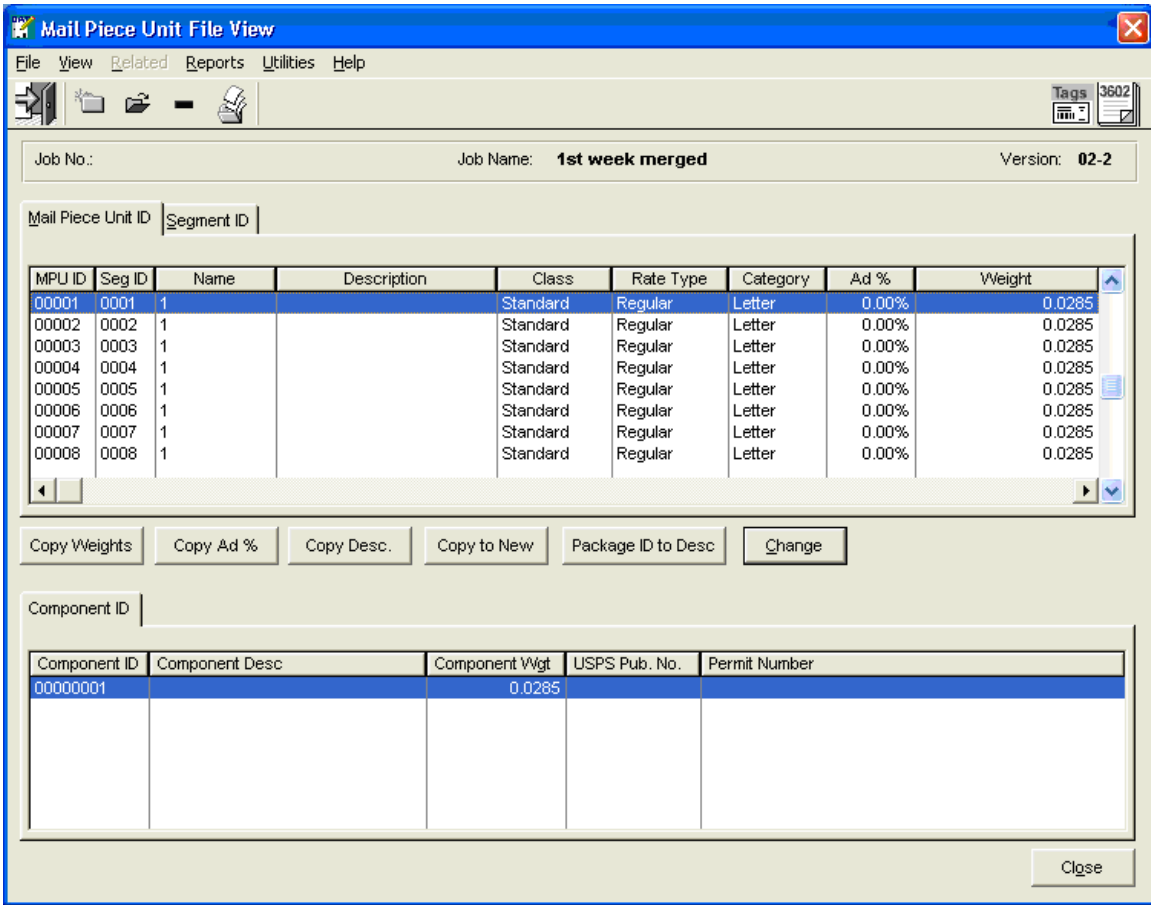
After you import Mail.dat files for a job, you can make whatever changes you wish such as using our 'Quick Plan' or Planalyzer to optimize your entry plan. You can also assign Package Numbers to match those already created or, force PRO-MAIL to create new packages for each version.

MAKE SURE THE JOB NUMBER IS CORRECT

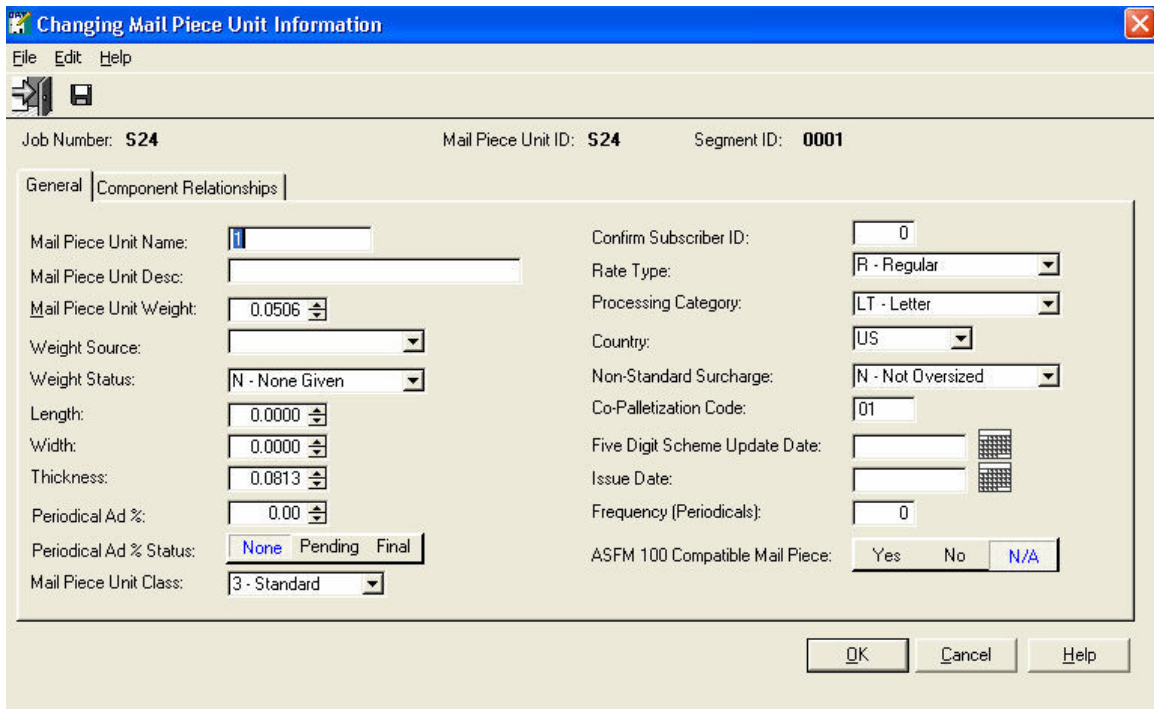
Look at the job number at the top of the screen. If that is not right, you can correct it by clicking on the View menu and selecting File Info view. Change the Job Number so that it matches the one you have in PRO-MAIL

ASSIGNING PACKAGE NUMBERS

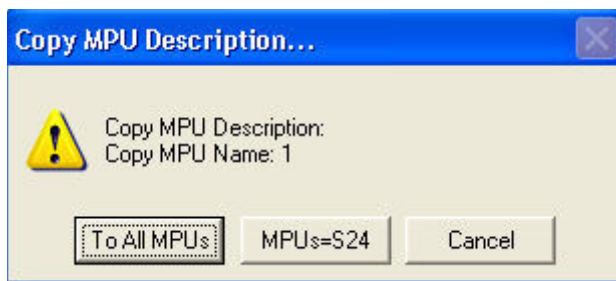
Package Numbers: You normally would have defined your packages before even doing the presort. What you want to do is assign the PRO-MAIL package number to your Mail.dat information before you do your first export to PRO-MAIL. This way your existing package information is used. If you do not do this, PRO-MAIL will create new packages for each MPU Name, and you will have to define each packages' contents in PRO-MAIL. In Mail.dat, the PRO-MAIL package number is represented by the MPU Name. To see this information as it exists in your Mail.dat file, click on the View menu and select Mail Piece Unit File view after you have imported or opened a Mail.dat file in DAT-MAIL™. You can easily assign a PRO-MAIL 5 package ID to the MPU Name field by highlighting an MPU record and pressing the "Package ID to Description" button. This will give you a list of PRO-MAIL 5 Package ID's and you can select the one you want. You can then copy that package to other MPU records by using the "Copy Desc." Button or change the other MPU records individually



In the example above, the Package Name for all MPU names is "1"(MPU is a version but there is a different MPU record created for each 'segment' in the mailing). This means that when PRO-MAIL imports this data, it will assign package 1 to this mailing. If Package 1 is already defined, you will be ready to create work tickets.



If there were multiple MPU records in the Mail.dat file, you would need to copy the MPU name to each record. If a mailing has multiple segments, the same MPU Name is needed many times, even though the mailing was for identical versions.



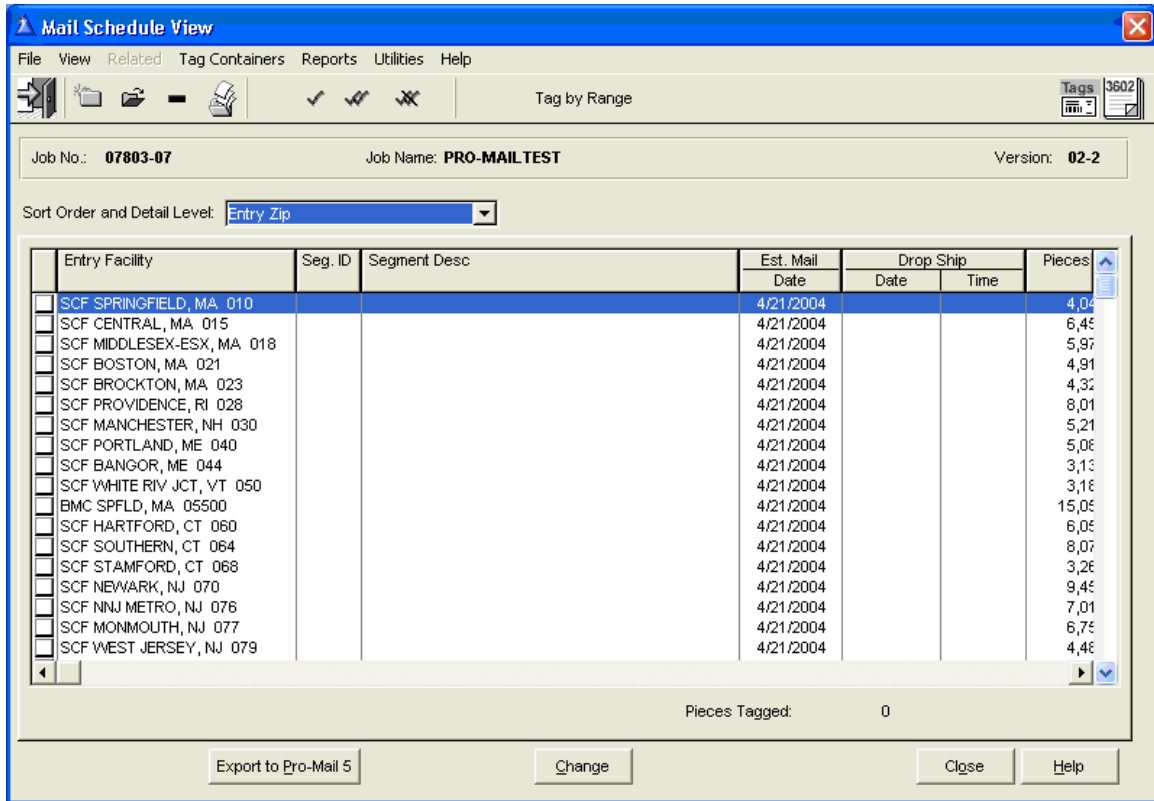
Highlight the record you just changed and press the 'Copy Desc.' button. You can copy the new MPU name to all MPU records or to just the records with the same original MPU name.

CREATING AND SCHEDULING DROPS FOR WORK TICKETS

When such changes are complete, click on the View menu and select Mail Schedule View. In this view you can easily schedule the drop dates for each entry point. If you are participating in CONFIRM, you can also schedule the dates and times each shipment is supposed to reach the appropriate mailing

facility.

The MAIL SCHEDULE VIEW lets you sort your data each way. Drop Numbers will be assigned in the displayed order to all entry points. This tab may be more convenient even for large single segment mailings since it features a 'tag table' that allows you to mark a number of records which are being shipped on the same date. Tag all the records you are shipping on a single day, chance one of the tagged records and change the mail date to the correct date. Note: In-Home date must be later than Mail Date even if you do not use In-Home date.



You can tag the entry points you want to change by using the Tag check marks, Tag by Range button, or the wite boxes to the left of each line item. This view allows for Windows tagging conventions so that you can left-click on the first entry point, and then hold the shift key down and tag the last. All items in between will be tagged.

When all items that are going to be mailed on a particular date are tagged, you would highlight one of these entries and press the CHANGE button. This would present the following screen:

Update Records...

Entry Point: 040 **SCF PORTLAND ME 040**
Facility Type: S

Est. Mail Date In Home Del. Date Delivery Window
10/15/2001 2/18/2002 3

Est. Drop Date Est. Drop Time DS Appt No.

Update CSM Trailer Info

OK Cancel

You would then enter the estimated mailing date or press the calendar lookup button to select this date from a calendar. You must also select an in-home date. If you are participating in CONFIRM, you would also press the Estimated Drop Date, which is the date the mail is expected to reach the postal facility (not the date 'dropped' by the mailer which is really the estimated mailing date). You can also enter the estimated time that the shipment is supposed to arrive at the postal facility and the drop ship appointment number, if either known in the Estimated Drop Time and DS Appointment No. fields. Press OK to save. The information will be updated and displayed on the list.

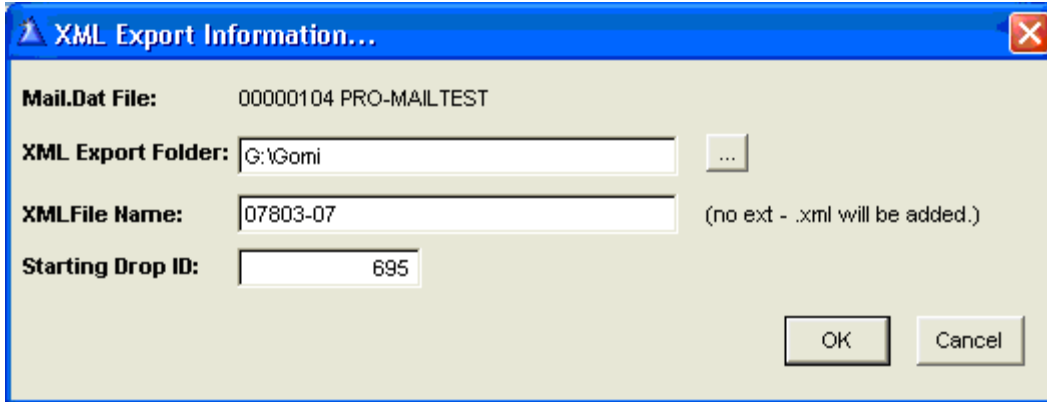
When all the drop dates are correct, press the **Export to PRO-MAIL 5** button. You will get this message:

XML Export Drop ID's...

? This process will assign new DropID's and export data to XML.
Do you want to continue?

Yes Cancel

Next you will be able to see where the file will be created and what its' name will be (though you won't really need to know this since PRO-MAIL will import your data automatically). You can set the starting drop ID to whatever you want. Drop ID's will be unique across all jobs unless you reset to 1 on this screen.



When you click **OK**, the data for this mailing will be passed to PRO-MAIL. You should be able to retrieve this in PRO-MAIL to create work tickets about a minute after the export has stopped.

Creating Statements

Now that you have created work ticket information, your next step is to create the actual Postage Statements. In DAT-MAIL™ that is done in the Generate Statements View. This process will go just as it does for other DAT-MAIL™ users. The difference is that on the statement generate screen, the Job, Client and Permit lookup will be coming from PRO-MAIL 5. Any new information selected will be automatically imported into DAT-MAIL™'s own 'master files' during statement generation. Once statement data is generated, you can print statements and reports from the DAT-MAIL™ Statement printing program. See the User Guide section titled "Mail.dat Statement Generation" for detailed instructions on how this is done. If, when printing a report for a job, you do not see the job you want listed, it is very unlikely that there is any statement information present in the system for that job. You can press the 'Pro Mail Sync' button on the Job, Client or Permit File lookup to be sure that DAT-MAIL™'s master files include entries for all of the PRO-MAIL jobs, entities or permits but this will rarely be necessary.

Manually (without a Mail.dat file)

DAT-MAIL™ allows you to not only create statements from Mail.dat but also to create them without Mail.dat. When you create a statement from Mail.dat, we are assuming you are passing the drop information to the PRO-MAIL Work Ticket program before creating statements. This is how PRO-MAIL will know about the Drops in the system and have packages assigned.

When creating manual statements with DAT-MAIL™, you may either use the drop data you have setup in PRO-MAIL 5 in advance or create the drops on the fly by entering a drop number into Post Master™'s 'Lot' field that has not already

been used to define a drop for the job you are creating statements for. DAT-MAIL™'s "LOT" field is used for the PRO-MAIL Drop Number and the "Package" field is used for the package number. Lookups are provided for each of the fields. The Drop lookup will display automatically after you select a job so you can select a valid drop for that job. When you get to the Package field, press that lookup button and select a valid drop for that job. The single piece weight will be populated on the statement automatically, although you can override it. Both the Lot and Package fields are required.

Important Note: You do NOT have to select a PRO-MAIL 5 Drop when creating statements manually. If the drop number you wish to assign is not already in PRO-MAIL, you may enter your own, though you should take care to make it unique for the job. When the statement is imported into PRO-MAIL 5, the drop will be added automatically.

Unlike the Drop Number, you MUST use a valid PRO-MAIL 5 Package ID when creating statements otherwise the statement data will fail to be imported.

Please reference the User Guide section titled "Manual Statements to access detailed information on the steps to create these statements.

Unlike PRO-MAIL 4, PRO-MAIL 5 and DAT-MAIL™ support multiple packages per drop, so you can create statements with either 1 package per drop or multiple packages per drop. Here is how:

Creating Single Package per Drop Statements Manually

- a. When creating a "Normal" (single package) statement, enter the job number and press TAB. You can also lookup the job directly from PRO-MAIL's table by pressing the lookup button to the right of the Job field.
- b. Select the Drop. After you select or entry the job, you will see a list of drops appear. Select one. The program will update the 'Lot' field with the drop number and select the appropriate entry point for you automatically.
- c. Press the lookup button next to the Package Field and select a PRO-MAIL package. The weight of the package will be updated to DAT-MAIL™'s Weight field. The weight will be in ounces or lbs depending on what was originally setup in PRO-MAIL 5.
- d. Select the Permit by pressing the lookup button. This permit info is coming right from PRO-MAIL's tables.
- e. Proceed by entering the rest of the statement information on the applicable tabs and then print.

Creating Multi-Package per Drop Statements (First Class and Standard Mail Only)

- a. When creating a new statement, indicate “multi-package” as the statement type in the first entry field (type).
- b. Select a job, then a drop as described for single package statements.
- c. Enter the rest of the statement info on the first tab, making sure to enter something in the piece weight field, even if it is not correct.
- d. Go to the Calculation Tab and double click on any rate. You will see button and you will see the “Multi Job/Client listing. Press the Insert key go to the Package field. Press the lookup button and select a package.
- e. Click on the Calculation tab and enter your piece counts for this package. When done press the OK button at the top of the screen, then press the Insert button again to add a new package. Then select which package that is and enter your piece counts.
- f. Repeat until all packages for this drop have been entered. Remember, this feature only allows you to create drops with multiple packages. If you want to create statements with multiple drops, you should be creating Consolidated statements.

Transferring Postage Data to PRO-MAIL 5

1. Go to the Statement Menu and open the appropriate statement list. Use the icon with the blue checkmark on the toolbar to Verify all statements that have been round stamped and whose postage matches the amount in the database. You can view the total postage without editing the statement by pressing ‘details’ button, or by scrolling to the right. Verifying the statement indicates the postage is final and you will not easily be able to delete or change this statement.
2. Go to the File Menu and select the option to Export to PRO-MAIL. Within a minute or so all your postage data will automatically show up in PRO-MAIL.
3. Transferring BMC, SCF and ADC data to PRO-MAIL 5.
 - a. Go to the File menu
 - b. Select ‘Export Entry Points’. The labeling list data in DAT-MAIL™ will be transferred to PRO-MAIL 5.0. Note- at this time ADC’s used by Periodical

Mailers are listed with BMC's. When setting up a BMC drop for Standard Mail or Parcel Services, be sure to select the BMC, not ADC entry.

Running Reports

When running some of DAT-MAIL™'s many reports, you are often asked to do a report for a single client, job or permit. Any client, job or permit which has statement activity should already be listed. If for any reason, you do not see the job, client or permit you think should be there, press the PRO-MAIL Sync button on the browse. This will refresh DAT-MAIL™'s own tables with info from PRO-MAIL's tables. If the item you are looking for still does not appear after synchronization, the permit, client, or job may exist in PRO-MAIL, but there has not been any statement activity yet for DAT-MAIL™ to report on.
