



User Guide

Version 2, Created December 18, 2019

ABOUT THIS GUIDE

The instructions and descriptions contained in this document were accurate at the time of publishing; however, succeeding products and documents are subject to change without notice. Therefore, Window Book, Inc. assumes no liability for damages incurred directly or indirectly from errors, omissions, or discrepancies between the product and this document.

This document is formatted for 2-sided printing.

wbSCAN™, DAT-MAIL™, Advanced Workflow Automation Manager™, AWAM™, Automation Scheduler™, and PostalWeb Connector™ are trademarks of Window Book, Inc.

The following are trademarks (indicated by [™]) or registered trademarks (indicated by [®]) are owned by the United States Postal Service: USPS®; *PostalOne!*®; and ZIP+4®.

Mail.dat® is a registered trademark of the International Digital Enterprise Alliance, Inc. (IDEAlliance). Windows® is a registered trademark of Microsoft Corporation in the United States and/or other countries.

ZEBRA™ is a trademark of ZIH Corp.

MOTOROLA™ is a trademark of Motorola Trademark Holdings, LLC.

Intermec® is a registered trademark of Intermec Technologies Corporation.

Janam[™], and XT30 Series[™] are trademarks of Janam Technologies LLC.

IOS® is a trademark or registered trademark of Cisco in the U.S. and other countries and is used under license.

Android™ is a trademark of Google LLC.

Scandit® is a registered trademark of Scandit AG.

All other product names are trademarks, registered trademarks, or service marks of their respective owners.

Copyright © 2020 Window Book, Inc. All rights reserved. All intellectual property rights remain the property of Window Book, Inc. No part of this publication may be reproduced, distributed, modified, displayed, transmitted, stored in a retrieval system, or translated into any human or computer language, in any form or by any means, electronic, mechanical, magnetic, optical, chemical, manual, or otherwise, without the prior written permission of the copyright owner, Window Book, Inc., 300 Franklin Street, Cambridge, MA 02139.

wb\$CAN™ User Guide

CONTACT INFORMATION

WINDOW BOOK, INC.

300 Franklin Street Cambridge, MA 02139

Corporate: 617-395-4500 Client Services: 800-524-0380

sales@windowbook.com

Support: Support Portal 800-477-3602

techsupport@windowbook.com

Fax: 617-395-5900

On the Web: <u>www.windowbook.com</u>

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 document	Revised	ABOUT THIS GUIDE and page footers	Updated trademark and copyright information.
Updated document	Revised	Throughout	With the introduction of additional functionality, reorganized Guide for clarity. Guide now contains an "About This Guide", "Table of Contents", "Before You Begin", "Getting Started", "Component Description & Use", and "Additional Feature Information" sections only. A separation between DIME and Non-DIME related functionality (version 1) no longer exists. Anny setup instructions have been removed and are now available in the wbSCAN Installation Guide.

CHANGE	TYPE	LOCATION IN GUIDE	DETAIL	
Updated document	Revised	Throughout	Replaced all instances of "MailDrop Engine" with "PostalWeb Connector".	
Updated document	Revised	Throughout	Updated images where necessary.	
Updated section	Revision	REQUIREMENTS	Replaced existing "Server" and "Scanning Devices" sections with a table that provides information on the requirements for using wbSCA in two ways: As a Quality Assurance/Verification tool; and as part of DAT-MAIL's Multi-Carrier Trailer Manifesting function. Included "Server" line-item with footnote pertaining to the unregistered version of wbSCAN. Updated the supported wireless scanning devices.	
Added section	New	Other Software Documentation	Added links to other Window Book product documentation.	
Added section	New	WBSCAN ESSENTIALS	Added information about the unregistered version of wbSCAN available to all DAT-MAIL users, including a product feature/benefit list.	
Updated section	Revised	LOGGING IN	Updated section to include information on login credentials and DAT-MAIL's 'Security' module.	
Updated section	Revised	SESSION TIME OUT	Corrected procedure to include stopping the service.	
Deleted section	Deletion	"Planned Enhancements"	Removed section.	

CHANGE	TYPE	LOCATION IN GUIDE	DETAIL
Added section	New	SCAN BUTTON	Moved and updated any existing information for the options under the 'Scan' button to this section (i.e. Activate Pallets, Deactivate Pallets, Move Pallets, Verify Pallets in Manifest, Add Pallets to Manifest, and Search Barcode). Added any new information as it pertained to the Scan2Pay function.
Added section	New	BROWSE BUTTON	Added information pertaining to the 'Browse' button and the options accessible from it, i.e. MD Import Log, Manifests, Scan Log, Locations, Categories (i.e. Locations & Categories), Report Groups, View Dashboard, Dashboard Settings, Scan2Pay Settings, and Run Time Settings.
Added section	New	ADDITIONAL FEATURE INFORMATION	Added setup and use information pertaining to Scan2Pay.

This page left blank intentionally.

TABLE OF CONTENTS

ABOUT THIS GUIDE	
CONTACT INFORMATION	3
REVISION HISTORY	3
TABLE OF CONTENTS	7
BEFORE YOU BEGIN	9
SYMBOLS YOU SHOULD KNOW	g
PURPOSE	g
INTRODUCTION	S
REQUIREMENTS	10
Other Software Documentation	12
GETTING STARTED	13
WBSCAN ESSENTIALS	13
LOGGING IN	14
SESSION TIME OUT	15
DIME USERS	16
Add Content Title & Reference Information to Jobs	16
Scan Origin Pallets	17
COMPONENT DESCRIPTION & USE	19
SCAN BUTTON	20
Activate Pallets	20
ACTIVATE 'SCAN' TAB	21
ACTIVATE 'SCAN LOG' TAB	23
Deleting Scanned Pallets	
ACTIVATE PALLETS 'SCAN2PAY' TAB	
Deactivate Pallets	
DEACTIVATE 'SCAN' TAB	
DEACTIVATE 'SCAN LOG' TAB	
Move Pallets	
MOVE 'SCAN' TAB	
MOVE 'SCAN LOG' TAB	
MOVE 'SCAN2PAY' TAB	
Verify Pallets in Manifest	

Table of Contents

VERIFY 'SCAN' TAB	32
VERIFY PALLETS IN MANIFEST 'SCAN LOG' TAB	34
Deleting A Verified Pallet From A Manifest	35
VERIFY PALLETS IN MANIFEST 'PALLETS' TAB	36
VERIFY PALLETS IN MANIFEST 'SCAN2PAY' TAB	38
Add Pallets to Manifest	38
ADD PALLETS TO MANIFEST 'SCAN' TAB	39
ADD PALLETS TO MANIFEST 'SCAN LOG' TAB	41
Deleting Pallets From A Manifest	43
ADD PALLETS TO MANIFEST 'PALLETS' TAB	44
ADD PALLETS TO MANIFEST 'SCAN2PAY' TAB	46
Search Barcode	47
SEARCH BARCODE > PRINT TAGS & CREATING SIBLINGS	48
BROWSE BUTTON	50
MD Import Log	50
Manifests	51
CREATE A MANIFEST	52
Stops For Direct Trailers	54
Creating Stops	54
Editing Stop Information	57
Deleting Stops	57
Changing Stop Order	58
Scan Log	59
Locations and Categories	59
Report Groups	62
View Dashboard	63
Dashboard Settings	65
Scan2Pay Settings	67
Runtime Settings	69
LOGOUT BUTTON	70
ADDITIONAL FEATURE INFORMATION	71
SCAN2PAY	71
Scan2Pay – Getting Started	71
HOW SCAN2PAY WORKS	

BEFORE YOU BEGIN

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 helpful hints and resolutions for some of the more common issues that can occur during operation.

PURPOSE

The purpose of this Guide is to provide use instructions for Window Book's wbSCAN™ application. Installation instructions are provided in the "wbSCAN Installation Guide".

INTRODUCTION

wbSCAN expands DAT-MAIL's reach to our Client's shop floor. This is a light-weight webserver that allows the browser on network connected handhelds, tablets, and desktop computers to interact with their DAT-MAIL data in real time. Current functions include:

- Remotely trigger PostalOne!® payments for activated pallets using "Scan2Pay";
- Real-time trailer manifesting with LSC Logistics via the DIME™ interface;
- Alert if mailer attempt to add an origin pallet to a consolidation center manifest;
- Pallet warehouse inventory control;

- Mail production visibility and metrics;
- Automating DAT-MAIL™ back office functions like paying for postage and changing piece weights;
- Quality assurance to avoid assessments, particularly nesting errors and undocumented pieces;
 and
- Improving shop floor productivity by providing tray tag and pallet placard reprinting functions.

REQUIREMENTS

The requirements for installing wbSCAN are dependent on how wbSCAN is being used. wbSCAN can be used for quality assurance/verification purposes only. Mailers can also use wbSCAN in conjunction with the Multi-Carrier Trailer Manifesting function provided in DAT-MAIL. The table below provides information on what requirements are necessary for one or both use types.

	wbscan use	
REQUIREMENTS	Quality Assurance / Verification	Multi- Carrier Trailer Manifesting
SERVER		
Installation of wbSCAN must occur on the same server where the DAT-MAIL program files reside (i.e. not on a workstation or a data server). The wbSCAN service cannot be executed on more than one computer.	X	Х
DAT-MAIL software version 21.19.11.10 (or newer) must be installed.	х	Х
wbSCAN Essentials (unregistered version of wbSCAN (refer to <u>UNREGISTERED USERS</u> for more information))	X¹	
The DAT-MAIL software must be registered using a wbSCAN-specific registration key.	x	Х
The DAT-MAIL/wbSCAN server must have a static IP address.	Х	Х
Adequate machine memory to support sessions for each device that will simultaneously access the service.	Х	Х
No other web server listening to Port 80 (or 443 – secure installations) on the DAT-MAIL server.	х	х

¹ Functionality is limited in the unregistered version of wbSCAN.

	wbSCAN USE	
REQUIREMENTS	Quality Assurance / Verification	Multi- Carrier Trailer Manifesting
Port 80 (or 443 – secure installations) must be open to traffic originating on the network.	х	х
Wireless router for the shop floor (if using wireless devices)	Х	Х
The following must be completed in DAT-MAIL before using wbSCAN: Carrier and Distribution Lists must be added, and the necessary settings completed in the Setup screen's Logistics tab for Non-LSC and/or LSC Users. Refer to the "Multi-Carrier Trailer Manifesting Setup & User Guide"; specifically, the "Getting Started" section for instructions.		Х
Installation of the most recently published version of the Automation Scheduler™ with Auto Postal Updates plug-in (refer to OTHER COMPONENT INSTALLATION for more information).		Х
AWAM™ must be activated (requires an AWAM registration key) and set up in DAT-MAIL for <u>Scan2Pay</u> users incorporating automation into their workflow.		х
wbSCAN's <u>Scan2Pay</u> must be enabled and set up in DAT-MAIL and <u>trigger functions enabled in wbSCAN</u> .		Х
For <u>Scan2Pay</u> users fully automating the postage payment process, PostalWeb Connector™ must be installed (requires a PostalWeb registration key) and configured for uploading Mail.dat files to <i>PostalOne!</i> . This also requires additional setup in DAT-MAIL.		Х
SCANNING DEVICES		
PC's and Tablets using USB wired or Bluetooth "wedge" scanners (such as the Socket® Mobile Durascan D700).	Х	Х
Wireless devices – includes but is not limited to, most Windows® CE industrial devices with "keyboard wedge" browser functionality. These devices can be purchased new, refurbished or used:		
~ ZEBRA™ TC-51 or TC-56;		
~ MOTOROLA™ models MC9090G; MC9200, MC9190, MC55A0;		х
~ Intermec® CK5;		
~ Janam™ XT30 and XG200.		

	wbSCA	N USE
REQUIREMENTS	Quality Assurance / Verification	Multi- Carrier Trailer Manifesting
Smart Phones: iOS® and Android™ devices require the Scandit® Keyboard Wedge app (inquire for details) or the Socket® Mobile Durascan D700, and a hardened case and extended battery are strongly recommended.	Х	X

Other Software Documentation

Additional installation and/or setup of other Window Book products called out in the table above is required for using many of the wbSCAN functions associated with Multi-Carrier Trailer Manifesting. Links to the product document for each are provided below.

- The "Multi-Carrier Trailer Manifesting Setup & User Guide"; specifically, the "Getting Started" section (REQUIRED).
- The "AWAM Setup Guide" (necessary for using Scan2Pay with automation).
- The "AWAM User Guide" (helpful for information on how AWAM works).
- The "PostalWeb Connector Installation & User Guide" (necessary for use with Scan2Pay if submitting Mail.dat files to PostalOne! for total automation).
- The "<u>DAT-MAIL MSSQL Installation & Update Guide</u>"; specifically, the "Getting Started in DAT-MAIL" and "Enabling the Automatic Upload Of Files To PostalOne! In DAT-MAIL" sections (necessary for use with Scan2Pay if submitting Mail.dat files to *PostalOne!* for total automation).

GETTING STARTED

This section provides important product-specific and user-specific information that users should be aware of before using wbSCAN.

WBSCAN ESSENTIALS

A "lite" or unregistered version of wbSCAN referred to as wbSCAN Essentials is available to all DAT-MAIL users running DAT-MAIL version 21.19.09.17 and newer. wbSCAN Essential users install/activate wbSCAN just like registered users. Refer to the wbSCAN Installation Guide for instructions.

Functionality in wbSCAN Essentials is limited; however, users can still take advantage of wbSCAN's 'Search Barcode' function, which allows the user to:

- Meet in-home dates through more accurate preparation;
- Improve Mailer Scorecard results including avoiding undocumented pieces;
- View information about any piece, tray or pallet barcode you scan;
- Confirm that mail piece ZIP+4® matches Mail.dat® ZIP+4; and
- Ensure the scanned barcodes map to active Mail.dat files that are going to PostalOne!® to avoid undocumented pieces.

For more information, refer to <u>Search Barcode</u> in this document.

Below is a wbSCAN feature list and corresponding benefit. In addition, which product version provides the feature/benefit is also provided:

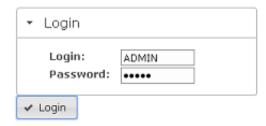
Feature	Benefits	wbSCAN Essentials	wbSCAN Full Feature
Confirmation that barcode belongs to current Mail.dat revision	Helps list mailers avoid undocumented piece assessments by warning them barcode is not associated with latest presort revision.	X	X
Nesting QA	Makes it easy to check that the right trays are on the right pallets and the right pieces are in the right trays. Also helps mailers that palletize across multiple Mail.dat file put the right trays on the right pallets without looking at a hardcopy report.	X	X

Feature	Benefits	wbSCAN Essentials	wbSCAN Full Feature
Reprint tray tags or create sibling tags with a piece scan	Saves a significant amount of time helping mailers comply with Full-Service & Seamless Acceptance requirements of documenting every tray correctly.	Х	×
Pallet Warehouse Management	Track the location of each pallet.		X
Activation Scanning *	Scan pallets when they are wrapped to indicate ready to ship. Makes planning trailers much easier.		х
Production function scanning with Production Dashboard	Scan mail as it goes through production and see progress of each job on the wbSCAN Dashboard!		х
Adding pallets to trailer manifests *	Quickly account for every pallet shipped and make sure none are left		Х
Verify pre-planned trailer manifest *	behind or loaded on the wrong trailer.		Х
* Enhances Multi-Carrier Trailer Manifesting included in DAT-MAIL Toolbox or available separately			

wbSCAN Essentials users should also refer to the <u>LOGGING IN</u> and <u>SESSION TIME OUT</u> sections in this document for additional, pertinent information.

LOGGING IN

Access to wbSCAN is controlled by DAT-MAIL's 'Security' function; however, users do not have to have the Security function available in DAT-MAIL to use wbSCAN. By default, wbSCAN uses the same login credentials that the 'Security' function does (i.e. Login = ADMIN; Password = ADMIN). This is true whether or not the Security function is accessible in DAT-MAIL.



Getting Started

If Clients want to change these default credentials, or further restrict access to wbSCAN to specific groups or users; however, they can only do so using the 'Security' function.



Whether or not the 'Security' function displays in DAT-MAIL (i.e. option on the main menu) is controlled by a Client's DAT-MAIL registration code. If the Security function does not display in DAT-MAIL, Clients will have to update their DAT-MAIL registration with a new code obtained from Window Book (no charge).

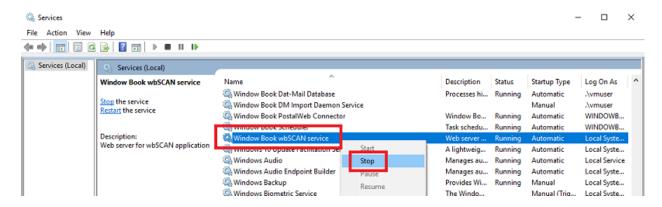


SESSION TIME OUT

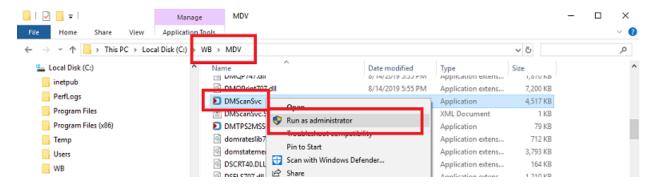
The default session timeout for wbSCAN is 15 minutes. If a login is idle for 15 minutes, wbSCAN will require the user to login again to be able to continue to use the application. The Client can adjust the default timeout of 15 minutes if they wish.

To change the default session timeout...

Stop the 'Window Book wbSCAN service' from within Control Panel > Administrative Tools >
 Services:



2. Right-click on the "DMScanSvc.exe" file on the DAT-MAIL server and select 'Run as administrator'. The executable file is located in the '...\WB\MDV' folder;



3. The wbSCAN web server screen will display. Select the 'Settings' tab, and then the 'Site' tab that's within the 'Settings' tab. Make the desired adjustment to the 'Session Timeout' (default is 15 minutes). Click the **Close** button to save the changes; and



4. Make sure to Start the 'Window Book wbSCAN service'.

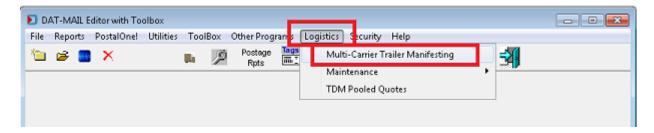
DIME USERS

The information provided in this section assumes DIME has already been enabled/set up in DAT-MAIL. Instructions for enabling DIME in DAT-MAIL are provided in the "Multi-Carrier Trailer Manifesting Setup & User Guide"; specifically, the "Getting Started" section.

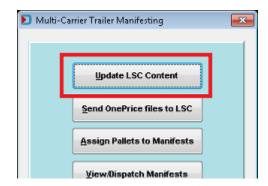
Add Content Title & Reference Information to Jobs

DIME users need to use the 'Update LSC Content' option in DAT-MAIL to add Content Title and reference information to the jobs that are to be processed <u>before</u> using wbSCAN to activate pallets or add them to a manifest.

The 'Update LSC Content' option is available via the 'Logistics' > 'Multi-Carrier Trailer Manifesting' menus in DAT-MAIL.



Instructions for using the 'Update LSC Content' function are provided in the "Multi-Carrier Trailer Manifesting Setup & User Guide".



Scan Origin Pallets

LSC does not want origin pallets on trailers going to consolidation centers. If one is scanned, a warning will be issued, and the scan will be rejected. DO NOT LOAD THIS PALLET ON A TRAILER!

However, If the origin entry point is also an SCF or NDC (Origin SCF or Origin NDC), the pallet can be loaded, even if there is no mail on the pallet with a drop ship discount.

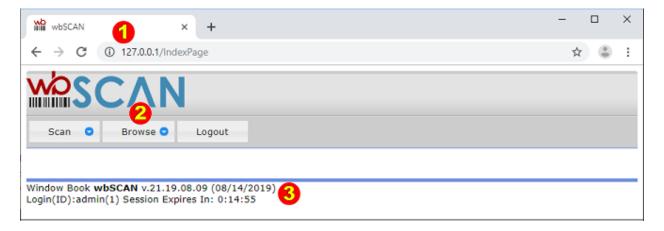
This page left blank intentionally.

COMPONENT DESCRIPTION & USE

This section assumes wbSCAN has been installed and is accessible via the preferred web browser.

Installation instructions are provided in the "wbSCAN Installation Guide".

After successfully logging in to wbSCAN, the home or main page will display.



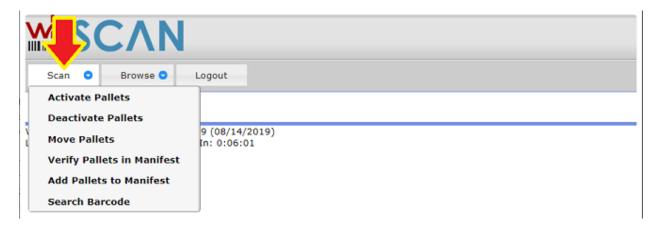
IP address: A generic, non-private IP address of 127.0.0.1 can be used to access wbSCAN unless a single installation is being accessed across a network. Then, the IPv4 IP address (i.e. private IP address) would be used (refer to the "wbSCAN Installation Guide" for more information).

Main Menu Bar: The main menu bar is comprised of three buttons: Scan; Browse; and Logout. The **Scan** button and the **Browse** button expand when clicked to display more options. The **Logout** button is used to log out of wbSCAN. More information on each of the buttons is provided below.

Application Information: The version of wbSCAN being used, the user currently logged into the system, and the amount of time left for the current login before the session expires or times out is displayed at the bottom of the screen. In the image above, version 21.19.08.09 (08/14/2019) is being used, the login ID of "admin" is currently logged into the system, and the amount of time left for the session before it expires, or times out is "0:14:55". The version of wbSCAN being used correlates with the version of DAT-MAIL that is currently installed on the server.

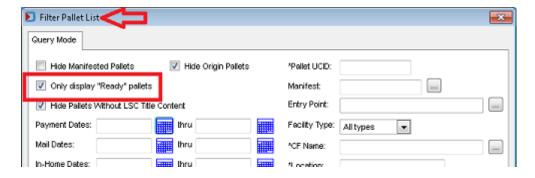
SCAN BUTTON

When clicked, the Scan button expands to display further options related to scanning.



Activate Pallets

The "Activate" function records that a pallet has been produced and is ready to ship. In DAT-MAIL's Multi-Carrier Trailer Manifesting, the pallet list can be restricted to display only the ones that have been activated (i.e. are ready-to-ship), which will make it easier to select pallets for a trailer manifest.



Selecting the 'Activate Pallets' option in wbSCAN displays the *Activate Pallets* screen. The screen consists of two tabs: 'Scan'; and 'Scan Log'. If the Activate Pallets action is enabled as a trigger for the Scan2Pay function, a third 'Scan2Pay' tab will also display (see image below). Refer to Scan2Pay Settings for more information.

The <u>'Scan' tab</u> is used to scan an existing pallet to record that it has been produced (i.e. is complete) and is ready to ship, and the <u>'Scan Log' tab</u> displays the list of pallets that the user has scanned/activated. The <u>'Scan2Pay' tab</u> (if enabled/displayed) provides the payment status of activated pallets and lets users either mark pallets for payment or actually pay postage for scanned pallets in *PostalOne!* More information about each tab is provided below.



ACTIVATE 'SCAN' TAB

The 'Scan' tab consists of two fields: 'Location'; and 'Scan Value'. The 'Location' field provides the user with the ability to associate pallets that have been produced and are ready to ship with a staging or warehouse location.

To associate the pallets being scanned to a particular location and category (optional), activate (select) or highlight the 'Location' field and enter, scan, or select a location or production function.



Refer to <u>Locations</u> under <u>BROWSE BUTTON</u> in this Guide for more information on Locations and Categories.

To look up a location or production function, click the question mark button to the right of the 'Location' field.

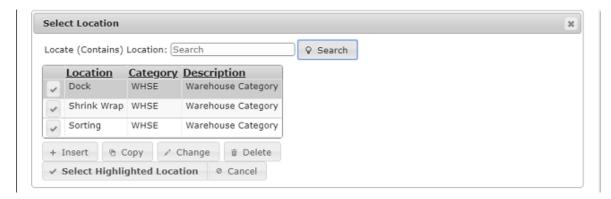


A *Select Location* screen will display. Locations can be searched for on this screen if need be. New locations can be added (i.e. Insert), and existing locations can be copied, changed, or deleted if preferred.



For more information on Locations, refer to <u>Locations and Categories</u> in this Guide.

Select (highlight) the location to be associated with the pallet being activated and click the **Select Highlighted Location** button (or simply click the check-mark next to the location or production function in the list).



The Activate Pallets page will display with the selected location populated in the 'Location' field.



Scan the barcode of the pallet and click the **Save** button. If the barcode reader being used is set up to append a "Return" at the end of the barcode, the barcode will be saved without having to press the **Save** button after each barcode scanned, and the system will automatically be ready for the next scan.

ACTIVATE 'SCAN LOG' TAB

To view a list of the pallets that have been scanned i.e. "activated", click the 'Scan Log' tab.



The list of scanned i.e. "activated", pallets will display on the screen. The following information for each pallet is provided:

- Scan Date: Date the pallet was scanned;
- Scan Time: Time the pallet was scanned;
- Scan Value: Pallet bar code that was scanned. This value corresponds with the Job's Unique Container ID (UCID) in DAT-MAIL;
- Location: Location assigned at time of scan;
- Pallet ID: The Pallet ID corresponds to the Mother Pallet ID in DAT-MAIL;
- Gross Weight: The gross weight of the pallet;
- Manifest ID: The manifest number the pallet is assigned to (if applicable);
- **Action:** Values displayed identify the last 'action' or function that occurred for the corresponding pallet. The possible values are:
 - ~ **CFID**: Consolidation Facility ID;
 - Create: Order created;
 - ~ Edit: Order updated;
 - ~ Add EBoL: Pallet added to manifest;
 - Remove EBoL: Pallet removed from manifest;
 - ~ **Dispatch**: pallet dispatched;
 - ~ **Skip**: Pallet skipped;
 - ~ Cancel: Order cancelled; and
 - ~ **Uncancel**: Order uncancelled.



 A list of scanned pallets can also be viewed by clicking the BROWSE button on wbSCAN's main or home screen and selecting the 'Scan Log' option. Selecting this option displays the 'Scanned Pallets' screen.



Deleting Scanned Pallets

Deleting an activated pallet prevents the pallet from being paid by Scan2pay but does not change its activation status. An activated pallet has been built and is ready to ship. That may still be the case even though the Client may not want to pay for it yet.

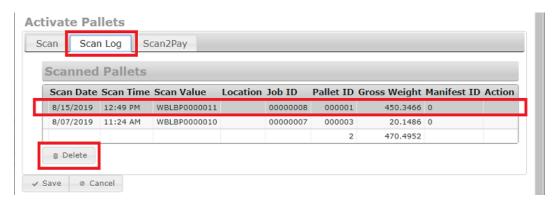


If a user is not using Scan2Pay and erroneously scans or activates a pallet that is not completely built and/or ready to ship, they should 'Deactivate' the pallet versus deleting it. Refer to **Deactivate Pallets for more information.**

To delete a pallet, click the Scan button on wbSCAN's home or main screen and select the 'Activate Pallets' option.

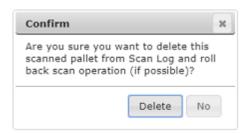


The Activate Pallets screen will display. Select the 'Scan Log' tab. Highlight the pallet in the list that is to be deleted (e.g. WBLBP0000011) and click the **Delete** button.

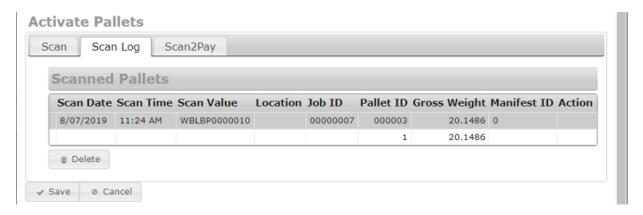


Component Description & Use

A Confirm dialog will display. Click the **Delete** button to close the dialog and continue with the deletion (clicking the No button closes the dialog and aborts the delete process).

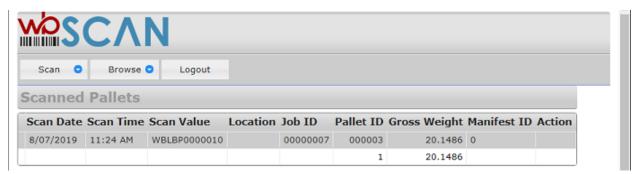


The screen will update and the deleted pallet (e.g. WBLBP0000011) will no longer display in the Scan Log.



The pallet delete function is only available in the 'Scan Log' tab of the 'Activate Pallets' screen. Pallets cannot be deleted from the 'Scanned Pallets' screen, which is accessible from wbSCAN's 'Browse' menu.





ACTIVATE PALLETS 'SCAN2PAY' TAB

This tab is only enabled/displayed if the Activate Pallets action is enabled as a trigger for the Scan2Pay function. Refer to Scan2Pay Settings for more information.



Scan2Pay is a wbSCAN feature that allows mailers to scan pallets as they are produced and let the shop floor staff either mark the pallet for payment or actually pay postage for the scanned pallets in *PostalOne!* For more information on Scan2Pay and how it works, refer to <u>SCAN2PAY</u> in the "Additional Feature Information" section of is Guide.

Deactivate Pallets

Deactivate disables the "activation" flag in the pallet record. It is used to correct mistakes if someone does an activation scan on a pallet that is not actually complete.



The Deactivate Pallets function is different than the <u>Delete function</u> in that "deleting' is intended for pallets that are complete and are ready to ship, but are not ready to be paid (i.e. Scan2Pay. Deactivating is intended for pallets that are not yet built and/or not ready to be shipped. The pallet is not yet complete; therefore, it should be "deactivated".

In the event a pallet needs to be deactivated, select the 'Deactivate Pallets' option from the main 'Scan' menu.



The *Deactivate Pallets* page will display. The page is comprised of two tabs: 'Scan'; and 'Scan Log'. The 'Scan' tab is used to scan an existing pallet in order to deactivate it, and the 'Scan Log' tab displays the list of pallets that the user has scanned/deactivated. More information about both tabs is provided below.

DEACTIVATE 'SCAN' TAB

Enter or select the location or production function associated with the pallet that is to be deactivated (optional). A list of the existing locations or production functions can be viewed by clicking the question mark displayed to the right of the 'Location' field.

Scan the barcode of the pallet that is to be deactivated and click the **Save** button (if necessary - the barcode reader being used may be set up to append a "Return" at the end of the barcode so that clicking the **Save** button is not necessary).

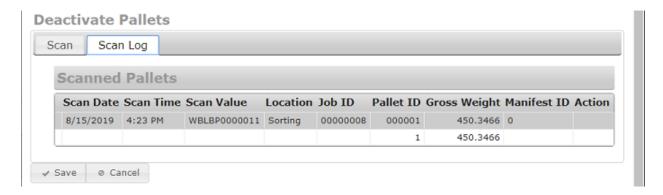


The screen will update and a "Successfully scanned..." message will display.



DEACTIVATE 'SCAN LOG' TAB

To view a list of the pallets that were deactivated, click the 'Scan Log' tab.



The list of deactivated pallets will display on the screen. The following information for each pallet is provided:

- Scan Date: Date the pallet was scanned;
- Scan Time: Time the pallet was scanned;
- Scan Value: Pallet bar code that was scanned. This value corresponds with the Job's Unique Container ID (UCID) in DAT-MAIL;
- Location: Location assigned at time of scan;
- Pallet ID: The Pallet ID corresponds to the Mother Pallet ID in DAT-MAIL;
- **Gross Weight:** The gross weight of the pallet;
- Manifest ID: The manifest number the pallet is assigned to (if applicable);
- **Action:** Values displayed identify the last 'action' or function that occurred for the corresponding pallet. The possible values are:
 - ~ **CFID**: Consolidation Facility ID;
 - ~ Create: Order created;
 - ~ Edit: Order updated;
 - ~ Add EBoL: Pallet added to manifest;
 - ~ Remove EBoL: Pallet removed from manifest;
 - ~ **Dispatch**: pallet dispatched;
 - ~ **Skip**: Pallet skipped;
 - ~ Cancel: Order cancelled; and
 - ~ **Uncancel**: Order uncancelled.

Move Pallets

The 'Move Pallets' function assigns a new location to the scanned pallets. This can be used not only to move pallets from one location to another but is also a way to associate production functions to pallets of mail going through the production process. Locations can be created for different production stages (printing, inserting, bindery, etc.). Then users can scan each placard in the job jacket before starting the process for the mail that will end up on that pallet.

To move a pallet, click the **Scan** button and then select the 'Move Pallets' menu option.



The *Move Pallets* page will display. The screen contains two tabs: 'Scan'; and 'Scan Log'. The 'Scan' tab is used to scan an existing pallet for assigning it to a new/different location, and the 'Scan Log' tab displays the list of pallets that the user has scanned/moved. In addition, a 'Scan2Pay' tab may be displayed. More information about these tabs is provided below.

MOVE 'SCAN' TAB

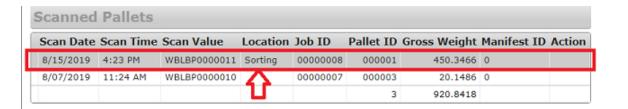
Enter or select the new location or production function that is to be associated with the pallet that is to be moved (required). A list of the existing locations or production functions can be viewed by clicking the question mark displayed to the right of the 'Location' field.



Refer to <u>Locations</u> under <u>BROWSE BUTTON</u> in this Guide for more information on Locations and Categories.

Scan the barcode of the pallet that is to be moved and click the **Save** button (if necessary - the barcode reader being used may be set up to append a "Return" at the end of the barcode so that clicking the **Save** button is not necessary).

In the example below, the pallet was originally activated with a Location of "Sorting".



Using the 'Move Pallets' function, the pallet (e.g. 'WBLBP0000011') was assigned a new Location (i.e. "Shrink Wrap").





MOVE 'SCAN LOG' TAB

To view a list of pallets that were "moved", click the 'Scan Log' tab.



The list of deactivated pallets will display on the screen. The following information for each pallet is provided:

- Scan Date: Date the pallet was scanned;
- Scan Time: Time the pallet was scanned;
- Scan Value: Pallet bar code that was scanned. This value corresponds with the Job's Unique Container ID (UCID) in DAT-MAIL;
- Location: Location assigned at time of scan;
- Pallet ID: The Pallet ID corresponds to the Mother Pallet ID in DAT-MAIL;
- Gross Weight: The gross weight of the pallet;

- Manifest ID: The manifest number the pallet is assigned to (if applicable); and
- **Action:** Values displayed identify the last 'action' or function that occurred for the corresponding pallet. The possible values are:
 - ~ **CFID**: Consolidation Facility ID;
 - Create: Order created;
 - ~ Edit: Order updated;
 - Add EBoL: Pallet added to manifest;
 - ~ Remove EBoL: Pallet removed from manifest;
 - Dispatch: pallet dispatched;
 - ~ **Skip**: Pallet skipped;
 - ~ Cancel: Order cancelled; and
 - ~ **Uncancel**: Order uncancelled.

MOVE 'SCAN2PAY' TAB

This tab is only enabled/displayed if the Move Pallets action is enabled as a trigger for the Scan2Pay function. Refer to Scan2Pay Settings for more information.

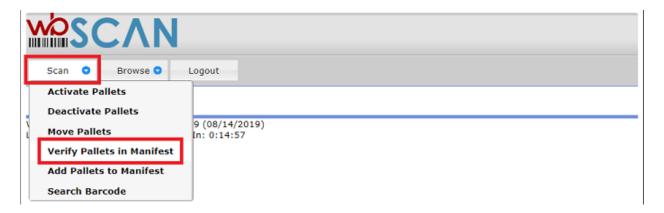


Scan2Pay is a wbSCAN feature that allows mailers to scan pallets as they are produced and let the shop floor staff either mark the pallet for payment or actually pay postage for the scanned pallets in *PostalOne!* For more information on Scan2Pay and how it works, refer to <u>SCAN2PAY</u> in the "Additional Feature Information" section of is Guide.

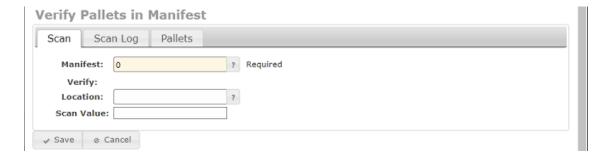
Verify Pallets in Manifest

The 'Verify Pallets In Manifest' function allows users to select a manifest and then scan the pallets as they are loaded onto a trailer. It will show a count of unscanned pallets in the manifest and as each is scanned, the count will be reduced. This tells the operator when they have completed the loading of the trailer. If a pallet that does not belong to the manifest is scanned, the user will be alerted to not load the pallet and the scan will be rejected.

To verify the pallets on a manifest, click the **Scan** button and then select the 'Verify Pallets in Manifest' menu option.



The *Verify Pallets in Manifest* screen will display. The screen contains three tab options: 'Scan'; 'Scan Log'; and 'Pallets'. The 'Scan' tab is used to scan and verify the individual pallets that are associated with a selected manifest, the 'Scan Log' tab displays the list of pallets that the user has scanned for verification, and the 'Pallets' tab displays the list of pallets that are associated with the selected manifest. In addition, a 'Scan2Pay' tab may also display. More information about each tab is provided below.

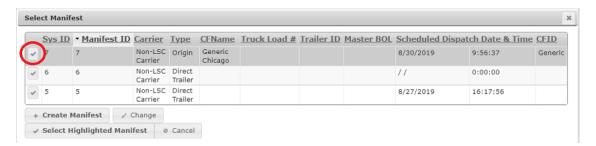


VERIFY 'SCAN' TAB

Select a manifest (required) to verify pallets against. To display the list of existing manifests, click the question mark located to the right of the 'Manifest' field.



The Select Manifest page will display. A list of existing manifests will display. Highlight the manifest to select by single-clicking on it and then click the Select Highlighted Manifest button, or simply click the checkmark that displays immediately to the let of the Manifest ID.





If no manifests exist/are listed, users can create a manifest by clicking the CREATE MANIFEST button. For more information, refer to Creating A Manifest in this Guide for instructions.



When a manifest is selected, the user will automatically be re-directed back to the 'Scan' tab and the manifest ID will be populated in the 'Manifest' field. In addition, the number of pallets and the gross weight contained on the manifest will also display. If the selected manifest is for a trailer type that contains stops, the information pertaining to the first top (i.e. stop location, number of pallet(s), and gross weight) will also display. To view the information for each stop (if there is more than one), click the down-arrow for the 'Stop' field and select a stop from the list.





Component Description & Use

If the user wants to associate the pallet to be scanned/verified to a location or production function (optional), highlight the 'Location' field and enter, scan or select a location from the list of existing locations by clicking the question mark immediately to the right of the 'Location' field. If the pallet is assigned to a specific stop, make sure to select the stop before attempting to associate it with a specific location.

Scan the barcode of the pallet that is to be verified and click the **Save** button (if necessary - the barcode reader being used may be set up to append a "Return" at the end of the barcode so that clicking the **Save** button is not necessary). If the pallet is assigned to a specific stop, make sure to select the stop before attempting to scan/verify it.



The number of pallets on that manifest and the gross weight will be displayed to the right of the 'Verify' field. As pallets are being verified (i.e. scanned), the number of pallets and the gross weight will reduce accordingly.



VERIFY PALLETS IN MANIFEST 'SCAN LOG' TAB

To view a list of pallets that were scanned (i.e. verified) against a particular manifest, click the 'Scan Log' tab. If a manifest was already selected in the 'Scan' tab, the same manifest will remain selected in the Scan Log screen and any pallets that were scanned/verified for it will automatically display.

To view the pallets scanned/verified for a different manifest, click the question mark located to the right of the 'Manifest' field and select a different manifest from the available list.

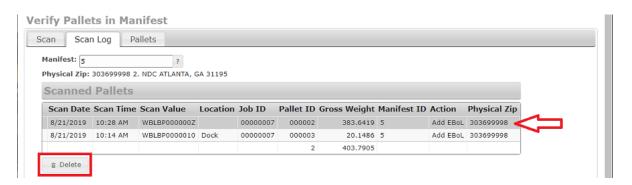


If the selected manifest contains stops, the user will have to select the stop on the 'Scan' tab to be able to view the scanned pallets for it in the 'Scan Log' tab.

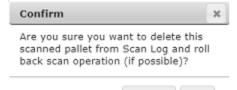


Deleting A Verified Pallet From A Manifest

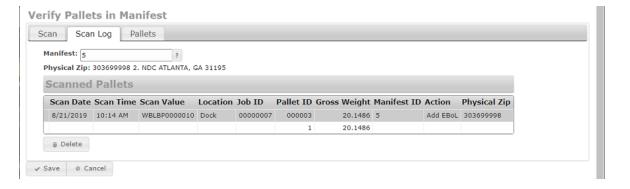
To delete a pallet that was previously verified (i.e. scanned) as being part of a manifest, select/highlight the manifest in the list and click the **Delete** button.



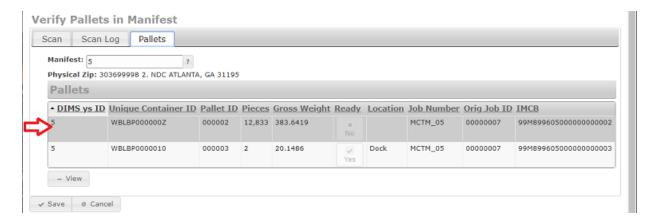
A Confirm dialog will display. Click the **Delete** button to close the dialog and continue with the deletion (clicking the No button will close the dialog and abort the deletion process).



The Scan Log will update, and the deleted pallet will no longer be displayed.

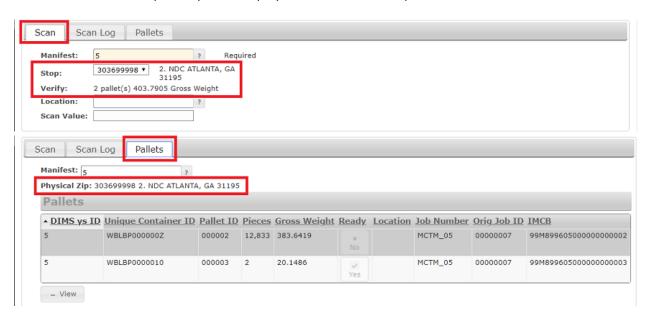


The deleted pallet will remain assigned to the manifest and therefore still be included in the manifest's pallet list.



VERIFY PALLETS IN MANIFEST 'PALLETS' TAB

The 'Pallets' tab displays the pallets that are associated with the selected manifest. If a manifest is for a trailer that contains stops, the pallets displayed will be for the stop selected within the 'Scan' tab.

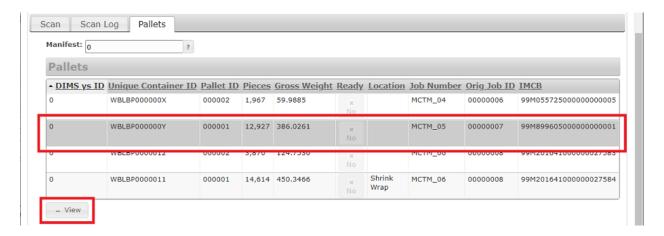


The following information is provided for each pallet in the list:

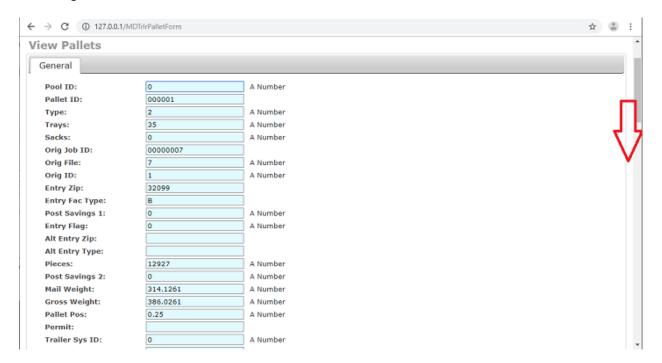
- Manifest ID (formerly DIMS ys ID): The manifest number or ID. If using Multi-Carrier Trailer Manifesting, this ID also corresponds with the same Manifest ID in DAT-MAIL;
- **Unique Container ID:** The unique value associated with the pallet. This same ID is also present in DAT-MAIL;
- Pallet ID: The Pallet ID corresponds to the Mother Pallet ID in DAT-MAIL;
- Location: Location assigned at time of scan;

- Job Number: The job number assigned to the job upon import to DAT-MAIL;
- Orig Job ID: The job ID that was assigned to the job upon import to DAT-MAIL; and
- **IMCB:** Intelligent Mail Container Barcode. A value applied to mailer-generated container labels used for scanning to uniquely identify pallets. This value will correspond with the same field found in DAT-MAIL for the same job.

Highlighting a pallet (i.e. line item) and clicking the **-View** button will display all of the pallet-specific detail information.



For documentation purposes (i.e. size constraints), the entire field list is not displayed in the image below.



VERIFY PALLETS IN MANIFEST 'SCAN2PAY' TAB

This tab is only enabled/displayed if the Verify Pallets in Manifest action is enabled as a trigger for the Scan2Pay function. Refer to Scan2Pay Settings for more information.



Scan2Pay is a wbSCAN feature that allows mailers to scan pallets as they are produced and let the shop floor staff either mark the pallet for payment or actually pay postage for the scanned pallets in *PostalOne!* For more information on Scan2Pay and how it works, refer to <u>SCAN2PAY</u> in the "Additional Feature Information" section of is Guide.

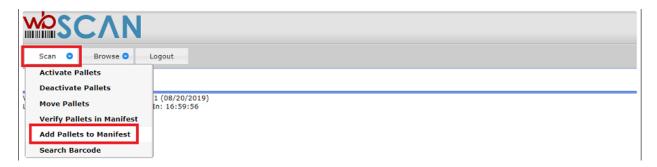
Add Pallets to Manifest

Adding pallets to a manifest is a function that users who prefer to create their trailer manifests by scanning pallets onto a trailer can use.



For DIME users, the 'Add Pallets to Manifest' process will automatically create DIME orders for the scanned pallets and associate them to the manifest that was selected. It will take about 10 minutes for this information to reach LSC's eBOL, however.

To add pallets to a manifest, click the **Scan** button, and then select the 'Add Pallets to Manifest' option.



The Add Pallets to Manifest page will display. The page contains three tab options: 'Scan'; 'Scan Log'; and 'Pallets'. The 'Scan' tab is used to add individual pallets to a selected manifest, the 'Scan Log' tab displays the list of pallets that the user has scanned, and the 'Pallets' tab displays both a list of available pallets; as well as, a list of pallets that has already been associated with the selected manifest (i.e. added to eBOL). In addition, a fourth 'Scan2Pay' tab may display. More information about each tab is provided below.

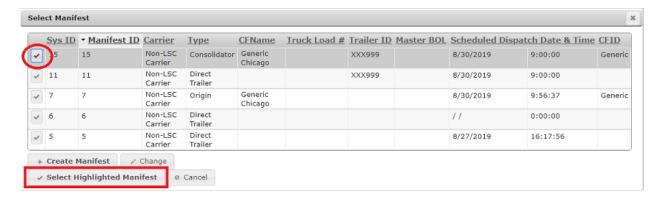


ADD PALLETS TO MANIFEST 'SCAN' TAB

Select a manifest (required). To display the list of existing manifests, click the question mark located to the right of the 'Manifest' field.



The *Select Manifest* page will display listing all the existing manifests. Select/highlight the desired manifest and then click the **Select Highlighted Manifest** button, or simply click the checkmark that displays immediately to the let of the Manifest ID.



Component Description & Use

When a manifest is selected, the user will automatically be re-directed back to the 'Scan' tab screen and the manifest ID will be populated in the 'Manifest' field. If the selected pallet already has pallets associated with it, the number of pallets and the gross weight of the pallets will also display.

If the user wants to associate the pallet to be scanned to a location or production function (optional), highlight the 'Location' field and enter, scan or select a location from the list of existing locations by clicking the question mark immediately to the right of the 'Location' field.



For more information on Locations, refer to Locations in this Guide.



Scan the barcode of the pallet that is to be added to the manifest and click the **Save** button (if necessary - the barcode reader being used may be set up to append a "Return" at the end of the barcode so that clicking the **Save** button is not necessary).

If the pallet is added to the manifest successfully, a confirmation message will display on the screen. In addition, the pallet count and total gross weight will display to the right of the 'Totals' field. As pallets are added to the manifest, the pallet count and total gross weight will increase accordingly. If the manifest already had pallets associated with it, the newly scanned pallet(s) and gross weight will be added to the existing values. This includes any pallets added to the manifest through DAT-MAIL, as well (Multi-Carrier Trailer Manifesting users).



If the manifest was created with maximum limit values specified for the manifest weight and/or pallet count, and a scan exceeds either of those values, a warning message will display.



For more information about Max Pallets and Max Weight settings for manifests, refer to <u>CREATE</u> A <u>MANIFEST</u> in this Guide.



At this point, users can do one of three things:

- Reject the scan by clicking the **Cancel** button;
- Ignore the warning for this one scan by clicking the Save Anyway button. The warning will
 continue to display for future scans if the maximum value(s) is once again exceeded; or
- Ignore the warning for this one scan by clicking the **Save Anyway** button and disable the warning message for future scans. To do this, set the 'Allow Exceeds' toggle switch to 'Yes'. The system will ignore the max value(s) set within the manifest.

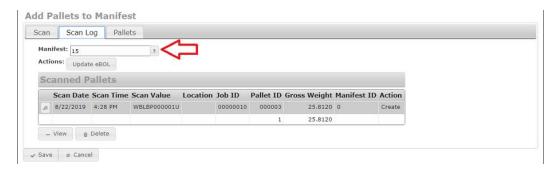


Mailers should <u>not</u> exceed the pallet count or gross weight that LSC Logistics has given them!

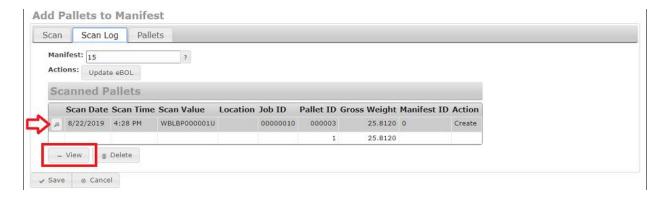
Pallets will not be associated with the selected manifest until the pallet is selected in the 'Scan Log' tab and the **Update eBOL** button is clicked. Refer to <u>ADD PALLETS TO MANIFEST 'SCAN LOG' TAB</u> for more information.

ADD PALLETS TO MANIFEST 'SCAN LOG' TAB

The 'Scan Log' tab displays all of the pallets that have been scanned for adding to a selected manifest. Scanning, in essence, creates an order. If a manifest was selected on the 'Scan' tab, it will automatically be selected, and the pallets displayed for it in the 'Scan Log' as well. To select a different manifest, click the 'Manifest' field's corresponding question mark.

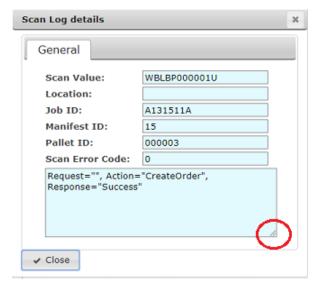


The details of a particular scan can be viewed by selecting/highlighting the scan's line item and clicking the **View** button or clicking the view icon located to the left of the 'Scan Date'.

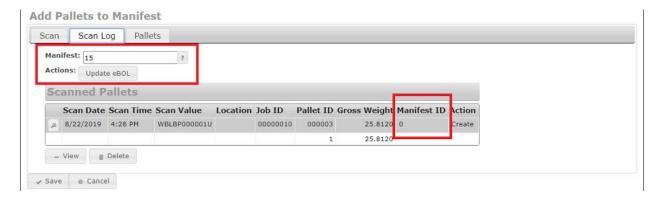


The *Scan Log* details screen will display. Information provided for the selected scan is the 'Scan Value'; 'Location' (if assigned); 'Job ID'; 'Manifest ID'; 'Pallet ID'; 'Scan Error Code' (if one exists); and a log of the various scan-specific actions that were performed by the system. The log window can be resized if necessary/preferred by clicking and dragging the bottom right corner.

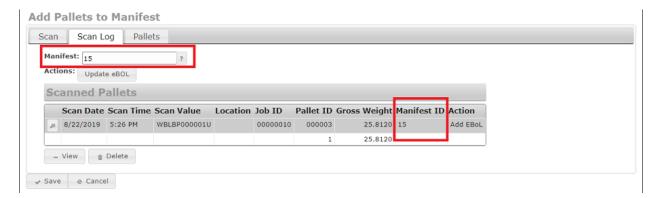
Click the **Close** button to close the screen and return to the 'Scan Log' screen.



Until the user selects each pallet scanned and clicks the **Update eBOL** button, the pallet(s) will not be associated with the manifest in the system. Note that the 'Manifest ID' field in the screen image below does not contain the selected manifest's manifest number. This is a giveaway that the **Update eBOL** button has not been clicked for that particular scan (i.e. pallet).



When the **Update eBOL** button is clicked, the screen will update and the 'Manifest ID' field will show the selected Manifest number. The scanned pallet will now be associated with the selected manifest throughout the system (e.g. Browse > Scan Log, Verify Pallets on Manifest, etc.).



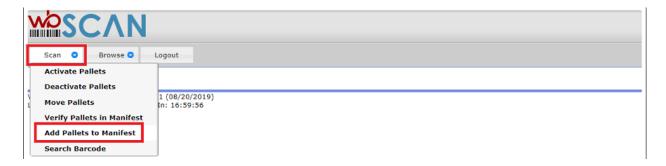


DIME users can have the eBOL updated automatically when adding pallets to a manifest, omitting the need to manually click the UPDATE EBOL button for each scan. The setting to enable this is located in DAT-MAIL. Refer to the <u>wbSCAN Installation Guide</u> for instructions.

Deleting Pallets From A Manifest

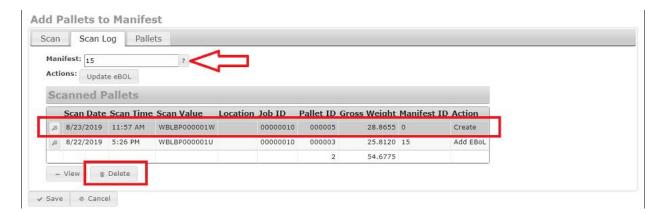
If a pallet is scanned to a manifest erroneously, it can be removed from the manifest even if the pallet was already associated with the manifest.

In wbSCAN, click the **Scan** button and select the 'Add Pallets to Manifest' option.

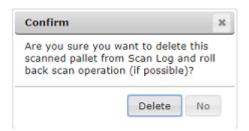


Within the *Add Pallets to Manifest* screen, click the 'Scan Log' tab. Click the 'Manifest' field's corresponding question mark button to display the list of available manifests. Select the desired manifest. Back in the *Scan Log* screen, the pallets associated with the selected manifest will display. If the pallet was already added to the eBOL, the "Manifest ID" field will be populated with a number that matches the value populated in the 'Manifest' field.

Select/highlight the pallet to be removed and click the **Delete** button.



A *Confirm* dialog will display. Click the **Delete** button to close the dialog and continue with the deletion (clicking the **No** button closes the dialog and aborts the deletion process).

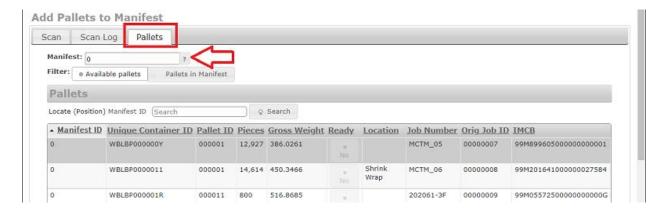


- For DIME users, deletions are sent to LSC and removed from the eBOL there; however, this will take a few extra minutes.
- For DIME users, if the feature to associate the pallet to the manifest is not present when the pallet is scanned, the pallet will be removed from the list immediately, and the deletion will not be communicated to LSC when the UPDATE EBOL button is clicked.

ADD PALLETS TO MANIFEST 'PALLETS' TAB

The 'Pallets' tab within the *Add Pallets to Manifest* screen displays all of the available pallets in the system and, if a manifest has been selected, the pallets that have already been added to the selected manifest (i.e. added to eBOL). If a manifest has not been selected, only the available pallets in the system will display.

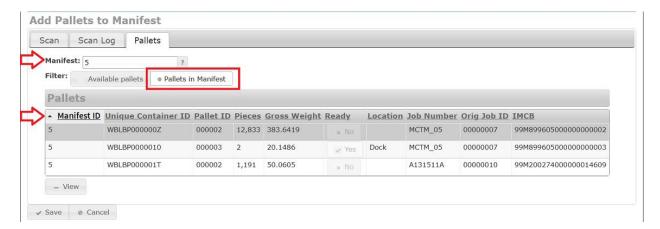
To select a manifest, click the 'Manifest' field's corresponding question mark button.



A list of the available manifests will display. Select the desired manifest to be active in the 'Pallets' tab. Once the manifest is selected, click the Pallets in Manifest button to display the pallets that have been associated with it (i.e. added to eBOL).



Pallets that have been added to a manifest will only be associated with that manifest (i.e. show up in the 'Pallets' tab) when the pallet is selected in the 'Scan Log' and the ADD TO EBOL button is clicked (refer to ADD PALLETS TO MANIFEST 'SCAN LOG' TAB for more information).



If no pallets have been associated with the manifest, no pallets will display.



The following information is provided for each pallet in the list:

- Manifest ID (formerly DIMS ys ID): The manifest number or ID. If using Multi-Carrier Trailer Manifesting, this ID also corresponds with the same Manifest ID in DAT-MAIL;
- **Unique Container ID:** The unique value associated with the pallet. This same ID is also present in DAT-MAIL;
- Pallet ID: The Pallet ID corresponds to the Mother Pallet ID in DAT-MAIL;
- Pieces: The total number of pieces on the pallet;
- Gross Weight: The gross weight of the pallet;
- Ready: This field displays whether or not a pallet is ready to ship (i.e. Yes or No);
- Location: The Location assigned at time of scan;
- Job Number: The job number assigned to the job upon import to DAT-MAIL;
- Orig Job ID: The job ID that was assigned to the job upon import to DAT-MAIL; and
- **IMCB:** The Intelligent Mail Container Barcode. A value applied to mailer-generated container labels used for scanning to uniquely identify pallets. This value will correspond with the same field found in DAT-MAIL for the same job.

Highlighting a pallet (i.e. line item) and clicking the **-View** button will display all of the pallet-specific detail information. Refer to <u>VERIFY PALLETS IN MANIFEST 'PALLETS' TAB</u> for a screen image of the screen containing the pallet details.

ADD PALLETS TO MANIFEST 'SCAN2PAY' TAB

This tab is only enabled/displayed if the Add Pallets to Manifest action is enabled as a trigger for the Scan2Pay function. Refer to Scan2Pay Settings for more information.



Scan2Pay is a wbSCAN feature that allows mailers to scan pallets as they are produced and let the shop floor staff either mark the pallet for payment or actually pay postage for the scanned pallets in *PostalOne!* For more information on Scan2Pay and how it works, refer to <u>SCAN2PAY</u> in the "Additional Feature Information" section of is Guide.

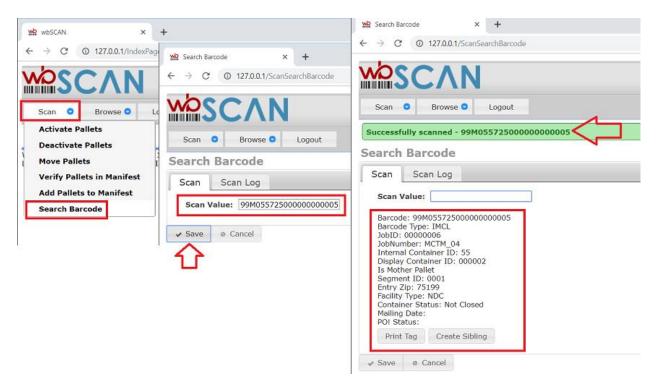
Search Barcode

This function replicates DAT-MAIL's existing "Search for Barcodes" function. It allows users to find information from IM piece, tray, and pallet barcode scans from within wbSCAN.



The Search Barcode function is available in wbSCAN "Essentials" - a "lite" or unregistered version of wbSCAN that is available to all DAT-MAIL users running DAT-MAIL version 21.19.09.17 and newer. Refer to <u>UNREGISTERED USERS</u> for more information.

To access this feature, click the main 'Scan' menu in wbSCAN and select the 'Search Barcode' option. Manually enter or cut/paste the desired barcode into the 'Scan Value' field or scan the desired barcode using a hand-held scanner and click the **Save** button (if necessary). As long as the barcode exists in the database, the system will return the details associated with that barcode (see image).



From the results screen, users can also print tray tags for the barcode and/or create siblings.

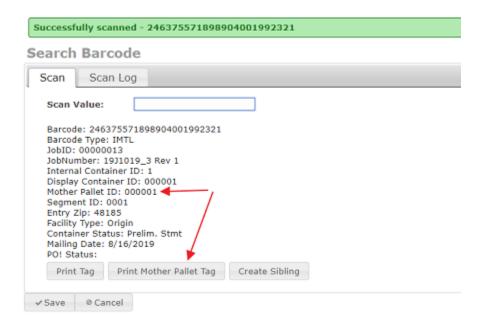
SEARCH BARCODE > PRINT TAGS & CREATING SIBLINGS

These functions operate the same as the corresponding functions in DAT-MAIL. When a barcode is successfully scanned, users can print a tray tag by clicking the **Print Tag** button. This is true even if the scanned pallet is a mother pallet.

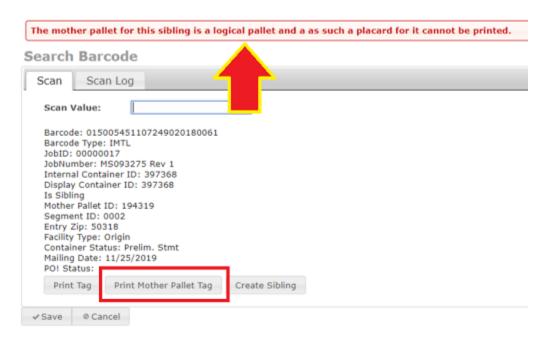


In addition, users can also create a sibling tag by clicking the **Create Sibling** button.

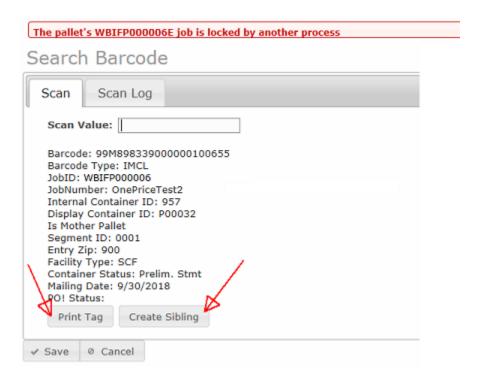
if the scanned barcode *contains* a mother pallet, users have the option to **Print Mother Pallet Tag** by clicking the corresponding button. The button will only be displayed if a mother pallet exists.



If the system determines that the mother pallet is a logical pallet, when the Print Mother Pallet Tag button is clicked, an error message will display, and the tag will not be printed. If a mother pallet is also a logical pallet, pallet tags cannot be printed for it.



If the job associated with the scanned barcode is locked in DAT-MAIL for whatever reason, and the **Print Tag** or **Create Sibling** buttons are clicked, an error message will display accordingly and not allow the print or creation to take place. The associated job must be unlocked in DAT-MAIL to be able to print tags or create siblings.



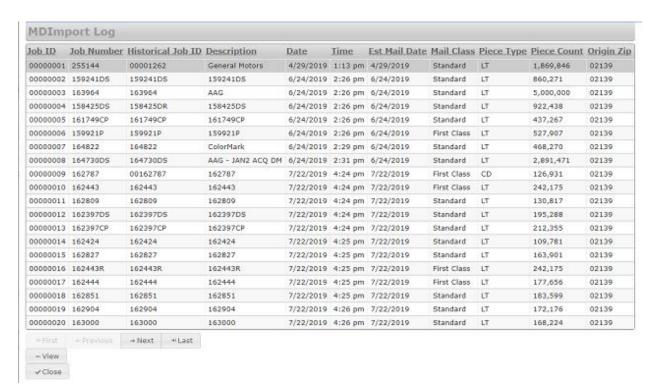
BROWSE BUTTON

When clicked, the Browse button expands to display further options related to wbSCAN.

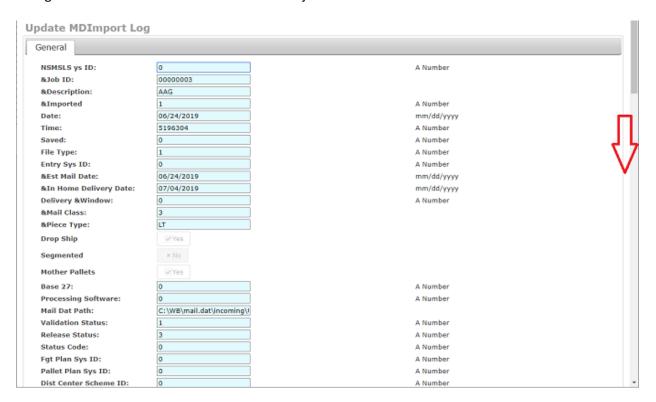


MD Import Log

When selected from wbSCAN's 'Browse' menu, the 'MD Import Log' option displays the list of palletized Mail.dats that exist in DAT-MAIL.



When a particular job in the list is selected (i.e. highlighted) and the **-View** button is clicked, the display changes and to show the details of the selected job.



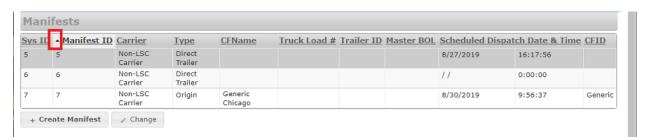
To return to the MDImport Log job list, scroll to the bottom of the screen and click the **Close** button.

Manifests



Selecting the 'Manifests' option when the **Browse** button is clicked, displays a list of existing manifests.

For Multi-Carrier Trailer Manifesting users, any manifests created in DAT-MAIL will also display in the *Manifests* list in wbSCAN.



The data in the *Manifests* screen can be sorted in ascending or descending order by column for ease-of-use. In the image above, the data is sorted by 'Manifest ID' in descending order (note the 'carrot' next to the column label and the column header is shaded a lighter color than the rest). Click on any column header to sort the data accordingly.

CREATE A MANIFEST

To create a manifest, on the *Manifests* screen, click the **Create Manifest** button. The *Update Manifests* screen will display.



The *Update Manifests* screen contains the following default fields for creating a manifest:

- Manifest ID: This unique number is used as an identifier for the manifest. It is automatically assigned by the system and cannot be changed by the user;
- **Dispatch Date**: The date the mailer has scheduled the trailer be sent to them by the carrier. Click the field's corresponding question mark to select a date;
- Dispatch Time: The time the mailer has scheduled the trailer be sent to them by the carrier. The
 date auto-populates using the time the manifest is being created. Click anywhere in the field to
 change the time;
- **Trailer ID**: The identifer of the trailer that is to be sent to the mailer by the carrier. This information is only provided (i.e. auto-populated) if the user is communicating electronically with the carrier (e.g. DIME users). The mailer can; however, manually type in a value or identifyer if one is provided by their carrier;

Carrier: The name of the logistics company picking up the load or shipment. Carrier information
must be pre-populated in DAT-MAIL prior to creating a manifest (refer to <u>REQUIREMENTS</u> for
more information). Use the field's corresponding question mark to launch the *Carrier* screen.
The carriers populated in DAT-MAIL's *Carrier List* will display on the screen. Select/highlight a
carrier in the list and click the **Select** button or click the desired carrier's corresponding checkmark to select it;



- Manifest Type: Used to specify the type of shipment that is to be associated with the manifest.
 The options are: 'Consolidator'; 'LTL'; 'Commingle'; 'Direct Trailer; and 'Origin'. Depending on
 the option selected, the screen will update to display additional fields necessary for creating the
 manifest, or modify the screen to disable any of the existing fields that are no longer necessary.
 - Consolidator: Requires default fields only. No additional fields display, and no existing default fields are disabled;
 - ~ LTL: Default 'Facility ID' field is disabled. No additional fields display;
 - Commingle: Requires default fields only. No additional fields display, and no existing default fields are disabled;
 - Direct Trailer: Default 'Facility ID' field is disabled. Screen is updated to display an Add New Stop button to be able to add required stop information (refer to <u>Stops For Direct Trailers</u> for more information); and
 - ~ **Origin**: Requires default fields only. No additional fields display, and no existing default fields are disabled.
- Facility ID: The name or identifier of the default facility associated with the selected logistics company or carrier picking up the shipment. Carrier facility information must be pre-populated in DAT-MAIL prior to creating a manifest (refer to <u>REQUIREMENTS</u> for more information). Use the field's corresponding question mark to launch the *Facility ID* screen. The carriers populated in DAT-MAIL's *Distribution Center List* will display on the screen. Select/highlight a facility in the list and click the Select button or click the desired Facility's corresponding check-mark to select it;



Max Weight: A maximum weight for the trailer can be entered. As pallets are added to a
manifest/trailer, if the total weight of the trailer exceeds the Max Weight entered here, a
warning will display; and

 Max Pallets: A maximum pallet count can be entered. If too many pallets are added to a manifest/trailer, a warning will display.



The warning message that displays if the pallets scanned exceeds the Max Weight or the Max Pallets values is the same.



Users can override the warning when adding pallets to a manifest by clicking the **Save Anyway** button and/or setting the 'Allow Exceeds' toggle switch to 'Yes'. Refer to <u>ADD PALLETS TO MANIFEST 'SCAN' TAB</u> for more information.

Stops For Direct Trailers

Stops are associated with a Manifest Type of 'Direct Trailer' only. Facility data that is required for creating stops is provided through the Automation Scheduler's Auto Postal Updates plug-in; therefore, the installation of these two software components must occur before attempting to create Stops. Refer to <u>REQUIREMENTS</u> for more information.



The information provided pertaining to Stops assumes that the Automation Scheduler with Auto Postal Updates plug-in has been installed, registered, setup, and the software's service started.

Creating Stops

When <u>creating or editing a manifest</u> that has a 'Manifest Type' of 'Direct Trailers', click the **Add New Stop** button to add a Stop. The *Add Stop* screen will display:



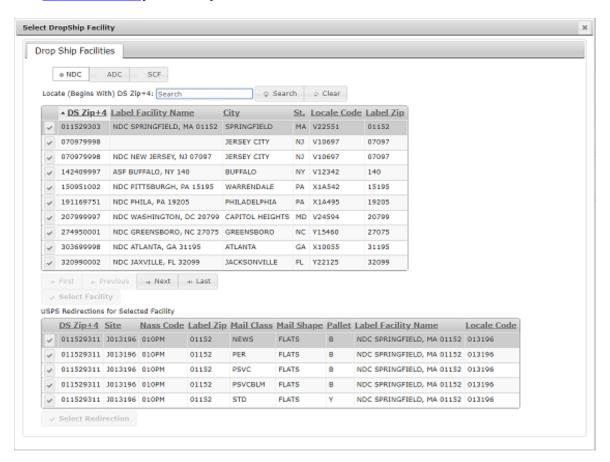
Stop Number: Stop Numbers are are system-generated. The lower the Stop Number, the sooner
it will occur during the delivery and/or unloading process. Therefore, the lower the Stop
Number, the closer the pallets should be loaded to the trailer door. Once Stops are created, the

order in which they occur can be changed by the mailer if necessary (refer to Changing Stop
Order for more information);

• **Physical Zip**: Specify the physical zip code associated with the stop. Users select the zip code using the same facility data DAT-MAIL uses. Clicking the field's corresponding question mark displays the *Select DropShip Facility* screen.



If no drop ship facility data displays, the Automation Scheduler with Auto Postal Updates plug-in has not been installed, registered, setup, and/or the software service run. Refer to REQUIREMENTS for more information.



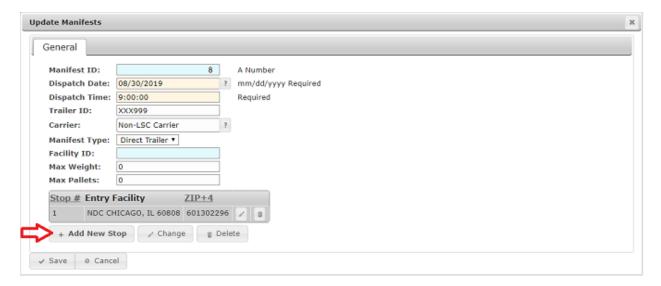
Select whether the facility should be an 'NDC', an 'ADC', or an 'SCF'. The corresponding data can be sorted by clicking the column header (data will be sorted in ascending or descending order). A specific facility can be searched for by entering the beginning of the 'DS Zip+4' (e.g. "6" for facilities that have a ZIP+4® that begins with a "6"). Users can also navigate through pages by using the **Next** and **Last** buttons.

Once the desired ZIP+4 is identified, select/highlight it (or it's redirection) in the list and click the **Select Facility** button or click the line item's corresponding checkmark;



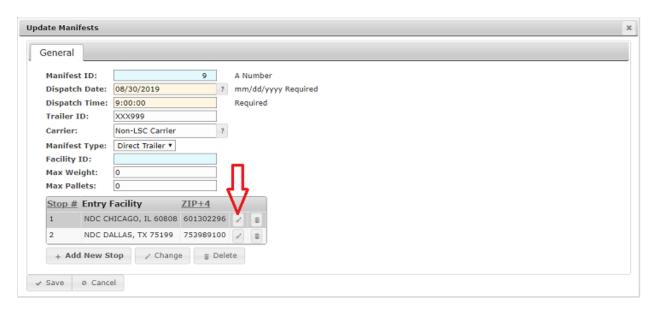
- **Entry Facility**: This is the name of the facility that corresponds with the 'Physical Zip' field. The field auto-populates with the Physical Zip is selected;
- **Facility Type**: This identifies the type of 'Entry Facility' that was selected (i.e. NDC, ADC, or SCF). The field auto-populates based on what is selected when the Physical Zip is selected; and
- Locale Key: This field is auto-populated based on the Locale Key of the Entry Facility selected.

When all of the stop fields are satisfied, click the **Save** button to add the stop to the manifest. Repeat the add stop process for all stops that should be associated with the manifest.



Editing Stop Information

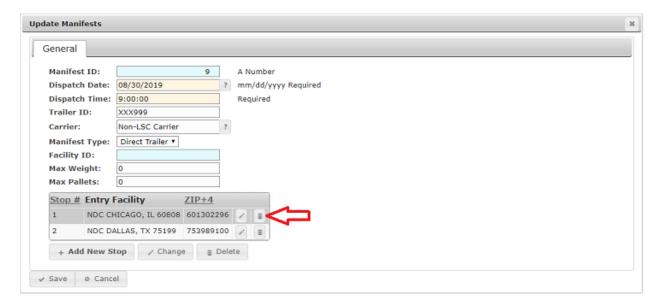
Stop information can be modified by clicking the Stop's corresponding edit button () or by selecting/highlighting the Stop's line item and clicking the **Change** button.



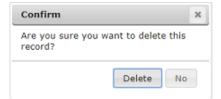
A screen that shows the details of the selected Stop will display. Make the necessary updates and click the **Save** button.

Deleting Stops

Stops can be deleted by clicking the Stop's corresponding delete button () or by selecting/highlighting the Stop's line item and clicking the **Delete** button.

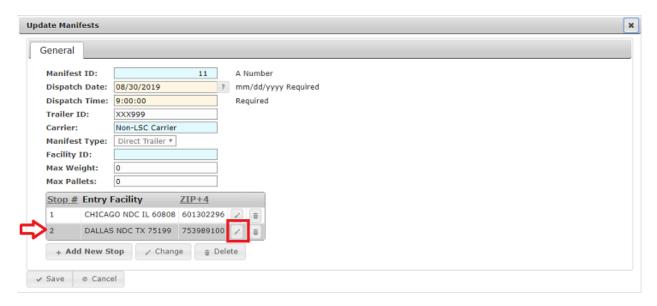


A *Confirm* dialog will display. Click the **Delete** button to close the dialog and continue with the deletion of the Stop (clicking the **No** button will close the dialog button and abort the delete process).



Changing Stop Order

If a manifest contains multiple Stops, the order the Stops occur in can be changed in wbSCAN. Open the manifest and click the edit button () of the Stop that needs to be changed.



A screen containing the details of the selected Stop will display. Use the up/down arrows to change the 'Stop Number' (e.g. in the screen image below, the Stop Number was changed from 2 to 1). Click the **Save** button when finished.



Scan Log

When the 'Scan Log' option is selected form the 'Browse' menu, a *Scanned Pallets* screen displays. This screen provides a list of all pallets that were scanned, for whatever reason. It also provides the details around the Scan Value. For instance, 'Scan Date' and 'Time'; 'Location' when the scan took place; the associated 'Job' and 'Pallet' IDs; the 'Gross Weight' of the pallet; the associated 'Manifest ID' (if any); the 'Action' that was taken when the pallet was scanned (if any); and the errors that occurred.

Scan Date Scan Time	Scan Value	Location	Job ID	Pallet ID	Gross Weight	Manifest ID	Action	Erro
12/18/2019 11:28 AM	331002451901490537265978				0.0000	0		
12/18/2019 11:28 AM	99M000984000000000032				0.0000	0		
12/18/2019 11:27 AM	00,343,898654,009196326,60404				0.0000	0		
12/18/2019 11:27 AM	99M000984000000000032				0.0000	0		
12/18/2019 10:43 AM	99M000984000000000032				0.0000	0		
12/09/2019 4:47 PM	00,343,898654,009196326,60404	Wrapper			0.0000	0		
12/09/2019 4:46 PM	0,343,898654,009196326,60404	Wrapper			0.0000	0		
12/09/2019 4:45 PM	00,343,898654,009196326,60404	Wrapper			0.0000	0		
12/09/2019 4:44 PM	00,343,898654,009196326,60404	Wrapper			0.0000	0		
12/09/2019 4:43 PM	99M000984000000000000	Wrapper	00000068	000011	1,544.4025	0	Edit	
12/09/2019 4:43 PM	99M000984000000000000	Wrapper	00000068	000011	1,544.4025	0	Edit	
12/09/2019 4:38 PM	0034389865400919632660404	1A-1			0.0000	0		
12/09/2019 4:38 PM	99M000984000000000032	1A-1			0.0000	0		
12/09/2019 4:37 PM	710372411000984000020671	1A-1			0.0000	0		
12/09/2019 4:34 PM	99M000984000000000032	1A-1	00000068	000013	1,489.5795	0	Edit	
12/09/2019 4:32 PM	99M000984000000000032	1A-1	00000068	000013	1,489.5795	0	Edit	
12/09/2019 4:32 PM	99M000984000000000032	1A-1	00000068	000013	1,489.5795	0	Edit	
12/09/2019 4:32 PM	99M000984000000000032	1A-1	00000068	000013	1,489.5795	0	Edit	
12/03/2019 3:48 PM	99M9014905370000002ZC	1A-1	00000070	000009	47.5040	14	Add EBot	4
12/03/2019 3:46 PM	99M9014905370000002ZC	1A-1	00000070	000009	47.5040	0	Add EBol	
12/03/2019 3:46 PM	99M9014905370000002ZD	1A-1	00000070	000010	51.5940	0	Edit	
12/03/2019 2:37 PM	99M9014905370000002NR				0.0000	0		
11/20/2019 4:39 PM	331002451901490537265978				0.0000	0		
11/20/2019 4:39 PM	331002451901490537265978				0.0000	0		
11/20/2019 4:38 PM	1				0.0000	0		
11/05/2019 3:29 PM	99M9014905370000002MB				0.0000	0		

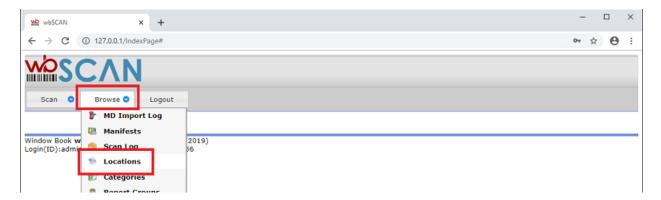
Locations and Categories

Locations are intended to allow Mailers to track pallets throughout the production process. Locations can be a physical area like a rack area or shop floor staging area, or even something like a printing function. Each time a pallet is moved or something significant is performed on that pallet, the pallet can be scanned and assigned to a Location to be able to track its' location and/or status during the production process. For example, a Mailer may have 1,000 different location codes representing different shelf locations in the warehouse.

In addition, each location is assigned to a Category by the Mailer. Categories make it easy to organize a Mailer's scan data. This is especially useful when utilizing wbSCAN's production dashboard. The dashboard provides pallet statistics for jobs that have had recent scan activity. For the Mailer who has

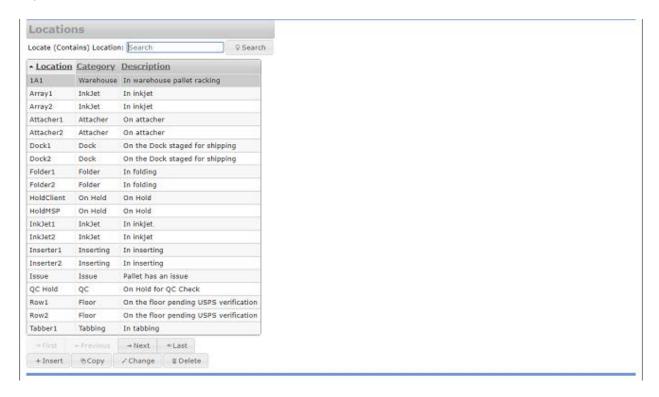
1,000 different location codes representing different shelf locations in the warehouse, those locations could be assigned to a Category called "Warehouse".

Locations are accessed and managed by selecting the main 'Browse' menu and selecting the 'Locations' option.



wbSCAN provides a list of pre-defined Locations that are already assigned to a default list of Categories. In addition, a Description is also provided for these pre-defined values.

New Locations can be added (i.e. **Insert** button), existing Locations **Changed** or **Deleted** from the system by selecting the corresponding button, and for ease-of-use purposes, an existing Location can be copied (i.e. **Copy** button). When a Location is copied, both the Location and the associated Category are copied.



Clicking the **Cancel** button will cancel the function and return the Mailer to the previous screen.

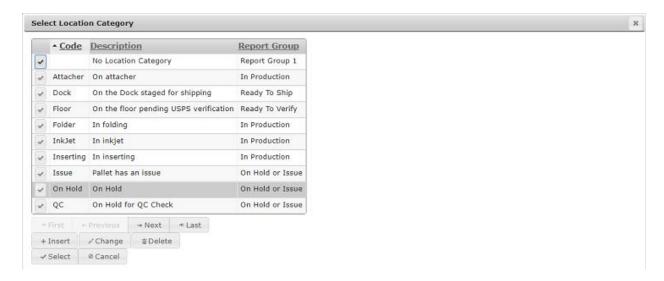


Locations can also be managed from any of the options listed under the 'Scan' menu. Refer to the information provided under <u>ACTIVATE 'SCAN' TAB</u> as an example. If a new Location is added or scanned, the user will be prompted to save it. The prompt will display only once. Future versions of wbSCAN will have a way of printing barcoded labels for selected locations which you can use as labels for staging areas, racks or for production functions you are tracking. In the meantime, any barcode printing utility could also create these labels. Use CODE39 or GSS/128 topologies since these can accommodate alpha or numeric values and don't have the restrictions of other topologies.

When a new Location is added (i.e. the **Insert** button is clicked), the Mailer needs to enter a name for the new Location. A default Category is automatically assigned for the new Location; however, the Mailer can decide to assign a different Category by displaying the list of available options (i.e. click the field's corresponding question mark).



When the *Location Category* screen is displayed, the Mailer can **Select** the desired Category to assign the new Location to. They also have the option to add a new Category for selection (i.e. **Insert** button), **Change** or edit an existing Category, or **Delete** an existing Category.



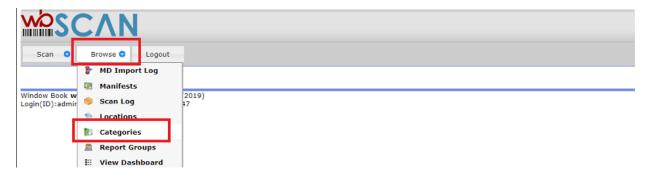
Clicking the Cancel button will cancel the function and return the Mailer to the previous screen.

Clicking the **Insert** button displays a blank Category screen. The user must enter/select values for the following three fields:

- Code: A very brief description (e.g. one to two short words or abbreviations) that could serve as a column header on a report;
- Description: The full description of the Category being added/created; and
- Report Group or Function: This is a label for a specific production function that multiple Category 'Codes' could be tied to.



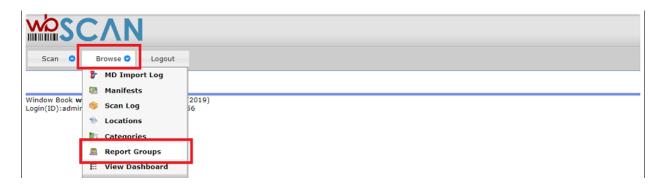
This same screen for managing Categories is directly accessible from the 'Browse' > 'Categories' menu option.



Report Groups

Report Groups – also sometimes referred to as Function or Function Codes – are used for grouping Categories on the Production Dashboard and for Reporting. To clarify, there may be many Locations tied to a single Category and there can be multiple Categories assigned to a single Report Group or Function. A Report Group is an aggregate of a number of <u>Categories</u> or production functions.

To manage Report Groups, select the 'Report Groups' option from the 'Browse' menu.



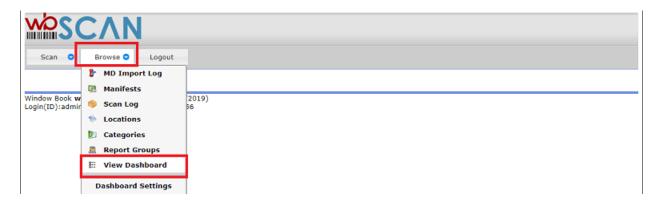
As with Locations and Categories, a list of pre-defined Report Groups is provided for wbSCAN users. Report Groups can be added (i.e. **Insert** button), an existing Report Group edited or revised (i.e. **Change** button) or deleted by selecting a Report Group and clicking the corresponding button.



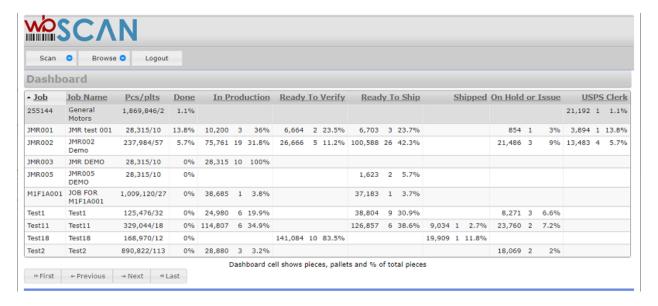
Report Groups are assigned to Categories when Categories are created or changed (refer to <u>Locations and Categories</u> for more information). Report Groups are selected for reporting and viewing on the <u>Dashboard Settings</u> menu.

View Dashboard

wbSCAN's Dashboard allows Mailers to monitor the production status of their active jobs. The Dashboard is accessible from the 'View Dashboard' option in the 'Browse' menu.



The Dashboard displays the number of pallets and pieces (and a piece total percentage) for different production functions associated with the scans being made in wbSCAN. It also allows Mailers to define what production functional signals that they are "done" with a job. What data and the amount of data displayed on the Dashboard is defined by the Client in the <u>Dashboard Settings</u> screen.



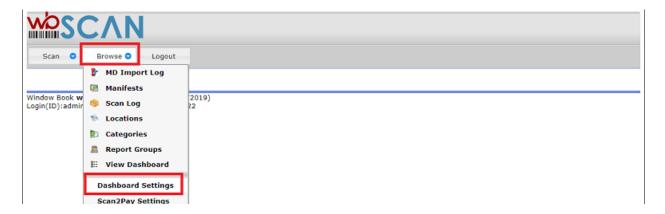
The first four columns that display on the Dashboard are static. They are:

- Job: This column is populated using the Job Number or Historical Job ID as assigned in DAT-MAIL;
- Job Name: The name of the job that appears in DAT-MAIL;
- Pcs/plts: This is the numberr of Pieces and Pallets) associated with the job; and
- Done: This is a calculated percentage relating to the status of the job being finalized or finished.
 What constitutes a job being "done" is defined by the Client in the <u>Dashboard Settings</u> screen.
 Clients can also decide whether this column is displayed on their Dashboard.

Each of the remaining columns that display (up to eight total) is a <u>Report Group</u>, which is an aggregate of a number of <u>Categories</u> or production functions. Which Report Groups display on the Dashboard are dependent on the Client and what they specify in the <u>Dashboard Settings</u> screen.

Dashboard Settings

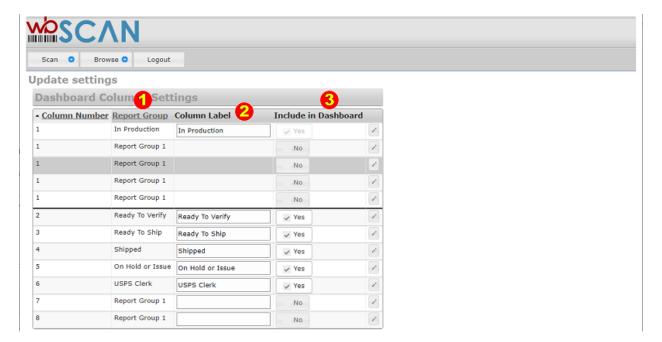
Accessing the *Dashboard Settings* screen is performed by selecting the 'Dashboard Settings' option from the 'Browse' menu.



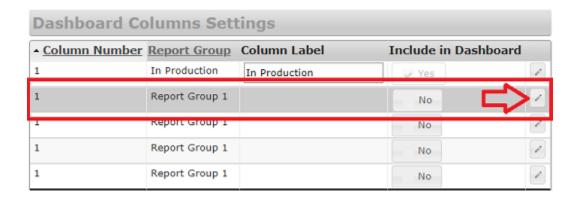
The default or pre-defined Report Groups are listed for each one of the eight available columns (columns are numbered 1-8).

A corresponding Column Label representing the Report Group must be entered for each column that is to display on the Dashboard. The name of the Report Group can be used (see screen image below).

Whether a Report Group displays as a column on the Dashboard is controlled by the Yes/No button 6.



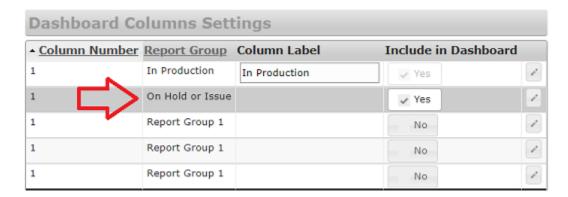
The first column (i.e. column 1), can be reported as an aggregate of up to five Report Groups. To enable the data from a Report Group to be included in column 1, highlight the line item by single-clicking on it, and then click the edit button.



An *Update* screen will display. Select the Report Group to be included in column 1 and change the 'Include' button from NO to YES. The existing Column Label cannot be changed here (to change the Column Label, edit the line item where the Column Label was entered by the user). When ready, click the **Save** button.



The screen will close, and the *Dashboard Columns Settings* will update accordingly. With the example being used here, column 1 of the Dashboard will be labeled "In Production" and will be an aggregate of data from both the "In Production" and "On Hold or Issue" Report Groups.



Columns can be edited by highlighting the line item (i.e. single click on it) and clicking the corresponding edit button or clicking the **Change** button **4**.

If the Client wishes to have a "Done" column included on their Dashboard, set the corresponding to read YES 5.

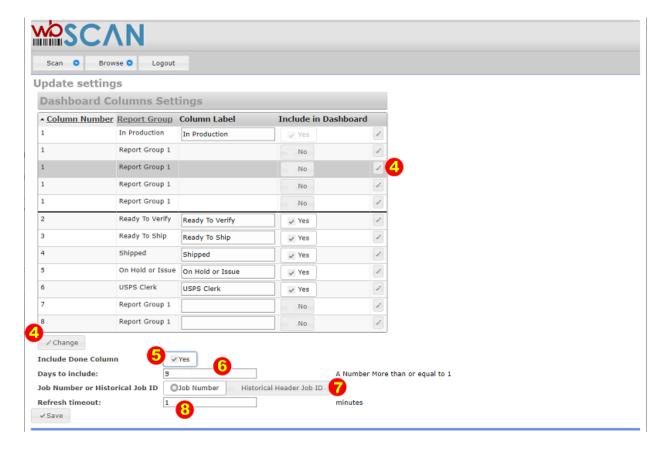
Enter the number of days that data should be reported for on the Dashboard 6. The default is 5.

Select whether the 'Job' column should display the Job Number from DAT-MAIL or the Historical Job ID

And, if necessary, change the default 'Refresh timeout'

1. The default is 1 minute.

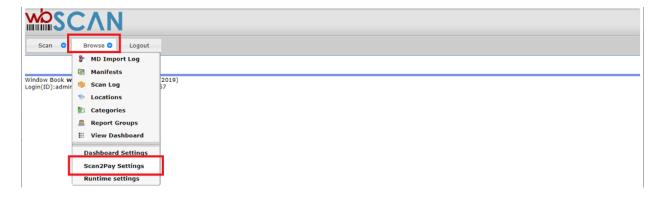
Any time changes are made to the Dashboard Settings screen, make sure to click the **Save** button when finished.



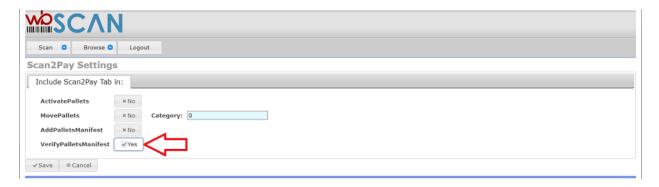
Scan2Pay Settings

In earlier versions of wbSCAN, the Scan2Pay function was triggered when pallets were <u>Activated</u>. This has changed; however. Scan2Pay can be triggered when up to four functions are performed as long as

the function(s) is enabled in the *Scan2Pay Settings* screen. This screen is accessible by selecting the 'Scan2Pay Settings' option from the 'Browse' menu.



To enable the Scan2Pay function to be triggered when a specific event occurs, set the event's corresponding button to YES in the Scan2Pay Settings screen.



Referencing the screen image above, the Scan2Pay function will be triggered every time a <u>Verify Pallets</u> in <u>Manifest</u> scan is performed.

If the 'Move Pallets' option is enabled, the trigger for Scan2Pay can be further restricted to a specific a certain Category, by selecting a Category Code from the list.

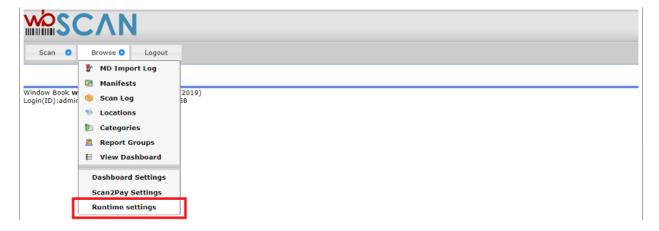


a

For more information about the Scan2Pay function, refer to <u>SCAN2PAY</u> in the "Additional Feature Information" section of this Guide.

Runtime Settings

To accommodate different users and monitors, wbSCAN allows users to apply different themes to the wbSCAN application which affect how the application and its menus to display in the browser. This is performed by selecting the 'Run Time Settings' option from the 'Browse' menu.



When this option is selected, the Runtime Settings screen displays. The default them applied to the wbSCAN application is "wbTheme". To change the theme, select an option from the drop down provided.

In addition, how the application's menus display can be selected; as well as, where they are positioned on the screen.

Any changes made to the theme or menus will only be applied when the Save button is clicked.



LOGOUT BUTTON

Clicking the **Logout** button begins the application or system logout process. A confirmation message will display. Click the **Yes** button to log out of wbSCAN. Click the **No** button to abort the logout process and return to the home or main screen.



ADDITIONAL FEATURE INFORMATION

This section of the Guide contains information about a wbSCAN function that is available from multiple places throughout the application.

SCAN2PAY

Scan2Pay is a wbSCAN feature that allows mailers to scan pallets as they are produced and let the shop floor staff either mark the pallet for payment or actually pay postage for the scanned pallets in PostalOne! This is a more accurate and less labor-intensive process for managing partial mailings then using DAT-MAIL's user interface to mark pallets for payment prior to statement generation or creating a release file for PostalOne!

Scan2Pay - Getting Started

Depending on how it is to be used, Scan2Pay requires setup in the following Window Book products:

- DAT-MAIL (REQUIRED): Any use of Scan2Pay requires some setup in DAT-MAIL, first;
- Refer to the "wbSCAN Installation Guide" for instructions on how to enable Scan2Pay in DAT-
 - AWAM (OPTIONAL): if users want to use Scan2Pay to generate statements or release and export payment submissions to PostalOne!, Scan2Pay requires the use of DAT-MAIL's Advanced Workflow Automation Manager™ (AWAM™) and a specific AWAM post processing profile;
- Refer to the "wbSCAN Installation Guide" for instructions on how to create and set the necessary AWAM post processing profile that Scan2Pay should use.
 - PostalWeb Connector (OPTIONAL): For total automation, Scan2Pay requires the mailer to be submitting their Mail.dat files to *PostalOne!* using Window Book's PostalWeb Connector™ application and the USPS MDR Client software; and
- Refer to the "<u>PostalWeb Connector Installation & User Guide</u>" for information/instructions on how to install and set up the PROD MDR Client site and other features of the software.



K IMPORTANT:

For the payment process to be totally automated, no changes to the Mail.dat should be needed by the time the pallets are ready to be scanned! If a mailer frequently changes any of the following at the last minute, Scan2Pay should only be used to mark pallets for payment so these changes can be made as is performed when using manual statement generation or postage release:

- Permit information and/or payment method;
- By/For information in MPA/CPT;
- Piece Weight (future release); and
- Mailers are generating DAT-MAIL's statements and manually selecting a customer.
- wbSCAN (REQUIRED): Enable the wbSCAN action(s) that will trigger the Scan2Pay function. Refer to Scan2Pay Settings for more information.

If a specific wbSCAN scan action is enabled to trigger the Scan2Pay function, the Scan2Pay tab will display on that scan action's screen.



HOW SCAN2PAY WORKS



For the purpose of this document, it is assumed that the 'Activate Pallets' action was enabled as a trigger for the Scan2Pay function. These same instructions would also apply to any other action that was enabled to trigger the Scan2Pay function, as well.

In the *Activate Pallets* screen's 'Scan2Pay' tab, a list of jobs pertaining to the scanned pallets will be displayed. There is one line per Job ID, per Status; therefore, there can be multiple lines for the same Job ID if the pallets contain different statuses. The 'Job ID' referenced corresponds with the "DM Job ID" in DAT-MAIL.



There are three different Status values:

- Blank: The 'Status' field is blank or empty. Depending on the mailer's work flow, these pallets can either be "Marked" for payment or "Submitted" for payment;
- "Marked": Occurs when submission and payment of jobs occurs manually (i.e. AWAM is <u>NOT</u> used to generate statements or release and export payment submissions to *PostalOne!*); and
- "Submitted": Occurs when Scan2Pay uses AWAM to generate statements or release and export payment submissions to *PostalOne!*, using a specific AWAM post processing profile.



The total number of pallets associated with a Job ID are displayed in each line. If there are multiple lines for the same Job ID, the total number of Pallets associated with the Job will display in each line. The value in the 'Pallets' field will be the same for multiple instances of the same Job ID.

The number of scans that occurred involving a Job ID is also displayed (per status).



This screen is also useful to mailers who want to be sure they have scanned the last pallet of a job.

Jobs that have pallets that are ready to be paid will contain a **Pay for "X" pallet(s)** button in the 'Action' column. The value that displays for "X" correlates to the number of pallets associated with the job that can be paid. Select (i.e. highlight) a job's line item and press its' corresponding **Pay for "X" pallet(s)** button. This will mark the associated pallets for payment and tell AWAM to complete the payment process with postage statement/*PostalOne!* release file creation and release file update (if enabled). When the process is complete, the 'Status' column will display a value of "Submitted".



If a mailer's process does not allow full automation of payment from Scan2Pay because not all information in the Mail.dat is accurate at the time of scanning, they can elect to just mark pallets (and child trays or sacks) for payment. When the user goes into the Statement Generation or Postage Release screens in DAT-MAIL, these pallets and trays or sacks will be checked off for postage payment. The user only has to complete the rest of the process to complete postage payment.

