pitney bowes

Shipping and Mailing

Relay® Integrity Express

Version 2.4.4

Quick Start Guide

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1 - Creating a Relay Integrity Express Template

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Introduction

Relay Integrity Express provides Relay Inserters 2500 – 8000 with mail piece split and 2D Barcode placement. No Professional services are required and it is easy to set up a template in four quick steps.

To begin, you need to sign in to Relay Communications Hub at the following URL:

https://client.relayhub.us.pitneybowes.com/

The user name and instructions for setting your password are provided in your Welcome Email.

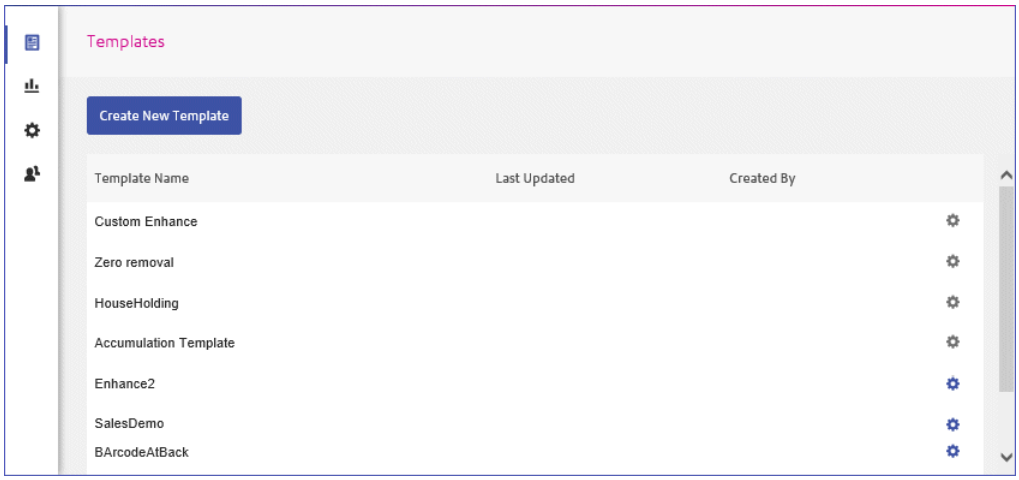
Once you have signed in the Relay Communications Hub web page is displayed.

Getting Started

To create a Template follow the instructions below:

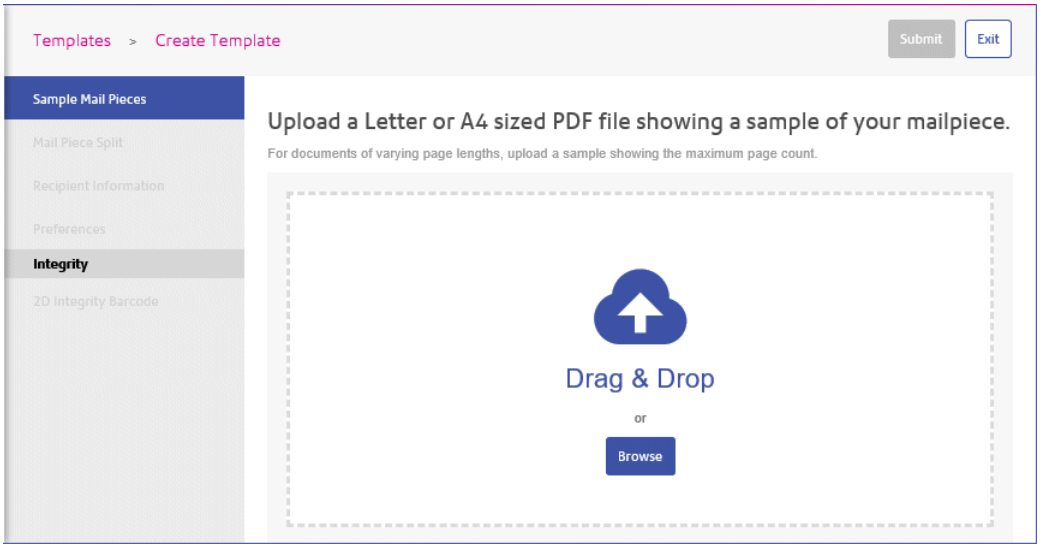
1. Click in the right-hand panel.

   The following page is opened:



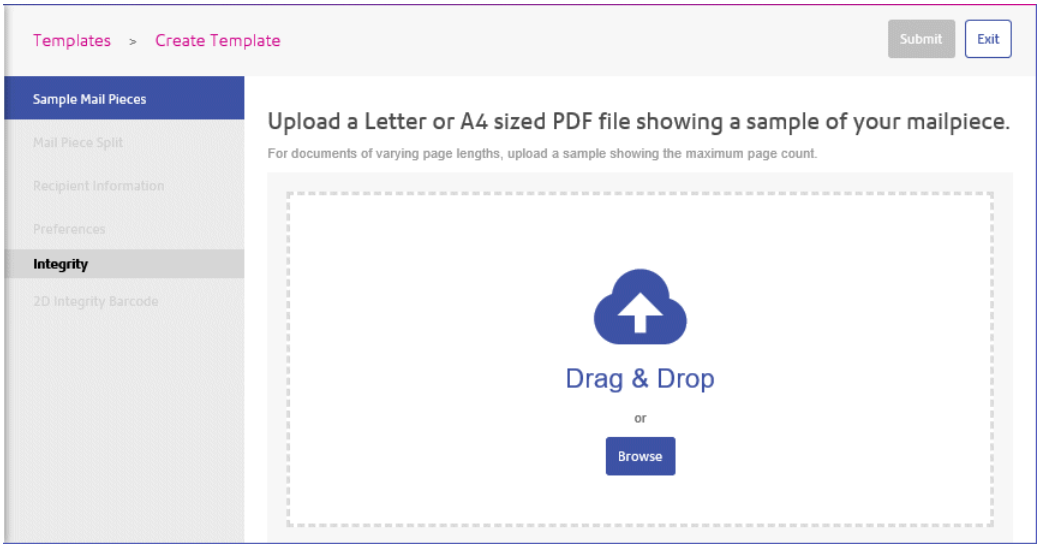
2. Click **Create New Template**.

   This opens the **Sample Mail Pieces** page.



Uploading a Sample Mail Piece

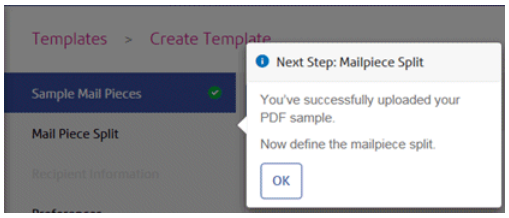
Continue in **Sample Mail Pieces** page, shown below:



1. Either:

   - Drag and drop the file into the panel, or
   - Click **Browse** to navigate to and select the one you need.

   Your file is opened in the **Templates** page.
2. A message is displayed advising that the operation was successful and which options to define next.



Click **OK**.

Note: A green check mark appears next to **Sample Mail Pieces** in the Template slide out menu.

Specifying Mail Piece Split

Your file contains a number of mail pieces, each one destined for a different recipient. Specifying where the mail pieces end, or are split, ensures that the recipient received only the mail piece intended for them and not the entire file or part of another recipient's mail piece.

You can split a mail piece in one of two ways, both are described below:

- **Where The Page Count is The Same Every Time** on page 6
- **Where The Page Count May Sometimes Vary** on page 7

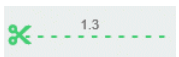
Where The Page Count is The Same Every Time

If your the page count in your mail pieces will be the same every time, create a page split as described below:

1. In the Template slide out menu select **Mail Piece Split**.
2. In **My Page Count** select **Will be the same every time**.
3. Specify **How many pages**.

   This must be a whole number.

4. Click **Apply Split Criteria**.
5. A message is displayed advising that the scissors graphic, shown below, is used to indicate the mail piece split. Click **OK**.

   The number shown above the dotted line given the mail piece and side number. In the example, 1.3, the mail piece in number 1 and the side number is 3.

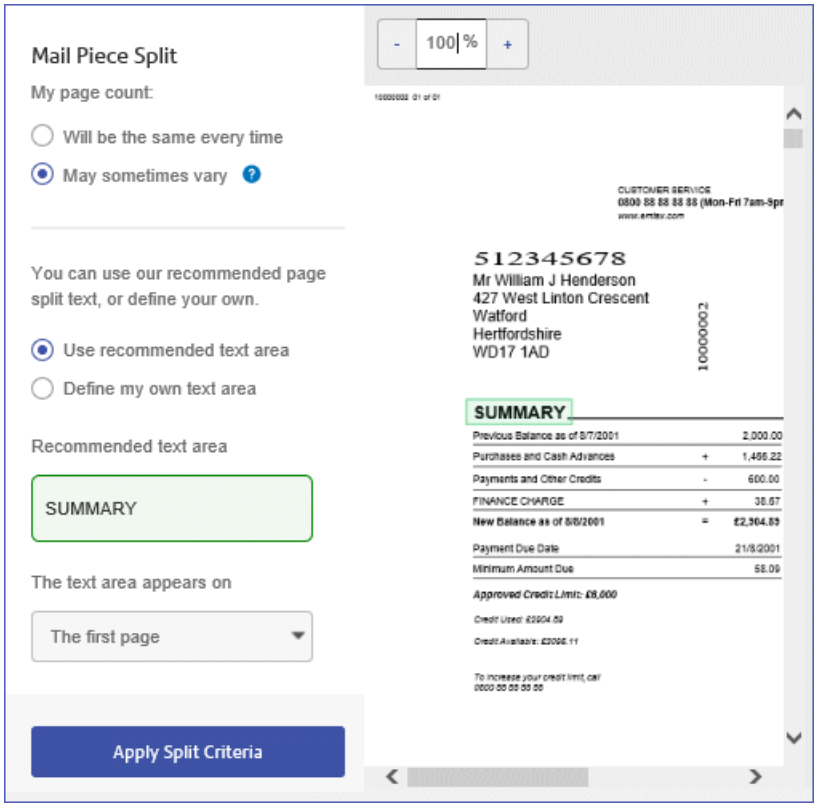
Note: A green check mark appears next to **Mail Pieces Split** in the Template slide out menu.

Where The Page Count May Sometimes Vary

If your the page count in your mail pieces may sometimes vary, create a page split as described below:

1. In the Template slide out menu select **Mail Piece Split**.
2. In **My Page Count** select **May Sometimes Vary**.

   Further options are then displayed in the panel:



3. Select either:

   - Select **Use recommended text area** and continue to step #6. In the panel, the recommended text is show in **Recommended text area**, in the example this is, "Summary". In the mail piece "Summary" is outlined in green.
   - Select **Define my own text area** and continue to step #4.

4. Click and drag a box around the required text.

   Note: The selected text must only appear once in the mail piece.

A further box is opened in the **Mail Piece Split** panel giving **Your defined text area**.

5. Select whether **The copy in this text area will**:
   - **Never Change** - so that the same text is used to find the correct page.
   - **Always Change** - to find the text box rather than the text.. If you select this option continue to step #6.
6. Select **The text area appears on** from the list.
7. Click **Apply Split Criteria**.
8. A message is displayed advising that the scissors graphic, shown below, is used to indicate the mail piece split. Click **OK**.

The number shown above the dotted line given the mail piece and side number. In the example, 1.3, the mail piece in number 1 and the side number is 3.

Note: A green check mark appears next to **Mail Pieces Split** in the Template slide out menu.

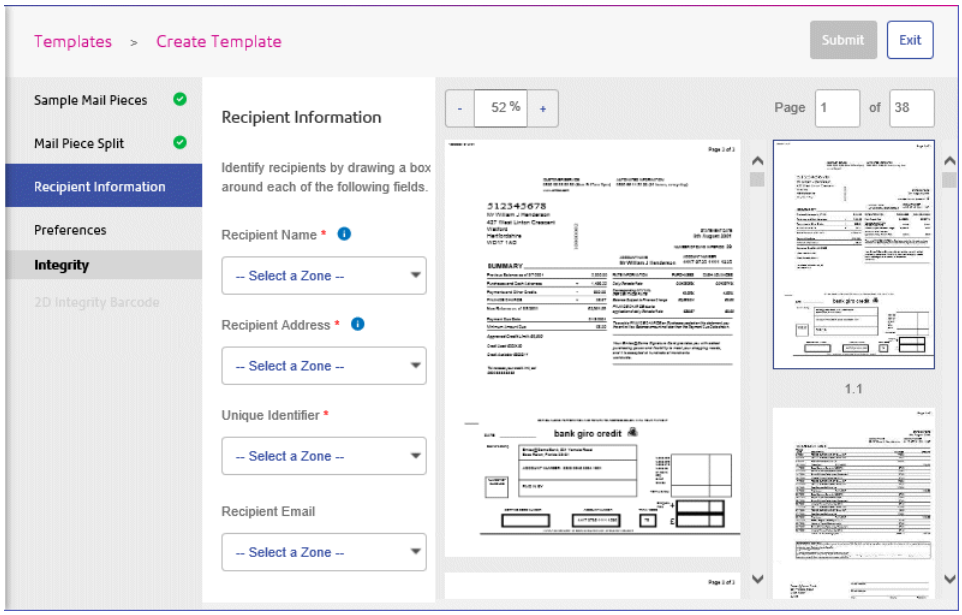
Identifying Recipient Information

To identifying recipient information, follow the procedure below:

Note: In this section only the **Recipient Name**, **Recipient Address** and **Unique Identifier** are required. The **Recipient Email** is only required where mail pieces are to be emailed rather than posted.

1. In the left-hand panel click **Recipient Information**.

   This opens the **Recipient Information** page, shown below:



The panel on the left gives the **Recipient Information**, the middle panel shows the uploaded file and the right-hand panel gives a preview of the settings as you apply them.

2. Click and drag a box around the recipient name in the mail piece.

   This area appears as a green box, as shown below. The number is the zone, which you'll need in the next step. If required, click X to delete the box.

   We strongly recommend making the box longer to accommodate longer recipient names in the remainder of the file.

3. From **Recipient Name** select Zone 1, created in the previous step.

   The required zone is displayed in the list with the name of the recipient from the mail piece on which the box was created.

4. Click and drag a box around the recipient address.
5. From **Recipient Address** select Zone 2, created in the previous step.

   We strongly recommend making the box larger to accommodate longer addresses in the remainder of the file.

   The required zone is displayed in the list with the address from the mail piece on which the box was created.

6. Click and drag a box around the a unique identifier, for example, the recipient's account number.
7. From **Unique Identifier** select Zone 3, created in the previous step.

8. If available, click and drag a box around the a recipient email.
9. From **Recipient Email** select Zone 4, created in the previous step.

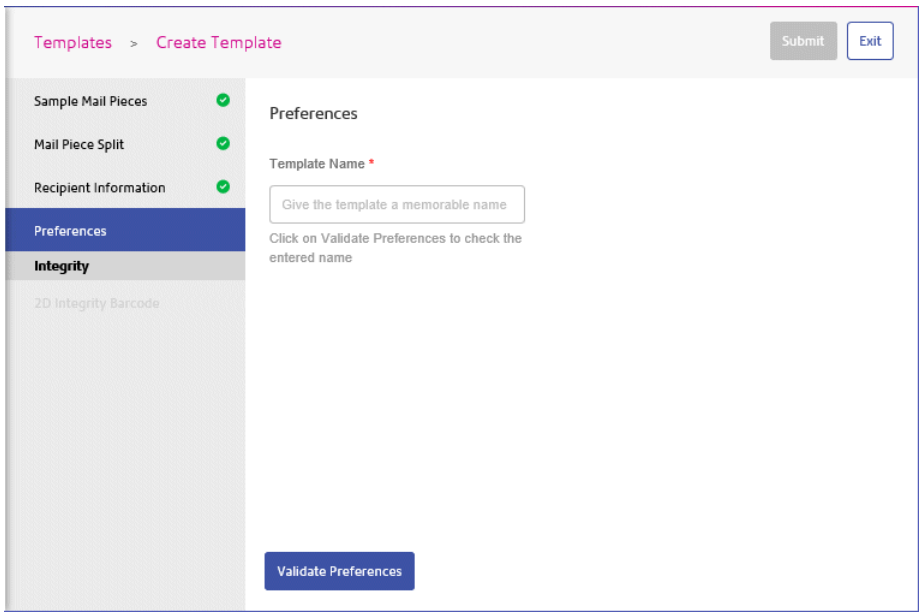
   Note: A green check mark appears next to **Recipient Information** in the Template slide out menu.

Specifying Preferences

To specify a template name, follow the procedure below:

1. In the Template slide out menu click **Preferences**.

   This opens the **Preferences** page, shown below:



   Use - 52 % + to adjust the scale in which the mail piece is displayed.

2. In **Template Name** type in a name.
3. Click **Validate Preferences**.

   Note: A green check mark appears next to **Preferences** in the Template slide out menu.

Creating a 2D Integrity Barcode

Currently, the only Integrity option is to place a 2D barcode on a page.

To create a 2D Integrity Barcode, follow the procedure below:

1. In the left-hand panel click **2D Integrity Barcode**.

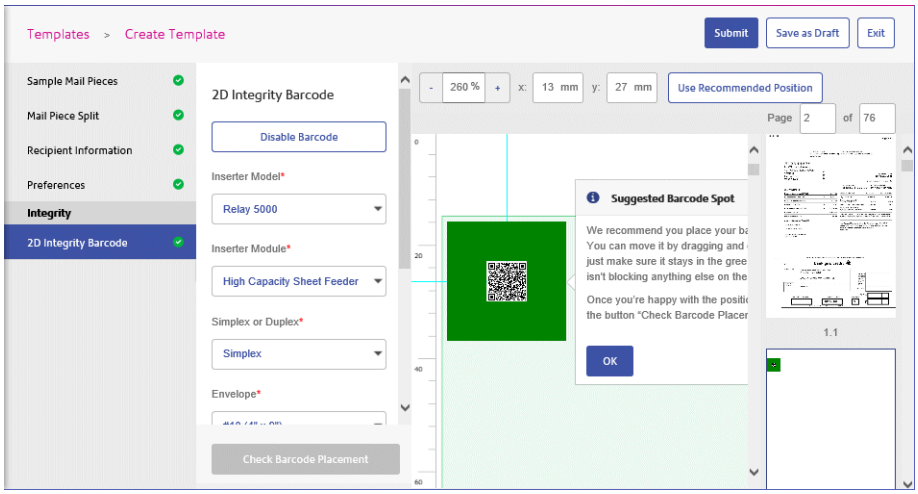
   This opens the **2D Integrity Barcode** page.

2. Click **Enable Barcode**.

   A message is displayed advising that the selected inserter options will add blank pages to your mailpieces. These options are described in **Configuring Inserters**.

3. Click **OK** to close the message.

   The following is opened:



   Click **OK** to close the message.

4. In **Inserter Model**, select the model of the inserter you will be using.
5. In **Inserter Module**, select the required module.
6. In **Simplex or Duplex**, select whether the documents using this template will print single- or double-sided.

   If you select **Simplex**, a blank back side is displayed in the **Pages** panel for every front side of the template.

   The following is shown at the end of every mail piece:

Each page has a two digit designation, for example, 1.1 indicates that the page is the first mail piece's first side, 1.2 is the first mail pieces second side and 3.3 indicates that the third mail piece's third side.

7. In **Envelope**, select the size required.
8. In **Fold**, select how the mail pieces are to be folded.
9. In **Insert**, select either:
   - No Insert
   - The required insert from those available
10. In **Address Location**, the area of the mail piece in which the address appears.
11. Do one of the following:
    - Click **Use Recommended Position**.
    - Click and drag the barcode into the required position and click **Check barcode Placement** to ensure that the location is satisfactory. If it is not, repeat until you find one that is satisfactory.
    - Type in the x and y coordinates the barcode is placed. These coordinate specify the center of the barcode. Click **Check barcode Placement** to ensure that the location is satisfactory.

    If it is not, repeat until you find one that is satisfactory.

    If barcode placement is unsatisfactory, as indicated by its red border, scroll through the job or click a red page number open the effected page. Click and drag the barcode to a location clear of other content, where its border changes to amber. One way of doing this quickly is to click Use Recommended Position and resubmit the Template.

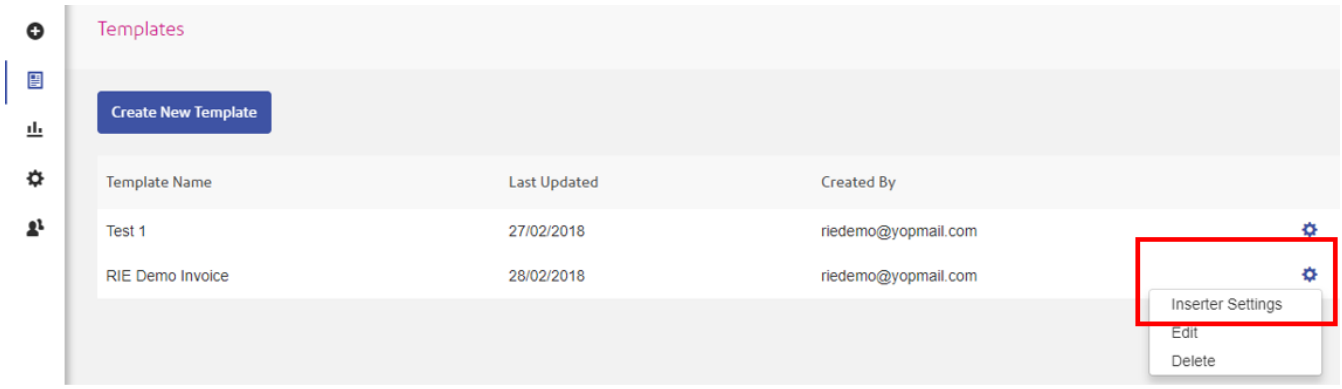
    A message is displayed to confirm that the draft is submitted successfully.
12. Click **Submit**.

    Note: A green check mark appears next to **2D Integrity Barcode** in the Template slide out menu.

Configuring Inserters

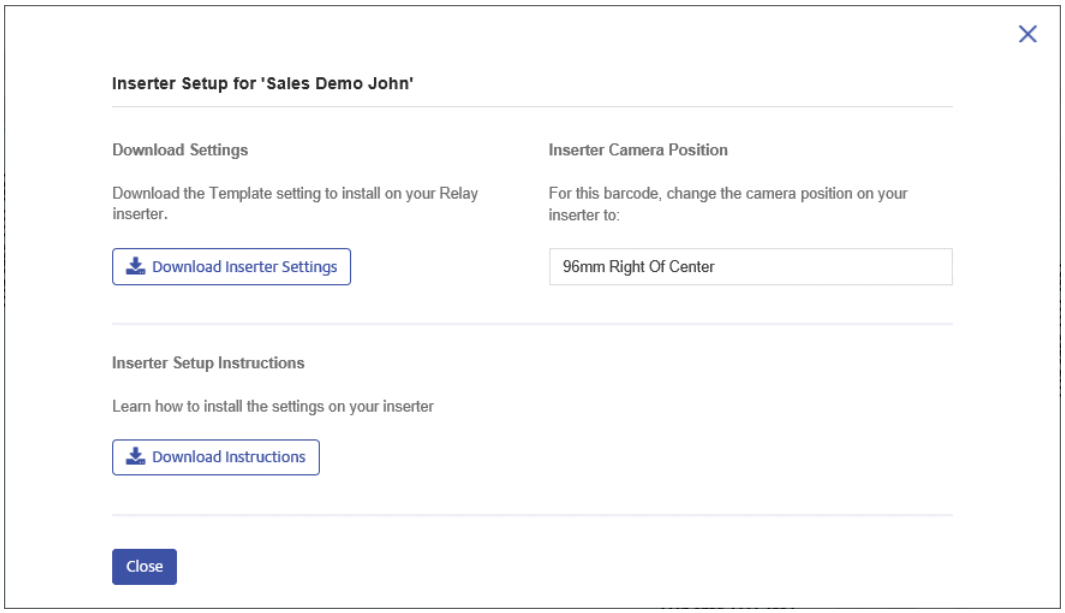
To configure a Template's inserter, follow the procedure, next:

1. From within the **Templates** page, shown below, find the new template and click .



2. From the context menu select **Inserter Settings** (only for Relay 5000 – 8000).

   The following is displayed:



3. Click **Download Instructions** to download a PDF file describing this process. We strongly recommend that you print these and have them available while undertaking this procedure.
4. Insert the flash drive into a USB slot on the PC.
5. Click **Download Inserter Settings**.
6. Click the down arrow on the **Save** button.
7. Navigate to the required location on the flash drive and click **Save as**.
8. Click **Save**.
9. Make a note of the **Inserter Camera Position**, you will need this to set the camera on your inserter so that it is able to read the barcodes on the pages of your job. You the need to remove the flash drive and use it to load the file onto your chosen inserter. Use the measurement given in **Inserter Camera Position** and change the inserter's camera position, if required.

2 - Submitting and Downloading Output Files

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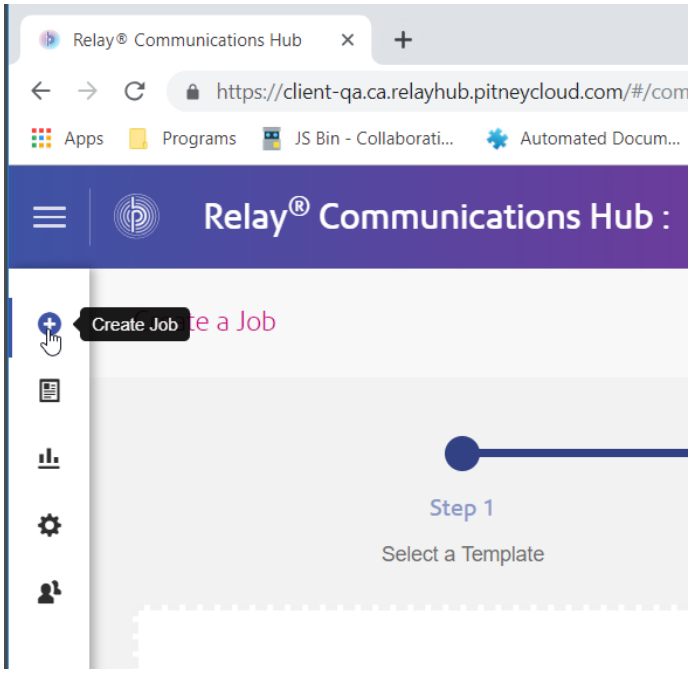
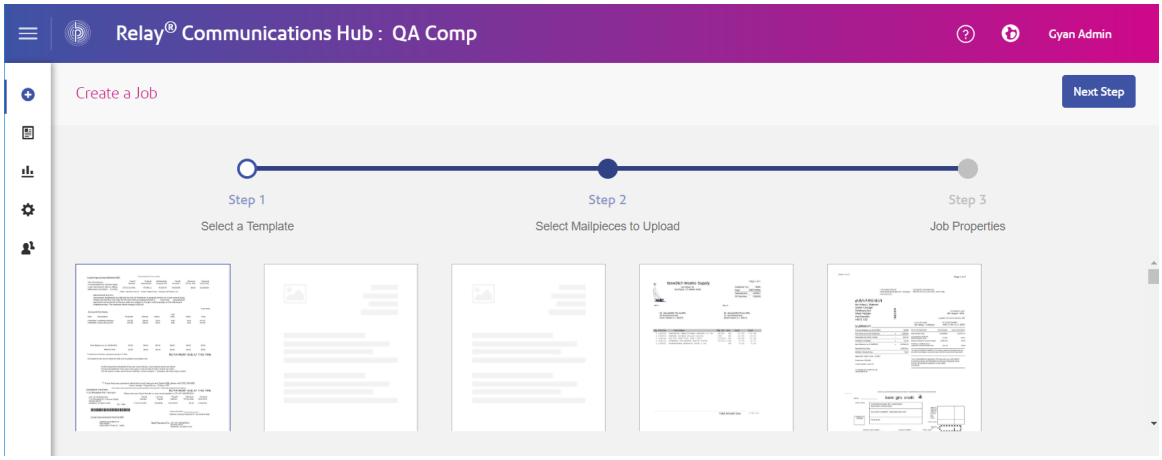
Submitting a Job

Use your newly created template to apply the 2D barcode to documents that are in the same format.

1. Click **Create a Job**, on the **Relay Communications Hub** home page.

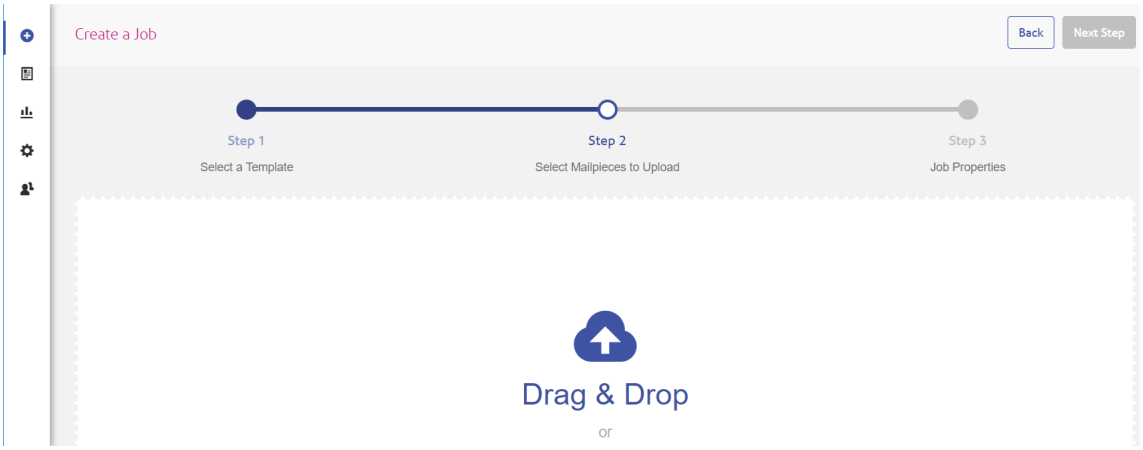


2. Select the template you want to use and click **Next Step** in the upper right of the screen.

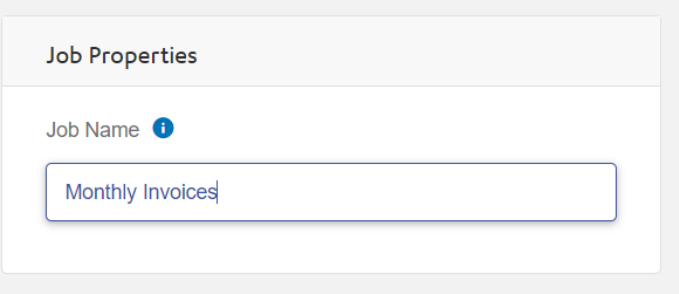


3. Either:

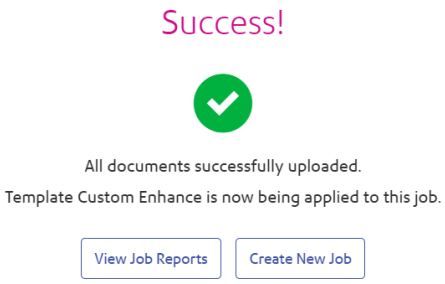
   - Drag and drop the file into the panel, or
   - Click **Browse** to navigate to and select the document. The document should be in the PDF format.



4. Click **Next Step** after the file is added.
5. Enter a name for the job in the **Job Name** box. Click **Submit** in the upper right of the screen.



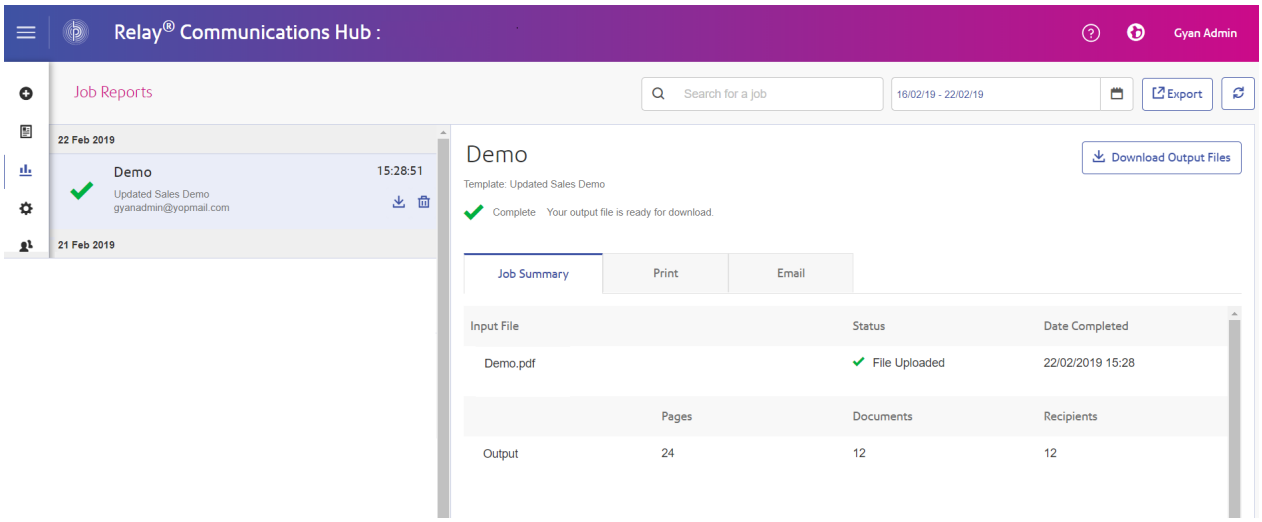
A pop up message displays indicating the documents are being uploaded. When complete, a green check mark appears and a confirmation message is displayed stating that the PDF has been successfully uploaded.



Click the **View Job Reports** button to see the reports.

Downloading Output Files

1. Click in the left-hand panel to go to the **Job Reports** screen, a green check mark indicates the job is complete.



2. Click in the upper right corner of the screen to ensure you have the most up to date information.
3. Select the file you want to download from the list.
4. Click the **Download Output Files** button in the upper right of the screen to download the document, which now have the 2D barcode applied and will be ready for insertion using your Relay Inserter.
5. Alternatively, you can also click in the left-hand panel to download your document.

3 - More Information

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