Track My Mail™

User Guide

Version 3.8.0 | February 2016

TrackMyMail
1 Vantage Way
Suite C240
Nashville, TN 37228

Support:
1.888.444.9972, Option 1

TMMCustomerService@pb.com

Contents

1 Introduction

In this Chapter

Welcome to TrackMyMail's online user guide designed to assist you in setting up and running reports using TrackMyMail. Users with varying degrees of knowledge and experience will find this guide useful. It is expected that you have some knowledge of the operating system on which you are running the software.

TrackMyMail services are built on the expertise and insight of Pitney Bowes, the world's leader in mailing solutions since 1920.

TrackMyMail is an Intelligent Mail® tracking service technology, which is entirely web based and provides easy access to real-time tracking data and custom reports for end-users, printers and mailers. It offers a user-friendly, online dashboard that provides end users a complete view into the life of their mailings.

One of the unique features of TrackMyMail is the ability to schedule reports to run one time on a planned date or to run on a recurring basis. These reports are delivered to you via email or FTP.

What's New

This section described new features and functionality available in TrackMyMail with this release.

Going forward, this section will list the new features and functionality being provided with this new release.

What's Changed

The following changes will be made to existing TrackMyMail tab sections.

Going forward, this section will list changes and enhancements to existing features.

System Requirements

Windows XP or higher
Unix Solar, AIX 32 bit, AIX 65 bit, Redhat Linux, Sun SPARC Solaris OS
512 MB RAM (minimum)

Supported Browsers

TrackMyMail supports Chrome, Firefox and Internet Explorer (IE) 9 and above.

Port 443 Access

The software program needs read/write access to the directory where the software resides.

Port 443 is used for secure web browser communications. TrackMyMail uses Port 443 because data transferred across this connection is highly resistant to interception or eavesdropping. Verification of the identity of the remotely connected server can be done with significant confidence. A secured connection is identified by an icon, for example, an unbroken key or a padlock.

The software program needs read/write access to the directory where the software resides. Access to Port 443 is also required for the software to manage the unique Intelligent Mail processing through a secure communication connection.

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InHome™

Enhancement/Defect Submission Process

TrackMyMail is diligent about improving and testing its software. New versions of the software that include enhancements and address any issues identified in prior versions are released on a regular and frequent basis. We do realize end users may require or have valuable suggestions for enhancing our software to benefit their businesses. TrackMyMail has a well-defined process in place to allow you to submit your enhancement requests. The same process is used to submit a bug (also known as a defect or a fix). The steps below outline the process and identify the steps to take.

Identify the Need or Issue for Software Changes

Changes fall into two categories: enhancements or bugs.

- Enhancement: An enhancement is a feature or function not currently in the software that you/your company are requesting TrackMyMail to add.
- Bug: A bug is a problem with the coding or functionality of the software as it currently exists.

Determine into which category your request falls in order to submit it to TrackMyMail for processing.

Submit the Request for Software Changes

The process for submitting an enhancement or a bug is simple.

- Send an email to TMMCustomerService@pb.com.
- Identify in the subject line the product for which the change is being requested and the category of the change: enhancement or bug.
- Describe in the body of the email the enhancement features or functionality you would like to have added to the software. Please be as clear and specific as possible; or
- Describe in the body of the email the bug issues in as much detail as possible, for example:

  -Does the job/report run to completion; does it abnormally terminate?

- Include your contact information in the email body – your name, company name, your telephone number and your email address.

While all submissions are reviewed and evaluated, not all enhancement requests will be included in the software.

All submissions are logged into our tracking system and a tracking number is assigned.

Acknowledgement of Submission

An email is generated stating that the submission has been received and logged into our tracking system. The email contains the tracking number for your records.

Support

If you require assistance, a TrackMyMail representative can be reached through any of the contact methods below:

Support email:	TMMCustomerService@pb.com
Support phone:	1.888.444.9972, Option 1
Mailing address:	TrackMyMail 1 Vantage Way Ste C240 Nashville TN 37228
Web site:	http://www.trackmymail.com
Hours:	Monday - Friday 8:30 a.m. - 8:00 p.m., ET

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In this Chapter

TrackMyMail Access

TrackMyMail provides you with the ability to create a job, track mailpieces from that job using limited information -- a unique id, a name or business name. You can also run standard reports or create your own ad hoc reports to analysis the success and efficiency of your mailing.

This chapter covers accessing TrackMyMail, from the secure url, acquiring and using the user ids and passwords and some basic information about TrackMyMail.

Accessing TrackMyMail

Open your Internet browser and access the TrackMyMail site: https://www.trackmymail.com. TrackMyMail is compatible with most major browsers.

On the website, click **LOGIN TO TRACKMYMAIL** to access the product. Your Client Services Representative confirms the email address to use for logging in along with access instructions.

Welcome/Log In

1. User ID and Password are required to access the secure site.

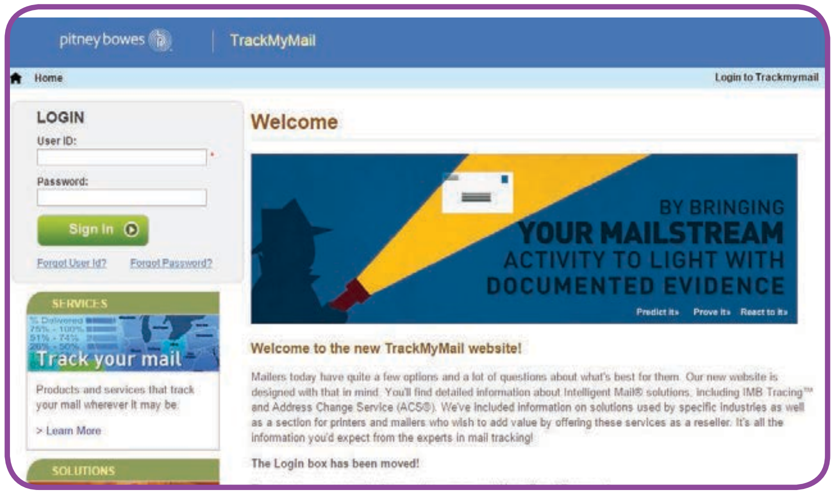
2. Options are available to retrieve your User ID - **Forgot User Id?** and your Password - **Forgot Password?**

3. If you are a first-time user, you will receive a randomly generated password delivered to the email address provided to TrackMyMail.

TrackMyMail access varies based on the permissions assigned to the user logging in.

TrackMyMail is the reporting software used in conjunction with PrecisionTrack. It is important at this point to understand the levels within this process to determine at which level you want to grant access to TrackMyMail reports.

Log in screen:



Passwords are a minimum of eight characters and must include at least one upper-case letter, one lower-case letter and one numeric character.

Click “Forget Your Password?” to have a temporary password emailed to you.

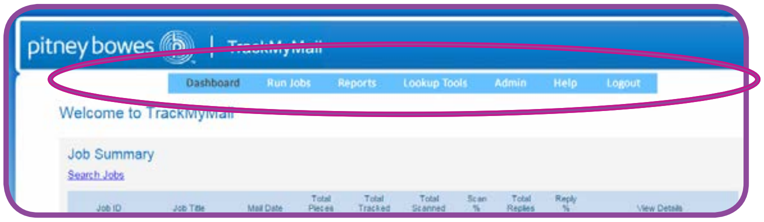
Levels at which a user can log in to TrackMyMail include:

- Reseller Master
- Vendor Master
- Reseller
- ResellerClient
- Vendor
- Client
- Admin

Using TrackMyMail

The initial TrackMyMail screen offers access to the following areas via tabs. Tabs are available based on the permission/access level at which your account was created.

This screen shows all potentially available tabs.



Based on your permission/access level, you may not see all of the tabs displayed on the screen above.

- **Dashboard** - displays the Job Summary, information for all jobs processed within the last 30 days.
- **Run Jobs** - provides access to two areas:
  - PrecisionTrack for job creation.
  - IMb Reservation to reserve a series of IMbs to be used.
- **Reports** - provides access to standard and ad hoc reports for jobs processed through PrecisionTrack.
- **Lookup Tools** - uses minimal data to retrieve available information about a specific mailpiece.
- **Admin** - access to the **Admin** tab is based on the user profile. Some user may not have access to this tab. Users with appropriate permissions in the user profile may see the **Edit Profile** and/or **Manage Accounts** options.
- **Help** - provides access to the TrackMyMail Quick Start and User Guide.
- **Logout** - closes and disconnects you from the application.

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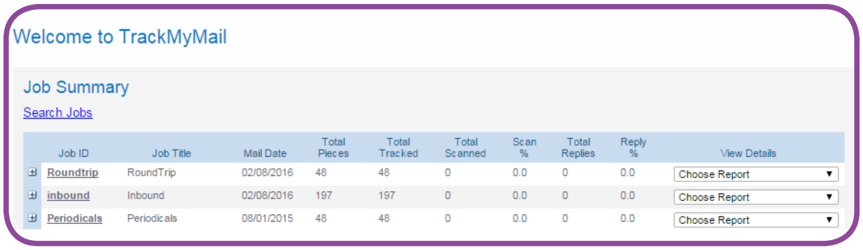
In this Chapter

Dashboard

The **Dashboard** tab provides access to a vast amount of information for processed jobs. All jobs processed within the last 30 days are displayed. If permissions allow, use the **View Details** drop-down list to run one of the standard reports available for each job.



Job ID	Job Title	Mail Date	Total Pieces	Total Tracked	Total Scanned	Scan %	Total Replies	Reply %	View Details
Roundtrip	RoundTrip	02/08/2016	48	48	0	0.0	0	0.0	Choose Report
inbound	Inbound	02/08/2016	197	197	0	0.0	0	0.0	Choose Report
Periodicals	Periodicals	08/01/2015	48	48	0	0.0	0	0.0	Choose Report

Content Breakdown

Information presented on the **Dashboard** includes:

Job ID - the unique alphanumeric identifier associated with a job. This is also a link to the additional job summary screens; if multiple versions of a job exist, a "+" is displayed next to the Job ID.

Job Title - the unique name you created to help you easily identify the job; for example, Spring Mailer, College Students Offer.

Mail Date - the date on which your mail was submitted to the USPS.

Total Pieces - indicates the total number of mailpieces in your mailing.

Total Tracked - indicates the total number of mailpieces in the mailing that are being tracked.

Total Scanned - indicates the total number of tracked mailpieces that were scanned.

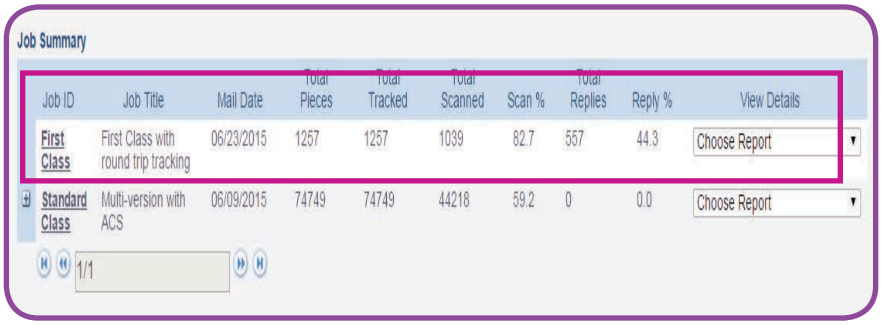
Scan % - of the mailpieces being tracked, this indicates the percentage of pieces that have been scanned.

Total Replies - the total number of return mailpieces received from your mailing.

Reply % - the percentage of replies in relation to the number of mailpieces put into the mail system. This is calculated based on Origin IMb tracking on remit mailpieces.

View Details - is permission based. The drop-down box provides quick access to all standard TrackMyMail reports. These reports are also accessible from the **Reports** tab, where more detailed information is available.

The Dashboard provides access to information on all processed jobs associated with the log in information used.



View Details is permission based. If available, click the drop-down list next to any job processed and access the following reports. Reports run from the Dashboard are job specific. Reports for any job processed are available also from the **Reports** tab.

- Daily Scans
- Delivered Origin Pcs
- Details by Map
- Download USPS Data
- Inbound Performance by Date
- Mailpiece History
- Proj InHome by 3DZIP
- Proj InHome by 5DZIP
- Proj InHome by NDC
- Proj InHome by SCF
- Proj InHome by State
- Proj InHome by User 1
- Redirected Mail
- Results by USPS Area
- Update Pro
- View Results by Date
- View Results by NDC
- View Results by SCF
- View Results by State
- View Results by User 1
- View Results by User2
- View results by ZIP

See Appendix A for a detailed description of each report.

Based on your login, you may see an additional column at the beginning of the Job Summary. This column identifies the vendor, reseller or reseller client.

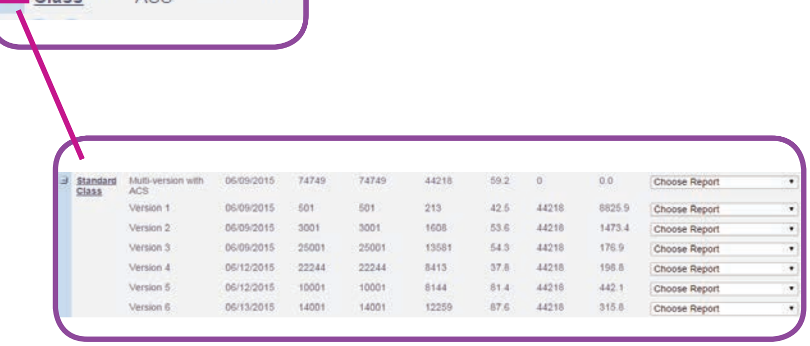
A Job with Multiple Versions

When multiple versions of the same job exist, a plus sign ("+") icon is displayed next to the Job ID. Click the "+" icon to expand the list and view all versions of the job.

The same standard reports available using the **View Details** drop-down list are available for the additional versions.

Jobs can be edited from the **Job Summary, Mailing Details** screen.

Icon indicating multiple versions of a job exist:



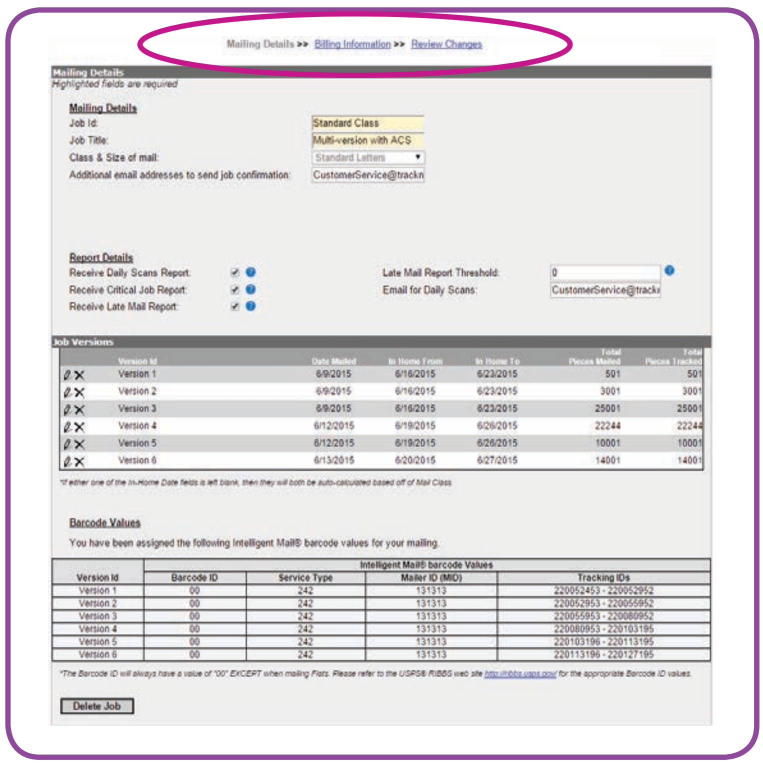
Expanded view of multiple versions.

Job Summary

Click on **Job ID** to access the following screens. Some fields can be edited on this screen if user permissions allow.

Edits made on this screen are on the job level only. **Note**: If a Job has multiple versions, those versions can also be edited. Changes to a version are applied only to that specific version being edited and not to the original job or any other versions of the job.

- **Mailing Details** - displays information about that specific mailing including Mailing Details, Reports Details and Barcode Values; some fields are editable.
- **Billing Information** - allows you to change the billing contact's mailing information along with the phone number and email address for this job.
- **Review Changes** - presents a view of the updated information; you have the option to accept the changes and continue or go to the previous screens and make any needed changes.



Mailing Details

Mailing Details is comprised of three sections. Each is covered below. All fields highlighted in yellow are required fields. Fields can be edited if permissions allow.

Mailing Details

From the **Mailing Details** section of the screen, you have the ability to edit:

- **Job ID** - required
- **Job Title** - required
- **Additional email address to send job confirmation**
- **Total pieces mailed** - required
- **Date mailed** - required
- **InHome date start**
- **InHome date end**

Note: if either the InHome date start or InHome date end field is left blank, both fields will be auto-calculated based on the mail class assigned in the **Class & Size of mail** field.

Report Details

From the **Report Details** section of the screen, indicate that you would like to receive daily email notifications regarding your mailing. Notifications are sent daily by 11:00 a.m. ET.

Check the box next to the report(s) you would like to receive. Click the help button (“?”) to view additional information.

- **Receive Daily Scans Reports**
- **Receive Critical Job Report**
- **Receive Late Mail Report**

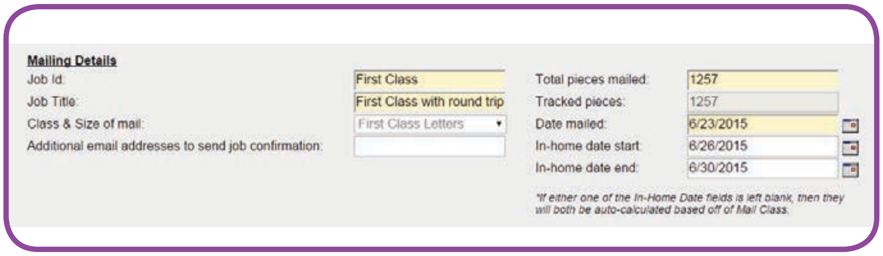
If you’ve checked the box **Receive Late Mail Report**, you must enter a value in the **Late Mail Report Threshold** field.

- **Late Mail Report Threshold -** the value entered , as a percent, triggers the **Late Mail Report**. The Report is emailed daily beginning with the first targeted InHome window when the percentage of tracked pieces delivered is less than the threshold.

- **Email for Daily Scans** - enter the email address(es) to which the **Daily Scans Report** should be sent.

Highlighted fields are required fields in this section.

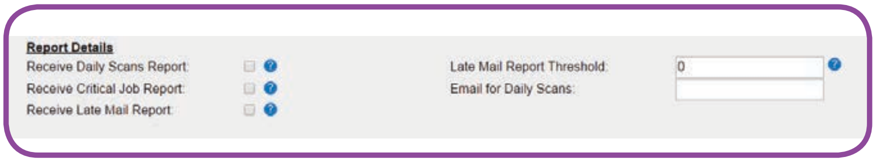
Mailing Details



The total number of pieces mailed must be greater than or equal to the tracked pieces. If the total pieces mailed is entered as less than the tracked pieces, an error message is displayed.

The date mailed must be earlier than the InHome date start and end dates. The InHome date start must be earlier than or equal to the InHome date end.

Report Details



- **Receive Daily Scans reports** - a daily email notification to let you know which of your jobs are receiving final scans, the number of scans received today and cumulative to-date total. All jobs with this report checked will be added to the report on the day following the mail date provided.

- **Receive Critical Job Report -** a daily email notification, which begins arriving on the day before the first targeted InHome date start and continues to be sent throughout the duration of the targeted InHome date end, indicates which of your jobs are receiving scans and how the scan compare to your targeted InHome dates. This report is distributed **only** for jobs with **Receive Critical Job Report** selected.

- **Receive Late Mail Report** - a daily email notification indicating which of your jobs have cumulative scans below the **Late Percent Threshold (**identified in your profile and entered when **Creating Jobs**) by the start of your targeted InHome date. This report is distributed **only** for jobs with **Receive Late Mail Report** selected.

Job Versions

In this section, you can edit each version by clicking the pencil icon or delete a version by clicking the “x”. A confirmation box is presented before the version is deleted.

Editable fields include:

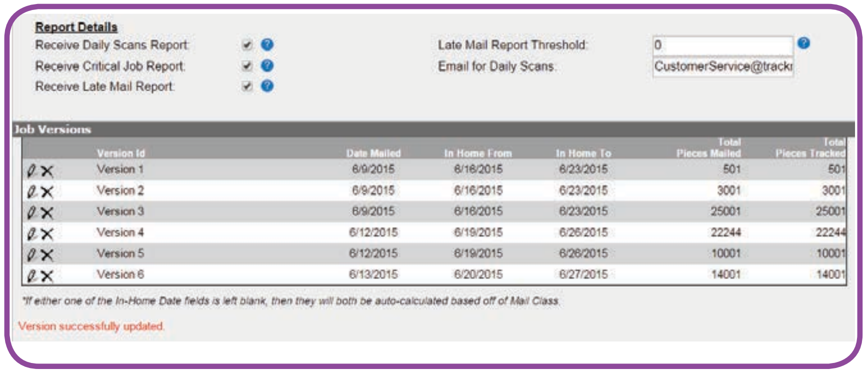
- **Version ID** - required
- **Date Mailed** - required
- **InHome From**
- **InHome To**
- **Total Pieces Mailed** - required

A verification of changes is displayed when a version has been edited/updated.

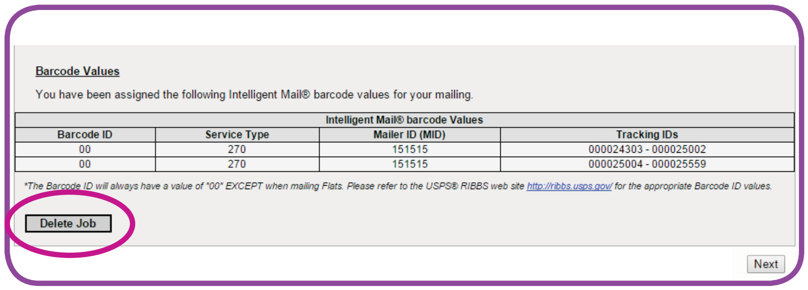
A job can be deleted by clicking **Delete Job** at the bottom of the screen. A confirmation box is presented before the job is deleted. Click **OK** to continue the deletion process.

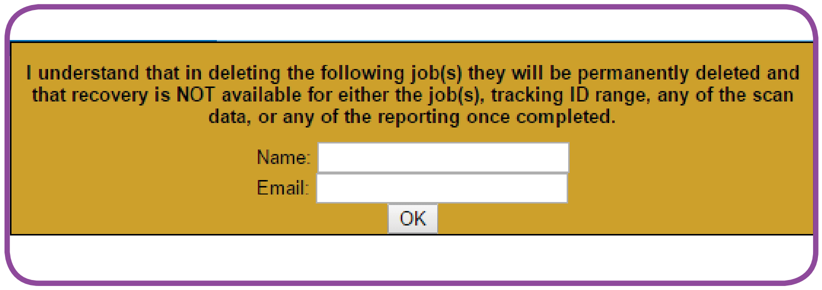
Next, a message box requires you to enter your name and email address prior to deleting the job. Enter your name and email address, click **OK** and an email containing relevant job information and your name/email address as the user deleting the job is sent to TMM Customer Service and to the email address provided in the confirmation box.

Job Versions



Delete Job *confirmation box*





When the deletion process is complete (you enter your name, email and click OK), the job/associated ve rsions, track ng ID range, scan data and reporting data is **NOT** recove rable

Barcode Values

The **Barcode Values** section lists the Intelligent Mail barcode values that have been assigned to the job selected. Available information includes:

- **Version ID** - shows the job version, if various versions exist.
- **Intelligent Mail barcode Values:**
    - **Barcode ID** - always has a value of "00" except when mailing Flats.
    - **Service Type -** also referred to as a STID (Service Type ID) is a three-digit numeric code that identifies the address correction or other electronic services desired and is used within the IMb on a mailpiece.
    - **Mailer ID (MID) -** is a field within the IMb that is used to identify mailers. MIDs are USPS assigned.
    - **Tracking IDs** - are the tracking IDs assigned to the mailpieces in this job.

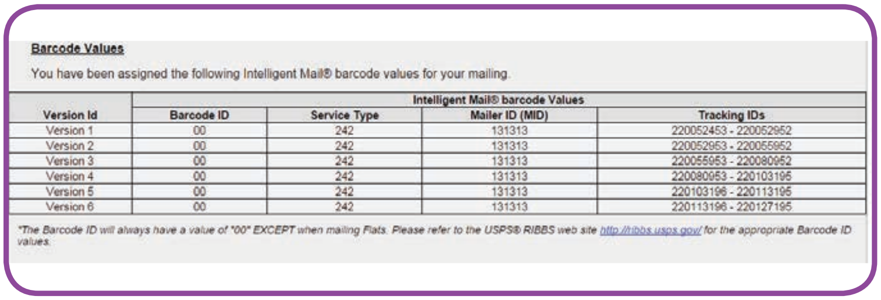
Click **Delete Job** to delete the job and all versions associated with that job.

Billing Information

Billing Information provides the current information for the billing contact based on the logged-in user. From this screen, you can edit this information for this job or version:

- **First Name** - required
- **Middle Initial**
- **Last Name** - required
- **Company Name** - required
- **Suite/Apartment number**
- **Street Address** - required
- **City/State** - required
- **ZIP Code** - required
- **Phone number** - required
- **Fax number**
- **Email** - required

Barcode Values



Barcode Values

You have been assigned the following Intelligent Mail® barcode values for your mailing.

Version Id	Intelligent Mail® barcode Values			
	Barcode ID	Service Type	Mailer ID (MID)	Tracking IDs
Version 1	00	242	131313	220052453 - 220052952
Version 2	00	242	131313	220052953 - 220055952
Version 3	00	242	131313	220055953 - 220080952
Version 4	00	242	131313	220080953 - 220103195
Version 5	00	242	131313	220103196 - 220113195
Version 6	00	242	131313	220113196 - 220127195

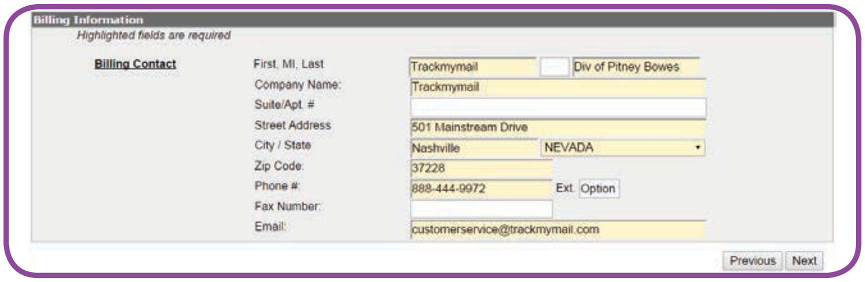
*The Barcode ID will always have a value of "00" EXCEPT when mailing Flats. Please refer to the USPS® RIBBS web site http://ribbs.usps.gov/ for the appropriate Barcode ID values.

The Barcode ID always has a value of "00" **except** when mailing Flats. Please refer to the **USPS RIBBS web site** (http://ribbs.usps.gov) for the appropriate Barcode ID values.

If changes are made to the **Mailing Details** screen, you must continue to **Review Changes** and click **Save Changes** to finalize the changes.

The exception is changes made to the **Job Versions** are saved at the level the changes are made by clicking the **Save Version** or **Cancel Changes** icon.

Billing Information



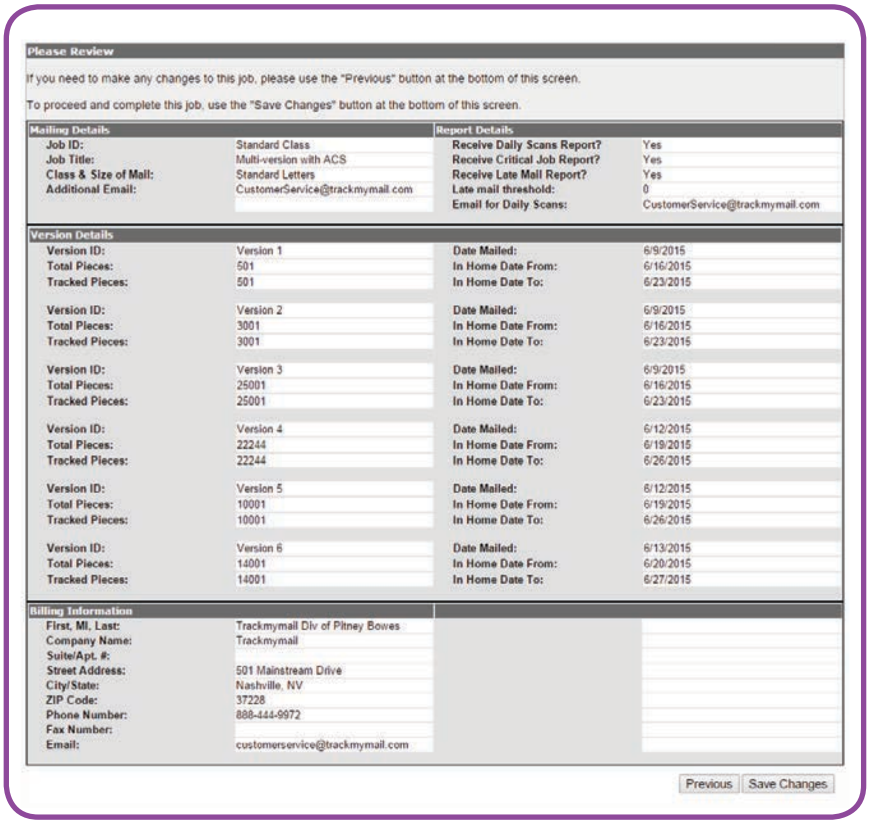
Review Changes

This screen shows all the changes that were made on the **Mailing Details** and **Billing Information** screens. If no changes were made, the current information is displayed.

Click **Previous** to go back to the Mailing Details and/or Billing Information screens to make additional edits or click **Save Changes** to save the changes as displayed.

△ The highlighted fields are required.

Review Changes



Please Review

If you need to make any changes to this job, please use the "Previous" button at the bottom of this screen.

To proceed and complete this job, use the "Save Changes" button at the bottom of this screen.

Mailing Details		Report Details	
Job ID:	Standard Class	Receive Daily Scans Report?	Yes
Job Title:	Multi-version with ACS	Receive Critical Job Report?	Yes
Class & Size of Mail:	Standard Letters	Receive Late Mail Report?	Yes
Additional Email:	CustomerService@trackmymail.com	Late mail threshold:	0
		Email for Daily Scans:	CustomerService@trackmymail.com

Version Details			
Version ID:	Version 1	Date Mailed:	6/9/2015
Total Pieces:	501	In Home Date From:	6/16/2015
Tracked Pieces:	501	In Home Date To:	6/23/2015
Version ID:	Version 2	Date Mailed:	6/9/2015
Total Pieces:	3001	In Home Date From:	6/16/2015
Tracked Pieces:	3001	In Home Date To:	6/23/2015
Version ID:	Version 3	Date Mailed:	6/9/2015
Total Pieces:	25001	In Home Date From:	6/16/2015
Tracked Pieces:	25001	In Home Date To:	6/23/2015
Version ID:	Version 4	Date Mailed:	6/12/2015
Total Pieces:	22244	In Home Date From:	6/19/2015
Tracked Pieces:	22244	In Home Date To:	6/26/2015
Version ID:	Version 5	Date Mailed:	6/12/2015
Total Pieces:	10001	In Home Date From:	6/19/2015
Tracked Pieces:	10001	In Home Date To:	6/26/2015
Version ID:	Version 6	Date Mailed:	6/13/2015
Total Pieces:	14001	In Home Date From:	6/20/2015
Tracked Pieces:	14001	In Home Date To:	6/27/2015

Billing Information	
First, MI, Last:	Trackmymail Div of Pitney Bowes
Company Name:	Trackmymail
Suite/Apt. #:	
Street Address:	501 Mainstream Drive
City/State:	Nashville, NV
ZIP Code:	37228
Phone Number:	888-444-9972
Fax Number:	
Email:	customerservice@trackmymail.com

Previous | Save Changes

Three report terms

There are three terms used throughout various reports. It is important that you know and understand the difference in these three terms to best utilize the report results.

- **Scan Quantity** - this term refers to the number of pieces in one mailing that have received a scan.
- **Tracked Quantity** - this term refers to the number of mailed pieces in one mailing that are being tracked.
- **Delivery Scan Quantity** - this term refers to the number of pieces scanned and in the process of being delivered. This is the last scan before delivery.

4 Run Jobs

In this Chapter

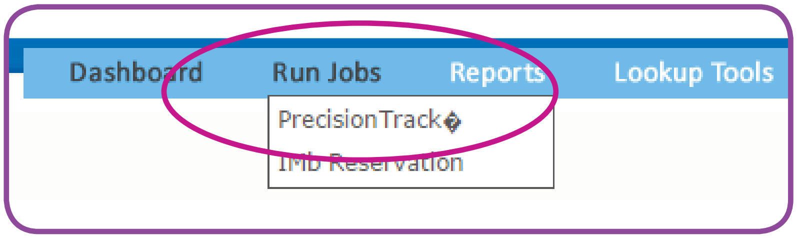
There are two options available from the drop-down **Run Jobs** tab:

PrecisionTrack - from this option, set up jobs using PrecisionTrack. Following job processing, use TrackMyMail to report on those jobs.

IMb Reservation - this functionality is not available at this time.

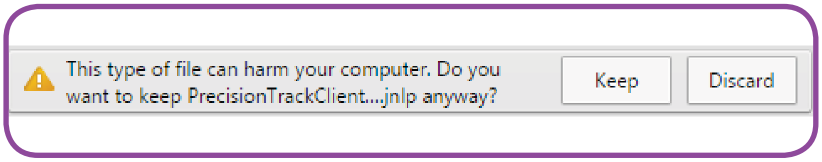
Accessing PrecisionTrack

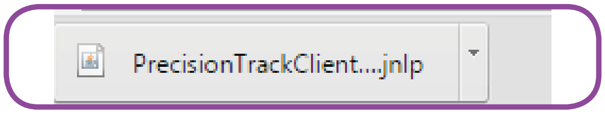
From the **Run Jobs** tab, click **PrecisionTrack**.



A message box appears asking if you want to download and open Precision-Track**.**

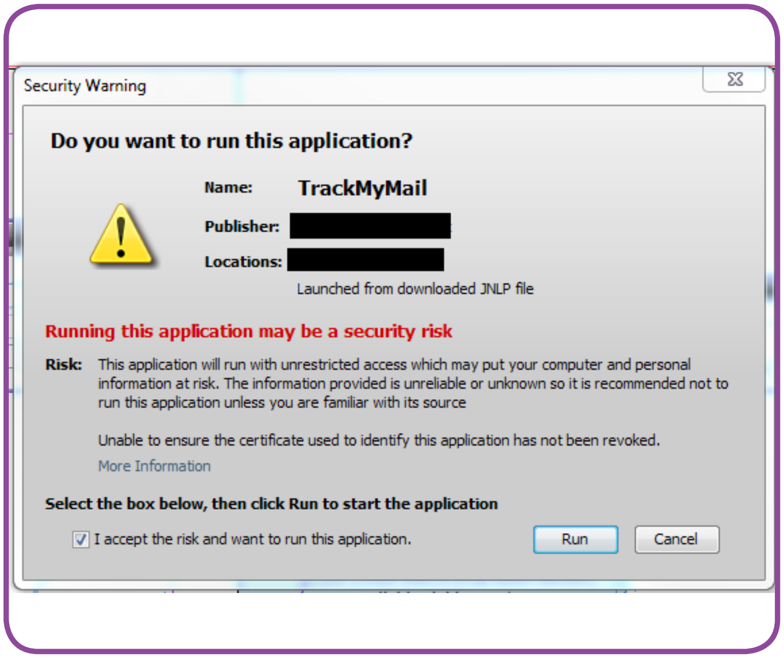
- Click **Keep** to download and open;
- Then click PrecisionTrackClient to launch the product.





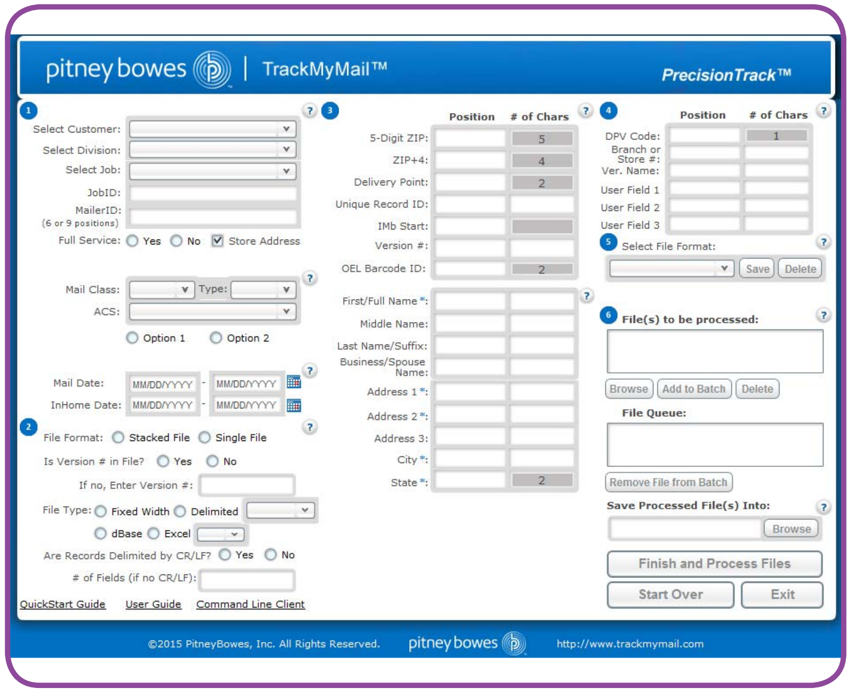
If presented with a Security Warning screen, check the acceptance, "I accept the risk and want to run this application" checkbox, then click **Run**

The PrecisionTrack screen is now accessible.



PrecisionTrack

While setting up your job, overlay screens provide additional details about the information needed in each section. Click on the question mark ("?") icons next to each section to access the information detailing that section.



Access to PrecisionTrack varies based on permissions.

The following table indicates what each login level can access in the **Customer Name** drop-down list under **Select a New Customer**. It also indicates that login level's ability to create new customers, divisions and jobs.

Access to some screens and functionality is based on permissions.

Logged In As	Customer Drop-down Availability	Division Drop-down Availability	Create New Jobs
Reseller Master	All its clients	All its Resellers' clients	Yes
Vendor Master	All its clients	All its clients	Yes
Reseller	Only itself	All its clients	Yes
Vendor	Only itself	Only itself	Yes
Client	Only itself	Only itself	Yes

Create a Job

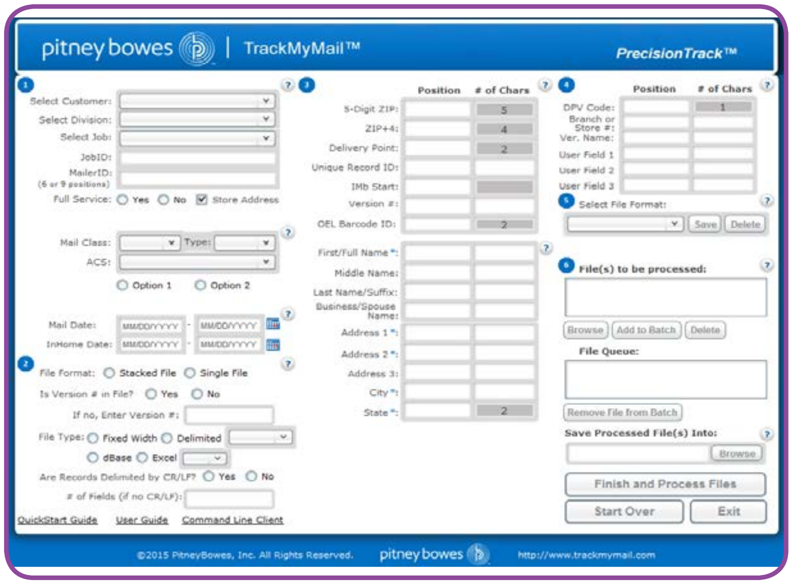
The **Run Jobs** tab provides a direct link to PrecisionTrack. PrecisionTrack, a easy-to-use interface, provides the ability to set up and process a job. The results of that job are then available through TrackMyMail where you can retrieve data associated with the jobs through various report formats, if permissions allow.

The Run Jobs screen is divided into **six** sections:

1. Job Info
2. Source File Format
3. Field Positions
4. Detailed Mailing Info
5. File Format
6. Process Files

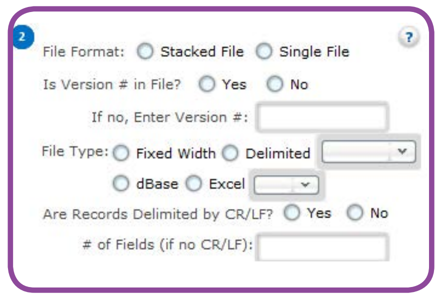
At any time, click **Start Over** to clear the screen and begin again.

Initial PrecisionTrack Screen:

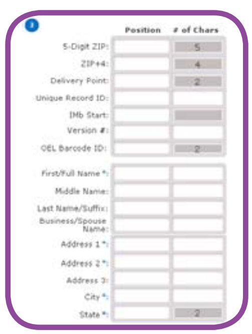


1. Job Info

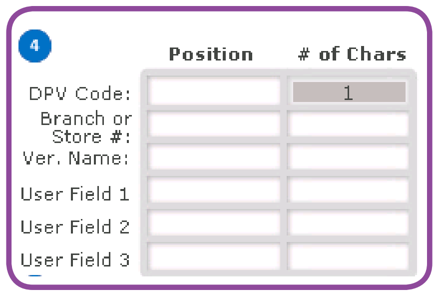
2. Source File Format



3. Field Positions

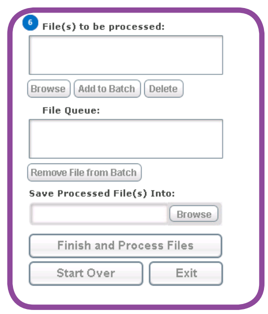


4. Detailed Mailing Info



5. File Format

6. Process Files



Job Info

In the Job Info section, information relative to the customer whose job you are submitting is collected. Details about the job itself are also collected. Based on the options chosen, additional fields are presented.

Select Customer

The **Customer Name** and **Code** are user-generated identifiers. The **Code** entered is unique. .

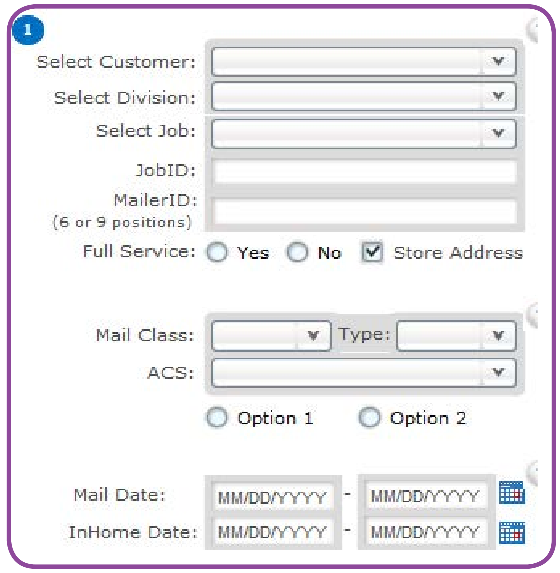
- From the drop-down list, select an existing customer name

Select Division

The **Division Name** and **Division Code** are unique, user-generated identifiers. The **Division Name** and **Division Code** provide another level of information that can be used for reporting after a job is processed.

- From the drop-down list, select an existing division name

Section 1 - Job Info

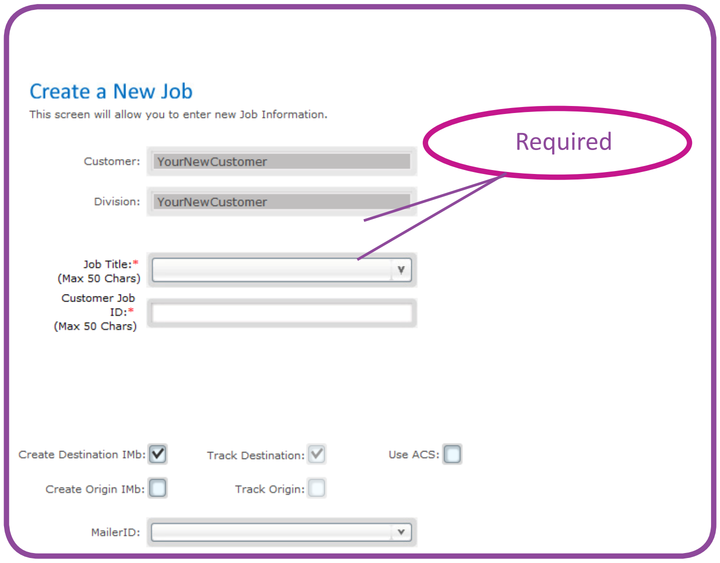


Select Job

- From the drop-down list, select an existing **Job Title**; if that job title is not available, select [Add/Edit] to add a new job title.
- If a previous job title is selected, the JobID must be change to avoid overwriting the previously run job. The same job title can be used in combination with a new JobID to create unique job.
- When adding a new Job, ***the Job Title and Customer Job ID fields are required***.

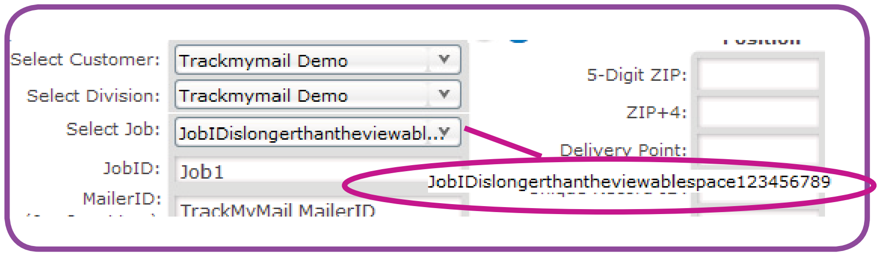
Job Title cannot exceed 50 characters. **Job Title** must be alpha numeric; special characters are not allowed.

Customer Job ID cannot exceed 50 characters.



The **Job Title AND Customer Job ID** fields combination creates a unique job

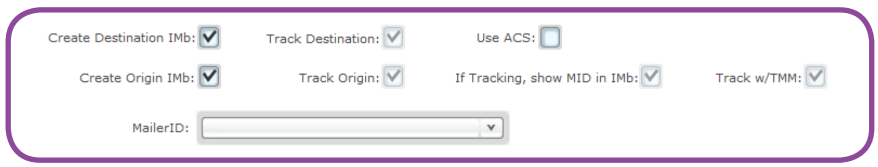
- Mouseover the **Job Name** and the **JobID** to see the entire **Job Name** or **JobID** if it is not visible in the display window.
- The **Customer Job ID**, a unique identifier that represents a mailing, is displayed on the main **Select Job** screen in the **Job ID** field after saving. To view the entire **Job ID**, hover over the **Job ID** field. This is the initiating customer's ID of the mailing and should remain unique for at least six months.



If you want TrackMyMail to track your Origin data, please make sure you have registered your Origin Routing ZIP with TrackMyMail.

Mail Tracking Options

- Choose from the various methods available for tracking your mailpieces.
- Click **Save** if new information has been added or if any fields have been updated. A pop-up message confirming that your job has been saved is a presented; click **Close**.
- Click **Close** to return to the previous screen without saving any changes to the information originally presented.



The tracking options defined:

- **Create Destination IMb** - is checked as the default; indicates that the mailpiece destination will be included in the IMb.
    - **Track Destination** - indicates mailpieces are tracked to the destination using an IMb; by default, this is checked when Create Destination IMb is used.
- **Use ACS** - indicates Address Change Service (ACS) is used; the options available are:
    - **CSR** - Change Service Requested
    - **ASR** - Address Service Requested
    - **RSR** - Return Service Requested
    - **TRSR** - Temporary Return Service Requested

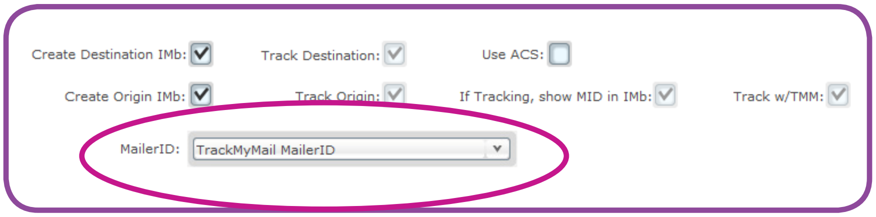
- **Create Origin IMb** - each mailpiece will have an Origin IMb, which includes the Routing ZIP for the remit piece.
    - **Track Origin** - indicates that you want the mailpiece tracked. If Track Origin is checked, the following options appear:
    - **If Tracking, show MID in IMb** - indicates the actual Mailer ID (MID) shows in the Origin IMb.
    - **Track w/TMM** - indicates TrackMyMail is tracking your mailpieces.

Destination and/or Origin tracking must be used.

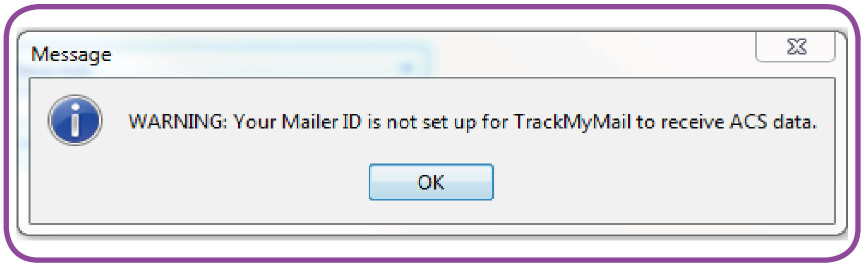
Mailer ID

The Mailer ID is a field in the Intelligent Mail barcodes used to identify Mail Owners and/or Mailing Agents. The RIBBS Web site defines the Mailer ID as a 6-digit numeric or a 9-digit numeric assigned based on annual mail volume criteria. The IDs are USPS assigned. For additional information on Mailer IDs and links to the applications, go to http://ribbs.usps.gov/index.cfm?page=intellmailmailidapp.

If TrackMyMail is providing your ACS coverage, the Mailer ID (MID) is automatically generated and the **MailerID** field is populated with **TrackMyMail MailerID.** Only one MID will be used in a job.



If you are using your own Mailer ID, it must be registered with TrackMyMail. If you've registered your Mailer ID and it doesn't appear as a drop-down option, contact TrackMyMail for assistance.



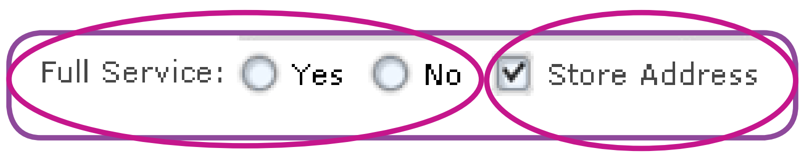
To delete a Mailer ID entered incorrectly or one that is no longer available for use, contact your TrackMyMail Administrator.

When you are finished inputting all information, click **Save** and then **Close**.

Full Service

- U.S. Postal Service approval is needed prior to using Full Service coverage through USPS .
- If you will be utilizing Full Service coverage, check **Yes** under **Full Service** and PrecisionTrack will assign the corresponding service codes. Otherwise, check **No.**

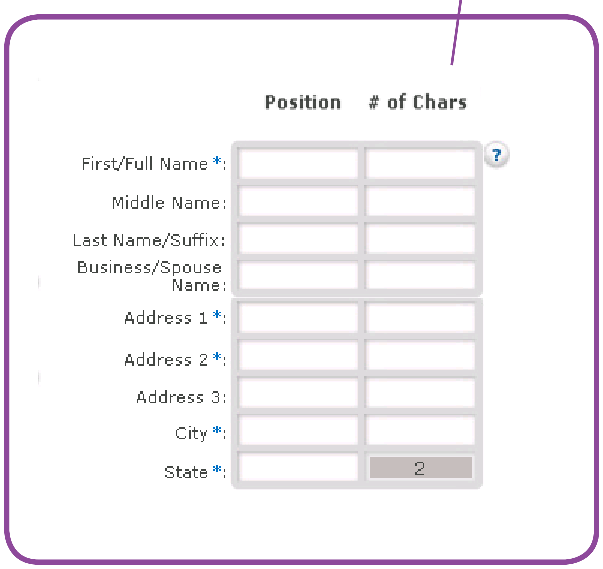
The USPS's core belief is that the adoption of the Intelligent Mail barcode, more specifically the adoption of the Full Service IMb, will provide the most benefit to both mailers and the USPS. By using the Full Service IMb, the USPS can fully track a mailpiece through the entire postal network, providing valuable data to mailers and better manage and optimize production. The changes that affect mailers were made to incentivize and increase rates to go to Full Service IMbs. Mailer using Full Service IMbs get an increased discount, can request free Full Service ACS data and can get free IMb Tracing..



Store Address

- Check the **Store Address** box to have PrecisionTrack retain the address data submitted in your job. This information is used in TrackMyMail reporting. If you do not supply **Name and Address** information, you are limited on the fields you can use in TrackMyMail for single-piece lookup.
- If you opt to save names and addresses, enter positions for the following fields. The **Store Address** information is collected below the **Field Positions** (Section 3 on the Main Screen). To ensure the best search results, provide as complete information as possible in all fields.

The "# of Chars" column is displayed when your input File Type is Fixed Width.



These are the fields presented for storing names and addresses from the input file: PrecisionTrack retains your data for use in TrackMyMail reporting.

First/Full Name

- ***This is a required field*** indicating the starting position in your input file of the **First/Full Name**.
- If your input file is delimited/dBase/ Excel, no additional information is needed.
- If your input file is fixed width, indicate the number of characters contained in this field.
- If your input file has the full name in one field, enter the starting position under **First/Full Name**. If your input file has separate entries for first, middle and last names, use the **Middle Name** and **Last Name/Suffix** fields in addition to the **First/Full Name** field.
- Comma quote delimited files are accepted. All quotation marks with the exception of the first and last count as characters.

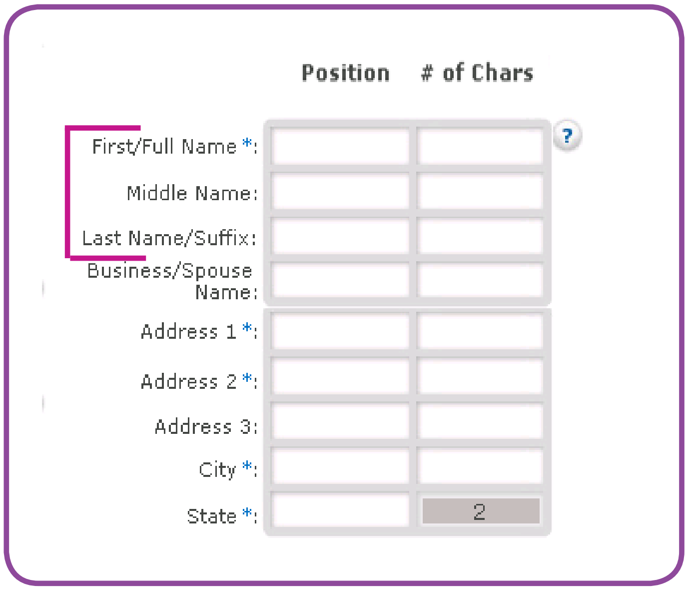
Middle Name

- Indicate the starting position in your input file of the **Middle Name.**
- If your input file is delimited/dBase/ Excel, no additional information is needed.
- If your input file is fixed width, indicate the number of characters contained in this field.

Last Name/Suffix

- Indicate the starting position in your input file of the **Last Name/Suffix**.
- If your input file is delimited/dBase/ Excel, no additional information is needed.
- If your input file is fixed width, indicate the number of characters contained in this field. In the name fields, identifiers, such as Sr., Jr. or III, should be included in the **Last Name/Suffix** field.

If you are using a previously saved **File Format** or one of the six standard formats provided, these fields are automatically populated based on the selected format.



First/Full Name, **Middle Name** and **Last Name/Suffix** combined cannot exceed 60 characters. Spaces between names are considered characters. Example: Ann K Smith is an 11-character entry.

Examples of input entries

Information one entry in input file:
First/Full Name: John David Smith Jr.
Middle Name (if applicable):
Last Name/Suffix (if applicable):

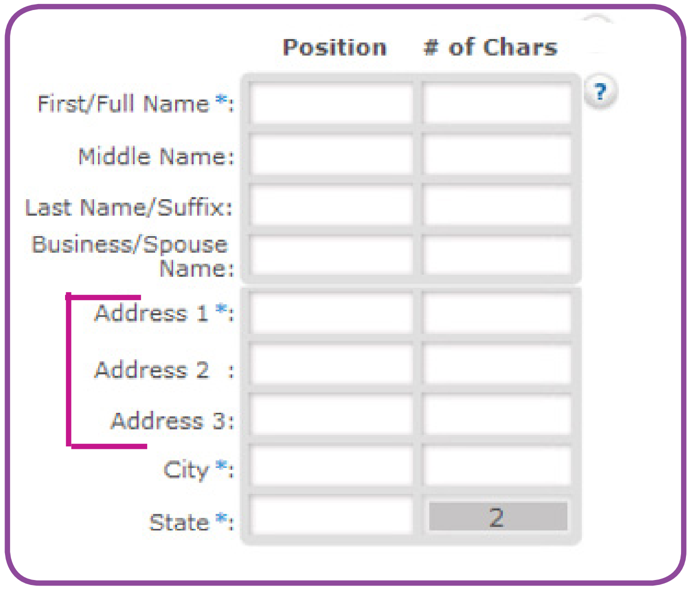
Information three separate entries in input file:
First/Full Name: John
Middle Name: David
Last Name/Suffix: Smith Jr.

Comma quote delimited entry in input file:
“Ann”,”K”,”Smith” is a 15-character entry.

Business/Spouse Name

- Indicate the starting position in your input file of the **Business/ Spouse Name.**
- If your input file is delimited/ dBase/Excel, no additional information is needed.
- If your input file is fixed width, indicate the number of characters contained in this field.

Business/Spouse Name cannot exceed 60 characters..



Address 1

- ***This is a required field*** indicating the starting position in your input file of **Address 1**.
- If your input file is delimited/ dBase/Excel, no additional information is needed.
- If your input file is fixed width, indicate the number of characters contained in this field.

Address 1 is required while **Address 2** and **Address 3** are optional. It is important to capture the most accurate information possible in the **Address 1** field.

Address 1 cannot exceed 50 characters.

Address 2

- Indicate the starting position in your input file of **Address 2**.
- If your input file is delimited/ dBase/Excel, no additional information is needed.
- If your input file is fixed width, indicate the number of characters contained in this field.

Address 2 cannot exceed 50 characters.

Address 3

- Indicate the starting position in your input file of **Address 3**.
- If your input file is delimited/ dBase/Excel, no additional information is needed.
- If your input file is fixed width, indicate the number of characters contained in this field.

Address 3 cannot exceed 50 characters.

City

- ***This is a required field*** indicating the starting position in your input file of the **City**.
- If your input file is delimited/dBase/Excel, no additional information is needed.
- If your input file is fixed width, indicate the number of characters contained in this field.

State

- ***This is a required field*** indicating the starting position in your input file of the **State**.
- If your input file is delimited/dBase/Excel, no additional information is needed.
- If your input file is fixed width, the number of characters in this field **defaults to two (2)**.

Origin IMb

- Select the type of reply mail to be used. Options are:
  - **QBRM/BRM** - Qualified Business Reply Mail/Business Reply Mail
  - **CRM** - Courtesy Reply Mail

Mail Class

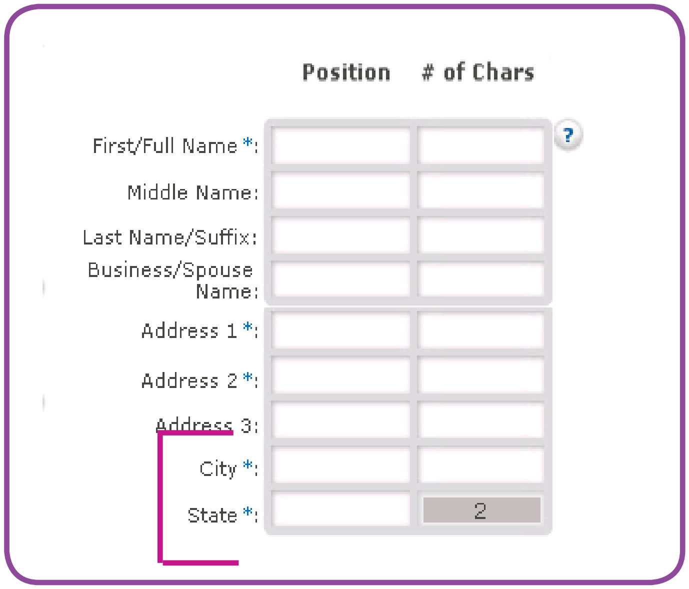
- Select the mail class to be used. Options are:

  1st Class
  Standard
  Periodicals
  Packages

Type

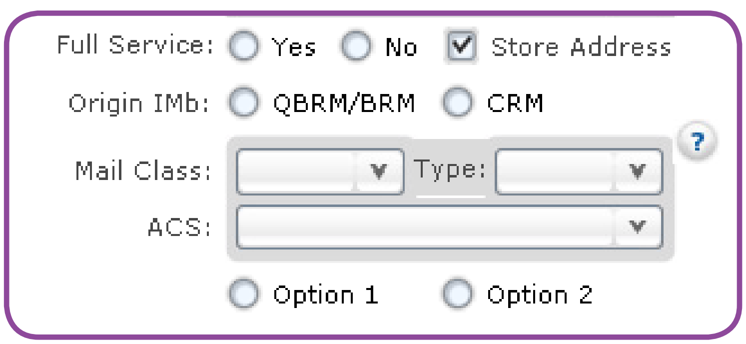
- Select the mail type being used. Options are:

  Letters
  Flats
  Postcards
  Bound Printed Matter



City cannot exceed 30 characters.

State cannot exceed two characters.



All classes of mail must be processed separately.

Address Change Service (ACS)

- If **ACS** is being used, from the drop-down list, select the type of ACS to be used. Options are:

  Change Service Requested (CSR)
  Address Service Requested (ASR)
  Return Service Requested (RSR)
  Temporary Return Service Requested (TRSR)

- Click the radio button indicating **Option 1** or **Option 2** is to be used. Options are presented based on MID set up with the USPS or the TrackMyMail MID being used.

This table provides a breakdown of **Options 1 and 2** for the Address Change Service available services.

*ACS Types with **Options 1 and 2** services*

Service being used:	Options available:
CSR	**Option 1:** All Undeliverable as Addressed (UAA) mail is disposed; electronic notice is provided; **Option 2:** Pieces forwarded as possible; all other disposed; electronic notice is provided for all; **Standard Mail has fee for forwarded mail**. **Note:** Option 2 is not currently available.
ASR	**Option 1:** Forwards if possible; returns mail if not able to forward; manual or electronic notice on **forwarded pieces only**; **Standard Mail has weighted fee for returned Standard Mail**; **Option 2:** Forwards if possible; returns mail if not able to forward; electronic notice for either; **Standard Mail has weighted fee for returned Standard Mail.**
RSR	**Option 1:** Not available; **Option 2:** All UAA mail returned to sender; First-Class pieces returned at no charge; Standard Mail returned at single piece rate; electronic notice provided for all.
TRSR	**TRSR is only available for First-Class Mail.** **Option 1:** Not available; **Option 2:** Permanent Change of Address (COA) mail returned to sender at no charge; electronic notice provided; temporary COA is forwarded.

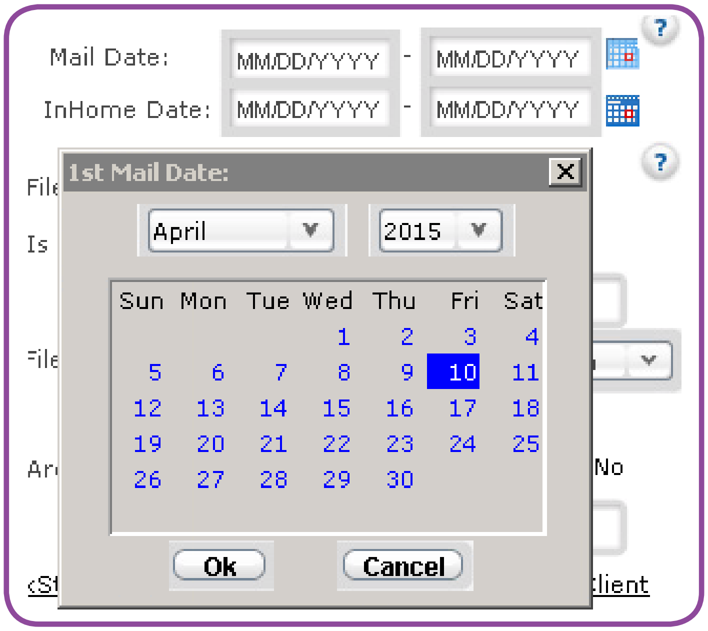
Mail Dates

- ***These are required fields*** indicating the first mail date, earliest date your mailing could occur, and the last mail date of your mailing.
- If your last mail date spans multiple days, enter the last possible mail date; otherwise, the program will default to first mail date.
- Both dates must be entered in the MM/DD/YYYY format.

InHome Date

- These are optional fields indicating the earliest date InHome delivery could occur, and the latest date InHome delivery could occur.
- Both dates must be entered in the MM/DD/YYYY format.
- If no date is entered, the default InHome range for that mail class is applied to the job:
  - First-Class - 1-3 days
  - Standard - 7-10 days

*Use the drop-down calendar to choose a first and last **Mail Dates** and **In-Home Dates***



The 1st Mail Date cannot be more than 14 days earlier than the current date. The Last Mail Date cannot be more than 60 days after the current date.

Source File Format

The **Source File Format** section of PrecisionTrack requires you to provide information regarding the input data.

File Format

- Indicate the type of file format being used: stacked file or single file.

  Stacked File contains multiple/ cells/versions in one file while a **Single File** contains one cell/ver-sion in the file.

Is Version # in File?

- Click **Yes** if the **Version Number** is included in your input file.
- If the **Version Number** is not included in the input file, click **No** and manually enter the **Version Number** where requested.
- The **Version Number** enables you to identify your version/cell. You must have a **Version Number** captured for the job to run. Version numbers must be unique within a job.
- A **Version Number** identifies specific categories of clients/ customers for reporting purposes. Example: On your input list, you have made the following identifications:

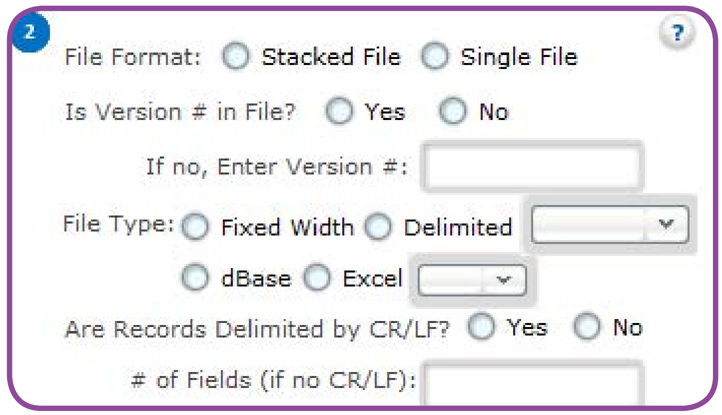
  A = customers who purchase from you regularly

  B = customers who you think may purchase based on data collected

  C = customers who have not purchased from you in the past five years

  These codes allow you to track activity on all three types of accounts.

Section 2 - Source File Format



If a file is run with the same **Version Number** as a previously run file within the same job, the previous data will be overwritten.

File Type

- Indicate if your **File Type** is fixed width, delimited, dBase or Excel by checking the appropriate radio button.
- If delimited, choose a delimiter from the drop-down box or enter a character in the delimiter box.
- If Excel, choose either .xls (Excel 2003 or earlier) or .xlsx (Excel 2007) from the drop-down box
- If using Excel as your file type, the following specifications apply:

  Files must be .xls or .xlsx; no other versions are supported.

  Check that special fields do not have leading zeros suppressed; this applies to fields such as ZIP Codes beginning with “0”; example 01234 becomes 1234 when the “0” is suppressed by Excel.

  Refrain from embedding macros/ formulas into your input file; results may be unpredictable if your Excel files contain macros/formulas.

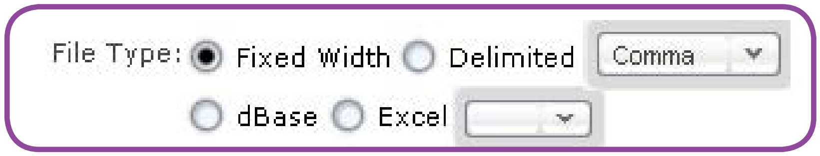
  Cells should be formatted as “text.”

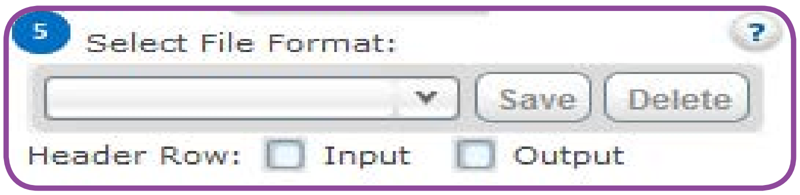
- If delimited or Excel is chosen as the **File Type** , the line “Header Row” appears under the Select **File Format** (Section 5) box.
- Check the **Input** box if your file contains a header row and PrecisionTrack will not read the first record of your input file.
- Check the **Output** box if you want the same header row that is on your input file to appear on your output file.
- There must be a header row on your input file in order to have a header row appear on your output file.

Delimited indicates delimited by field not record.

dBase files need to have the PrecisionTrack input field identified as character string fields.

Delimited indicates delimited by field not record.

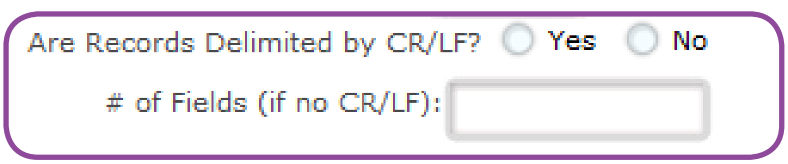




If **Output** is selected, the header row on your output file is the same as the header row that appears on your input file.

Are Records Delimited by CR/LF?

Indicate whether your records in the input file are delimited by carriage return line feed (CR/LF). Indicate the record length if your file is fixed width and not delimited by CR/LF.



Field Positions

5-Digit ZIP

- Indicates the starting position in your input file of the 5-Digit ZIP.
- If your input file is delimited/dBase/Excel, no additional information is needed.
- If your input file is fixed width, the number of characters contained in this field **defaults to five** (5).

ZIP+4

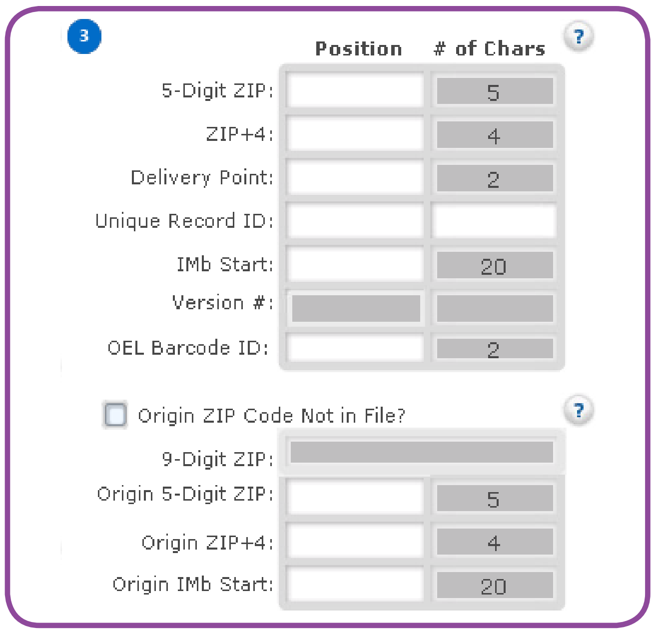
- Indicates the starting position in your input file of the ZIP+4.
- If your input file is delimited/dBase/Excel, no additional information is needed.
- If your input file is delimited/dBase/Excel and your ZIP+4 is in the same field as your 5-Digit ZIP, enter that same field position here.
- This field can contain only numeric values; alpha characters and symbols are not allowed.
- If your input file is fixed width, the number of characters contained in this field **defaults to four (4)**.

Delivery Point

- Indicates the starting position in your input file of the Delivery Point.
- If your input file is delimited/dBase/Excel, no additional information is needed.
- If your input file is delimited/dBase/Excel and your Delivery Point is in the same field as your ZIP+4, enter that same field position here.
- This field can contain only numeric values; alpha characters and symbols are not allowed.
- If your input file is fixed width, the number of characters contained in this field **defaults to two (2)**.

Section 3 - Field Positions

If you are using a previously saved **File Format** or one of the six standard formats provided, these fields are automatically populated based on the selected format.



For delimited/dBase/Excel files, if any or all of the following, **5-Digit ZIP**, **ZIP+4** and **Delivery Point** are in the same field, then enter the same field number in the text boxes.

Unique Record ID

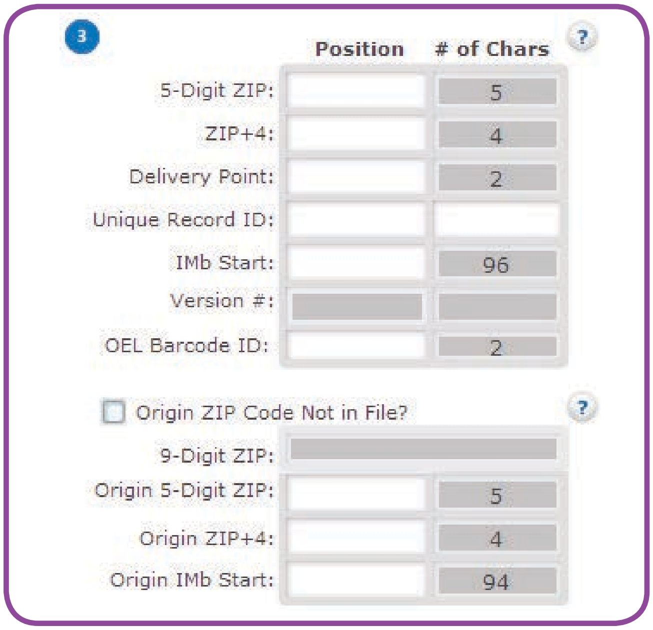
- Indicates the starting position in your input file of the **Unique Record ID**.
- For some clients, the **Unique Record ID** is referred to as a Customer Unique ID (CUID).
- If your input file is delimited/dBase/Excel, no additional information is needed.
- If your input file is fixed width, you need to indicate the number of characters contained in this field.

IMb Start

- Indicates where you want the starting position of the IMb to be in **your output file**.
- If your input file is delimited/dBase/Excel, the IMb starting position must be placed at the end of the record.
- If your input file is fixed width and the IMb starting position is not at the end of the record, you must have the appropriate positions available within the record for this field for the 31-digit numeric string and the 65-digit alpha string.
- If your input file is fixed width, the number of characters contained in this field **defaults to 96**.
- If your job is set up as Origin Only, the **IMb Start** position is grayed out and is not considered a required field.

Unique Record ID cannot exceed 25 characters.

The **Unique Record ID** identifies the mailpiece to which it is assigned. It can be used in the Single Piece Lookup reporting feature in TrackMyMail. The **Unique Record ID** must be available if you are using TrackMyMail to track ACS data.



The IMb Start position may not overlap with any other field when supplying field positions.

Version

- Indicates the starting position in your input file of the **Version #**.
- If your input file is delimited/dBase/Excel, no additional information is needed.
- If your input file is fixed width, indicate the number of characters contained in this field.

OEL Barcode ID

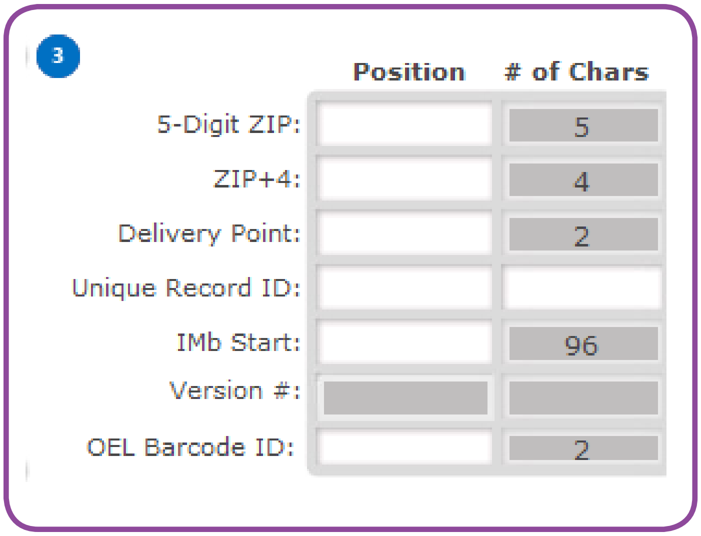
- When processing **Flats**, the Optional Endorsement Line (OEL) Barcode ID field is presented.
- If your input file is fixed width, the number of characters contained in this field **defaults to two (2)**.
- For Standard Class Flats utilizing ACS Full Service and a presort endorsement line, Full Service will not fulfill ACS records on the Carrier route pieces.
- The Service Type ID (STID) must be changed on these records to reflect Basic Service.
- If using ACS on STD Flat mail with Full Service, the mail file needs to be presorted prior to running PrecisionTrack in order to capture the OEL barcode and assign the correct STID.
- In PrecisionTrack the Barcode ID field is captured. When the Barcode ID is “10”, indicating Car-rte (Carrier route), PrecisionTrack appends a Basic STID to those pieces. This results in the ACS records being fulfilled out of OneCode ACS.

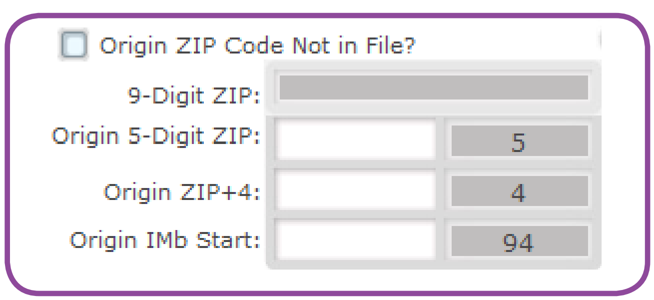
Origin ZIP Code Not in File?

- Use the checkbox to indicate if the **Origin ZIP Code** is included in the input file.
- Unchecked indicates the **Origin ZIP Code** is included in the input file. Provide the Origin 5-Digit ZIP, Origin ZIP+4 and Origin IMb Start.
- Checked indicates the **Origin ZIP Code** is NOT included in the input file. Provide the 9-Digit ZIP and Origin IMb Start position.

Version # cannot exceed 20 characters and must be unique within a job

The **Version #** must be in your input file if running a stacked file or a single file where the **Version #** was not manually entered.





Detailed Mailing Info (Optional)

DPV Code

- Indicates the starting position in your input file of the **DPV (Delivery Point Validation) Code**.
- If your input file is delimited/dBase/Excel, no additional information is needed.
- If your input file is fixed width, the number of characters contained in this field **defaults to one (1)**.
- This one-digit code comes from CASS processing and is one of the following:
  - Y - when standardized and DPV confirmed all components;
  - N - when standardized but NOT DPV confirmed;
  - S - when standardized and DPV confirmed for primary number only (secondary number not con-firmed);
  - D - when standardized as a default ZIP+4 record;
  - Blank - when the address is not ZIP+4 coded.

While this is optional information, the DPV Code provides access to pos-sible future reports in TrackMyMail.

Branch or Store

- Indicates the starting position in your input file of the **Branch or Store Number**.
- If your input file is delimited/dBase/Excel, no additional information is needed.
- If your input file is fixed width, indicate the number of characters contained in this field.

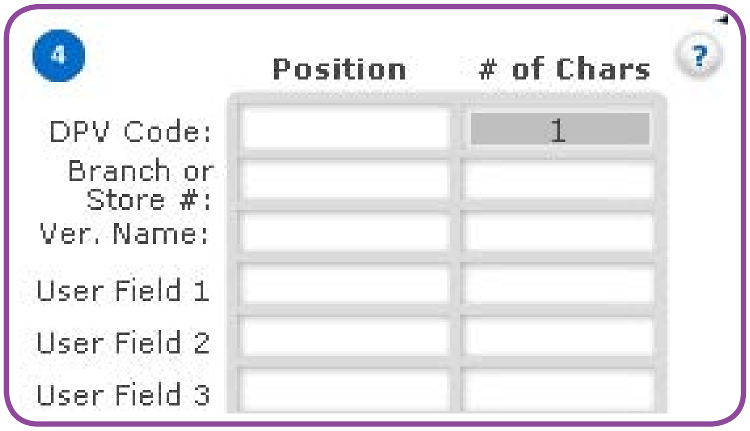
While this is optional information, by providing an optional code in these fields, some reports may be created to perform groupings or break out sub-totals on custom reports in TrackMyMail.

Section 4 - Detailed Mailing Info

The Detailed Mailing Info section of PrecisionTrack captures optional fields within the input file. While providing this information is optional, the information allows access to possible future reports.

Following is a breakdown of the optional information needed in this section.

DPV Code cannot exceed one character. This applies to all file formats.



Branch or Store # cannot exceed 20 character

Ver. Name

- Indicates the starting position in your input file of the **Version Name**.
- If your input file is delimited/ dBase/Excel, no additional information is needed.
- If your input file is fixed width, indicate the number of characters contained in this field.
- The **Version Name** is a more detailed description that correlates to your **Version #**.

User Field 1

- Optional user-defined field. Use this field to provide additional information about your job such as territory or region data.

User Field 2

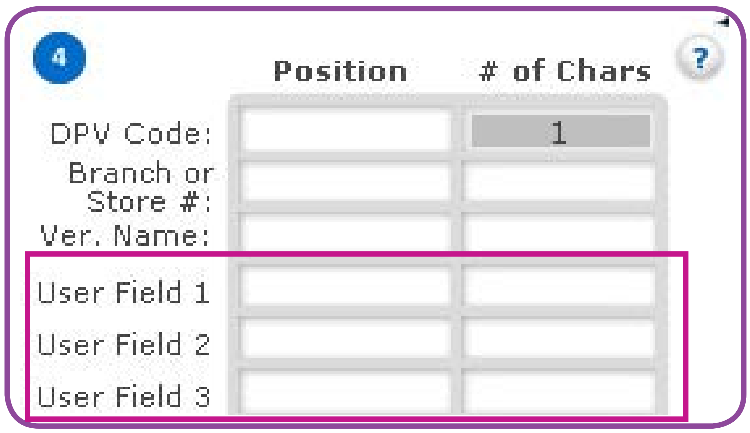
- Optional user-defined field. See User Field 1 above for additional information.

User Field 3

- Optional user-defined field. See User Field 1 above for additional information.

Version Name cannot exceed 50 characters.

If you are using a previously saved **File Format**, these fields may be automatically populated based on the selected format.



User Field 1 cannot exceed 80 characters.

User Field 2 cannot exceed 80 characters.

User Field 3 cannot exceed 80 characters.

File Format

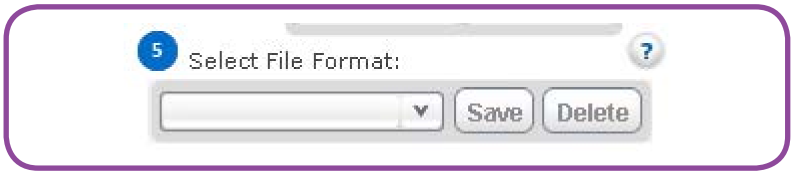
- Select an existing **File Format** form from the drop-down list.
- To create a new format, select **New** from the drop down list and enter your new **File Format** name in the text box, then click **Save.**
- To delete an existing **File Format**, select the file format from the drop-down list and click **Delete**

Please note that no confirmation message is presented prior to deleting a File Format. Once delete is clicked, a message appears confirming the format has been delete.

The six standard file formats available cannot be changed and saved as the same names. These formats can be edited and saved under new names.

Section 5 - File Format

The File Format section of PrecisionTrack provides the ability for you to name and save the file information entered for future use. A repetitive file format can be set up and saved then simply recalled when needed using the drop-down list. Standard in-house formats can be set up one time and saved for each recall and use.



A File Format is only available to the user who created it.

From the **File Format** drop-down list, you have the option to choose one of six standard formats. These formats can be changed and saved using a new name if needed; the standard format cannot be changed using the existing name. The standard formats are:

- PrecisionTrack (CSV)
- PrecisionTrack (Tab)
- TIB Inbound Only (CSV)
- TIB Inbound Only (Tab)
- TIB Round Trip (CSV)
- TIB Round Trip (Tab)

Process Files

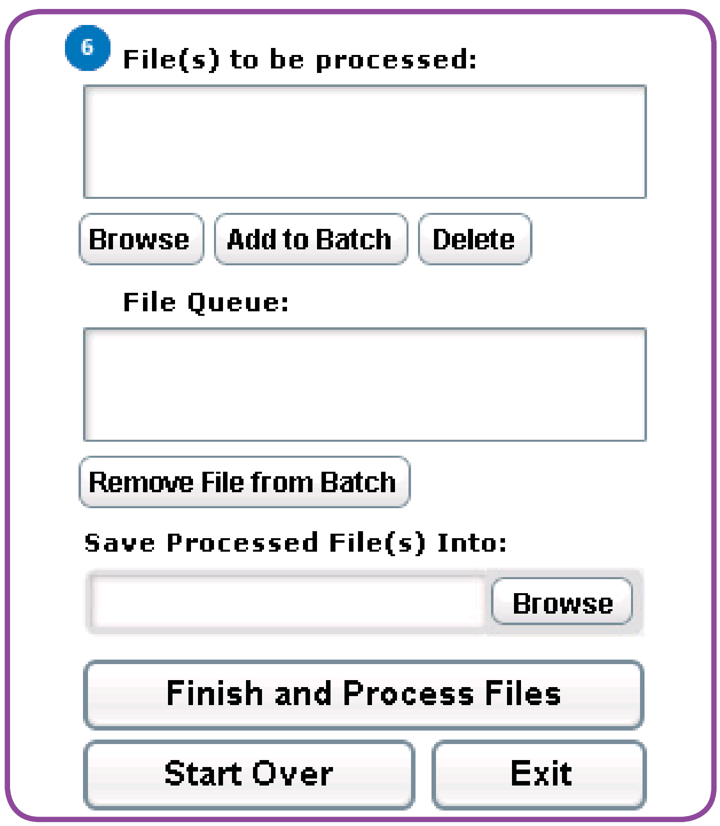
- Click the **Browse** button and select the appropriate files to be processed.
- When you have finished selecting files, highlight the file(s) to add to the **File Queue** and click **Add to Batch**.
- Click the **Delete** button to remove a file from the **File(s) to be processed** list.
- After a file has been added to the **File Queue**, it can be removed by highlighting the file name and clicking **Remove File from Batch**.
- Use the **Browse** button in the **Save Processed File(s) Into** section to indicate where you want your results to be stored.
- You must click **Finish and Process Files** for your job to be submitted for processing.
- Click **Start Over** to clear all information from the screen and start setting up a new job.
- Click **Exit** to exit the application.

Section 6 - Process Files

In the Process Files section of PrecisionTrack, specify the file(s) to add to the queue. Files chosen will be shown in the **File(s) to be processed** box. PrecisionTrack can run multiple files in different formats. File lengths and locations do not have to be the same for files to run simultaneously.

Names of the **File(s) to be processed** may not contain special characters. Only alpha and numeric values are accepted. If a file name contains special characters, the user receives an error when attempting to add the file to batch.

File name cannot exceed 80 characters.



Your job set up has been completed and the job sent for processing. Here is a sample of the email confirmation you receive when the job you submitted has completed processing. A copy of the email is also included in a log file with the output file.

Sample Confirmation Email

From: tmm@pb.com
Sent: Tuesday, August 25, 2015 12:04 PM
To: PrecisionTrak; TMM
Subject: Notification: ExceltestfileNH_ MoreData_17450_120341683

TMM, MHReseller

TrackMyMail 3.8.0, Job Title: MHInboundOnlyJob; First Class Letters, MailerId: 000874, Service Type ID: 050, Origin IMb: 13 (numeric) & 14 (alpha), CSR, Full Service.

1 Version(s) Processed on 08/25/2015, 10 total records.
File Name: ExceltestfileNH_ MoreData_17450_120341683.coded.xls.

Service Type: Unique Encoding.

2; TMM Tracked Origin Qty: 10; Mail Qty: 10.

Origin IMb range: 000059348-000059357

Warning - Invalid postnet found at input record(s): 1,2,3,4,5,6,7,8,9,10.

Listed below, please find all versions that were associated to this job prior to this processing. If you have just processed a version # that is also listed below, then you will have overwritten the original one. Only the new version will be active in our system. (NOTE: After you have processed a file, it will take our system a few minutes to import that file and include in the list of existing versions, so all previous versions may not show up right away).

Version # 1; TMM Tracked Qty = 10; Mail qty = 10.
Version # 2; TMM Tracked Qty = 10; Mail qty = 10.

When using the Origin IMb, the ZIP Code is included in the Numeric String in the output file.

The numeric string provided in the report is based on the input information. The entire IMb including delivery information is provided whether that is five, nine or eleven digits. So the numeric value of the outbound IMbs returned could be 24, 29 or 31 digits. The alpha string is always 65 characters.

Sample Output File

Below is a sample of the IMb information in the output file:

Numeric String	Alpha String
000400000486137412099	DFDFAFATTDTTTFTFDTDFDDDDFFTTTATATAFFFADFATATADFFDFFFTFFFFTTDDAAFF
000400000486137412100	ADFDAAFDDFTATTAAATTATDDADDDTFATFDDAFTDDDTDTDDTFAAADADFDFDFATAFFAF
000400000486137412101	DDTFDAAATTTADTAAAFATDFFDAFDFTATFDFFDDTTDAFAFDFDFFTAFDDAADFDTAFDFD
007000000486137412102	ADFTDAFATDTADFDAFTFATDFDFDDAFAAATFTAADTDTAFFDATATFDATFFFDDFADFDFD
000400000486137412103	TDAADTFDFFTAFTFTATFTFTDTDFTDATDADDTAAADTADTFFTDDFATTFFTTDFFFDFDDT
003000000486137412104	TTFTFTDFFDTADDFADFFADATFTFTFDDFDFDAADAFADDATTDDADFTATTFFDTDFTFADA
003000000486137412105	TTDATDFFFDTAFFDAFDFDAFADFAAFFAATFFDDDFFATDDAADFFDAFTFDFAATFATDTDF
007000000486137412106	FAAATFDTFFAFTTDDAFAADAAFFAATFAFDFATTTAADDFAFATTADTDAFDTFTDTFFTDAF
003000000486137412107	TAAATDAAADDFFTFDFDADFFATDATTAADTTTFDFTADTDDFDFDDTFDTFTATAAFTTTFAF

When a job has processed successfully, you will receive two files:

- One .coded file - this is the encoded file that contains the IMbs.
- One .log file this is the process log file that contains identical information to the email notification that is sent when a job is processed. Naming convention is identical to the .tmm file but the file extension is different.

If an error occurs during processing and the file processing is not completed, you receive only the last .log file, which will contain the process progress information and the error that occurred within the process.

The **CustomerID** in the name of the files is internal to PrecisionTrack and is not reflective of any data you entered into PrecisionTrack.

Definition and example of the two files received when a job successfully processes:

- (1) .tmm file - this is the encoded file that contains the IMbs.

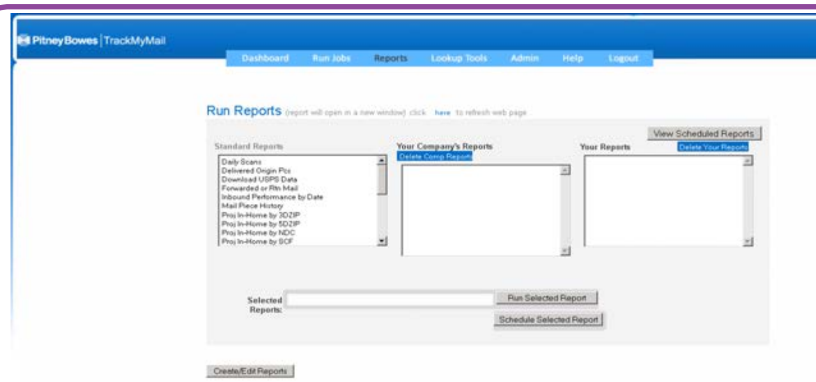
Example: **TMMTESTFILE_1499_105806965.coded**; content breakdown by color is **FileName_CustomerID_Time.coded** (Note: time format is hour, minute, second, millisecond)

- (1) .log file - this is the processing log file containing identical information to the email notification sent when a job is processed. Naming convention is identical to the .coded file but the file extension is different:

Example: **TMMTESTFILE_1499_105806965.log**; content breakdown by color is **FileName_CustomerID_Time.log** (Note: time format is hour, minute, second, millisecond)

5 *Reports*

In this Chapter



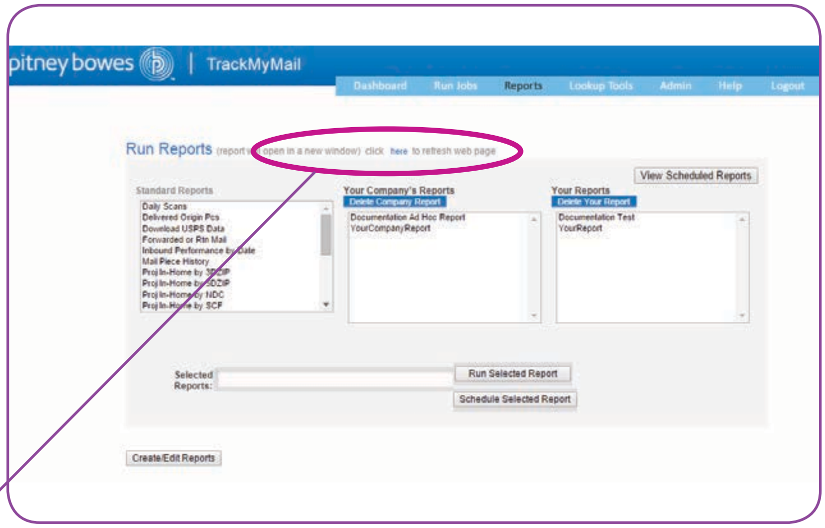
*From the **Reports** tab, access your data in statistical or graphical formats. Use TrackMyMail's standard reports or create your own custom report using **Create/Edit Reports**. Save reports in **Your Company's Reports** to allow access by others in the company or save to **Your Reports** where only the user associated with this login can access the reports.*

Reports can also be run immediately or scheduled to run at a later date or on a recurring basis.

From the *Reports* tab, use standard reports or create your own ad hoc reports. The **Run Reports** section of TrackMyMail provides four options:

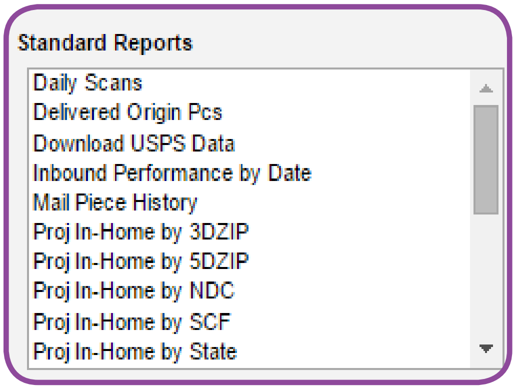
- **Standard Reports** – TrackMyMail already created reports
- **Your Company's Reports** – reports shared within your company
- **Your Reports** – customized reports for your viewing only
- **Create/Edit Reports** – new/ad hoc reports created by you and saved in **Your Company's Report** or **Your Reports**

All reports open in a new window. To avoid timing out, click the "here" link, located next to Run Reports, and refresh the Web page.



Standard Reports

Use the scroll bar to view all available **Standard Reports**. **Standard Reports** contain predefined report parameters.



From the list, select the **Standard Report** to be run. The report chosen will appear in the **Selected Reports** text box. Click **Run Selected Report** to run the report immediately or **Schedule Selected Report** to run the report at a later date/time.

Running reports and scheduling reports are covered in the Running and Scheduling Reports section of this guide.

The available Standard Reports include:

- Daily Scans
- Delivered Origin Pcs
- Download USPS Data
- Inbound Performance by Date
- Mailpiece History
- Proj In-Home by 3DZIP
- Proj InHome by 5DZIP
- Proj InHome by NDC
- Proj InHome by SCF
- Proj InHome by State
- Proj InHome by User1
- Redirected Mail
- Results by USPS Area
- Update Pro
- View Results by Date
- View Results by NDC
- View Results by SCR
- View Results by State
- View Results by User 1
- View Results by User 2
- View Results by ZIP

Your Company's Reports and Your Reports

Your Company's Reports are custom reports created and used by your company's users. Reports saved in this category are available to anyone in your company provided access at this level for viewing and editing. Reports available through Y**our Company's Reports** are created using **Create/Edit Reports**.

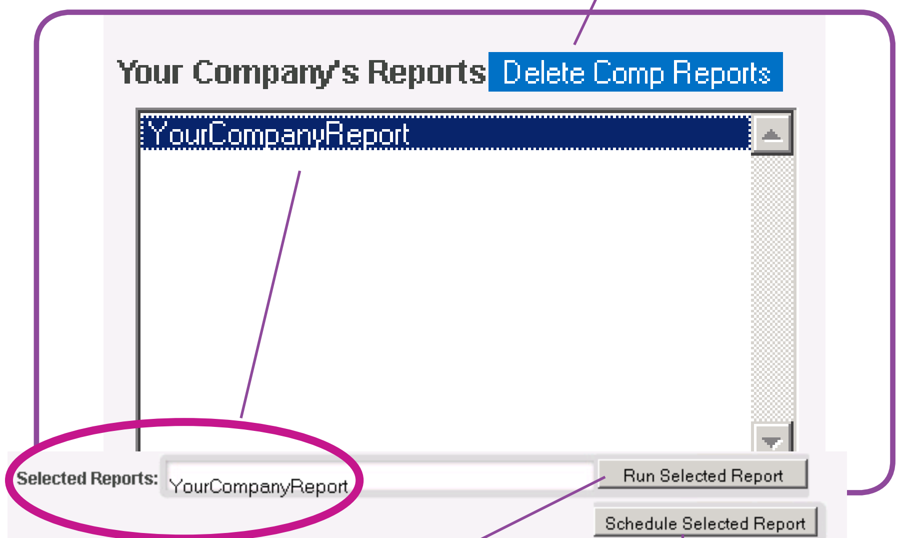
Your Reports are custom reports created by and available to only the individual running the report. Reports saved in this category are unavailable to anyone else in the company. Reports available through **Your Reports** are created using Create/Edit Reports.

From the list of **Your Company's Reports** or **Your Reports**, select a report. The report chosen will appear in the **Selected Reports** text box.

- Three action options are available for the selected report
  - **Run Selected Report**
  - **Schedule Selected Report**
  - **Delete Company Report**
- Click **Run Selected Report** to run the report immediately or **Schedule Selected Report** to run the report at a later date/time.
- Using **Schedule Selected Report**, reports can also be scheduled to run on a recurring basis.
- Running reports and scheduling reports are covered in the **Running and Scheduling Reports** section of this guide.

Saving reports at the **Your Company's Reports** level is permission based.

Delete Company Report deletes the selected report from TrackMyMail.

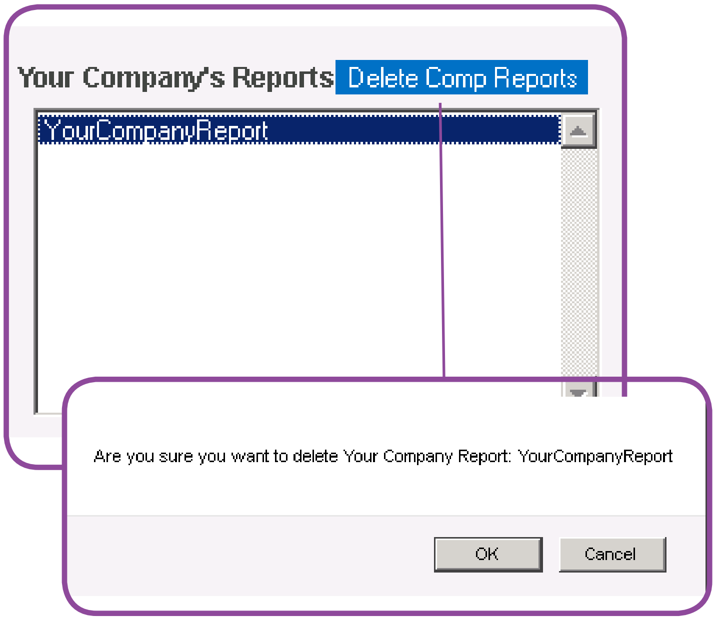


Click **Run Selected Report** to run the report immediately

Click **Schedule Selected Report** to run the report at a later date/time. Using **Schedule Selected Report**, reports can also be scheduled to run on a recurring basis.

- You can delete any report from **Your Company's Reports** by selecting the report to be deleted and clicking **Delete Company Report**.
- You can delete any report from **Your Reports** by selecting the report to be deleted and clicking **Delete Your Report**.
- A confirmation window appears asking "Are you sure you want to delete Report: 'Your Company's Report or Your Report Name'?" Click **OK** to delete the report or **Cancel** to keep the report.

Add new reports to **Your Company's Reports** or **Your Reports** using **Create/Edit Reports**. Details for creating and saving a new report are covered in the **Create/Edit Reports** section of this guide.



*Using the Delete Comp Report, click **OK** to delete the selected report or **Cancel** to keep the selected report.*

Create/Edit Reports (Ad Hoc Reports)

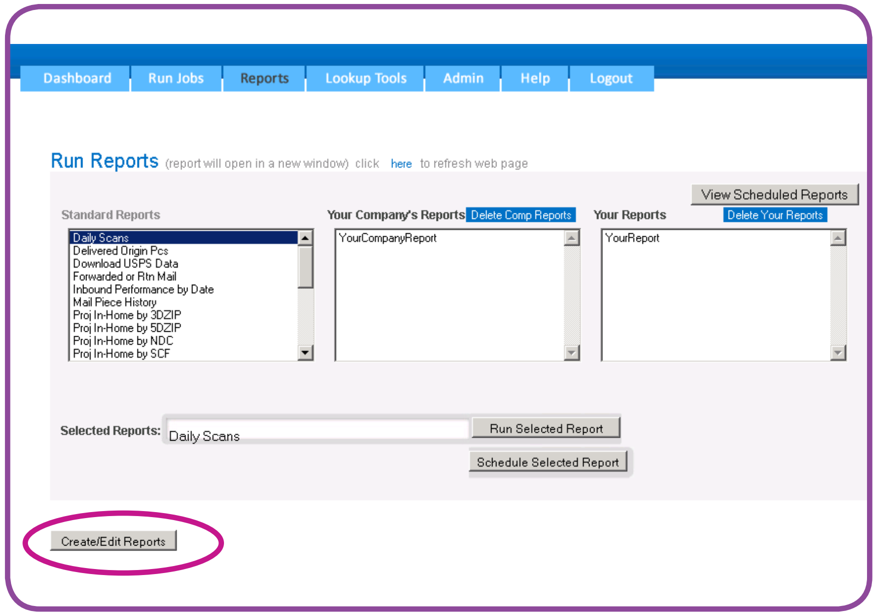
All reports created in **Create/Edit Reports** are saved to either **Your Company's Reports** (public) or **Your Reports** (private).

- Click **Create/Edit Reports** to begin creating your report. Using the template provided, create new reports to be used and saved.
- The **Select Display Fields** section is required. The remaining optional sections can be completed to further define your report.

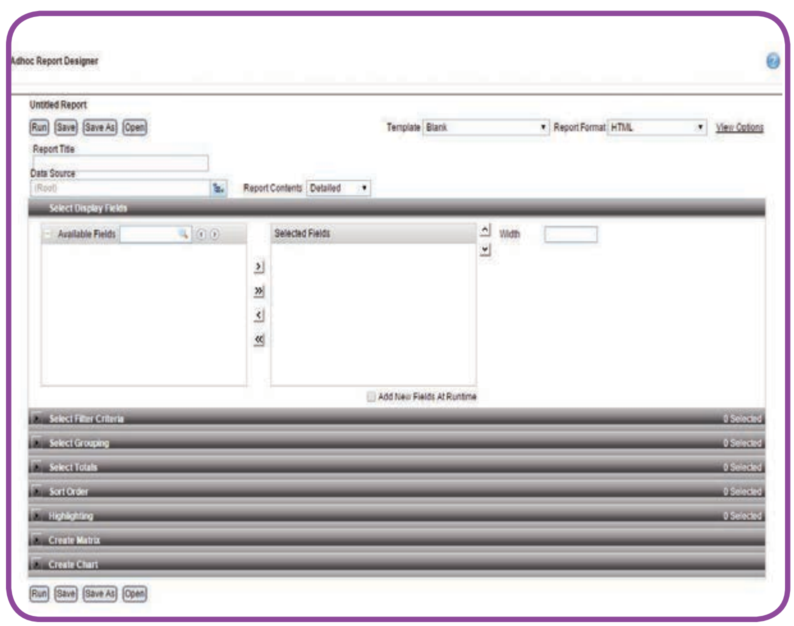
To get started, here's a breakdown of each of the eight sections available to create a report. Each section is reviewed in detail in the following pages.

- **Select Display Fields** (Data Source) – select query fields to be used for the report
- **Select Filter Criteria** – set up fields to have only selected records on your report
- **Select Grouping** – arrange report information in a logical group order
- **Select Totals** – add totals for specific fields as a line to the report
- **Sort Order** – organizes your report by a means other than grouping
- **Highlighting** – provides a visual indicator when a set condition is met
- **Create Matrix** – presents a summary of data
- **Create Chart** – provides a graphical representation of summary data

☑ **TIP: As with all projects, use "Save" frequently to ensure all updates and changes to your report layout are saved to your system.**



Your **Company's Reports** are available to anyone in your company provided access at this level for viewing/editing. **Your Reports** are available to only the person creating the report.



Using the various components available within the drop-down sections, create a simple report or a more complex report with an embedded chart or matrix.

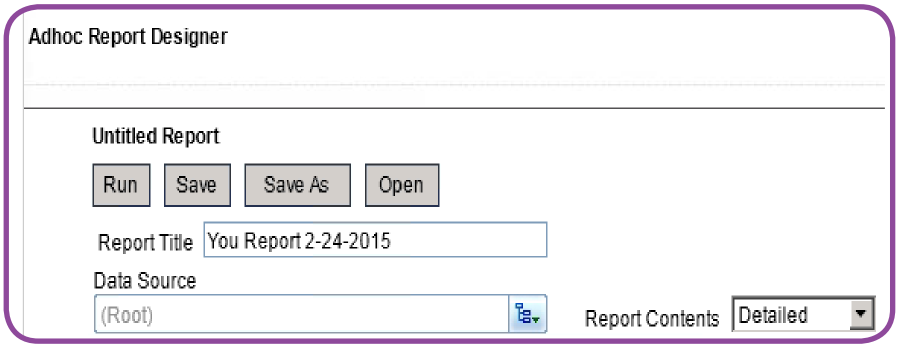
Report Information

Before beginning with the drop-down sections, complete some basic information about your report.

TIP: Since the Select Display Fields drop-down section is required in order to run your report, complete this section first.

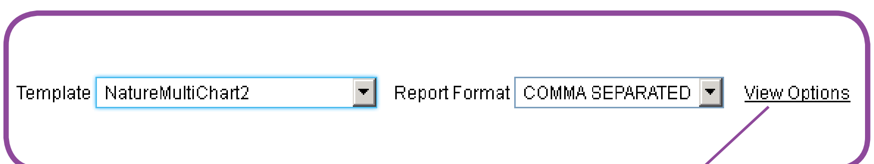
Report Run/Save/Save As/ Open Options

- Click **Run** after choosing options in the drop-down sections to be included in your report.
- Click **Save** or **Save As** to save your report in the appropriate location: **Your Company's Reports** (public) or **Your Reports** (private). From the Category List drop-down list, select **Company Folder** (**Your Company Reports**) or **Personal Folder** (**Your Reports**).



Template

Select a template to be used for the report. Some formats included are Ocean, Nature and WideReport. The templates generally apply to coloring, fonts and page size of the report.

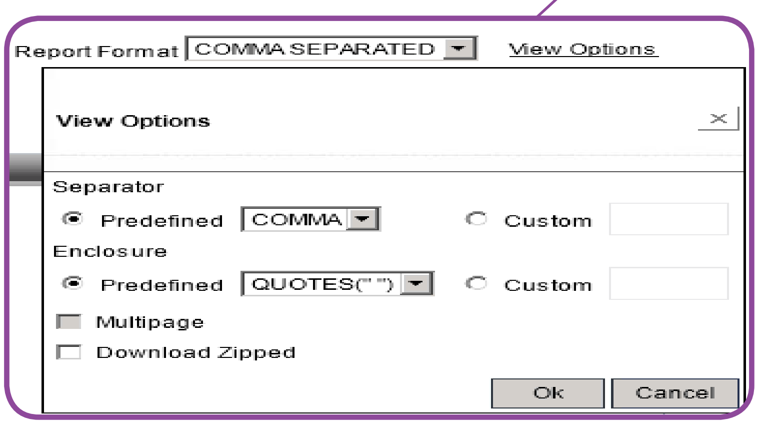


Report Format

Select the format to be used for the report. Options included are:

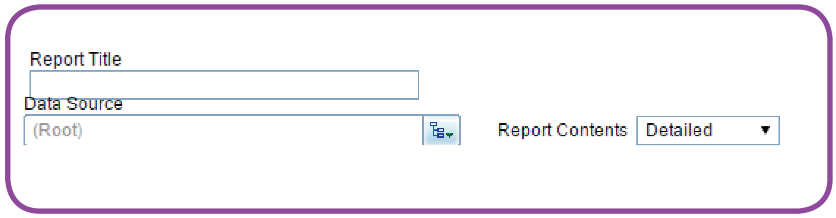
- HTML
- Acrobat PDF
- MS Excel
- Comma Separated
- Text
- MS Word

Click **View Options** to see options such as multipage delivery for various formats; a designated separator for delimited files and more. Available options vary based on the **Report Format** selected.

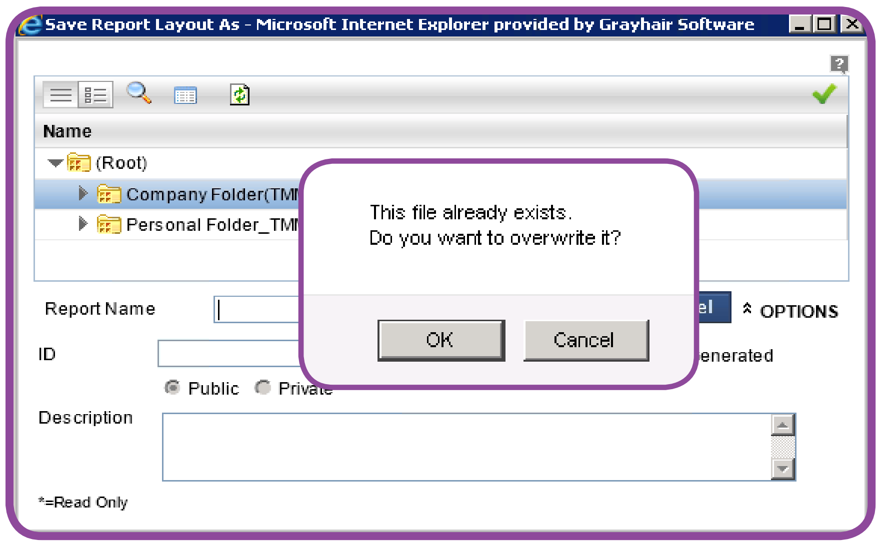


Report Title

Enter the title of your new report in the **Report Title** box. Duplicate titles will overwrite existing report layouts saved in the same area. Report names must be unique within the **Your Company's Reports** and **Your Reports** categories.



If you use a duplicate name for a report, a confirmation box appears prompting you to confirm before saving



Data Source

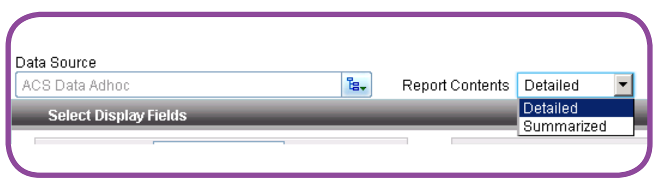
Use the **Data Source** drop-down list to choose your data source. There are three Data Source options:

- ACS Data Ad Hoc
- Job Package Summary Ad Hoc
- View All Single Pieces Ad Hoc

Available Fields options vary based on the data source selected.

Report Contents

From the **Report Contents** drop-down box, indicates if detailed or summarized reporting is to be used:

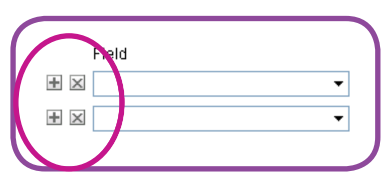


- **Detailed** - one line for each record; shows the lowest level detail of the report.

- **Summarized** - a summary report generally containing a report, page and group level summary only; hides the detail section and shows the lowest group level summary

  Summarized reports provide useful data only when groups and summaries are applied.

TIP: Throughout the Create/Edit Reports template, click the "+" box to add additional rows and the "x" to remove rows.



Select Display Fields

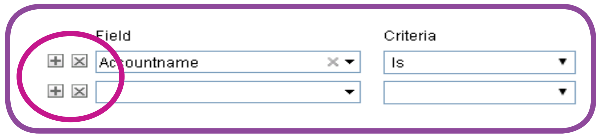
In the Select Display Fields drop-down section, select query fields to be used for the report.

Available Fields/Selected Fields

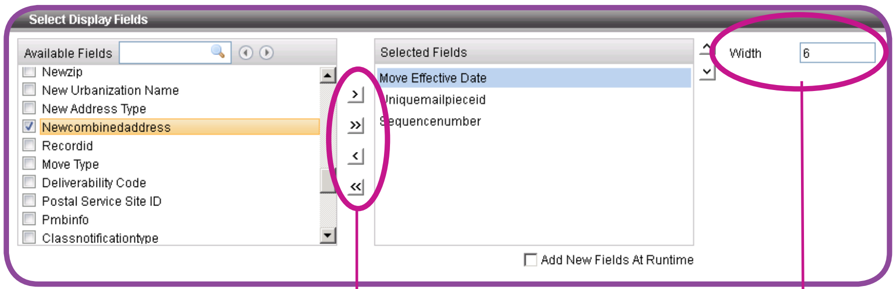
The selections listed in **Available Fields** change based on the **Data Source** chosen.

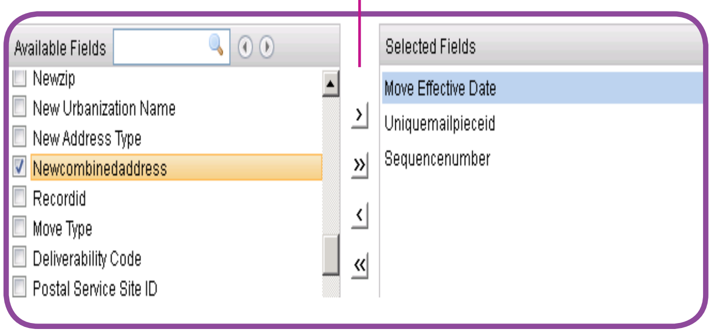
- Move the items to be used in your report from the **Available Fields** list to the **Selected Fields** list by checking the boxes next to the fields to be used and using the ">" arrow to move all the selected fields at once.
- Dragging and dropping individual fields to the **Selected Fields** table is also an option.
- The double arrows, ">>", can be used to move all **Available Fields** to **Selected Fields** or use these arrows, "<<", to remove all **Selected Fields** and place them back into **Available Fields** status.
- Use the search box next to **Available Fields** to search for a specific field to be used and use the arrows to move through the fields containing the search value.
- As you select each field, indicate the width of that field in the **Width** box provided or use the default value provided. Click on the selected field to view the default width value. Control the sequence of the fields in your report by highlighting a field then using the up and down arrow to the right of the **Selected Fields** box to move the selected field higher or lower on the list..

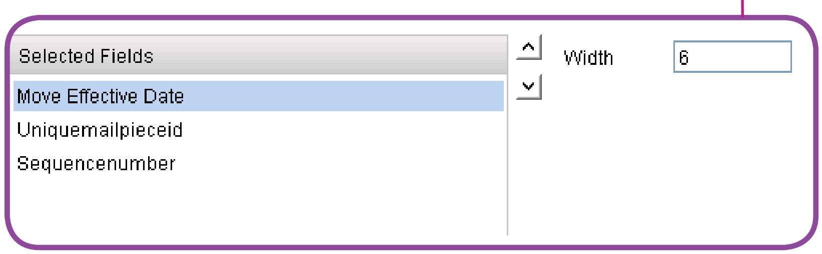
TIP: Click the "x" inside any drop-down box labeled Field to delete the contents of that box and contents of all other populated fields in that row. In the example below, click the "x" to delete "Accountname" and "Is".



The Select Display Fields section is the only section required to create a report.







Field sequence in this window shows the fields' placement sequence on the report.

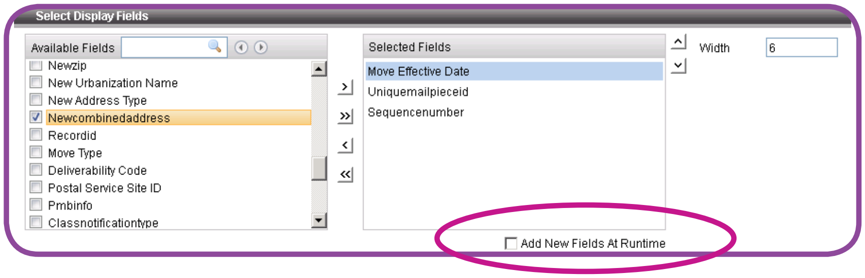
Add New Fields At Runtime

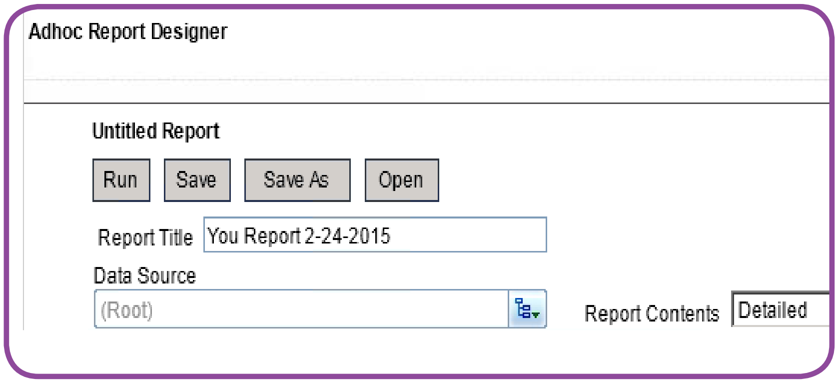
Available fields are based on the data source chosen. There may be times when new fields are added to the data source.

- Check this box to have any new fields, which have been added to your data source, show in the **Selected Fields** list in that saved report. These fields will be added the next time the report is run.

After saving a report, click **Run** to begin the report process. Use the drop-down list to select your job and click **Run Now** to continue processing.

To use an existing report, click **Open** and select the report you want to modify or run.





Detailed reporting options

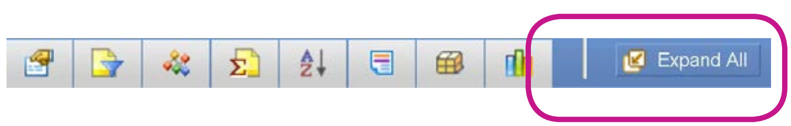
Further define your report, once it has run, by using the drop-down sections or by using the icons at the top of the report screen. The icons correspond to the drop-down sections and appear after your report has been run. Drop-down sections may be completed in any order.

Click on an icon to view or assign values in that section of the report; click the icon again to collapse that same section.

Icon	Section Name and Description
	Select Display Fields (Data Source) - select query fields to be used for the report
	Select Filter Criteria - sets up fields to have only selected records on your report
	Select Grouping - arrange report information in a logical group order
	Select Totals - add totals for specific fields as a line to the report
	Sort Order - organizes your report by a means other than grouping
	Highlighting - provides a visual indicator when a set condition is met
	Create Matrix - presents a summary of data
	Create Chart - provides a pictorial representation of summary data

Click the **Expand All/Collapse All** button to alternate between views:

- **Expand All** – when the button shows **Expand All**, only your report results show and you must click on an icon tor the section name o view an individual drop-down section.
- **Collapse All** – when the button shows **Collapse All**, all drop-down sections are viewable and open for information input



Select Filter Criteria

In the **Select Filter Criteria** drop-down section, select fields and criteria to show only selected information on your report.

Max. Rows/Suppress Duplicates

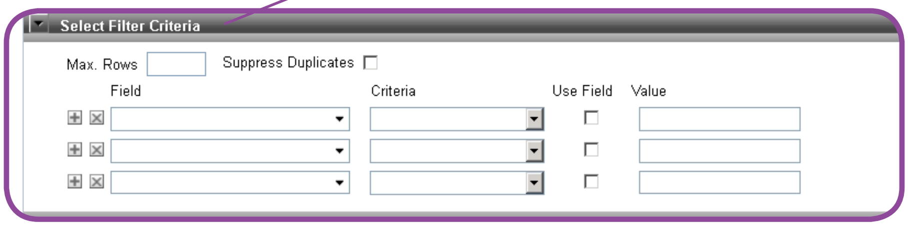
- Choose the maximum number of rows to display in your report using **Max. Rows**, and
- Check **Suppress Duplicates** to suppress rows containing duplicate information.

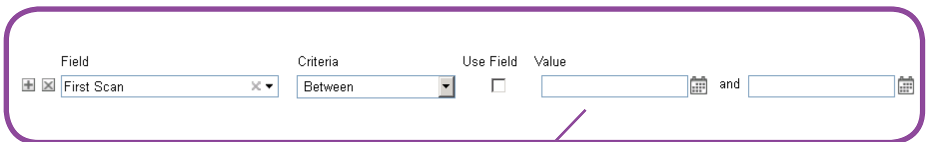
Field/Criteria/Use Field/Value

- **Field** - use the drop-down list to choose the fields to be included in your report. Options in this field are the same as those in **Available Fields** in the **Select Display Fields** drop-down section.
- **Criteria** - for each field, select the criteria condition to be met using the **Criteria** drop-down list. Options vary based on the **Field** selected.
- **Value** - the options in this field vary based on the selection made for **Criteria**. For some **Criteria** choices such as dates, you must specify starting and ending values. For **Criteria** choices such as "contains", enter a specific value to be used.
- **Use Field** - when **Use Field** is checked, choose the **Value** from the drop-down list. This option is not available for all **Fields**.
- **Value** - specify the value to be met for each field. The value entered example: Del. Days (field) between (criteria) 1 and 10 (value).

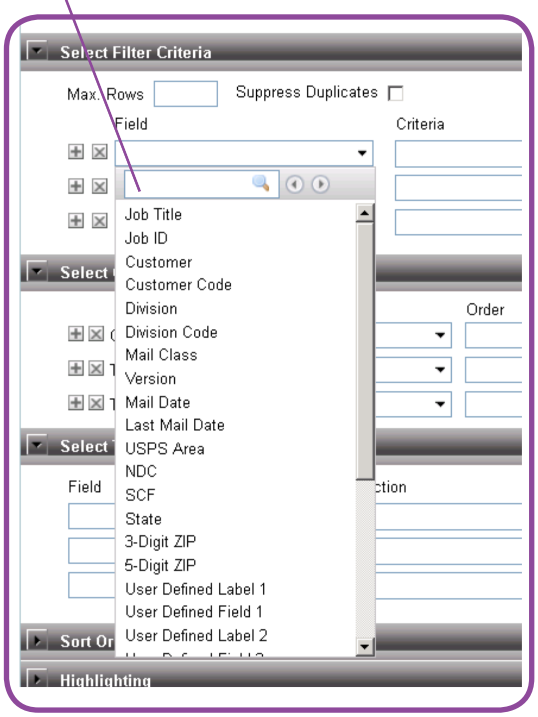
Click **Run** to update your report results or **Save/Save As** to save your updated report layout.

TIP: If you are setting up a report for the first time, consider limiting the number of rows and do test runs until you are satisfied with your report layout.





An example of a field requiring start and end dates is First Scan. Drop-down list of available fields in **Select Filter Criteria** are the same as the choices in the **Available Fields** option. Fields vary based on **Data Source** selected.

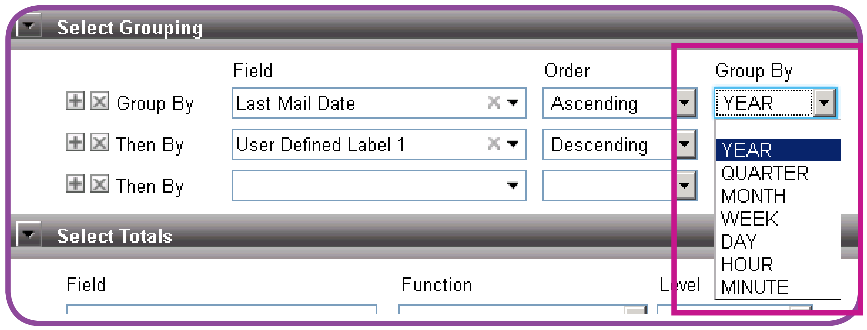


Select Grouping

I
In the **Select Grouping** drop-down section, determine the logical group order of the data in your report.

- **Field** - select the field to use to create the group
- **Order** -select the order of arrangement of that group
- **Group By** - select the method of arrangement of records within the group; for example, if **Last Mail Date** is used, you must also state the **Group By** value:

    Year
    Quarter
    Month
    Week
    Day
    Hour
    Minute

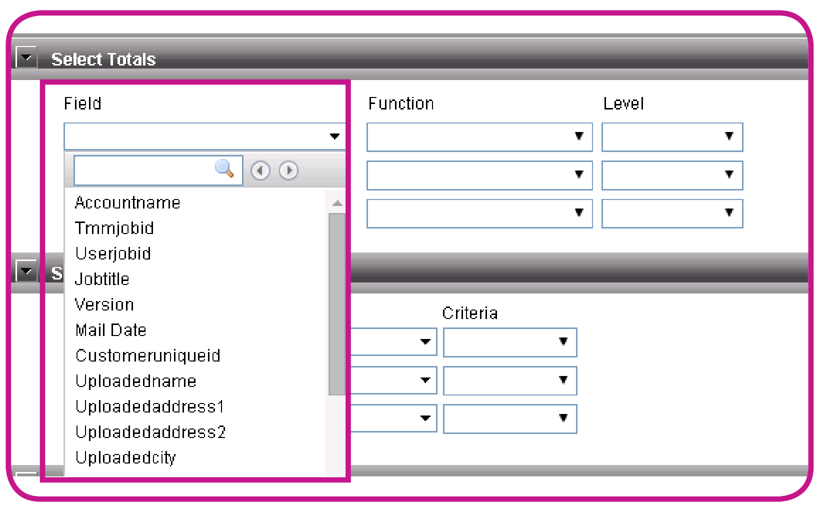


Select Totals

In the **Select Totals** drop-down section, add a summary line for those fields selected to your report.

Field/Function/Level

- **Field** - using the drop-down lists, choose the field to be processed to calculate summary information. If the field chosen is not in the **Selected Fields** list (**Select Display Fields** drop-down section), it is added automatically to the end of that list when chosen in **Select Totals**.
- **Function** - select the value of the summary function; for example, Count, Min, Max.
- **Level** - select the level at which you want the summary: Report, Page or Group.



Sort Order

In the Sort Order drop-down section, organize your report by a means other than grouping.

Field/Criteria

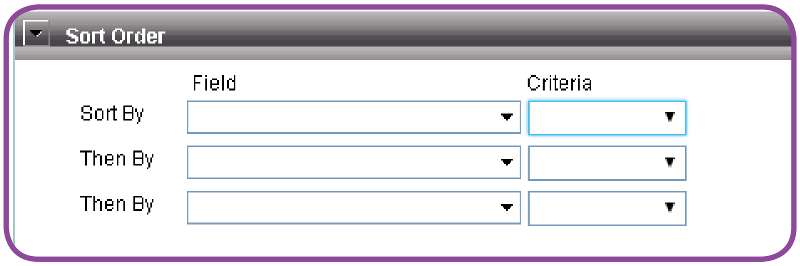
- **Sort By Field** - set the sort order if you want your report to be sorted but not grouped. You can have up to three levels of sorting. Use the drop-down list to choose the field on which you want the report sorted.
- **Criteria** - identify Ascending or Descending order.

Highlighting

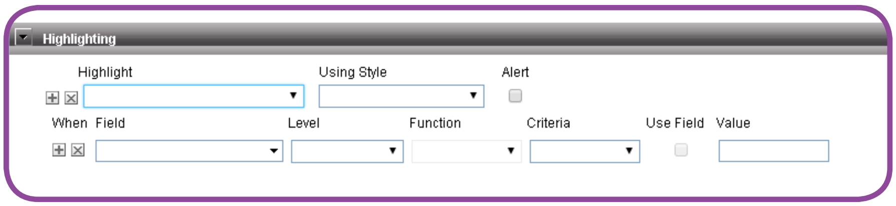
In the **Highlighting** drop-down section, identify results to be brought to your attention in your report using visual highlights or alerts.

- **Highlight -** provides a visual indication by row that a set condition is satisfied. Your report can have multiple alerts/ highlighting.
- **Using Style/Alert** -select the style of highlight to be applied from the **Using Style** drop-down. Options include a choice of colors, italic or bold.
- **Alert** - to receive a visual alert on report viewer, check the **Alert** box.
- **When Field -** use this drop-down list to select the field to be evaluated for highlighting/ alerting.
- **Level** - select from the drop-down list the level at which the selected field should be evaluated; **Level** options vary based on the **When Field** value chosen:
    - Detail – evaluate each row (record).
    - Report – evaluate at the end of the report.
    - Page – evaluate at the end of the page.
    - Group - evaluate at the end of each group identified in **Select Grouping.**

If you are using **Grouping**, **Sort Order** cannot be used. Only one of these two options can be used in a report.



Reminder: Choices available from the Field drop-down box are based on the Data Source selected.



*Sample of **Highlighting** when Delivery Days is greater than four.*

Job Name	Mail Class	City	ZIP	Del. Days
Early Bird Campaign	1st Class	STERLING HEIGHTS	48312	4
Early Bird Campaign	1st Class	SHELBY TOWNSHIP	48315	4
Early Bird Campaign	1st Class	WEST BLOOMFIELD	48324	4
Early Bird Campaign	1st Class	FARMINGTON HILLS	48331	4
Early Bird Campaign	1st Class	FARMINGTON HILLS	48335	4
Early Bird Campaign	1st Class	OXFORD	48371	4
Early Bird Campaign	1st Class	NOVI	48374	4
Early Bird Campaign	1st Class	NOVI	48377	4
Early Bird Campaign	1st Class	OKEMOS	48864	4
Early Bird Campaign	1st Class	SOUTH BARRINGTON	60010	4
Early Bird Campaign	1st Class	BARRINGTON	60010	4
Early Bird Campaign	1st Class	FRANKFORT	60423	4
Early Bird Campaign	1st Class	BALLWIN	63011	4
Early Bird Campaign	1st Class	CHESTERFIELD	63017	4
Early Bird Campaign	1st Class	FLORISSANT	63033	4
Early Bird Campaign	1st Class	BRIDGETON	63044	4
Early Bird Campaign	1st Class	EARTH CITY	63045	4
Early Bird Campaign	1st Class	SAINT LOUIS	63101	8
Early Bird Campaign	1st Class	SAINT LOUIS	63118	4

- **Function -** specify the **Function** to be applied if Report or Page is selected in **Level; Function** options change based on the **When Field** you choose and, for some choices, may not be available.

- **Criteria/Value** - select the criteria from the drop-down list and specify a value to be met.

- **Use Field** - when **Use Field** is checked, **Value** options pulled from the **Available Fields** options are displayed as a drop-down list.

Create Matrix

In the **Create Matrix** drop-down section, assign **Available Fields** to columns, rows and summary fields to produce a report in matrix form.

A matrix represents a summary of data. Use **Link Chart** to connect the matrix being created to a chart.

- Use the arrows provided or drag and drop items from the **Available Fields** box to the **Column Fields**, **Row Fields** and **Summary Fields** boxes.

- Specify the **Group By** function from the respective drop-down lists.

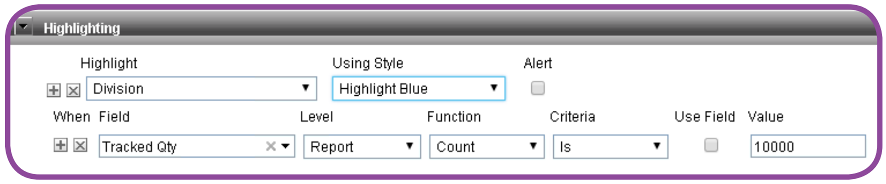
- Use the **Totals** checkbox to get total row/column.

- Use the up and down arrows next to each field box to arrange the order of the **Fields** within each field box.

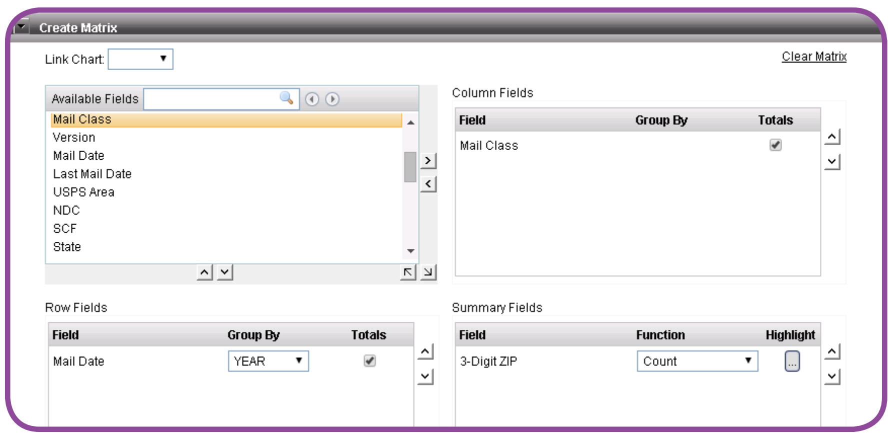
- Click **Run** to view the report.

- Click **Save** or **Save As** to save your report layout or any changes made to the layout.

- Click **Clear Matrix** at any time to remove all entries in the matrix fields.



Make sure the right query object is selected from the Select Display Fields before beginning **Create Matrix**.



You must have one field entered in each of the **Column Fields**, **Row Fields** and **Summary Fields** areas in order to run the report using **Create Matrix**.

Create Chart

Create Chart provides a graphic view of your data. Include any available field and select from multiple display formats to present the data for quick, visual interpretation.

- Using the **Title** box, add a title to your chart. .
- Use the **Chart Type** to indicate the type of chart you want displayed.
- Use the **Link** option to connect your chart with report fields or with the matrix.
- Use **Available Fields** for the **Value Fields** (Y-axis), drag and drop to move fields from **Available Fields** to **Value Fields**.

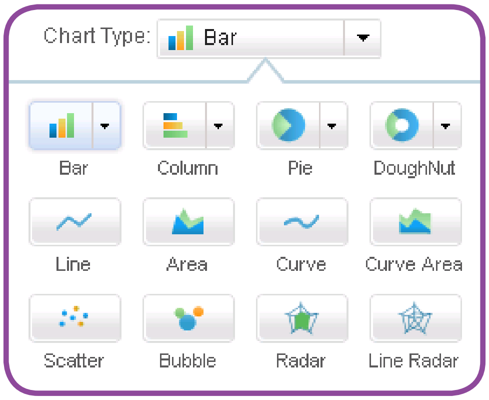
  Specify the **Function** for the selected field. If you want a chart type different from the selected **Chart Type**, use the **Series Type** drop-down list to indicate new chart type.

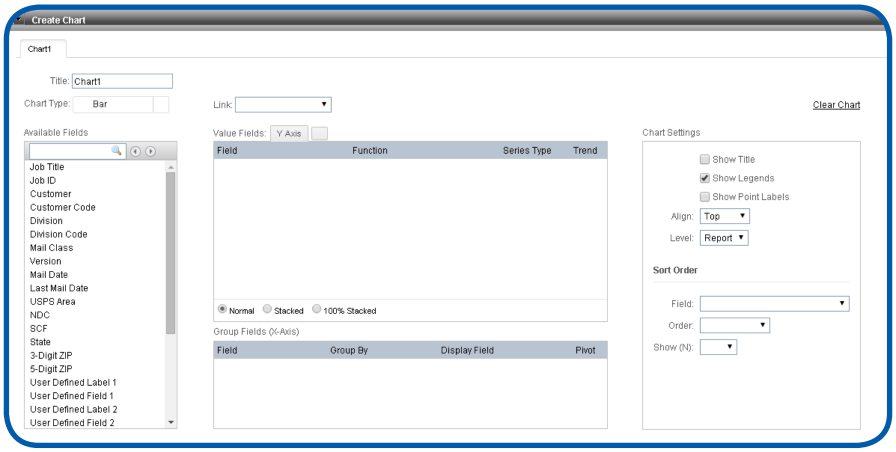
  Use **Trend** to show the general increase/decrease for a value over time.
- For the **Group Fields** (X-axis), drag and drop to move fields from **Available Fields** to **Group Fields**.

  Use **Group By** to select a method on which to group (numeric or data basis). An example of numeric grouping is groups of 10, where “10” would be entered in the **Group By** box.

  To **Group By** a data basis, use the drop-down list and select day, week, month, quarter or year. Not all fields present a **Group By** option.

  Display Field allows a different field title than the data field being used to be displayed on the report.





Pivot, if checked, summary information for all x-axis field at the top of the report.

Chart Settings

- Use the three available check boxes to add detail to your chart:

  Show Title - display your assigned chart title on the final report.
  Show Legends - display the table of identifying various labels, icons and measurements on the final report.
  Show Point Labels - are points on the chart that show the actual value indicated by the chart. For example, on a bar graph, each bar has a number above it representing the actual value reflected by that bar.

- **Align** - chart alignment is an important component of your report.

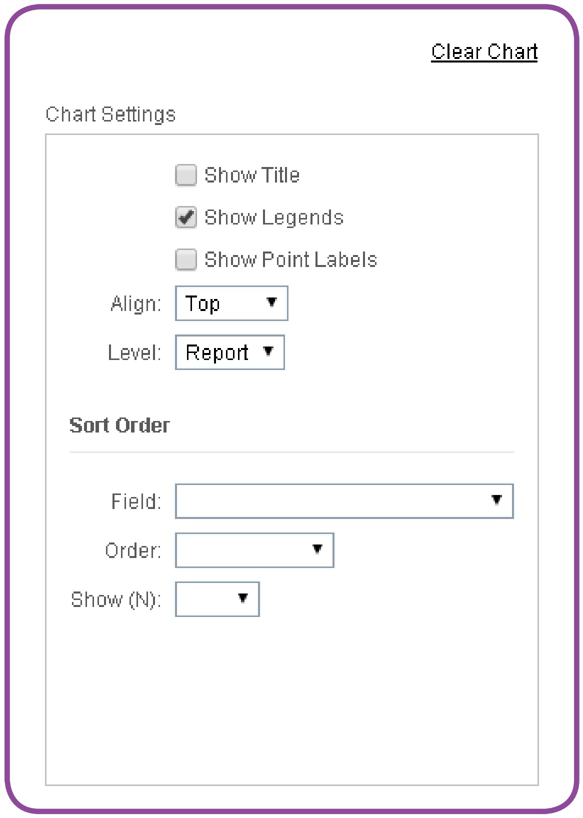
  Use **Align** to specify placement of the chart:

  Top – places chart in the Header
  Bottom – places the chart in the Footer.

- From the **Level** drop-down list, select the level for the chart placement:

  Choose **Page** to have the chart on the page header/footer

  Choose **Report** to have the chart on the report header/ footer.



Use the **Clear Chart** button to remove all chart settings.

Sort Order

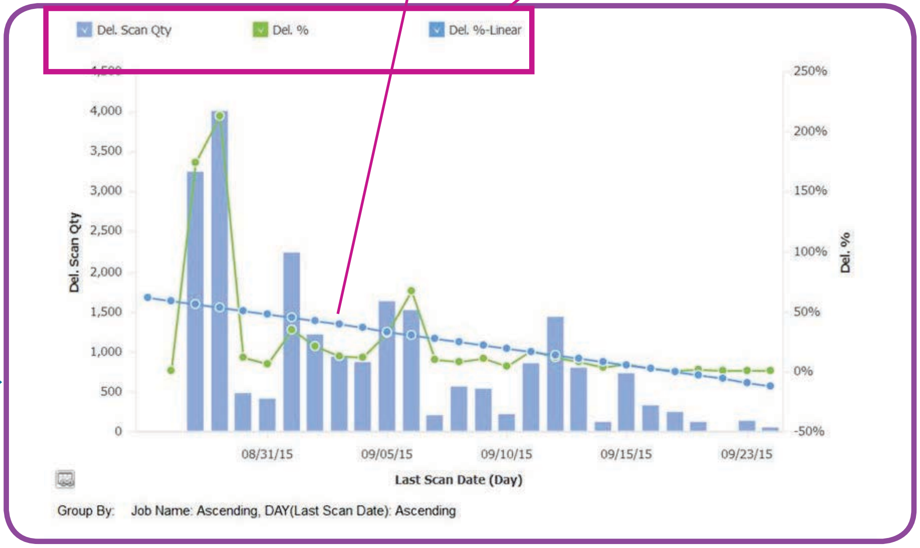
- **Field -**
- **Order - i**dentify ascending or descending order**.**
- **Show (N)** - allows you to choose only a few top values for the chart; for example, if doing a chart using the Sales Summary Field, specify 15 to include records having the top 15 sales summaries.

This report illustrates **Trend** and **Pivot**.

Example of Trend

Example of Pivot

Sample Report



Highlighting: Delivery days where the total is not 4 are highlighted in green.

Job Name	Mail Class	City	ZIP	Del. Days
Early Bird Campaign	1st Class	STERLING HEIGHTS	48312	4
Early Bird Campaign	1st Class	SHELBY TOWNSHIP	48315	4
Early Bird Campaign	1st Class	WEST BLOOMFIELD	48324	4
Early Bird Campaign	1st Class	FARMINGTON HILLS	48331	4
Early Bird Campaign	1st Class	FARMINGTON HILLS	48335	4
Early Bird Campaign	1st Class	OXFORD	48371	4
Early Bird Campaign	1st Class	NOVI	48374	4
Early Bird Campaign	1st Class	NOVI	48377	4
Early Bird Campaign	1st Class	OKEMOS	48864	4
Early Bird Campaign	1st Class	SOUTH BARRINGTON	60010	4
Early Bird Campaign	1st Class	BARRINGTON	60010	4
Early Bird Campaign	1st Class	FRANKFORT	60423	4
Early Bird Campaign	1st Class	BALLWIN	63011	4
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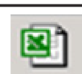
Early Bird Campaign	1st Class	FLORISSANT	63033	4
Early Bird Campaign	1st Class	BRIDGETON	63044	4
Early Bird Campaign	1st Class	EARTH CITY	63045	4
Early Bird Campaign	1st Class	SAINT LOUIS	63101	8
Early Bird Campaign	1st Class	SAINT LOUIS	63118	4
Early Bird Campaign	1st Class	SAINT LOUIS	63126	4
Early Bird Campaign	1st Class	SAINT LOUIS	63158	4
Early Bird Campaign	1st Class	KANSAS CITY	64129	4
Early Bird Campaign	1st Class	LENEXA	66214	4
Early Bird Campaign	1st Class	SHAWNEE	66216	4
Early Bird Campaign	1st Class	HOT SPRINGS NATIONAL PARK	71903	4
Early Bird Campaign	1st Class	HOT SPRINGS NATIONAL PARK	71913	4
			26	

Create Matrix: Shows how many 1st Class pieces were in each ZIP Code.

	Mail Class	
ZIP	1st Class	Total
48312	4	4
48315	4	4
48324	4	4
48331	4	4
48335	4	4
48371	4	4
48374	4	4
48377	4	4
48864	4	4
60010	8	8
60423	4	4
63011	4	4
63017	4	4
63033	4	4
63044	4	4
63045	4	4
63101	8	8
63118	4	4
63126	4	4
63158	4	4
64129	4	4
66214	4	4
66216	4	4
71903	4	4
71913	4	4
Total	108	108

Report Options

In **Create/Edit Reports**, use the icons in the report toolbar to export or distribute your report.

Icon	Export your report as
	A Microsoft Excel file
	An Adobe Acrobat PDF document
	A comma/tab delimited file
	A text file
	A Microsoft Word document

.

Use the yellow envelope icon to send an automated email to your list of recipients

Use the yellow envelope icon to email your reports to a recipient list of your choosing.

While email content is provided, you can delete this and compose your own message prior to sending.

This is the content of the email sent from the yellow-envelope icon:

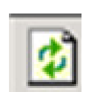
Hello,

You have received this automated email to let you know that report SampleReport2 has been generated. Please find the report attached.

This is a system generated email so please do not reply to this address.

Regards,
System Administrator

Use this icon to refresh the view of your report:



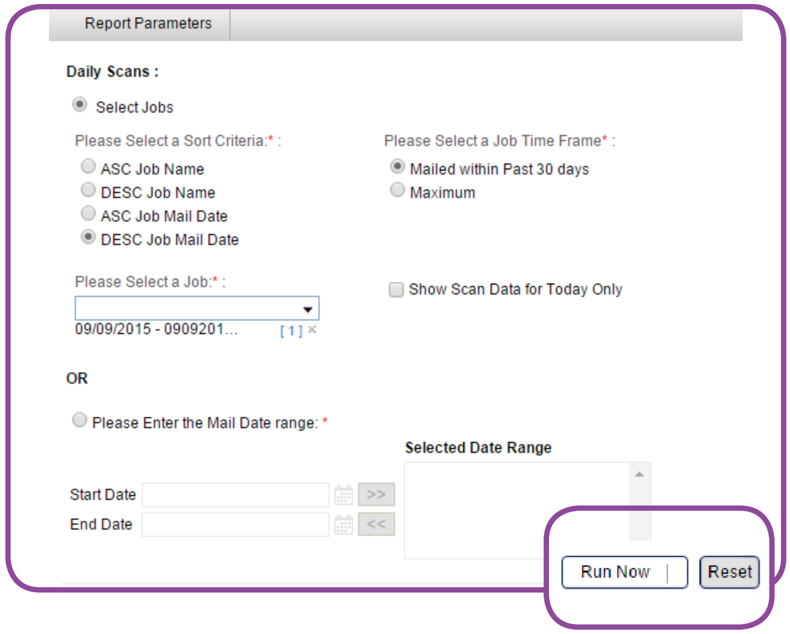
Click **Run** to update your report results or **Save/Save As** to save your updated report layout. To print a report, export the report in the desired format and print from that application.

Run or Schedule a Selected Report

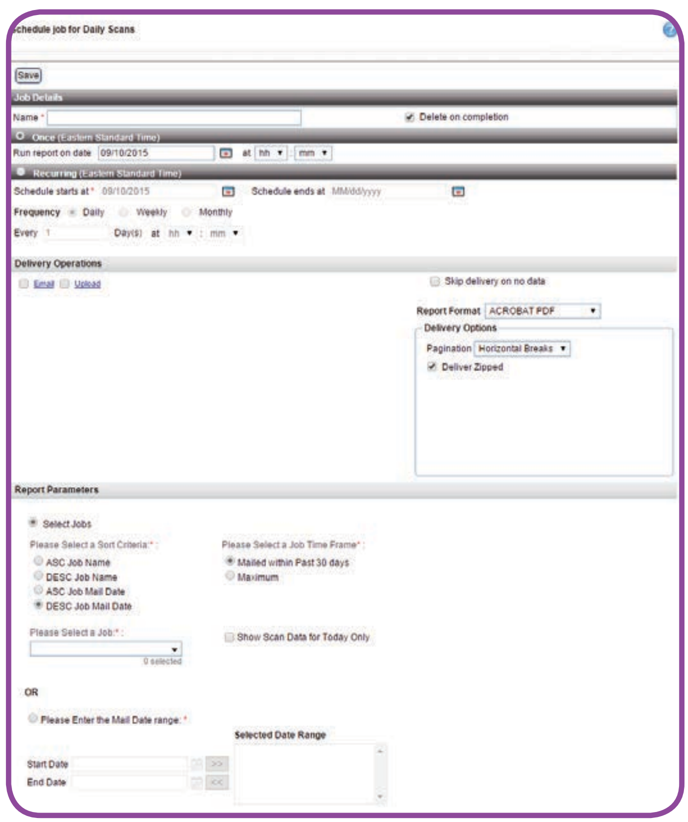
After choosing the report to run from **Standard Reports, Your Company's Reports** or **Your Reports**, choose **Run Selected Report** to run the selected report immediately, or choose **Schedule Selected Report** to schedule the selected report to run once on a scheduled date or on a recurring basis.

Report times are based on Eastern Time (ET).

***Run Selected Report** screen:*



***Schedule Selected Report** screen:*



Job Details

- Under **Job Details**, enter the **Name** by which the report is to be saved. **This is a required field.**

- If a report is scheduled to run once, you have the option to delete this report name from the job list upon completion of the scheduled run. To do this, check the **Delete on completion** checkbox.

Once

- Choose the date (mm/dd/yyyy), hour (hh) and minutes (mm) at which you want the report to run.

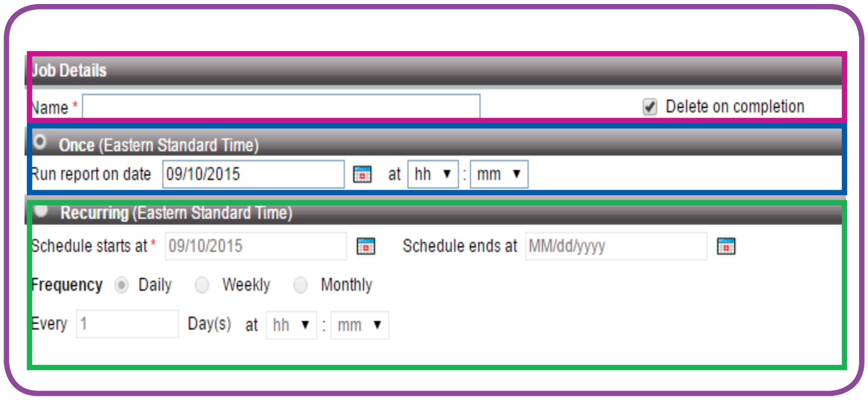
Recurring

- Choose the start and end dates for scheduled report recurrence.

- Schedule a report to run on a regular basis by identifying the frequency of the run - daily, weekly, monthly.

- Specify the number days (every xx days) and the hour (hh) and minutes (mm) of the start time.

*Use **Job Details** to name the report and indicate if the report should be deleted when completed.*



*In the **Once** section, indicate the date, hour and minute when the report is to run on a one-time basis.*

*In the **Recurring** section, select the start and end dates, frequency (daily, weekly or monthly) along with the day(s), hour and minute when the report is to run on a recurring basis.*

Under Job Details, Name is a required field.

Delivery Operations

Select the delivery method by checking either:

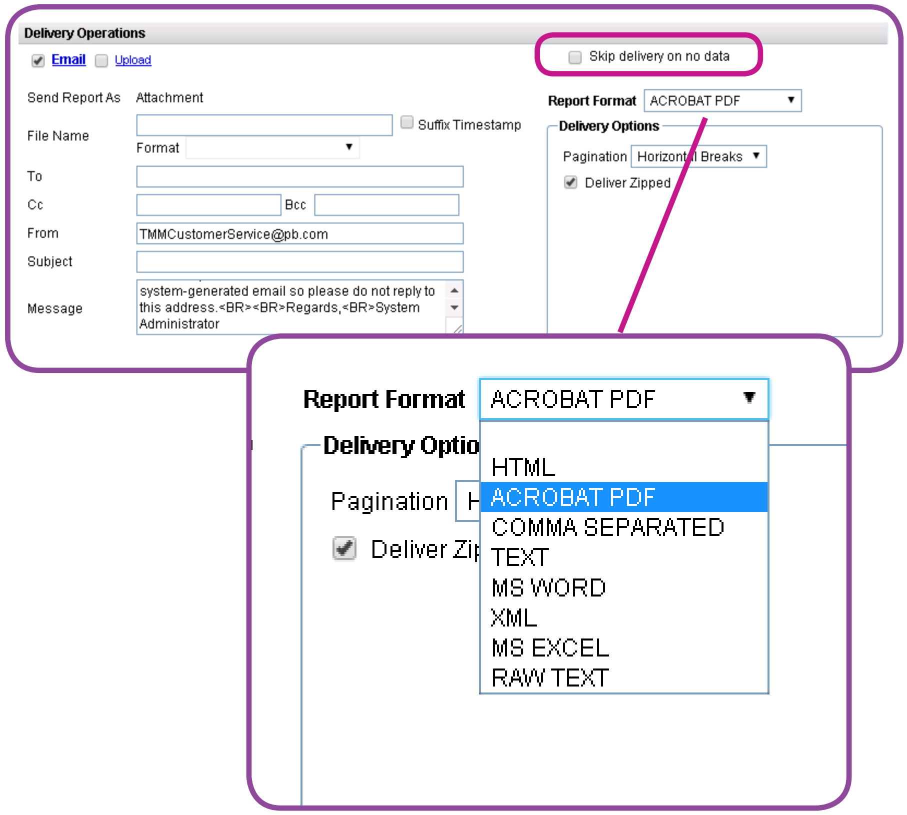
- **Email** to have the report emailed to you; or
- **Upload** to upload the report to a secure FTP server.
- Check the **Skip delivery on no data** checkbox to skip delivery of the report if no data is available for that run.

Delivery Operations - Email

When **Email** is selected, these fields are presented.

Use the drop-down menu to indicate the **Report Format**. **Delivery Options** changed based on the **Report Format** chosen. Supply the information needed based on the format chosen.

- **HTML -** no additional information needed.
- **Acrobat PDF** - Indicate pagination preference: single page, multiple page or horizontal breaks. Using the checkbox, indicate if a zipped delivery is needed.
- **Comma Separated** - Indicate the type of Separator being used; default is “Predefined” and “COMMA”. “Tab” is available as an option from the “Predefined” down-down list. Check the “Custom” radio button to enter a separator other than tab or comma. Indicate the Enclosure being used; default is “Predefined” and “QUOTES (“”)”. Check the “Custom” radio button to enter an enclosure other than quotes. Pagination defaults to single page. Using the checkbox, indicate if a zipped delivery is needed.
- **Text** - Pagination defaults to single page. Using the checkbox, indicate if a zipped delivery is needed.



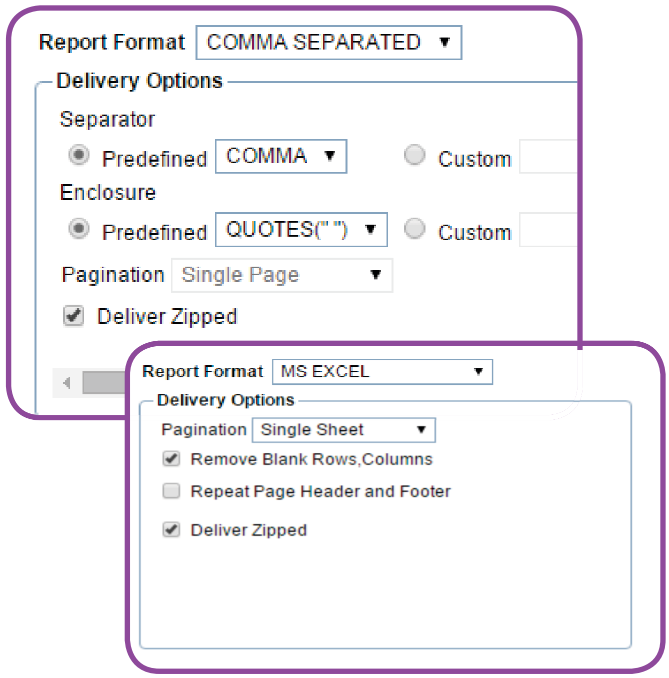
TrackMyMail does not support delivery to secure FTP sites.

- **MS Word** - Pagination defaults to multiple page. Using the checkbox, indicate if a zipped delivery is needed.

- **XML** - Pagination defaults to single page. Using the checkbox, indicate if a zipped delivery is needed.

- **MS Excel -** Indicate pagination preference: single sheet, multi-sheet or horizontal breaks. Additional checkboxes are available to indicate: Remove Blank Rows, Columns and Repeat Page Header and Footer. Using the checkbox, indicate if a zipped delivery is needed.

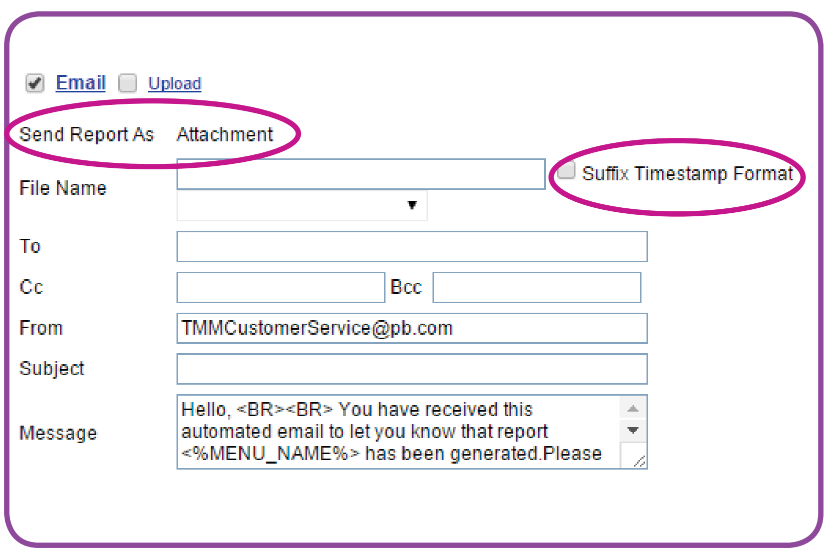
Delivery Options *for Comma Separated* ***Report Format*** *differs from the* ***Delivery Options*** *for MS Excel.*



The report will be sent as an attachment to a pre-assigned distribution list entered by you. An automated email is distributed to the list assigned and/or names in the cc and bcc fields on the email. At least one user must be entered in the **To** field.

Check the **Suffix Timestamp Format** box to have a timestamp included on your email. The timestamp provides data regarding when the report was scheduled to run. There are multiple formats available for the timestamp such as:

- MM-dd-yyyy
- MM dd yyyy HH mm ss
- MM dd yyyy hh mm a
- dddd MMM yy



Definitions of some formats included are:

- MM – month presented in numeric format: 04
- MMM – month presented in abbreviated format: Apr
- MMMM – month written out: April
- dd – day presented in numeric format showing only the date: 10
- ddd – day presented in abbreviated format showing the day of the week and date : Tues 10
- dddd – day presented showing day of the week written out and date: Tuesday 10
- YY – year presented in abbreviated format: 09
- YYYY – year presented in full format: 2009
- hh, mm, ss – indicates the hour, minute and second the report was run
- a – indicates either AM or PM

Enter a subject of your choosing in the **Subject** text box. While email content is provided, you can delete this and compose your own message prior to sending. This is the default content of the email:

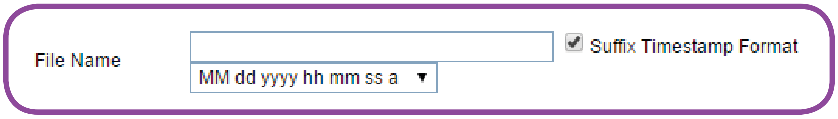
Delivery Operations - Upload

When **Upload** is selected, these fields are presented.

Use the drop-down menu to indicate the Report Format. Options include:

- Acrobat PDF
- Comma Separated
- Text
- MS Word
- XML
- MS Excel

*Sample of **Suffix Timestamp Format**:*



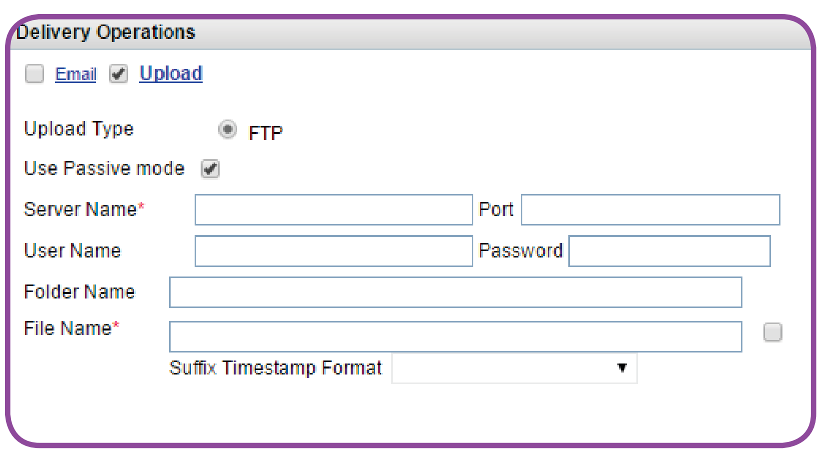
Content of auto-generated email sent with report. Content can be modified.

Hello,

You have received this automated email to let you know that report <%MENU_NAME%> has been generated. Please find the report attached.

This is a system-generated email so please do not reply to this address.

Regards,
System Administrator



As with **Delivery Operations Email**, the **Delivery Options** change based on the **Report Format** chosen. Provide the requested information based on your choice.

Provide the following information requested when **Upload** is selected.

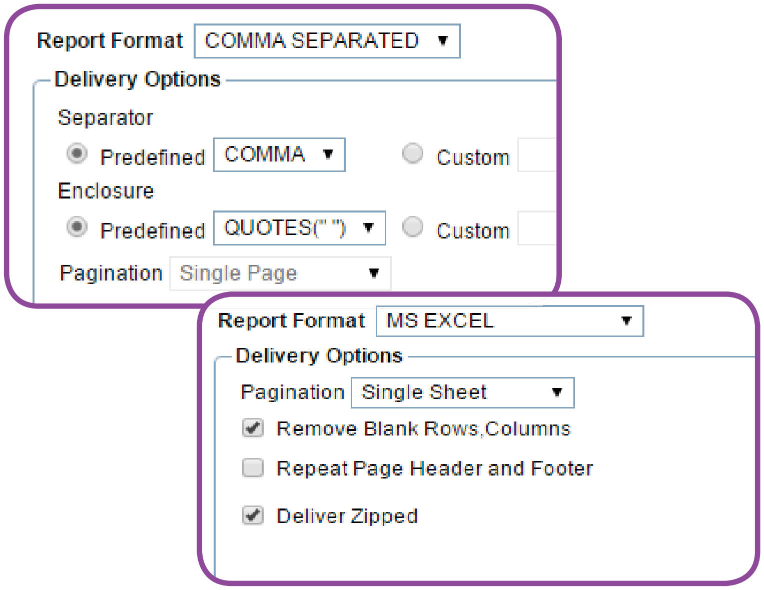
- **Upload Type** is set to FTP. This cannot be changed.
- **Use Passive mode** is checked by default. Uncheck to use active mode.
- **Server Name** indicates the name of your server to which TrackMyMail connects to FTP the files. **This is a required field**.
- **Port** indicates the connection to be used to FTP the reports.
- **User Name** and **Password** are the user name and password used to access your FTP account.
- **Folder Name** indicates the name of the folder in which the report is to be placed.
- **File Name** indicates the name under which you want the report to be saved. **This is a required field**.

The report uploaded to the location designated by you with the information provided above.

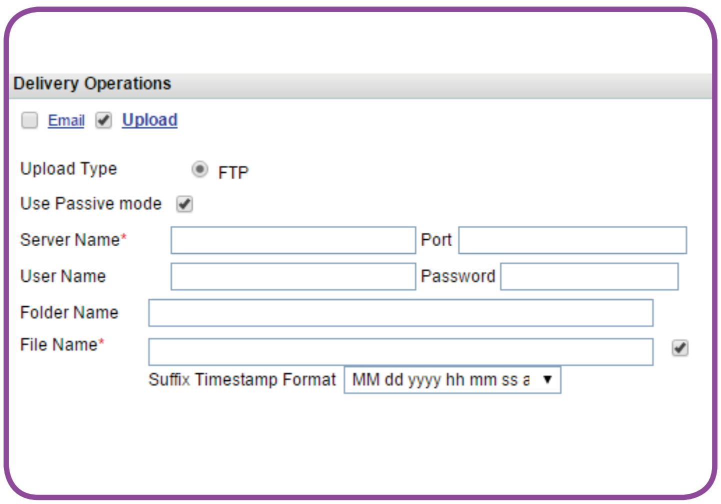
Check the "Suffix Timestamp Format" box to have a timestamp included on your email. The timestamp provides data regarding when the report was scheduled to run. There are multiple formats available for the timestamp such as:

- MM-dd-yyyy
- MM dd yyyy HH mm ss
- MM dd yyyy hh mm a
- dddd MMM yy

Delivery Options *vary based on* ***Report Format*** *chosen. Below, Comma Separated vs MS Excel :*



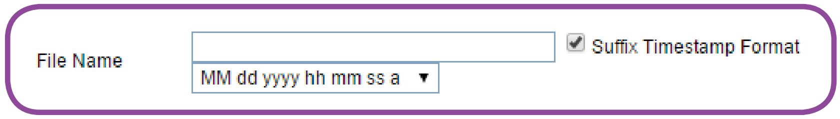
Server Name is a required field.



File Name is a required field.

Definitions of some formats included are:

- MM – month presented in numeric format: 04
- MMM – month presented in abbreviated format: Apr
- MMMM – month written out: April
- dd – day presented in numeric format showing only the date: 10
- ddd – day presented in abbreviated format showing the day of the week and date : Tues 10
- dddd – day presented showing day of the week written out and date: Tuesday 10
- YY – year presented in abbreviated format: 09
- YYYY – year presented in full format: 2009
- hh, mm, ss – indicates the hour, minute and second the report was run
- a – indicates either AM or PM
- Report Parameters

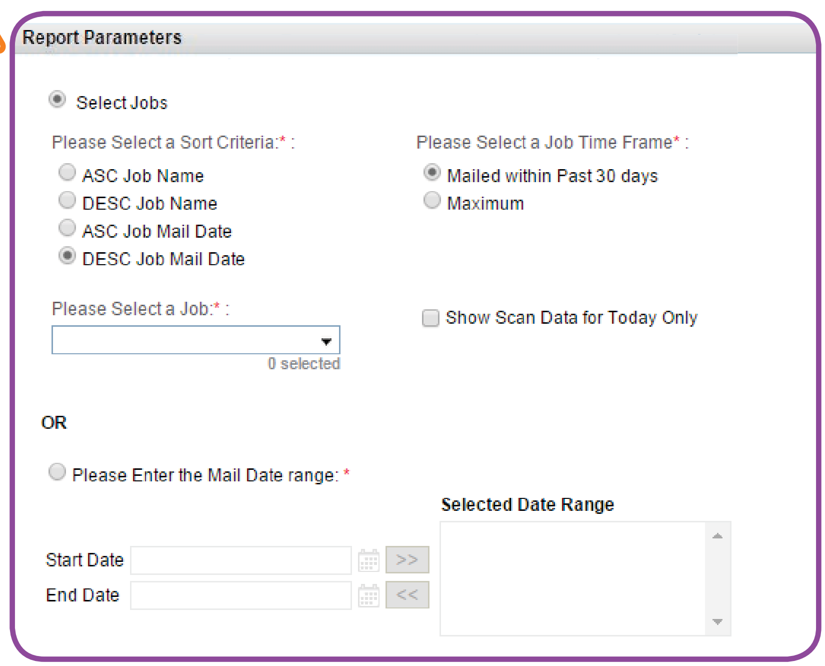


Report Parameters

Select Jobs is checked by default.

Select a Sort Criteria from the list provided. Options are:

- **ASC Job Name** - this is the default; sort in ascending order based on job name.
- **DESC Job Name** - sort in descending order based on job name.
- **ASC Job Mail Date** - sort in ascending order based on job mail date.
- **DESC Job Mail Date** - sort in descending order based on job mail date.



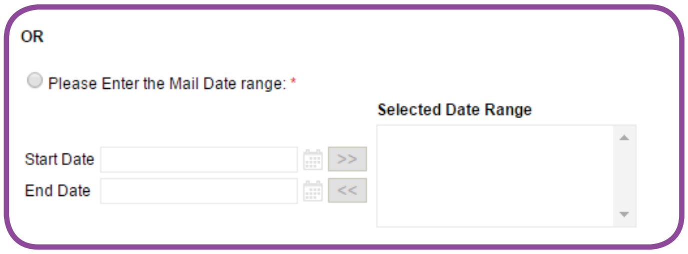
Select a Job Time Frame by clicking on the appropriate radio button. Options are:

- Mailed within Past 30 Days - this shows only those jobs that mailed in the past thirty days
- Maximum - this shows all jobs mailed and currently saved in the database for this client.
- **Select a Job -** from the drop-down list presented. The list of jobs available changes depending on the report chosen.
- **Show Scan Data for Today Only** - check this box if you want scan data from today to be the only scan data included in your report.

OR

- **Enter the Mail Date range** - if not selecting a job, select a **Start Date** and **End Date** to be used for the report. Both the start and end dates must be selected before moving to **Selected Date Range**.

Start Date and **End Date** must both be selected before moving to **Selected Date Range.**



Enter the Mail Date range is required if not using **Select Jobs**.

6 Lookup Tools

In this Chapter

Lookup Tools

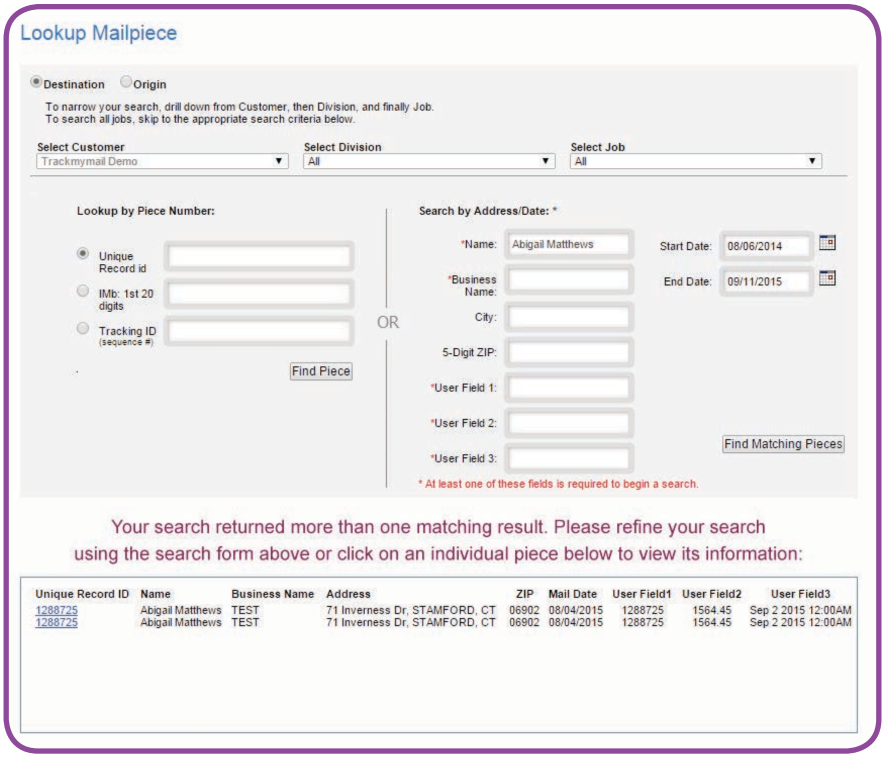
Look up by Piece Number

Search by Address/Date

Search Results

From this tab, search for mailpieces using either Lookup by Piece Number or the Search by Address/Date option. Narrow your search by choosing a Customer, Division and Job before entering your search criteria.

Use Mailing Details to view information about the mailpieces based on scan data received.



Lookup Tools

The following features are available through Lookup Tools, Single Piece. Information available through Single Piece is based on the information included when you job was processed in PrecisionTrack.

Lookup Mailpiece

TrackMyMail offers the option to look up individual mailpieces by two methods:

Lookup by Piece Number

Search by Address/Date

Before choosing your search method, use the radio buttons to indicate which type of tracking information you are entering:

Destination - outbound tracking

Origin - inbound tracking

Narrow your search time and results to a more defined selection by using the progressive drop-down options provided:

Select Customer - lists all customers allowed based on your login permissions; then choose:

Select Division - lists all divisions associated with the selected customer; then choose:.

Select Job - lists all jobs associated with the selected division.

Look up by Piece Number

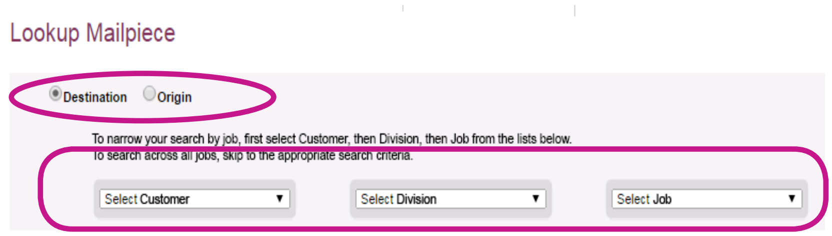
Enter one of the following search criteria to search by Piece Number:

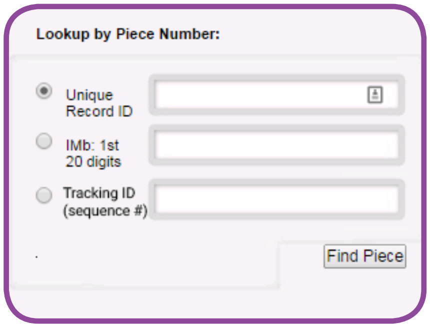
1. The **Unique Record ID**;
2. The **first 20 digits of the Intelligent Mail barcode** (IMb); or
3. The **Tracking ID** (sequence #), typically the last six or nine digits of the Intelligent Mail sequence number.
    - Must be all numeric; six or nine digits; and
    - Leading zeros are allowed; such a 000001.

Then click **Find Piece**.

Lookup by Piece Number and **Lookup by Address/Date** provide two methods to access the same output.

The "Select" fields are progressive. You must select a Customer first, then, if you wish, a Division and finally a Job.

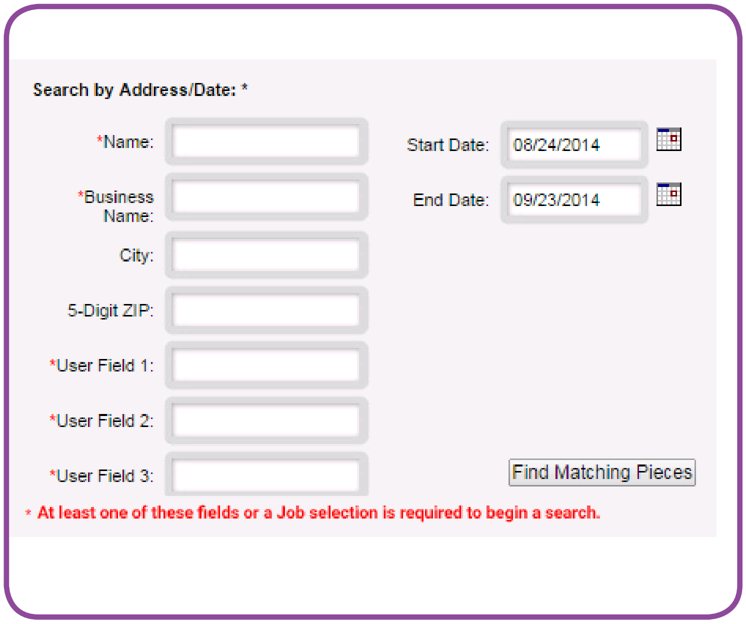




OR

Search by Address/Date

1. Simply enter a name or business name.
2. Enter a city or 5-digit ZIP to refine your search.
3. If populated when your job was submitted for processing, enter search criteria in User Fields 1, 2 or 3.
4. Select a start and end date that includes possible mail dates for that piece.
5. Click **Find Matching Pieces**.



When using Lookup by Name, you must use at least one of the required criteria fields listed in the image above.

TIP: The more complete your selection criteria, the more finite your search results will be.

User Fields 1, 2 and 3 are available as search fields only if the fields were defined and populated in PrecisionTrack jobs when processed.

This table provides a breakdown of the fields available for searching by Piece Number or by Address/Date.

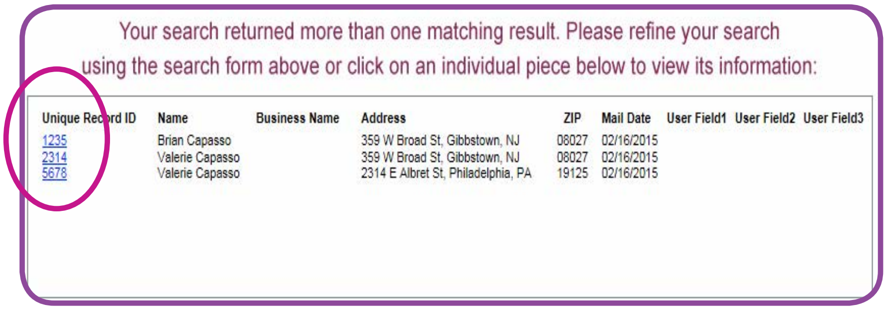
Method	Action	Note
Lookup by Piece Number:		
Unique Record ID	Enter a specific mailpiece Unique Record ID to retrieve information related to that mailpiece.	This is a customer-generated identifier. It is possible to receive multiple matches if searching using this field. Click on **Unique Record ID** in the results fields for details on each match.
IMb (1st 20 digits)	Enter the first 20 digits of the IMb assigned to the mailpiece.	
Tracking ID (sequence #)	Enter the specific Tracking ID assigned to the mailpiece	
Search by Address/Date:		
Name	Enter the full name or any part of the name of the addressee on the mailpiece	The search engine is flexible when searching on the name fields. Enter the full name or a complete first name with a full/partial last name or full/partial business name and the software returns possible matches. The mailpiece lookup may provide you with multiple matches when searching by address/date. Click on the **Unique Record ID** for details on each match.
Business Name	Enter the full business name associated with the mailpiece record or any part of the business name.	The same flexibility applies to business name searches as is covered above for **Full Name.**
City	Enter the city associated with the mailpiece record.	The more complete your selection criteria, the more finite your search results will be.
5-Digit ZIP	Enter the 5-digit ZIP associated with the mailpiece record.	The more complete your selection criteria, the more finite your search results will be.
User Field 1, 2 or 3	Enter search criteria based on fields you have defined when setting up your job.	These fields must be identified and populated in your input file before submitting your job for processing. These fields allow you to search based on data elements that are meaningful to you.
Start Date	Enter a Start Date based on **Induction Date** or **Mail Date** to expand your search match potential.	**Induction Date** is a more precise date for when the mail entered the postal system. It is delivered from the Mail XML messaging from the USPS and the Mail.dat information provided from you or your clients. **Mail Date** is based on the mail date that was entered when the job was set up in TrackMyMail.
End Date	Enter an end date based on **Induction Date** or **Mail Date** to expand your search match potential.	Same as **Start Date** above.

Search Results

The data fields listed below are returned for both retrieval methods:

- Unique Record ID
- Name
- Business Name
- Address
- ZIP
- Mail Date
- User Field 1
- User Field 2
- User Field 3

To access additional details about a mailpiece, click on the **Unique Record ID** to drill down to the next level.

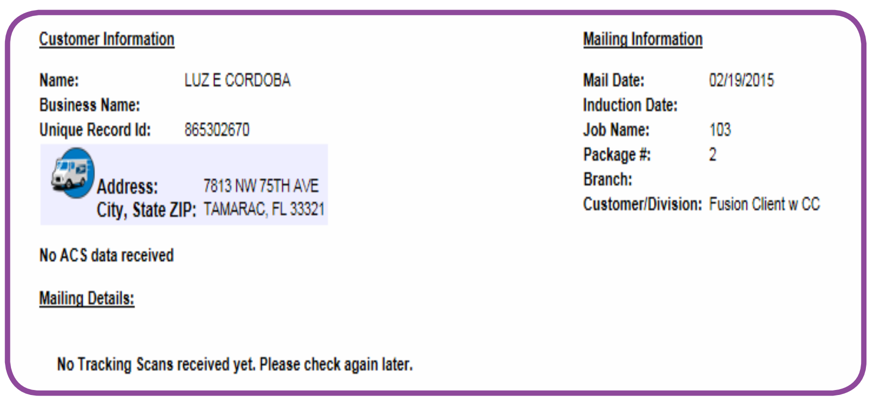


Your search returned more than one matching result. Please refine your search using the search form above or click on an individual piece below to view its information:

Unique Record ID	Name	Business Name	Address	ZIP	Mail Date	User Field1	User Field2	User Field3
1235	Brian Capasso		359 W Broad St, Gibbstown, NJ	08027	02/16/2015			
2314	Valerie Capasso		359 W Broad St, Gibbstown, NJ	08027	02/16/2015			
5678	Valerie Capasso		2314 E Albret St, Philadelphia, PA	19125	02/16/2015			

From this drill-down screen, access all available information about the mailpiece associated with the **Unique Record ID** including

- Customer Information
- Mailing Information
- ACS Delivery Information
- Mailing Details



Customer Information

Name: LUZ E CORDOBA
Business Name:
Unique Record Id: 865302670
Address: 7813 NW 75TH AVE
City, State ZIP: TAMARAC, FL 33321

Mailing Information

Mail Date: 02/19/2015
Induction Date:
Job Name: 103
Package #: 2
Branch:
Customer/Division: Fusion Client w CC

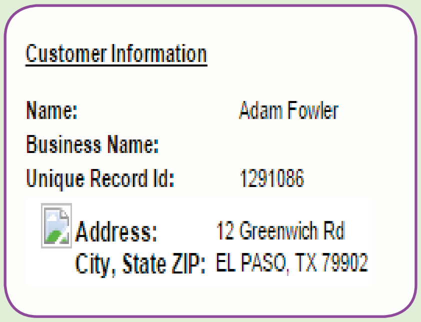
No ACS data received

Mailing Details:

No Tracking Scans received yet. Please check again later.

Customer Information

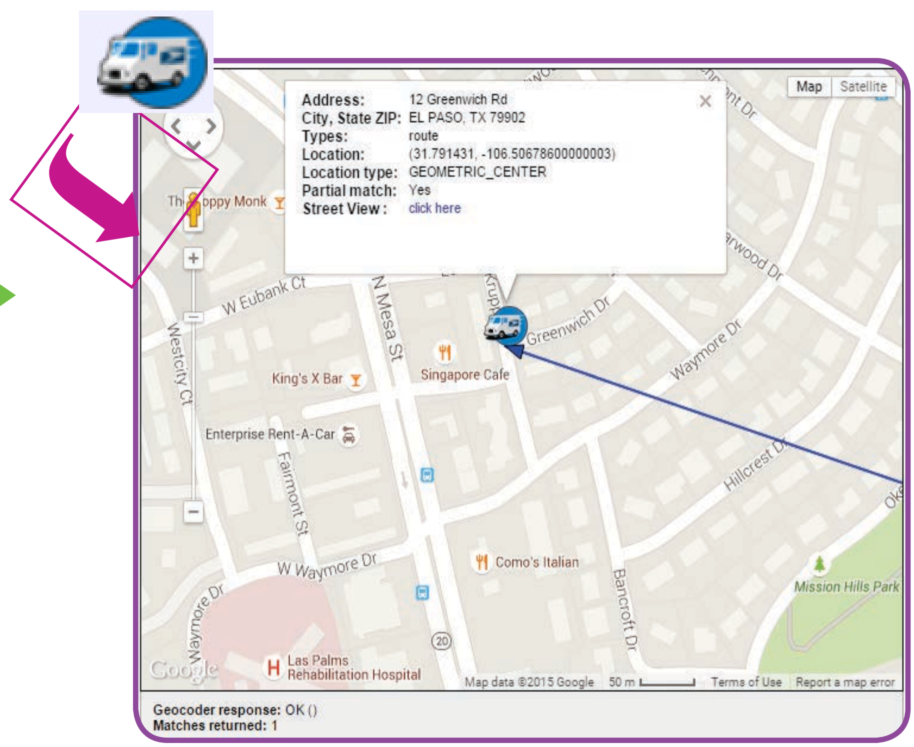
Customer Information includes the fields listed in the table on the right.



Field	Content
Name	The name of the addressee included in the mailpiece record
Business Name	The name of the business included in the mailpiece record
Unique Record ID	The unique identifier assigned by the mail owner to identify this mailpiece
Address	The street address included in the mail-piece record
City, State, ZIP	The city, state and ZIP Code included in the mailpiece record

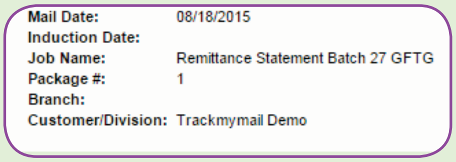
The mail truck icon, when clicked, allows you to view the location of the address on the map displayed at the bottom of that screen.

While on the map, use **Street View: click here** to see the actual street on which the address is located.



Mailing Information

Mailing Information includes the fields listed in the table on the right.



Field	Content
Mail Date	The date entered when the job was set up in PrecisionTrack.
Induction Date	The date provided by you or your clients as to when the mail entered the postal system.
Job Name	The job name entered when the job was set up in PrecisionTrack.
Package #	The package number entered when the job was set up in TrackMyMail.
Branch	The branch entered when the job was set up in PrecisionTrack.
Customer/Division	The name of the customer or division associated with this mailpiece when set up in PrecisionTrack.

ACS Delivery Information

If new information was available, the ACS delivery information is presented below **Customer Information**. Click on the truck icon to view a map displaying the location of the new address. From this map, click **Street View** to see the image of the actual house at the new street address.

Mailing Details

The next section of information contains detailed information about the mailpiece. A breakdown of each area of information presented is detailed in the table to the right.

Mailing Details:

Mailpiece Destination	Scan Date/Time	Scan Site ZIP	Scan City/State	Activity	Travel Days	Container Type
El Paso TX 79902-3527-11	Aug 18 2015 9:04PM	28228	Charlotte NC	Left original USPS facility	0	Mailpiece
El Paso TX 79902-3527-11	Aug 18 2015 9:04PM	28228	Charlotte NC	Left original USPS facility	0	Mailpiece
El Paso TX 79902-3527-11	Aug 18 2015 11:06PM	28228	Charlotte NC	In Transit	0	Mailpiece
El Paso TX 79902-3527-11	Aug 18 2015 11:06PM	28228	Charlotte NC	In Transit	0	Mailpiece
El Paso TX 79902-3527-11	Aug 18 2015 11:06PM	28228	Charlotte NC	In Transit	0	Mailpiece
El Paso TX 79902-3527-11	Aug 20 2015 7:46PM	79910	El Paso TX	In Transit	2	Mailpiece
El Paso TX 79902-3527-11	Aug 20 2015 7:46PM	79910	El Paso TX	In Transit	2	Mailpiece
El Paso TX 79902-3527-11	Aug 22 2015 1:53AM	79910	El Paso TX	Sorted for Delivery	4	Mailpiece
El Paso TX 79902-3527-11	Aug 22 2015 1:53AM	79910	El Paso TX	Sorted for Delivery	4	Mailpiece
El Paso TX 79902-3527-11	Aug 23 2015 5:24AM	79910	El Paso TX	Out for Delivery	5	Mailpiece
El Paso TX 79902-3527-11	Aug 23 2015 5:24AM	79910	El Paso TX	Out for Delivery	5	Mailpiece

Field	Content
Mailpiece Destination	Shows all destinations at which the mailpiece has been scanned.
Scan Date/Time	Shows the date and time the scan occurred.
Scan Site ZIP	Shows the ZIP Code for the site at which the mailpiece was scanned.
Scan City/State	Shows the city and state in which the mailpiece was scanned.
Activity	Shows the status associated with each scan, such as In Transit, Sorted for Delivery, Out for Delivery and others.
Travel Days	Shows the number of days elapsed since the mailpiece was entered into the postal system; calculated from the induction date.
Container Type	Shows level of unit being scanned; examples are pallet, tray/sack, mail-piece.

Map

Using Google Maps, a map is provided showing the location and status of the mailpiece as it is scanned in the system. Click on the mail truck icon to see detailed information about the mailpiece. The following options for map viewing are available by clicking on the buttons labeled:

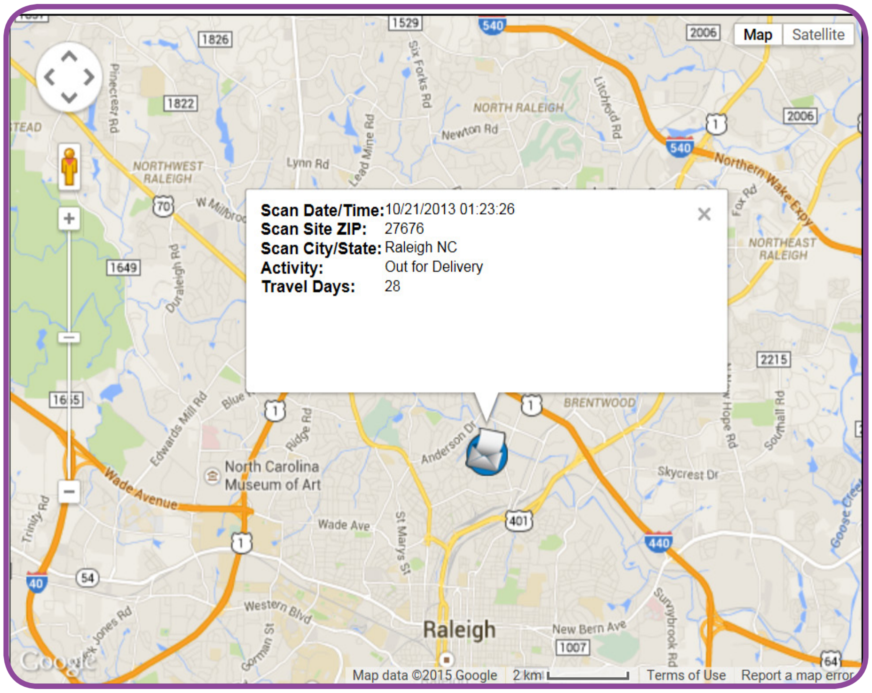
- **Map** - displays a view showing street-level map
- **Terrain** - a drop-down option available by clicking **Map**, displays a view of the map showing terrain features
- **Satellite** - displays a view showing satellite imagery
- **Labels** - a drop-down option available by clicking **Satellite**, displays the satellite view without highways, cities, counties or states identified

Using Google Maps, a map is provided showing the location and status of each mailpiece. Click on an icon (depicting a pallet, mailpiece, etc.) on the map to view the following information:

- **Scan Date/Time** – the date and time the scan occurred.
- **Scan Site ZIP** – the ZIP Code for the site at which the mailpiece was scanned.
- **Scan City/State** – the city and state in which the mailpiece was scanned.
- **Activity** – the status associated with each scan, such as In Transit, Sorted for Delivery, Out for Delivery and others; and
- **Travel Days** – the number of days elapsed since the mailpiece was entered into the postal system.

The following options for map viewing are available by clicking on the buttons labeled:

- Map - displays a view showing street-level map
- Satellite - displays a view showing satellite imagery



7

Admin Tab

In this Chapter

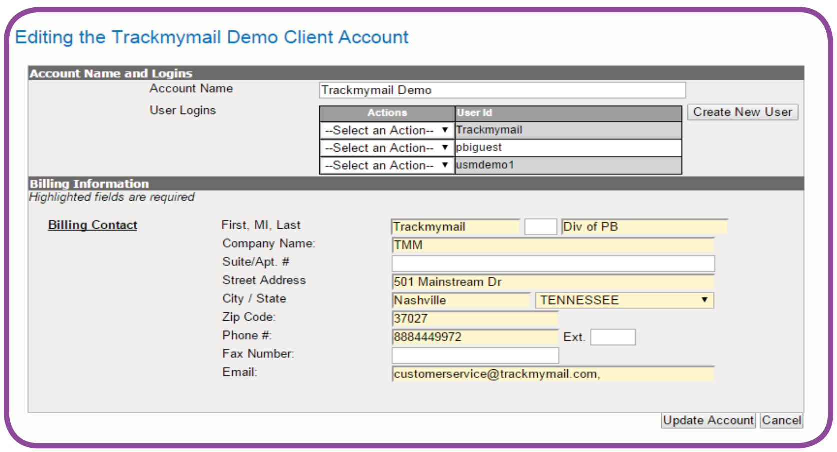
From the drop-down menu, you may have access to the following functions. Access to the functions is permission based by User ID.

- Edit Profile
- Manage Accounts
- Client List

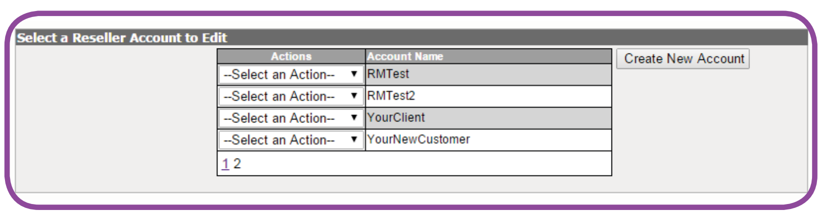
If you log in as an Administrator, you will be directed to the **User Search** function. A separate guide that defines and outlines the **Admin** screens is available.

All other users may select **Edit Profile** or **Manage Accounts**, based on availability. The ability to edit various fields is permission based and not all users have the ability to edit all fields.

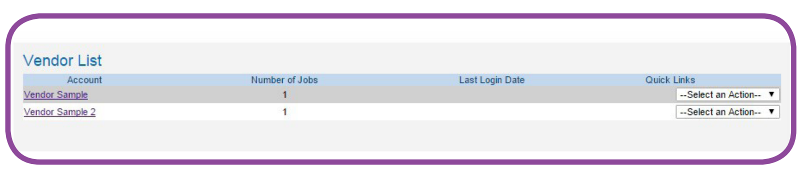
Edit Profile Screen



Manage Accounts Screen



Client List Screen

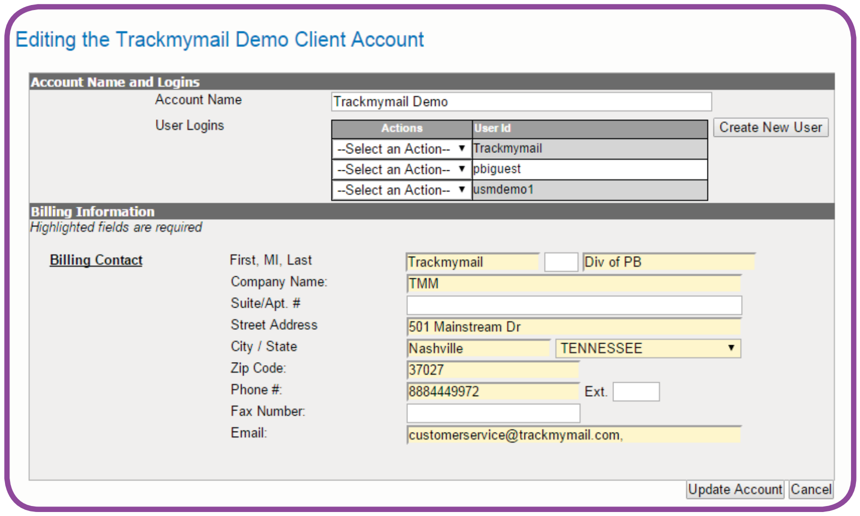


Edit Profile

The **Edit Profile** screen is used to make changes to the account associated with the logged in user. The logged in user can create a new user and edit or delete an existing user's information if permissions allow.

The **Edit Profile** link from the **Admin** tab provides several updating options for user information. The **Editing the Account Name** screen contains two section:

- **Account Name and Logins** - allows editing, deleting or adding a user.
- **Billing Information** - allows editing the billing contact information for the billing contact associated with the account.



Account Name and Logins

Account Name - the name of the Account associated with the login used.

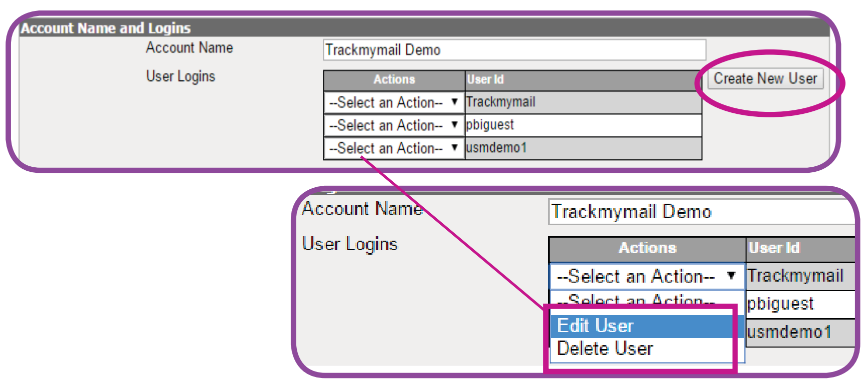
User Logins - all User Logins which you have permission to edit or delete.

- From the **Select an Action** drop-down list on the same line as the User Id being changed, choose:

  Edit User -to modify existing information about a user.

  Delete User - to delete an existing user.

  Create New User - to add a user to the account.



Edit User

The **Edit User** screen has four areas of information that can be edited:

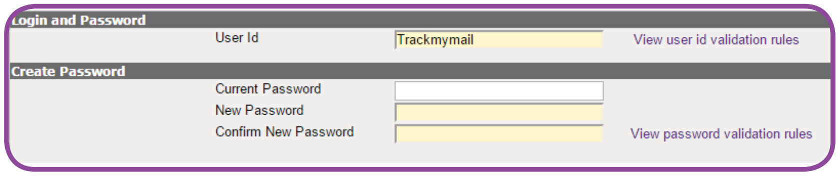
- **Login and Password** - UserId cannot be edited or changed once it is created.
- **Create Password** - enter the users current password. Create a new password and reenter the new password to confirm. **View password validation rules** displays the password rules on this screen.

- **Contact Information** -updates the information associated with the **Billing Contact** for this user. Information available for updating includes:
  - First name, middle initial and last name
  - Company Name
  - Suite/Apartment number
  - Street Address
  - City/State
  - ZIP Code
  - Phone number/extension
  - Fax number
  - Emails - multiple emails are allowed but must be separated by a comma

- **User Permissions** - adjust the permission by unchecking or checking the items this user can access/edit. Options include:
  - Create Jobs
  - Edit Jobs
  - Delete Jobs
  - View Reports Tab
  - Edit User Profile

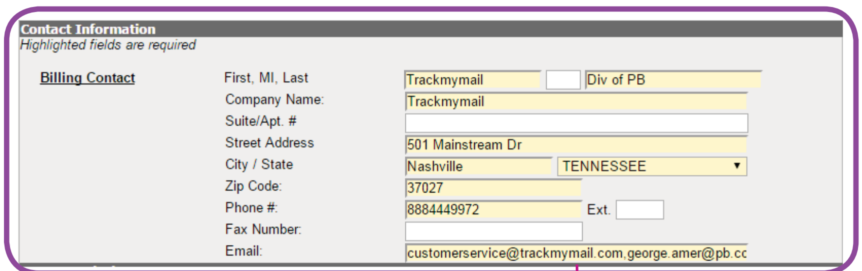
At the bottom of the screen, select **Update User** to save your edits or **Cancel** to return to the previous screen.

Login and Password and Create Password on Edit User Screen



Passwords must:
- Be between 8 and 25 characters in length;
- Contain at least one number
- Contain no more than two repeating sequential characters
- Contain only digits, characters and underscores; special characters are not allowed.

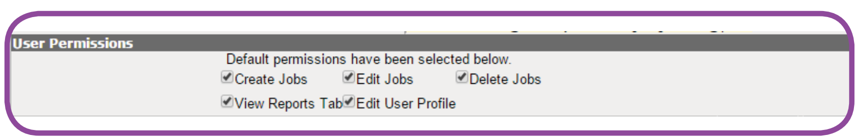
***Contact Information** on **Edit User** Screen*



Highlighted fields are required.

Add additional email addresses by separating addresses with a comma.

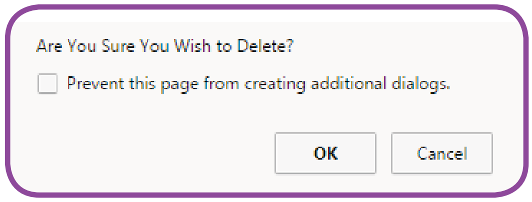
***User Permissions** on **Edit User** Screen*



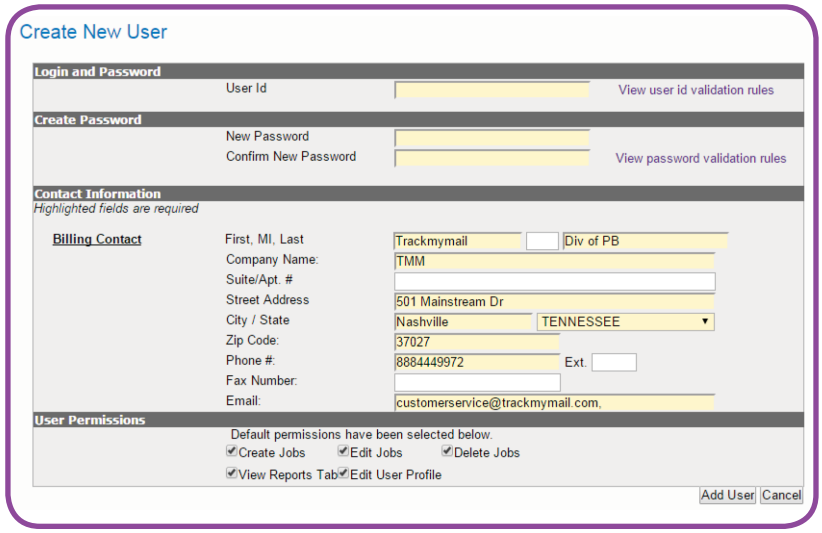
Delete User

Select **Delete User** from the **Select an Action** drop-down list. A confirmation pop up box appears. Select **OK** to delete the selected user and **Cancel** to keep the user and return to the **Action** boxes.

***Delete User** on **Edit User** Screen*



Create New User



Create New User

When creating a new user, you need to complete the same screens that are presented in the **Edit User** section above. Sections to be completed include:

- **Login and Password**
- **Create Password**

  Note: When creating a new user, there is no **Current Password** to be entered.
- **Contact Information**
- **User Permissions**

The same user id validation rules and password validation rules used in Edit User apply to Create New User

At the bottom of the screen, select **Add User** to keep the information and generate a new user or **Cancel** to return to the previous screen.

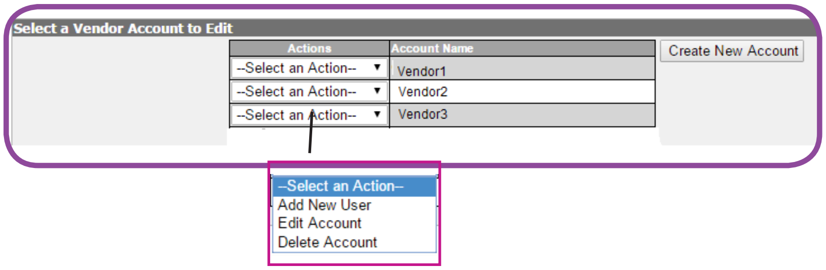
Manage Accounts

The **Manage Accounts** screen is used to add and change information at the account level. Add a new user to an existing account, edit an existing account's information and delete an existing account. From this screen, a new account can also be created. Access to these options is permission based and may not be available to all users.

From the **Select an Action** drop-down list, choose which action to performed:

- **Add New User**
- **Edit Account**
- **Delete Account**

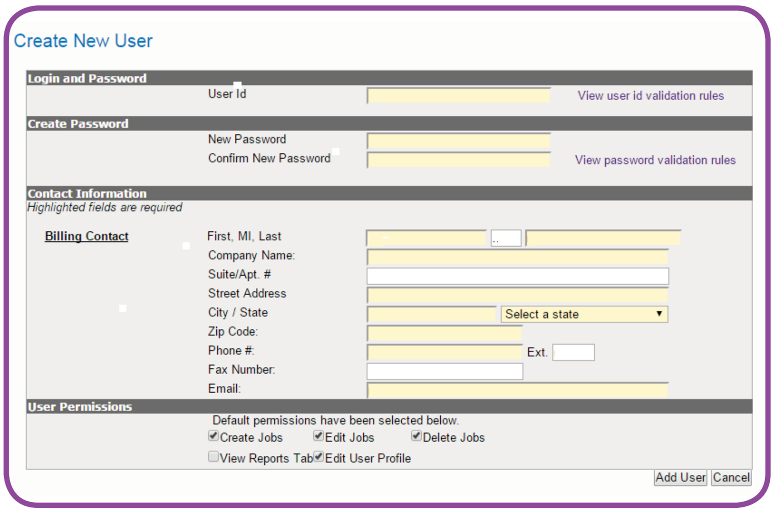
Manage Accounts



Add New User

This action adds a new user under the account associated with your login. When adding a new user, the following sections must be completed.

Create New User



- **Login and Password** - must follow the rules stated in **View user id validation rules.**
- **Create Password** - enter a new password and reenter the new password to confirm. **View password validation rules** displays the rules for creating a password.

User Id must:

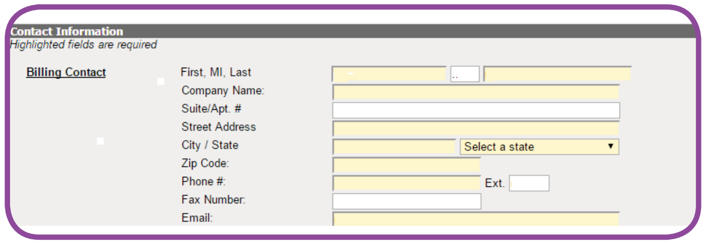
- Be between 8 and 25 characters in length;
- Contain no more than three repeating sequential characters
- Contain only digits, characters, the @ symbol and periods; special characters are not allowed.

Passwords must:

- Be between 8 and 25 characters in length;
- Contain at least one number
- Contain no more than two repeating sequential characters
- Contain only digits, characters and underscores; special characters are not allowed.

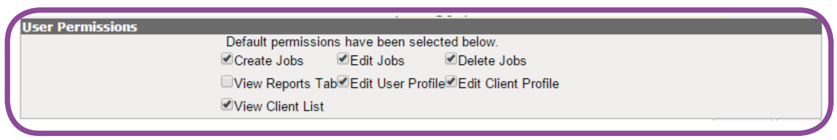
- **Contact Information** -complete the following fields with information for the **Billing Contact** for this new user:
  - First name, middle initial and last name
  - Company Name
  - Suite/Apartment number
  - Street Address
  - City/State
  - ZIP Code
  - Phone number/extension
  - Fax number
  - Emails - multiple emails are allowed but must be separated by a comma

Contact Information on Manage Accounts Create New User



- **User Permissions** - default user permissions are determined by the company and set up through TrackMyMail. For the addition of a new a user, default permissions are selected. Alter these permission by unchecking or checking the items this user can access/edit: Options include:
  - Create Jobs
  - Edit Jobs
  - Delete Jobs
  - View Reports Tab
  - Edit User Profile
  - Edit Client Profile
  - View Client List

User Permissions on Manage Accounts Create New User



At the bottom of the screen, select **Add User** to keep the information and generate a new user or **Cancel** to return to the previous screen.

Edit Account

The **Edit Account** screen provides access to reseller clients and vendor clients for editing. The **Edit Account** screen has five areas of information that can be edited:

- **Account Name and Logins**
  - **Account Name** - edit the account name associated at the account level.
  - **User Logins** - from the **Select an Action** drop-down list, choose to **Edit User** or **Delete User**.

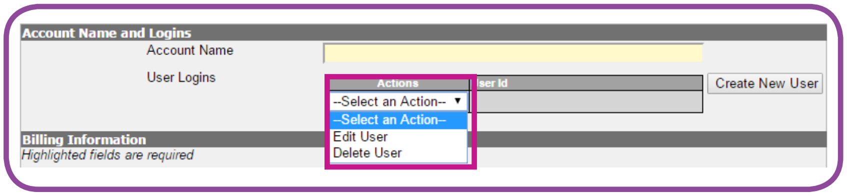
    If editing a user under this account, the information needed matches the **Manage Accounts Add New User** screens shown above.

    If deleting a user under this account, select **Delete User** and when prompted, select **OK** to delete the user or **Cancel** to return to the **Editing Account** screen.
  - **Create New User** - to create a new user under this account, the information needed matches the **Manage Accounts Add New User** screens shown above.

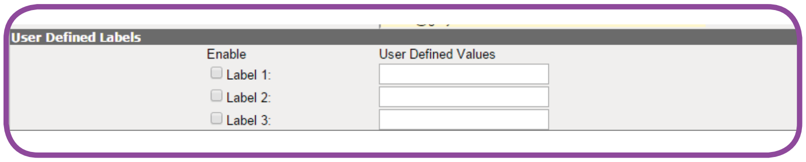
- **Billing Information** - updates the information associated with the **Billing Contact** for this account. The information needed matches the **Billing Information** for the **Add New User** screen shown above.

- **User Defined Labels** -enter labels that provide alternate names for the three User Fields populated in PrecisionTrack.

  User Fields and Labels are linked for TrackMyMail Standard Reporting purposes.



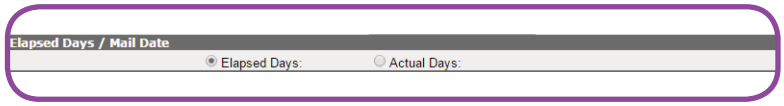
User Defined Labels are linked to User Fields 1 - 3 for TrackMyMail Standard Reports only.



- **Elapsed Days/Mail Date** - choose the method to be used for time calculations:

    - **Elapsed Days** - the number of days elapsed since the mailpiece was entered into the postal system.

    - **Actual Days** - The date entered when the job was set up in PrecisionTrack.



- **Report Settings**

    - **Late Pct. Threshold** - enter a number between 0 and 100; this number will serve as the percentage value to be used to trigger an email when the InHome window delivery percentage is less than the value entered here; this will be the late percentage threshold default for all new jobs created. It can be adjusted from the Dashboard Job Summary by clicking a specific Job number to drill down.

    - **Return Address - ZIP +4** -

        - This must be a minimum of five digits (a five-digit ZIP Code);

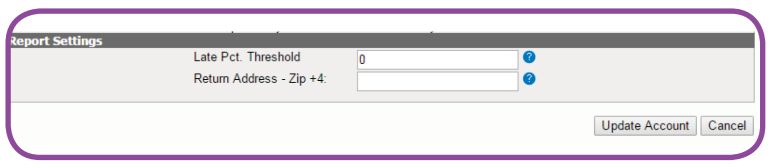
        - It must match the Origin ZIP Code entered in the PrecisionTrack job setup (the return address on the mailpieces);

        - If populated, this field reports mailpieces that are being returned by the USPS to this ZIP Code; if blank, all mail, forwarded and returned, will be reported as forwarded mail.

At the bottom of the screen, select **Update Account** to save the changes to this new user or **Cancel** to retain the existing information .

Late Pct. Threshold can be establish on the Edit Account screen or by selecting a job from the Dashboard Job Summary screen.

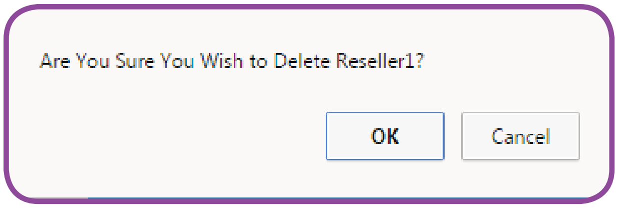
Late Pct. Threshold generates email reports with the first targeted InHome window where the percentage is less than the threshold indicated.



If Return Address - ZIP+4 is left blank, all mail (forwarded and returned) will be reported as forwarded mail in reports.

Delete Account

Select **Delete Account** from the **Select an Action** drop-down list. A confirmation box appears. Select **OK** to delete the selected user and **Cancel** to keep the user and return to the previous page.

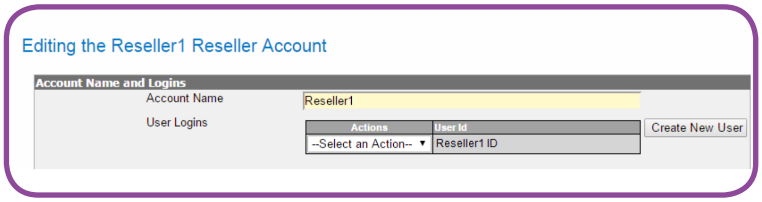


Create New Account

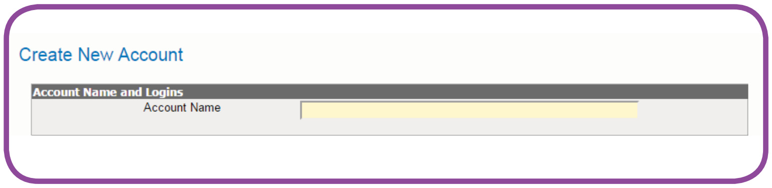
To create a new account, follow the steps above for Edit Account. With the exception of the first step, **Account Name and Logins**, all steps are the same. Since you are creating a new account, there are no logins to associated with the account until it's created.

At the bottom of the screen, select **Update Account** to save the changes to this new user or **Cancel** to retain the existing information .

Edit Account contains User Logins:



Create New Account requires only an Account Name:



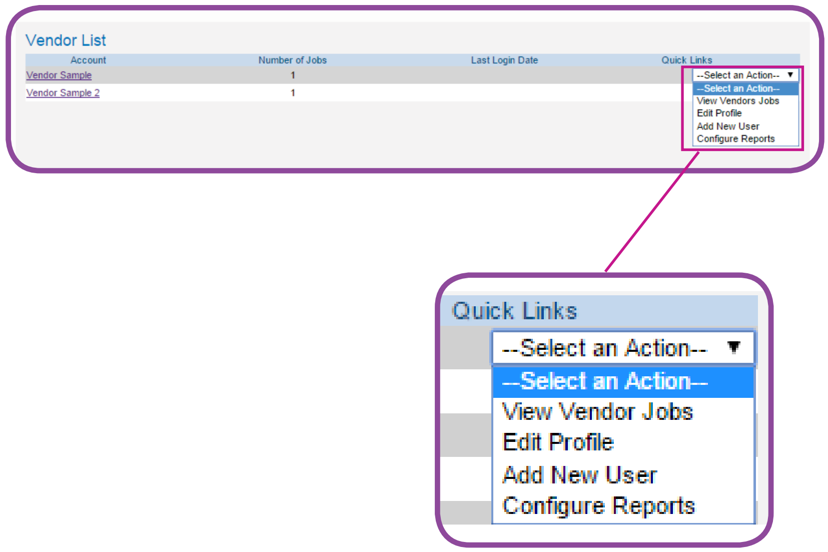
Client List

When logged in as a Vendormaster, the **Client List** link from the **Admin** tab provides access to a **Vendor List**. From this screen, you can see all vendors associated with the logged in account and have access to all jobs processed for that account.

he following information is available on the **Vendor List** screen:

- **Account** - displays the names of vendors processing jobs for the account
- **Number of Jobs** - displays the numbers of jobs processed by that specific vendor
- **Last Login Date** - displays the most recent date on which any user associated with that vendor's account logged in to TrackMyMail
- **Quick Links** - provides permission-based access based on the vendor (not all vendors see all links) to the following links:
    - **View Vendor Jobs** - links to the **Job Summary** screen on the **Dashboard**
    - **Edit Profile** - links to **Create New Account** from the **Admin**, **Manage Accounts** screen.
    - **Add New User** - links to **Create New User** from the **Edit Account** screen.
    - **Configure Reports -** links to **Run Reports** from the **Run Jobs** tab.

The **Client List** screen accesses a list of all vendors associated with the logged in user. The user can view all jobs processed by all vendors associated with the logged in account. Quick links provide access to job summary information, allow the logged in user to edit account profiles including creating new accounts, add new users and configure reports. Access to these options is permission based and may not be available to all users.



8 Help

In this Chapter

Help

The **Help** tab provides access to the TrackMyMail User Guide and Quick Start. The guide provides detailed information on the contents of each TrackMyMail tab.

A link is also provided to TrackMyMail Customer Service.

Logout

Click the **Logout** tab to leave the application.