



Ship & Mail
Mailing Software

Relay Unify TrackMyMail®

User Guide

US English Edition
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Table of Contents

INTRODUCTION	4
TRACKMYMAIL	4
TRACKMYMAIL SET UP	5
PROFILES:	5
PROFILE SETTINGS:	7
TRACKMYMAIL CONFIGURATION:	7
REMOTE FILE DELIVERY SETTINGS CONFIGURATION:	9
EMAIL NOTIFICATION SETTINGS CONFIGURATION:	11
SUBMISSION LEVEL SETUP:	12
UCONTROL	17
POSSIBLE RESULTS:	19

Introduction

TrackMyMail® (TMM) is a Pitney Bowes solution providing subscribers in-depth reporting for USPS services enabled by the Intelligent Mail Barcode, primarily Informed Visibility (tracking) and Address Change Service (ACS). Our solution is integrated with several Pitney Bowes software products, where transactional mailers in many different verticals can benefit from this level of visibility- including those in healthcare, financial and insurance. Mail service providers are also high-volume users of this service. Requirements listed below reflect our client's needs across this broad spectrum of users.

TrackMyMail

TrackMyMail is used to create a CSV file that has 1 header record, and multiple detail records for a submission that has been processed through address cleansing. The CSV file is uploaded to an SFTP site for further processing.

TrackMyMail Set Up Profiles:

Under the Global Settings option at the top of the Dashboard, select the Postal Settings dropdown > TrackMyMail tab.

Once navigated to the TrackMyMail tab, there will be two tabs at the top. One for setting up one or multiple Profiles, and one for setting up the TrackMyMail Configuration.

POSTAL SETTINGS - TRACK MY MAIL

Global Settings

Track My Mail Profiles | Track My Mail Configuration

TRACK MY MAIL PROFILES / IDENTITY

ID	DESCRIPTION	USER ID	CONFIRMATION EMAIL	NOTIFICATION EMAIL
1	John Test	jwhite@transfrm.com	jwhite@transfrm.com	jwhite@transfrm.com
3	Tyler TMM	TylerM	tylerm@transfrm.com	tylerm@transfrm.com

+ Add Profile

View History

Setup | Postal Settings - Track My Mail

Manage Track My Mail Profiles

Back to Dashboard

- Monitor Services
- Processes & Directories
- Business Classifications
- Consumables
- Print Settings
- Postal Settings
- IMB Configuration
- Cleansing Templates
- Presort Templates
- Mailing / Shipping Templates
- Track My Mail
- SLA Management
- Email Tracking (Mandrill)
- Locations
- Ticket Templates
- Reports
- Web Settings
- uDeliver
- uCampaign Management
- uSecure
- Activation Codes
- Email Settings

To set up a new profile, click on the **+ Add Profile** button. Next there will be a pop-up window to enter all of the required information.

Create Track My Mail Profile

Description

User ID

Confirmation Email

Notification Email

☐ This Profile can create multi-version jobs

Save

Close

Here is an example of setting up a Profile:

Create Track My Mail Profile

Description

User ID

Confirmation Email

Notification Email

☒ This Profile can create multi-version jobs

Save

Close

Profile Settings:

Description – This is the identifier used to select TMM on the submission type.

User ID – This is the ClientUserID for the header record. This User ID is unique to the TMM profile.

Confirmation Email – This is the ConfirmationEmail for the header record. This email address is used when sending connectivity related issue emails to the TrackMyMail service team.

Notification Email – This is the NotificationEmail for the header record. This email address is used when sending connectivity related issue emails to the TrackMyMail service team.

This Profile can create multi-version jobs – The checkbox enables/disables the Version ID override on the submission type.

TrackMyMail Configuration:

To set up the configuration for the TrackMyMail Profile, click on the TrackMyMail Configuration Tab at the top of the screen.

There will be 2 different sections to set up. One for the Remote File Delivery Settings, and one for the Email Notification Settings.

1. The Remote File Delivery Settings has the SFTP connectivity settings for uploading the CSV file.
2. The Email Notification Settings is to notify recipients if there is an SFTP connectivity failure. The TrackMyMail service team will always receive an email about connectivity failures.

Here is a sample of the TrackMyMail Configuration Tab that has been set up for step 1:

POSTAL SETTINGS - TRACK MY MAIL

Global Settings

Track My Mail ProfilesTrack My Mail Configuration

TRACK MY MAIL CONFIGURATION

REMOTE FILE DELIVERY SETTINGS

Name

Track My Mail

Protocol

SFTP

Is Active

☒

Host

sftp.sendpro360.pitneybowes.com

Port

22

Username

username

Password

Remote Folder

Timeout (sec)

10

Retry Count

3

Retry Delay (sec)

60

☐ Use Passive Mode

☒ Validate Certificate

Test Connection

EMAIL NOTIFICATION SETTINGS

☒ Enable the Failure Email Notification Event after

1

 consecutive failed connection attempts. Connectivity failures will be emailed to Track My Mail customer service.

Subject

Tyler Test

Recipients

tmahurin@transfrm.com

View HTML

Body

This is a test for Relay Unify.

AVAILABLE TAGS

#File Name#
#Output Path#
#Print Job ID#
#TMM Config#
#TMM Status#

Save

Cancel

View History

Remote File Delivery Settings Configuration:

The screenshot shows a web interface for configuring remote file delivery settings. The title is "TRACK MY MAIL CONFIGURATION". Below it, the section is "REMOTE FILE DELIVERY SETTINGS". The form contains several fields: "Name" (Track My Mail), "Protocol" (SFTP), "Is Active" (checked), "Host" (sftp.sendpro360.pitneybowes.com), "Port" (22), "Username" (username), "Password" (masked with dots), "Remote Folder" (empty), "Timeout (sec)" (10), "Retry Count" (3), "Retry Delay (sec)" (60), "Use Passive Mode" (unchecked), "Validate Certificate" (checked), and a "Test Connection" button.

TRACK MY MAIL CONFIGURATION		
REMOTE FILE DELIVERY SETTINGS		
Name	Protocol	☒ Is Active
Track My Mail	SFTP	
Host	Port	
sftp.sendpro360.pitneybowes.com	22	
Username	Password	
username	*****	
Remote Folder		
Timeout (sec)	Retry Count	Retry Delay (sec)
10	3	60
☐ Use Passive Mode	☒ Validate Certificate	Test Connection

Name – This is the remote file delivery configuration name (read only).

Protocol – This is set for SFTP (read only).

Is Active – This checkbox makes sure the configuration is active (read only).

Host – This is the configuration host (read only).

Port – This is the configuration port (read only).

Username – This is the SFTP username.

Password – This is the SFTP password.

Remote Folder – This is the configuration remote folder (read only).

Timeout (sec) – This is the configuration connect attempt timeout in seconds (read only).

Retry Count – This is the number of attempts to connect (read only).

Retry Delay (sec) – This is the number of seconds to wait before retrying to connect (read only).

Use Passive Mode – This is the SFTP connectivity option.

Validate Certificate – This is the SFTP connectivity option.

Test Connection – If the username or password is changed, the user cannot save until Test Connection confirms a good connection.



Note: Read Only sections are areas that are defined by Pitney Bowes for TrackMyMail and may only be changed by contacting Pitney Bowes.

Email Notification Settings Configuration:

The screenshot shows the 'EMAIL NOTIFICATION SETTINGS' window. At the top, there is a checkbox labeled 'Enable the Failure Email Notification Event after' which is checked. Next to it is a text input field containing the number '1', followed by the text 'consecutive failed connection attempts. Connectivity failures will be emailed to Track My Mail customer service.' Below this, there are two input fields: 'Subject' with the value 'Tyler Test' and 'Recipients' with the value 'tmahurin@transfrm.com'. A 'View HTML' button is located below the subject field. The 'Body' section contains a large text area with the text 'This is a test for Relay Unify.' To the right of the body text area is a list titled 'AVAILABLE TAGS' containing: '#File Name#', '#Output Path#', '#Print Job ID#', '#TMM Config#', and '#TMM Status#'. At the bottom of the window, there are 'Save' and 'Cancel' buttons on the left, and a 'View History' button on the right.

Enable Failure Email Notification Event After – When enabled, failure notification emails will be sent after the configured number of unsuccessful connection attempts.

Note: Failure notification emails are always sent to the TrackMyMail Service Team. Disabling this option only prevents notifications from being sent to additional recipients.

Subject – This is the subject of the failure notification email.

Recipients – These are the recipients for the failure notification email.

View HTML – This button allows user to view an HTML formatted email.



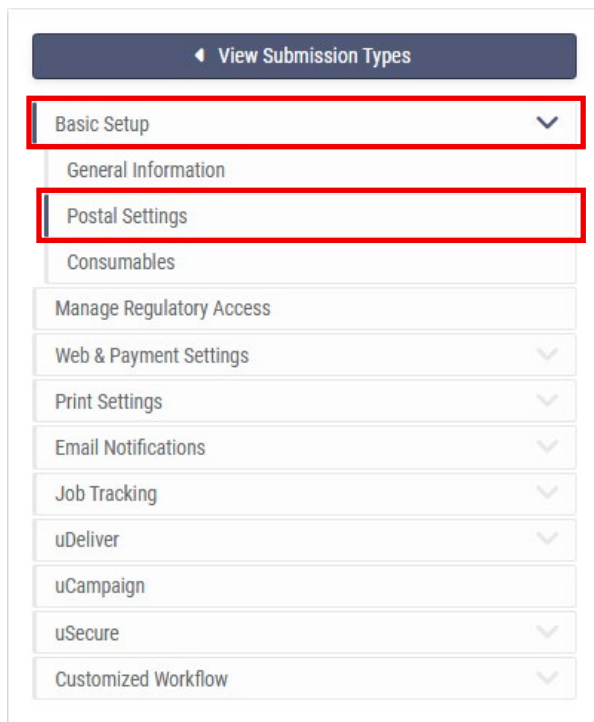
Body – This is the body for failure notification email.

This concludes the Global Settings portion of the TrackMyMail set up. The next section will outline how to add TMM at the Submission Type level.

Submission Level Setup:

Navigate to the Customer and Submission Type that will need TMM activated on.

Customer > Submission Type> Basic Setup > Postal Settings.



Once under the Postal Settings Tab, in Basic Setup of your submission, choose a Cleanse Type and IMB setup for the Send to TrackMyMail checkbox to populate.

MANAGE SUBMISSION TYPE 3017 PB 91765 TMM_Doc

CLEANSE TYPE & PRESORT

Manage Cleanse Types Global settings configuration

Cleanse Type
CRM CASS

Manage Presort Types Global settings configuration

Presort Type

☐ Enable Presort Labels

☒ Send to Track My Mail

Manage IMB Configuration Global settings configuration

ADDRESS IMB

IMB
Test New IMB

☐ Overrides Default

Service Type

Barcode Id
00 DEFAULT / NO OEL INFORMATION

RETURN IMB

IMB
Test New IMB

☐ Overrides Default

Service Type

Barcode Id
00 DEFAULT / NO OEL INFORMATION

Save View History

Both a Cleanse Type and IMB setup (Red Boxes) are required for TrackMyMail to become available (Green Box) in the Cleanse Type & Presort window. Both the Cleanse Type and IMB are set up separately in Global Settings prior to activating TMM for a particular Submission Type.

Once the checkbox is checked for **Send to TrackMyMail** as seen in the Green Box below, the TMM options for this submission will become available as shown by the Red Box below.

MANAGE SUBMISSION TYPE 3017 PB 91765 TMM_Doc

CLEANSE TYPE & PRESORT

Manage Cleanse Types Global settings configuration

Cleanse Type: CRM CASS

Manage Presort Types Global settings configuration

Presort Type: ☐ Enable Presort Labels

☒ **Send to Track My Mail**

Manage TMM Profile/ID Global settings configuration

TMM Profile/Identity: Tyler TMM

File Location:

Job ID:

☐ Exclude Name & Address Information

Job Title:

Customer ID Field:

Version ID:

User Defined Field 1:

Mail Date: mm/dd/yyyy

User Defined Field 2:

File Type: Inbound

User Defined Field 3:

Manage IMB Configuration Global settings configuration

ADDRESS IMB

IMB: Test New IMB

☐ Overrides Default

Service Type:

Barcode Id: 00 DEFAULT / NO OEL INFORMATION

RETURN IMB

IMB: Test New IMB

☐ Overrides Default

Service Type:

Barcode Id: 00 DEFAULT / NO OEL INFORMATION

Save **View History**

Send to TrackMyMail – This checkbox enables TrackMyMail for this submission type. This only can be selected if Cleanse Type and IMB are selected.

☐ Send to Track My Mail

Manage TMM Profile/ID – This button navigates to the TMM profile configuration in Global Settings.

TMM Profile/Identity – This is the TMM profile you want to use on this submission type.

TMM Profile/Identity

John Test

John Test

Job ID – This will override for the header record JobID, which defaults to submission ID.

Job Title – This will override for the header record JobTitle, which defaults to submission description.

Version ID – This will override for the header record VersionID. Must be enabled on the TMM profile.

☒ This Profile can create multi-version jobs

Mail Date – This will override for the header record Mail Date.

File Type – The header record (O)utbound Only, (I)nbound Only, (R)ound Trip.

File Type

Inbound

Inbound

Outbound

Round Trip

File Location – This is the location the TMM file will be created.

Exclude Name & Address Information – Check this box to prevent address information from being output to the TMM file.

Customer ID Field – This is where the CustomerUniqueID value will be retrieved from for the detail record.

Note: The Customer ID Field, and User Defined Field 1,2, and 3 all have the same options in their respective dropdown menus. These options are all listed below.

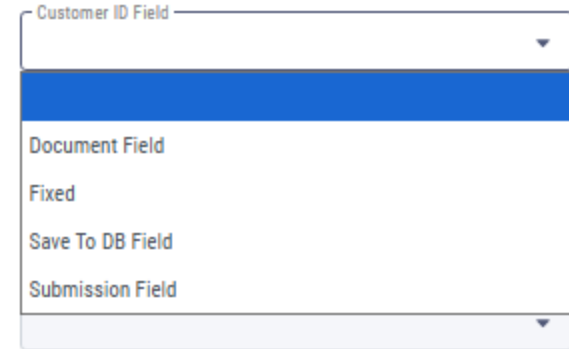
These 4 options are available for the “**User Defined Field**” 1-3:

Document Field: Document Field comes from the document.

Fixed: Fixed value is typed in and goes in as a fixed value.

Save To DB Field: Save To DB Field comes from a defined SavetoDB Field in the map.

Submission Field: Submission Field comes from the submission.

A screenshot of a web application interface showing a dropdown menu. The dropdown is titled "Customer ID Field" and is currently open, displaying four options: "Document Field", "Fixed", "Save To DB Field", and "Submission Field". The "Document Field" option is highlighted with a blue background. The dropdown menu has a small downward arrow icon at the bottom right.

User Defined Field 1 – This field specifies the source from which the detail record's UserDefined1 value is retrieved.

User Defined Field 2 – This field specifies the source from which the detail record's UserDefined2 value is retrieved.

User Defined Field 3 – This field specifies the source from which the detail record's UserDefined3 value is retrieved.

uControl

After a submission is processed through Relay Unify with TrackMyMail (TMM) enabled, it can be monitored throughout the workflow in uControl, including the **View Submissions**, **View Jobs**, and **View Print Jobs** sections.

Relay™ Unify
Powered by Transformations

SETTINGSVIEW SUBMISSIONSVIEW JOBSVIEW PRINT JOBSPRODUCTION SCHEDULE

administrator

Control | Print Jobs Management
Search Print Jobs & View Details

Enterprise | Warhammer SupportChange Context

FILTERS

COMMON FILTERS

Print Job Status
All

Location
All

Print Job Id

Apply FilterReset Filter

Save SettingsReset Settings

SETTINGS

Auto RefreshInterval 10Refresh

Records to DisplayTotal 50Apply

Reports

PRINT JOB ID	JOB ID	PRINTER NAME	STATUS	FILTER	PAGE CNT FILTER	ORDER
3688	461964	Uluro Native PDF Output	Manager	isnull(mailtype6,) = " and (isnull(eStatement,N) = 'N')	paperpagecnt >= 1 and paperpagecnt <= 9999	Cast(Pieceno as integ...
3687	461963	Uluro Native PDF Output	Manager	isnull(mailtype6,) = " and (isnull(eStatement,N) = 'N')	paperpagecnt >= 1 and paperpagecnt <= 9999	Cast(Pieceno as integer)
3686	461961	Uluro Native PDF Output	Manager	isnull(mailtype6,) = " and (isnull(eStatement,N) = 'N')	paperpagecnt >= 1 and paperpagecnt <= 9999	Cast(Pieceno as integer)
3680	461954	Uluro Native PDF Output	Manager	mailtype6 = 'X' and (isnull(eStatement,N) = 'N') and (MailType1 Like 'W')	paperpagecnt >= 1 and paperpagecnt <= 99999	Cast(Pieceno as integer)
3679	461954	Uluro Native PDF Output	Error	isnull(mailtype6,) = " and (isnull(eStatement,N) = 'N')	paperpagecnt >= 1 and paperpagecnt <= 9999	Cast(Pieceno as integer)
3674	461949	Uluro Native PDF Output	Print Manager	isnull(mailtype6,) = " and (isnull(eStatement,N) = 'N')	paperpagecnt >= 1 and paperpagecnt <= 9999	Cast(Pieceno as integer)
3672	461947	Uluro Native PDF Output	Print Manager	isnull(mailtype6,) = " and (isnull(eStatement,N) = 'N')	paperpagecnt >= 1 and paperpagecnt <= 9999	Docno
3671	461947	Uluro Native PDF Output	Print Manager	isnull(mailtype6,) = " and (isnull(eStatement,N) = 'N')	paperpagecnt >= 1 and paperpagecnt <= 9999	Cast(Pieceno as integer)
3670	461946	Uluro Native PDF Output	Complete	Docno >= 1 and Docno <= 567 and (isnull(eStatement,N) = 'N')	paperpagecnt = 1 and isnull(mailtype6,) = "	Cast(Pieceno as integer)
3669	461946	Uluro Native PDF Output	Print Manager	isnull(mailtype6,) = " and (isnull(eStatement,N) = 'N')	paperpagecnt >= 1 and paperpagecnt <= 9999	Cast(Pieceno as integer)
3668	461945	Uluro Native PDF Output	Insert Complete	isnull(mailtype6,) = " and (isnull(eStatement,N) = 'N')	paperpagecnt >= 1 and paperpagecnt <= 9999	Cast(Pieceno as integer)
3667	461944	Uluro Native PDF Output	Print Manager	isnull(mailtype6,) = " and (isnull(eStatement,N) = 'N')	paperpagecnt >= 1 and paperpagecnt <= 9999	Cast(Pieceno as integer)
3666	461942	Uluro Native PDF Output	Complete	Docno >= 1 and Docno <= 567 and (isnull(eStatement,N) = 'N')	paperpagecnt = 1 and isnull(mailtype6,) = "	Cast(Pieceno as integer)
3665	461942	Uluro Native PDF Output	Complete	Docno >= 1 and Docno <= 567 and (isnull(eStatement,N) = 'N')	paperpagecnt = 1 and isnull(mailtype6,) = "	Cast(Pieceno as integer)
3664	461910	Uluro Native PDF Output	Complete	Docno >= 1 and Docno <= 567 and (isnull(eStatement,N) = 'N')	paperpagecnt = 1 and isnull(mailtype6,) = "	Cast(Pieceno as integer)

FirstPrev1234NextLast

To verify that a TrackMyMail (TMM) file has been created, select the submission in uControl under the View Print Jobs Tab, right-click, and choose **View Details**. From the **Select Details** dropdown, choose **Transactions**, then scroll through the transaction list to locate the TMM file creation entry.

PRINT JOB DETAILS
REFRESH
PRINT AUDIT REPORT

PRINT JOBS ▶ PRINT JOB 3688

PRINT JOB DETAILS

PRINT JOB ID: 3688
STATUS: Print Manager
FILTER: isnull(mailtype6,'') = '' and (isnull(eStatement,'N') = 'N')
ORDER: Cast(Piecenno as integer)

JOB ID: 461964
PRINTER NAME: Uluro Native PDF Output
PAGE CNT FILTER: paperpagecnt >= 1 and paperpagecnt <= 9999
PAGE FILE: \\warhammer\Submit\PDF\[<#CustName>_<#subtypename>_<#jobid>_<#prtjobid>_<#OrgFilename>.pdf

PRINT JOB TRANSACTION DETAIL

Select Details
Submissions
Submissions
Documents
Transactions

SUB ID	DESCRIPTION	# DOCS	# PAGES	ORG FILE NAME	RECEIVE DATE
5720	TMM Testing	567	567	BCCNCOATest	5/22/2026 11:13:50 AM

PRINT JOB TRANSACTION DETAIL

Select Details
Transactions

TRANSACTIONS

TRANSACTION DATE	DESCRIPTION	STATUS
5/22/2026 11:16:03 AM	Document 7543593 TMM required field RoutingCode is blank.	
5/22/2026 11:16:03 AM	Document 7543607 TMM required field RoutingCode is blank.	
5/22/2026 11:16:03 AM	Track My Mail file created	
5/22/2026 11:16:03 AM	Writing to PrintQueue	
5/22/2026 11:16:03 AM	Print Queue 73381 Update Complete	
5/22/2026 11:16:03 AM	Print Manager	

Possible Results:

1. If a document does not have required field data, it will be listed in the transaction log via the View Print Jobs Tab.
2. A TMM file is generated and uploaded.
3. Connectivity issues will generate an email notification to the TMM team. A sample notification is shown below:

Recipient
TMMCustomerService@pb.com

Subject
Error Connecting

Body
Error Connecting To Track My Mail
Confirmation Email - Confirmation email from TMM profile
Notification Email - Notification email from TMM profile