



Relay Unify uDeliver

User Guide

US English Edition
January 2026

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Introduction

Relay Unify uDeliver lets you manage and synchronize your multi-channel e-delivery, e-payment and marketing campaigns with your traditional print mailings. Seamlessly deliver bills and statements, printed inserts, variable images, videos, and web ads from a single integrated platform.

HTML Delivery

- E-delivery via a HTML-based or text-based email with an attached PDF document or a link to customer web portal.
- Fully customize email templates within the Relay™ Unify, Powered by Transformations HTML Email Editor.
- Pull selected message detail from data owner input files.
- Selectively insert tags such as variables and other system fields from within the Relay Unify data library.
- Provide complete flexibility with multiple delivery scheduling options.
- Track when emails are sent, received and opened.
- Automatically send follow up emails or transfer end-users back to print delivery if emails are not opened or documents are not viewed.
- Select and send trans-promotional inserts or web ads.
- Incorporate hyperlinks to drive traffic to preferred end destination for marketing or payment purposes.

SMS

- Build custom messages within the Relay Unify Template Editor.
- Pull selected message detail from customer input data.
- Include system variables or mapped fields from within the Relay Unify data library.
- Design communication campaigns utilizing a series of templates.
- Includes End User Opt-In feature.
- Customize delivery schedules based on business rules.
- Business rules can include custom date ranges, days/hour calculations, time zones, and more.
- Customize end user keyword responses to generate secondary events.
- Compose follow-up messages based on responses.
- Ability to initiate bill payment for selected end users.

Contacts

Relay Unify integrates directly with best-in-class systems for eDelivery.

SMS – Sinch MessageMedia

Their industry leading technology provides a secure, flexible solution using an extremely reliable infrastructure with broad coverage within and outside of the US and contracts with all US phone companies to ensure reliable service and low cost. Sinch MessageMedia Provides an industry leading SMS service in security, reliability, speed and capacity.

Sinch MessageMedia Contact Information	
Contact Name:	Rich Hay, Senior Account Executive
Address:	461 Pacific Ave. San Francisco, CA 94133
Phone:	415-652-1082
Email:	Richard.hay@message media.com
Website:	https://www.sinch.com

Implementation Summary

1. Contact Message Media to receive your credentials.
2. Contact Message Technologies to receive your credentials.
3. Enter your global/customer level credentials into uSetup.
4. Create your HTML/SMS templates.
5. Load in your template or create a new HTML/SMS event for a submission type.
6. Set up email events.

Run a data file to start receiving messages!

Global Settings

Permissions: User Maintenance

For the Relay Unify uDeliver options to be available for the Relay Unify user, those settings must be checked with the View User button. If not checked, the Global Settings menu items will be grayed out, and the client level buttons on the far left of uSetup's main screen will also be grayed out.

Relay™ Unify
Powered by Transformations

GLOBAL SETTINGS

MANAGE CUSTOMERS

◀ View Submission Types

Basic Setup

Manage Regulatory Access

Web Settings

Print Settings

Email Notifications

Job Tracking

uDeliver

Email Setup

SMS Setup

Daily Schedule Email

uCampaign

uSecure

Customized Workflow

◀ Back to Dashboard

Monitor Services

Processes & Directories

Business Classifications

Consumables

Print Settings

Postal Settings

SLA Management

Email Tracking (Mandrill)

Locations

Ticket Templates

Reports

Web Settings

uDeliver

Email Configuration

SMS Configuration

Keyword Meanings

Reports

uCampaign Management

uSecure

Activation Codes

Email Settings

GENERAL INFORMATION

130 Relay Unify Web4

Q 240 PBW4_Gas

⌵

Submission Type

PBW4_Gas

Description

Relay Unify Web4 Gas

Status

Active

REGULATORY ACCESS

The following regulatory access categories have been applied to this submission type. You can manage regulatory access settings for this submission type by selected "Manage Regulatory Access" from the menu.

NONE

Location

Connecticut

Submission Priority

Same Day

INCOMING DATA (FILE RECEIPT)

FTP Directory

✓

FTP

\\TRANS-QA3\Submit\FTP\Tyler PBWeb4\Gas\

📄

Web Directory

✓

Web

\\TRANS-QA3\Submit\WEB\Tyler PBWeb4\Gas\

📄

Email Directory

☐

Email

📄

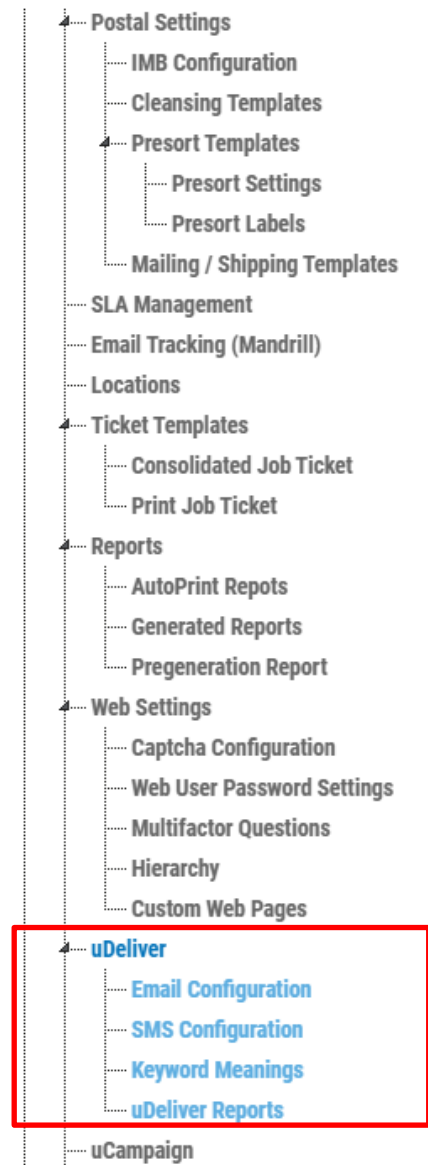
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On the Dashboard in uSetup, select View User. Select a user from the Relay Unify users already created. Go to Feature Permissions and select from Relay Unify uDeliver in the proper location.



Setting up Credentials Globally

Email

Email credentials are setup up only at the client level, unless using Mandrill. These settings can be setup globally under Global Settings > Email Tracking (Mandrill).

Enter the credentials received from Mandrill:

- API Key
- Web Hook Key
- Dedicated IP
- Custom Quota
- Charge

Enable Tracking – Check this to have the ability to track individual email events.

EMAIL TRACKING (MANDRILL) Global Settings

SETTINGS

API Key

Web Hook Key

Dedicated IP

Custom Quota
0

Charge: 0.00 Status: per 1000

☐ Enable Tracking ⓘ

Save View History

SMS

The global SMS credentials can be set up under Global Settings > Relay Unify uDeliver > SMS Configuration.

Use Secure Gateway – If checked, it uses https. If this is unchecked, it uses http.

Enable Message Tracking – If this is checked, the SMS Service will check for delivery of the messages and set the message status accordingly. This is an additional service from MessageMedia.

Account User – Account User ID issued by SMS Provider.

Account Password – Password issued by SMS Provider.

Email Recipient when at minimum – Enter the email address of the person that should receive an email when the SMS Provider account balance goes below the minimum.

Minimum Remaining – The point at which an email is sent when the account balance goes below this point.

Email Profile – SQL Mail Profile used to send the email. The email profiles are set up per client.

Account Balance – The actual account balance as of the last check from the SMS Service.

Default Time Zone – Time zone where the application and SMS service is running.

The screenshot displays the 'UDELIVER - SMS CONFIGURATION' interface. At the top, there is a header bar with a gear icon, the text 'UDELIVER - SMS CONFIGURATION', and a 'Global Settings' button. Below the header, there are two tabs: 'SMS Settings' (active) and 'SMS Templates'. The 'SMS SETTINGS' tab contains a form with the following fields and controls:

- Use Secure Gateway:** A checked checkbox.
- Enable Message Tracking:** A checked checkbox.
- Account User:** A text input field containing 'Pitney Bowes'.
- Account Password:** A password input field with masked characters and an eye icon for toggling visibility.
- Email Profile:** A dropdown menu showing 'Tyler Training'.
- Email Recipient when at minimum:** A text input field containing 'pb@pb.com'.
- Minimum Remaining:** A text input field containing '250'.
- Account Balance:** A text input field containing '5000'.
- Default Time Zone:** A dropdown menu showing 'Eastern Standard Time (North America)'.

At the bottom of the form, there are two buttons: 'Save' and 'View History'.

Global Keywords

These global keywords can be accessed from Global Settings under the Relay Unify Deliver Tab to the Keyword Meanings Tab.

The Meanings defined here are linked to keywords when setting up templates and events. Certain meanings will initiate certain activities.

Cancel – This will cancel any future messages for the same phone/mobile number and submission.

Confirm – This will cancel any future messages for the same phone/mobile number and submission.

Continue – This is used to create a start message where the user will press a key to read the rest of the message.

No – Logs a response of No.

Opt Out – This will mark a user's web account as not wanting SMS Messages and will cancel any future messages for the same phone number and submission.

Yes – Logs a response of Yes.

Opt In – This will mark a user's web account as wanting to receive SMS Messages.

If a user responds with Reschedule, Cancel, or confirm, any unsent messages for that submission and phone/mobile/email will be cancelled.

KEYWORD MEANINGS

Global Settings

CONFIGURATION

ID	KEYWORD MEANING ⓘ	EMAIL	SMS
1	Cancel	☒	☒
2	Confirm	☒	☒
3	Continue	☐	☒
4	Make Payment	☐	☒
5	No	☐	☒
6	Opt Out	☒	☒
7	Repeat	☐	☐
8	Reschedule	☐	☐
9	Transfer	☐	☐
10	Yes	☐	☒

Showing 1 to 10 of 12 entries

+ Add Keyword Meaning

View History

To edit the response for a keyword, click on the **Keyword**.

Edit the text for the page and click the **</> View HTML** button to see the preview of the message.

Click Save or click Cancel to disregard the changes made.

Keywords Configuration

Keyword Meaning

Cancel

KEYWORD MEANING APPLIES TO

☒ Html Email

☒ SMS (Text) Messaging

Response Page for HTML Email

<div id="crumbWrapper">

<div id="header">

<div class="headerContent">

<h1>

Appointment Cancelled</h1>

</div></div></div>

<div id="contentMainWrapper">

<div id="content">

<div id="contentDataNoSidebar" class="pAlign">

<p>

</> VIEW HTML

Save

Close

HTML View

Appointment Cancelled

We are sorry you had to cancel your appointment.
Please contact us soon to reschedule.

Close

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Setting up Credentials at the Client Level

Email Setup

To set the email credentials for the client, select the client on the uSetup dashboard then click on the Credentials Dropdown button on the left-hand side, then Email Configuration.

Outgoing Server Settings

Host Server – This is the mail server.

Port – Enter the port.

User ID – This is the user ID for the mail server.

Password – This is the password for the mail server.

From Email Address – This is the email address the email will come from.

From Name – This is the name of who the email appears to be from.

Reply To Email – This is the email address that will receive the reply emails.

CC Email – These email addresses will be copied on the emails sent.

Blind CC Email – These email addresses will be blind copied on the emails sent.

Test Server Settings – This is only to check the credentials initially.

Once setup, click Test Settings, then Save.

Incoming Server Settings

This is only needed if data files will be sent to you via email.

Host Server – This is the mail server.

Port – Enter the port.

User ID – This is the user ID for the mail server.

Password – This is the password for the mail server.

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The screenshot displays the 'MANAGE EMAIL CONFIGURATION' interface. At the top, there's a header with a gear icon and the title. Below it, a section for 'IMPORT SETTINGS FROM CUSTOMER' includes a dropdown menu and a 'Load' button. The main content is divided into two sections: 'OUTGOING SERVER SETTINGS' and 'INCOMING SERVER SETTINGS'. The 'OUTGOING' section contains fields for Host Server, User ID (pre-filled with 'no reply'), Password (masked with dots), From Email Address (pre-filled with 'noreply@pb.com'), From Name (pre-filled with 'Relay Unify'), Reply To Email, and Blind CC Email. There's also a 'Test Server Settings' button. Below these is an 'Enable SSL' checkbox. The 'INCOMING SERVER SETTINGS' section has fields for Host Server, User ID, Password, and Forward To Email, followed by a 'Forward Emails' checkbox and an 'SQL Email Profile' field. At the bottom, there are 'Save' and 'View History' buttons.

Forward To Email – This will forward any incoming emails to the email addresses listed here.

Forward Emails – This must be checked to forward emails to the addresses above.

SQL Email Profile – Once the credentials are entered, the SQL Email Profile will be saved under the name of the customer.

Tracking

Use Global – This will use the Mandrill credentials setup under Global Settings > Email Tracking (Mandrill).

Enter the credentials received from Mandrill:

- API Key
- Web Hook Key
- Dedicated IP Address ID
- Custom Quota
- Charge

From Email Address – This is the email address the email will come from.

The screenshot shows a web interface for configuring email tracking with Mandrill. At the top, there is a header bar with a gear icon and the text "EMAIL TRACKING (MANDRILL)". Below this, the main content area is titled "EMAIL TRACKING (MANDRILL)". It contains several settings: a checkbox labeled "Use Global Settings" which is checked; a text input field for "API Key"; a text input field for "Web Hook Key"; a text input field for "Dedicated IP Address ID"; a text input field for "Custom Quota" with the value "0" and an information icon; a text input field for "Charge" with the value "0" and a dropdown menu set to "Thousand"; and a text input field for "From Email Address" with the value "noreply@pb.com". At the bottom of the form is a dark blue button with a save icon and the text "Save".

SMS

To set the SMS credentials for the client, select the client on the uSetup dashboard then click on the Credentials Dropdown > SMS Settings on the left-hand side.

Use Global – If checked, the global settings will be used for this client, which disables the remaining settings here.

Use Secure Gateway – If checked, it uses https. If this is unchecked, it uses http.

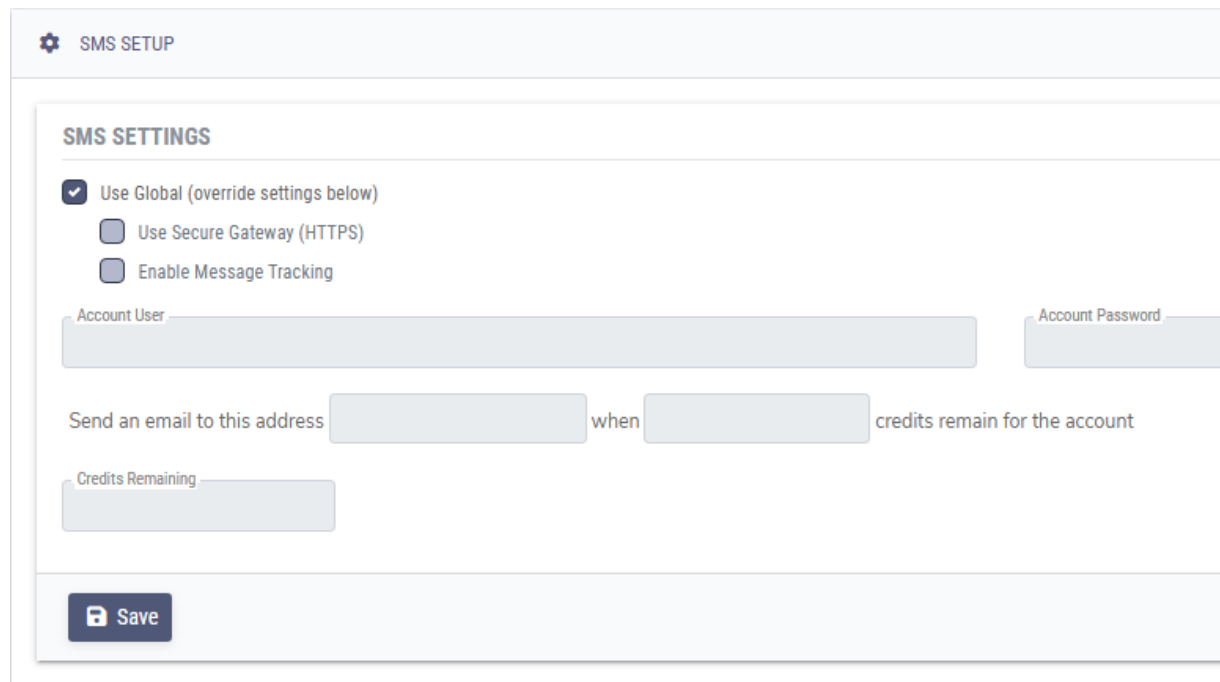
Enable Message Tracking – If this is checked, the SMS Service will check for delivery of the messages and set the message status accordingly.

Account User – Account User ID issued by SMS Provider.

Account Password – Password issued by SMS Provider.

Send Email to this address – Enter the email address of the person that should receive an email when the SMS Provider account balance goes below the minimum.

Credits Remaining – The point at which an email is sent when the account balance goes below this point.



The screenshot shows the 'SMS SETUP' configuration page. At the top, there is a header bar with a gear icon and the text 'SMS SETUP'. Below this is a section titled 'SMS SETTINGS'. Inside this section, there are three checkboxes: 'Use Global (override settings below)' which is checked, 'Use Secure Gateway (HTTPS)' which is unchecked, and 'Enable Message Tracking' which is unchecked. Below the checkboxes are two input fields: 'Account User' and 'Account Password'. Further down, there is a row of three input fields: 'Send an email to this address', 'when', and 'credits remain for the account'. Below this row is a single input field labeled 'Credits Remaining'. At the bottom of the form is a dark blue button with a white floppy disk icon and the text 'Save'.

Templates

Templates can be created for each of the two event types: Email, and SMS. The template can then be loaded into submission types and edited and customized as necessary.

Email

Under the Global Settings in uSetup, select Relay Unify uDeliver Dropdown tab > Email Configuration.

Event Description – Enter a description of the template. This will be the name of the template that will be listed in the submission type when loading in the template.

Enabled – Check to enable the template. If the template is not enabled, it will not be listed in the submission type; you will not be able to load in the template.

Subject Line – Enter the subject of the email. If using a Static message, tags can be selected from the Tags **Subject Variables** area and added by clicking on the Add button once the template is loaded into a submission type. Since the tags are submission level specific, none will be listed on the template.

Most fields have 3 different places to pull the data from.

1. Static – The data will be entered in the static field on the template.

EMAIL TEMPLATES > NEW HTML TEMPLATE ATTACHMENTS | MANAGE LINK BEHINDS

☒ Enabled ☐ Enable Tracking

Event Description
Confirm Appointment

Subject Line
Static

Subject
Please confirm your appointment.

CLICK TAG TO INSERT

#CUSTID#	#SYS_ADDR1#
#CUSTNAME#	#SYS_ADDR2#
#ORGFILENAME#	#SYS_ADDR3#
#SUBID#	#SYS_ADDR4#
#SUBNAME#	#SYS_BALANCE#
#SYS_ACCT_ID#	#SYS_CITY#

Body
Static

HTML Type
Custom

EDITOR

Email Recipient
From Web

SEND TIME

Date Key
Static

Date
mm/dd/yyyy

Time
--:--:--

Use Time Zone
None

Send
Immediate

2. System Field – The data will be pulled from a system field on the map. The system field must be selected.

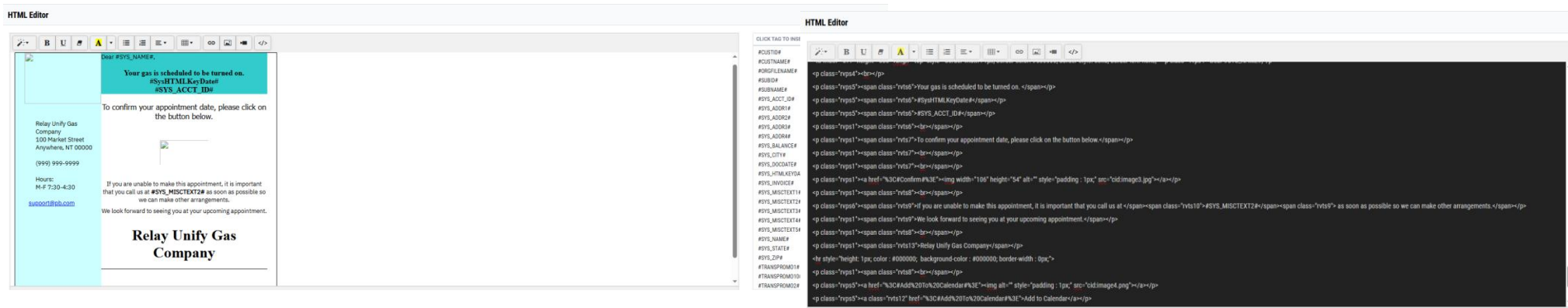
3. Mapped Field – The data will be pulled from a user field that is saved to the database in the map. The field name entered must be the same as the field name on the map.

Body – Select if the body of the email will be Static or from DocHTMLEmail. If Static is selected, then the HTML Type can be selected. If DocHTMLEmail is selected, the body for each DocID will need to be entered into the DB table using a process such as a Relay Unify Bridge job.

HTML Type – If Relay Unify, then the HTML Editor will be used. If custom, then a standard editor can be used. Click on the **Editor** button to open the editor screen.

Relay Unify Editor

Custom Editor



Enable Tracking – Check this box to turn on email tracking. This will put a tracking image into the email. When the recipient opens their email, the image will be downloaded and the email record in the database will be marked as opened. This is for use with Mandrill only.

Email Address – The email address to send the emails. If Sys_EmailAddress or another mapped field is being pulled from the data, that email will override the web email.

Date Key – The date that keys the sending of the email. If the time is in the future, the emails will not be sent until that time. If the time is in the past (default is current time of creating the template initially) then the emails will be keyed when the submission runs and all criteria in the template are met. This should be a Date field if using a field from the data.

Send Type – Select an option. If an option other than Immediate is selected, the Days/Hours before or after and the Send Time can be static or can be determined from the data. The Send Time will need to be on the format hh:mm:ss if coming from the data. Send Days/Hours Before must be numeric fields.

Immediate – send the messages immediately.

Days Before – use the **Send Days Before** field to send the messages X days before the Date Key at the **Send Time**.

Hours Before – use the **Send Hours Before** field to send the messages X hours before the Date Key.

Days After – use the **Send Days After** field to send the messages X days after the Date Key at the **Send Time**.

Hours After – use the **Send Hours After** field to send the messages X hours after the Date Key.

Email Replies To – Email address of the person to receive responses tagged as immediate that are link behinds. An event must be set up for the email to be created.

Use Time Zone – Select a time zone.

NONE – This uses the Data Key with no offset for time zone.

Standard – This uses the default time zone of the global settings. If client level settings are used, those will override the global settings for this client.

Alternate – This uses the time zone entered in the field. If this is set for PST for example, and the Date Key is 1:00 PM CST, the message will be sent at 11:00 AM PST.

System Field – This uses a system field for the time zone. Enter a valid time zone abbreviation.

Mapped Field – This uses a mapped field for the time zone. The field value must be a valid time zone abbreviation.

Always Send – Check to always send the email, even if a Cancel, Confirm or Reschedule response is received. By default, this setting is unchecked.

Send ONLY on – If Always Send is unchecked, the user can select to only send on certain responses, such as Confirm. The email will only be sent to those that reply Confirm, Cancel, or Reschedule (based on what is selected) to a different HTML Email Event.



Tips:

Time should be in military time format.

Send immediate response email event to

Static

Email Address
pb@pb.com

☒ Always send even if no response from previous message

EVENTS

EVENTS AVAILABLE

Cancel

Confirm

Opt Out

Yes

ADD EVENT →

← REMOVE EVENT

Link Behinds

Click on the Link Behinds button to add keywords for this event.

Keyword – The keyword that the email recipient will enter, causing an event to occur. This will populate when the meaning is selected. The keywords and meanings were previously set up within the global settings.

Meaning – Select the meaning of the keyword. Some meanings will cause secondary events.

Send Response email when reply received – This is how the responses to this keyword will be sent. If Immediate, an email will be sent immediately to the person set up for reply emails. If Batch, the response will only be included in the end of day batch report.

Keywords Management

Keyword

Confirm

Meaning

Confirm

How to send response email when reply received

Immediate

Response Page for HTML Email

Thank you for confirming your appointment with Relay Unify Gas.

</> VIEW HTML

SMS

Under Global Settings in uSetup, select Relay Unify uDeliver Dropdown tab > SMS Configuration.

SMS TEMPLATES ▶ **CONFIRM APPOINTMENT**MANAGE KEYWORDS

☒ Enabled☒ Opt In☐ Non-Optins ONLY

Template Description
Confirm Appointment

Text Message
Static

Message
#SYS_NAME#,
You have an appointment on #SYS_SMSKEYDATE#
Press C to Confirm your appointment or R to reschedule.

CLICK TAG TO INSERT
#SYS_DOCDATE# #SYS_MISCTEXT5#
#SYS_INVOICE# #SYS_NAME#
#SYS_MISCTEXT1# #SYS_SMSKEYDATE#
#SYS_MISCTEXT2# #SYS_STATE#
#SYS_MISCTEXT3# #SYS_ZIP#
#SYS_MISCTEXT4# #TRANSPROMO1#

Mobile #
System Field

System Field
Sys_MobilePhone

SEND TIME

Date Key
Static

Date
01/01/2025

Time
04:09:58 PM

Use Time Zone
Alternate

System Field
Eastern Standard Time (North America)

Send
Days Before

SEND DAYS BEFORE DATE KEY
Static 2

SEND TIME (format hh:mm:ss)
Static 12:00:00 PM

SEND EXCLUSION TIMES

DO NOT SEND BETWEEN (maybe with details)
Static 08:00 PM AND Static 08:00 AM

Template Description – Enter a description of the template. This will be the name of the template that will be listed in the submission type when loading in the template.

Enabled – Check to enable the template. If the template is not enabled, it will not be listed in the submission type; you will not be able to load in the template.

Text Message – The text message data. If using a Static message, tags can be selected from the Tags area and added by clicking on the **Add** button.

Most fields have 3 different places to pull the data from.

1. Static – The data will be entered in the static field on the template.
2. System Field – The data will be pulled from a system field on the map. The system field must be selected.
3. Mapped Field – The data will be pulled from a user field that is saved to the database in the map. The field name entered must be the same as the field name on the map.

Opt In – If this is checked, the message will be sent to everyone regardless of Allow SMS being checked on the web user profile. An opt-in and opt-out keyword will need to be set up.

Non-Optins ONLY – If this is checked, it will be sent to web users that don't have allow SMS checked yet and those that haven't sent an opt-out reply. Opt In must be checked for this checkbox option to be displayed.

If neither box is checked, the message will be sent to everyone that hasn't opted out via reply to an SMS message or by unchecking Allow SMS on their profile.



Tips:

The Opt-out table lists the mobile numbers in the DB; this is the Relay Unify blacklist. The blacklist for Message Media is created by a reply of STOP, ALTO, CANCEL, END, QUIT, UNSUB or UNSUBSCRIBE.

Allow SMS will have a value of 'Y' if the user physically clicked it on their profile.

Allow SMS will have a value of 'N' if the user checked SMS on their profile, saved, then unchecked it; or edited the profile for something else and clicked save.

Allow SMS will have a value of 'NULL' if it is a new user (default setting) regardless of self-registration or an admin creating the user; Users that haven't saved their profile settings or edited them.

The character limit on SMS messages is 1000 characters.

Mobile # - The mobile phone number to send the message. If this is coming from the web, the mobile number will be used, not the phone number field.

Date Key – The date that keys the sending of the text message. If the time is in the future, the messages will not be sent until that time. If the time is in the past (default is current time of creating the template initially) then the messages will be keyed when the submission runs and all criteria in the template are met. This should be a Date field if using a field from the data.

Send Type – Select an option. If an option other than Immediate is selected, the Days/Hours before or after and the Send Time can be static or can be determined from the data. The Send Time will need to be on the format hh:mm:ss if coming from the data. Send Days/Hours Before must be numeric fields.

Immediate – send the messages immediately.

Days Before – use the **Send Days Before** field to send the messages X days before the Date Key at the **Send Time**.

Hours Before – use the **Send Hours Before** field to send the messages X hours before the Date Key.

Days After – use the **Send Days After** field to send the messages X days after the Date Key at the **Send Time**.

Hours After – use the **Send Hours After** field to send the messages X hours after the Date Key.

Don't Send Between – The Start and End times to hold the messages. Any messages that would fall during these times will be moved to the first minute outside the range.

Send Responses To – Email address of the person to receive responses tagged as immediate that are keywords. An event must be set up for the email to be created.

Use Time Zone – Select a time zone.

NONE – This uses the Data Key with no offset for time zone.

Standard – This uses the default time zone of the global settings. If client level settings are used, those will override the global settings for this client.

Alternate – This uses the time zone selected from the dropdown field. If this is set for PST for example, and the Date Key is 1:00 PM CST, the message will be sent at 11:00 AM PST.

System Field – This uses a system field for the time zone. Enter a valid time zone abbreviation.

Mapped Field – This uses a mapped field for the time zone. The field value must be a valid time zone abbreviation.



Tips:

Time should be in military time format.

Always Send – Check to always send the email, even if a Cancel, Confirm or Reschedule response is received. By default, this setting is unchecked.

Send ONLY on – If Always Send is unchecked, the user can select to only send on certain responses, such as Confirm. The email will only be sent to those that reply Confirm, Cancel, or Reschedule (based on what is selected) to a different HTML Email Event.

Send immediate response email event to

Static

Email Address
support@pb.com

☒ Always send even if no response from previous message

EVENTS

EVENTS AVAILABLE

Confirm

Continue

No

Opt Out

ADD EVENT →

← REMOVE EVENT

Keywords

Click on the Keywords button to add keywords for this event.

Keyword – The keyword that the email recipient will enter, causing an event to occur. This will populate when the meaning is selected. The keywords and meanings were previously set up within the global settings.

Meaning – Select the meaning of the keyword. Some meanings will cause secondary events.

Send Response – This is how the responses to this keyword will be sent. If Immediate, an email will be sent immediately to the person set up for reply emails. If Batch, the response will only be included in the end of day batch report.

Send Reply SMS – If this is checked, a reply message will be sent immediately to the mobile phone.

Reply Message – The reply message that will be sent. This does not confirm the action of the keyword has been completed; this is confirmation that the response of the keyword was received.

Keywords Management

Keyword
C

Meaning
Confirm

How to send response email when reply received
Immediate

☐ Send Reply SMS

Reply Message

SELECT TAG TO INSERT

#CUSTID#	#SYS_ADDR1#
#CUSTNAME#	#SYS_ADDR2#
#ORGFILENAME#	#SYS_ADDR3#
#SUBID#	#SYS_ADDR4#
#SUBNAME#	#SYS_BALANCE#
#SYS_ACCT_ID#	#SYS_CITY#

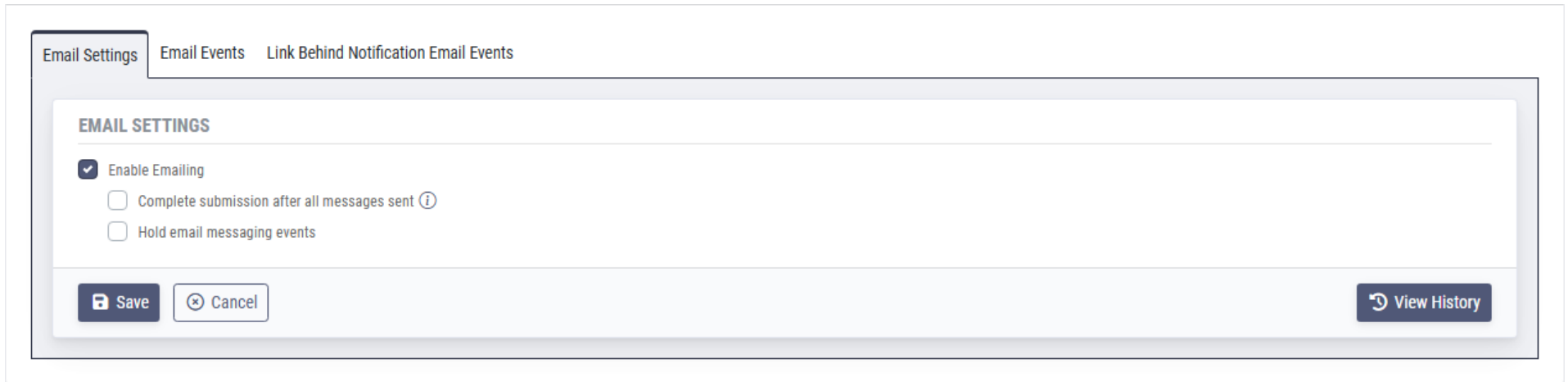
Submission Type Events

Within a submission type, the Messaging tab is where all Relay Unify uDeliver events are managed.

HTML Email Events

Within the messaging tab of a submission type, click on the Email tab to set up HTML Relay Unify uDeliver Email Events.

Enable Emailing – If this is checked, Relay Unify uDeliver Email Events that are enabled will be created. If this is unchecked, all events will be stopped, including enabled events.



The screenshot shows a configuration panel for 'Email Settings'. At the top, there are three tabs: 'Email Settings' (which is active and highlighted with a dark border), 'Email Events', and 'Link Behind Notification Email Events'. Below the tabs, the 'EMAIL SETTINGS' section contains three options: 'Enable Emailing' (checked with a dark square), 'Complete submission after all messages sent' (unchecked with a light square and an information icon), and 'Hold email messaging events' (unchecked with a light square). At the bottom left, there are 'Save' and 'Cancel' buttons. At the bottom right, there is a 'View History' button with a circular arrow icon.

To create an event or load and edit a template, click on **+ Add Email Event**.

Load from Template – Select a previously created template and click the load button next to the dropdown. The template can then be edited as needed for this submission type.

Event Description – Enter a description of the event.

Enabled – Check to enable the event.

Email Settings

Email Events

Link Behind Notification Email Events

EMAIL EVENTS

CONFIRM APPOINTMENT

ATTACHMENTS | SEND TEST EMAIL | MANAGE LINK BEHINDS

Select Template

LOAD FROM TEMPLATE

☒ Enabled

☒ Enable Tracking

Event Description

Confirm Appointment

Subject Line

Static

Subject

#CUSTNAME#,
Please confirm your appointment with PB.

CLICK TAG TO INSERT

#CUSTID#	#SYS_ADDR1#
#CUSTNAME#	#SYS_ADDR2#
#ORFILENAME#	#SYS_ADDR3#
#SUBID#	#SYS_ADDR4#
#SUBNAME#	#SYS_BALANCE#
#SYS_ACCT_ID#	#SYS_CITY#

Body

Static

Html Type

Custom

</> EDITOR

Email Recipient

System Field

System Field

Sys_MiscText1

SEND TIME

Date Key

Static

Date

01/01/2025

Time

12:00:00 PM

Use Time Zone

Alternate

System Field

Eastern Standard Time (North America)

Send

Immediate

Subject Line – Enter the subject of the email. If using a Static message, tags can be selected from the Tags **Subject Variables** area and added by clicking on the Add button once the template is loaded into a submission type. Since the tags are submission level specific, none will be listed on the template.

Most fields have 3 different places to pull the data from.

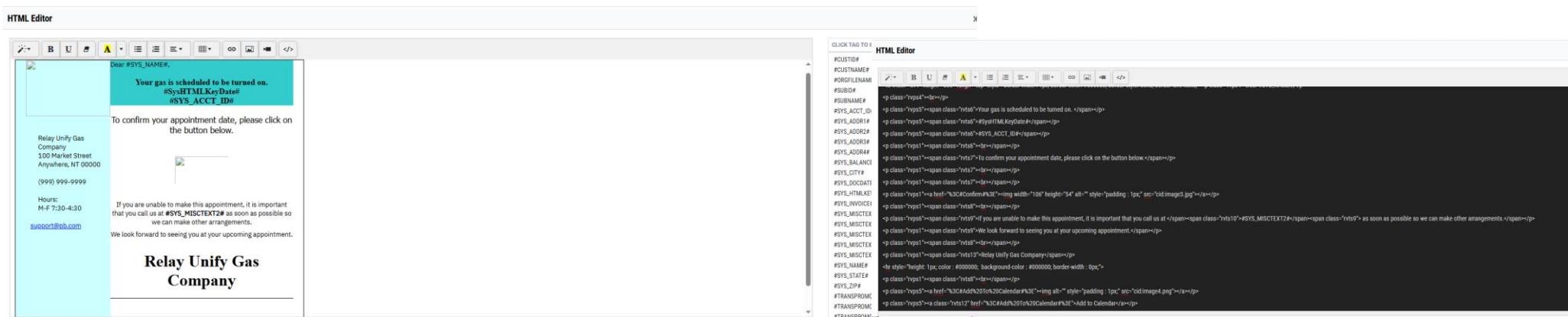
1. Static – The data will be entered in the static field.
2. System Field – The data will be pulled from a system field on the map. The system field must be selected.
3. Mapped Field – The data will be pulled from a user field that is saved to the database in the map. The field name entered must be the same as the field name on the map.

Body – Select if the body of the email will be Static or from DocHTMLEmail. If Static is selected, then the HTML Type can be selected. If DocHTMLEmail is selected, the body for each DocID will need to be entered in the DB table using a process such as a Relay Unify Bridge job.

HTML Type – If Relay Unify, then the HTML Editor will be used. If custom, then a standard editor can be used. Click on the **Editor** button to open the editor screen.

Relay Unify Editor

Custom Editor



Enable Tracking – Check this box to turn on email tracking. This will put a tracking image into the email. When the recipient opens their email, the image will be downloaded and the email record in the database will be marked as opened. This is for use with Mandrill only.

Email Address – The email address to send the emails. If Sys_EmailAddress or another mapped field is being pulled from the data, that email will override the web email.

Date Key – The date that keys the sending of the email. If the time is in the future, the emails will not be sent until that time. If the time is in the past (default is current time of creating the template initially) then the emails will be keyed when the submission runs and all criteria in the template are met. This should be a Date field if using a field from the data.

Send Type – Select an option. If an option other than Immediate is selected, the Days/Hours before or after and the Send Time can be static or can be determined from the data. The Send Time will need to be on the format hh:mm:ss if coming from the data. Send Days/Hours Before must be numeric fields.

Immediate – send the messages immediately.

Days Before – use the **Send Days Before** field to send the messages X days before the Date Key at the **Send Time**.

Hours Before – use the **Send Hours Before** field to send the messages X hours before the Date Key.

Days After – use the **Send Days After** field to send the messages X days after the Date Key at the **Send Time**.

Hours After – use the **Send Hours After** field to send the messages X hours after the Date Key.

Email Replies To – Email address of the person to receive responses tagged as immediate that are link behinds. An event must be set up for the email to be created.

Use Time Zone – Select a time zone.

NONE – This uses the Data Key with no offset for time zone.

Standard – This uses the default time zone of the global settings. If client level settings are used, those will override the global settings for this client.

Alternate – This uses the time zone entered in the field. If this is set for PST for example, and the Date Key is 1:00 PM CST, the message will be sent at 11:00 AM PST.

System Field – This uses a system field for the time zone. Enter a valid time zone abbreviation.

Mapped Field – This uses a mapped field for the time zone. The field value must be a valid time zone abbreviation.

Always Send – Check to always send the email, even if a Cancel, Confirm or Reschedule response is received. By default, this setting is unchecked.

Send ONLY on – If Always Send is unchecked, the user can select to only send on certain responses, such as Confirm. The email will only be sent to those that reply Confirm, Cancel, or Reschedule (based on what is selected) to a different HTML Email Event.



Tips:

Save to DB fields are available and listed in the editor. This requires an initial job be run so the fields become available. Save To DB fields will show as **#*fieldname#** in the list. The fields can be added to the subject or body of the email.



Tips:

Time should be in military time format.

Send immediate response email event to
Static

Email Address
support@pb.com

☒ Always send even if no response from previous message

EVENTS

EVENTS AVAILABLE

- Cancel
- Confirm
- Opt Out
- Yes

ADD EVENT →

← REMOVE EVENT

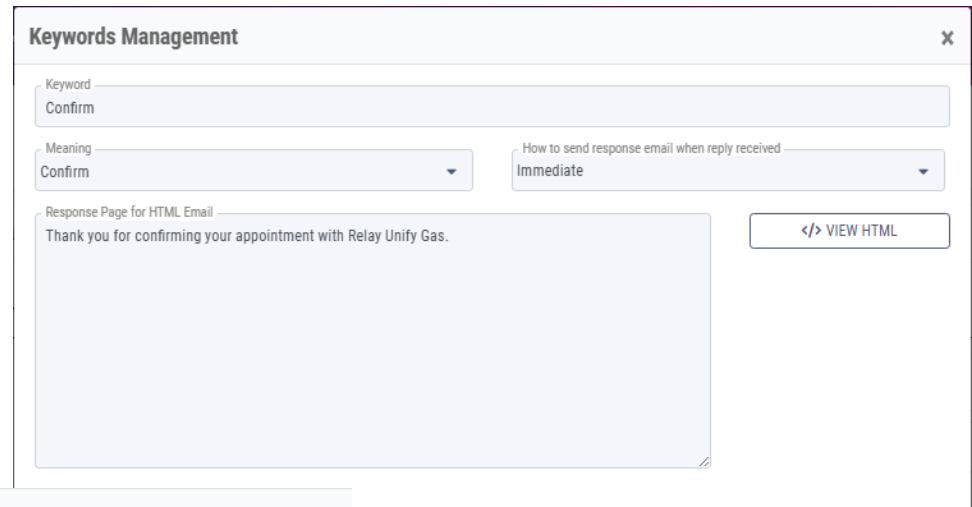
Link Behinds

Click on the Link Behinds button to add keywords for this event.

Keyword – The keyword that the email recipient will enter, causing an event to occur. This will populate when the meaning is selected. The keywords and meanings were previously set up within the global settings.

Meaning – Select the meaning of the keyword. Some meanings will cause secondary events.

Send Response email when reply received – This is how the responses to this keyword will be sent. If Immediate, an email will be sent immediately to the person set up for reply emails. If Batch, the response will only be included in the end of day batch report.



The **Keywords Management** dialog box contains the following fields and controls:

- Keyword:** A text input field with the value "Confirm".
- Meaning:** A dropdown menu with "Confirm" selected.
- How to send response email when reply received:** A dropdown menu with "Immediate" selected.
- Response Page for HTML Email:** A large text area containing the text "Thank you for confirming your appointment with Relay Unify Gas." To the right of this area is a button labeled "</> VIEW HTML".

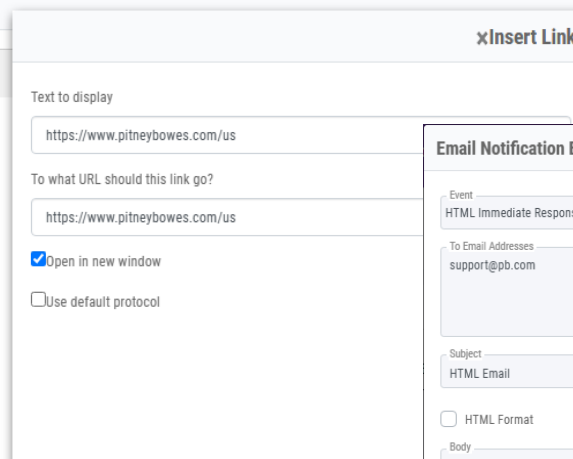
HTML Editor



Thank you #CUSTNAME# for your interest in Relay Unify.

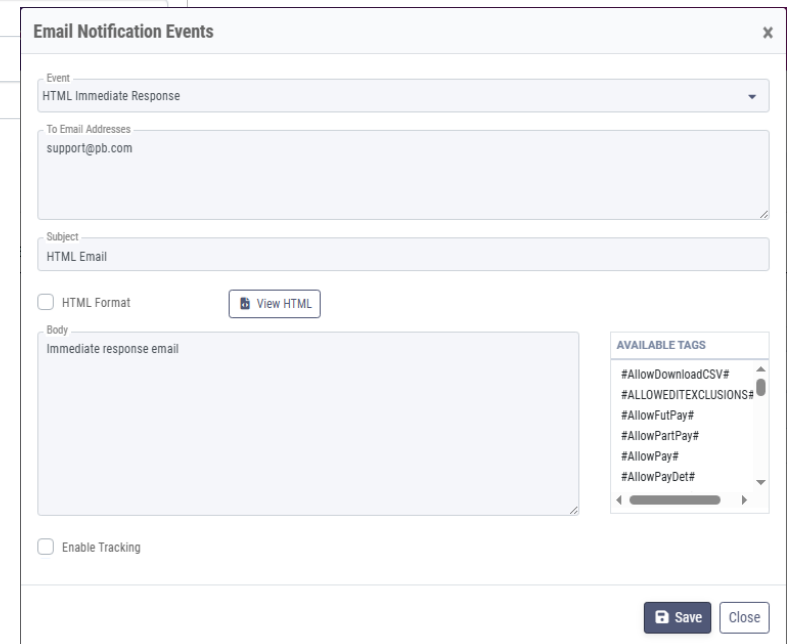
For more information please visit <https://www.pitneybowes.com/us> for more information and help.

Have a nice day!



The **xInsert Link** dialog box contains the following fields and controls:

- Text to display:** A text input field with the value "https://www.pitneybowes.com/us".
- To what URL should this link go?** A text input field with the value "https://www.pitneybowes.com/us".
- ☒ **Open in new window**
- ☐ **Use default protocol**



The **Email Notification Events** dialog box contains the following fields and controls:

- Event:** A dropdown menu with "HTML Immediate Response" selected.
- To Email Addresses:** A text input field with the value "support@pb.com".
- Subject:** A text input field with the value "HTML Email".
- ☐ **HTML Format** (with a **View HTML** button next to it)
- Body:** A text area with the value "Immediate response email".
- ☐ **Enable Tracking**
- AVAILABLE TAGS:** A list of tags including #AllowDownloadCSV#, #ALLOWEDITEXCLUSIONS#, #AllowFutPay#, #AllowPartPay#, #AllowPay#, and #AllowPayDet#.
- Buttons:** **Save** and **Close** buttons at the bottom right.

To add Link Behinds in the editor, select an image or text and click on the Hyperlink button under Advanced or right-click on the image or text and select Hyperlink. Select a Predefined Meaning from the dropdown list. The target will automatically be set as a tag that will be filled in when the email is created.

Click on the **Response Page for HTML Email** to edit the response page.

Attachments

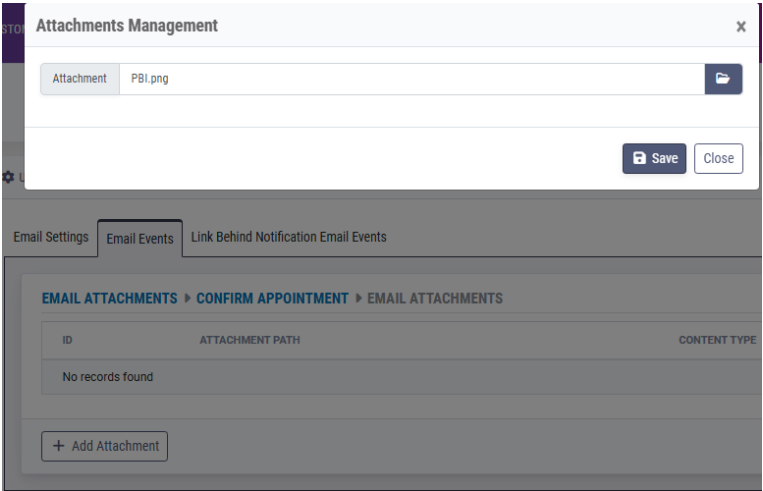
An attachment can be added to the email by clicking on the Attachments button in the Email Event setup.

Click New and then select a document to attach to the email event. It is recommended this is a full UNC path to the document and that PDFEmail has access to the location of the document.

Each email sent by this event will include this document, so it shouldn't contain user specific information.

The document size should be under 10MB, which is the standard size limit for an email.

Click Save.



Send Test Email

Once the event is created, click on the Send Test Email button to see a sample of the email.

Enter the email address and field values that will be used to send and populate the email.

Click on the Send Test Email button to send the sample email for the event.

Send Test Email

Email Address

#SYS_ACCT_ID#

#SYS_NAME#

#SYS_MISCTEXT2#

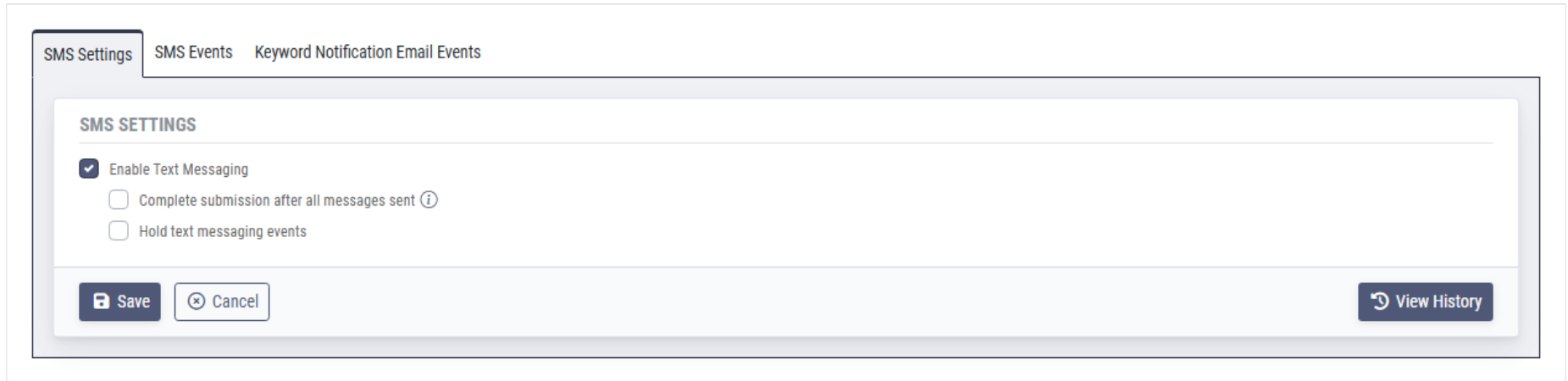
Send Test Email

Close

SMS Events

Within the messaging tab of a submission type, click on the Text tab to set up Relay Unify uDeliver SMS Events.

Enable Text Messaging – If this is checked, Text Messaging Events that are enabled will be created. If this is unchecked, all events will be stopped, including enabled events.



The screenshot shows a modal dialog box titled "SMS SETTINGS". At the top, there are three tabs: "SMS Settings" (selected), "SMS Events", and "Keyword Notification Email Events". The "SMS SETTINGS" tab contains the following options:

- ☒ **Enable Text Messaging**
- ☐ Complete submission after all messages sent ⓘ
- ☐ Hold text messaging events

At the bottom left, there are two buttons: "Save" and "Cancel". At the bottom right, there is a "View History" button with a circular arrow icon.

To create an event or load and edit a template, click on **+ Add SMS Event**.

Load from Template – Select a previously created template and click the load button next to the dropdown. The template can then be edited as needed for this submission type.

Event Description – Enter a description of the event.

Enabled – Check to enable the event.

Text Message – The text message data. If using a Static message, tags can be selected from the Tags area and added by clicking on the **Add** button.

Most fields have 3 different places to pull the data from.

1. Static – The data will be entered in the static field on the template.
2. System Field – The data will be pulled from a system field on the map. The system field must be selected.

3. Mapped Field – The data will be pulled from a user field that is saved to the database in the map. The field name entered must be the same as the field name on the map.



Tips:

The Opt-out table lists the mobile numbers in the DB; this is the Relay Unify blacklist. The blacklist for Message Media is created by a reply of STOP, ALTO, CANCEL, END, QUIT, UNSUB or UNSUBSCRIBE.

Allow SMS will have a value of 'Y' if the user physically clicked it on their profile.

Allow SMS will have a value of 'N' if the user checked SMS on their profile, saved, then unchecked it; or edited the profile for something else and clicked save.

Allow SMS will have a value of 'NULL' if it is a new user (default setting) regardless of self-registration or an admin creating the user; Users that haven't saved their profile settings or edited them.

The character limit on SMS messages is 1000 characters.

SMS Settings | **SMS Events** | Keyword Notification Email Events

SMS EVENTS ▶ CONFIRM YOUR APPT TEST SMS MESSAGE | MANAGE KEYWORDS

Select Template LOAD FROM TEMPLATE

☒ Enabled ☒ Opt In ☐ Non-Optins ONLY

Event Description
Confirm Your Appointment

Text Message
Static

Message
Dear #Sys_Name#,
Please confirm your appointment for account number #Sys_Acct_ID#, and head to our website at:
https://www.pitneybowes.com/us
Please login to view your appointment information,
Thank you.

CLICK TAG TO INSERT

#CUSTID#	#SYS_ADDR1#
#CUSTNAME#	#SYS_ADDR2#
#ORGFILNAME#	#SYS_ADDR3#
#SUBID#	#SYS_ADDR4#
#SUBNAME#	#SYS_BALANCE#
#SYS_ACCT_ID#	#SYS_CITY#

Mobile #
From Web

SEND TIME

Date Key: Static Date: 01/01/2025 Time: 12:00:00 PM

Use Time Zone: Alternate System Field: Eastern Standard Time (North America)

Send: Immediate

SEND EXCLUSION TIMES

DO NOT SEND BETWEEN (maybe with details)

Static 08:00 PM AND Static 08:00 AM

Opt In – If this is checked, the message will be sent to everyone regardless of Allow SMS being checked on the web user profile. An opt-in and opt-out keyword will need to be set up.

Non-Optins ONLY – If this is checked, it will be sent to web users that don't have allow SMS checked yet and those that haven't sent an opt-out reply. Opt In must be checked for this checkbox option to be displayed.

If neither box is checked, the message will be sent to everyone that hasn't opted out via reply to an SMS message or by unchecking Allow SMS on their profile.

Mobile # - The mobile phone number to send the message. If this is coming from the web, the mobile number will be used, not the phone number field.

Date Key – The date that keys the sending of the text message. If the time is in the future, the messages will not be sent until that time. If the time is in the past (default is current time of creating the template initially) then the messages will be keyed when the submission runs and all criteria in the template are met. This should be a Date field if using a field from the data.

Send Type – Select an option. If an option other than Immediate is selected, the Days/Hours before or after and the Send Time can be static or can be determined from the data. The Send Time will need to be on the format hh:mm:ss if coming from the data. Send Days/Hours Before must be numeric fields.

Immediate – send the messages immediately.

Days Before – use the **Send Days Before** field to send the messages X days before the Date Key at the **Send Time**.

Hours Before – use the **Send Hours Before** field to send the messages X hours before the Date Key.

Days After – use the **Send Days After** field to send the messages X days after the Date Key at the **Send Time**.

Hours After – use the **Send Hours After** field to send the messages X hours after the Date Key.

Don't Send Between – The Start and End times to hold the messages. Any messages that would fall during these times will be moved to the first minute outside the range.

Email Responses To – Email address of the person to receive responses tagged as immediate that are keywords. An event must be set up for the email to be created.

Use Time Zone – Select a time zone.

NONE – This uses the Data Key with no offset for time zone.

Standard – This uses the default time zone of the global settings. If client level settings are used, those will override the global settings for this client.

Alternate – This uses the time zone selected from the dropdown field. If this is set for PST for example, and the Date Key is 1:00 PM CST, the message will be sent at 11:00 AM PST.

System Field – This uses a system field for the time zone. Enter a valid time zone abbreviation.

Mapped Field – This uses a mapped field for the time zone. The field value must be a valid time zone abbreviation.



Tips:

Time should be in military time format.

Always Send – Check to always send the email, even if a Cancel, Confirm or Reschedule response is received. By default, this setting is unchecked.

Send ONLY on – If Always Send is unchecked, the user can select to only send on certain responses, such as Confirm. The email will only be sent to those that reply Confirm, Cancel, or Reschedule (based on what is selected) to a different HTML Email Event.

Send immediate response email event to
Static

Email Address
support@pb.com

☒ Always send even if no response from previous message

EVENTS

EVENTS AVAILABLE

Cancel
Confirm
Continue
No

ADD EVENT →

← REMOVE EVENT

Keywords

Click on the Keywords button to add keywords for this event.

Keyword – The keyword that the email recipient will enter, causing an event to occur. This will populate when the meaning is selected. The keywords and meanings were previously set up within the global settings.

Meaning – Select the meaning of the keyword. Some meanings will cause secondary events.

Send Response – This is how the responses to this keyword will be sent. If Immediate, an email will be sent immediately to the person set up for reply emails. If Batch, the response will only be included in the end of day batch report.

Send Reply SMS – If this is checked, a reply message will be sent immediately to the mobile phone.

Reply Message – The reply message that will be sent. This does not confirm the action of the keyword has been completed; this is confirmation that the response of the keyword was received.

Keywords Management

Keyword
C

Meaning
Confirm

How to send response email when reply received
Immediate

☐ Send Reply SMS

Reply Message
Looking forward to seeing you #Sys_SMSKeyDate#!

SELECT TAG TO INSERT

#CUSTID#	#SYS_ADDR1#
#CUSTNAME#	#SYS_ADDR2#
#ORGFILNAME#	#SYS_ADDR3#
#SUBID#	#SYS_ADDR4#
#SUBNAME#	#SYS_BALANCE#
#SYS_ACCT_ID#	#SYS_CITY#

Send Test Text Message

Once the event is created, click on the Send Test Message button to see a sample of the text message.

Enter the mobile number and field values that will be used to send and populate the text message. The fields in red are the ones used in the event and need a sample value.

Click on the Send Test Message button to send the sample SMS for the event.

Send Test Message

Mobile Phone #

#SYS_ACCT_ID#

#SYS_NAME#

Send Test Message

Close

Running Submissions

Records in uSetup

The events and individual messages can be tracked for a submission type within uSetup. In the submission, go to the Job Tracking Dropdown tab > Submissions tab on the left-hand side. Then click on the submission to see the submission details. Go to the Submission Transaction Detail, choose from the dropdown to see all of the details.

The events are found under the Text Events, and Relay Unify uDeliver Email Events tabs.

The individual emails and messages are listed under the Messages (directly underneath Text Events for SMS Messages), Relay Unify uDeliver Email Events, and Messages.

MANAGE JOB TRACKING

5115 Pitney Bowes34218 PB_Gas

SUBMISSIONS

SUBMISSION 15534

SUBMISSION DETAILS

SUBMISSION ID:15534

STATUS:Ready to Print

TYPE:FTP

CUSTOMER:Pitney Bowes

MAP:Tyler Demo\pb training.nmp

EXPIRES:N

EXPIRATION DATE:

FILE INFORMATION

DATE RECEIVED:3/7/2025 3:51:34 PM

RECEIVED VIA:FTP

FILE NAME:20250307153837260PB_Gas

ORIG FILE NAME:Normal_1_of_1.pdf

MD5 SUM:6F06EF383FD7A2DCDE63B2BA0410216B

TOTAL DOCS:32

TOTAL PAGES:32

JOB & PRINT INFORMATION

JOB STATUS:Ready to Print

PS JOB ID:10066

FORM:Standard 24 lb paper blank

WEB APPROVAL

APPROVED:

DATE APPROVED:

APPROVED BY:

APPROVAL REASON:

SUBMISSION TRANSACTION DETAIL

Select Details

Transactions

Transactions

Email Events

Emails

Exclusions

Text Events

Text Messages

uDeliver Email Events

uDeliver Emails

uSecure

Voice Events

Voice Messages

Records in uControl

On the View Submisisions tab in uControl, right click on a submission to see the details, then choose the View Detail option.

The Text Events Dropdown shows a list of the SMS messages that were generated as part of Relay Unify uDeliver.

SUBMISSION TRANSACTION DETAIL						
Select Details Text Events						
TEXT EVENTS						
ID	CREATED	STATUS	PROCESSED	MESSAGE	MOBILE #	DATE KEY
3426	3/7/2025 3:52:00 PM	Complete	3/7/2025 3:53:00 PM	Your appt is scheduled for #Sys_SMSKeyDate#. Press c to confirm and R to reschedule.	From Web	May 13 2019 7:12PM
3427	3/7/2025 3:52:00 PM	Complete	3/7/2025 3:53:00 PM	Thank you for confirming your appointment.	From Web	Jul 9 2018 4:12PM
3428	3/7/2025 3:52:00 PM	Complete	3/7/2025 3:53:00 PM	testing the send time	From Web	DATE KEY

The Relay Unify uDeliver Email Events tab shows a listing of the Emails that were generated as part of Relay Unify uDeliver.

SUBMISSION TRANSACTION DETAIL						
Select Details uDeliver Email Events						
UDELIVER EMAIL EVENTS						
ID	CREATED	STATUS	PROCESSED	SUBJECT	EMAIL ADDRESS	DATE KEY
1973	3/7/2025 3:52:00 PM	Complete	3/7/2025 3:53:02 PM	Please confirm your appointment	FROM Web	Jun 7 2018 1:28PM
1974	3/7/2025 3:52:00 PM	Complete	3/7/2025 3:53:02 PM	Body from DocHTMLEmail	FROM Web	Jun 7 2018 1:28PM
1975	3/7/2025 3:52:00 PM	Complete	3/7/2025 3:53:02 PM	date and time test	FROM Web	DATE KEY
1976	3/7/2025 3:52:00 PM	Complete	3/7/2025 3:53:02 PM	test3	FROM Web	Dec 10 2018 12:12PM
1977	3/7/2025 3:52:00 PM	Complete	3/7/2025 3:53:02 PM	Please confirm your appointment	FROM Web	Jun 7 2018 1:28PM
1978	3/7/2025 3:52:00 PM	Complete	3/7/2025 3:53:02 PM	Save to Db field 1024 char test in body	FROM Web	May 21 2020 10:26AM

Messages Only

This option is on both types of Relay Unify uDeliver events.

Close submission after all messages sent – Submission will go to HTML ONLY (for Relay Unify uDeliver Email Events) or MESSAGES ONLY (for SMS Events) status from BreakPack and then will go to complete once all emails/messages have been sent or cancelled. If the submission type is set up for web approval, cleansing, etc. it will pass through those statuses and then skip to MESSAGES ONLY status.



Tips:

If a submission type is setup to create only messages/emails such as appointment reminders and a document is not generated, it is recommended to use this feature. This should be checked for all or none of the types of Relay Unify Deliver events created for the submission type; it should not be checked for Relay Unify uDeliver emails but not checked for SMS messages.

Email Settings | Email Events | Link Behind Notification Email Events

EMAIL SETTINGS

- ☒ Enable Emailing
- ☐ Complete submission after all messages sent ⓘ
- ☐ Hold email messaging events

[Save](#) [Cancel](#) [View History](#)

SMS Settings | SMS Events | Keyword Notification Email Events

SMS SETTINGS

- ☒ Enable Text Messaging
- ☐ Complete submission after all messages sent ⓘ
- ☐ Hold text messaging events

[Save](#) [Cancel](#) [View History](#)

Hold Email Events

This option is on both types of Relay Unify uDeliver events.

Hold Email/Text Messaging Events – If this is checked, all Relay Unify uDeliver Email Events, or Text Message Events will be put on hold. They can be queued at a later point to generate the emails/messages.



Tips:

The events are created by the following SQL Server Agent Jobs:

Relay Unify RunHTMLEvents

Relay Unify RunSMSEvents

The emails/messages are then sent by the 3rd party or service responsible for sending them.

The screenshot shows the 'Email Settings' window with tabs for 'Email Settings', 'Email Events', and 'Link Behind Notification Email Events'. The 'EMAIL SETTINGS' section contains three checkboxes: 'Enable Emailing' (checked), 'Complete submission after all messages sent' (unchecked), and 'Hold email messaging events' (checked). At the bottom, there are 'Save' and 'Cancel' buttons on the left, and a 'View History' button on the right.

The screenshot shows the 'SMS Settings' window with tabs for 'SMS Settings', 'SMS Events', and 'Keyword Notification Email Events'. The 'SMS SETTINGS' section contains three checkboxes: 'Enable Text Messaging' (checked), 'Complete submission after all messages sent' (unchecked), and 'Hold text messaging events' (checked). At the bottom, there are 'Save' and 'Cancel' buttons on the left, and a 'View History' button on the right.

The individual emails/messages generated will then be listed under the Messages (directly to the right of Text Events for SMS Messages), HTML Emails, and Messages (directly to the right of Text Events for Messages). They can also be found in uControl within the transaction details for a submission.

Reporting

Multi-Channel Delivery Report

This report can be generated from uSetup from the Global Settings menu on the dashboard.

This report can also be viewed on the web by admin users under the View and Print Reports option on the admin landing page.

The MultiChannel Delivery report can be generated for one submission type, one customer, or for all customers for a range of dates.

Enter the submission ID or the date range.

Enter the desired parameters and file name, then click Print to print the report or Save as Delimited to save the file to the location specified.

UDELIVER - REPORTS Global Settings

MULTI-CHANNEL DELIVERY REPORT

Report only shows submissions with Email and SMS

Customer

<ALL>

Submid

0

Start Date

01/01/2025

End Date

11/24/2025

DELIMITER

☒ , (comma) ☐ | (pipe) ☐ <tab> ☐ ; (semicolon) ☐ ~ (tilde)

Download as Delimited

Download PDF

Example:

Multi-Channel Delivery Report

×

↺

↻

1 / 1

↻

↻

⬇

⬇

⬇

⬇

⬇

×

↺

↻

1 / 1

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⬇

⬇

⬇

⬇

⬇

Multi-Channel Delivery Report

Account #/Name	Sub ID	PO #	Sub Type Name	Subm ID	# Text	# Email	# Phone	Call Duration						Trans
								<= 1:00	1:01-2:00	2:01-3:00	3:01-4:00	4:01-5:00	> 5:00	
Relay Unify Web4	PBW4_Ga		Relay Unify Web4 Gas	8081	3	0	0	0	0	0	0	0	0	0
Relay Unify Web4	PBW4_Ga		Relay Unify Web4 Gas	8117	3	0	0	0	0	0	0	0	0	0
Relay Unify Web4	PBW4_Ga		Relay Unify Web4 Gas	8198	6	0	0	0	0	0	0	0	0	0
Relay Unify Web4	PBW4_Ga		Relay Unify Web4 Gas	8199	6	0	0	0	0	0	0	0	0	0
Relay Unify Web4	PBW4_Ga		Relay Unify Web4 Gas	8200	6	6	0	0	0	0	0	0	0	0
Relay Unify Web4	RU_Healt		Relay Unify Healthcare Dem	8201	3	3	0	0	0	0	0	0	0	0
Relay Unify Web4	RU_Healt		Relay Unify Healthcare Dem	8202	3	3	0	0	0	0	0	0	0	0
Relay Unify Web4	RU_Healt		Relay Unify Healthcare Dem	8203	3	3	0	0	0	0	0	0	0	0
Relay Unify Web4	RU_Healt		Relay Unify Healthcare Dem	8204	3	3	0	0	0	0	0	0	0	0
Totals:					36	18	0	0	0	0	0	0	0	0

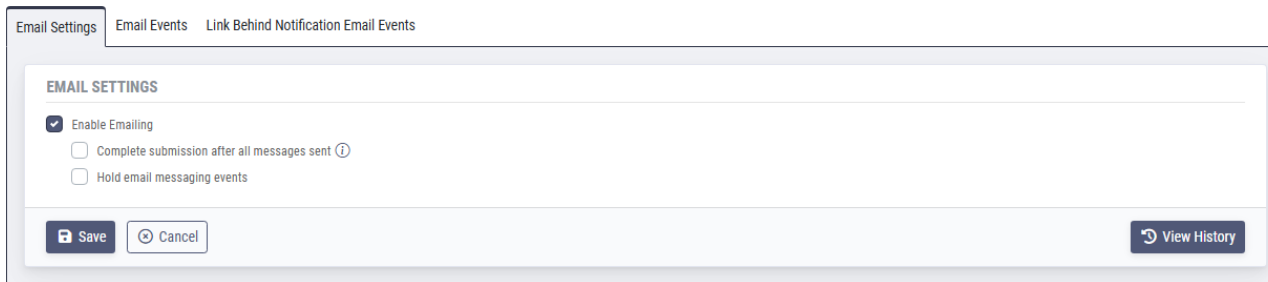
Close

Response Email Events

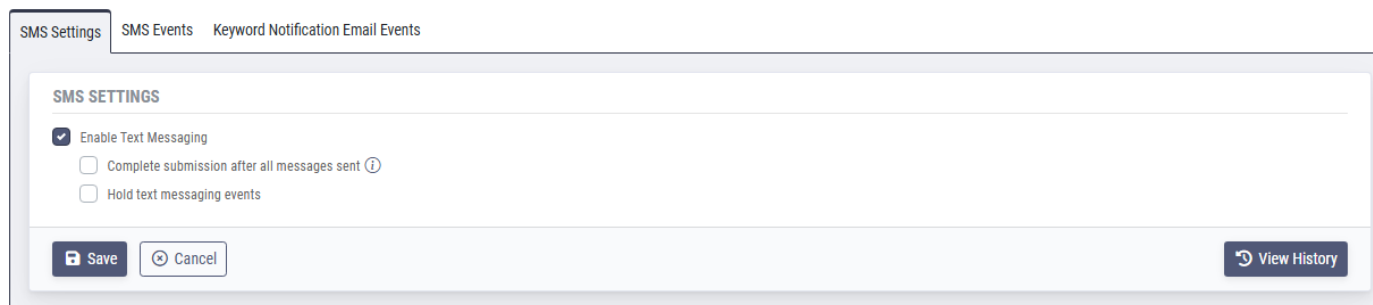
Users can reply with a keyword or click on a link containing a link behind in the HTML emails. These responses can be sent via email to someone immediately or as a batch daily at midnight. For high volume scenarios, batch is recommended.

To create this immediate or batch response email event, click on the **Setup Email/Text Email Events** button within the Relay Unify uDeliver Dropdown tab of the submission type.

The immediate, and batch response email events for each type of message will need to be created.



The screenshot shows the 'Email Settings' configuration panel. At the top, there are three tabs: 'Email Settings' (selected), 'Email Events', and 'Link Behind Notification Email Events'. The main content area is titled 'EMAIL SETTINGS' and contains three options: 'Enable Emailing' (checked), 'Complete submission after all messages sent' (unchecked), and 'Hold email messaging events' (unchecked). At the bottom left are 'Save' and 'Cancel' buttons, and at the bottom right is a 'View History' button.



The screenshot shows the 'SMS Settings' configuration panel. At the top, there are three tabs: 'SMS Settings' (selected), 'SMS Events', and 'Keyword Notification Email Events'. The main content area is titled 'SMS SETTINGS' and contains three options: 'Enable Text Messaging' (checked), 'Complete submission after all messages sent' (unchecked), and 'Hold text messaging events' (unchecked). At the bottom left are 'Save' and 'Cancel' buttons, and at the bottom right is a 'View History' button.

To create a new email event, click the **Setup Email/Text Email Events** button.

Click New.

Event – Select the type of email event you wish to create. The Immediate Response email will be sent immediately when someone clicks on a link behind or replies with a keyword. The Batch Response email will be sent once a day containing the previous day's responses. The batch email will have an attached file that will be a blank spreadsheet if there were no responses the previous day.

To Email Addresses – The email for the batch event can be entered here, semi-colon delimited for multiple emails addresses. For the immediate event, this field is grayed out; the email address will be pulled from the Email Replies To field on the event.

Subject – Enter the subject of the email. Tags can be added to the text entered here.

Body – Enter the body of the email. Tags can be added to the text entered here.

To embed a field tag into the text for the subject or the body of the email, select a tag from the list and click the **Add Tag** button. The tag will be inserted to where the cursor was before the tag was selected.

HTML – If the email is written in HTML, check this box. Use the **View HTML** button to preview the email.

Click Save.

The screenshot shows a web form titled "Email Notification Events" with a close button (X) in the top right corner. The form contains several sections: "Event" with a dropdown menu set to "SMS Immediate Response"; "To Email Addresses" with a text field containing "pb@pb.com"; "Subject" with a text field containing "SMS Immediate"; an "HTML Format" checkbox (unchecked) and a "View HTML" button; a "Body" section with a large text area containing placeholder text: "subm ID - #SUBMID#", "Account Number #SYS_ACCT_ID# has responded to your text message.", "The original message was: #SMS_MESSAGE#", and "Their response was #SMS_RESPONSE#."; an "AVAILABLE TAGS" sidebar on the right listing tags like #AllowDownloadCSV#, #ALLOWEDITEXCLUSIONS#, #AllowFutPay#, #AllowPartPay#, #AllowPay#, and #AllowPayDet#; and an "Enable Tracking" checkbox (unchecked) at the bottom. At the bottom right of the form are "Save" and "Close" buttons.

Relay Unify Glossary

Users:

- **Relay Unify User** – User created that has access to all of the Relay Unify programs on the Relay Unify database. This includes every module except for Relay Unify Print Manager.
- **Relay Unify Print Manager User** – A user that is created in Relay Unify Print Manager and only has access to log into Relay Unify Print Manager. This user is set up in addition to the Relay Unify user because Relay Unify Print Manager is on the Print Queue database and not the Relay Unify database
- **Web User** – A user from admin level to end user that has a login to the web portal.
- **User Type** – There are three user types by default: admin, CSR, and end/standard user. Additional user types can be created and customized. Each user type can have multiple users.

Inserts – This would be a physical “buck slip” that is inserted on the inserter.

Onserts - This would be an add-on attachment (i.e. PDF of some special notification or marketing piece) that is meant to be printed in-line with the document that now becomes part of the document.

CLID/Client/Customer – These terms are used interchangeably and refer to the client setup in uSetup. Each client can have multiple submission types under it. The CLID is the unique number given to each client.

Map – The document that is created using Relay Unify Compose, our composition tool.

Omit – Documents marked not to get printed (excluding e-statements).

Exclude – Documents that do not get presorted; can still be printed but not with the standard run.

No Mail – Documents that are printed but not mailed (ex: send to customer).

Presort – In bins for mailing.

Cleanse – Make sure addresses are correct and updates them.

Submission Type – This is where the business rules are set up for a document.

Submission – Every time a data file is submitted, and a submission type is processed it is called a single submission. A submission type can have a submission run every month for example.

Job – A job consists of one or more submissions.

Merge Job – Consists of two or more submissions. Documents from either submission are merged into one document (mail piece) based on certain criteria. This can be done by Name, Address, or Account Number.

Combine Job – Consists of two or more submissions. Generally multiple submissions of smaller size are combined to get through Presort at once to receive presort discounts. The number of documents from each submission remains the same during a combine job.

Print Job – Created using a print configuration or manually in uPrint. One job can generate multiple print jobs.

Print File – The file(s) created as part of the print job that is sent to the printer. One print job can have multiple print files created by size or number of documents for example.