Ship & Mail
Mailing Software

Relay Unify Web

User Guide

US English Edition
January 2026

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Introduction

Relay Unify’s simple and powerful branding tools can be implemented for any number of clients. With an unlimited number of pages available and full support for any CSS (Cascading Style Sheets), the branding is only limited by your design knowledge or your client's imagination. The branding flows through all pages from the initial upload, all the way through web presentment and bill pay to ensure every user has a complete and professional solution.

The CSS support makes changing the look and feel simple for anyone with basic HTML knowledge. This lets you offer basic branding for a nominal fee or use the API tool set to create a fully branded e-delivery site that has the same look and feel as a corporate site.

Relay Unify enables you to deliver communications across all media and fully customize the appearance of the delivery method without the need for expensive programming staff.

In today's world of instant gratification, you need to offer more services than just print and mail. Relay Unify enables you to expand your services to true secure multi-channel delivery. Relay Unify can support your workflow with:

- Secure web submission
- Web proofing
- Web delivery as HTML, image or PDF
- Email with login links or PDF attachments
- Support for single sign on
- Fully or partially branded websites

Relay Unify is a single web-based solution that includes secure branded customer facing self-service solution with capabilities that enable the full range of business and consumer customer service, and account management activities. The Relay Unify zero foot-print web-based solution provides a secure dashboard for customers to access search and retrieve information from a single, easy-to-use web interface.

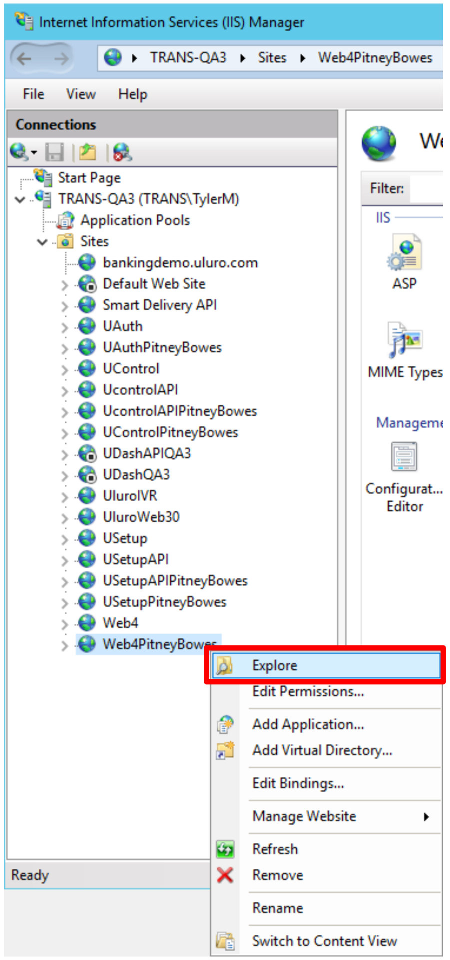
Implementation Summary

1. Set up and configure the site.
2. Customize the site for that client including text, images, or custom web pages.
3. Create users for the site.
4. Set up and customize self-registration.
5. Customize the web display column settings when searching for documents.

Setup and Initialize the Site

Web Image Directory

All images for the site, including the logos, will need to be placed in the image directory. If you do not know where that image directory is located, you can open IIS, right-click on Web4PitneyBowes and select Explore. This will automatically take you to your Web4 directory. The images folder is located in the Web4 directory. Web4 > wwwroot > exp-import > Images.



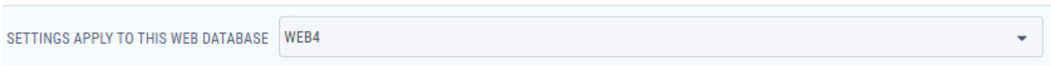
Tips:

We recommend creating a folder for each client/site within the images directory.

Web Setup

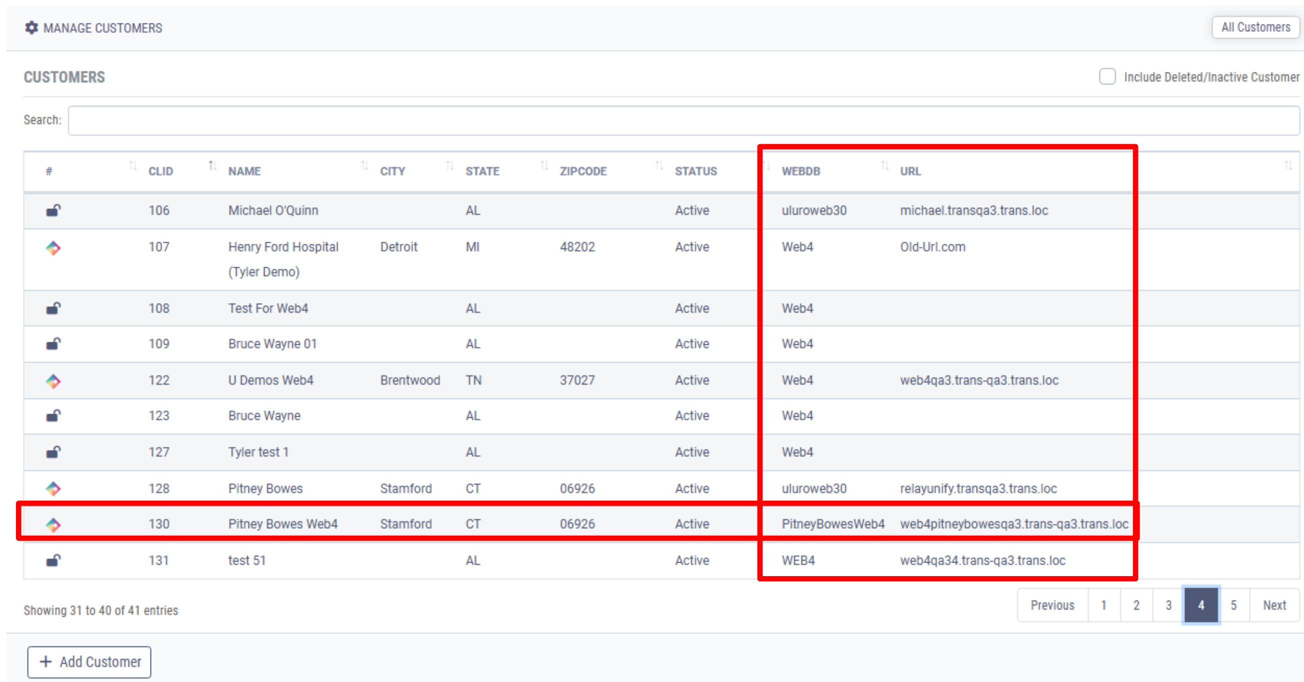
There is only one way to set a customer up for the web:

1. Click on the customer from the list on the Manage Customers Screen on Realy Unify Setup. Choose the Web4 tab on the left. It will give you a database dropdown with Web4.

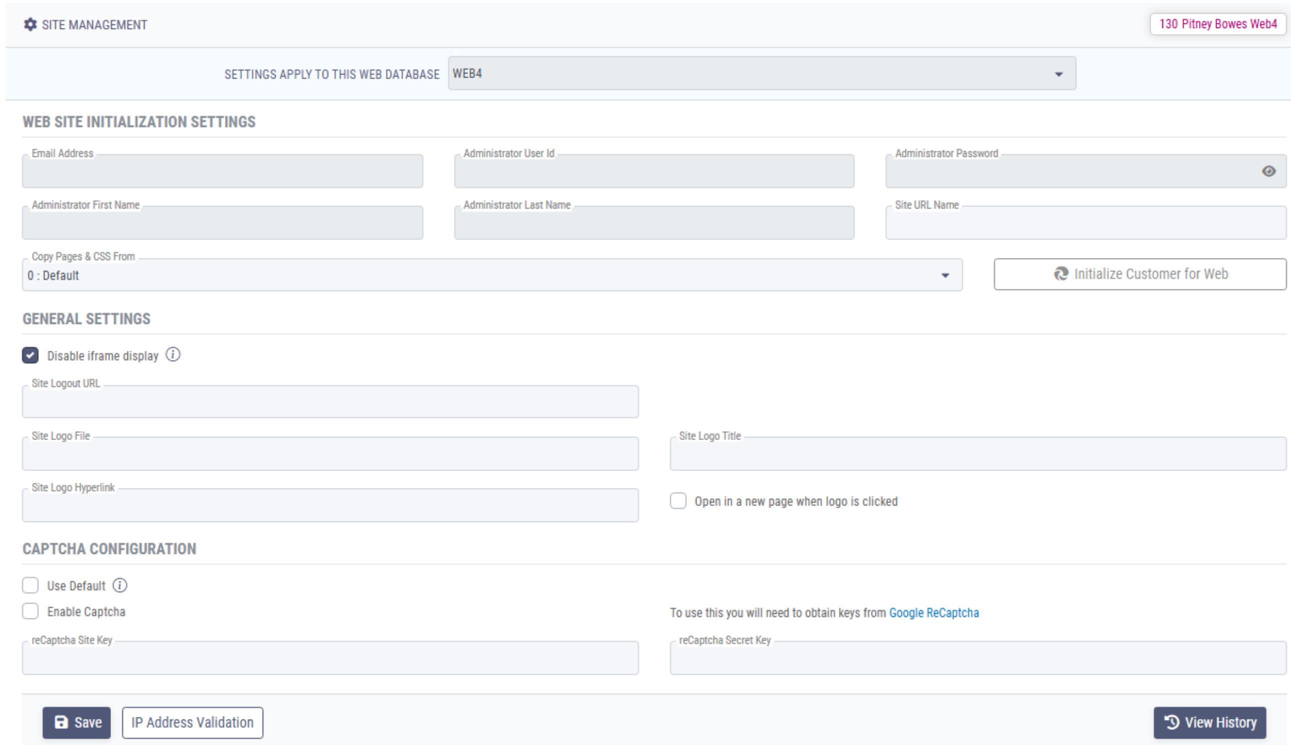


Tips:

You can tell if a customer has been setup for the web already by looking at the Web DB/URL columns in the customer list in uSetup. For example, the Pitney Bowes and Pitney Bowes Web4 have sites set up on the web.

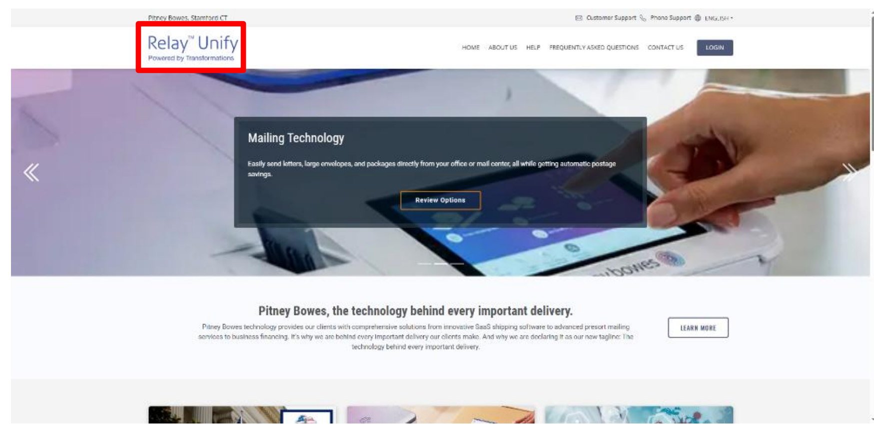


Once a database is selected, you can initialize the site. The bottom portion (General Settings) will only be visible after you save the site. You will not be able to come back and edit the web site initialization settings portion once the site is initialized.



Web Database – This reflects the database selected previously. It is grayed out and cannot be edited. After a site has been completely setup for one database including users, you cannot change the database.

Site URL Name – This typcially comes from your hosting service. You will need to set up your DNS to point to your web server and set up your URLs. It is common to purchase a general domain and create subdomains for each of your clients.

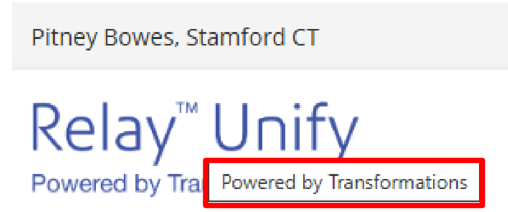


Disable iframe display – Check this box to keep iframe disabled. If you want to see Web4 in an iframe, uncheck the box, but it will cause a security vulnerability.

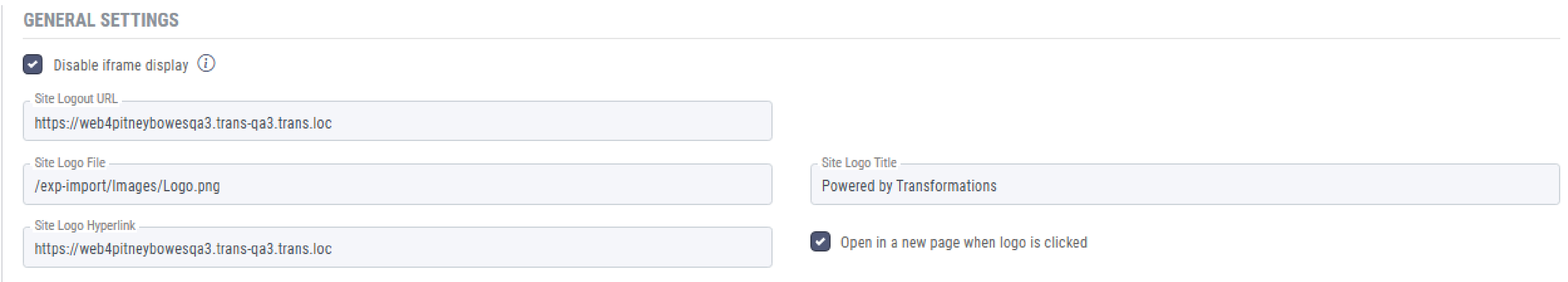
Site Logout URL – This will be the site that users will be directed to when they sign out/logout of the site. It must contain an http:// or https://.

Site Logo File – This is the image that will appear in the top left corner of the site. Enter the path to the logo after the images directory. The Web Logo file will by deafult use the relative path to the images directory.

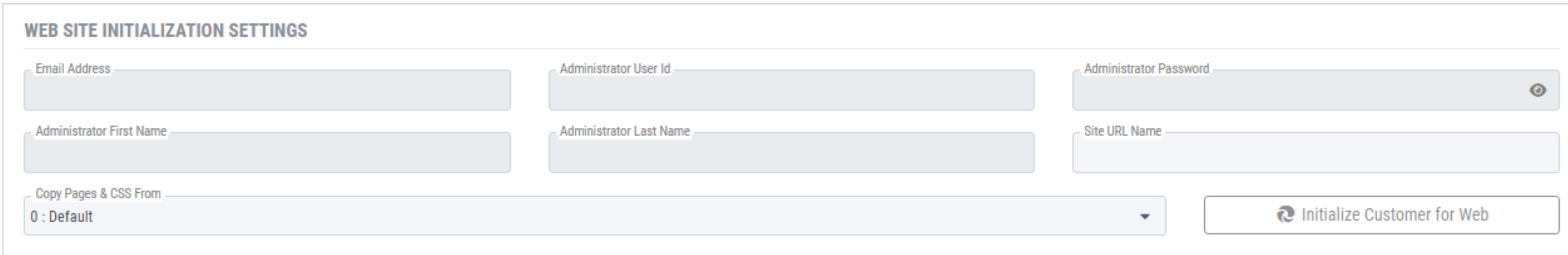
Site Logo Title: The text here will be displayed when a user hovers the mouse over the Web Logo File image on the site.



Site Logo Hyperlink – If a user clicks on the Web Logo File image, the user will be redirected to the site that is entered here. The site must have http:// or https://. If the **Open in a new page when clicked** checkbox is checked, the site will open in a new window/tab (based on the browser being used to view the site) and the current window/tab will stay on the Uuro Web URL site.



Now that this portion is complete, click SAVE.



Initialize the Site

The Web Site Initialzation Settings section at the top of the web setup is only editable the first time you create a site. Once it has been initialized and set up this tab will change and these settings will no longer be accessible.

Email Address – Enter the email address for the admin user. This should be a working email address that the admin user will have access to if an email is triggered later during the customization of the site.

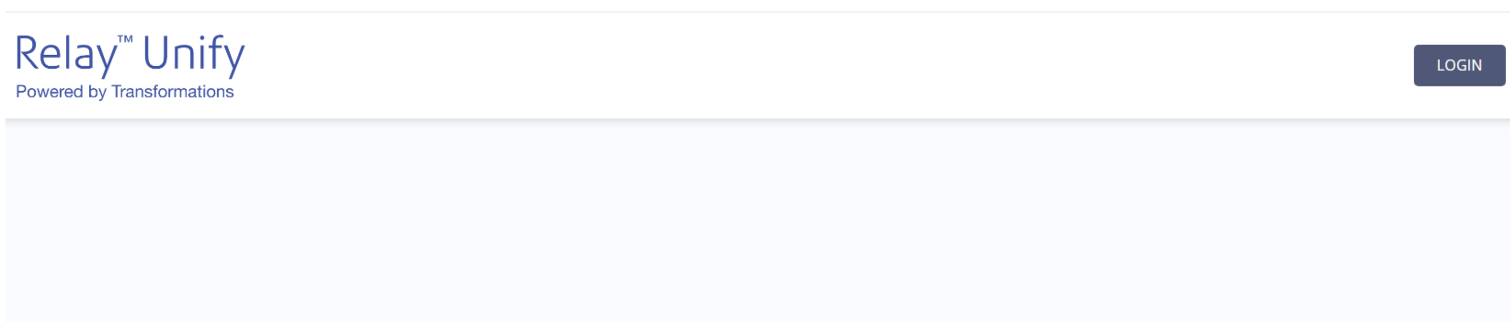
Administrator User ID/Administrator Password – These make up the initial administrator login for the site. This will be the user that you will use to create other users and customize the site. You will use the User ID and Password entered here to log into the site initially. There are no password rules for this initial user.

Administrator First Name/Last Name – This is the profile name that will show on the website as an Admin is logged in.

Copy Pages &CSS From – This allows you to copy pages from an existing website. This is designed for customizing pages off the Relay Unify site tree. The dropdown menu will list all clients that have a site setup. This will only copy custom web pages that have been created. It does not copy any of the other settings from that site.

Click the Initialize Customer for Web button. At this point the site has been created. The very first time the admin user logs in, the site will have to initialize; the pages have to get allocated to the site, and all of the database entries entered for the site. The first time may take up to 60 seconds. After that it will be instantaneous.

At this point the site will look like this:

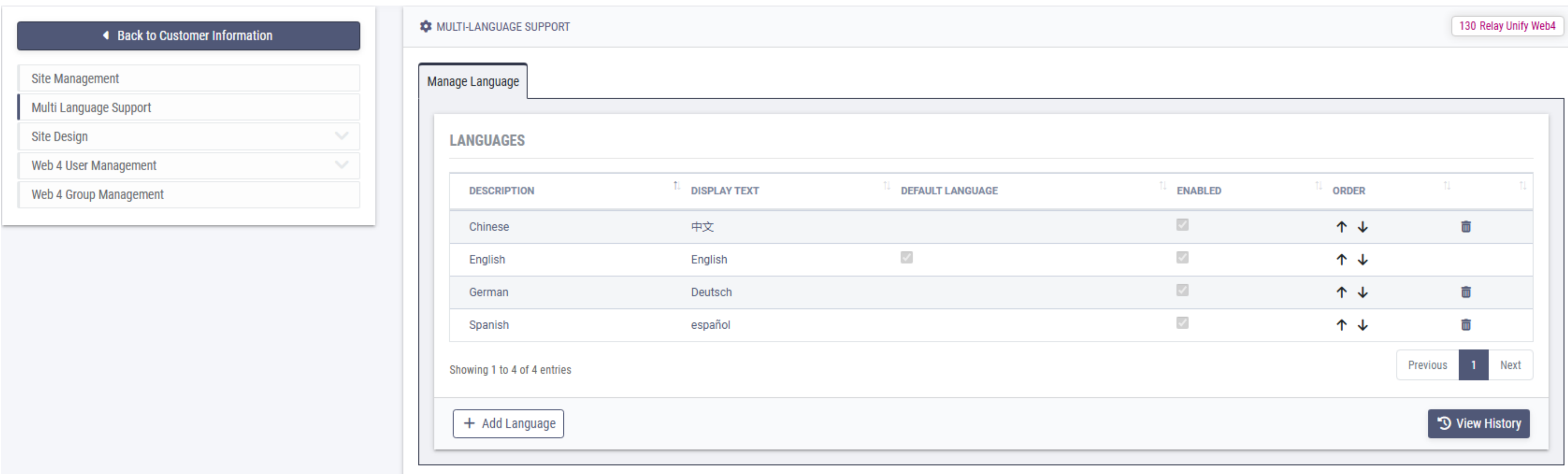


Customizing & Designing the Site

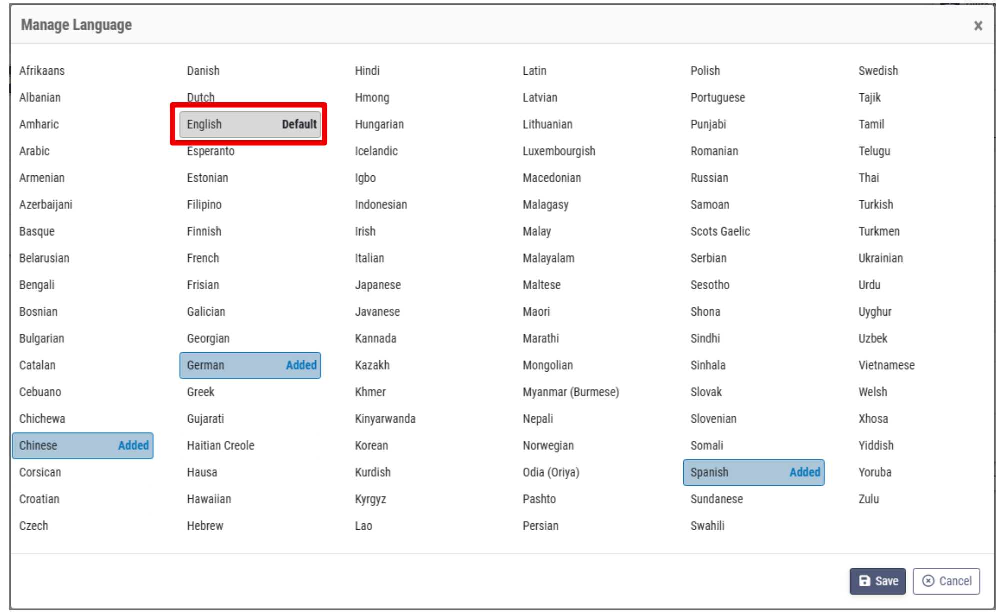
The Site Design Dropdown Tab is where the majority of settings pertaining to the site's appearance are located.

Multi Language Support

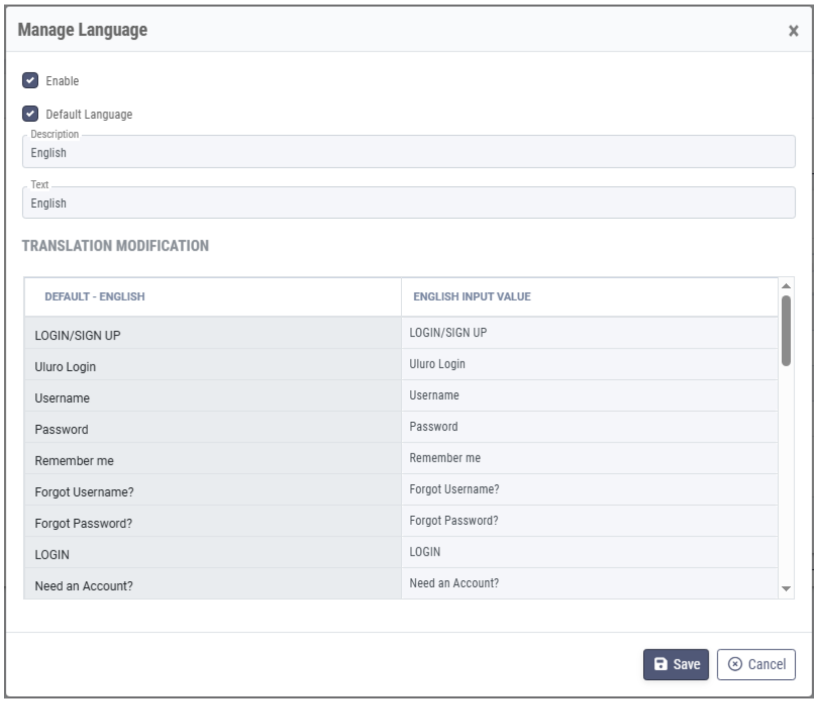
This is the first tab on the left-hand side of the web designer, underneath the Site Management tab. This is where you can go to set your default language for the website you are designing, as well as choose additional languages you'd like to make available via a dropdown on the website. By default, English will be selected as the default language for your site designer.



+ Add Language – Click on this button to add, or remove languages that will be made available on the website in question. Choose your languages and click on the Save button.

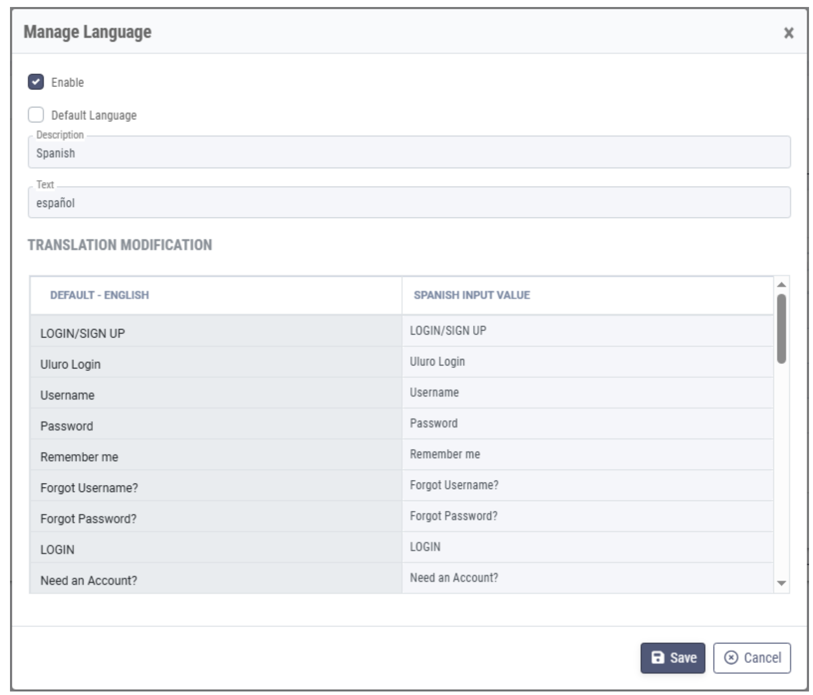


Once you've selected all your languages, you can then click on one of the options on the "Manage Language" tab of the Multi Language Support tab. You can edit, enable, make default, etc.



Enable – Check this box to turn on or off the language in question.

Default Language – Check this box to make this the default language when going to the web portal.



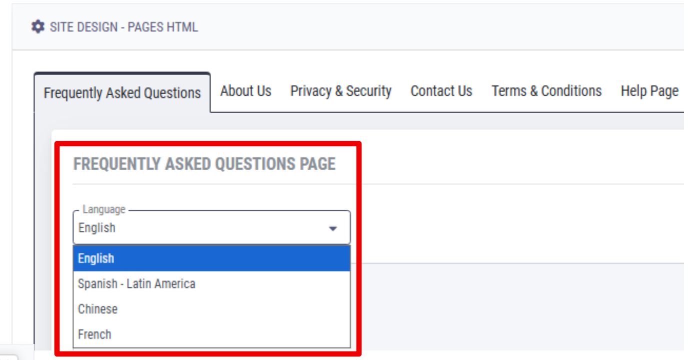
Description – This is the name that will be used to identify the language being used in uSetup Web under the Multi Language Support tab.

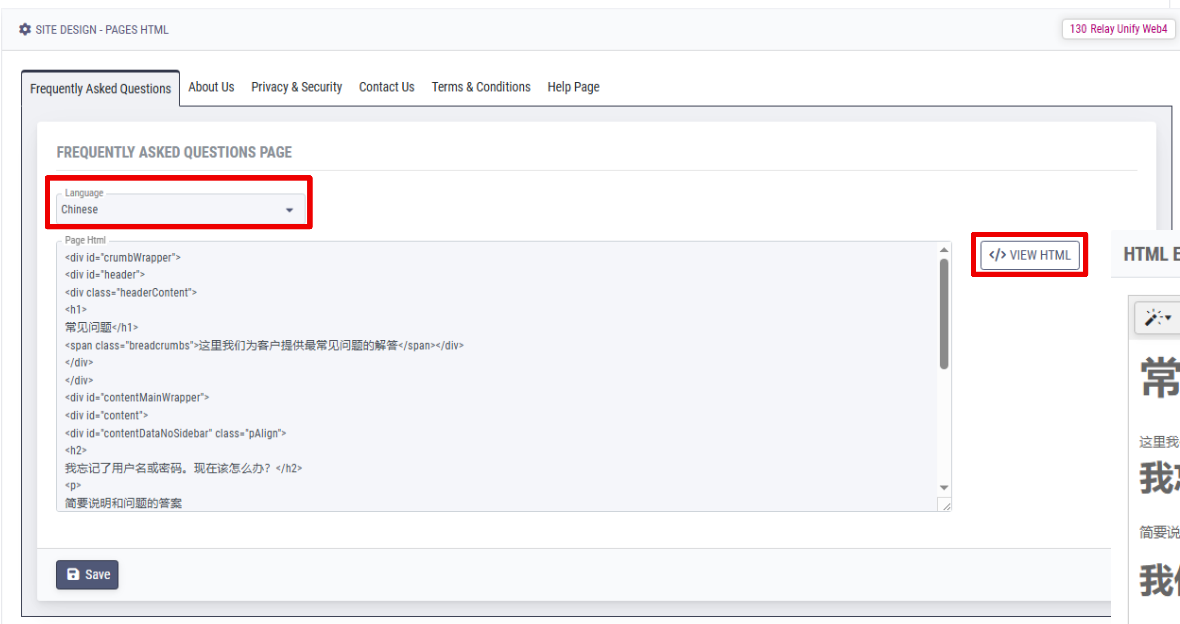
Text – This is how the language will be displayed in it's native text.

Translation Modification – Here you will see the Default language, as well as the current foreign language you are looking to edit. You can go in and enter the text how it should actually be translated, in the event that the translation is not accurate to the local dialect of where the web portal will be used for that language.

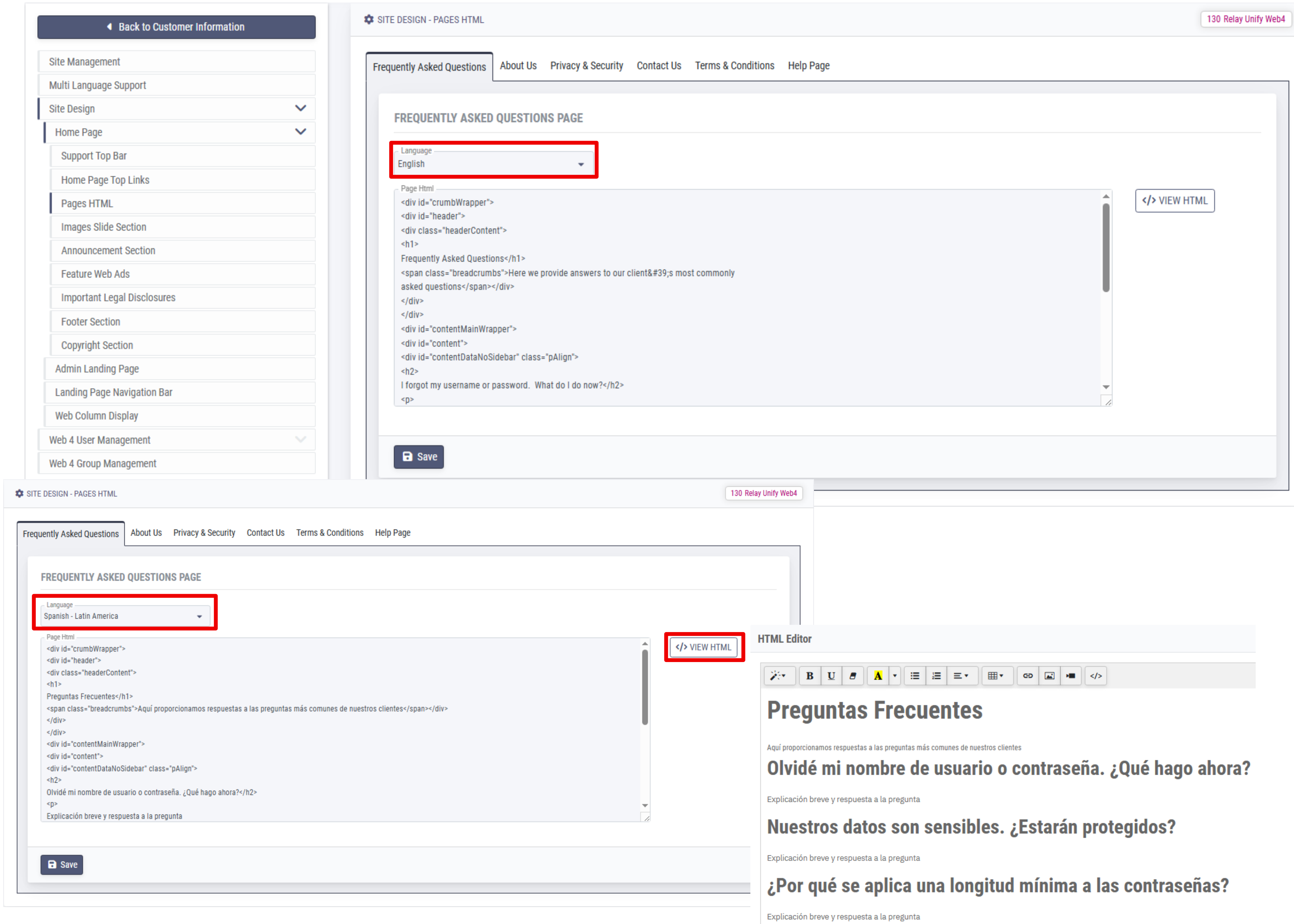
Once finished with the updates for the language, click the Save button to update.

From there, once you have all of your languages set up, you can now view them in various dropdowns through the site designer. You can now set your images, as well as all of the text you'd like in this particular language.

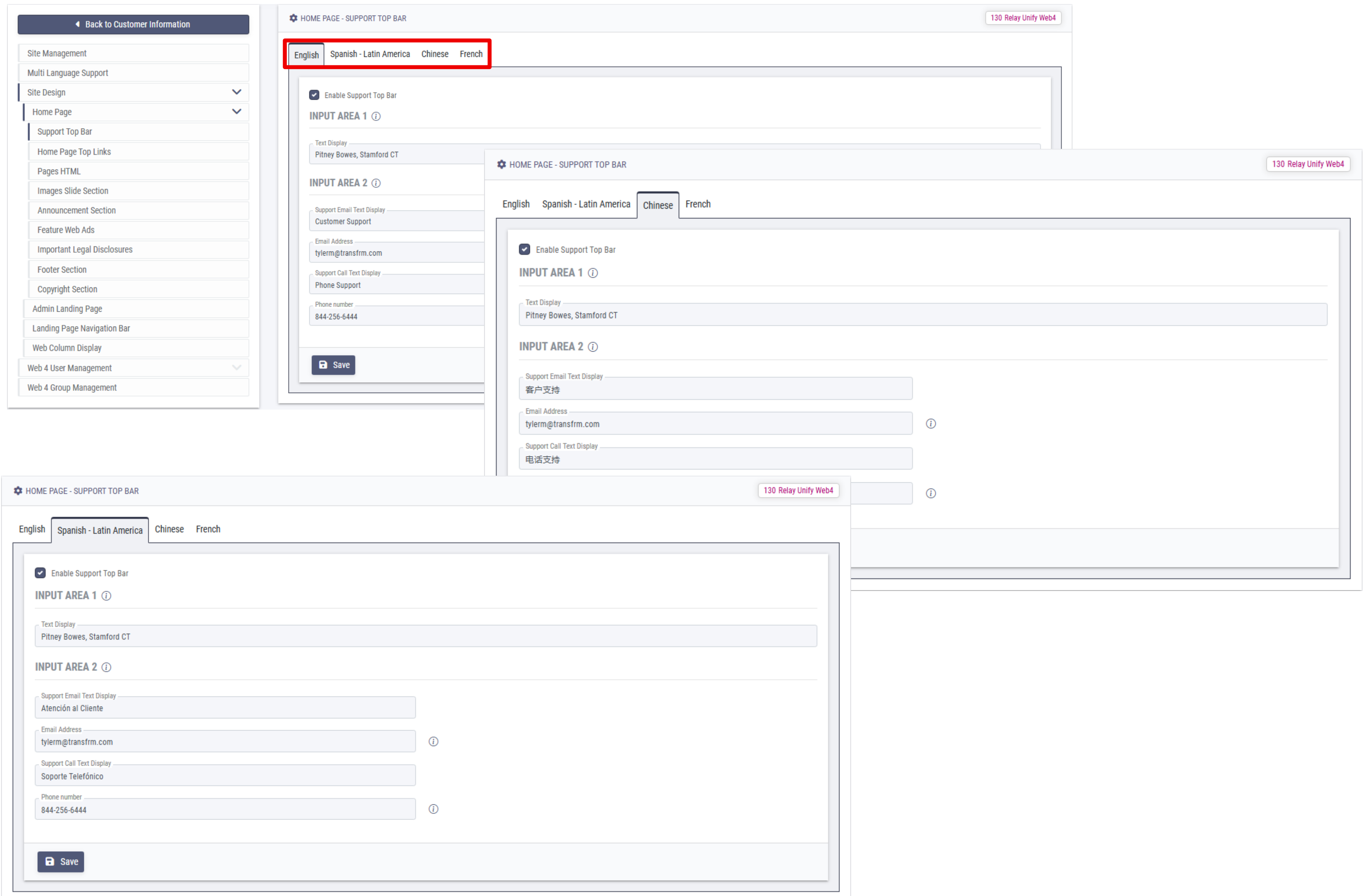




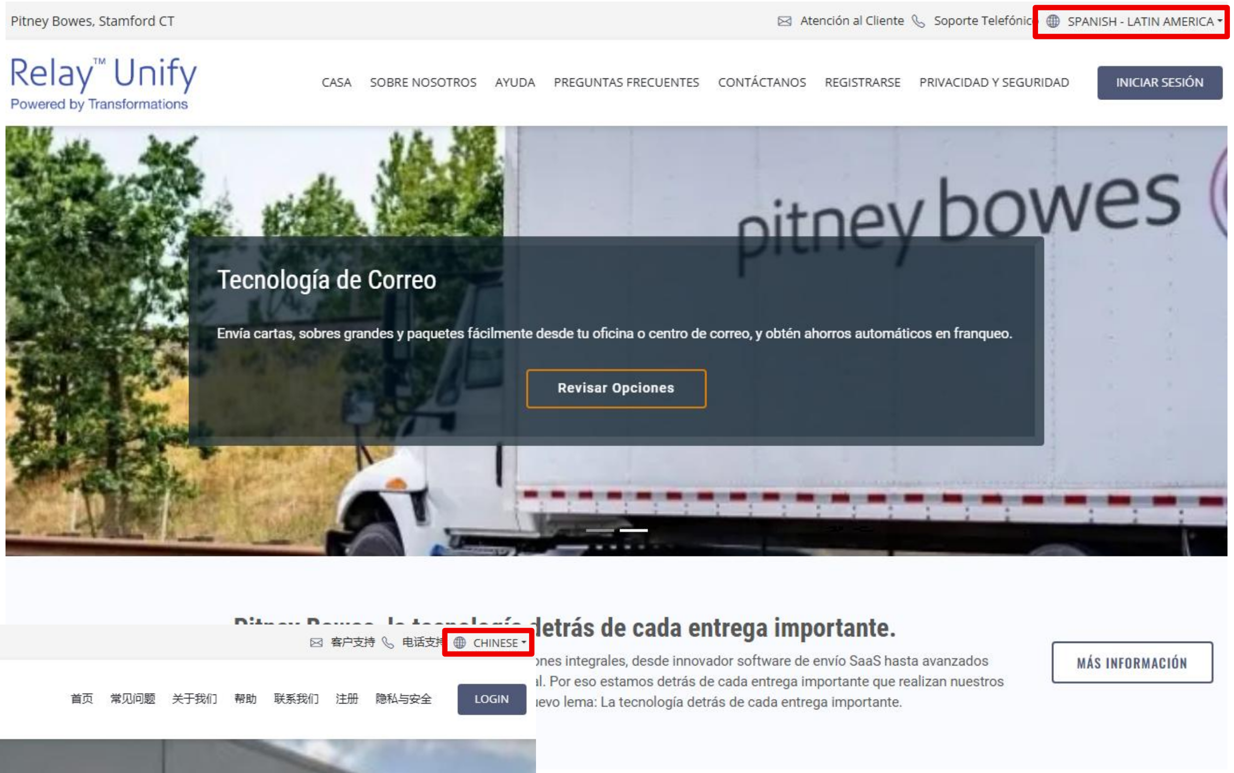
In the event that there is the </> View HTML button, you can also click on that to view the language that you've set the code for.

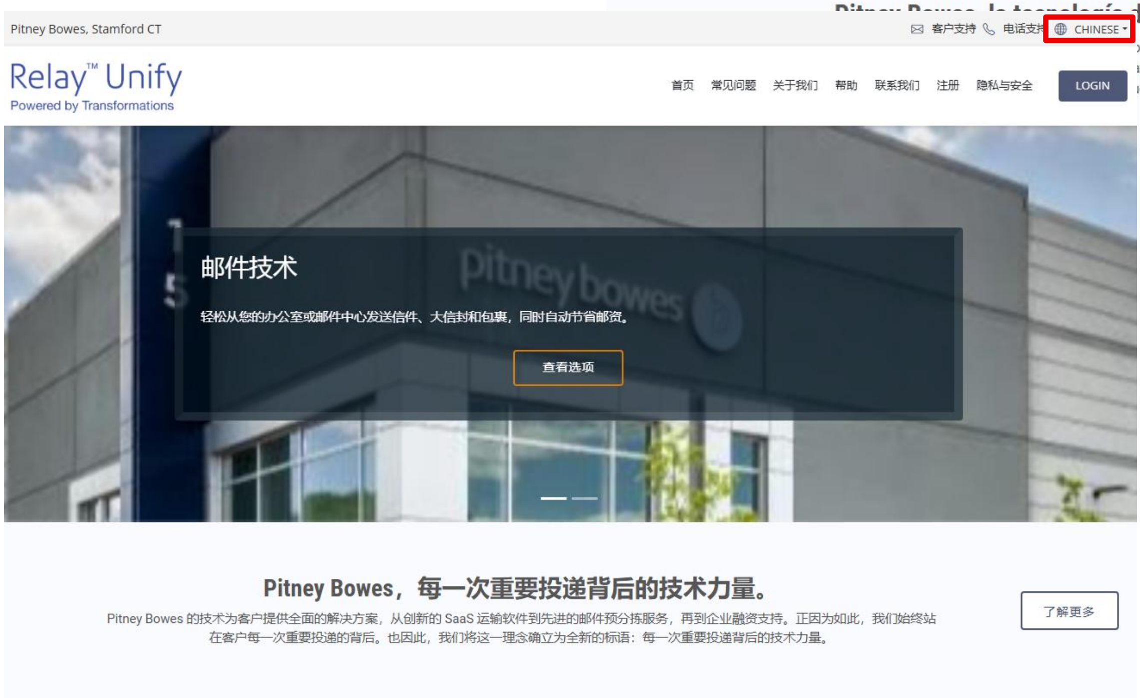

Back to Customer Information
Site Management
Multi Language Support
Site Design
Home Page
Support Top Bar
Home Page Top Links
Pages HTML
Images Slide Section
Announcement Section
Feature Web Ads
Important Legal Disclosures
Footer Section
Copyright Section
Admin Landing Page
Landing Page Navigation Bar
Web Column Display
Web 4 User Management
Web 4 Group Management
SITE DESIGN - PAGES HTML
130 Relay Unify Web4
Frequently Asked Questions
About Us
Privacy & Security
Contact Us
Terms & Conditions
Help Page
FREQUENTLY ASKED QUESTIONS PAGE
Language
English
Page Html
<div id="crumbWrapper">
<div id="header">
<div class="headerContent">
<h1>
Frequently Asked Questions</h1>
Here we provide answers to our client's most commonly asked questions</div>
</div>
</div>
<div id="contentMainWrapper">
<div id="content">
<div id="contentDataNoSidebar" class="pAlign">
<h2>
I forgot my username or password. What do I do now?</h2>
<p>
VIEW HTML
Save
SITE DESIGN - PAGES HTML
130 Relay Unify Web4
Frequently Asked Questions
About Us
Privacy & Security
Contact Us
Terms & Conditions
Help Page
FREQUENTLY ASKED QUESTIONS PAGE
Language
Spanish - Latin America
Page Html
<div id="crumbWrapper">
<div id="header">
<div class="headerContent">
<h1>
Preguntas Frecuentes</h1>
Aquí proporcionamos respuestas a las preguntas más comunes de nuestros clientes</div>
</div>
</div>
<div id="contentMainWrapper">
<div id="content">
<div id="contentDataNoSidebar" class="pAlign">
<h2>
Olvidé mi nombre de usuario o contraseña. ¿Qué hago ahora?</h2>
<p>
Explicación breve y respuesta a la pregunta
VIEW HTML
Save
HTML Editor
Preguntas Frecuentes
Aquí proporcionamos respuestas a las preguntas más comunes de nuestros clientes
Olvidé mi nombre de usuario o contraseña. ¿Qué hago ahora?
Explicación breve y respuesta a la pregunta
Nuestros datos son sensibles. ¿Estarán protegidos?
Explicación breve y respuesta a la pregunta
¿Por qué se aplica una longitud mínima a las contraseñas?
Explicación breve y respuesta a la pregunta

Other than having the dropdown as an option to select a language, you will also get tabs across the top of the selected tab on the left, to choose your language and edit this portion of the website.



This is an example of what your additional home pages will look like after setting up images and other text in the Web 4 site designer, when you select a language from the dropdown menu in the top right corner of the web portal.





Home Page

Feature Web Ads

Along the left side, select Home Page. Then click the Ads tab. This is where the images on the main site are customized. You can manage multiple Ads on the homepage.

Description – Enter a description that will easily identify the area that the image is located.

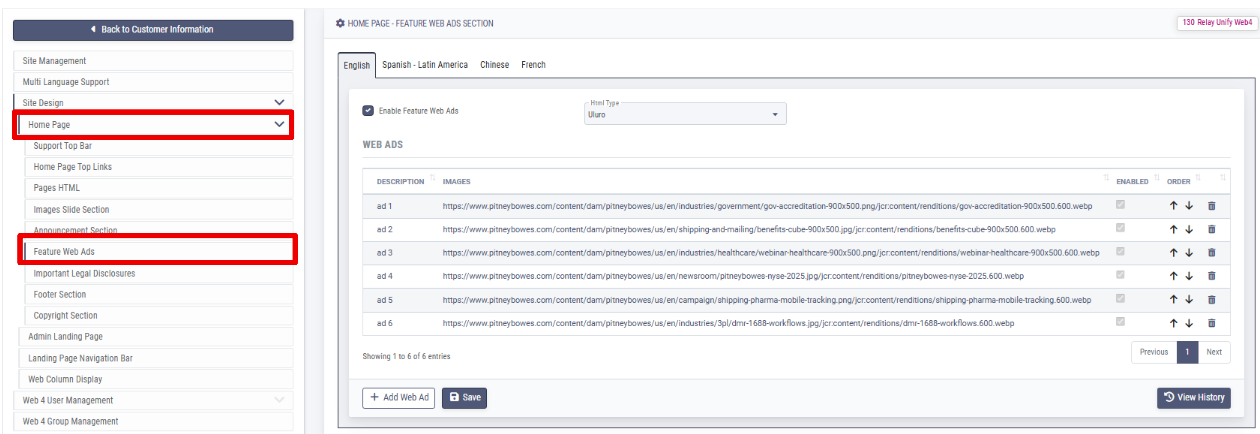
Image – This is using a relative path from the images directory. Enter the path to the image desired for that area.

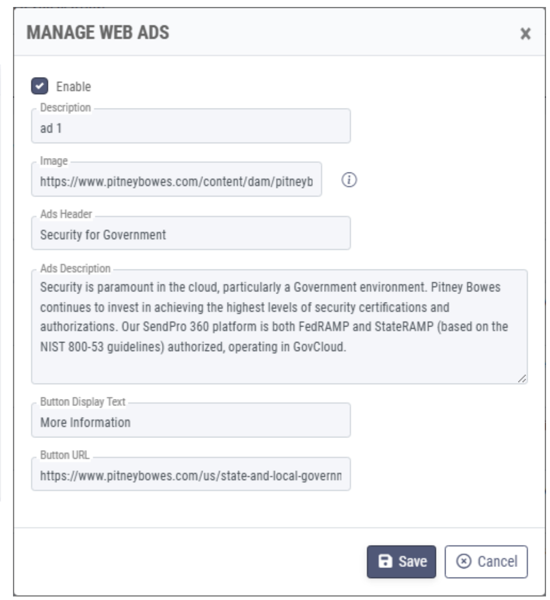
Ads Header – This header will show the title that you choose for this particular ad.

Ads Description – This is the description that will be displayed in the ad block for the ad in question.

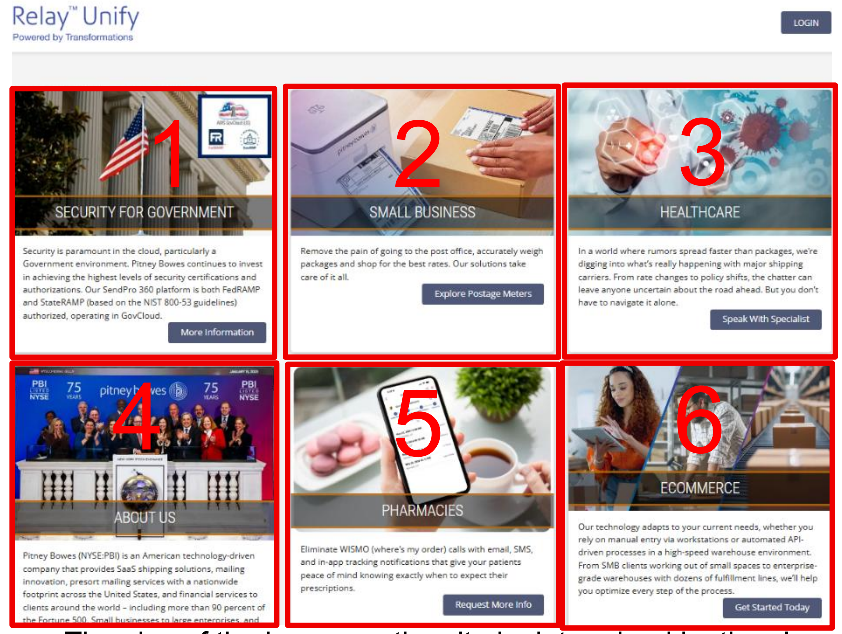
Button Display Text – Display a button in the ad in question and enter the text desired.

Button URL – This is the site that a user will be redirected to if the button is clicked. It must have an http:// or https://. This field is required to save the entry. If a new site is not desired, enter # to reload the current page.



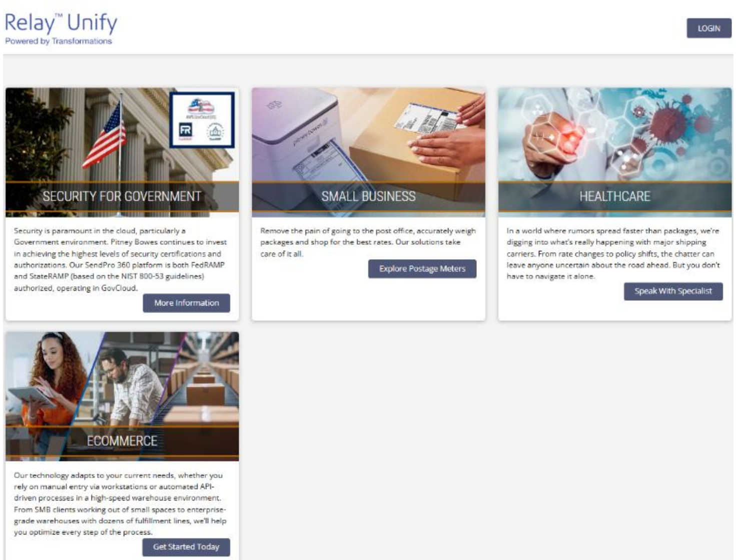


Order – This corresponds to the numbered blocks to the right of position. Click the arrows to move the ads up or down for desired position.

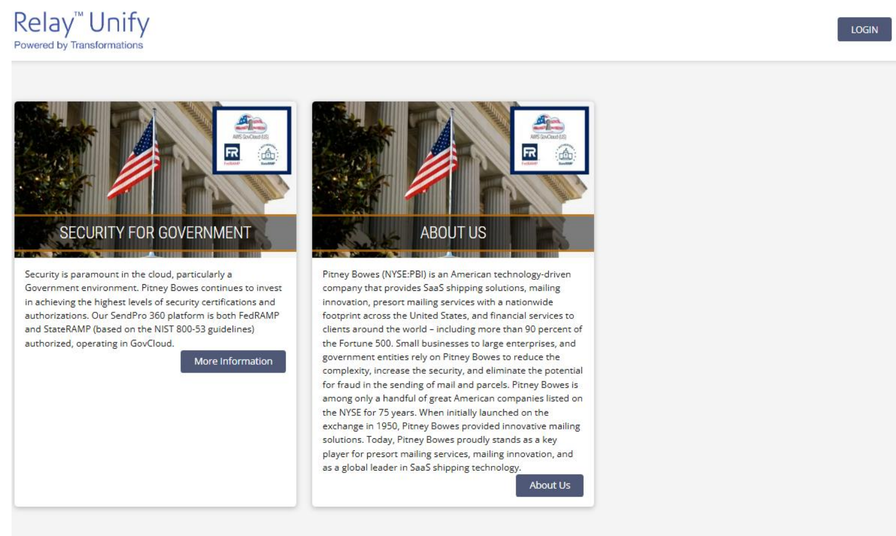


Enabled – If this is checked, the image will appear on the site.

If some areas are not enabled, the images will shift position to fill gaps. If area 4 and area 5 are not enabled:



The size of the image on the site is determined by the size of the image itself. If area 1 and area 4 have the same image:



Tips:

The Relay Unify images are on your server from the install for you to reference.

You can use these images for your ads to begin with before customizing them.

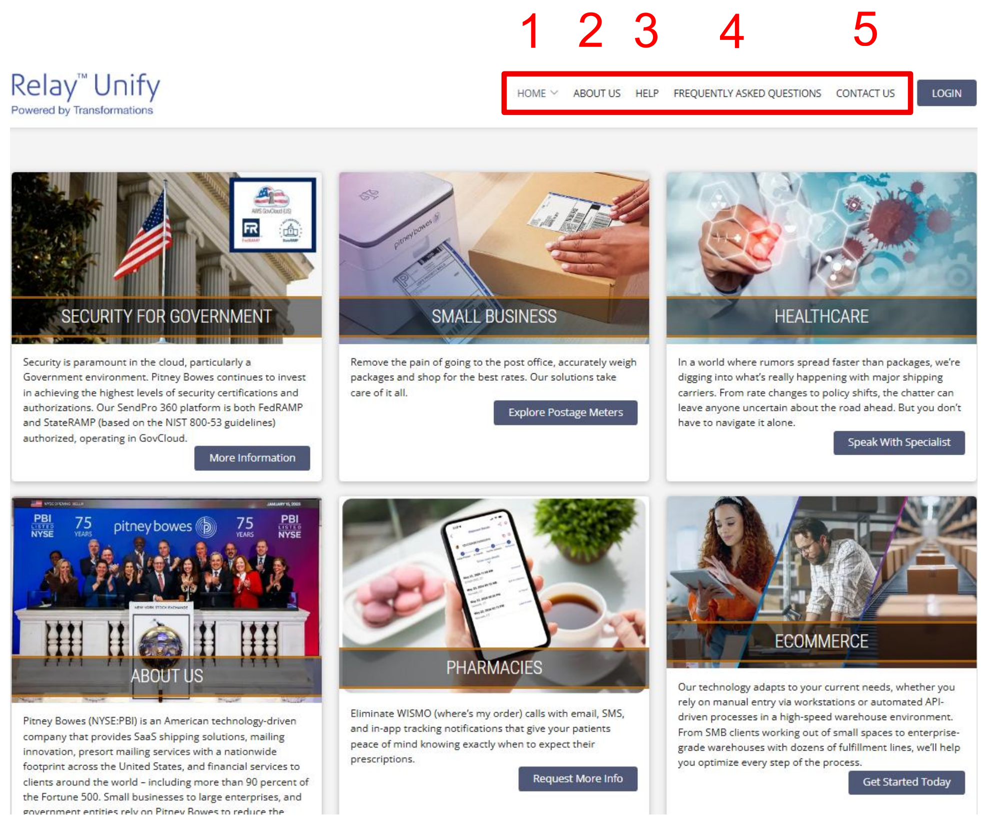
To keep your ads uniform, try to get images relatively similar in size.

Size does not matter for location in Web4.

feature1.png	5/20/2025 7:46 AM	PNG File	257 KB
feature2.png	5/20/2025 7:46 AM	PNG File	259 KB
feature3.png	5/20/2025 7:46 AM	PNG File	296 KB
feature4.png	5/20/2025 7:46 AM	PNG File	359 KB
feature5.png	5/20/2025 7:46 AM	PNG File	351 KB
feature6.png	5/20/2025 7:46 AM	PNG File	254 KB
featuresection.png	5/20/2025 7:46 AM	PNG File	237 KB
h1.jpg	5/20/2025 7:46 AM	IrfanView JPG F...	1,348 KB

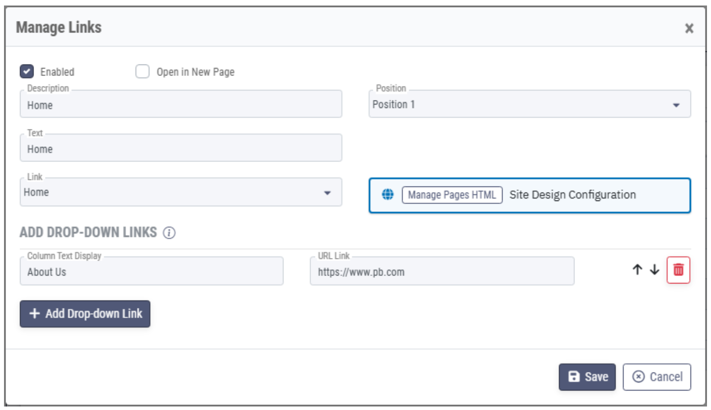
Home Page Top Links

This controls the links across the main site menus on the top of the page. To edit these go to the Site Design Dropdown Tab under the Web4 Tab. Select the Home Page Dropdown Tab on the left side and then select the Home Page Top Links Tab. There are 7 slots to put links in.



Description – This will be displayed as the link itself on the portal.

Text – This will be displayed in uSetup to identify the link in question.



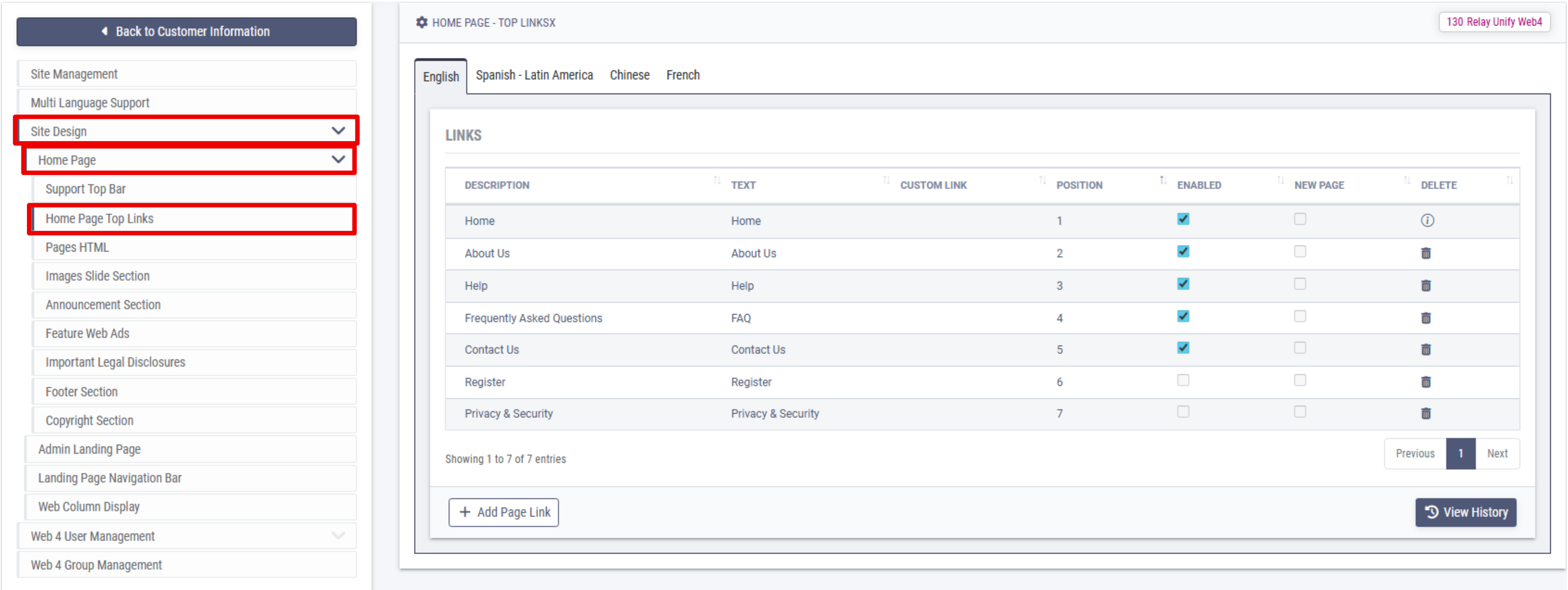
Link – This is the page that the user will go to when the link is clicked. Choose from the 8 that are set up by default or choose **Custom**. Once custom is selected, an area to enter any link will appear. The custom link entered will need to have http:// or https://.

Position – This determines where the link is displayed across the top of the home page and will be displayed from Left to Right, positions 1 to 7.

Enabled – If this is checked, the link will appear on the site.

Open in New Page – If this is checked, the hyperlink will open in a new tab/window when an image with a hyperlink is selected.

Dropdown Link Column Text Display – You have the ability to add a dropdown tab to any of your 7 Home Page links that you may have enabled. **URL Link**, this will give you the ability to open this additional link at a different location.



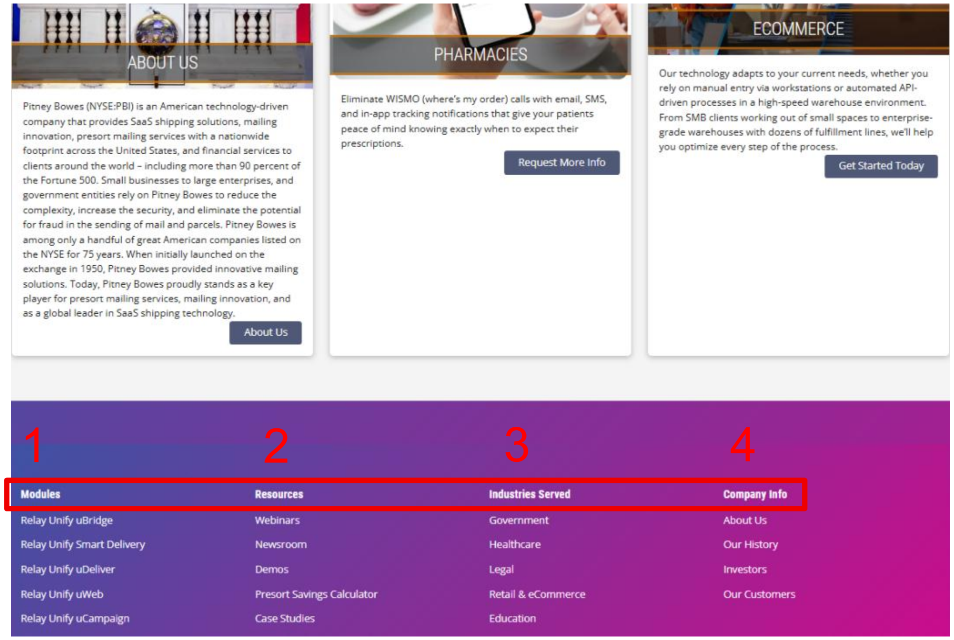
Tips:

If only positions 1, 2, 4, 7 are enabled, they will be displayed as 1, 2, 3, 4 across the top. If a link (ex: Privacy & Security) is placed in a position (1) that is already occupied, it will be given that new position (Privacy & Security-1) and the link previously in that position will be moved to the next (Home_Text – 2) postion. All other links will be moved to the next position as well.

To edit the text for these links go to the Home Page Top Links Tab along the left hand side of the Relay Unify Web4 builder.

Footer Section

This controls the links at the bottom of the page on your site. To edit these go to the Site Design Dropdown Tab under the Web4 Tab. Select the Home Page Dropdown Tab on the left side and then select the Footer Section Tab. There are multiple slots to put links in. You have the ability to add additional footer links underneath the header.



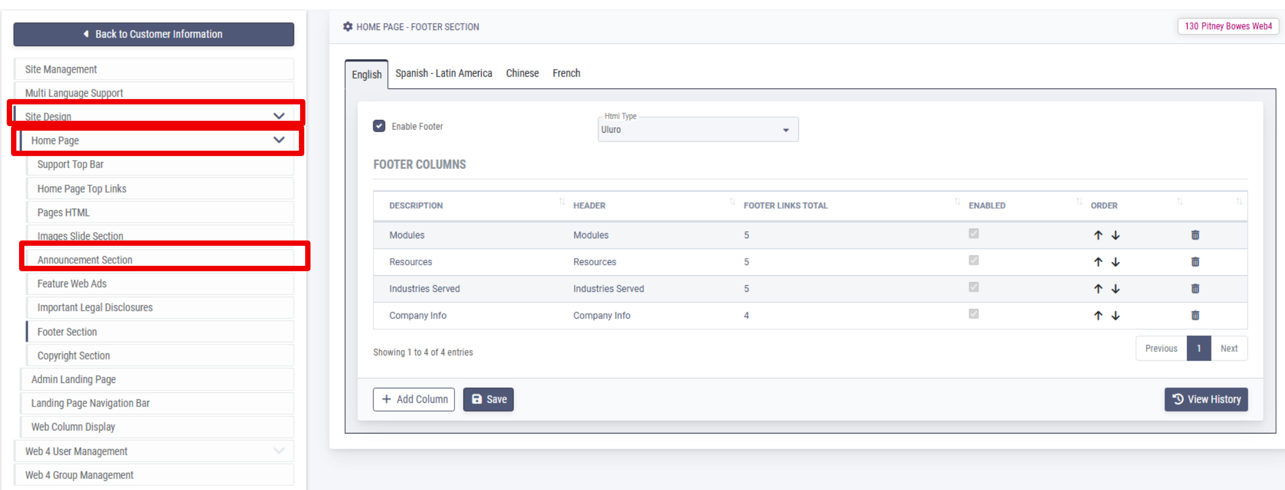
Enabled – If this is checked, the link will appear on the site.

Description – This is name that will be visible on the web portal.

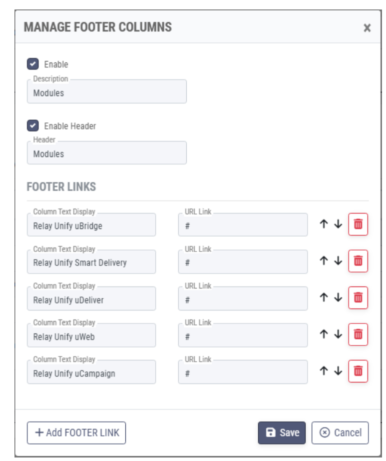
Enable Header – If this is checked, the link will appear on the site.

Header – This is the name of the footer that will be visible on uSetup Web.

Column Text Display – This is the text that will be displayed as a link under the footer.



URL Link – You can link an outside site to the footer you want this tied to. If you don't want another site to be opened up, just enter a #.



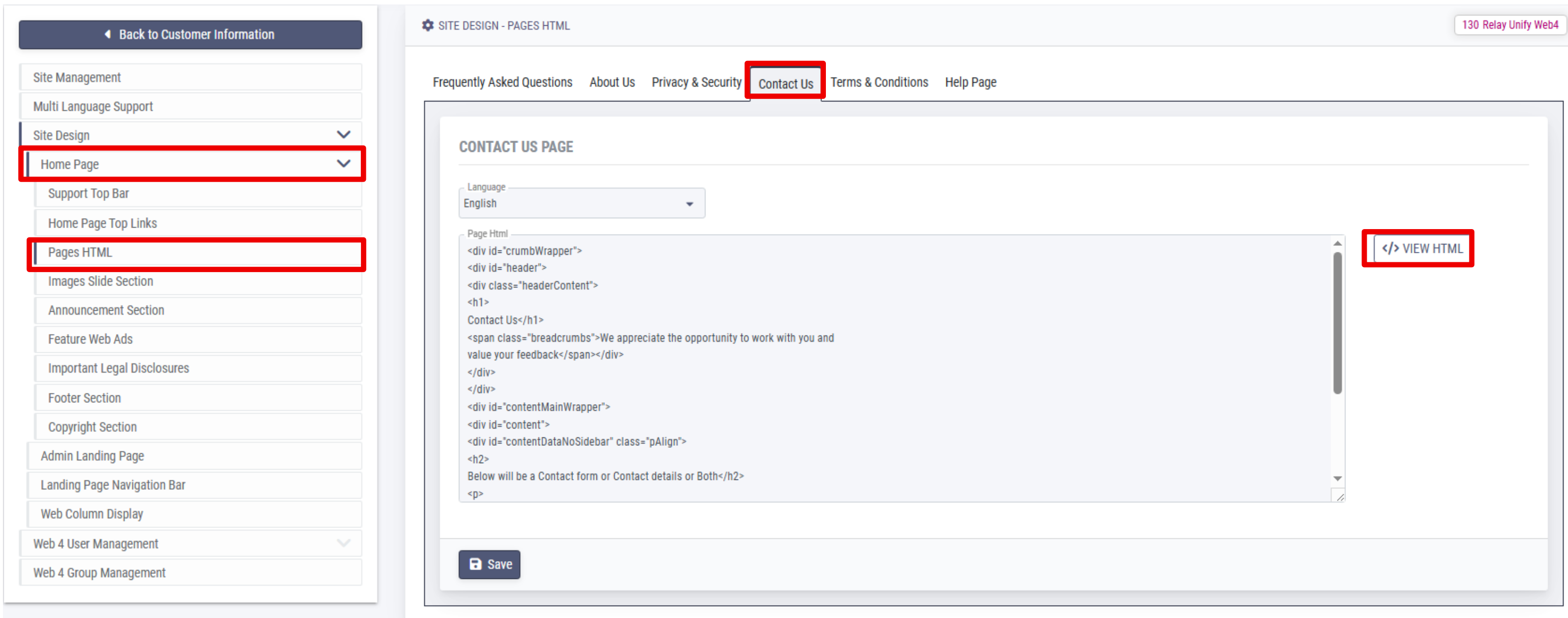
+ Add Footer Link – This is how you add additional footer links to your web portal. You can add as many footer links as you want.

Pages HTML

To edit the pages that the links are tied to on the main site page, go to the Site Design Dropdown Tab > Home Page Dropdown Tab and select Pages HTML on the left side.

There is an additional set of tabs which include the links that can be edited:

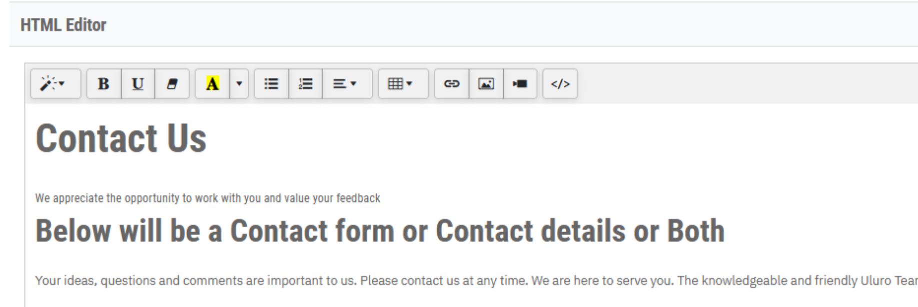
- FAQ
- About Us
- Privacy & Security
- Contact Us
- Terms
- Help



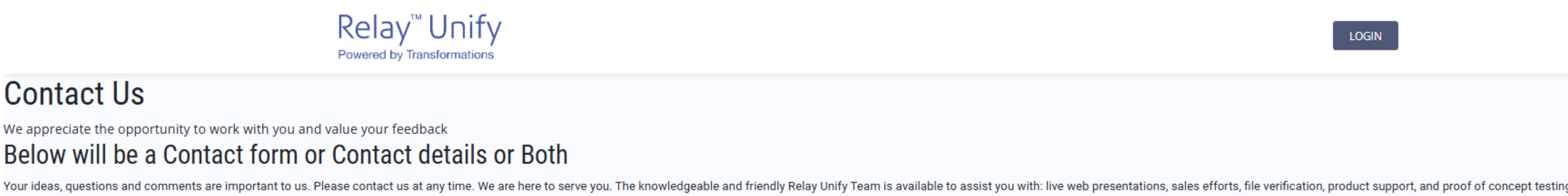
Home cannot be edited since it does not link to a new page of text to edit. Register takes users to a page designed already to self-register for the site. The email event for that can be customized under Web4 User Management Dropdown Tab > Email Event.

Contact Us

Within the Pages HTML edit the HTML and click View HTML to see how the text will appear:



Click the link on the main site page to view the linked page users will be directed to:

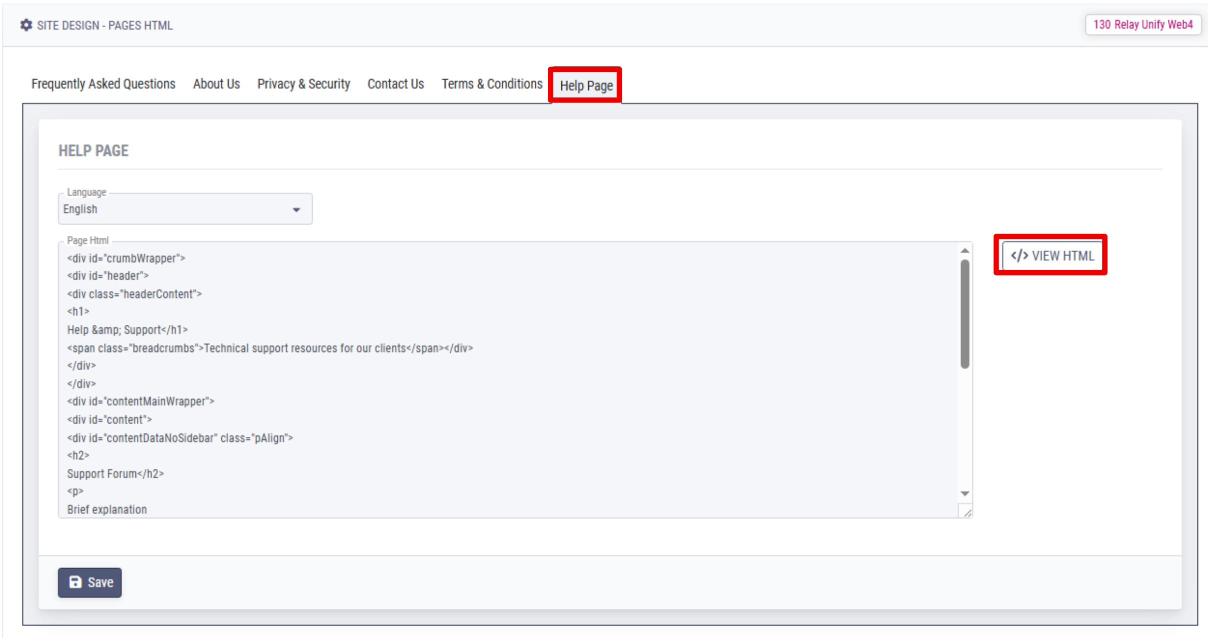


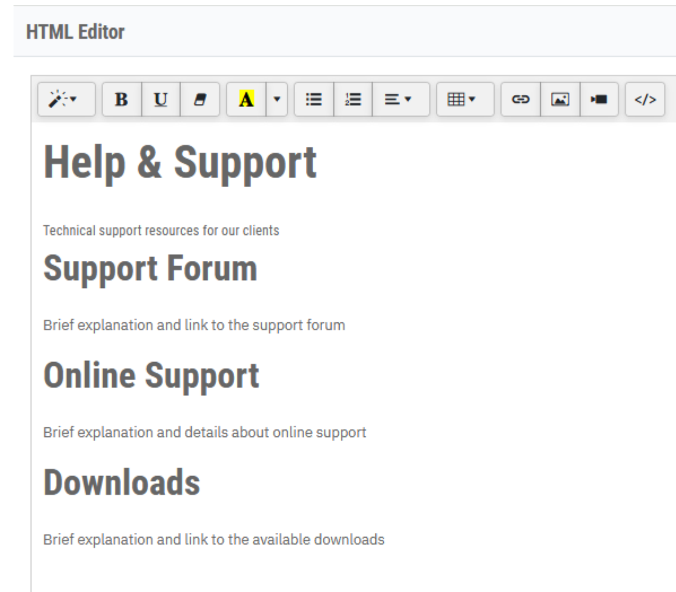
Tips:

Most of these are just a template of filler text so we recommend editing these before users access the site!

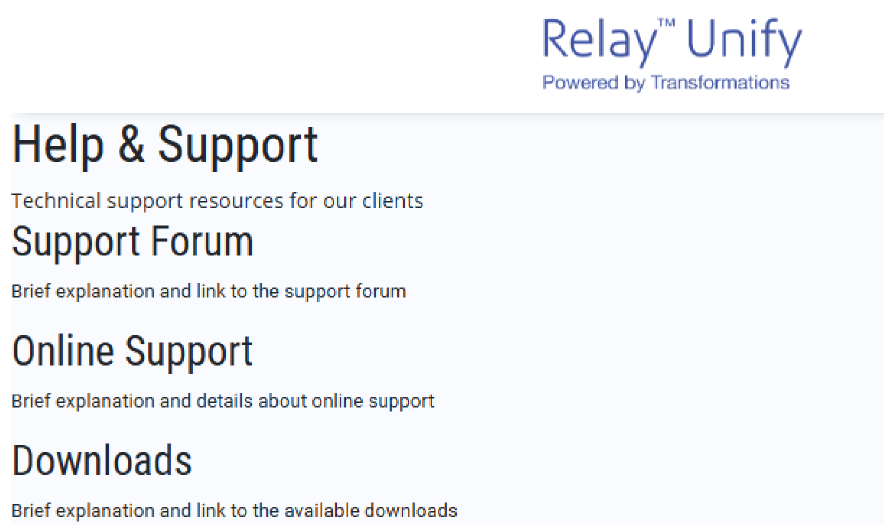
Help

Within the Pages HTML edit the HTML and click View HTML to see how the text will appear:



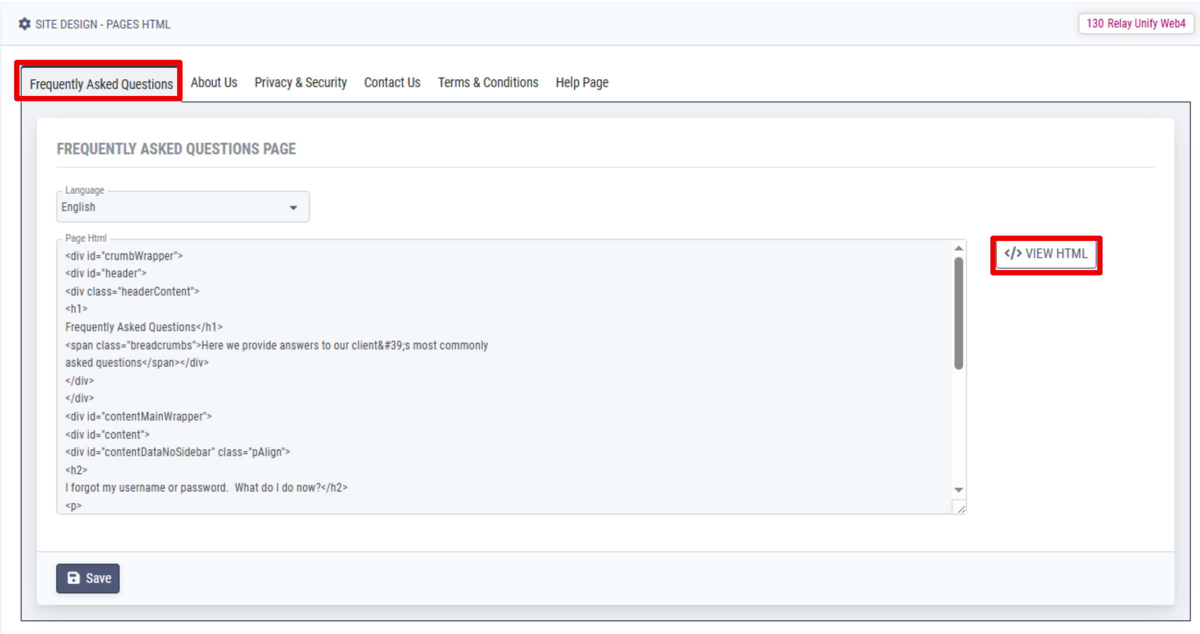


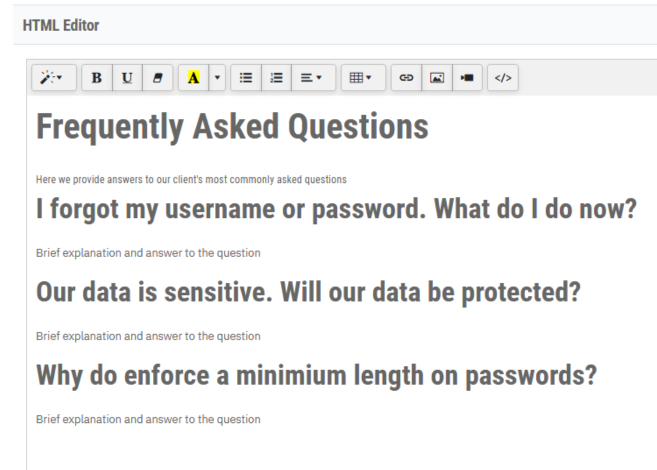
Click the link on the main site page to view the linked page users will be directed to:



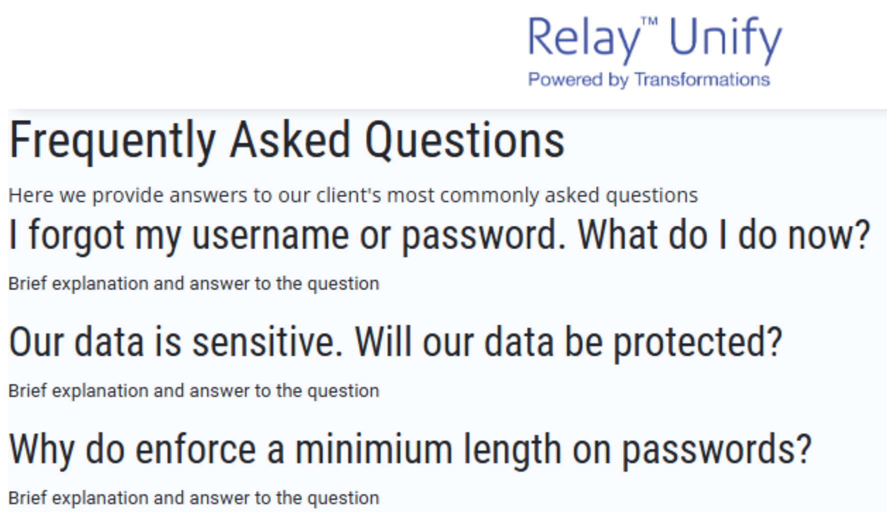
FAQ

Within the Pages HTML edit the HTML and click View HTML to see how the text will appear:



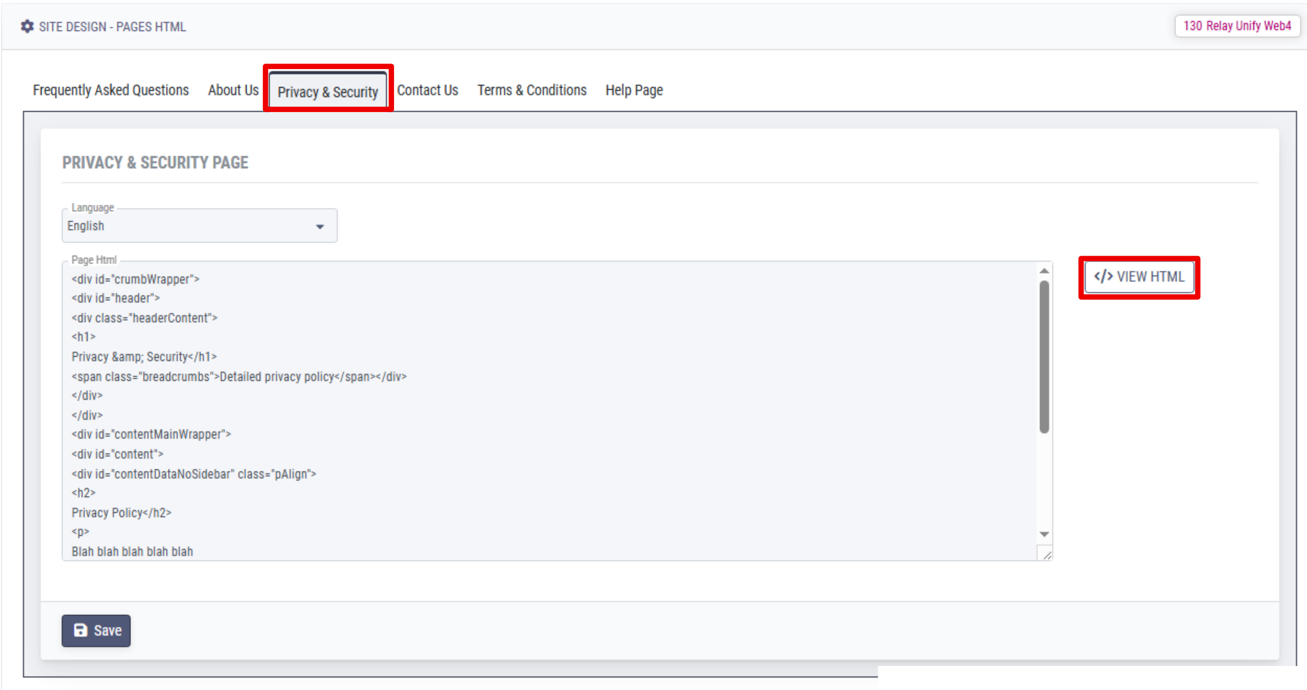


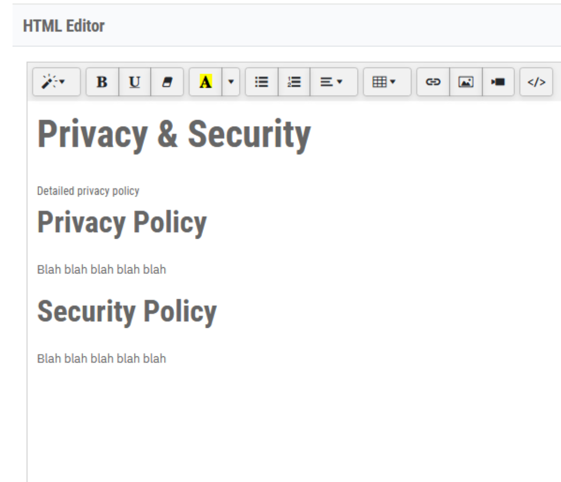
Click the link on the main site page to view the linked page users will be directed to:



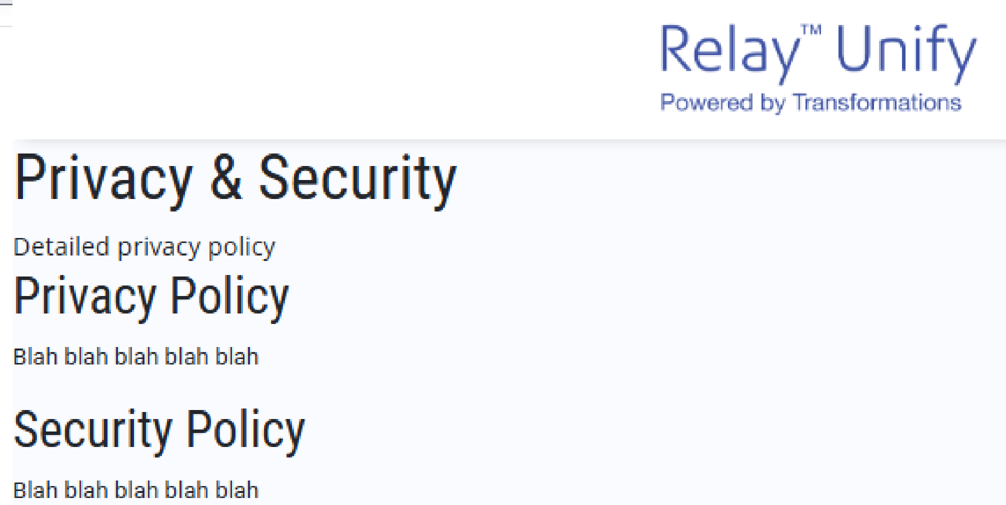
Privacy & Security

Within the Pages HTML edit the HTML and click View HTML to see how the text will appear:



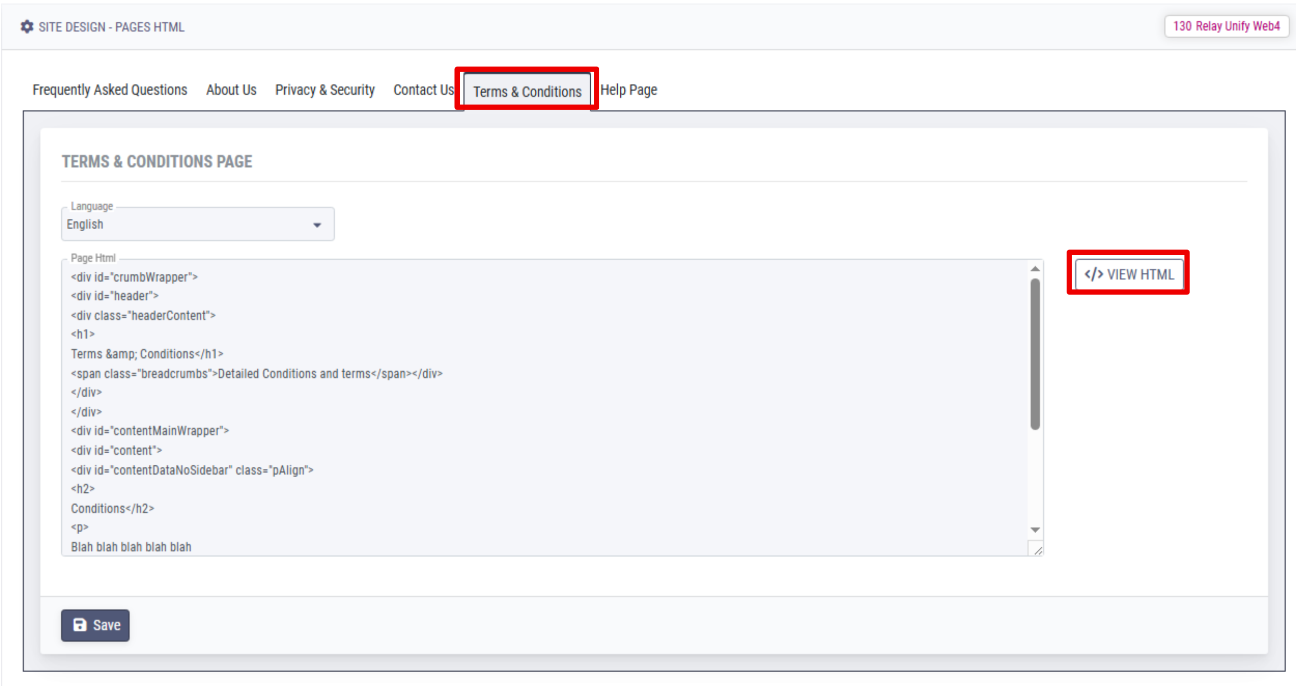


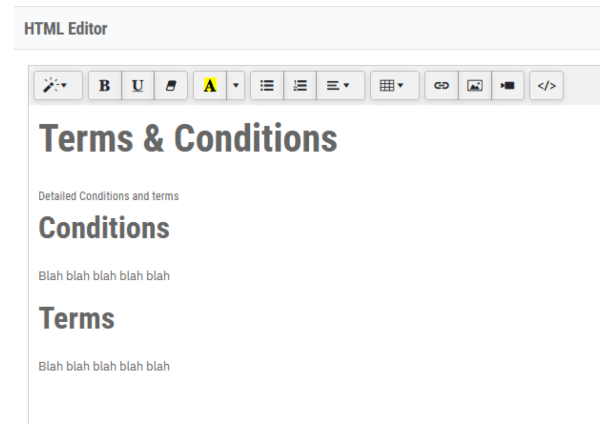
Click the link on the main site page to view the linked page users will be directed to:



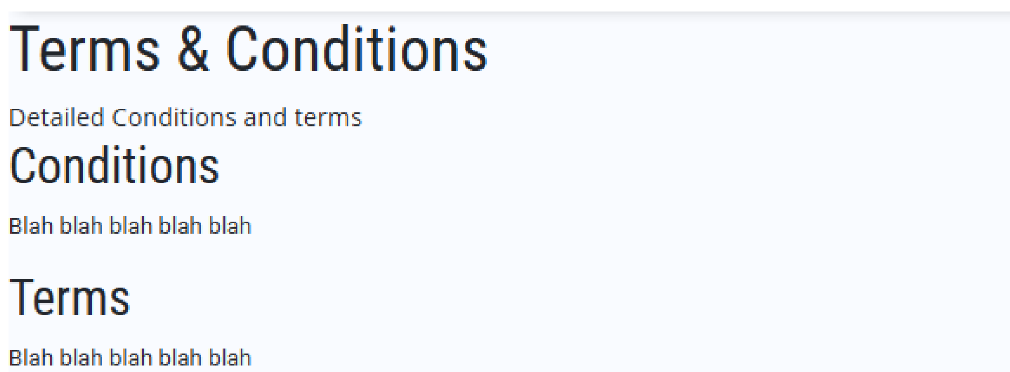
Terms & Conditions

Within the Pages HTML edit the HTML and click View HTML to see how the text will appear:



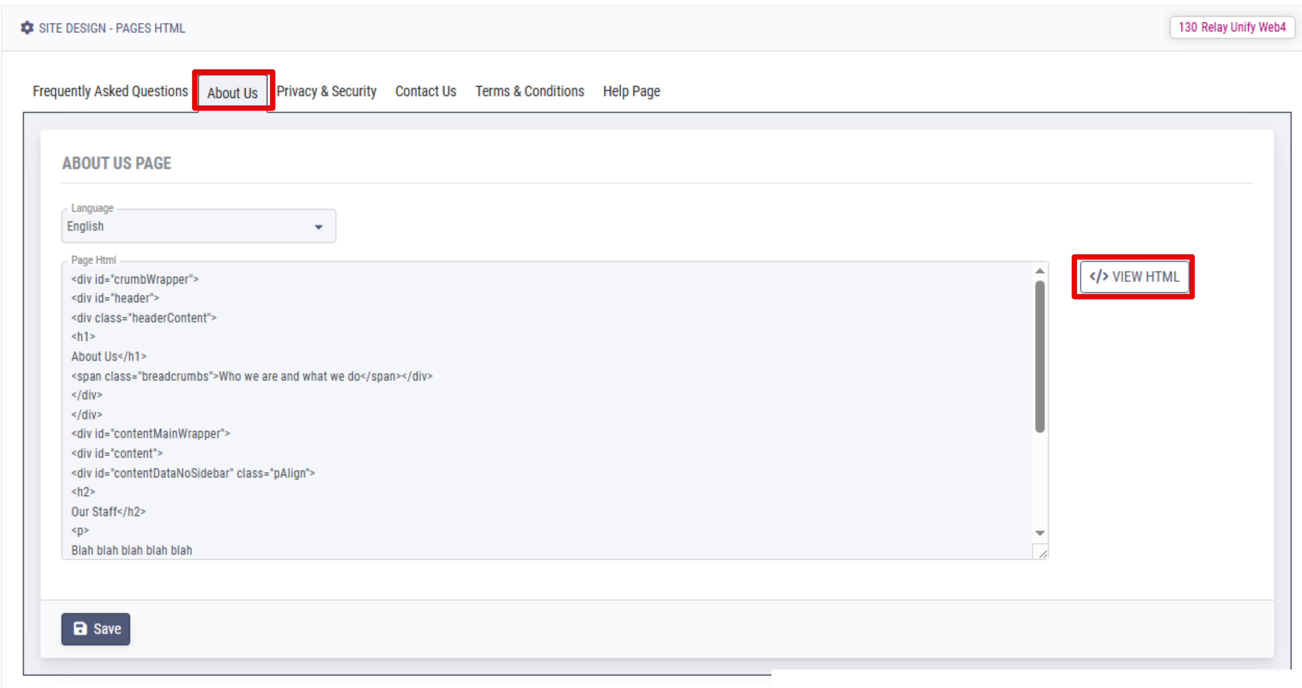


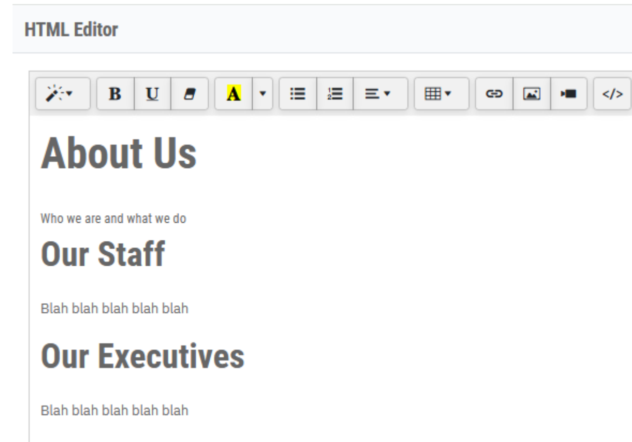
Click the link on the main site page to view the linked page users will be directed to:



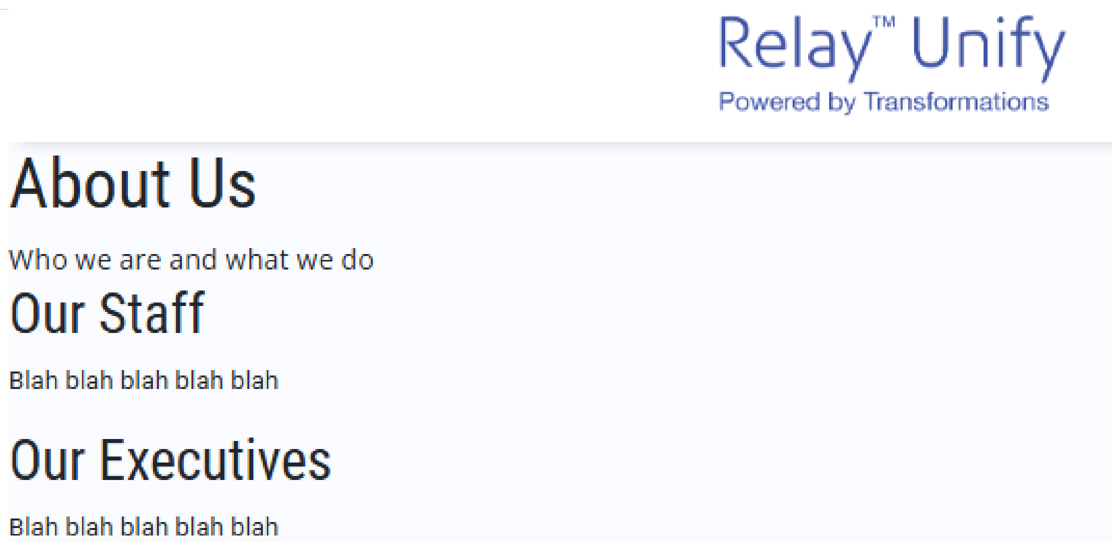
About Us

Within the Pages HTML edit the HTML and click View HTML to see how the text will appear:





Click the link on the main site page to view the linked page users will be directed to:

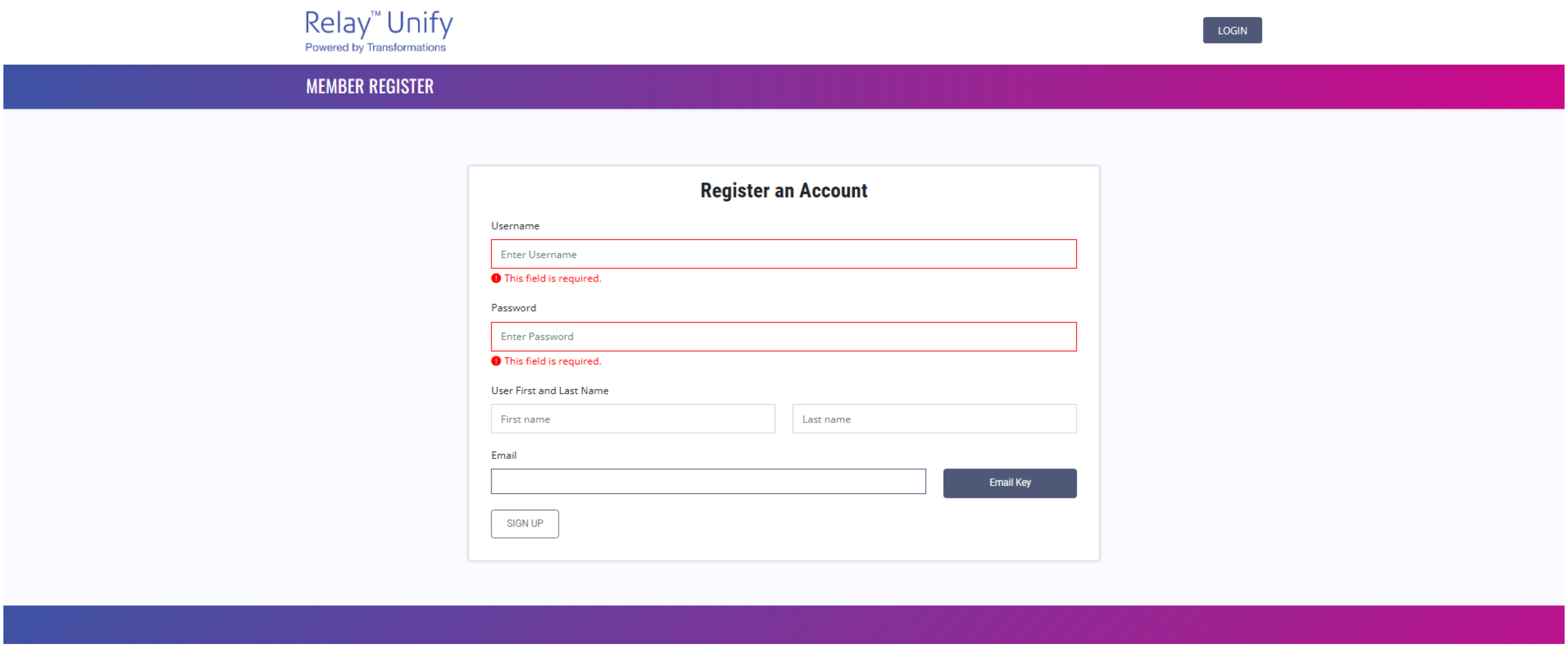


Home

This cannot be edited; this is to bring users back to the main site when the links redirect them to other pages. This can be disabled but not edited.

Register

Click the link on the main site page to view the linked page users will be directed to:



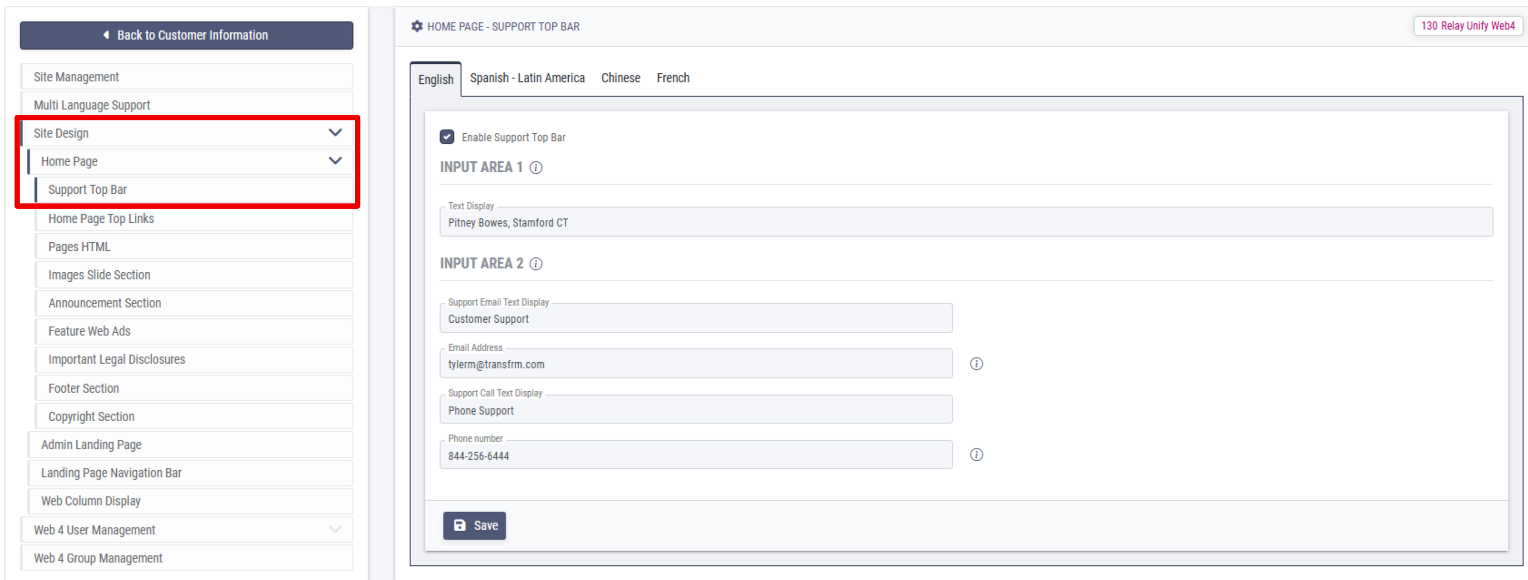
See Web 4 User Management Tab to edit the self-registration page that users are redirected to when clicking Register.

Support Top Bar

This gives you the ability to customize the very top of the page that will give you a Support Email and Phone Number as a link for contacting the companys site. To edit these go to the Site Design Dropdown Tab under the Web4 Tab. Select the Home Page Dropdown Tab on the left side and then select the Support Top Bar Tab. There are 2 Input areas to put links in.

Enable Support Top Bar – By clicking on this check box, it will activate the bar across the top of this customers website.

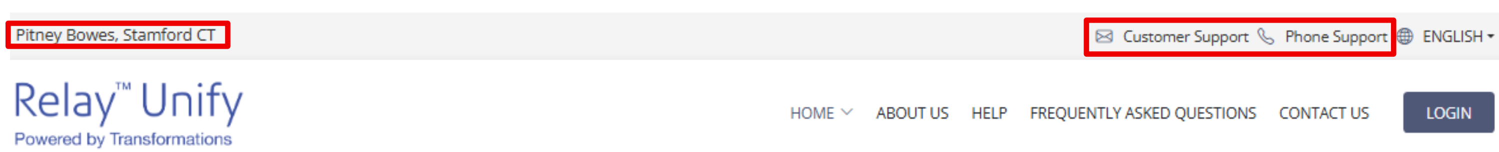
Input Area 1/ Text Display – Area 1 will appear on the left side of the website. You can enter any text you want here and it will be displayed on the website.



Input Area 2 – This area you can enter in a support phone number and email to contact the customer that the website is built for.

Support Email Text Display – This will the be the text that is displayed as a link on the right hand side of the website to contact the customer via email.

Email Address – This is the email address that is linked to the text displayed on the website.

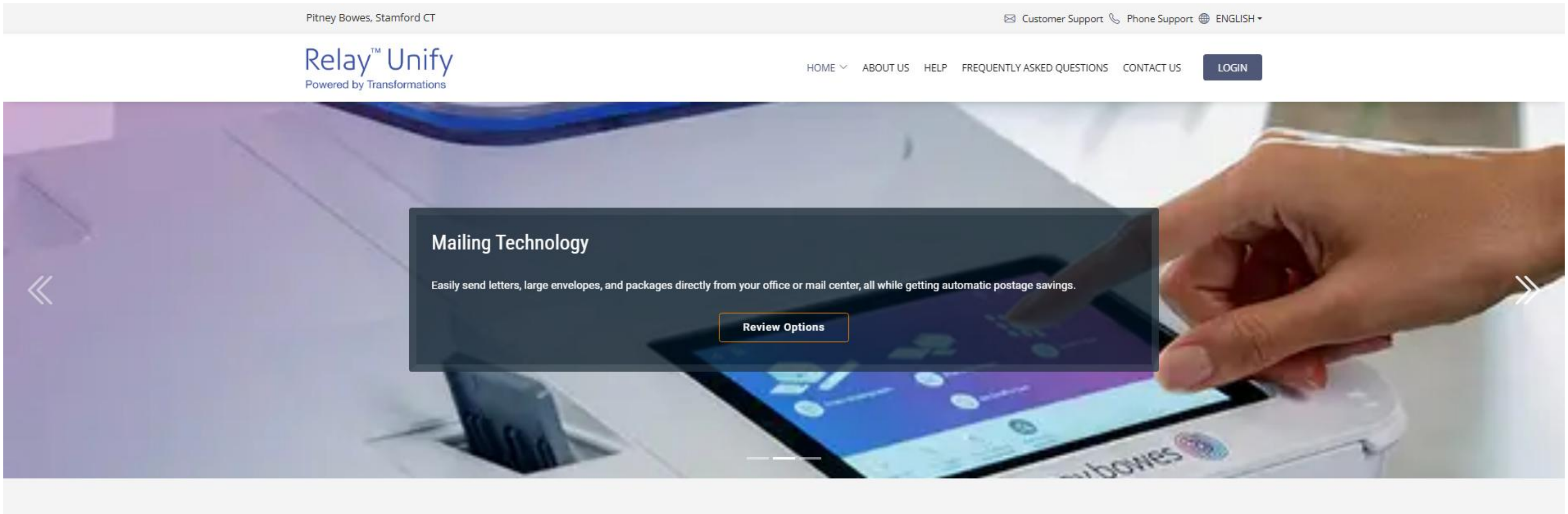


Support Call Text Display – This will the be the text that is displayed as a link on the right hand side of the website to contact the customer via phone.

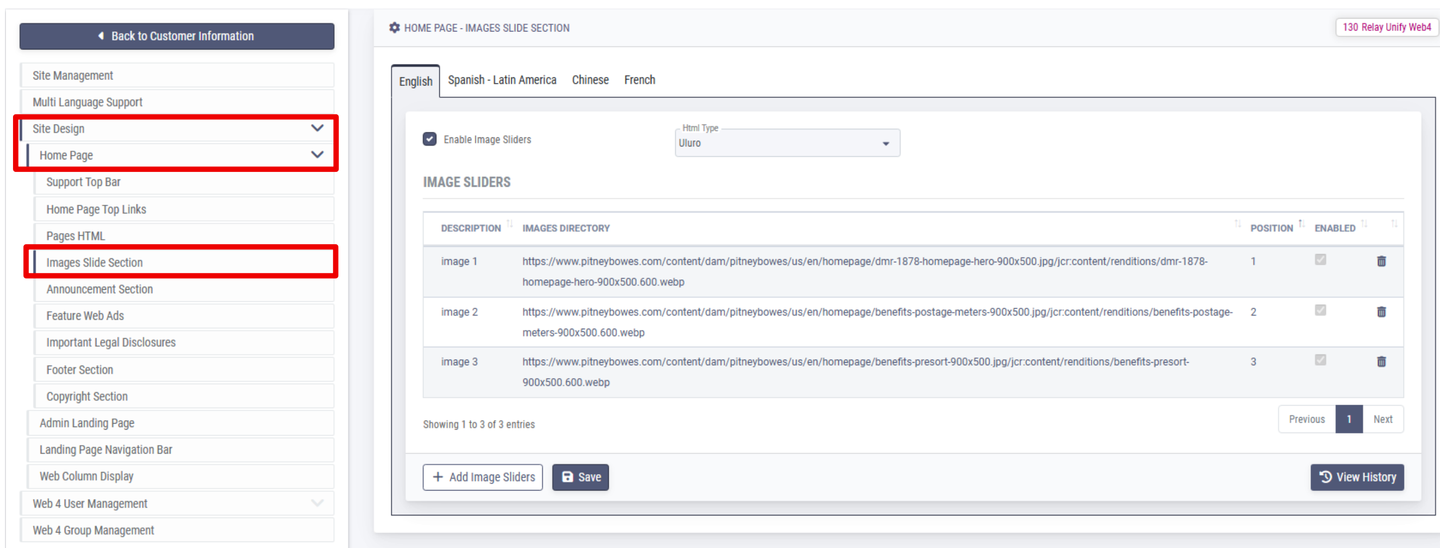
Phone Number – This is the phone number that is linked to the text displayed on the website.

Images Slide Section

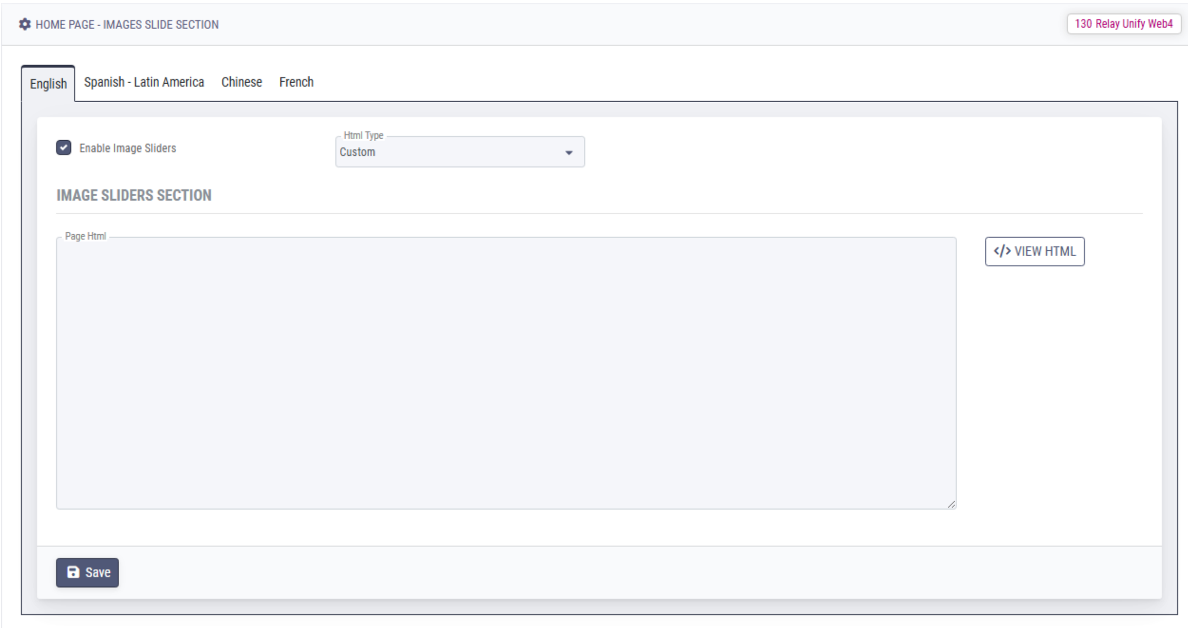
Along the left side, select Home Page. Then click the Images Slide Section tab. This is where the images on the main site are customized, and change on the home page of the website.



Enable Image Sliders – Check this box to turn the sliders on the website on.



HTML Type – This is a dropdown selection for either Relay Unify or Custom. Relay Unify is a template for the slides. Custom is HTML coding capable and has its own editor view that you can work with.



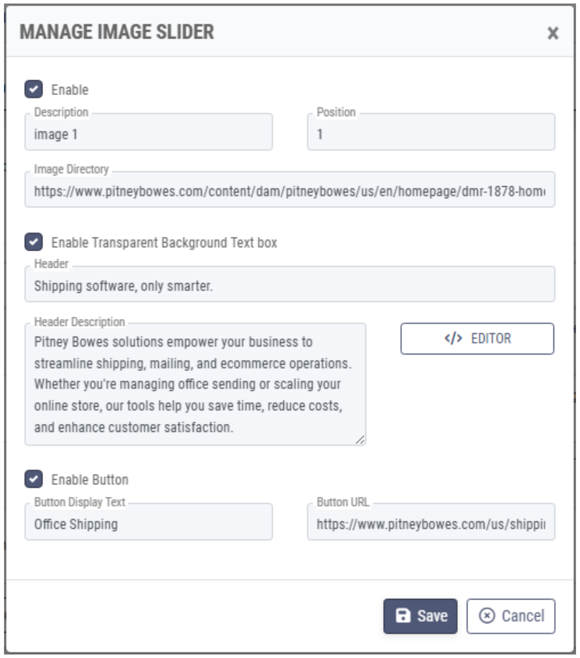
+ Add Image Sliders – Click this button to get a new image started.

Enable – Check this box to turn on this image on the slider section for the website.

Description – This is the human readable name that will be viewed on uSetup Web.

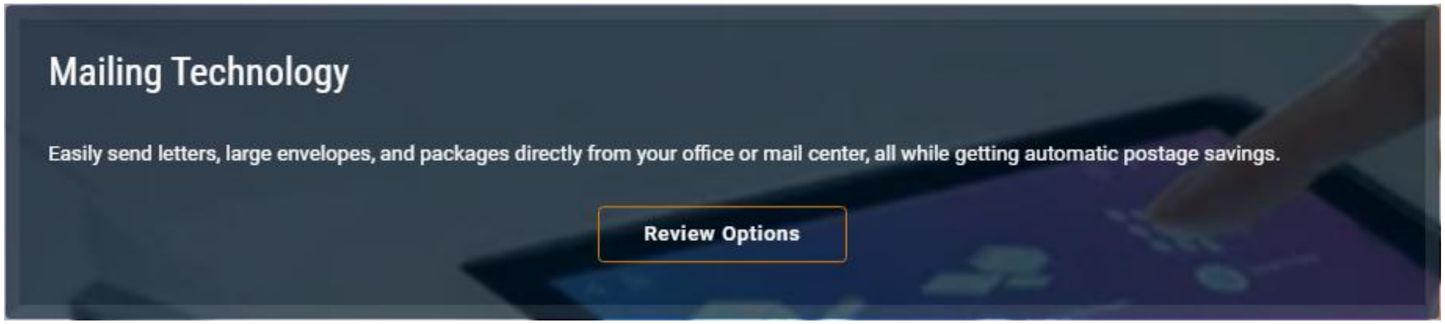
Position – This will determine where the image will be on the ticker at the bottom of the image slider on your website. You can put a numerical digit in or use the wheel on the side of the text box.

Image Directory – This is the UNC path from your local drive that has been set up for you. You only need the last couple folders and the image and extension for it to pick up your photos. (I.E. E:\Program Files (x86)\Transformations, Inc\Relay Unify Web4\Web4\wwwroot\exp-import\Images\exampleimage.jpg). You would only need to use (exp-import\Images\) and it will pick up the image you'd like to use in this section.

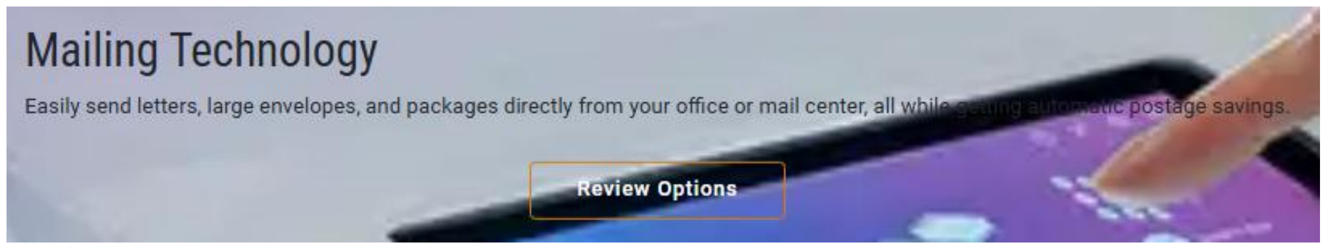


Enable Transparent Background Text Box – Checking this box will put a box around the text you enter in the Header/ Header Description below that will keep it centered in the image that it has been added to.

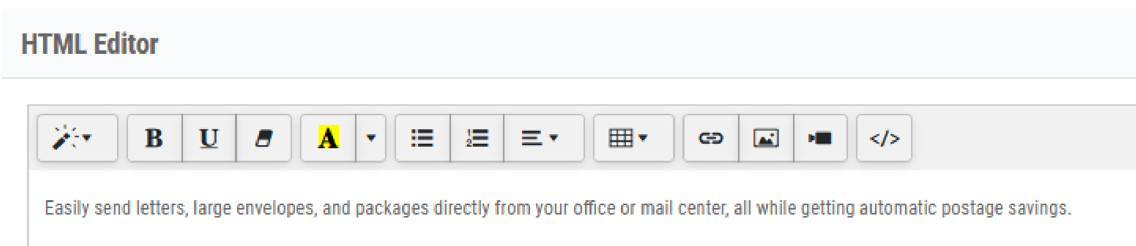
Header – This is the text that will be displayed in the top left corner of your box (if used), or centered left side of your image if the transparent background text box is not used.



Header Description – This is the text that would be displayed in the body of your transparent background text box (if being used), or centered in the image slider that it's being used on.



</> Editor – Click on this button to pull up the HTML editor and customize the body of your Header Description.



Enable Button – Check this box to enable a button at the bottom of the text box on the image that it is being used on.

Button Display Text – Enter the text that you would like displayed in a button underneath the body of the header description in the transparent background text box.

Button URL – You have the ability to link an external web URL to the button added to the image slider. If no URL is needed, you can leave this box blank or put a # in the box and it will keep you on the home page of the customer website.

Tips:

The Relay Unify images are on your server from the install for you to reference.

You can use these images for your ads to begin with before customizing them.

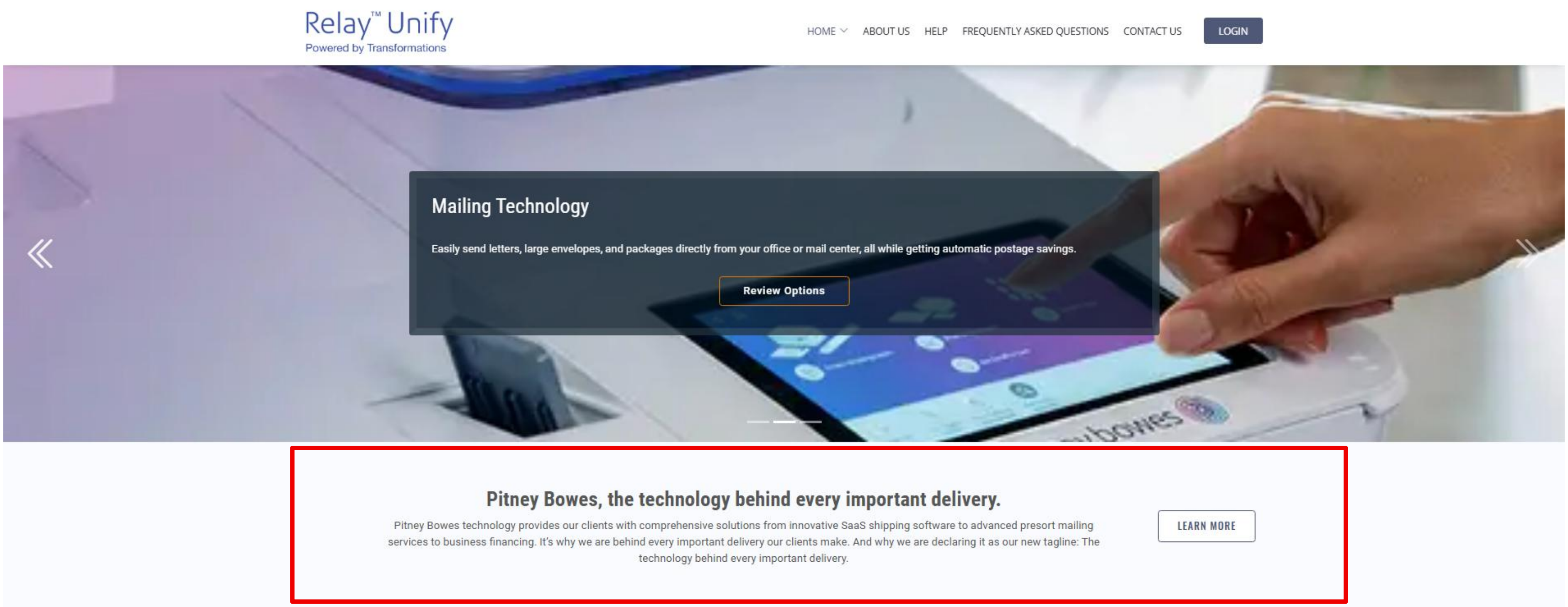
To keep your ads uniform, try to get images relatively similar in size.

Size does not matter for location in Web4.

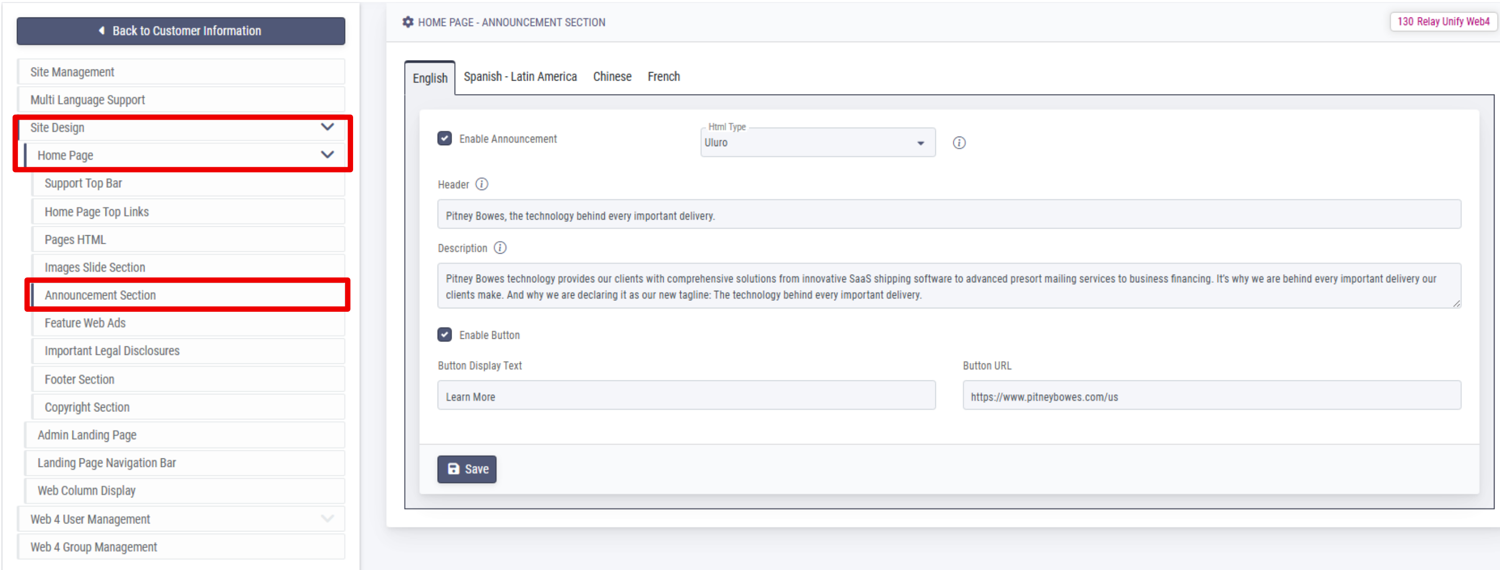
featuresection.png	5/20/2025 7:46 AM	PNG File	237 KB
h1.jpg	5/20/2025 7:46 AM	IrfanView JPG F...	1,348 KB
h2.jpeg	5/20/2025 7:46 AM	JPEG image	2,494 KB
h3.jpeg	10/9/2016 10:38 AM	JPEG image	4,420 KB
logo.png	5/20/2025 7:46 AM	PNG File	6 KB
spanish01.jpeg	9/3/2015 8:24 PM	JPEG image	3,845 KB
spanish02.jpeg	6/24/2013 2:51 PM	JPEG image	8,558 KB
spanish03.jpeg	12/7/2015 8:11 PM	JPEG image	4,240 KB

Announcement Section

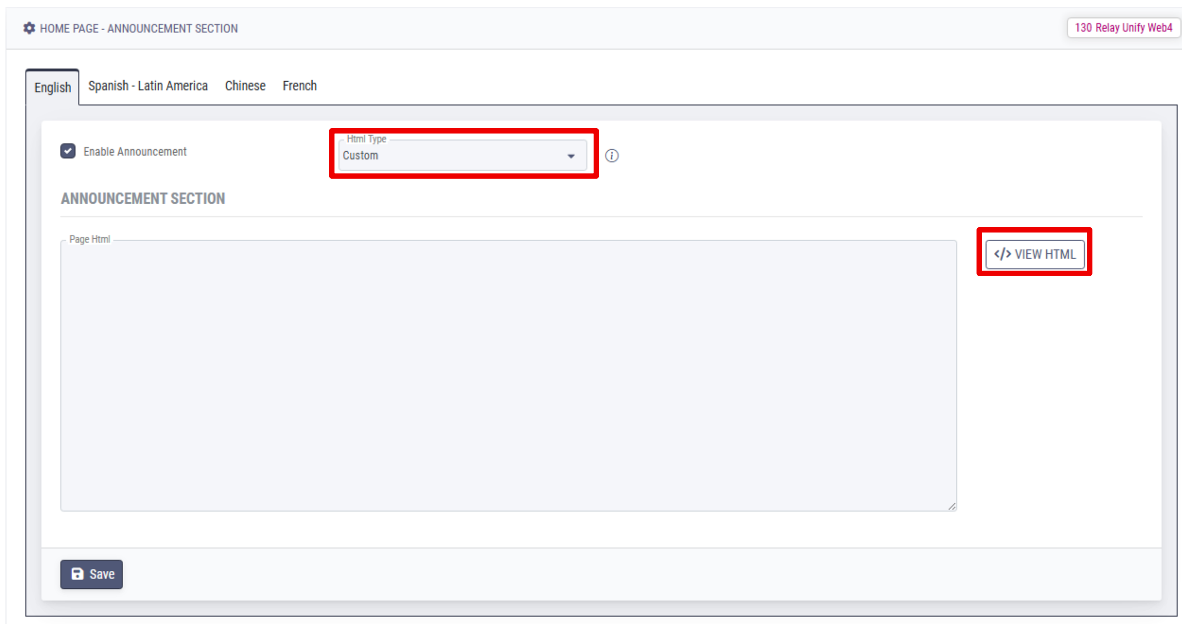
Along the left side, select Home Page. Then click the Announcement Section tab. This is where you can set an HTML coded announcement in the center of your customers web portal that can boast what the customers company can do for the end user or other businesses.



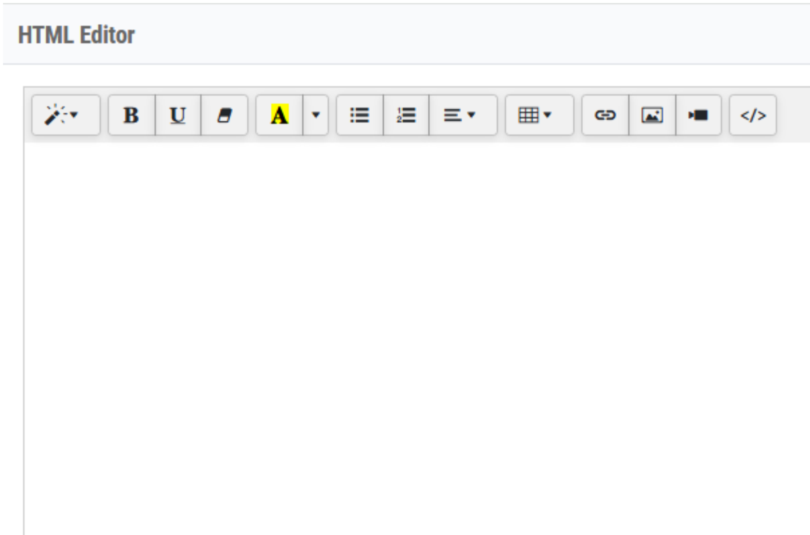
Enable Announcement – Check this box to turn the Announcement Section on the website on.



HTML Type – This is a dropdown selection for either Relay Unify or Custom. Relay Unify is a template for the Announcement Section. Custom is HTML coding capable and has its own editor view that you can work with.



</> View HTML – Click on this button under the Custom HTML Type dropdown to see the HTML editor.



Header – This is the text that will be displayed in the centered of the website in the Announcement Section and will be entered in bold. You can also do basic HTML coding in this section to enhance it.

Description – This is the text that you will enter as the body of the Announcement Section for the web portal.

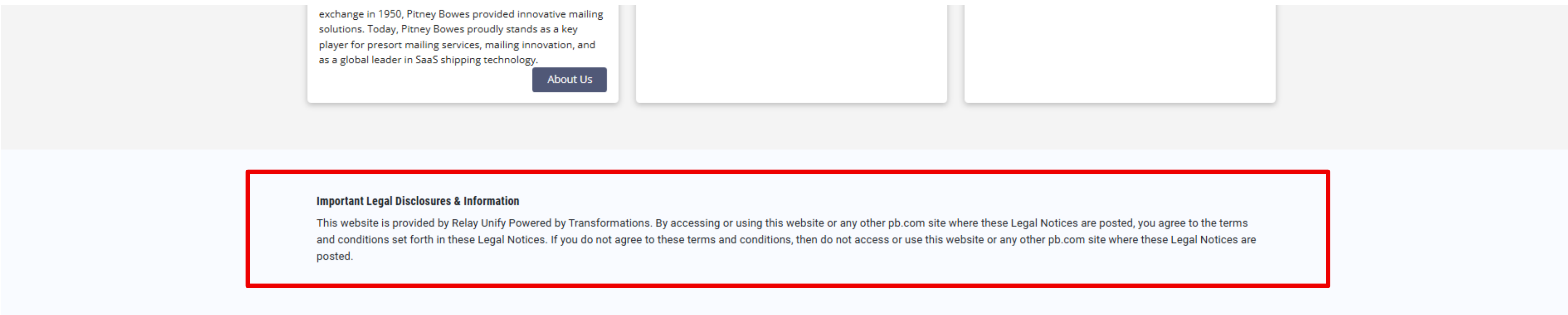
Enable Button – Checking this box will add a button to the right hand side of the Announcement Section. You can disable this button and it will not appear in the Announcement Section, but if you have it enabled and the Announcement Section disabled, the button will also not be visible.

Button Display Text – This is the text that would be displayed in the button if you have it enabled.

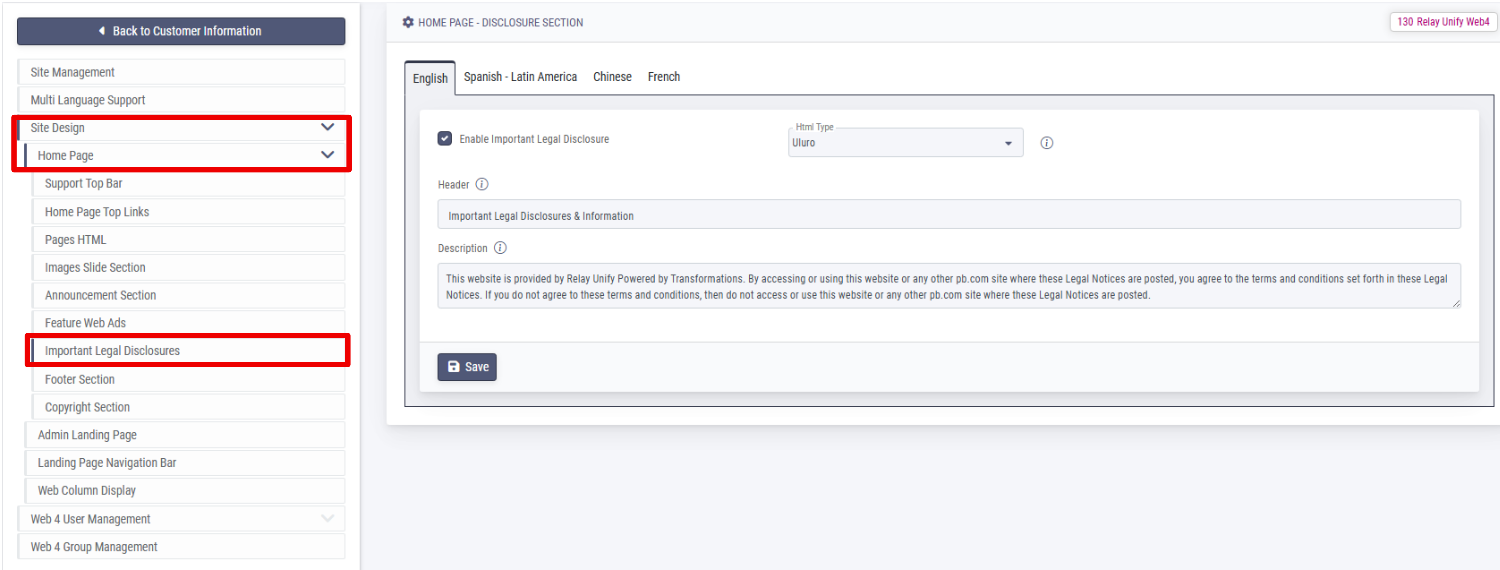
Button URL – You can add an external web URL to guide your end users to another webpage by entering a URL in this box. If no URL is required, you can leave this box blank, or you can enter a character here to keep the link null.

Important Legal Disclosures

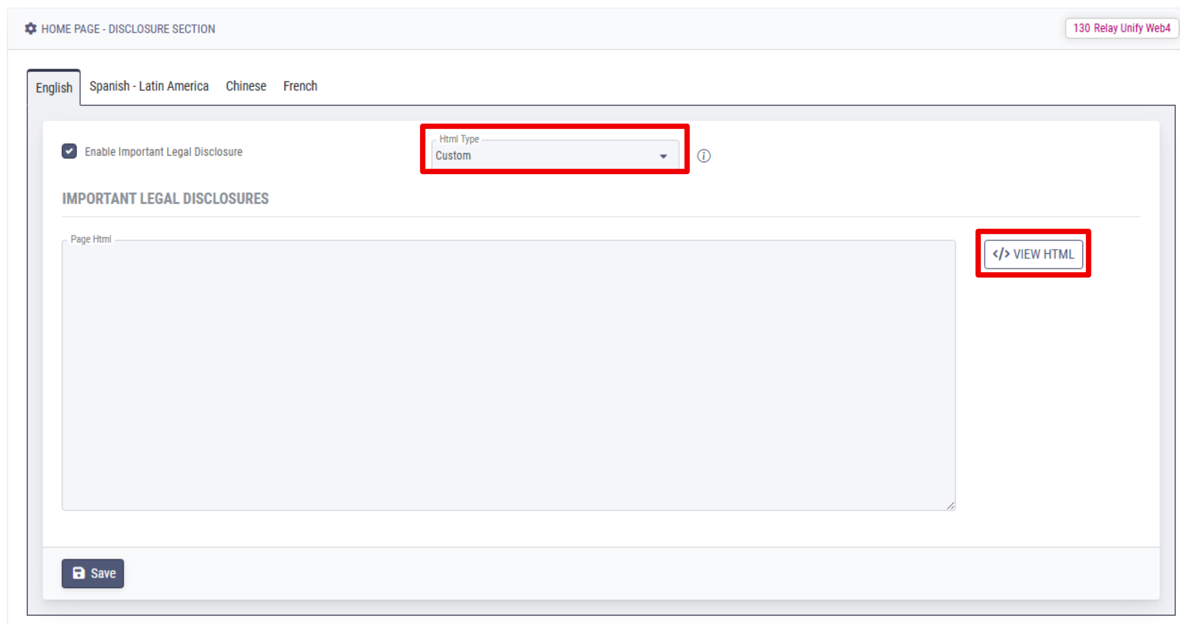
Along the left side, select Home Page. Then click the Important Legal Disclosures tab. This is where you can enter an Important Legal Disclosure about the customers website that you're building.



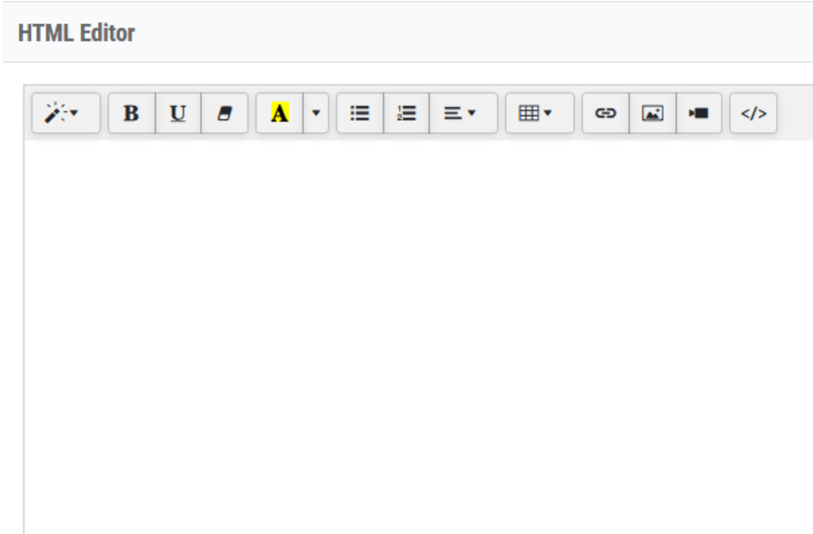
Enable Important Legal Disclosure – Check this box to turn the Important Legal Disclosure for the website on.



HTML Type – This is a dropdown selection for either Relay Unify or Custom. Relay Unify is a template for the Important Legal Disclosure Section. Custom is HTML coding capable and has its own editor view that you can work with.



</> View HTML – Click on this button under the Custom HTML Type dropdown to see the HTML editor.

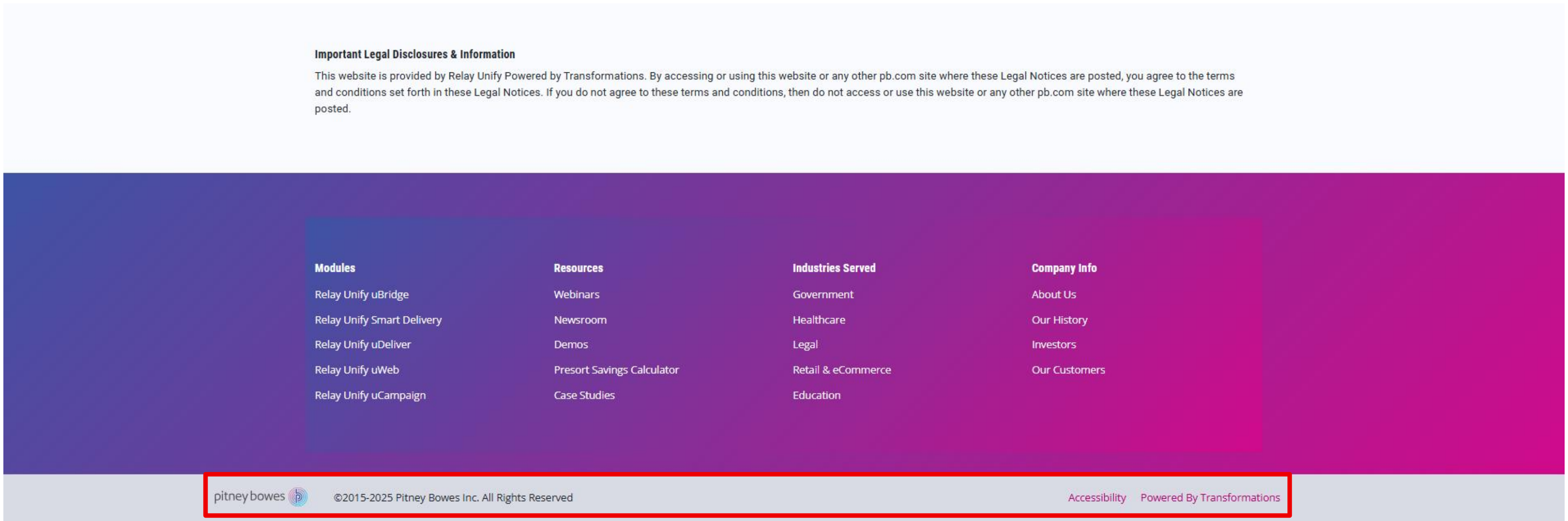


Header – This is the text that will be displayed on the left of the Important Legal Disclosures Section on the lower section of the website you are building, and will be displayed in bold.

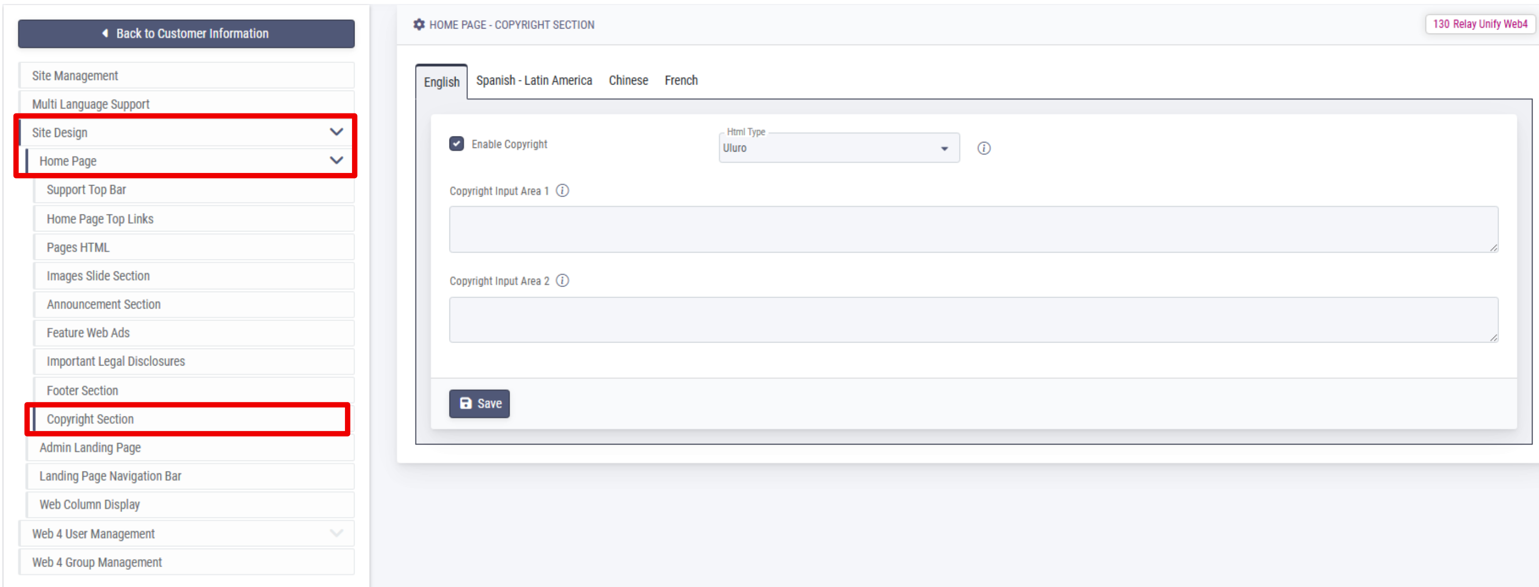
Description – This is the text that you will enter as the body of the Important Legal Disclosures Section for the web portal.

Copyright Section

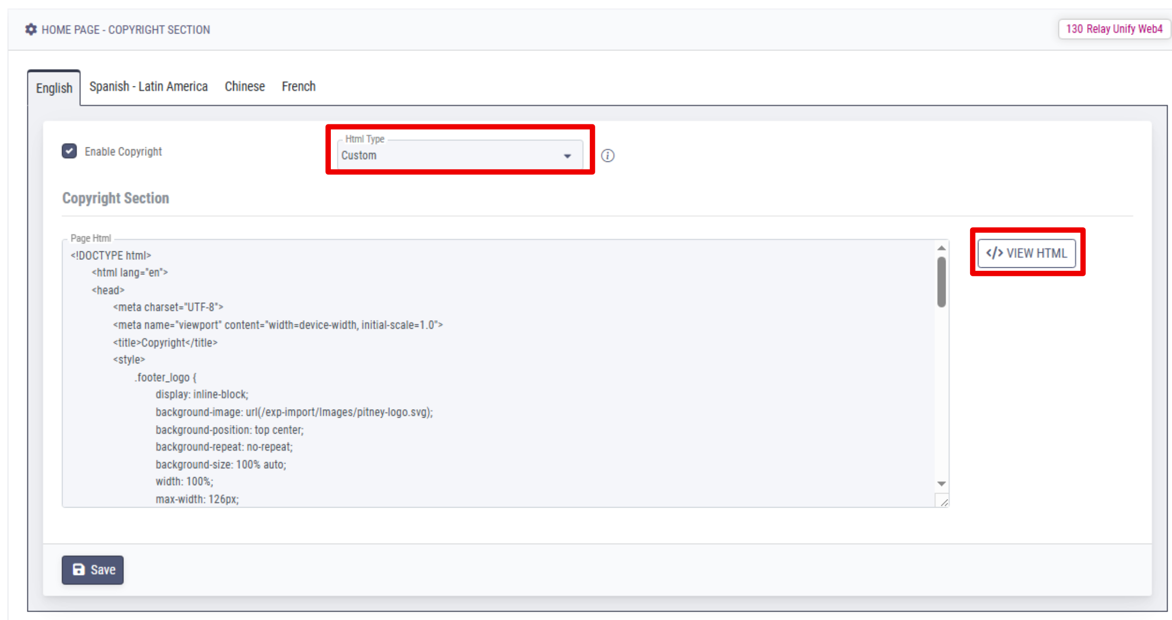
Along the left side, select Home Page. Then click the Copyright Section tab. This is where you can enter Copyright information about the customers website that you're building across the bottom of the page.



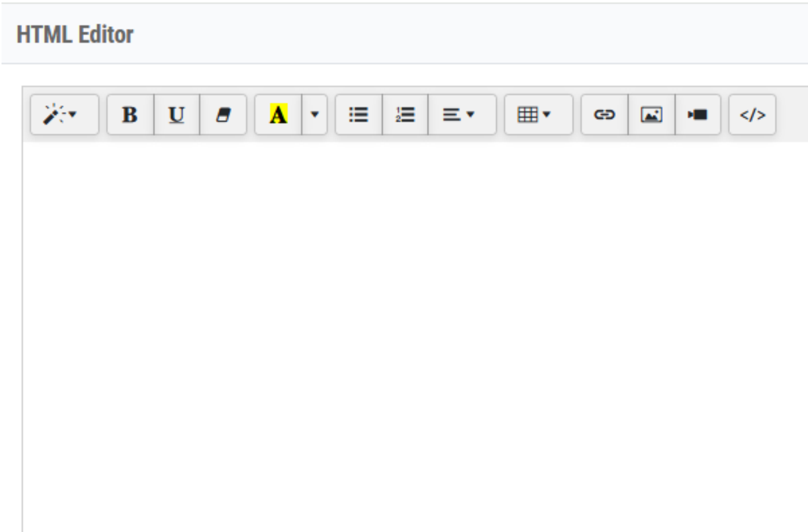
Enable Copyright – Check this box to turn the Copyright Section for the website on.



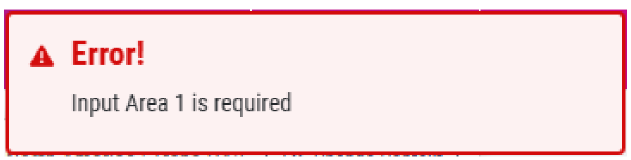
HTML Type – This is a dropdown selection for either Relay Unify or Custom. Relay Unify is a template for the Copyright Section. Custom is HTML coding capable and has its own editor view that you can work with.



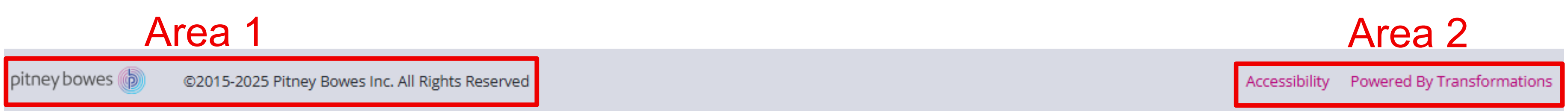
</> View HTML – Click on this button under the Custom HTML Type dropdown to see the HTML editor.



Copyright Input Area 1 – This is the text that will be displayed on the left side of the Copyright Section on the bottom section of the website you are building. If the Copyright Section is enabled, both areas 1 and 2 must have text entered, or the Copyright Section cannot be saved.

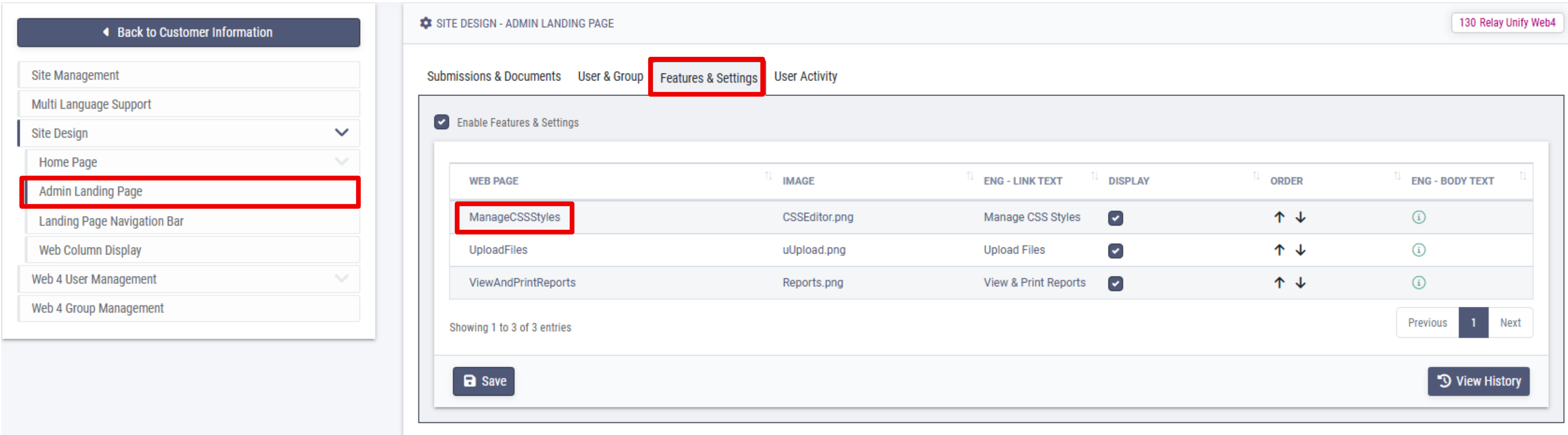


Copyright Input Area 2 – This is the text that will be displayed on the right side of the Copyright Section on the bottom section of the website you are building. You can enter a web address in one of these two areas as a link.



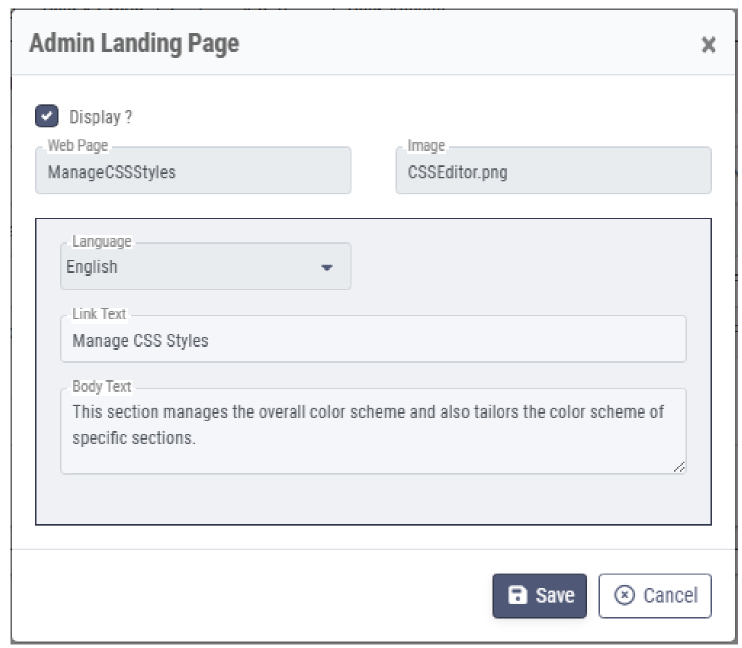
CSS Editor

The CSS Editor is now on the web portal itself. In order to set up the CSS Editor, you have options to edit the text and the ability to turn on and off the editor on the admin landing page. When logged in on the admin landing page, you have the ability to edit and use the CSS Editor and see the samples as you move along through the different tabs on the left-hand side. The Web CSS is applied to the web portal.

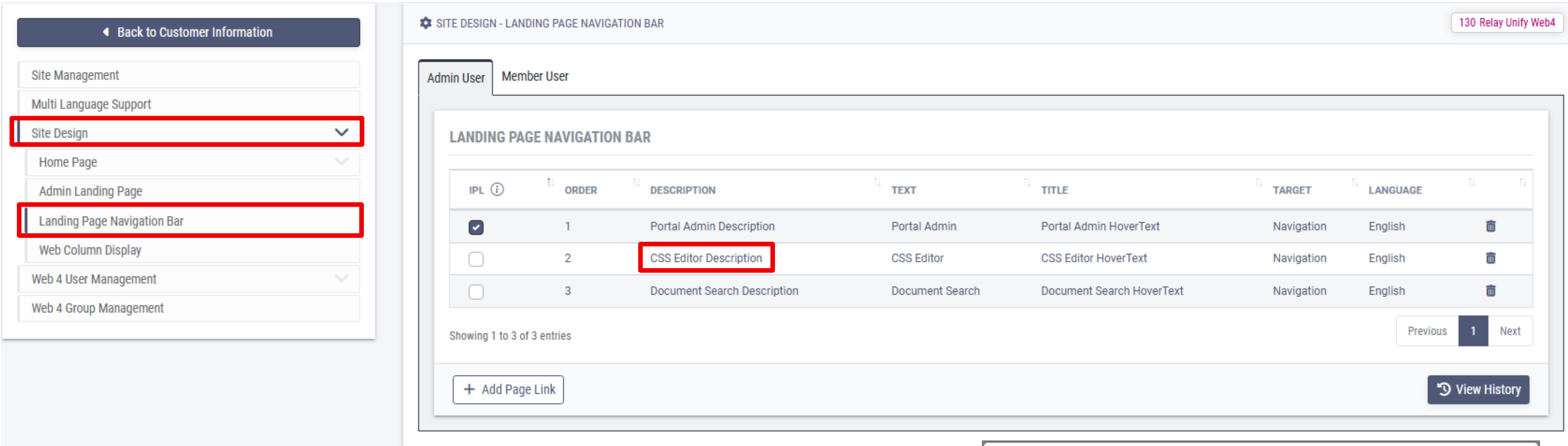


Set Up:

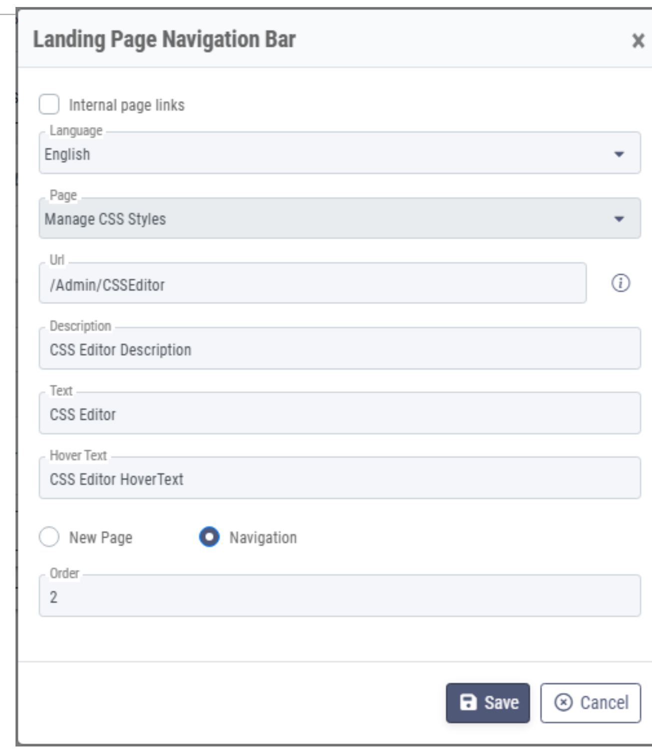
Navigate to the Features & Settings Tab under the Admin Landing Page Tab on the left-hand side. Here you can choose to display this tab on the web portal, and also change the image and the text for the tab.



After editing your image and/or text for the CSS on the Admin Landing Page Tab, you can also navigate to the Landing Page Navigation Bar Tab to turn on or off the CSS Editor link at the top of the Admin Landing Page.



On the Landing Page Navigation Bar, if you click on one of the columns you can edit the functions of that selection.



+ Add Page Link – Click on this button to add additional links at the top of your admin landing page.

Internal page links – Check this box to turn on the page dropdown and choose from pages native to the Relay Unify Web4 portal.

Page – Select from a number of internal pages to navigate to from the dropdown menu if the Internal page links checkbox has been checked.

URL – If the Internal page links checkbox is not checked, you have the ability to set an external web page for your link on your admin landing page.

Description – This is the visual description of what the link is titled on your uSetup Web.

Text – This is the text that will show up on your admin landing page navigation bar for quick access to your editor.

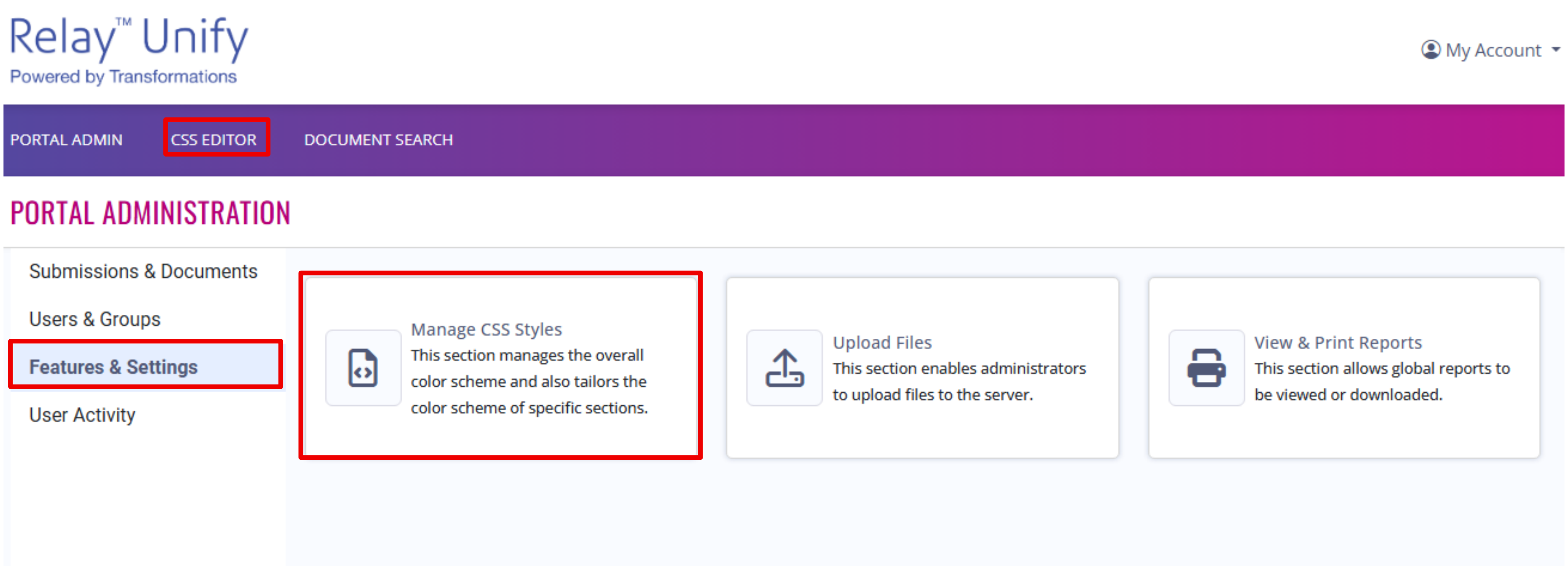
Hover Text – This is the text that will show up on the link when you hover your cursor over it.

New Page/Navigation – Select one of these radio buttons to either stay in the same tab when Navigating, or to open a New Page when the link is clicked.

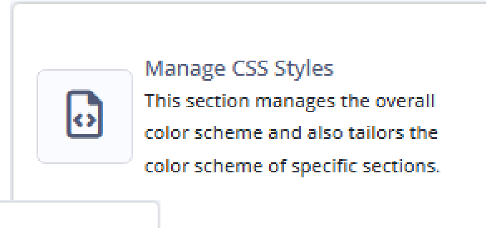
Order – This is the order in which your links will be displayed in your navigation bar on the admin landing page. These are from left to right.

Editor

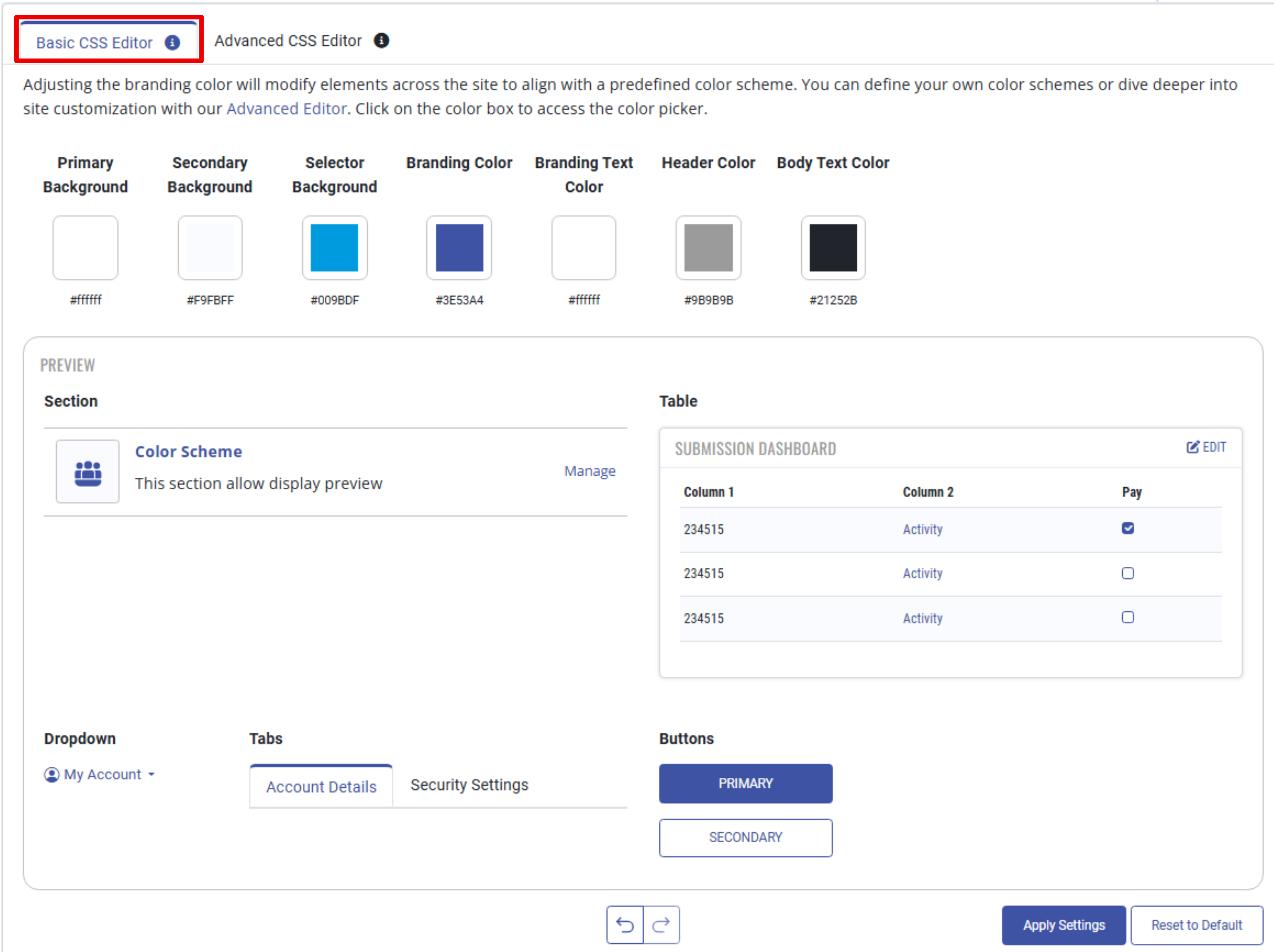
Now that you've enabled and set up your CSS editor, you can go into your web portal as an admin and begin to use the CSS Editor for Web4.



You can either get to the CSS Editor screen by clicking on the link you set up at the top of the Admin Navigation Bar, or by going to the “Features & Settings” tab on the left and clicking on “Manage CSS Styles” option to open the editor.



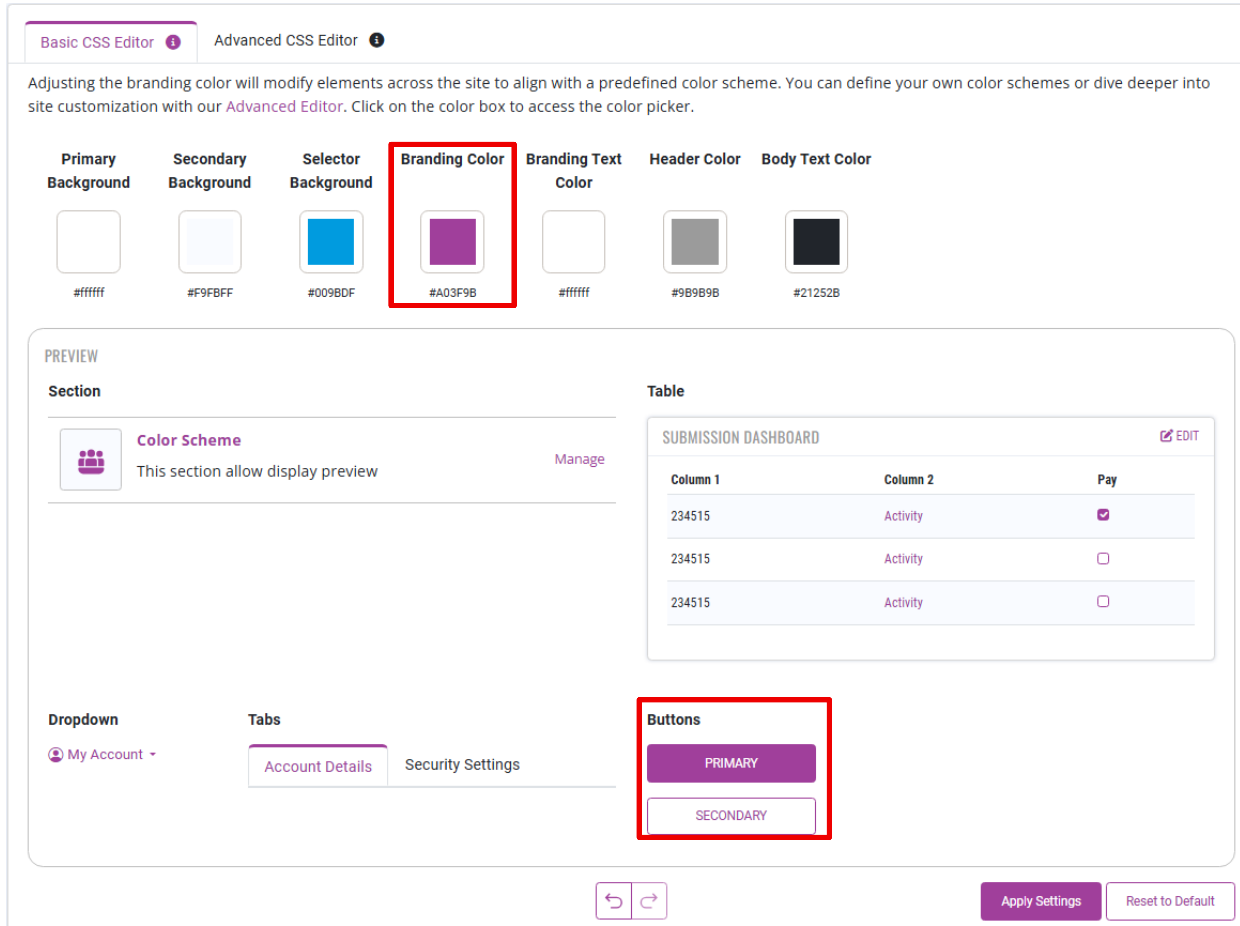
Basic CSS Editor Tab



When you open the editor, you will land on the Basic CSS Editor tab. You can easily navigate the page and make your necessary edits and see the previews as you proceed without the need for a CSS File.

Tips:

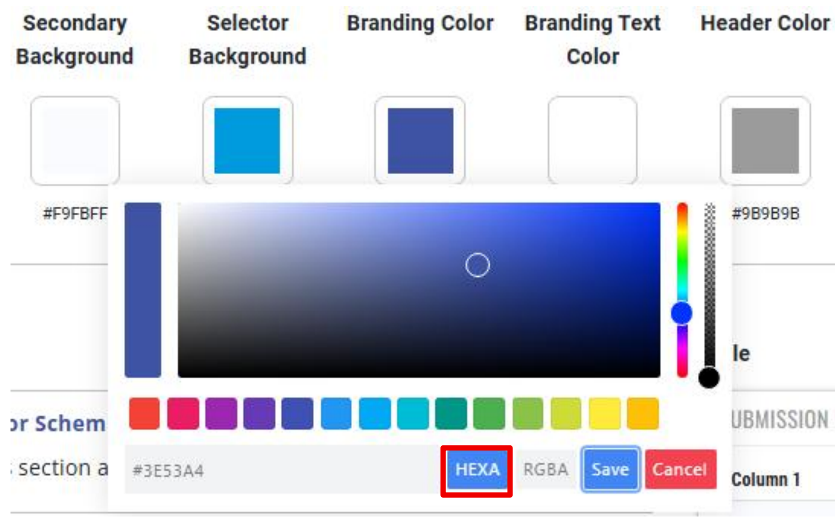
When editing your CSS, all you need to do is make your changes and click on the “Apply Settings” button to lock in those changes. If you wanted to set everything back to stock, click on the “Reset to Default” button. This is all done without having to load in a CSS file now.



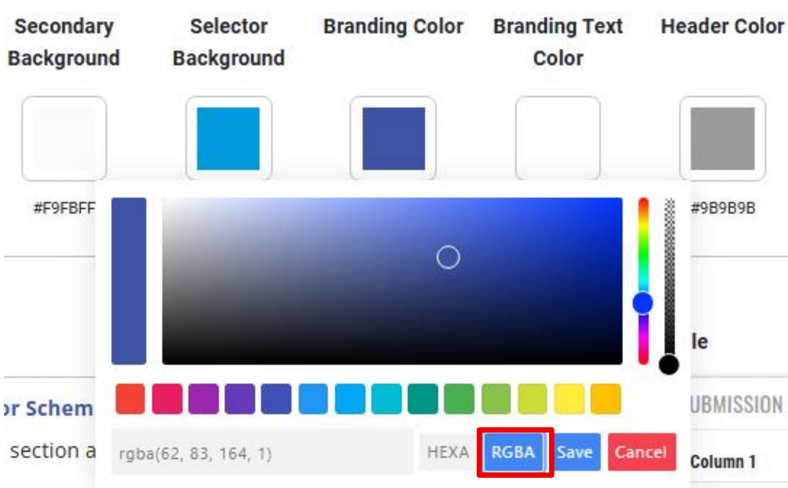
To edit the color of a background or font for the Main Page/Defaults, click the colored icon under the section that you wish to change. The font, background, hover, or gradient color you choose will be displayed in the square below, along with the HEX Value.

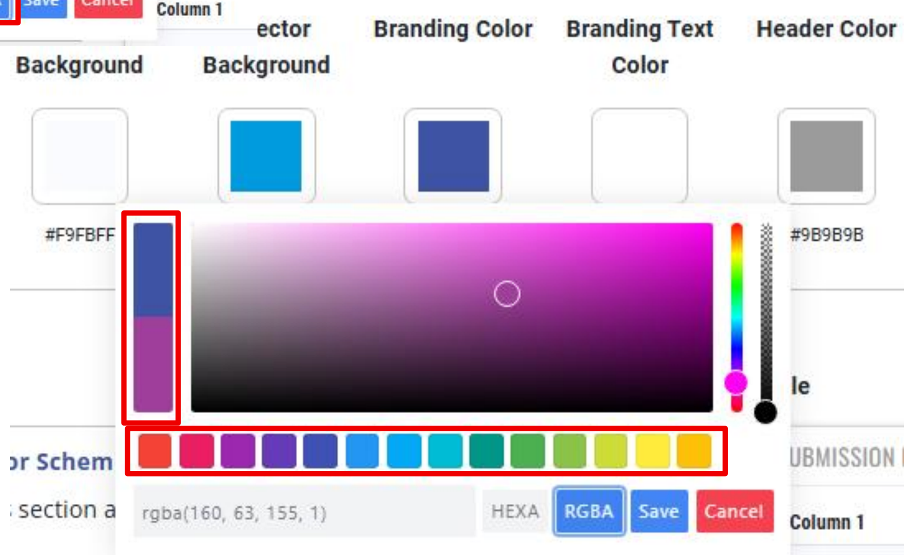
Edit the colors by entering the Hex value or click the color square to adjust the color using the RGB values or by dragging the arrows along the axis.

The predefined colors allow you to select from some of the default colors under the selector.



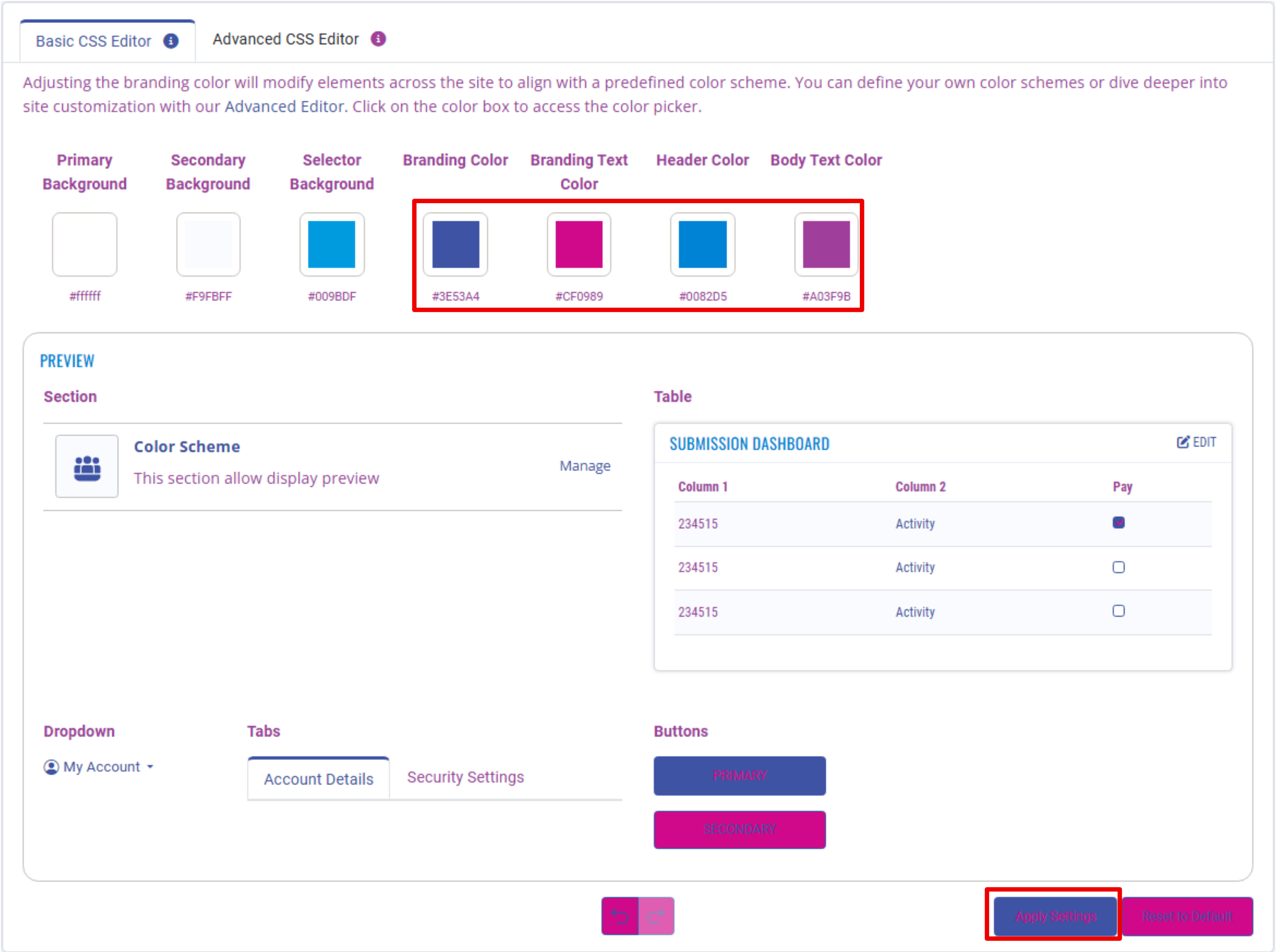
The old and new color are shown so that you can compare the color change.





The predefined colors list is stock on the system when installed.

Once a new color is selected, click on the Apply Settings button for as many of the items you wish to now be the colors in the section across the top. You will see the color/s updated.



The color of the buttons are edited the same way that the Backgroud colors are edited. Click on the color square you'd like to change, and choose your new color. Edit the color and click Apply Settings for the changes to take effect.

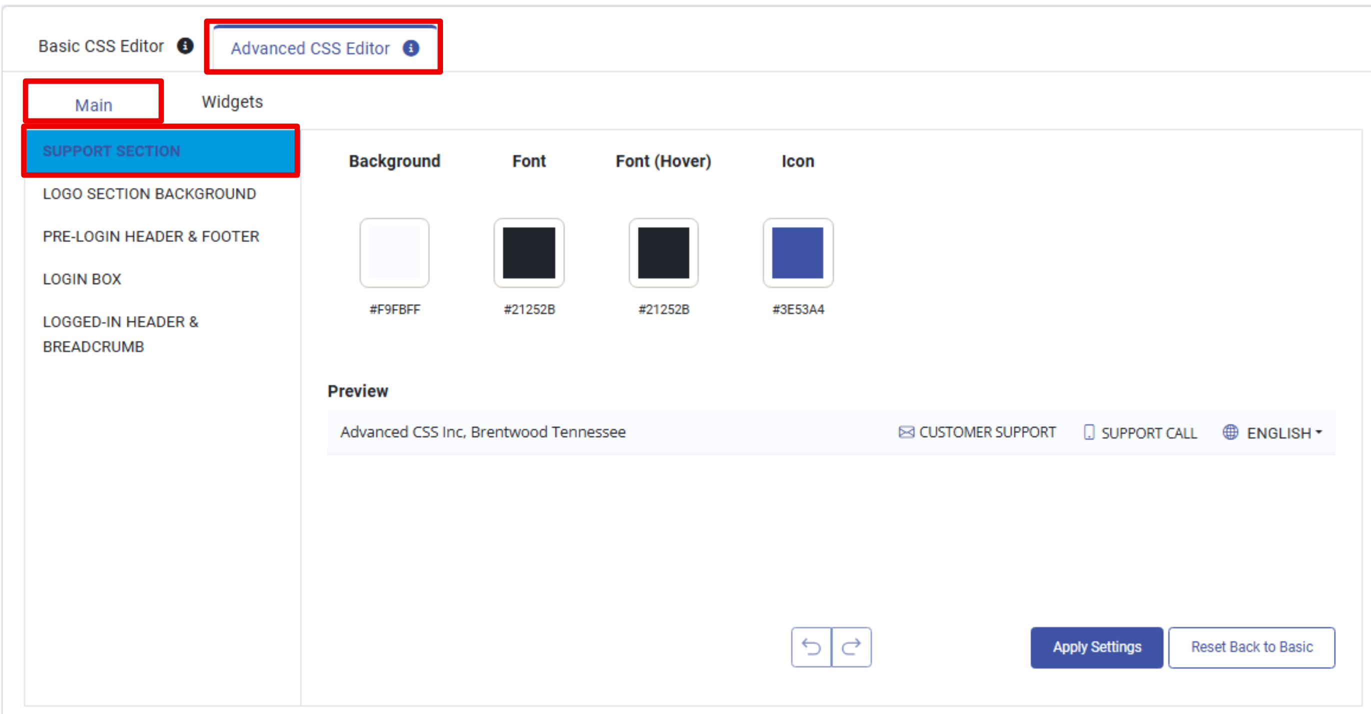
Once you've clicked on the Apply Settings button, it will save the new color scheme for you and give you a notice that your changes have been saved successfully.

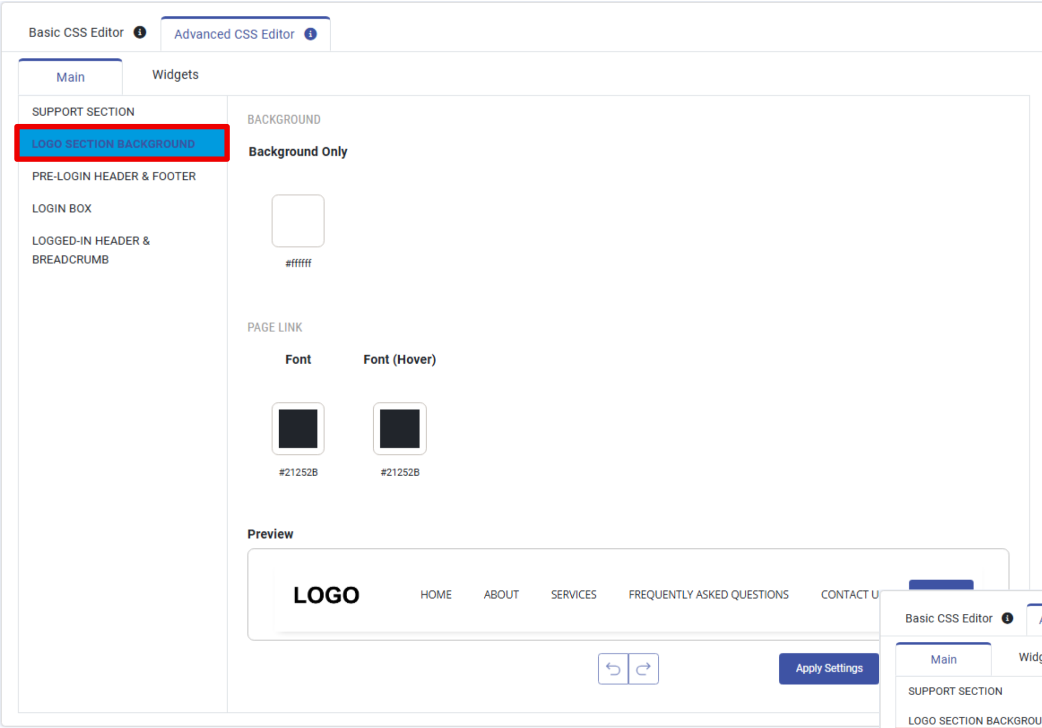
Advanced CSS Editor

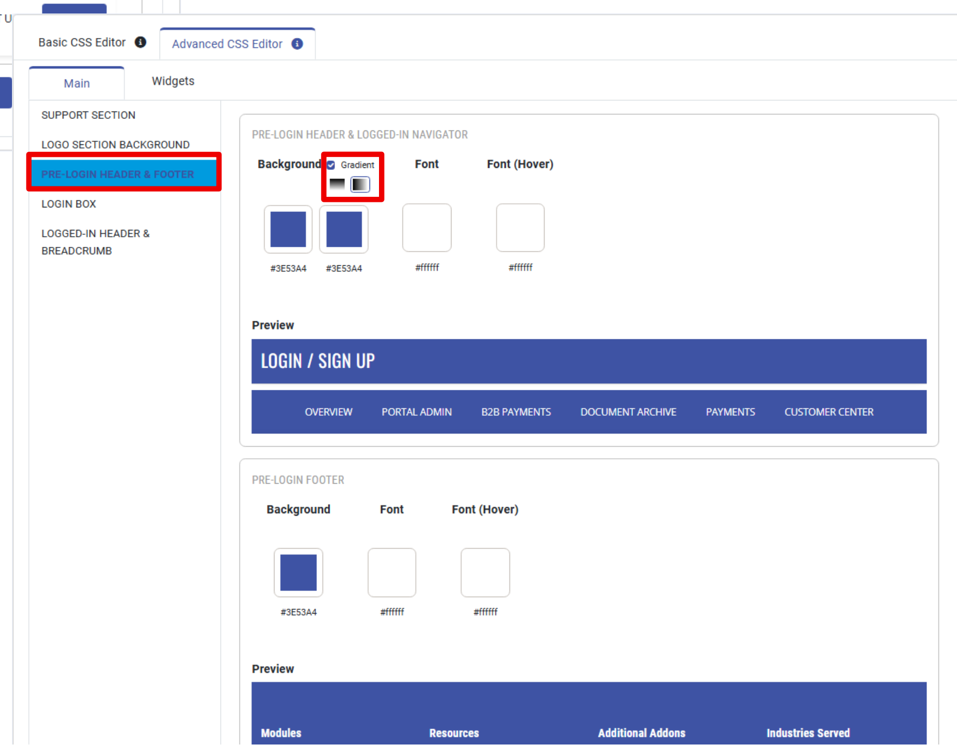
The advanced editor is available as soon as you open up the CSS Editor. This is just as simple to use as the Basic CSS Editor Tab.

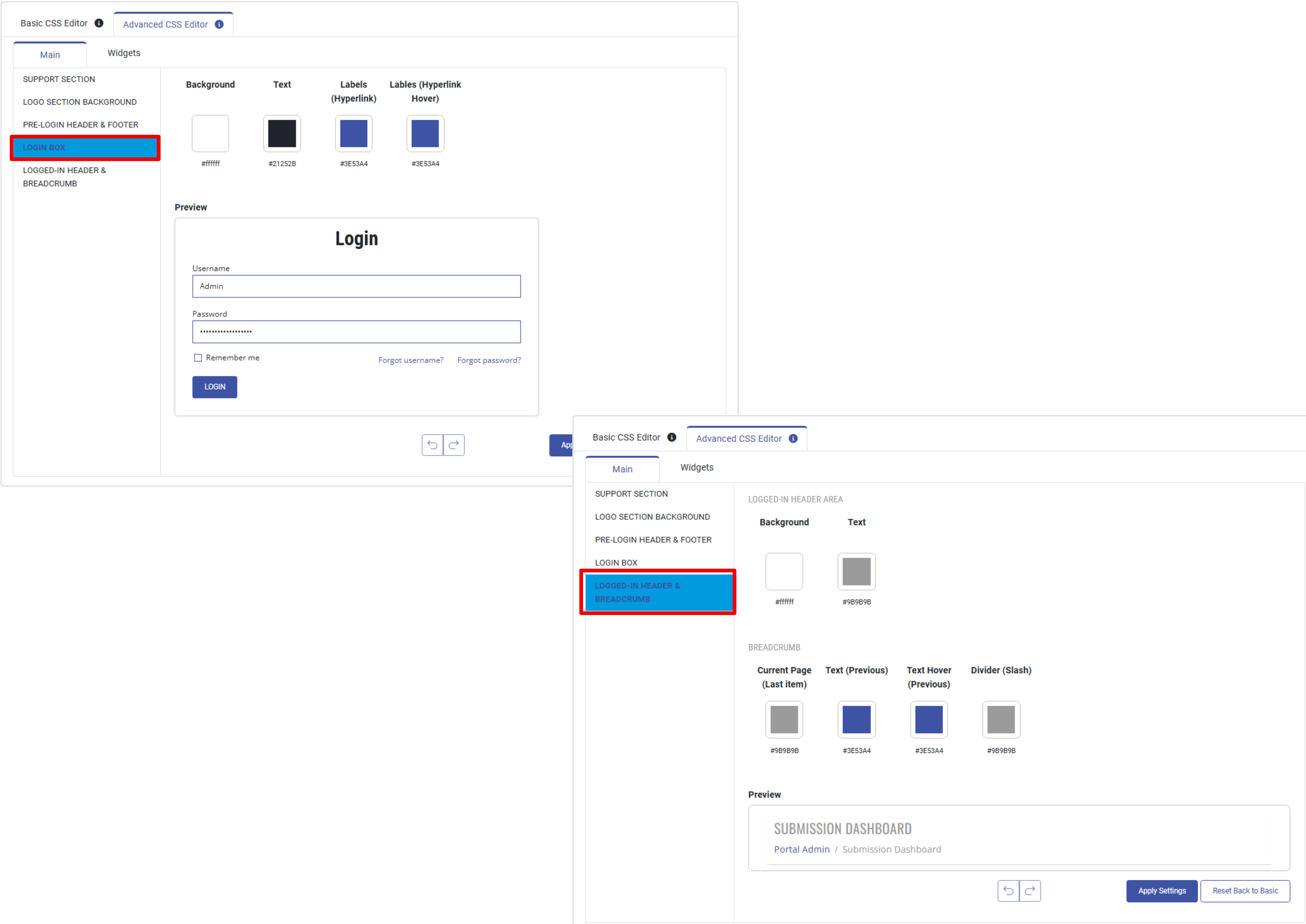
Main Section

In the Main Section of the Advanced CSS Editor tab, you have the ability to change 5 different areas of your web portal. Support Section, Logo Section Background, Pre-Login Header & Footer, Login Box, Logged-In Header & Breadcrumb Tabs. You still have your preview area underneath your color picker on each of the 5 different tabs. The Pre-Login Header & Footer Tab also has a gradient checkbox for you to add a gradient vertically or horizontally. Choosing colors and editing colors is just as easy as the Basic CSS Editor Tab.




Basic CSS Editor
Advanced CSS Editor
Main
Widgets
SUPPORT SECTION
LOGO SECTION BACKGROUND
PRE-LOGIN HEADER & FOOTER
LOGIN BOX
LOGGED-IN HEADER & BREADCRUMB
BACKGROUND
Background Only
#ffffff
PAGE LINK
Font
Font (Hover)
#21252B
#21252B
Preview
LOGO
HOME
ABOUT
SERVICES
FREQUENTLY ASKED QUESTIONS
Apply Settings


Basic CSS Editor
Advanced CSS Editor
Main
Widgets
SUPPORT SECTION
LOGO SECTION BACKGROUND
PRE-LOGIN HEADER & FOOTER
LOGIN BOX
LOGGED-IN HEADER & BREADCRUMB
PRE-LOGIN HEADER & LOGGED-IN NAVIGATOR
Background
Gradient
Font
Font (Hover)
#3E53A4
#3E53A4
#ffffff
#ffffff
Preview
LOGIN / SIGN UP
OVERVIEW
PORTAL ADMIN
B2B PAYMENTS
DOCUMENT ARCHIVE
PAYMENTS
CUSTOMER CENTER
PRE-LOGIN FOOTER
Background
Font
Font (Hover)
#3E53A4
#ffffff
#ffffff
Preview
Modules
Resources
Additional Addons
Industries Served


Basic CSS Editor
Advanced CSS Editor
Main
Widgets
SUPPORT SECTION
LOGO SECTION BACKGROUND
PRE-LOGIN HEADER & FOOTER
LOGIN BOX
LOGGED-IN HEADER & BREADCRUMB
Background
Text
Labels (Hyperlink)
Lables (Hyperlink Hover)
#ffffff
#21252B
#3E53A4
#3E53A4
Preview
Login
Username
Admin
Password
Remember me
Forgot username?
Forgot password?
LOGIN
Basic CSS Editor
Advanced CSS Editor
Main
Widgets
SUPPORT SECTION
LOGO SECTION BACKGROUND
PRE-LOGIN HEADER & FOOTER
LOGIN BOX
LOGGED-IN HEADER & BREADCRUMB
LOGGED-IN HEADER AREA
Background
Text
#ffffff
#9B9B9B
BREADCRUMB
Current Page (Last item)
Text (Previous)
Text Hover (Previous)
Divider (Slash)
#9B9B9B
#3E53A4
#3E53A4
#9B9B9B
Preview
SUBMISSION DASHBOARD
Portal Admin / Submission Dashboard
Apply Settings
Reset Back to Basic

Widgets Section

To use the Widgets Advanced CSS Editor, click on the Advanced CSS Editor Tab, and select the Widgets tab to access the 3 different dropdown tabs.

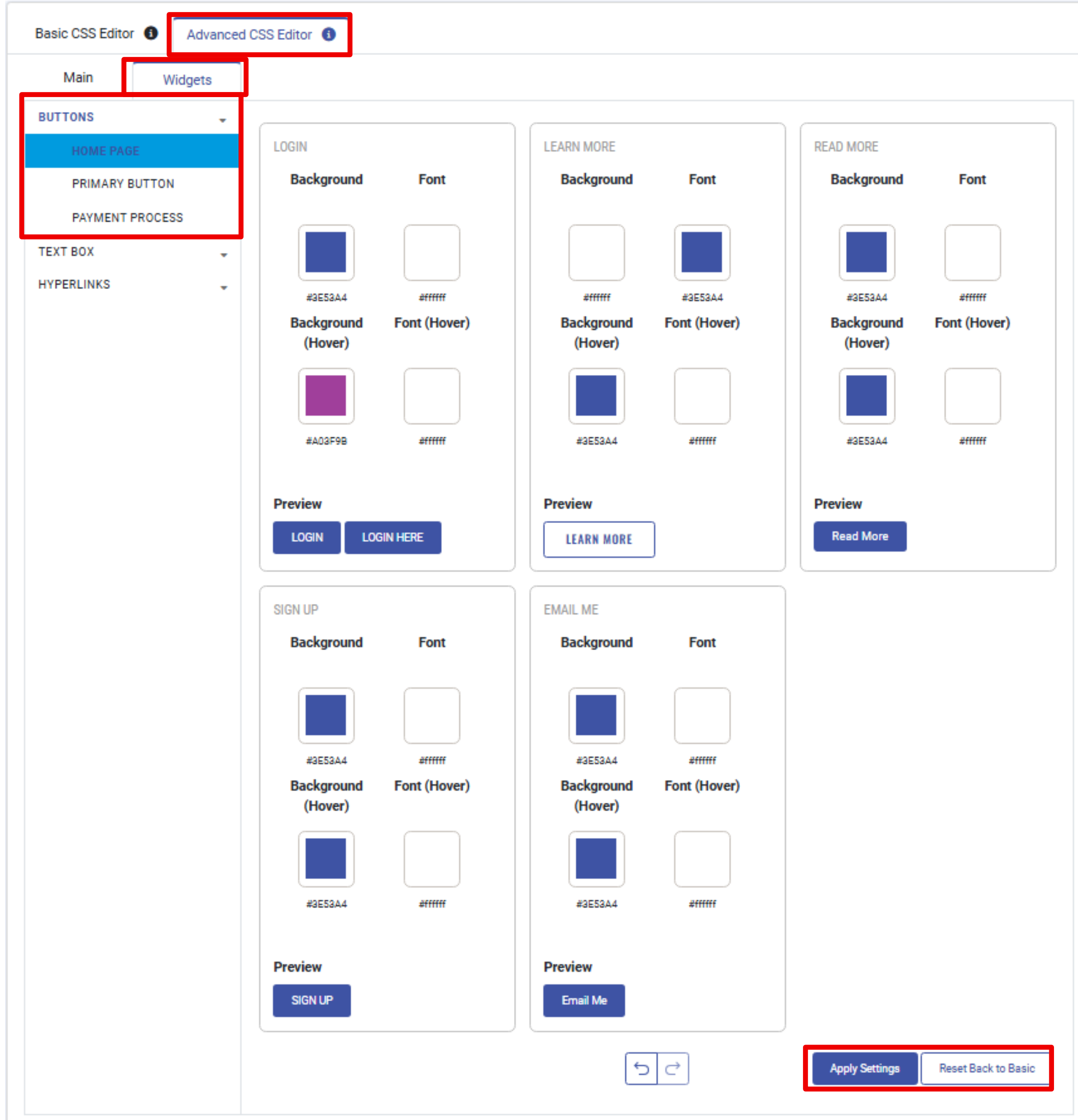
The first dropdown option is Buttons. Here you can edit 3 more areas of buttons on your web portal being Home Page, Primary Buttons, and Payment Process.

The second dropdown option is Text Box. Here you can edit 2 additional areas of text boxes being Input Box, and Information Box.

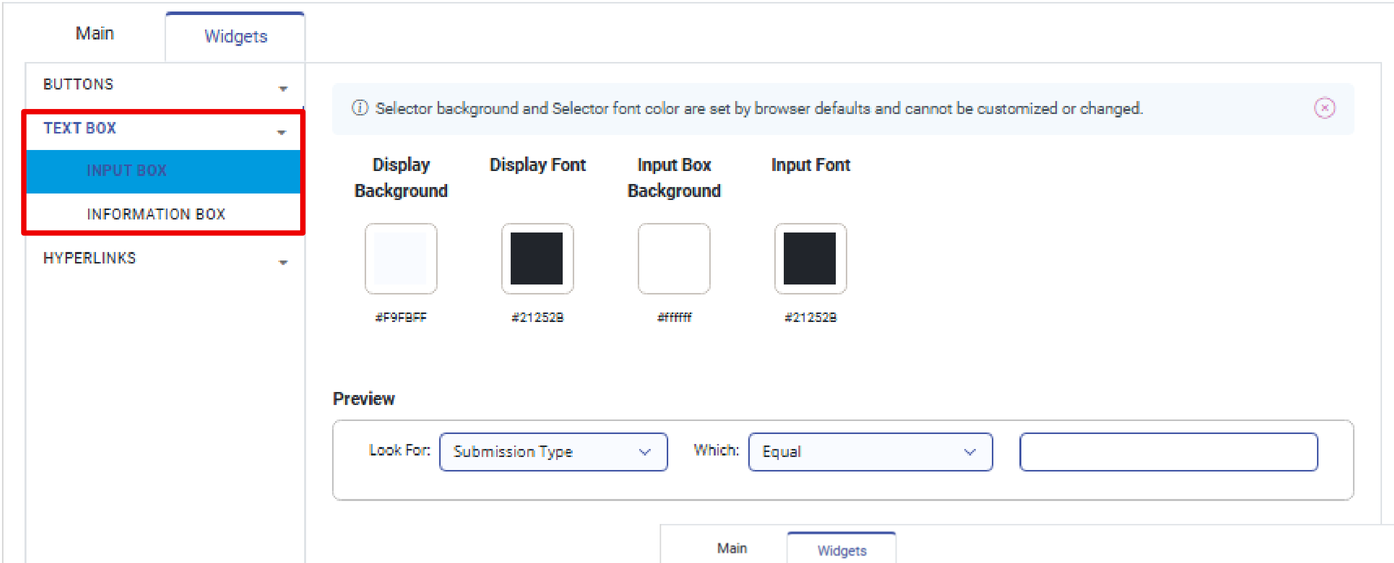
The third and final dropdown option is Hyperlinks. Here you can edit 3 additional areas of your web portal being End User Landing, Tables, and Dropdown: My Account/Options.

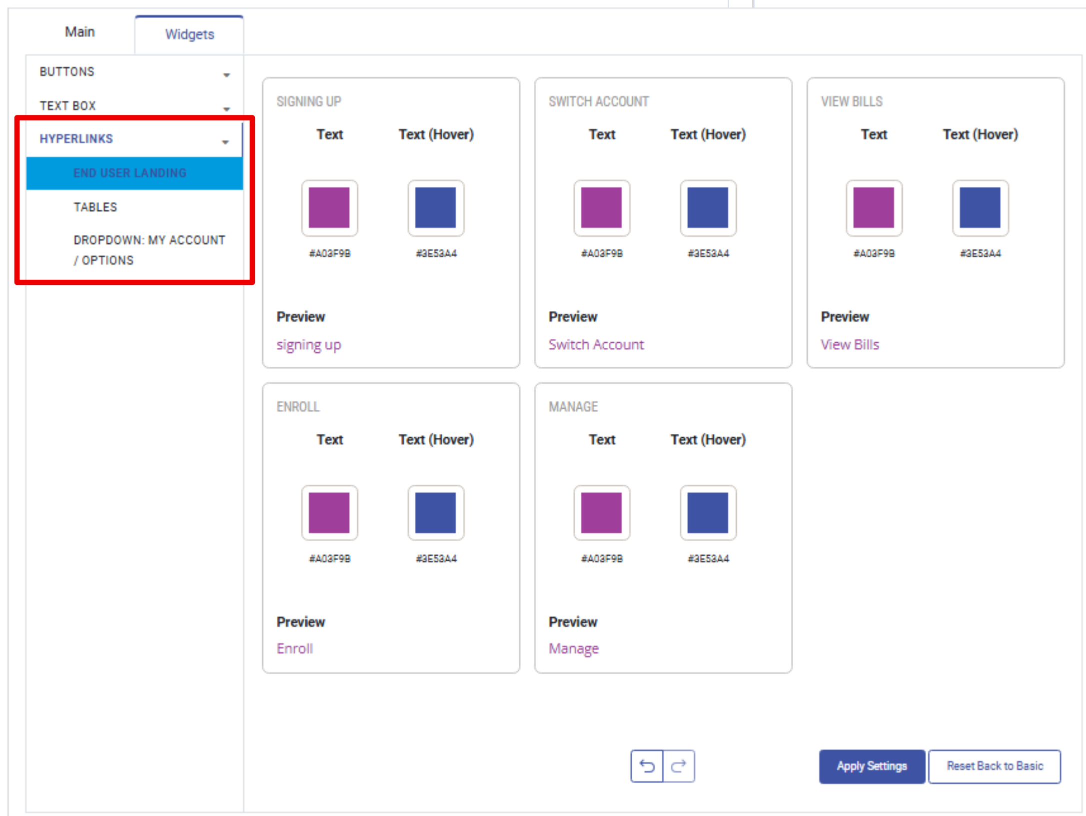
In the event that there is a gradient option, click on the checkbox to open it up and edit it accordingly for your web portal.

Once color changes have been made, click on the Apply Settings button just as you did within the Basic CSS Editor.



If you made some changes and didn't like the way they previewed, easily reset them back with the Reset Back to Basic button.


Main
Widgets
BUTTONS
TEXT BOX
INPUT BOX
INFORMATION BOX
HYPERLINKS
Selector background and Selector font color are set by browser defaults and cannot be customized or changed.
Display Background
Display Font
Input Box Background
Input Font
#F9FBFF
#21252B
#ffffff
#21252B
Preview
Look For:
Submission Type
Which:
Equal


Main
Widgets
BUTTONS
TEXT BOX
HYPERLINKS
END USER LANDING
TABLES
DROPDOWN: MY ACCOUNT / OPTIONS
SIGNING UP
Text
Text (Hover)
#A03F9B
#3E53A4
Preview
signing up
SWITCH ACCOUNT
Text
Text (Hover)
#A03F9B
#3E53A4
Preview
Switch Account
VIEW BILLS
Text
Text (Hover)
#A03F9B
#3E53A4
Preview
View Bills
ENROLL
Text
Text (Hover)
#A03F9B
#3E53A4
Preview
Enroll
MANAGE
Text
Text (Hover)
#A03F9B
#3E53A4
Preview
Manage
Apply Settings
Reset Back to Basic

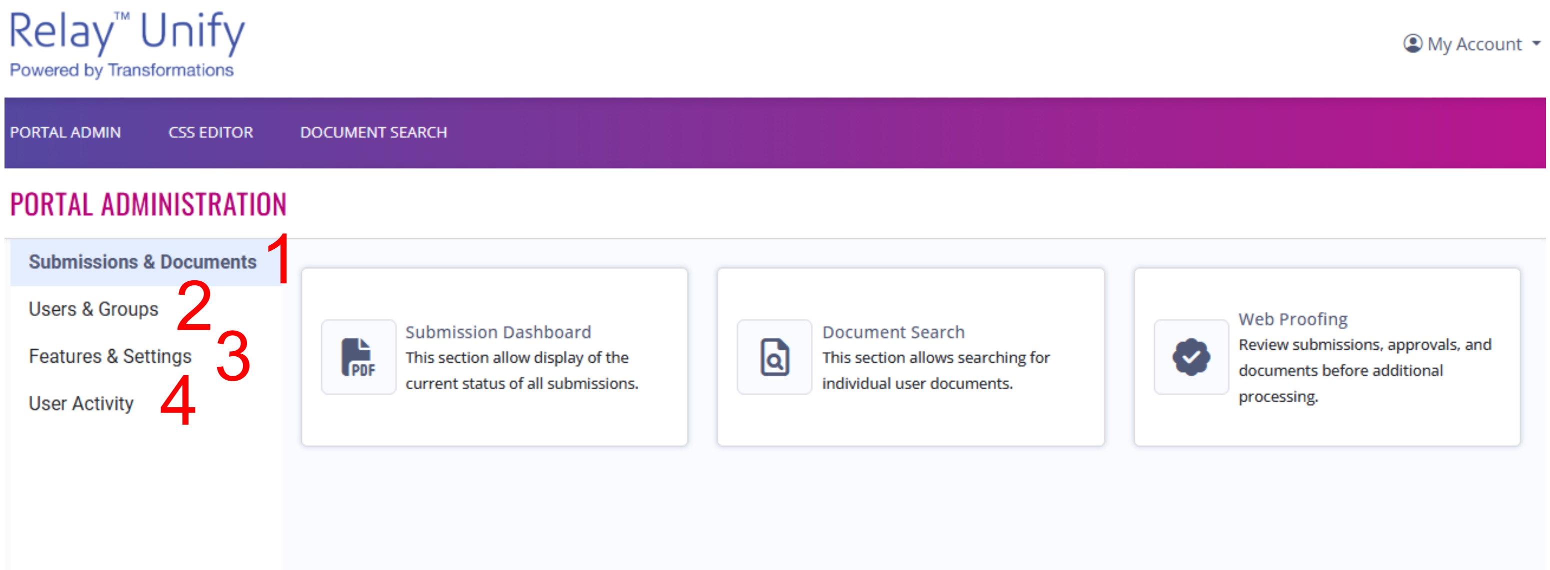
Admin Main Page

This is the main page that the admin sees once logged into the site.

An admin user by default has access to the following tabs and options:

Tabs:

- Submissions & Documents
- Users & Groups
- Features & Settings
- User Activity



Options:

- Submission Dashboard
- Document Search
- Web Proofing
- Group/User Management
- Manage CSS Styles
- Upload Files
- View & Print Reports
- User Activity History

The position, text, images, etc. for each of these can be edited under the Site Design Dropdown tab in a client's web setup. Then select Admin Landing Page along the left side.

Display – Check to enable for the admin user to see it on the Admin Home page.

Web Page – This is grayed out and cannot be edited. This is the page the admin user will be directed to when clicking the link on the Admin Home Page. Each of these has a specific function so these pages cannot be altered.

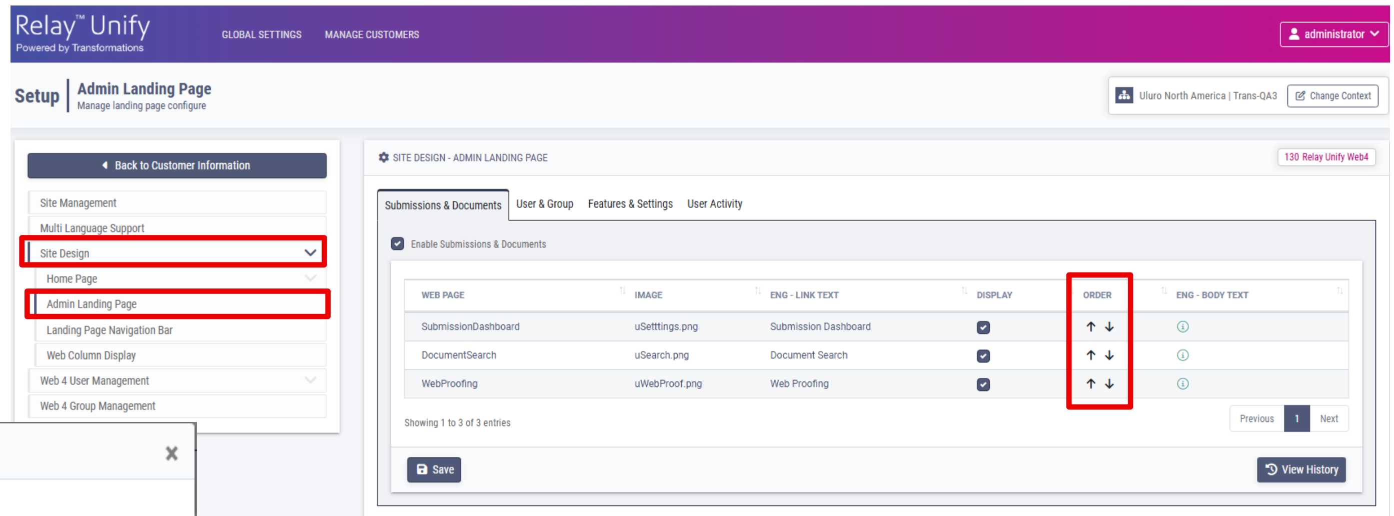
Image – This is the image displayed to the left of each option. This is grayed out and cannot be edited.

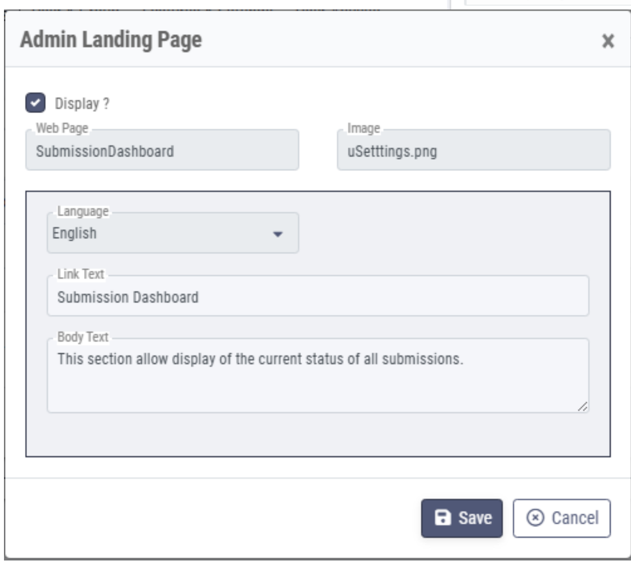
Language – This displays the dropdown of your default language, and what the text for this particular box will display. This cannot be edited.

Link Text – This is the heading text displayed for each option that the user will click to select each.

Body Text – This is the text below the heading that describes the functionality of each link.

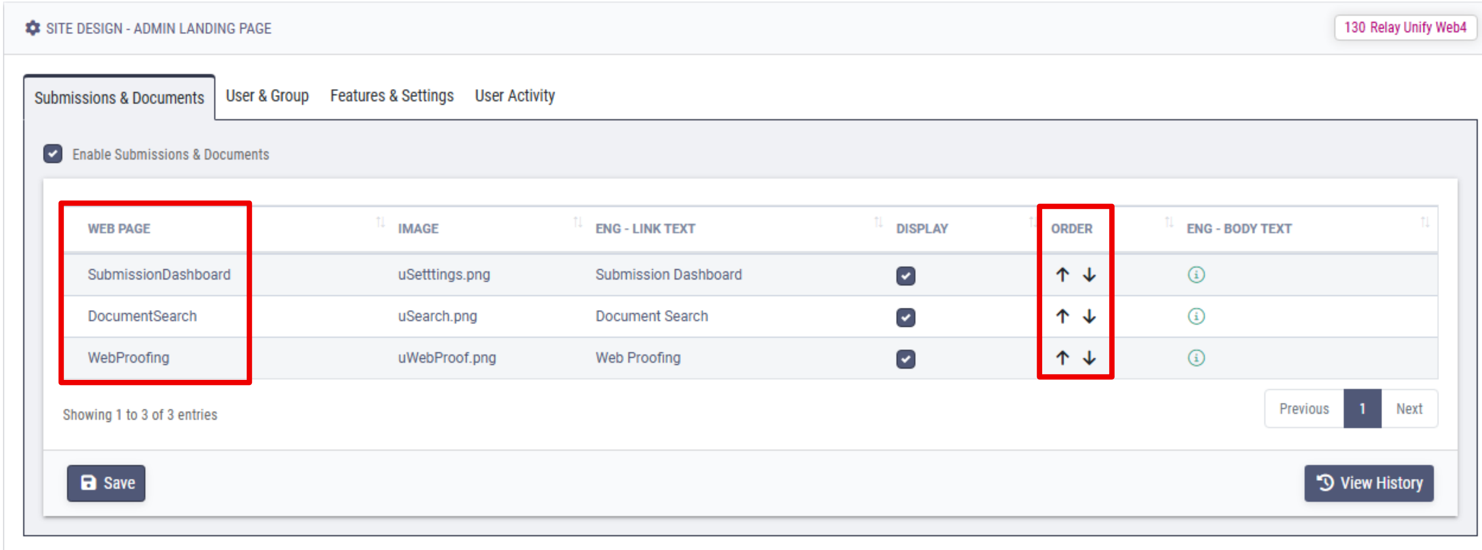
Order – This will be the order that the options are displayed on the Admin Home Page.

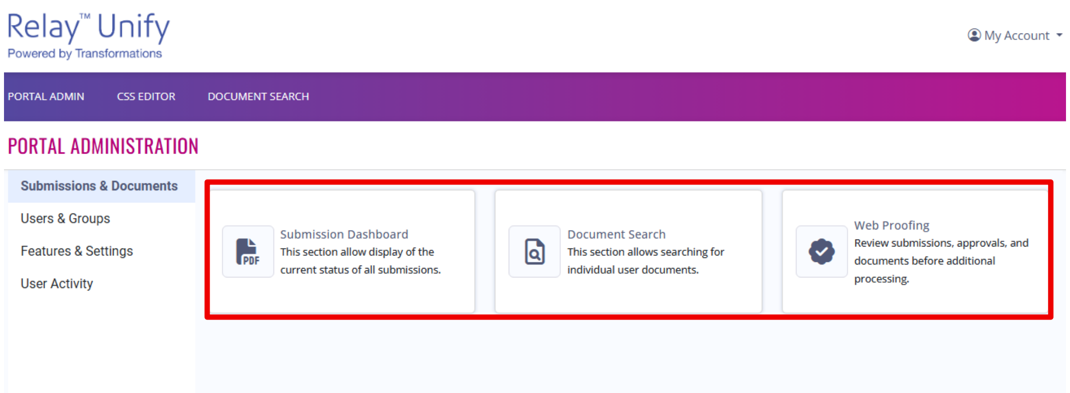




You can edit the order of the icons in each of the 4 different tabs on the Admin Landing Page using the arrows.

However, you cannot duplicate an order position. You can enable or disable both the main tabs, as well as the individual options under those tabs.





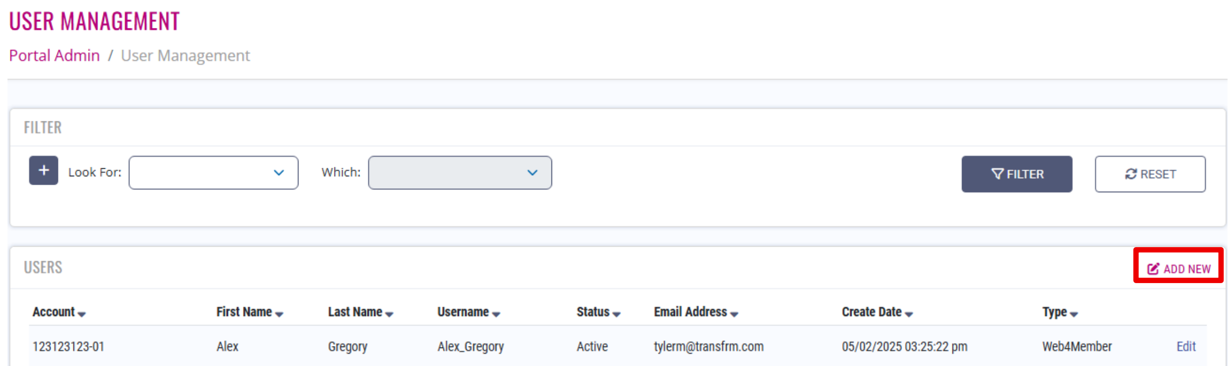
Tips:

These settings can only be disabled as an admin in uSetup Web. They must be enabled to be seen by the user. Disabled here will make it disappear from the page.

Users

User Management

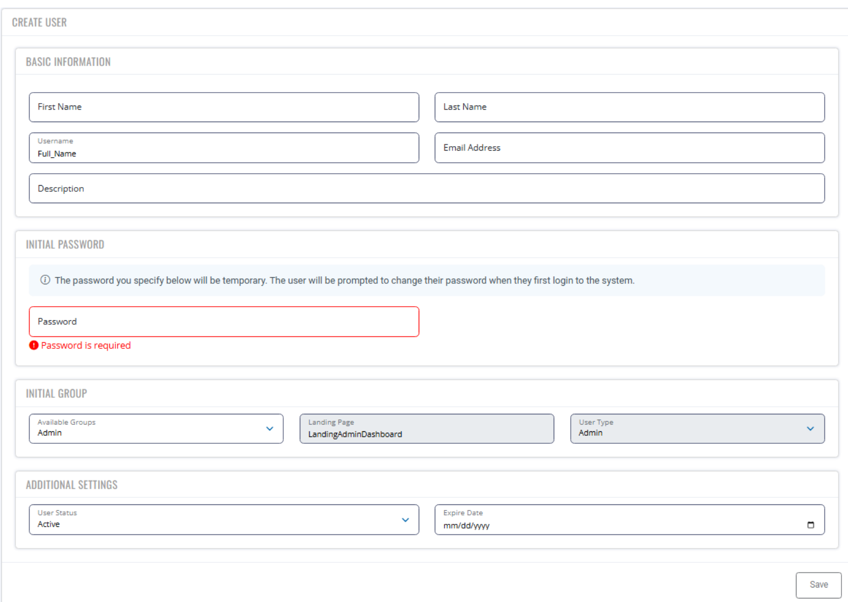
From the Admin Home Page, select the Users & Groups tab and then select User Management. This is where an admin user can create a user or edit the settings and profile of an individual user.

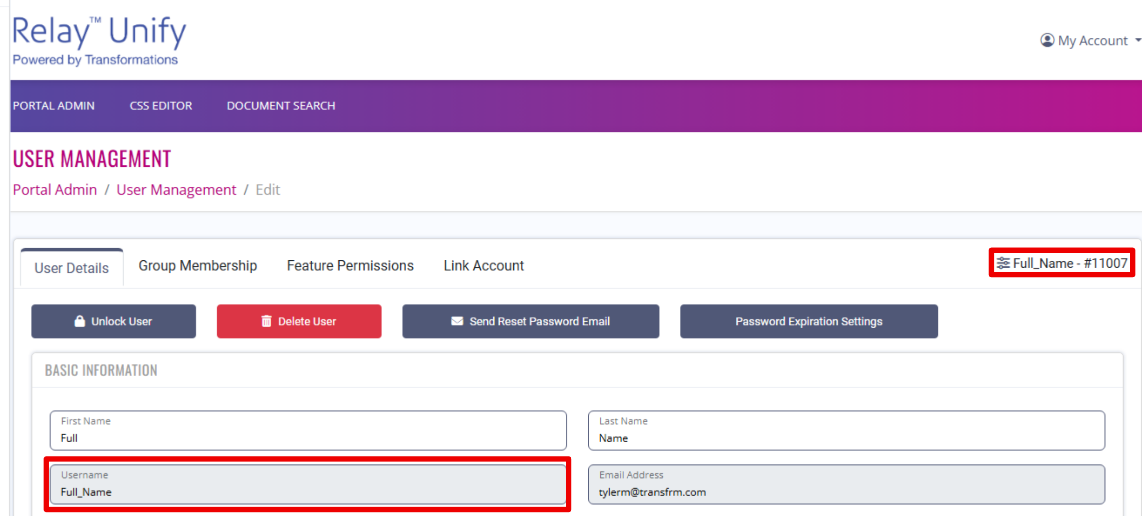


Creating a new user

Click the Add New button.

First/Last Name – This will be saved in the user's profile and visible to the admin in uSetup Web and in User Management.





Username – This must be unique for each user on the site. If it is already in use, you will get an error. See image below.

Email Address – This will become the primary email saved to the user's profile. This is also the email address that the Enrollment email will be sent to.

Description – This is a brief description of who this user is and what their role is.

Password – This can be anything that abides by the password settings.

Available Groups – This dropdown will determine which landing page you will land on when the user signs in to their portal. This is set up in uSetup Web by the Admin and determines which landing page the group will go to.

Landing Page – This is grayed out, and is determined from what has been set up as a group in uSetup Web.

User Type – The dropdown will list the default user types that are standard to uSetup Web. The default users are Admin, and Member. This dropdown is grayed out because it chooses the user type from your selection from Available Groups.

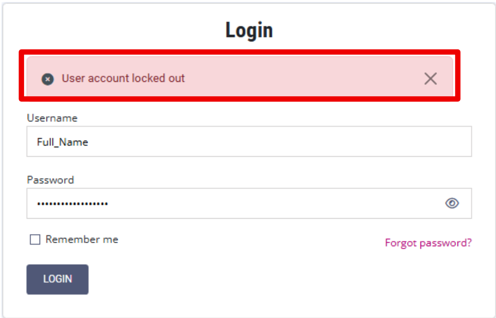
User Status – This should be active when creating a new user. If one of the other statuses is selected users will not be notified of their web account nor will users be able to log in to the site.

Active – Users are able to log in.

New – Users that have self-registered but have yet to log in to the site to finish the registration process.

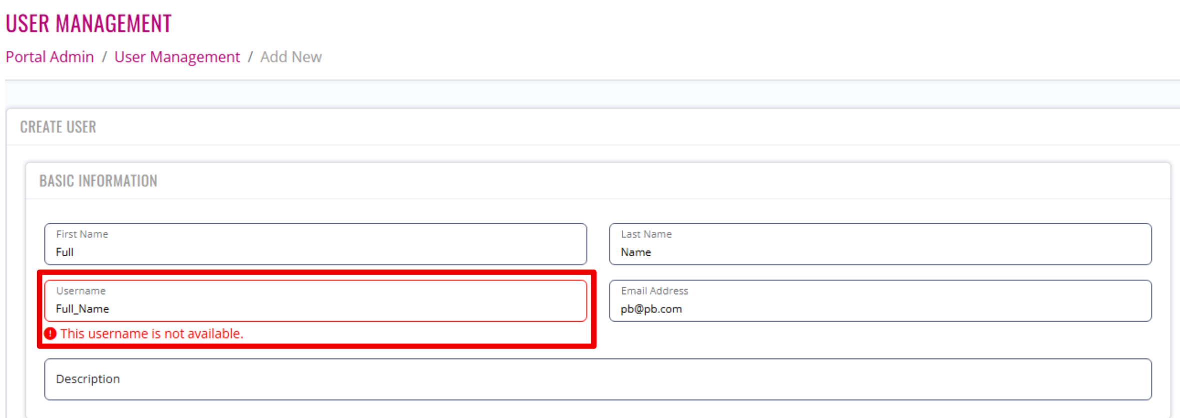
Inactive – User cannot login; The user will receive an error that the account is not active.

Unenrolled – User cannot login; The user will receive an error that the account is not active.

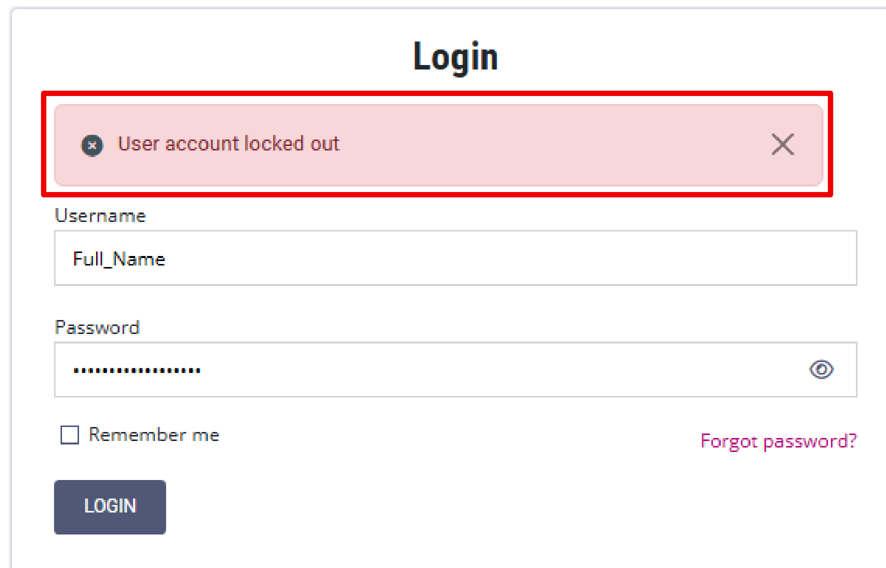


Tips:

If using a standard password setup for initial users such as firstname_lastname you can include that in the enrollment email with the site and login information for that user.

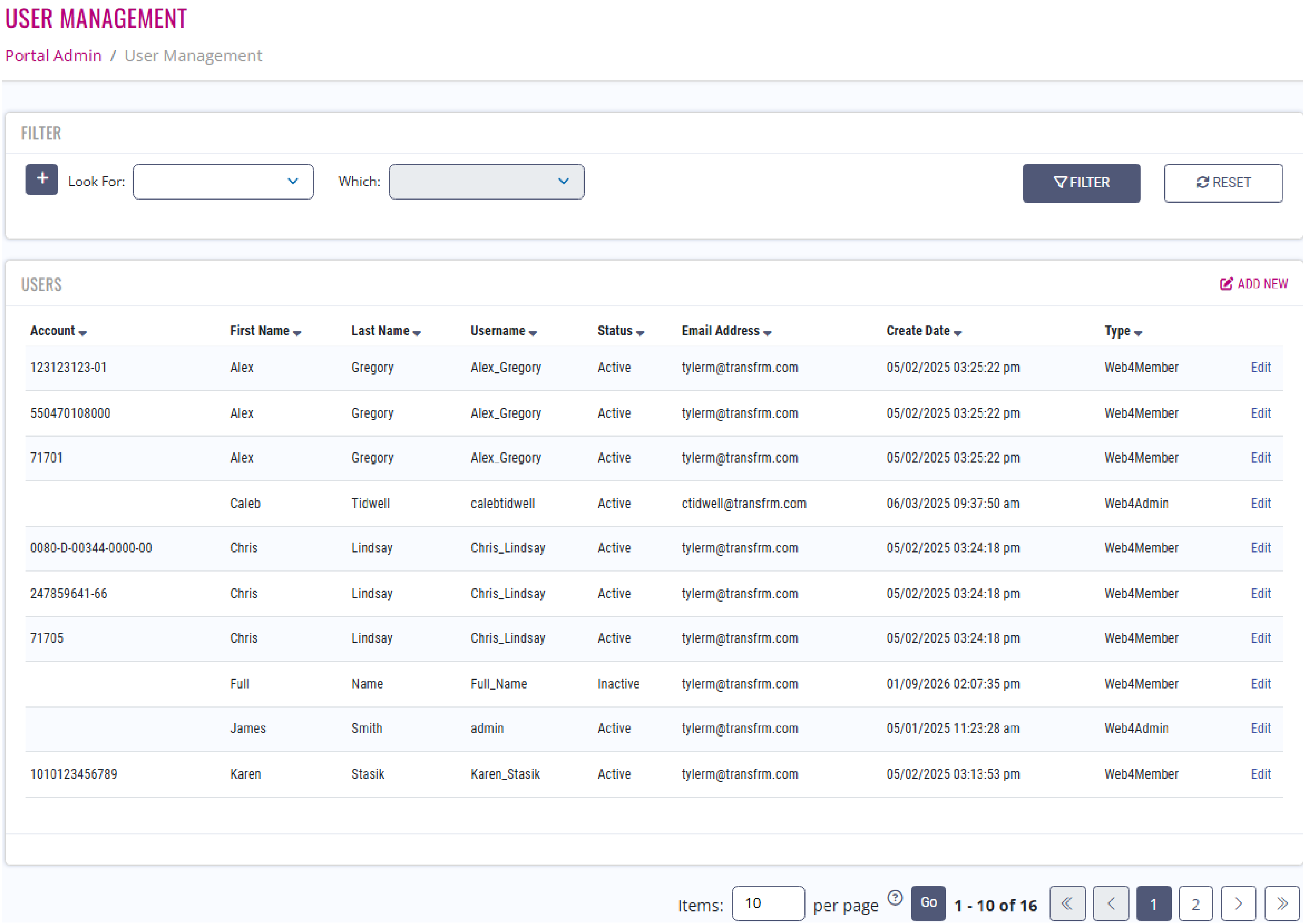


Account Expires – Select a date that the account should become expired. Leave it blank if the user account should never expire. After the date entered here, the user will get an Invalid Login error when attempting to login. Only an admin user can change the account expiration date in the user's profile to avoid expiration or once expired.



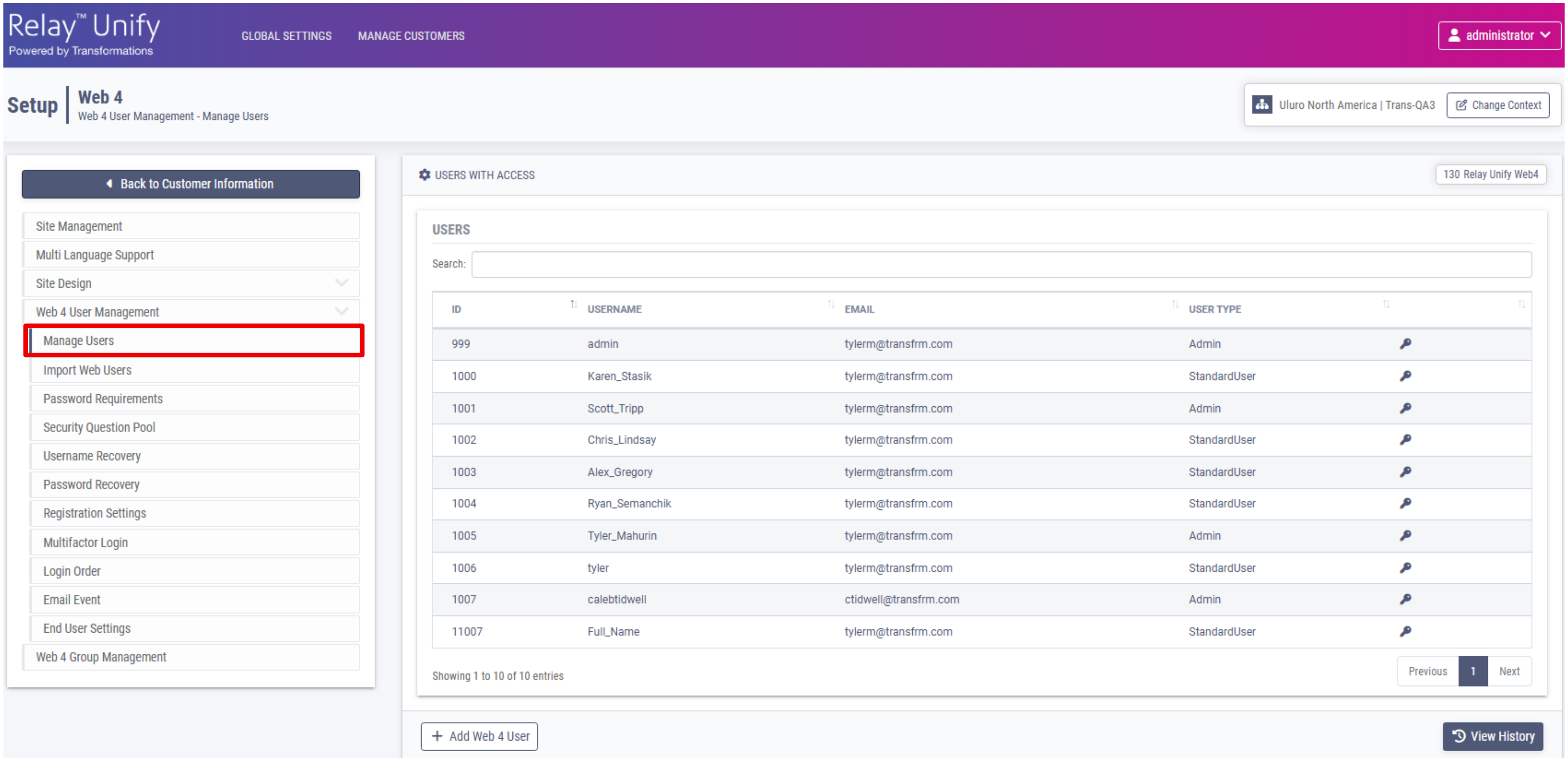
Save the user. The user will receive an enrollment email.

All the users for a site will be listed under User Management.



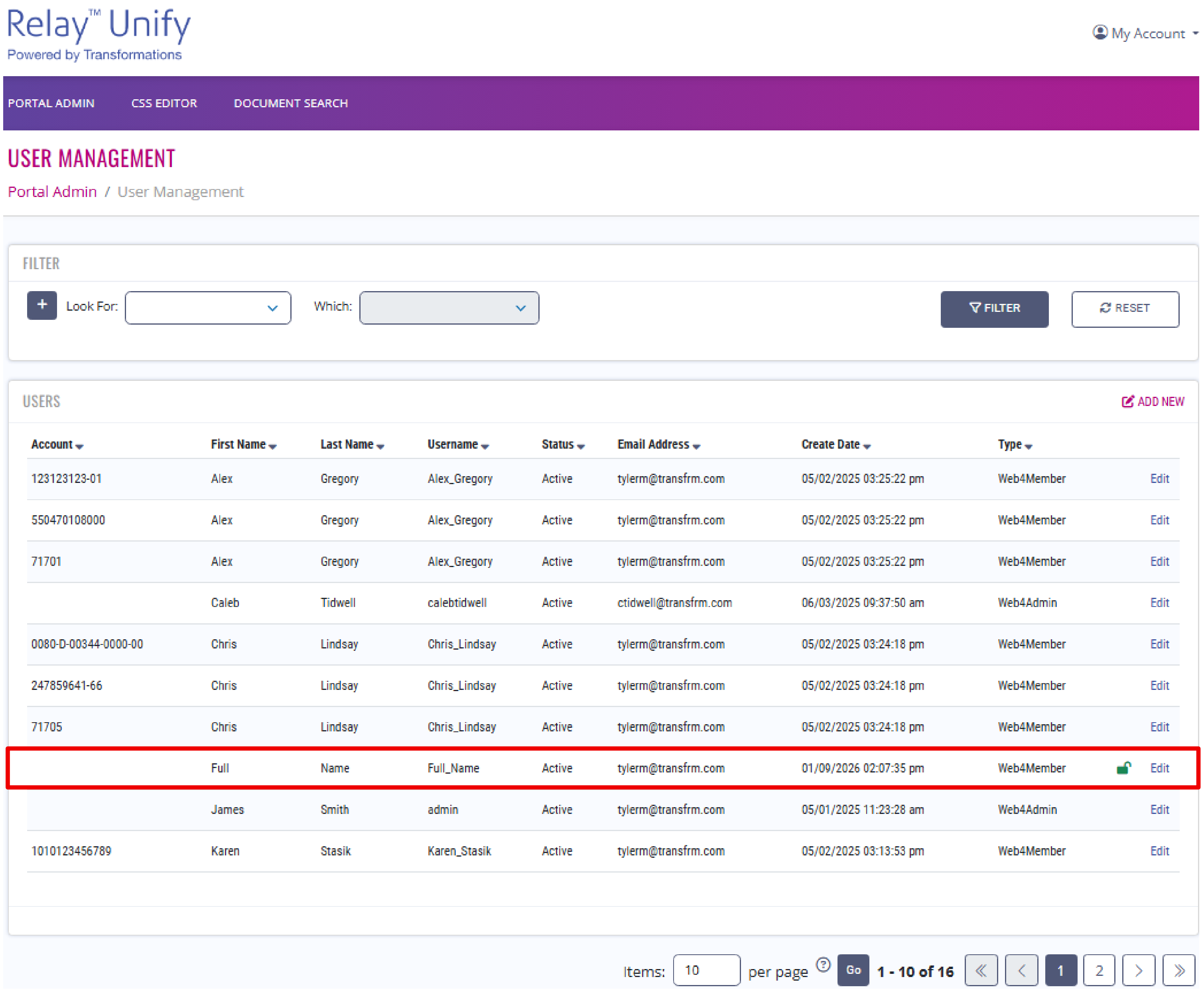
Account	First Name	Last Name	Username	Status	Email Address	Create Date	Type	
123123123-01	Alex	Gregory	Alex_Gregory	Active	tylerm@transfrm.com	05/02/2025 03:25:22 pm	Web4Member	Edit
550470108000	Alex	Gregory	Alex_Gregory	Active	tylerm@transfrm.com	05/02/2025 03:25:22 pm	Web4Member	Edit
71701	Alex	Gregory	Alex_Gregory	Active	tylerm@transfrm.com	05/02/2025 03:25:22 pm	Web4Member	Edit
	Caleb	Tidwell	calebtidwell	Active	ctidwell@transfrm.com	06/03/2025 09:37:50 am	Web4Admin	Edit
0080-D-00344-0000-00	Chris	Lindsay	Chris_Lindsay	Active	tylerm@transfrm.com	05/02/2025 03:24:18 pm	Web4Member	Edit
247859641-66	Chris	Lindsay	Chris_Lindsay	Active	tylerm@transfrm.com	05/02/2025 03:24:18 pm	Web4Member	Edit
71705	Chris	Lindsay	Chris_Lindsay	Active	tylerm@transfrm.com	05/02/2025 03:24:18 pm	Web4Member	Edit
	Full	Name	Full_Name	Inactive	tylerm@transfrm.com	01/09/2026 02:07:35 pm	Web4Member	Edit
	James	Smith	admin	Active	tylerm@transfrm.com	05/01/2025 11:23:28 am	Web4Admin	Edit
1010123456789	Karen	Stasik	Karen_Stasik	Active	tylerm@transfrm.com	05/02/2025 03:13:53 pm	Web4Member	Edit

All of the users will also be listed under uSetup Web for the client. Select the Web 4 User Management Dropdown > Manage Users to see the entire list.



Edit a User

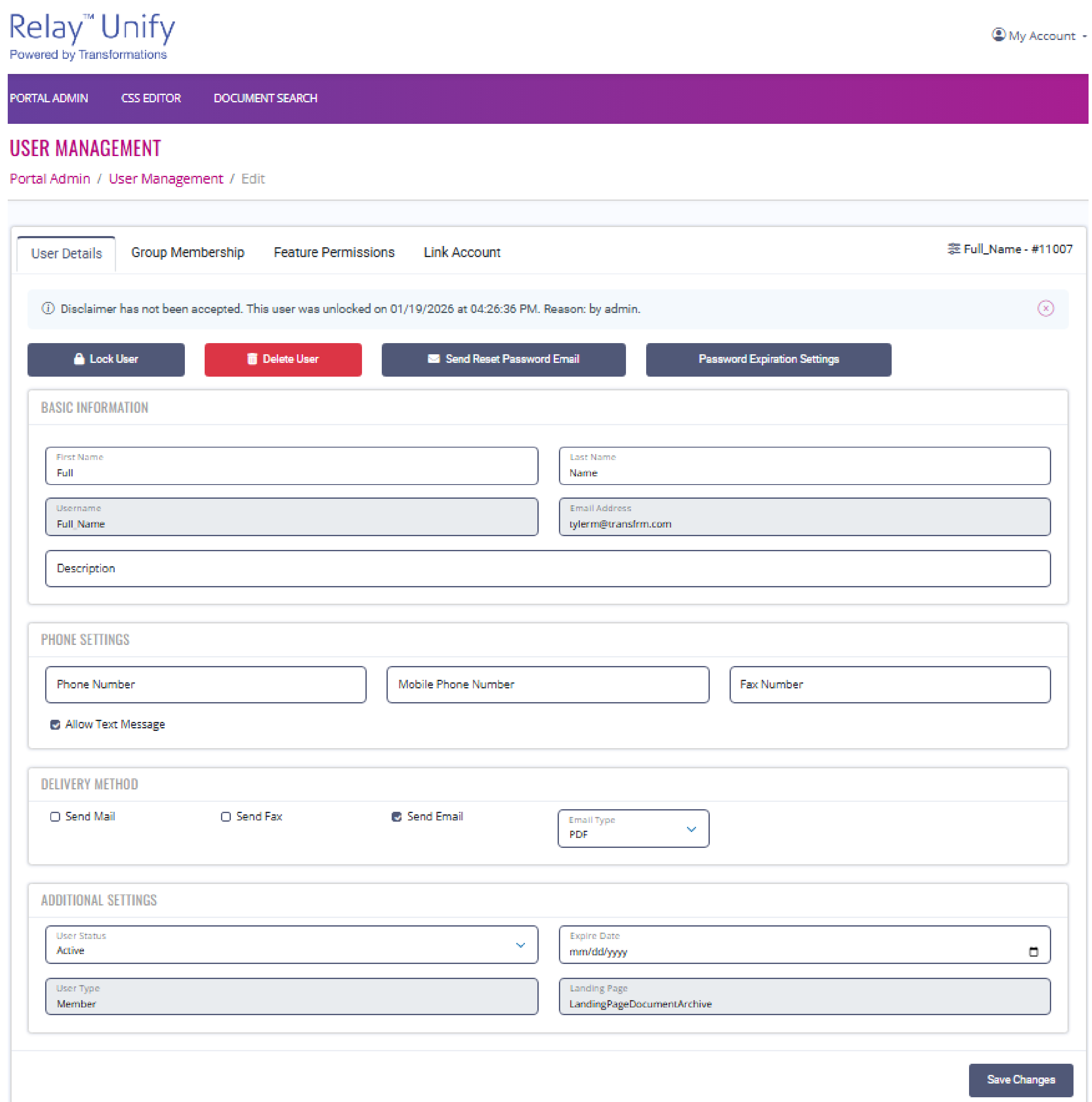
Within the User Management page, admin users can edit various user settings. Select the user that you wish to edit.



This will have the user's profile items in addition to some administrative settings that only an admin can edit here.

Only accessible on this page for admin users to edit:

- Basic Information
- Phone Settings
- Delivery Method
- User Status
- Expire Date
- Lock User
- Group Membership
- Feature Permissions
- Link Account
- Any items that have been hidden from the user's profile



Any custom field used for New Password Verification/Registration Verification will show up in the appropriate location, including the admin page. (ex: Last 4 SSN)

First/Last Name – The name of the user.

Username – Used to log in to the site. This cannot be edited.

Email Address –This cannot be edited here. It must be edited under Manage User's Email.

Description – This is a brief description of who this user is and what their role is.

Phone Number – This will be used for voice messages.

Mobile Number – This will be used for SMS messages.

Fax Number – The fax number for this user if receiving faxes.

Allow Text Messages – This enables the user to receive SMS messages.

Send Mail – Check this box if you would like to receive paper mail.

Send Fax – Check this box if you would like to receive a fax.

Send Email – Check this box if you would like to receive an email and select your delivery type from the dropdown menu.

Email Type – Choose one of 3 email types. PDF, URL, or Secured PDF (if activated).

User Status – The user can only log in if the status is Active. You can change it to Inactive if you no longer want this user to be able to log in.

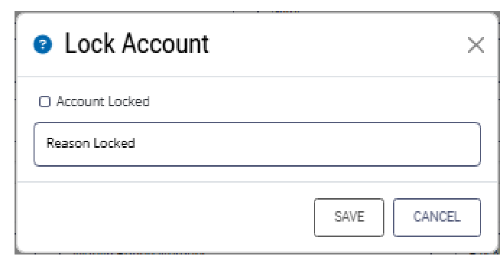
Expire Date – If blank, the account never expires. Select a date for the account to expire or edit the date as necessary.

User Type – Based on the type chosen, the user will have the security settings that are associated with that user type. This is grayed out as it is linked to the group selected when setting up the user, it can be either Admin, or Member.

Landing Page – This is grayed out after the user is set up. It is chosen when the user is being set up, and additional selections can be set up in uSetup Web.

Accepted Disclaimer – Shows if and on what date the disclaimer was accepted by the user. This cannot be edited. It is displayed across the top of the user's page.

Delivery Method – This is how the user prefers to receive statements. If email is checked, URL or PDF will need to be selected as the email type.



Lock User – If this is turned on, a date field will appear with the date the account was locked because of too many login attempts, and this is displayed across the top of the user's page.

Reason Locked – This will display why the account was locked.

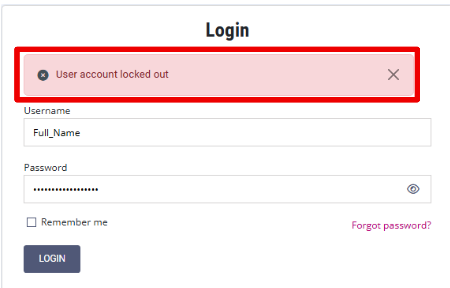
Group Membership Tab – Select this tab to be able to change the group that the selected user is currently in.

Feature Permissions Tab – Select this tab to be able to give this particular user specific permissions on the web portal that may not have been granted via the group that the user is in.

Link Account Tab – Select this tab to add the user's account information for a particular submission that has been run through the web portal.

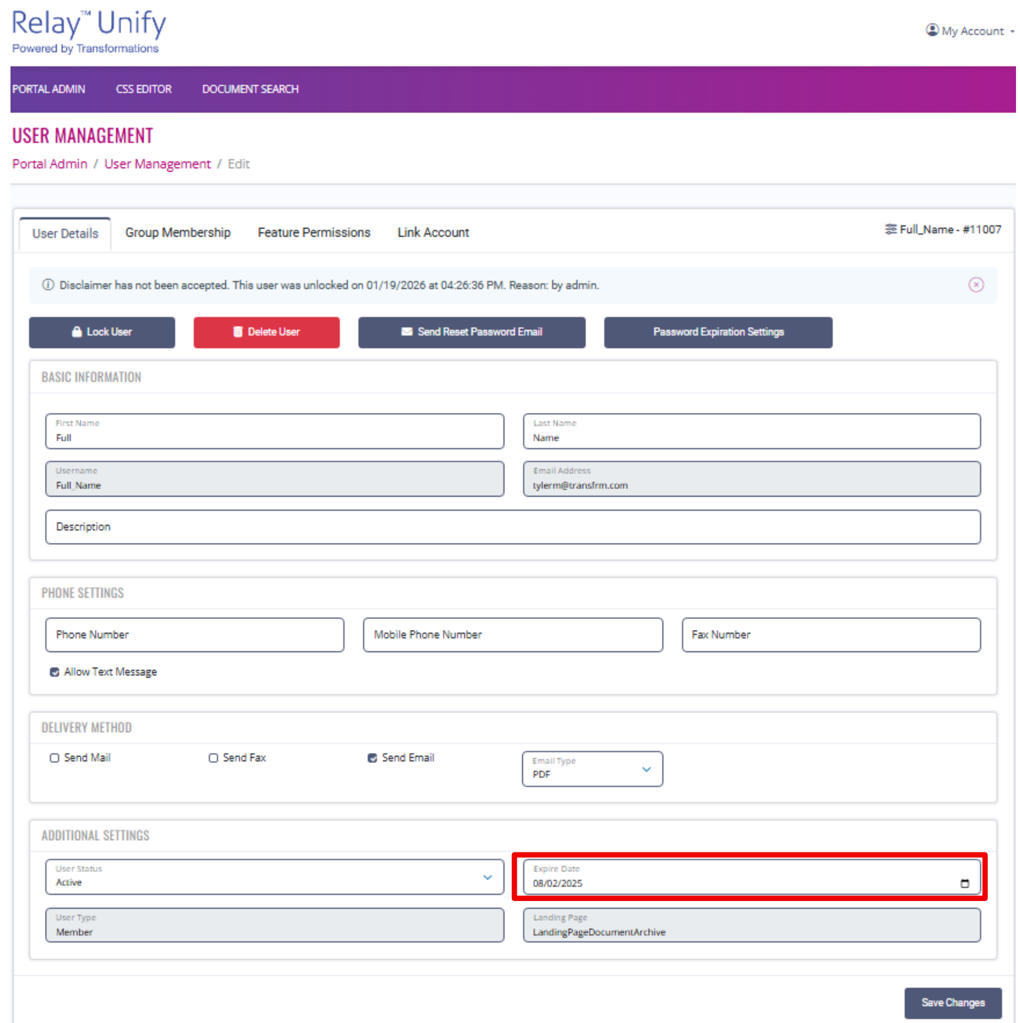
Account Expired

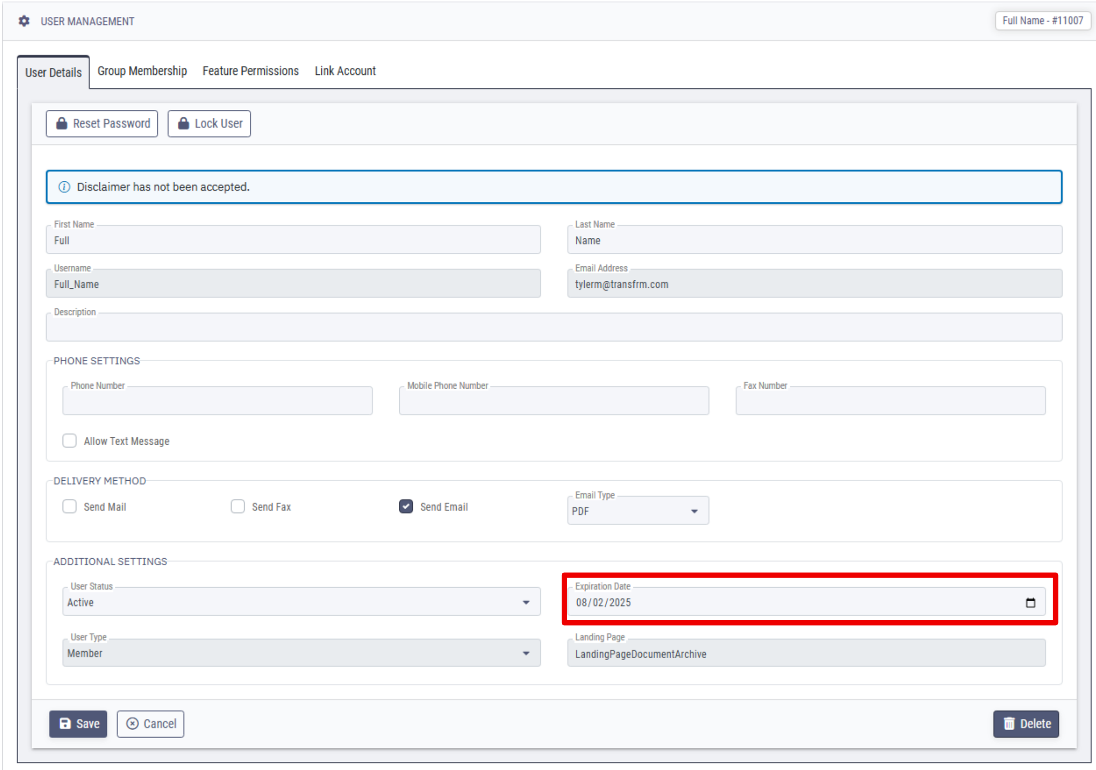
If a user's account has expired, the next time the user attempts to log in, this error will come up, and the user will not be able to login.



The expiration date of the account is visible to admin users on the web under User Management. Select a user and under the user details tab the account expiration date is displayed. It can be edited here.

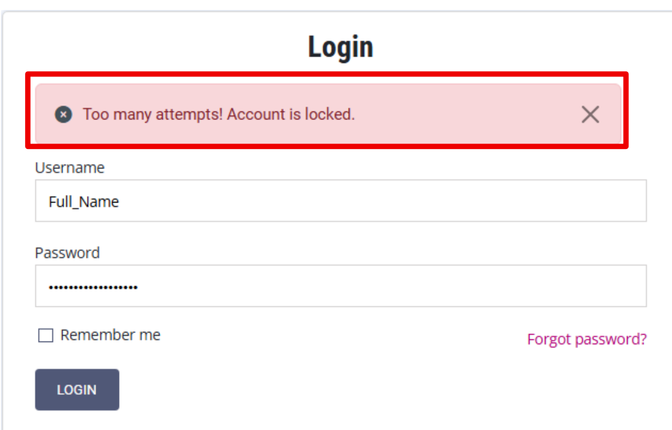
This is one of two ways to edit the expiration date of a user's account. The other is in uSetup Web under the Manage Users Tab by clicking on the user's profile.





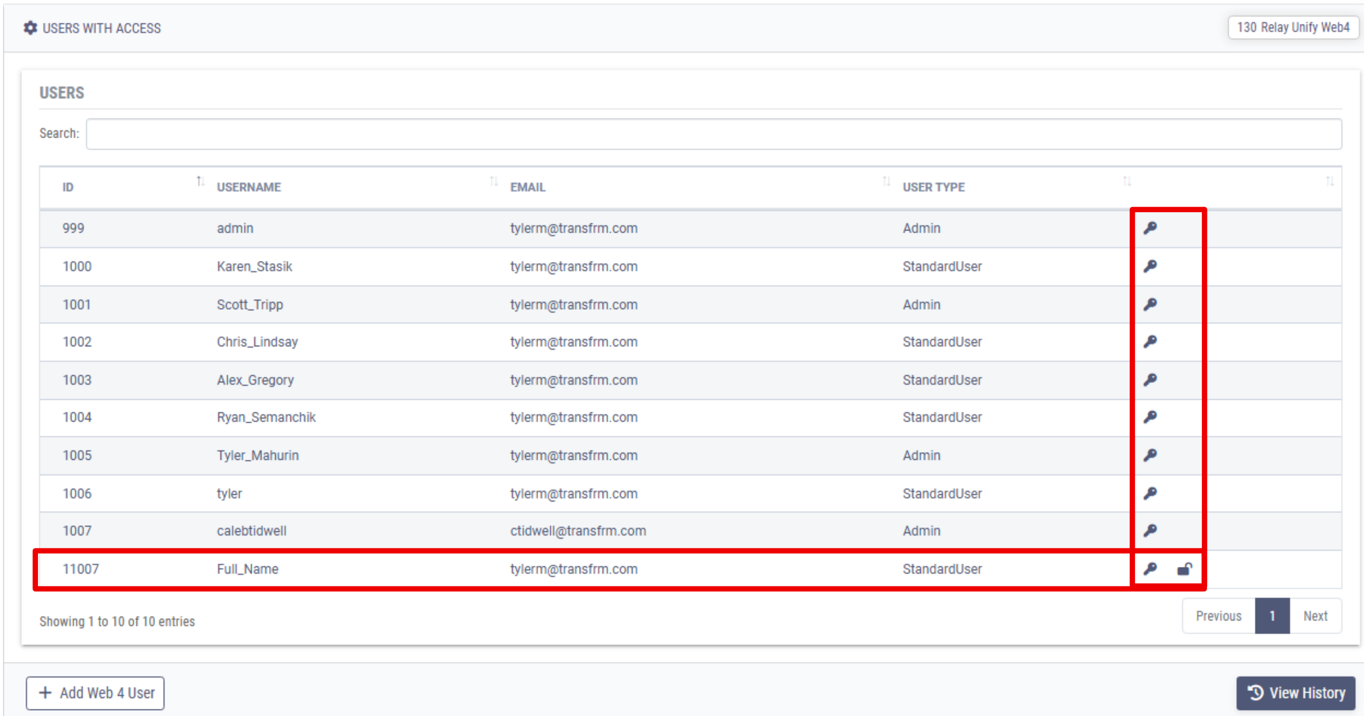
Account Locked

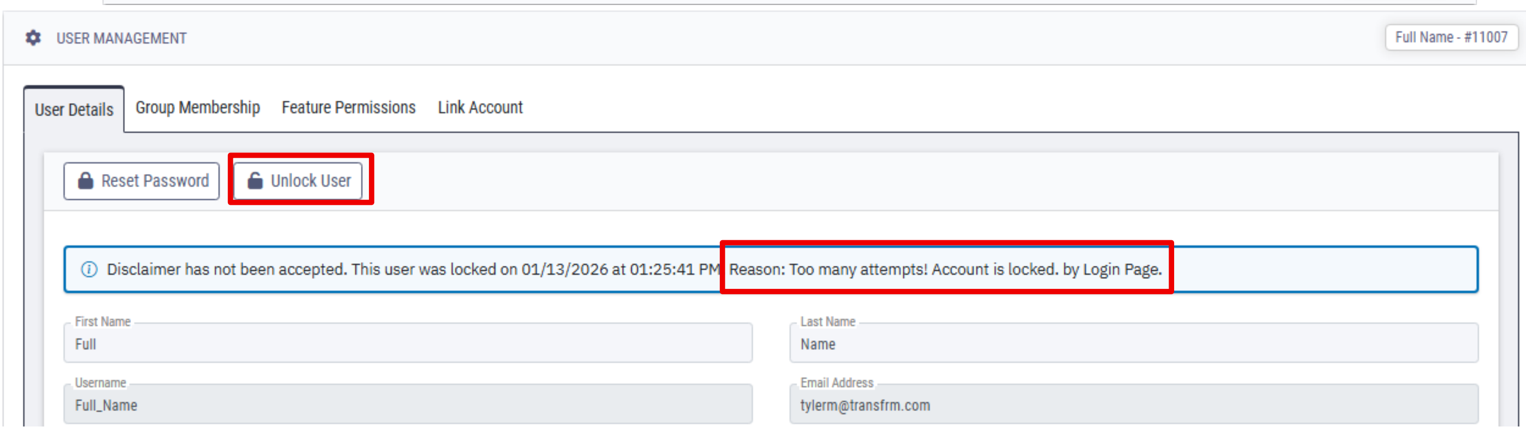
Accounts will be locked after too many login attempts (based on your settings). After 5 incorrect login attempts, on the 6th attempt the user will receive this error:



This can be verified by an admin one of two ways.

In uSetup Web, under the Manage User's Tab, there will be an image of an open lock in the far-right column. A locked date filled in, and a reason if a user's account is locked will be displayed if you click on the user's profile. To unlock the user, simply click on the user and select Unlock User, or click on the lock icon. The lock date and reason will immediately disappear, and the lock icon will go away. The user's account will no longer be locked.

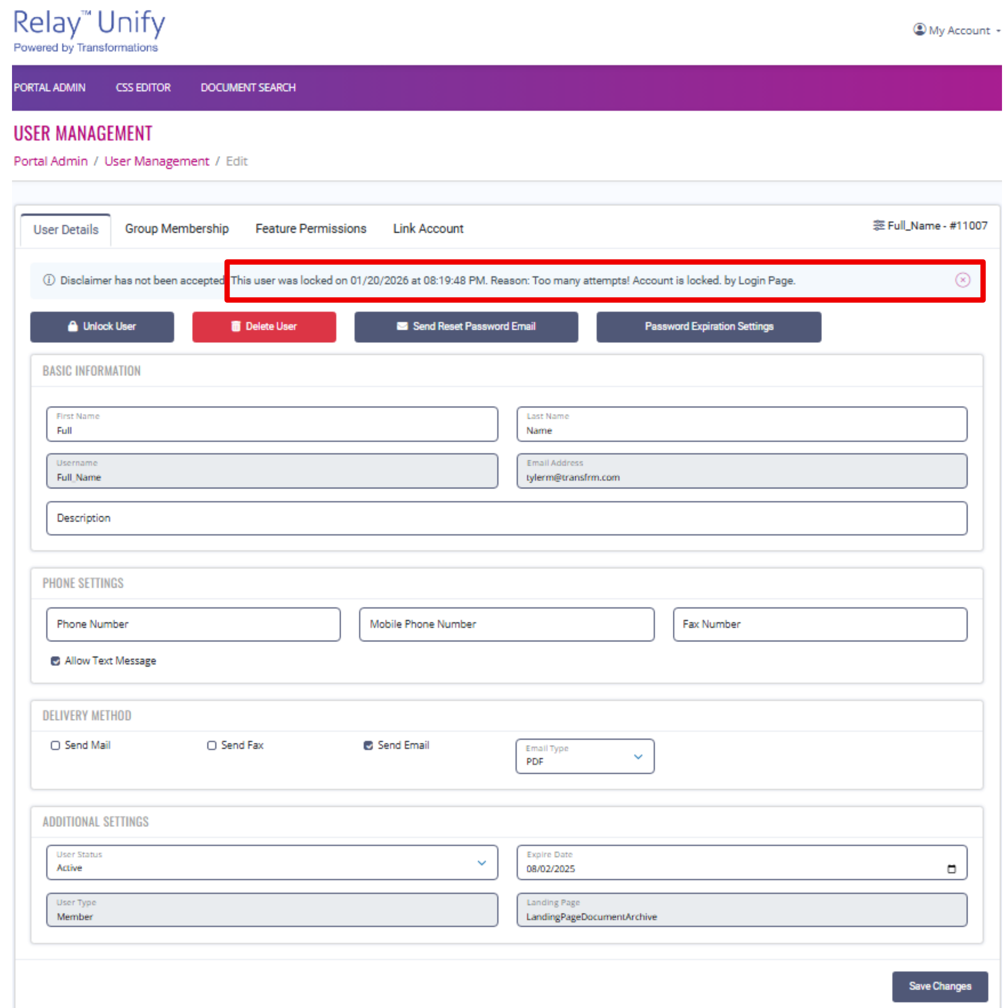




An admin user can select the user from the list in User Management. Under the User Details for that user, an admin user can see if the account is locked, the date it was locked, and the reason why it is locked.

To unlock the user here, simply click the Unlock User button, uncheck Account Locked and click the save button. The date and reason will now be blank, and the user's account will no longer be locked.

Once the account has been unlocked, the user will be able to login using their previous password or can reset it.



Tips:

Once a user's account is locked, the user cannot reset their password using the Forgot Password link.

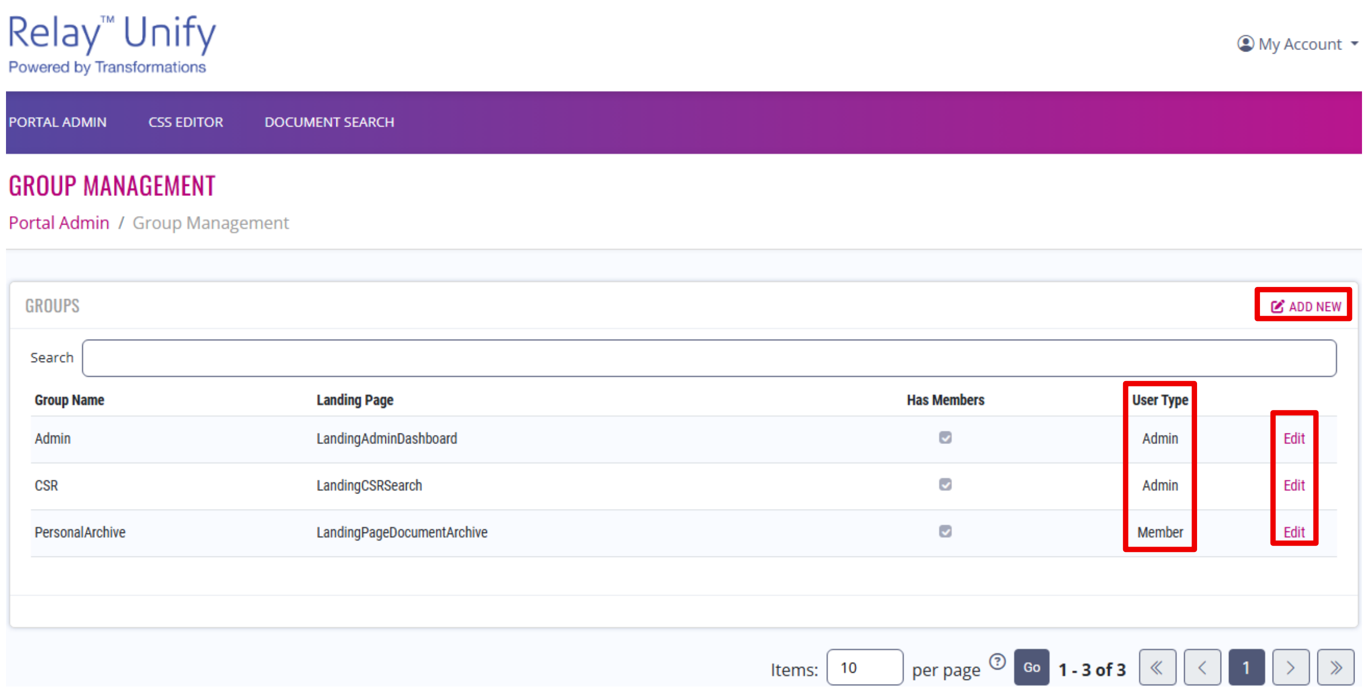
Web 4 Group Management

From the Admin Home Page, select Users & Groups, then choose Group Management. This is where an admin user can create additional groups and adjust the feature permissions each group is given.

By default there are two user types:

Admin, and Member.

Click on Add New to create a new group.
Or you can click on the Edit button to edit a current group



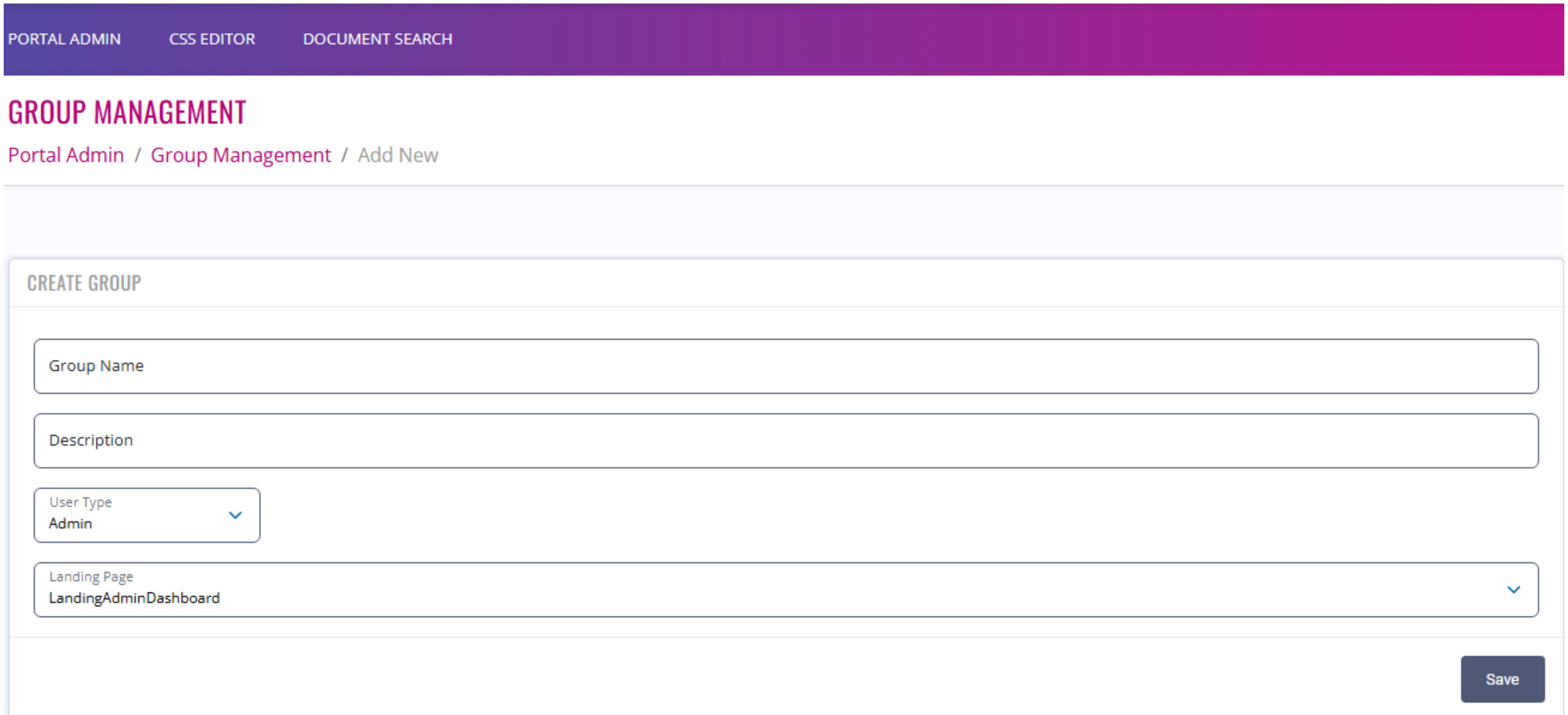
Create a New Group

Select the Add New button.

Tips:

We recommend creating additional groups and editing the feature permissions on your custom groups. This way you can revert back to the defaults if necessary. If you customize a group too much it is no longer a true standard group for example.

Group Management link will bring you back to the previous screen.



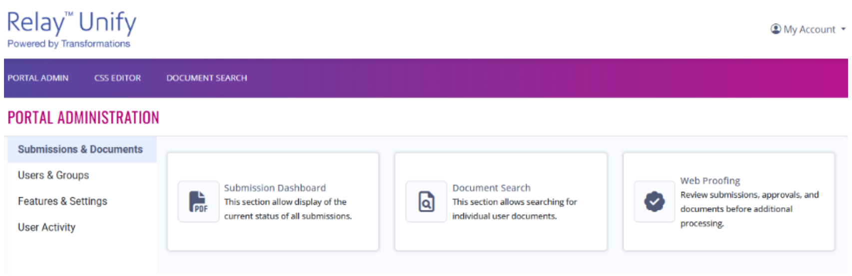
Group Name – This is the name that will represent the group when being selected. This will be displayed as a column for the list of groups under Group Management or the Web 4 Group Management Tab in uSetup Web to help identify the group type and associated permissions and settings that group is assigned.

Description – This will help explain what the Group Name means. Enter something that further explains the group being created and what users should be assigned this group.

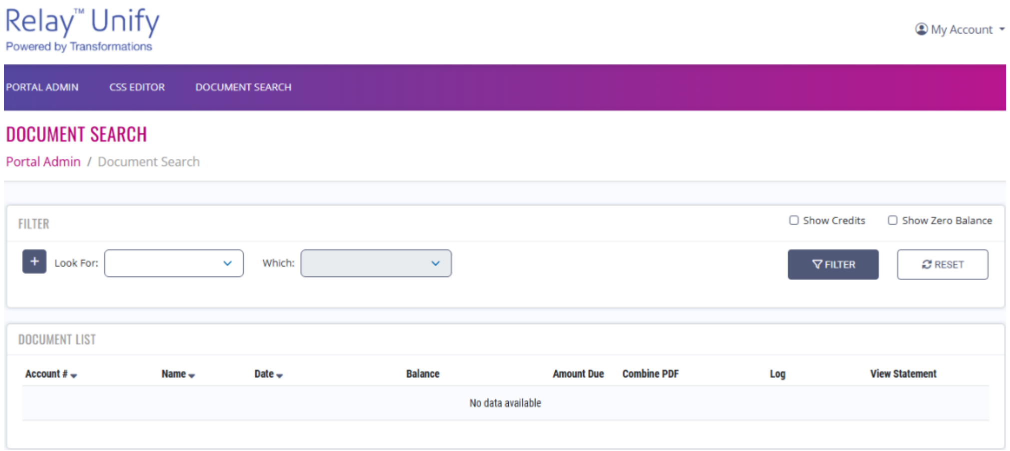
User Type – This dropdown will give you the ability to select between Admin and Member. Depending on which of the 2 is selected from the dropdown, this will help determine which landing page the user assigned to this group will land on.

Landing Page – This is the page seen by the user upon logging into the site. For Members the option is LandingPageDocumentArchive that will allow the Member user to see all of their documents on their dashboard. If the Admin is selected, the LandingAdminDashboard and LandingCSRSearch will be additional options. Choose the appropriate landing page for the user type you desire to create.

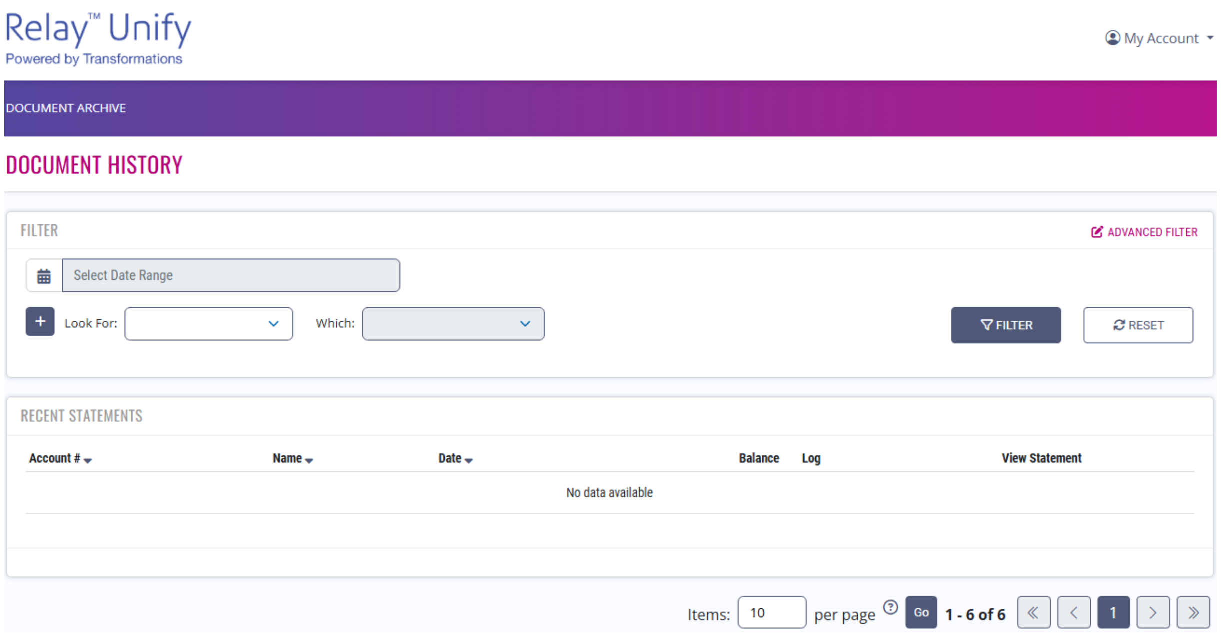
Admin Main Page



CSR Search Page



User Main Page



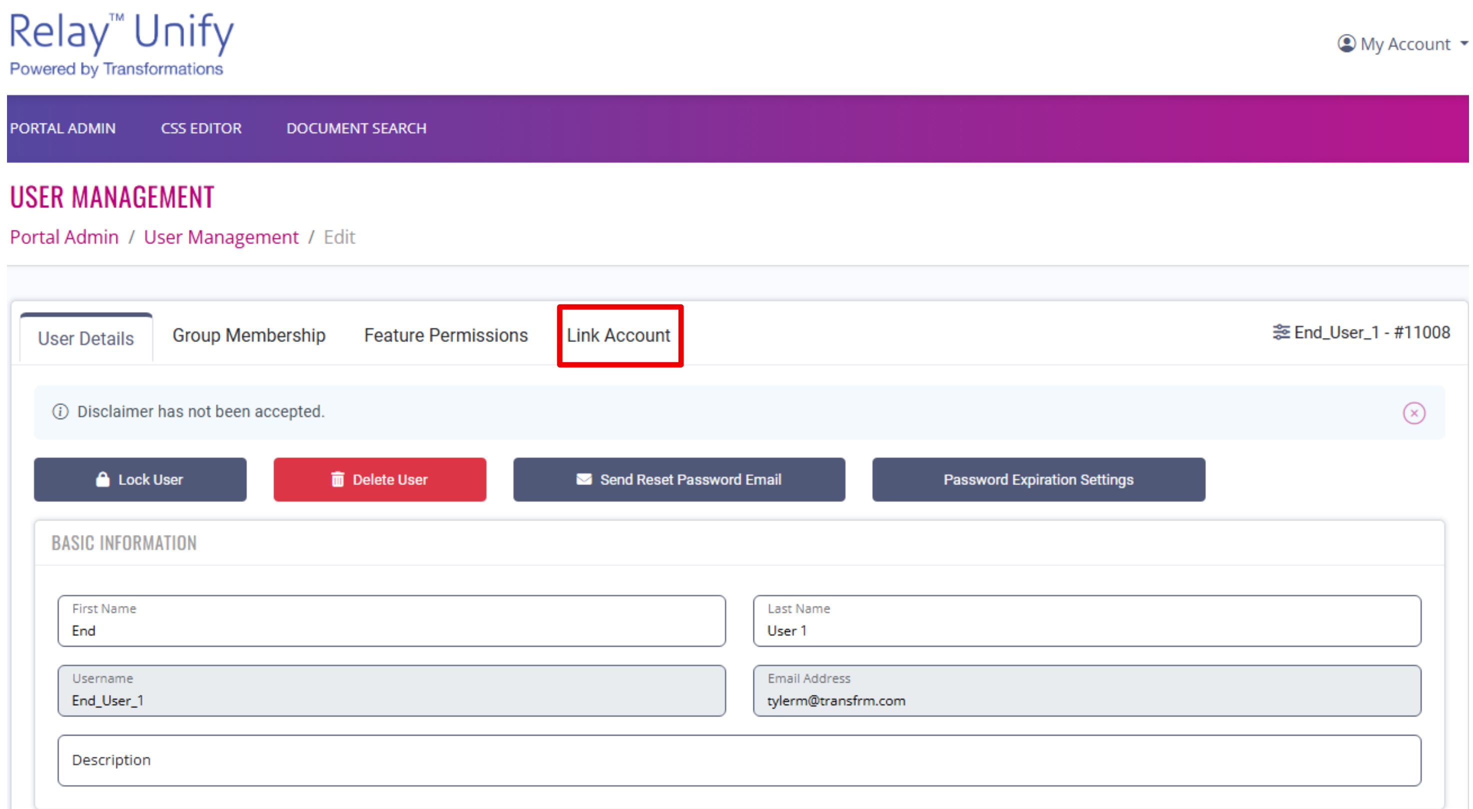
Add an Account to a User

The End User Main screen allows the end user to view only those documents containing an account number assigned to that web user.

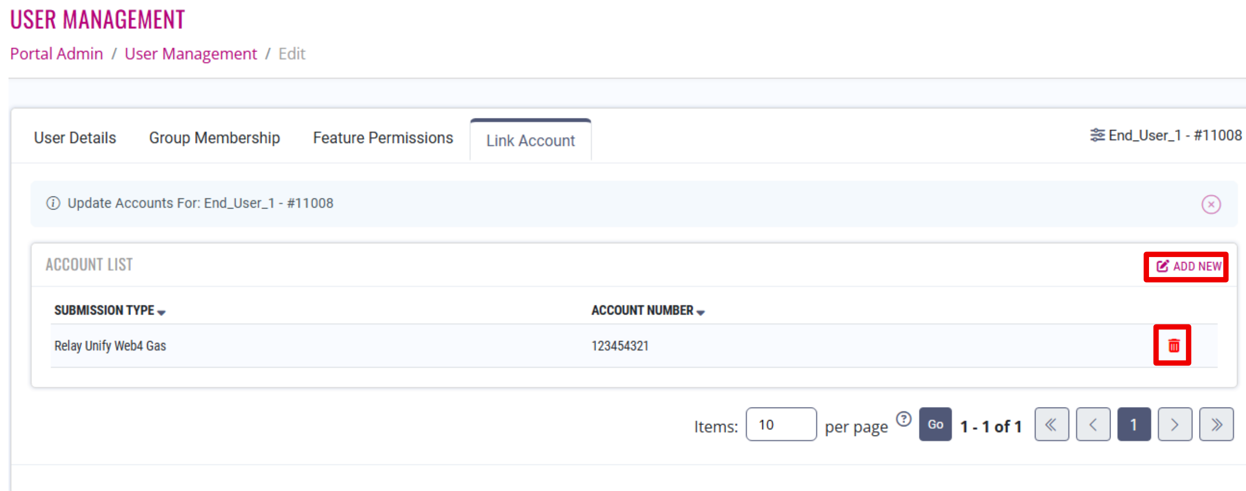
You can have multiple account numbers assigned to one end user account but the assigning must be done by an admin; end users cannot add account numbers to their account.

To add an account number to a user that has been previously created, an admin user must be the one to add the account number.

The admin user will select the user under the User Management from the list of all users for that site. Then select the Link Account Tab.



Click the Add New button. Any account numbers that have been added will be displayed in the box.



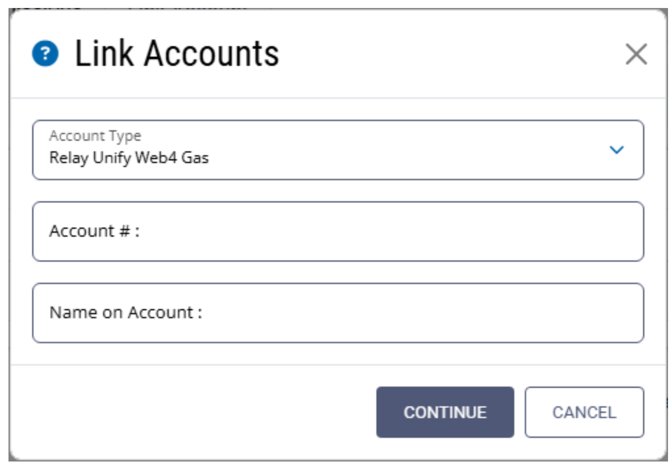
Account Type – Select a submission type. All sumbission types for this client will appear in this dropdown list.

Account # – This must be the account # as it appears on the statement.

Name on Account – This must be the name *exactly* as it appears on the statement. This field is case sensitive.

The admin user can add as many account numbers for a single submission as desired. Multiple accounts across multiple submissions are also possible.

To remove an account click the red trash can.



By default the account number and name on the account will be validated.

If you wish to change the default way of validating when adding acocunts to users, that can be done within each submission type under the web tab.

Validate Account # – If this is unchecked any account number can be added; it does not have to exist. If it is checked, then the account # must be in the system for that Submission type.

Name on Account Field – This can be hidden, optional, or required. It is required by default.

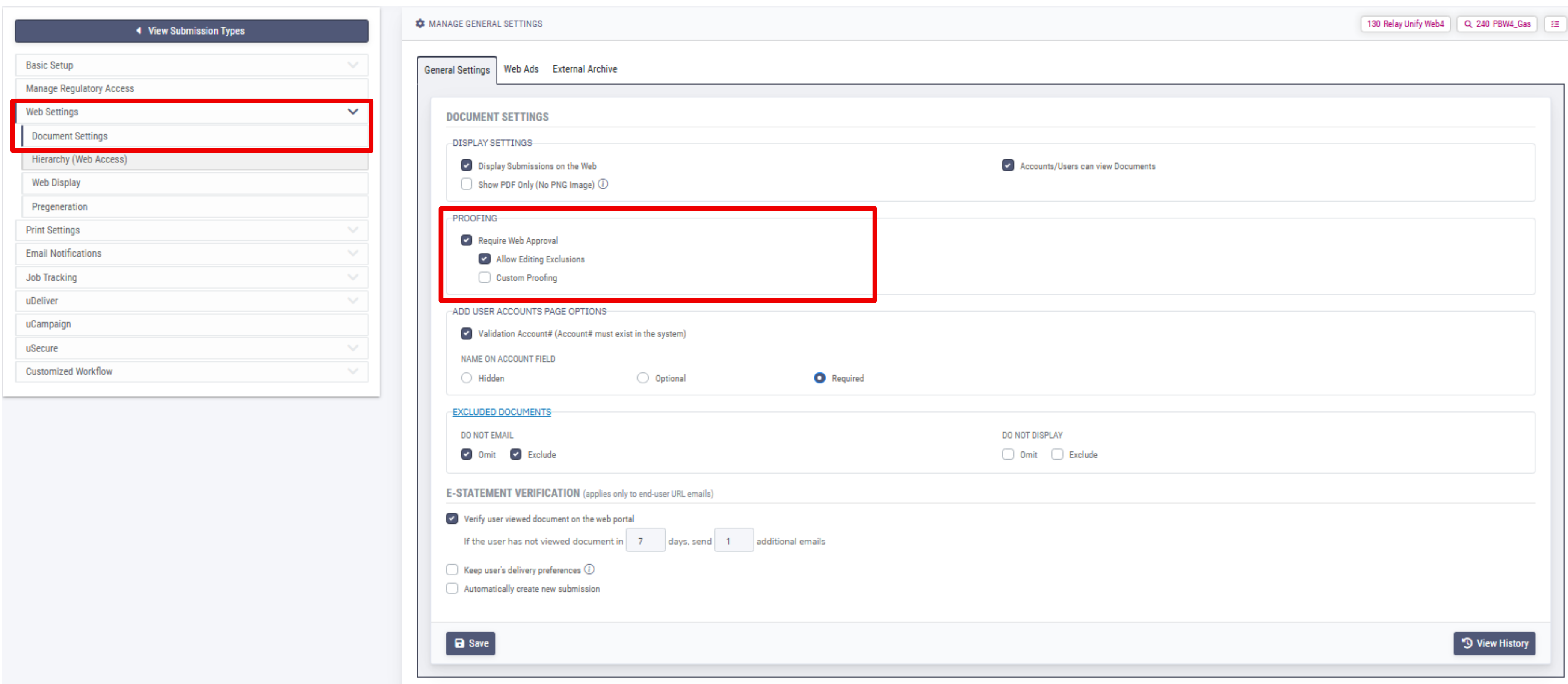
Hidden – It will not appear as a field when an admin user is adding accounts for a user.

Optional – The field can be blank or not match the name on the statement.

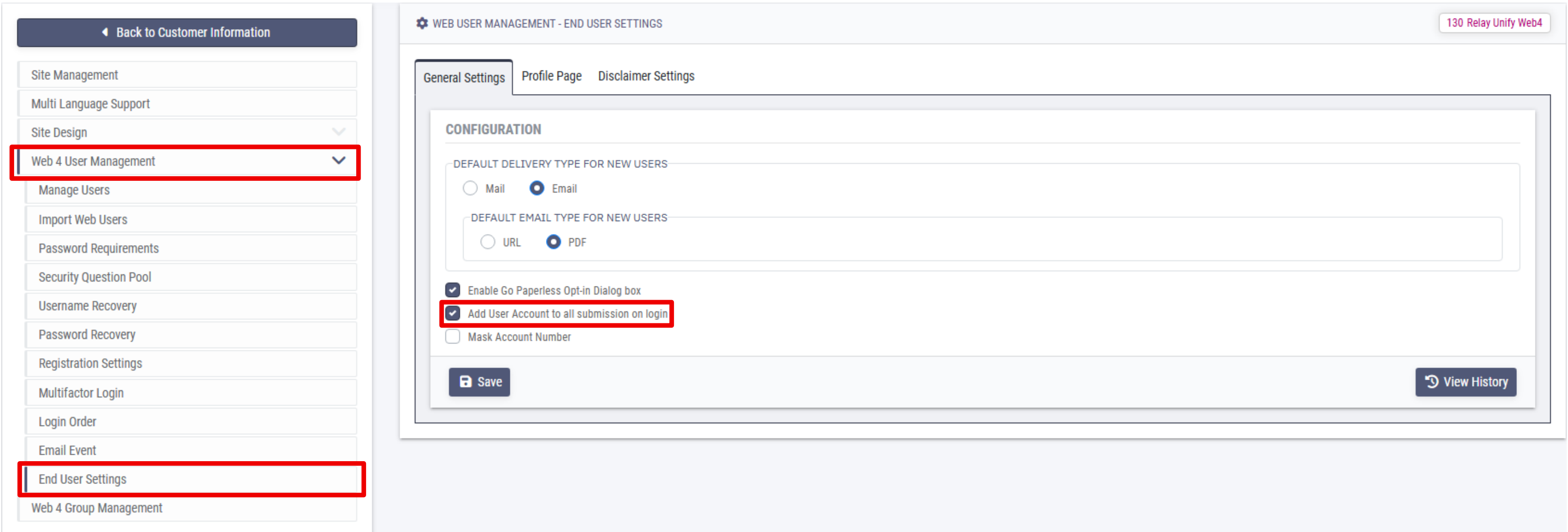
Required – The name entered must match the name as it appears on the statement.

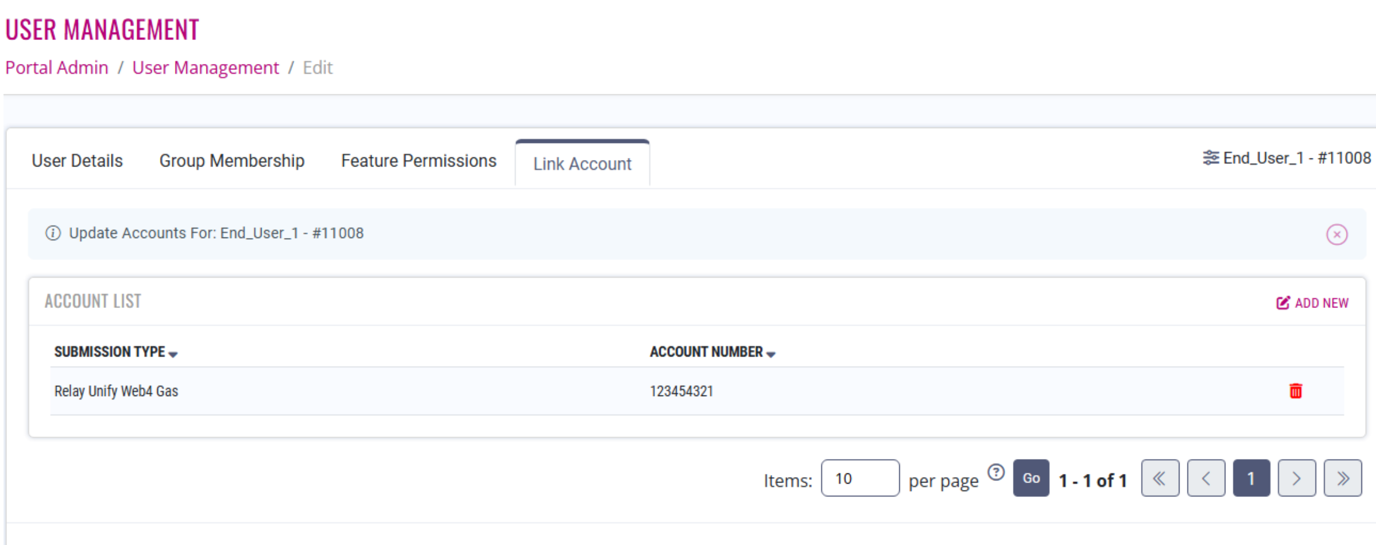
Tips:

If you arent performing validation you won't catch typos, errors, etc. Users may have account numbers added to them but not be able to see documents if the account number is not being validated. If both the name and account number are not being validated you run the risk of users being able to see documents of other users.



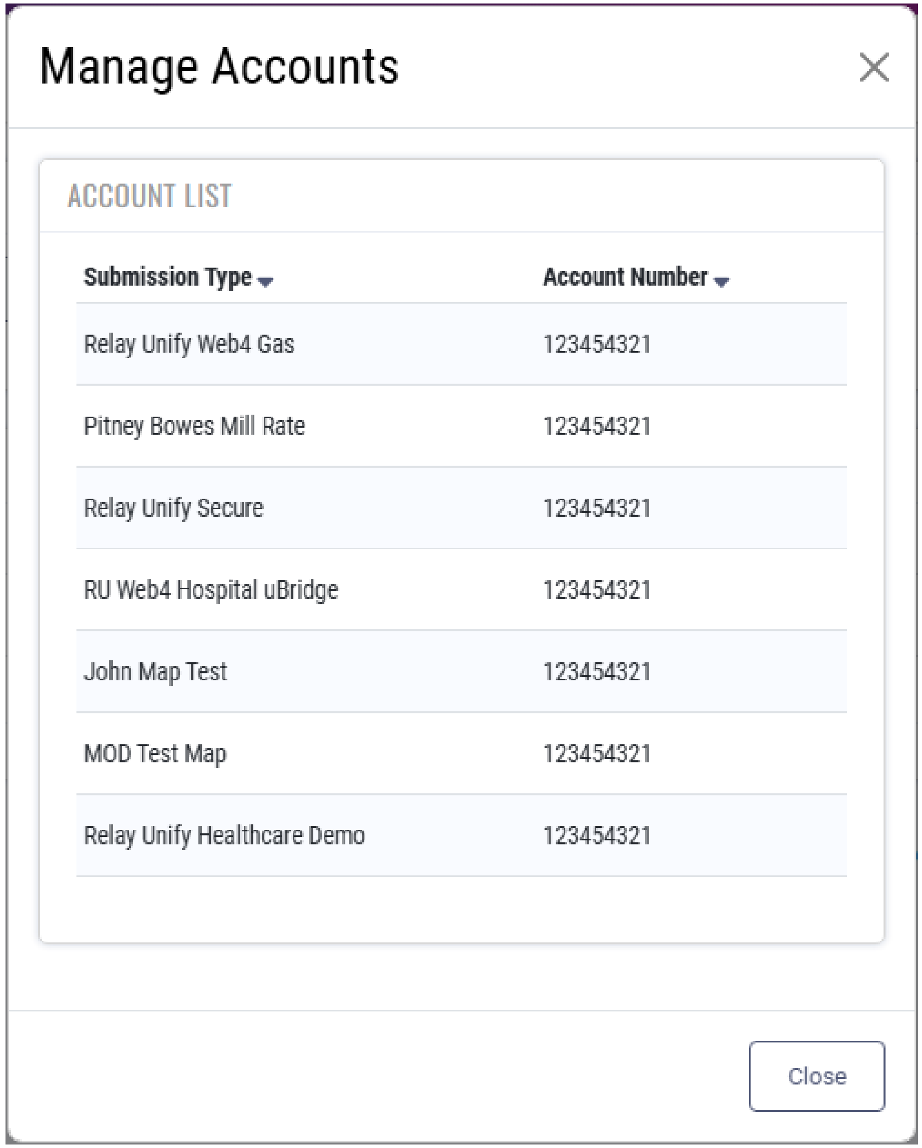
Add User Account to all Submission on login – To navigate to this checkbox, go to End User Settings under Web 4 User Management. When an account number is linked to a user, if this is checked, the user will be linked to that same account number for each submission type under this client. Once this is checked, this setting takes effect for all users on the site, even if set up prior to checking this setting.





A standard user can view the accounts that their username has access to view. The user can login, select their profile, and click Manage Accounts. This will display all of the statements they can view.

The user does not have the ability to edit this list.

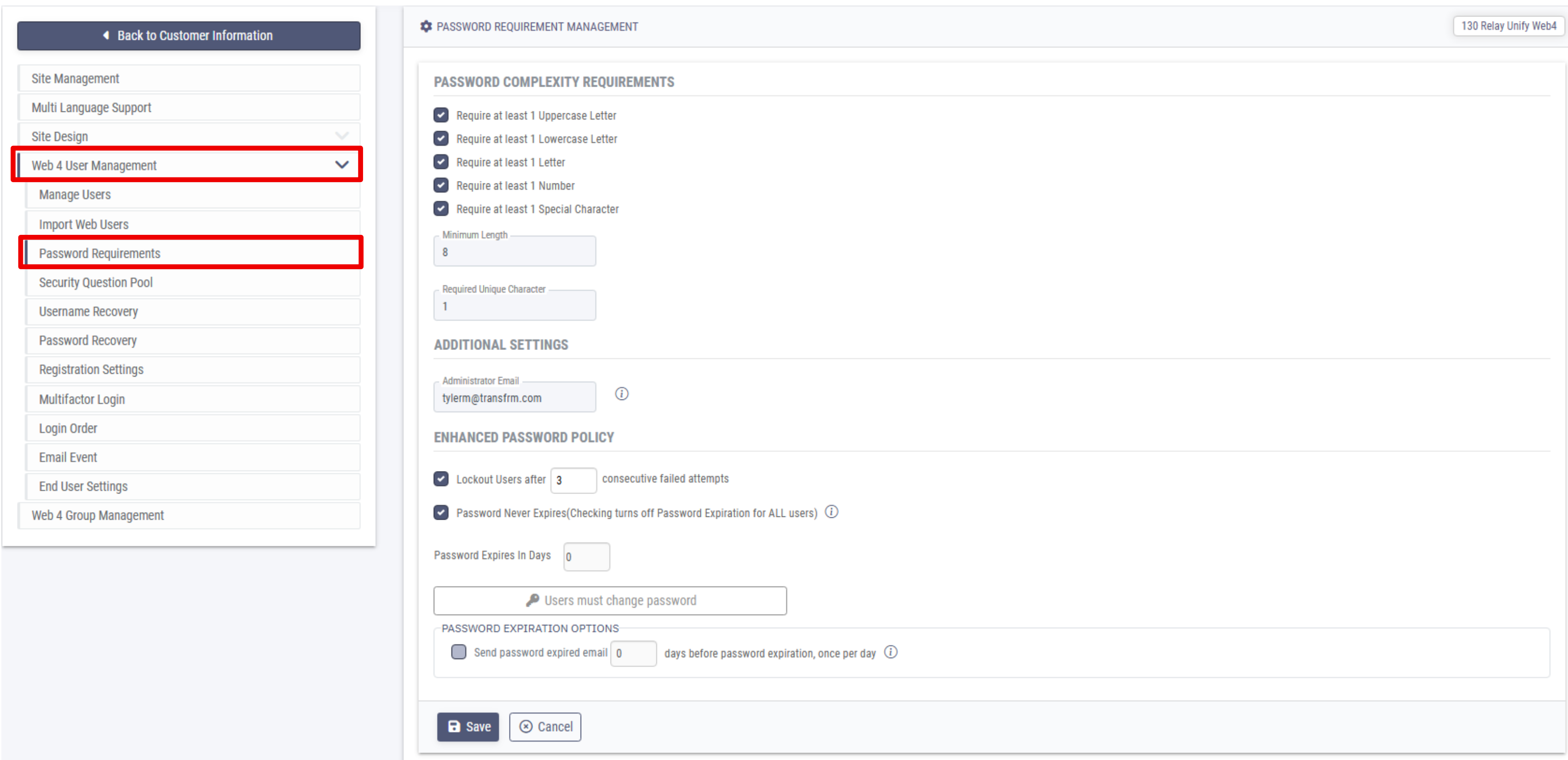


Registration

Password Settings

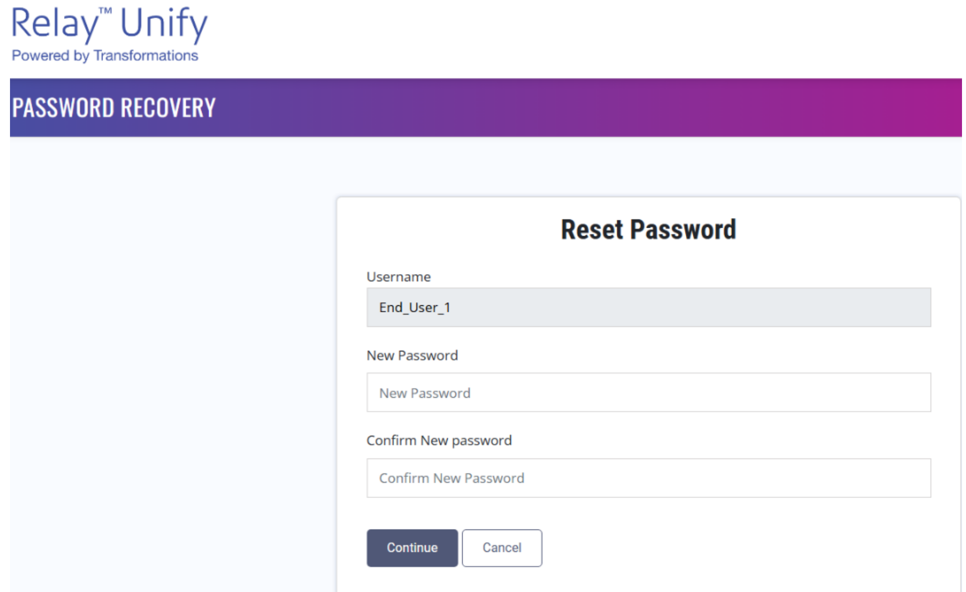
Within uSetup Web, you can require the password to contain uppercase, numbers, letters, special characters, and have a minimum length. The minimum length must be at least 5 characters initially.

When a user is being created, by an admin user or self-registration, the user will only be created once a password that satisfies the criteria is entered.



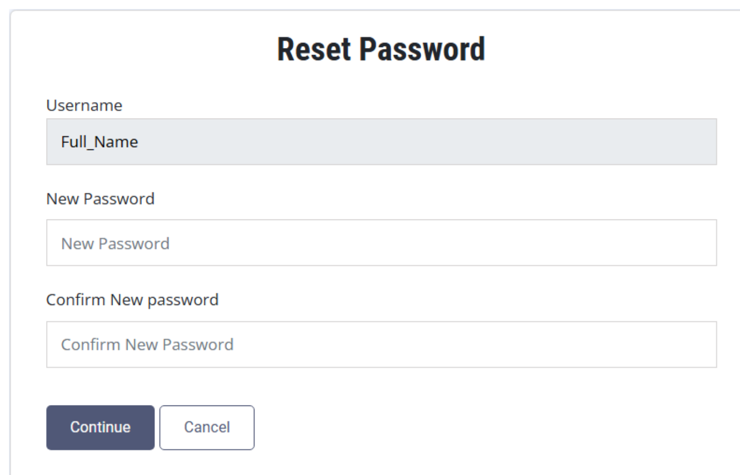
Users must change Password - Changes made on this screen will only effect future users. If you want the password setting changes to effect current users click this button. This will force users to change their password the next time the user logs in to the site.

On the next log in, the user will be redirected to this screen:



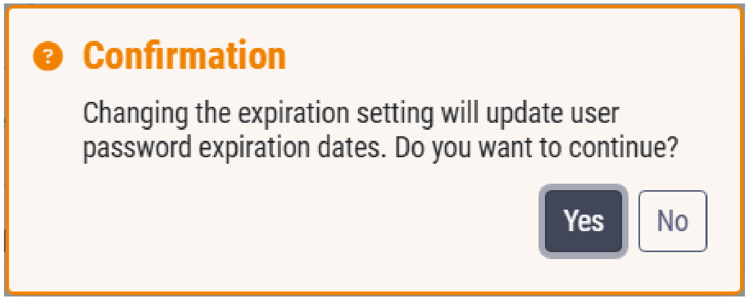
Password Expires in Days – Enter the number of days for the password before it expires. Once it is expired, the user will be prompted to change it at the next login attempt.

If the password has expired, the next time the user logs in, the user will be directed to reset their password:



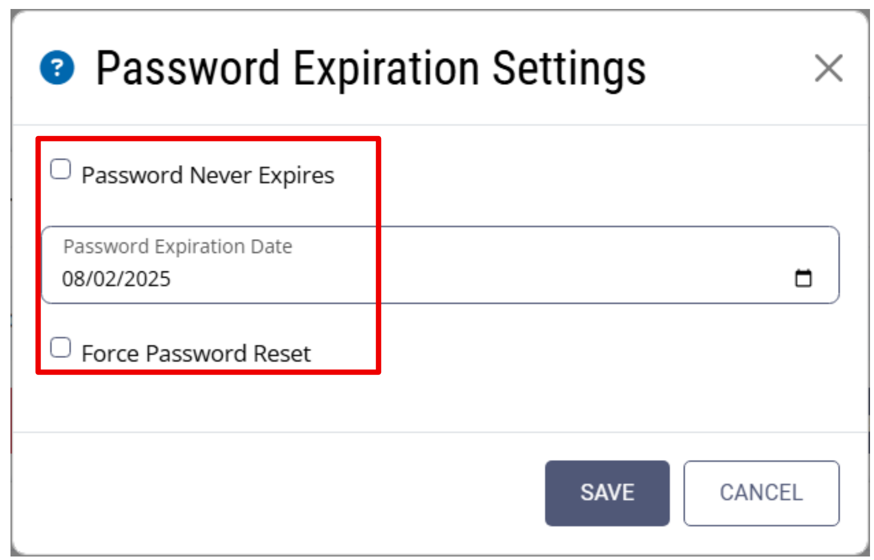
Password Never Expires – If this is checked, it will globally override the password expiration date of all web users. If a user's password expired yesterday and they login today, the user will not be prompted to change their password.

If never expire was checked and is then unchecked, before you save you will be asked 1 question:



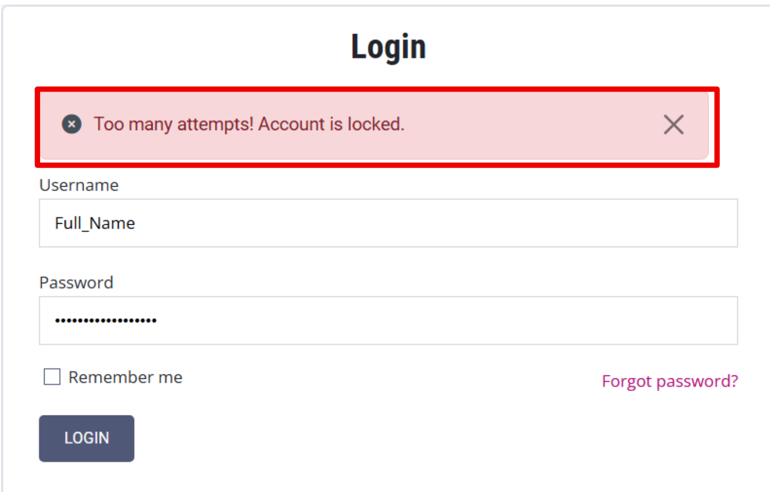
Admin can verify a password expiration date or manually adjust the password settings for individual users. The admin user can go to Manage Users and select a user. Under Manage Password & Email settings the admin can:

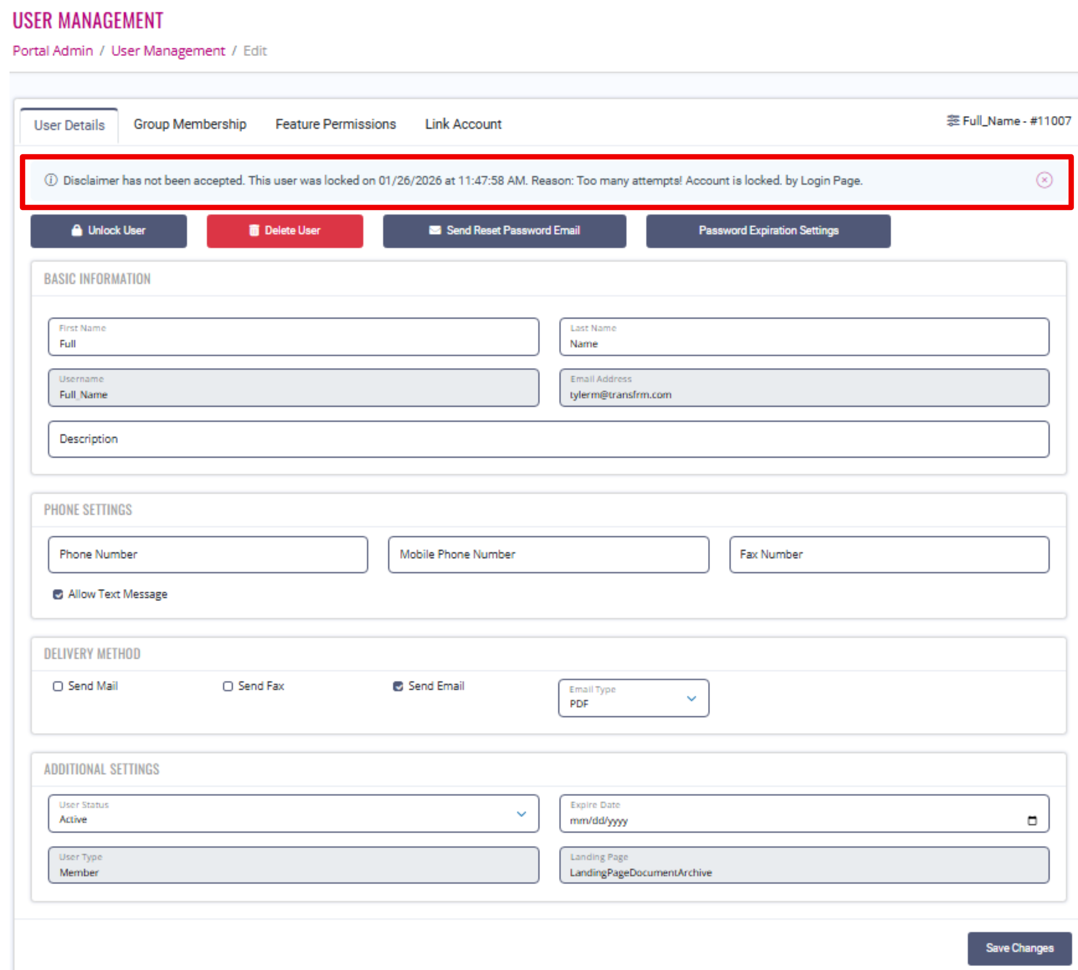
- Password Never Expires – The password of this user will never expire.
- If the password has an expiration date that has been set it will be listed and can be changed for this user.
- Force Password Reset – If this is checked, the next time this user logs into the site, the user will be prompted to reset their password. (This does not trigger the reset password email.).



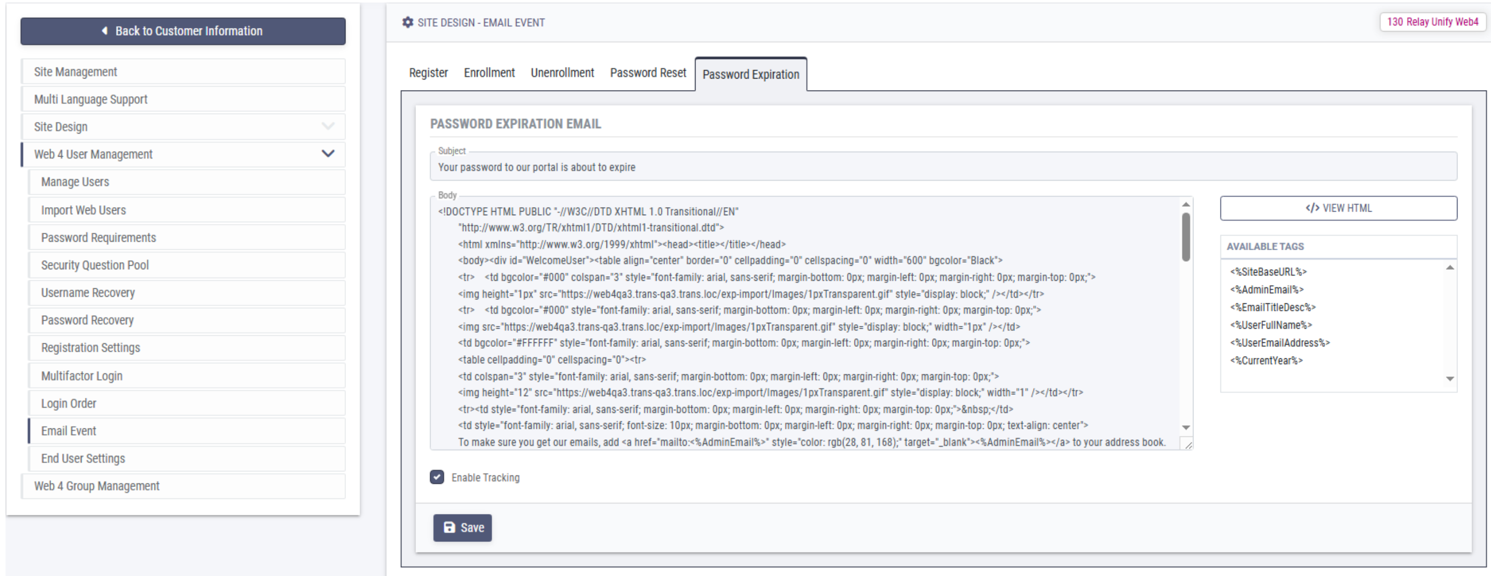
Enhanced Password Policy – This feature is automatically turned enabled, and gives you the ability to reset user passwords and lock users out, etc.

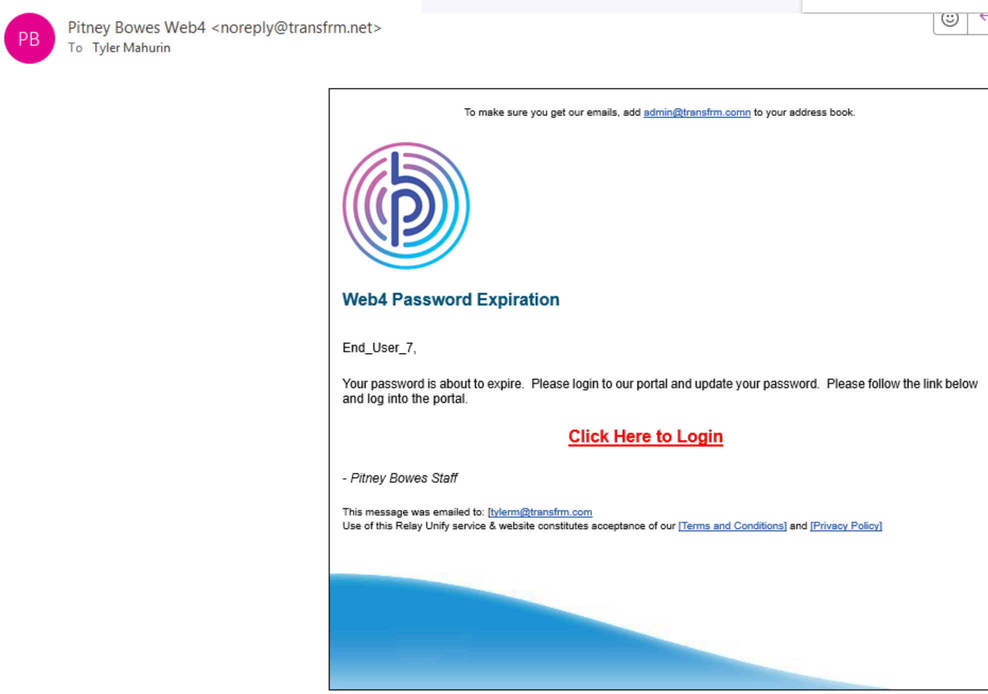
Lockout Users after n failed attempts – Enabling this feature will lock out users that fail to enter their password correctly n consecutive times. Set the value to the number of consecutive failures.
This is different from before since it was hard coded at 5 and now it can be any number.





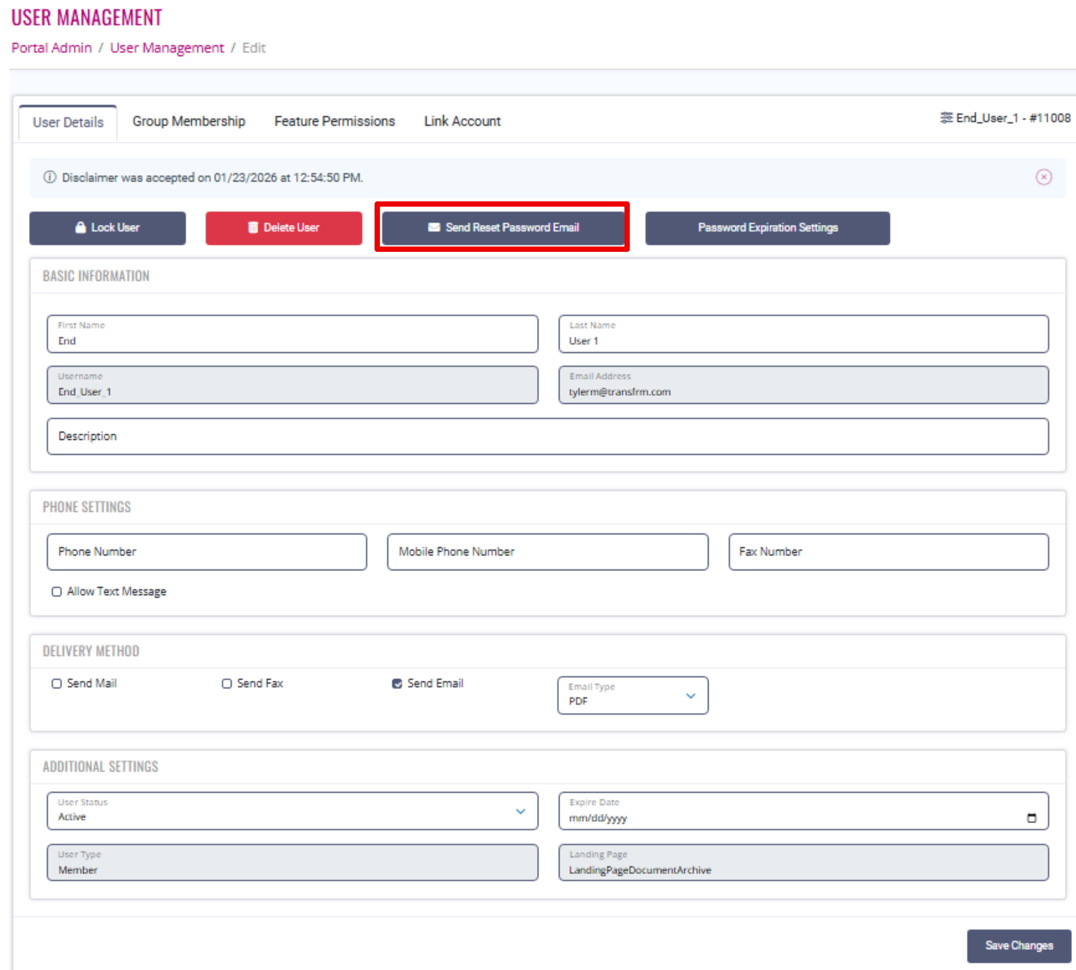
Send password expired email – Enabling this feature will send password expiration emails starting n number of days before expiration and will continue to send an email each day until the password is updated or the password expires.



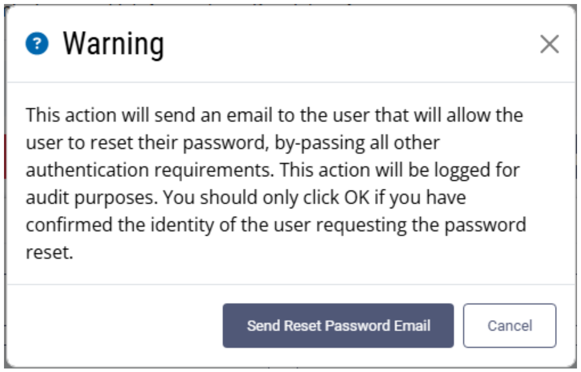


Reset User Password

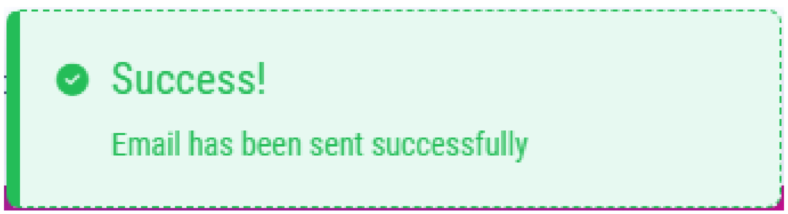
Under User Management, select the user that needs a password reset. Click Send Reset Password Email at the top.



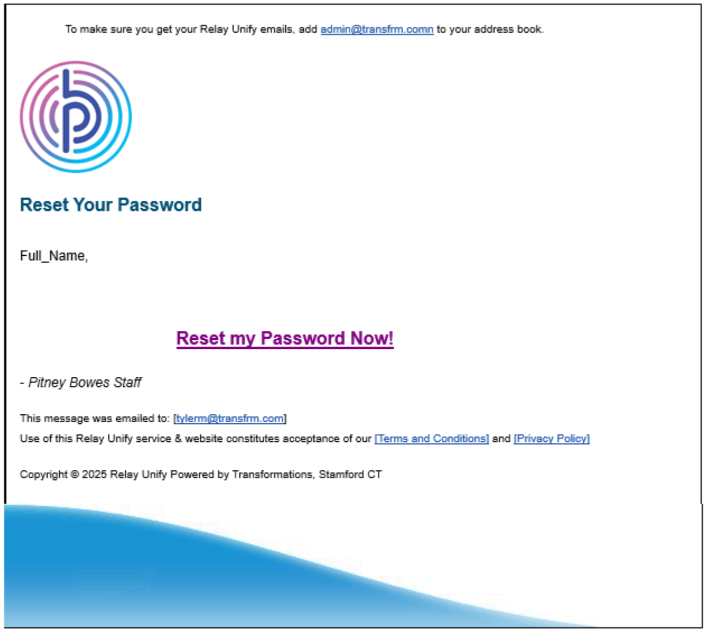
If the user has not logged in and accepted the disclaimer, the admin will get this notification.

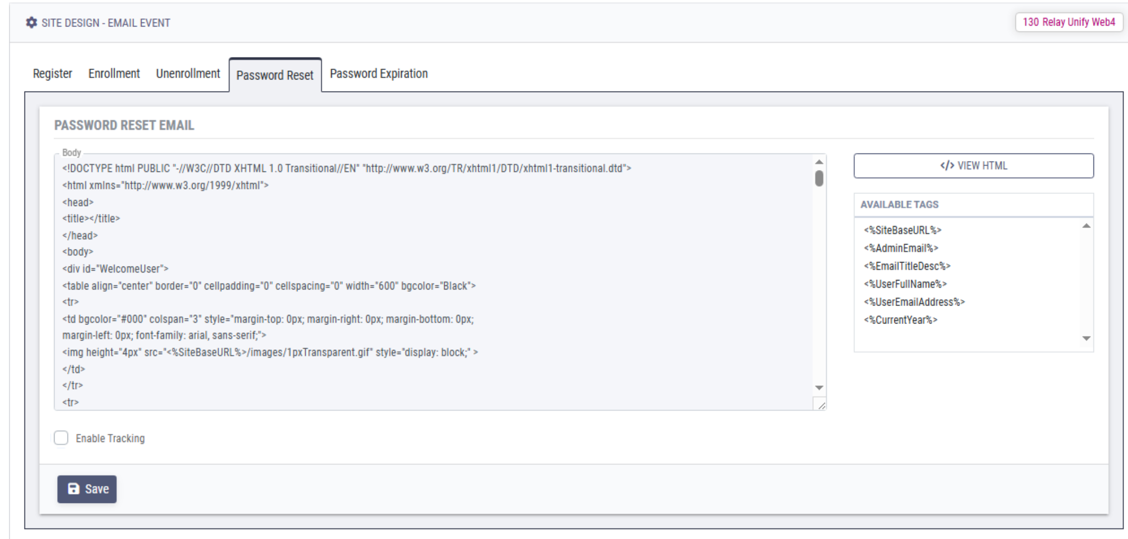


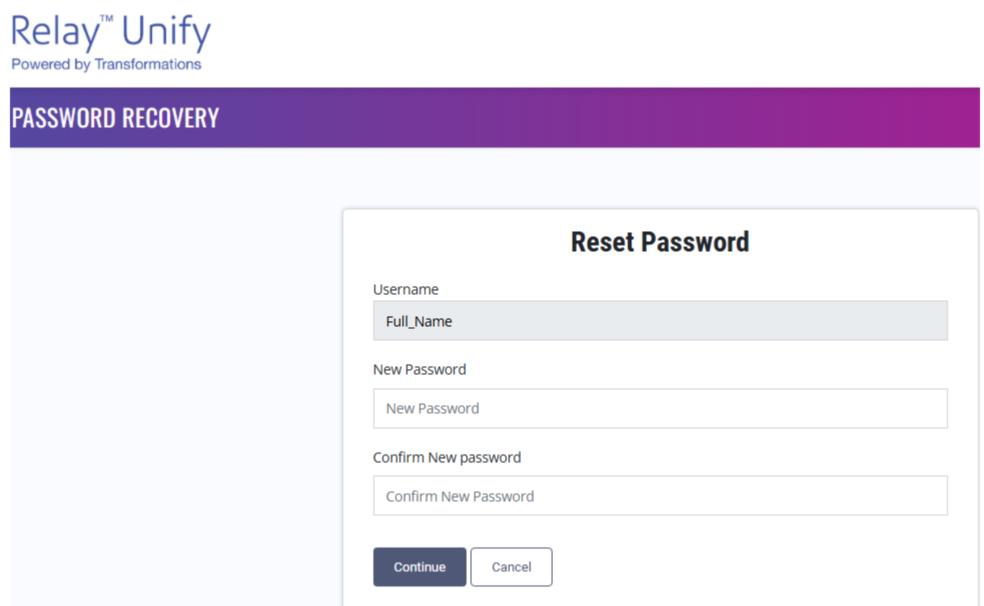
After you click Send Reset Password Email, you will get a Success notification.



An email will be sent with a link to Reset their password. This email is set up in uSetup Web under the Web 4 User Management tab and click on the Email Event Tab.







The link takes a user to this page:

If the user that you reset the password for logs into the site prior to resetting their password, they will be redirected to the same page the link in the email takes them to.

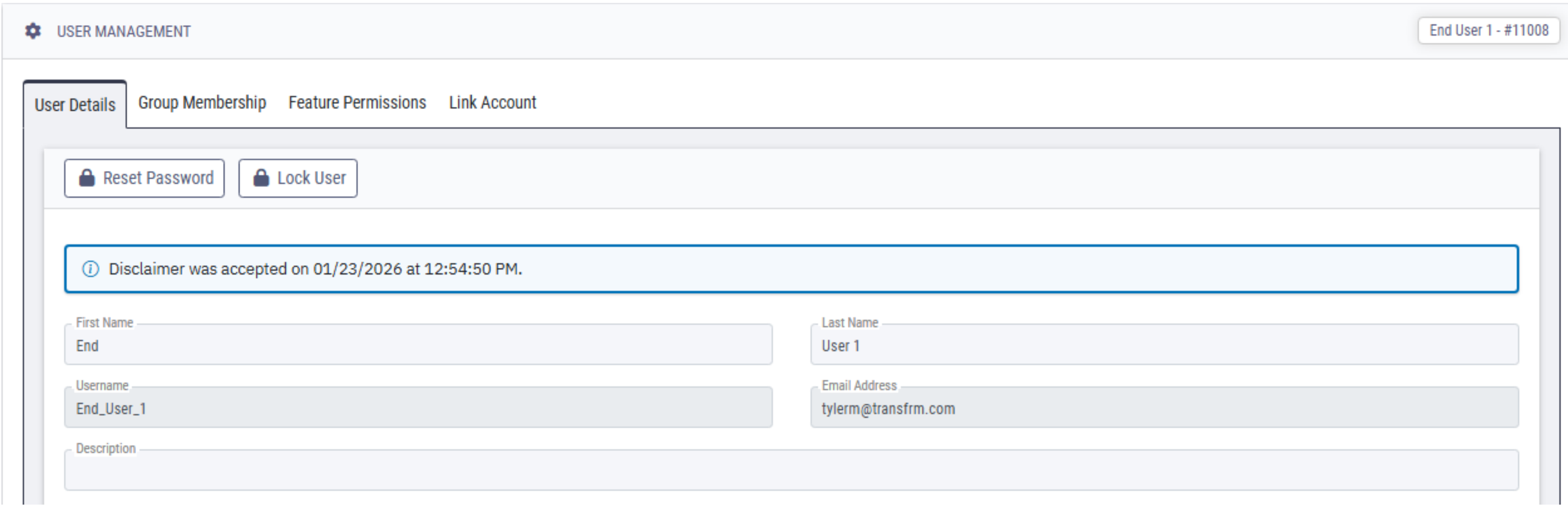
Tips:

Only an admin has the capability to reset a password for any user. Users can change their passwords but not reset them.

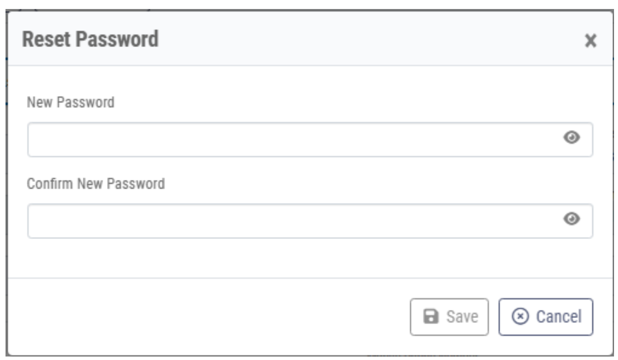
Change Password

Admin

Admins have the capability to manually change a password for any user. Within the uSetup Web, the Manage Users tab lists all users for that site. Click on a user and select Reset Password.



You will be able to enter the new password:



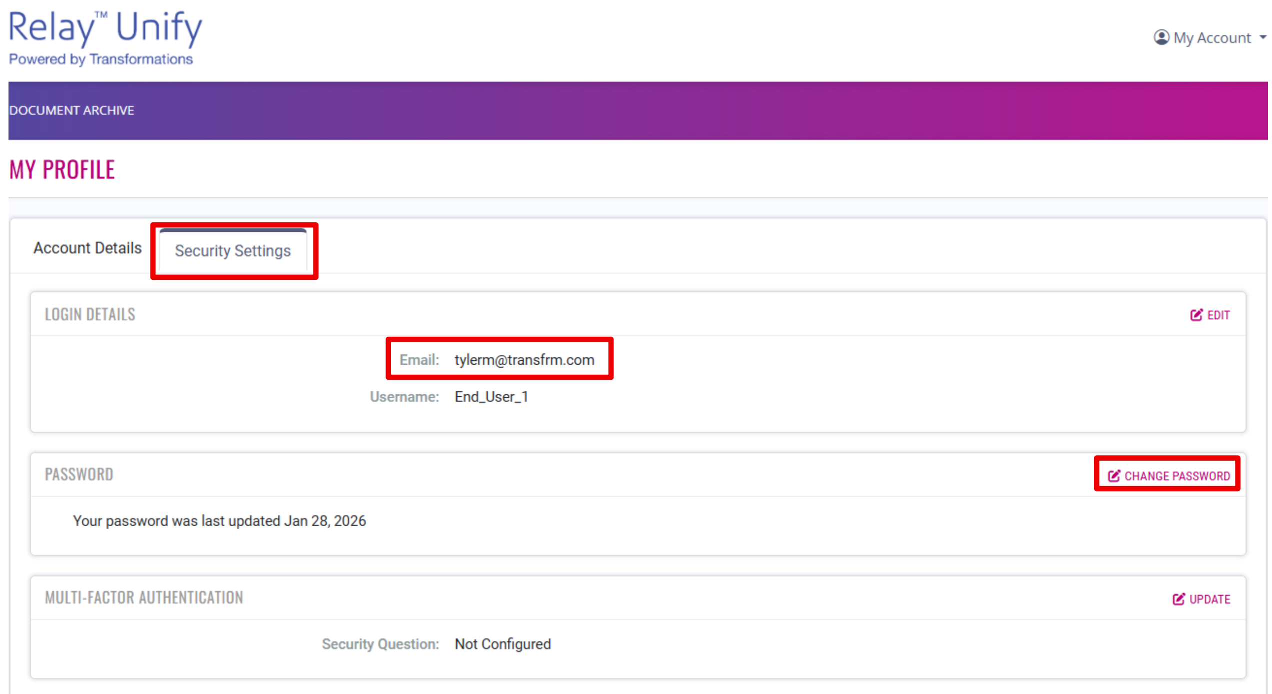
This password also has to follow the rules set for password requirements.

All Users

Users can change their password by clicking My Account, then Manage Profile > Security Settings Tab > Change Password button.

The user will enter a new password. It must meet the password settings within the uSetup Web for the site.

This is also where a user can edit the email address on the account under the Login Detail section of the Security Settings Tab.

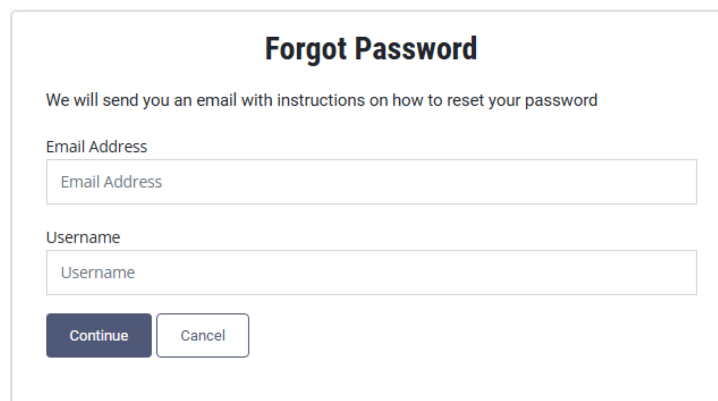


Forgot Password

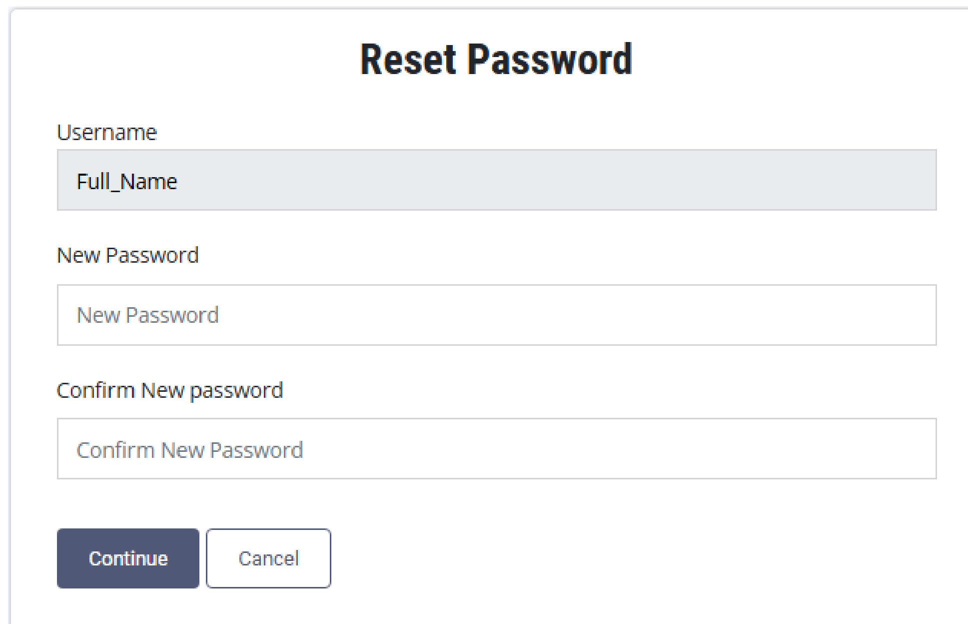
If a user clicks the Forgot Password link below the login area on the main site, they will be directed to this page.

This is only possible for all users. Although Admin and CSR users don't have account numbers, if an email address is linked to the account, you will receive an email with steps to change the password.

Reset PW – Forgot PW on home screen or by admin resetting PW…you will get an email to reset your PW – you will need your email address and username to do so.



An email will be sent with a link to Reset their password. This email is set up in uSetup Web under the Web 4 User Management Dropdown > Email Event Tab > Password Reset Tab.



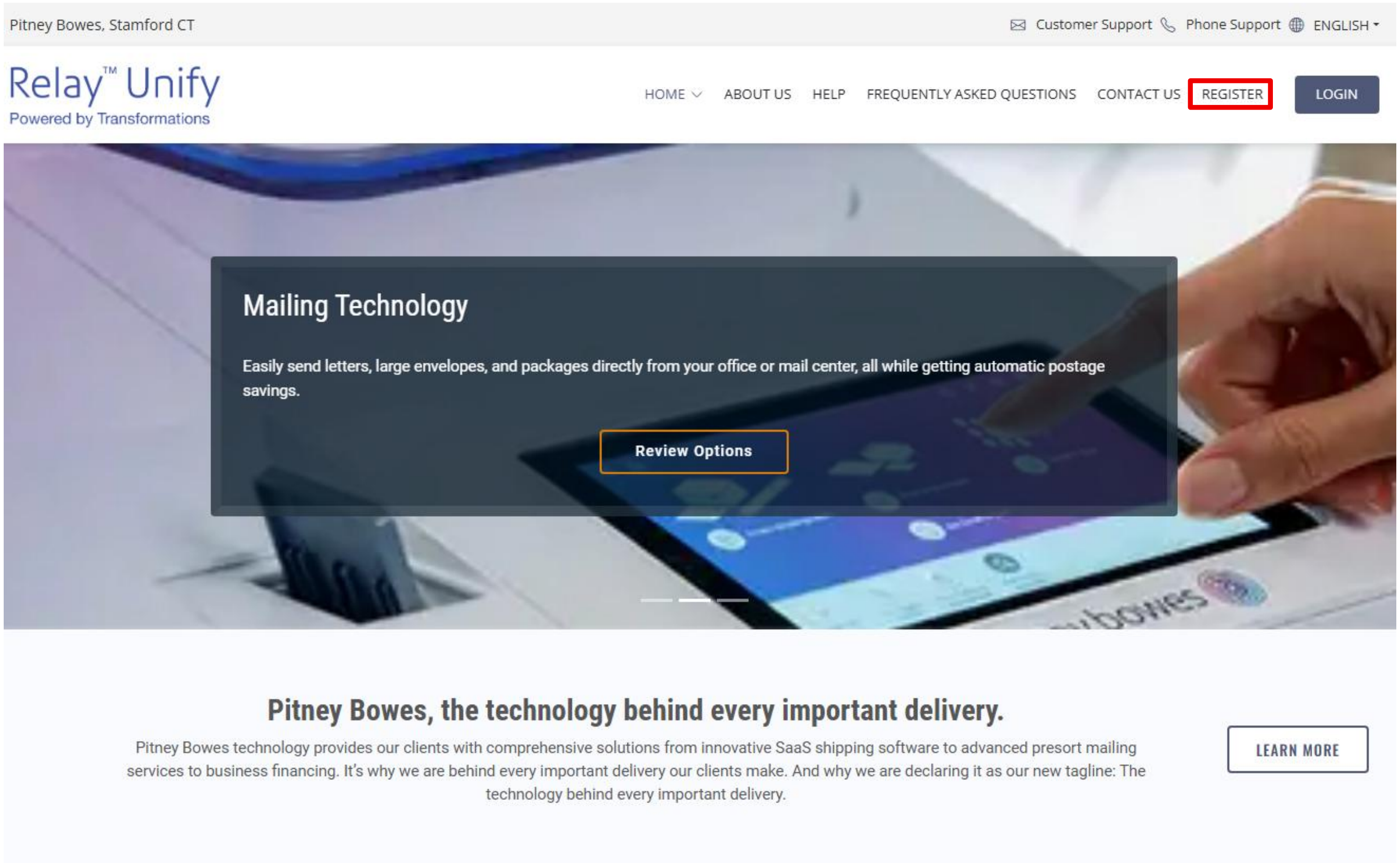
The link in the email will direct the user to reset their password. This is the same email and page if an admin resets a user's password.

The user will then enter in their new password and confirm new password. The password must meet the password settings determined in web uSetup Web.

Once the user clicks Continue, the new password will take effect.

Self-Registration

On home login page to the site, click REGISTER from the links across the top.



This will direct the user to the New Registration Page. This is the default. It can be edited using the Registration Settings within uSetup Web. This is how an end user would register. This is not designed by default for a CSR user or admin user to self-register.

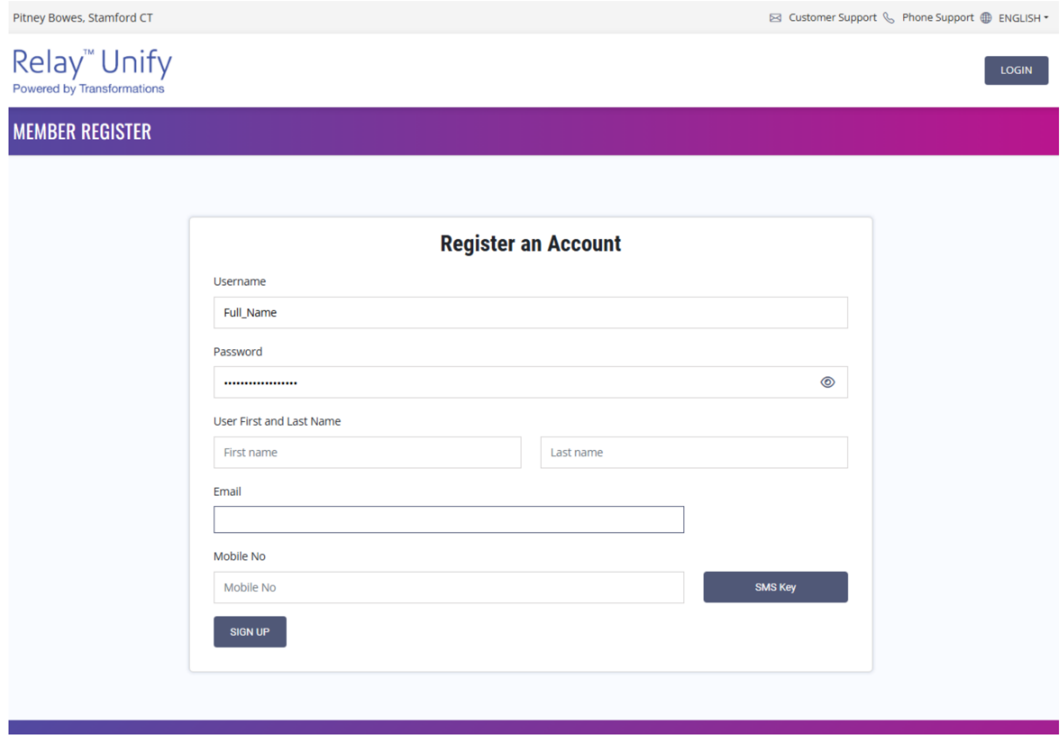
Username – The user can enter a desired username for logging into the site.

Password – The user can set their desired password for logging in to their account.

First/Last Name – The name on the statement.

Mobile No/SMS Key – The user will enter an active mobile number in which they will receive an SMS Key to enter before registering.

If the Name entered does not match a document for this site/client, the user can register but will not see a document until it is entered on the site.



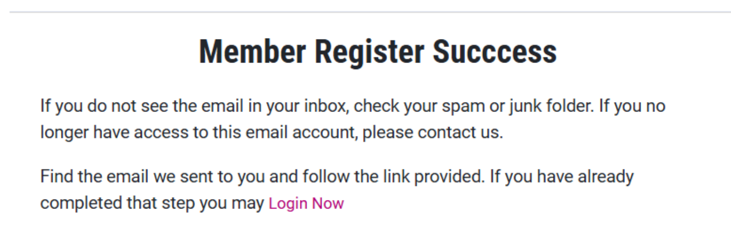
Tips:

The Name entered must match a document. If there is no record of that name as part of any submission type for this client, the user will not see a document until it is entered on the site. ***Prefixes, capitalization, etc. must be specific to the way the name is displyed on the statement.***

Email Address – This will be the email address the registration email is sent to and will be saved as the primary email on the account.

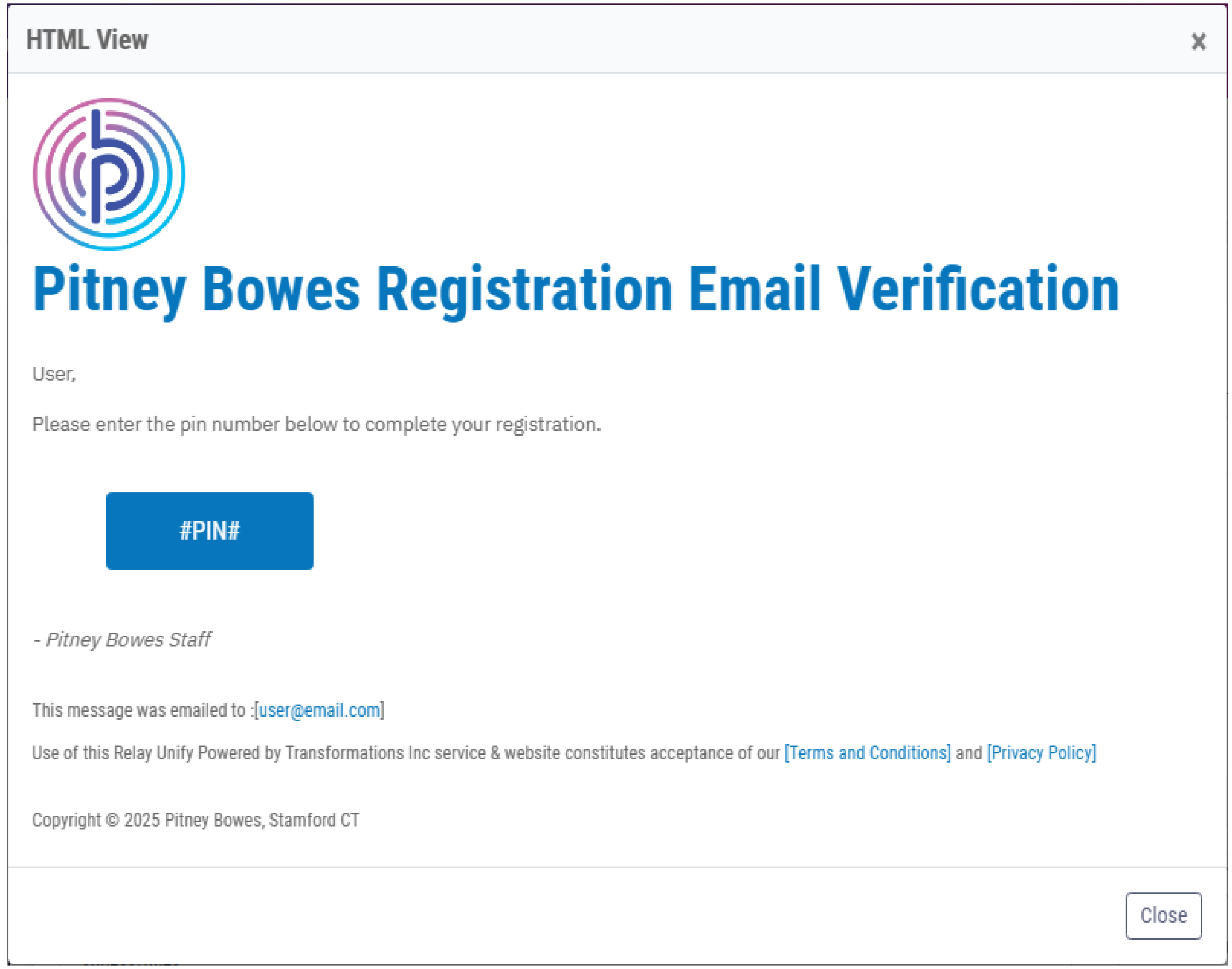
Email Key – This key must be delivered to a valid email address to move forward with the self registration after entering the pin that is emailed to the account user. Once the email address has been verified, the user can click on "Sign Up" to get their account started.

Once the user has entered their information they will get this notification:



The user will receive an email with further instructions to activate the account. At this point, the user is already active. The user can now log in to the site and edit the account information.

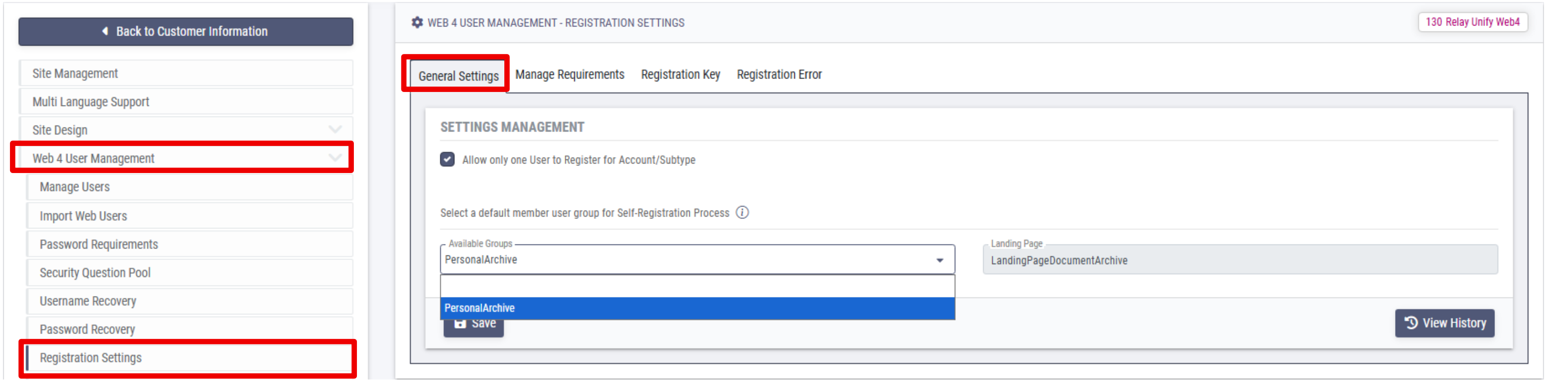
This email is set up in uSetup Web under the Web 4 User Management Dropdown > Registration Settings Tab > Registration Key Tab at the top.



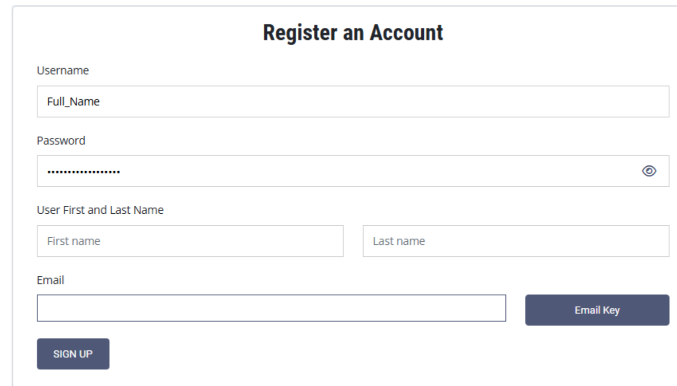
Registration Settings/ Password Recovery

These tabs can be used to:

- Customize the Registration page for standard users.
- Select the landing page the end user will go to.
- Manage the keys needed for registration and password recovery.



These tabs are located in the uSetup Web under the Web 4 User Management Dropdown. Click on the Registration Settings Tab, or the Password Recovery Tab.



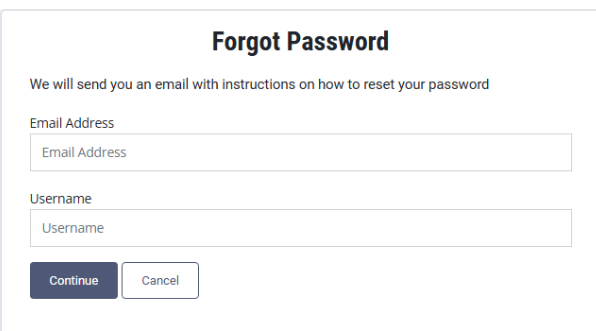
Registration

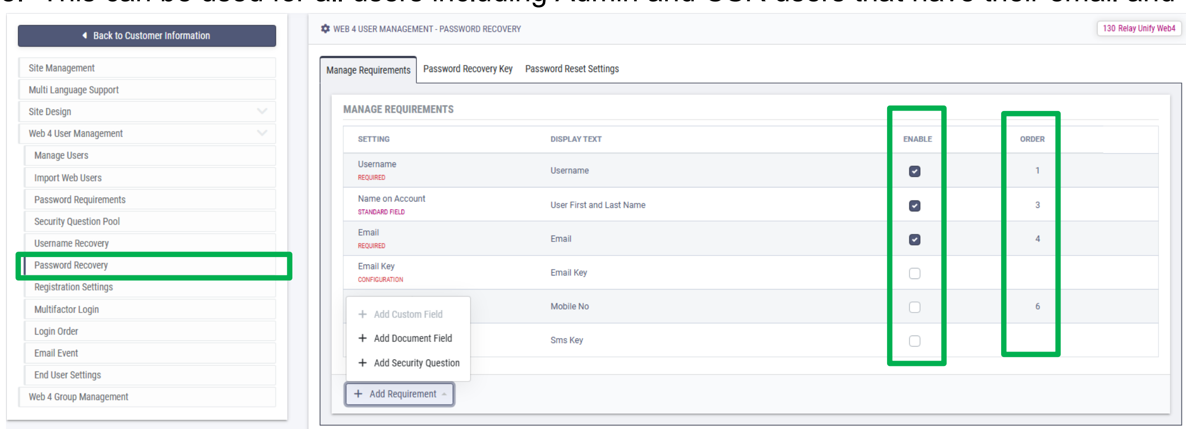
By default the registration page will appear like this if a user clicks the Register link on the main page of the website.

If you would like to chage any of the requirements for a new user to self-register, click the Manage Requirements Tab at the top.

Password Recovery

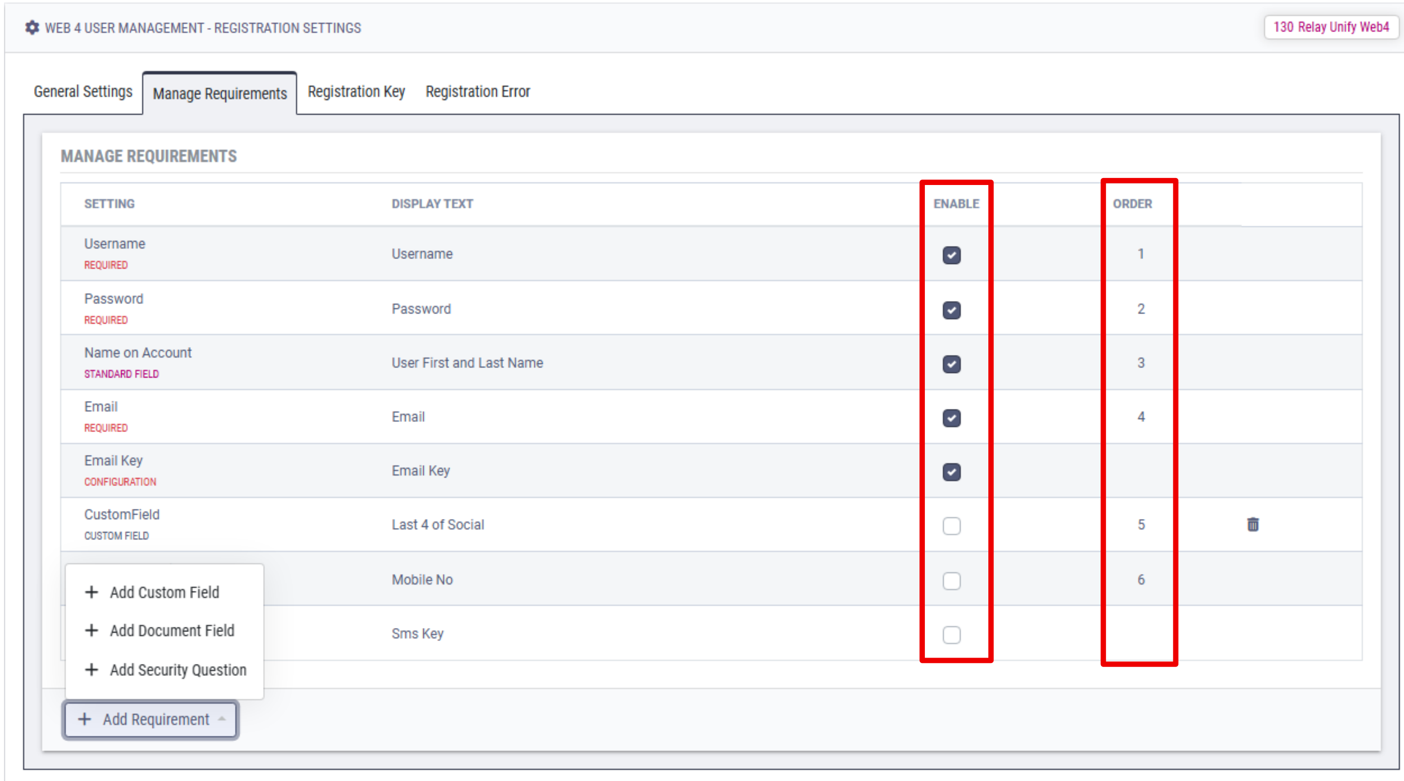
By default the forgot password link takes you to this page. This can be used for all users including Admin and CSR users that have their email and names registered on the site.





Enable for Registration – Check this for the changes to take effect on the Register page.

Enable for Password Recovery – Check this for the changes to take effect on the page that the forgot password link directs a user to in order to retrieve their password.



All of the settings here are set up the same for registration and password recovery, but on the different tabs.

Required for User Registration – The entries set up under this heading will be displayed on the registration page that standard users will use to register. The standard fields will be required.

Required for User PW Recovery – The entries set up under this heading will be displayed on the password recovery page that standard users will be directed to after clicking Forgot Password on the main site and entering their username. The standard fields will be required.

Display Text – This will be the text that appears above each field on the Registration or Password Recovery page.

Order – This is the order that the items are displayed on the registration page depending on the numbers entered in the order slot.

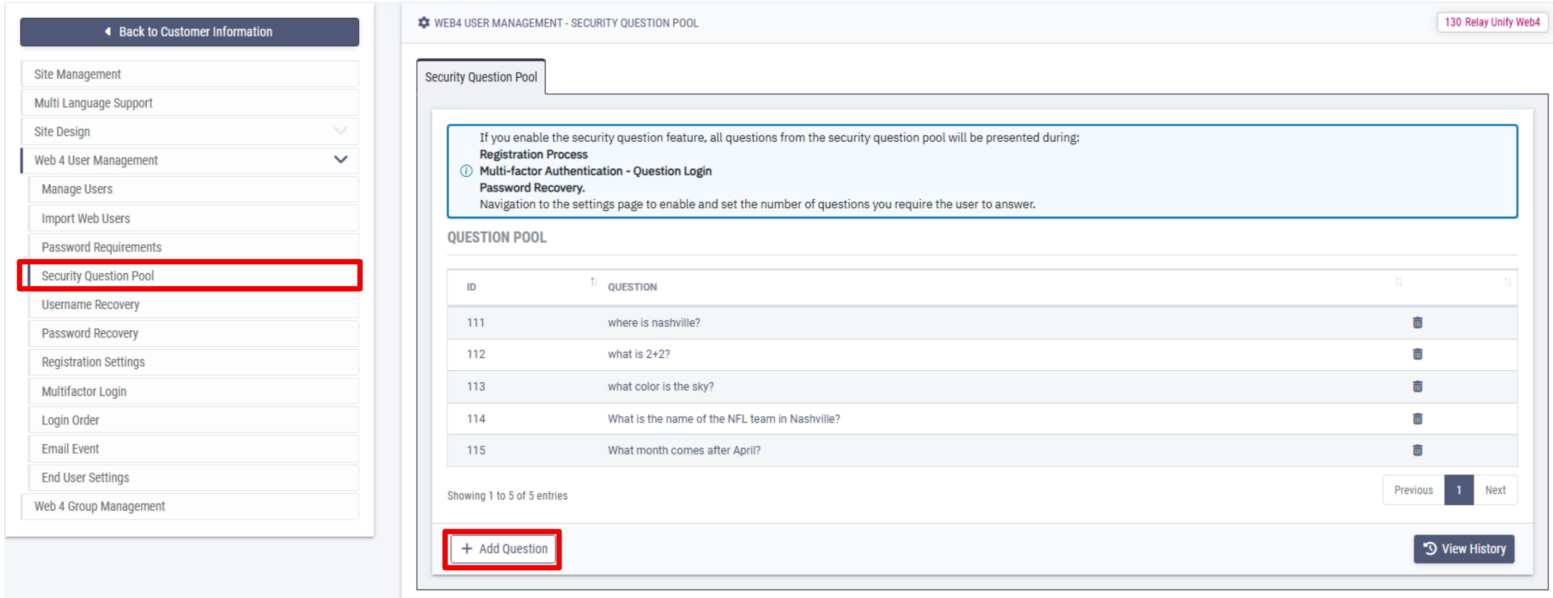
In addition, you can require security questions, document fields, and custom fields. You can only enable standard fields, or disable them. If you create a new field to add, it will have a red trash can to delete it if needed.

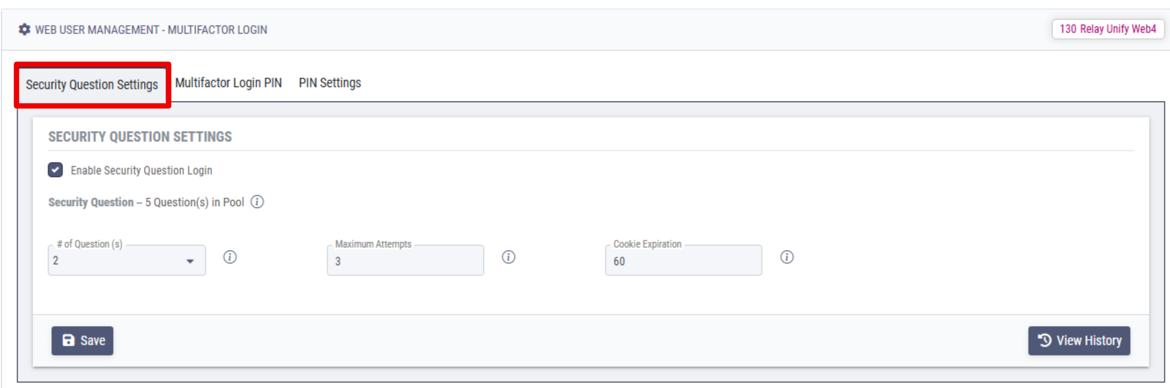
Security Questions

Click the + Add Questions button to create the questions that will be asked of users during registration or password recovery.

Once created, you can click Save to add it to the pool.

Required for Registration/Password Recovery – The questions set up here will be asked during the Registration Process, for Multi-factor Process, for Multi-factor Authentication Login, and Password Recovery.





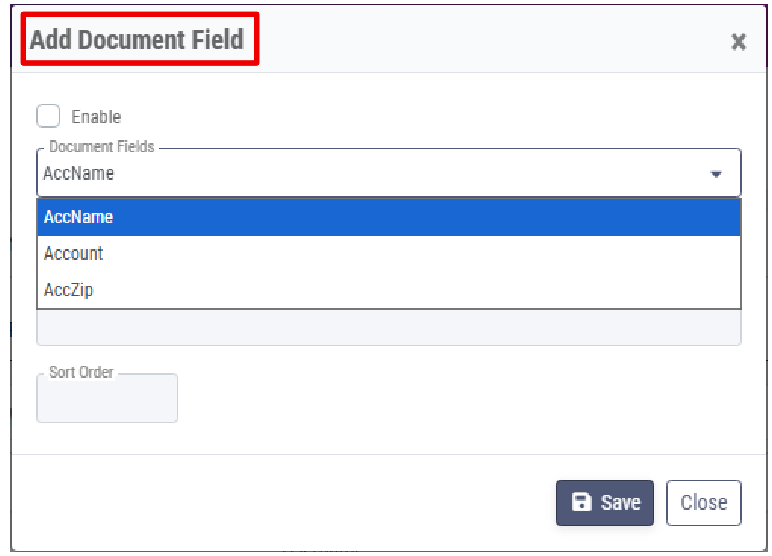
The number of questions set up in the security question pool does not determine the amount of questions asked in any of the 3 areas mentioned above. The number of questions asked for any of the 3 areas above is set up in the Security Questions Settings Tab of the Multifactor Login Tab under Web 4 User Management Dropdown.

Tips:

The number of questions enabled here will be in a pool the user can choose to answer. The security question pool will be a dropdown menu of all of the security questions that have been created.

Document Fields

Click the + Add Requirement button to create the fields that are found on the document that will be asked of users during registraion or password recovery.



Require for User Registration – This will add the field to the list of items a user must enter during New Registration. It will appear in the order you enter here.

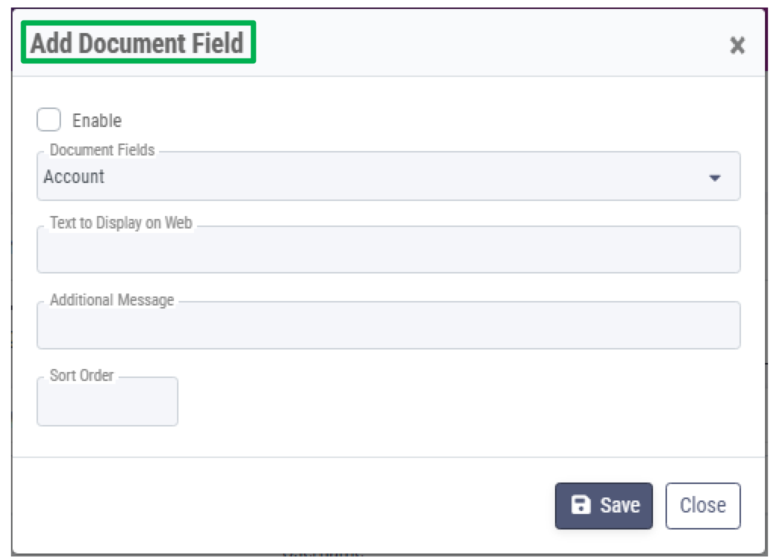
Require for User Password Recovery - This will add the field to the list of items a user must enter to retrieve their password. It will appear in the order you enter here.

Document Field – This is a mapped field that is displayed on the document.

Tips:

This must be a field that is created in the map. It can come from the data. It is for information that a user would have on the document.

If the Document fields for Account Name and Account Number are enabled for Password Verification, both will need to be enabled, to neither; if only one is enabled users will not be able to reset their Password.



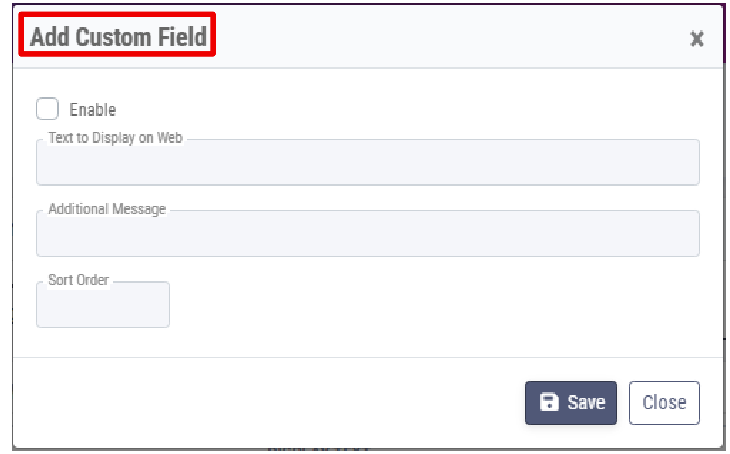
Text to Display on Web – This will be the text that appears above each field on the Registration or Password Recovery page.

Additional Message – This is the text that will appear in the text box displayed on the web. It will be lighter than the text to display on web.

Sort Order – This is the order that the items are displayed on the page depending on the numbers entered in the order slot. If two items have the same number, it will list them in the order they appear on this screen from top to bottom.

Custom Field

Click the + Add Requirement button to create a custom field. This can be anything.



Require for User Registration – This will add the field to the list of items a user must enter during New Registration. It will appear in the order you enter here.

Text to Display on Web – This will be the text that appears above each field on the Registration page.

Additional Message – This is the text that will appear in the text box displayed on the web. It will be lighter than the text to display on web.

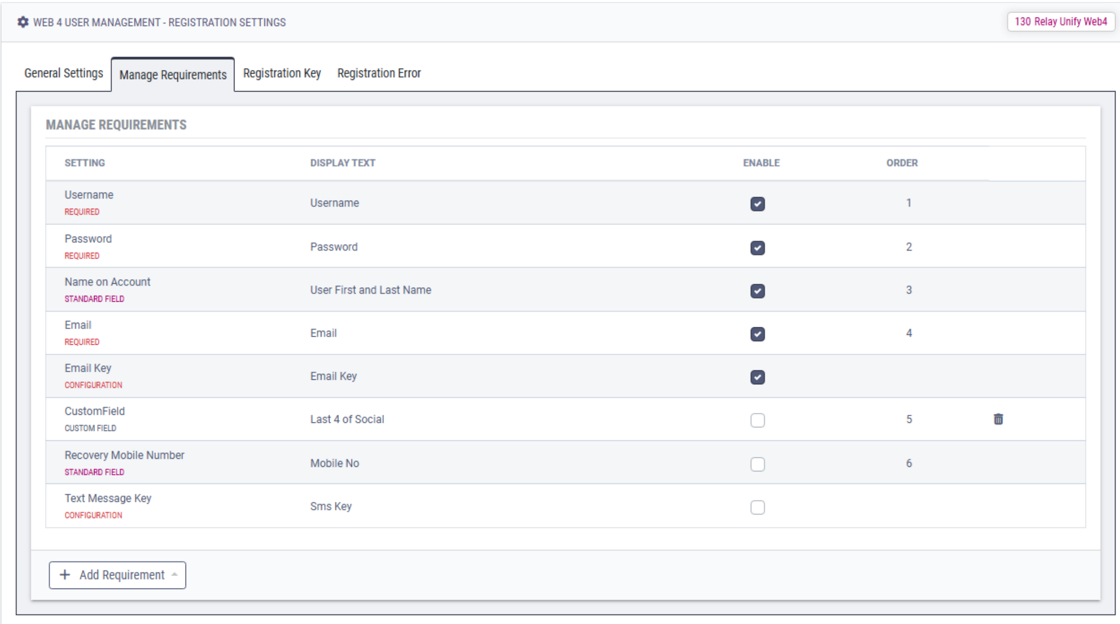
Sort Order – This is the order that the items are displayed on the page depending on the numbers entered in the order slot. If two items have the same number, it will list them in the order they appear on this screen from top to bottom.

Custom Fields can only be added to the Registration Settings section, not as a Password Recovery field.

Tips:

The settings for Registration Settings/Password Recovery do not effect how an admin creates a new user under User Management on the admin home page. These settings will not take effect until the user created logs into the site. Upon logging on, the user must answer these questions/fields.

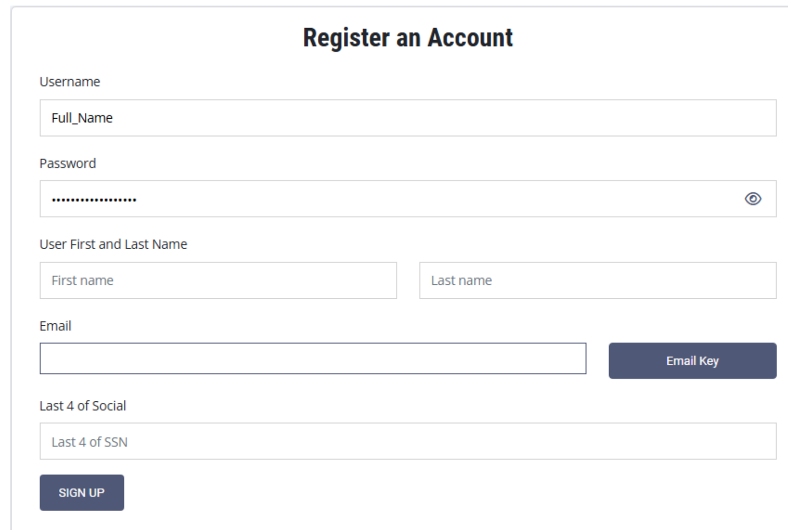
Sample:



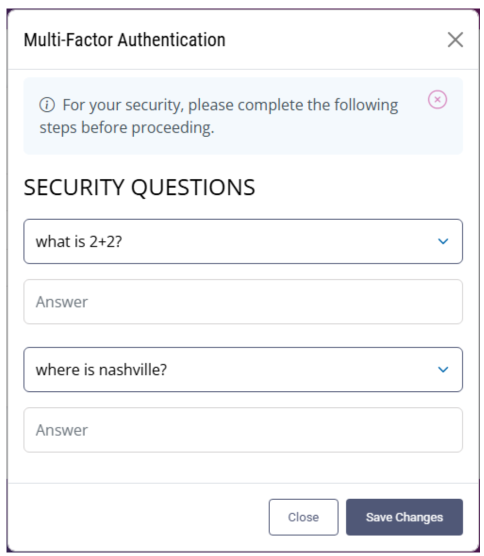
Tips:

The account number and full name entered must match a document. If there is no record of that name/acct # as part of any submission type for this client, the user will not be able to register. ***Prefixes, capitalization, etc. must be specific to the way the name is displayed on the statement.***

Mobile number validation removes characters and then verifies it is more than 5 characters to allow for all countries.



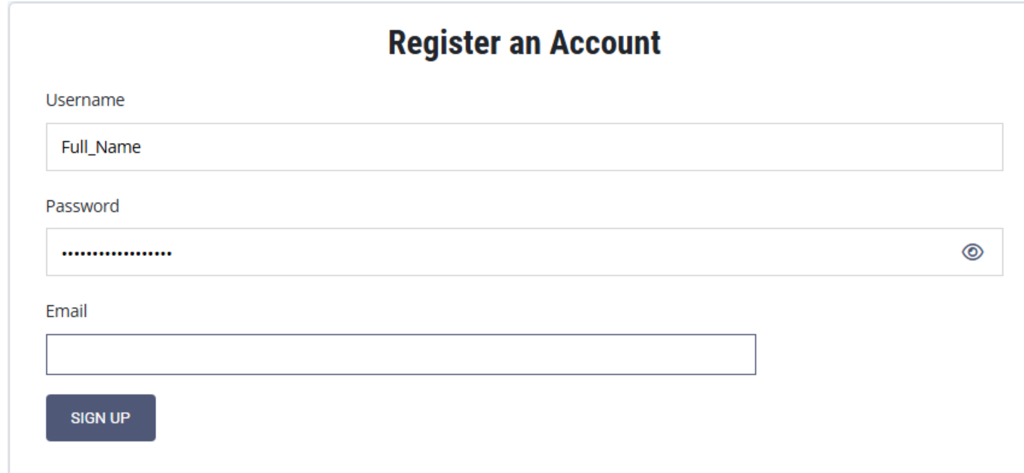
Only the number of questions enabled specifically for registration will be asked at this point. The user can choose from all the questions created using the dropdown. The ones that the user does not select here will be asked upon the initial login to the site.

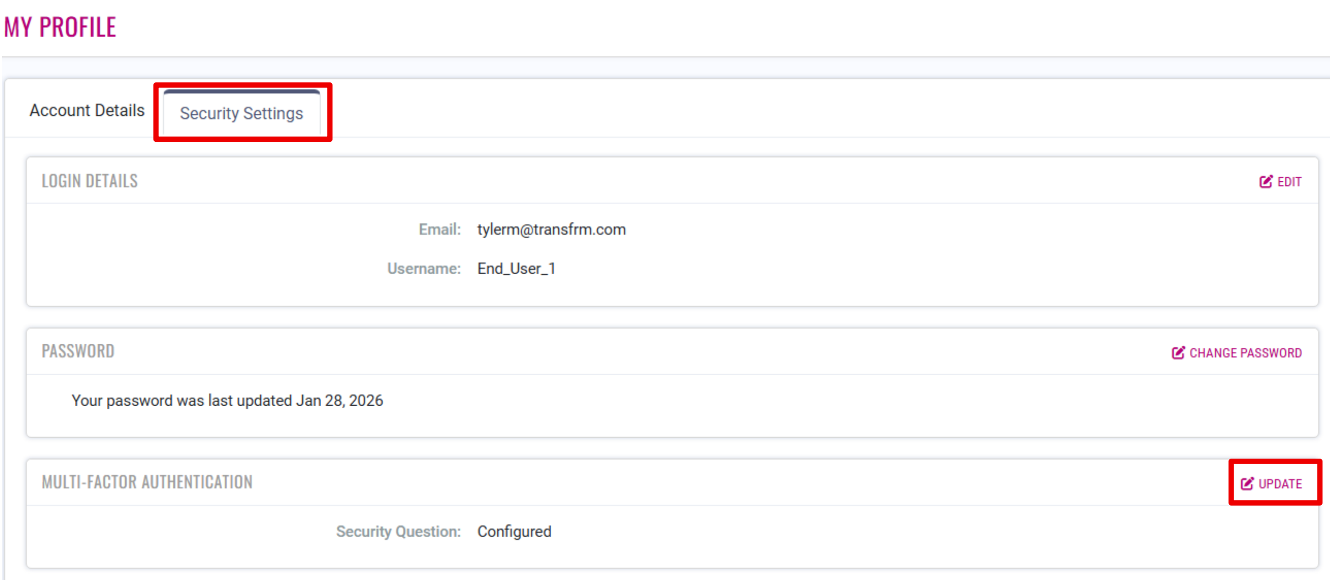


Once the user completes New Registration and/or enters a key the user is Active; there is no registration email sent to users.

If a setting has been changed, or the user was created by an admin manually, the registration window will look different for the next user to register with.

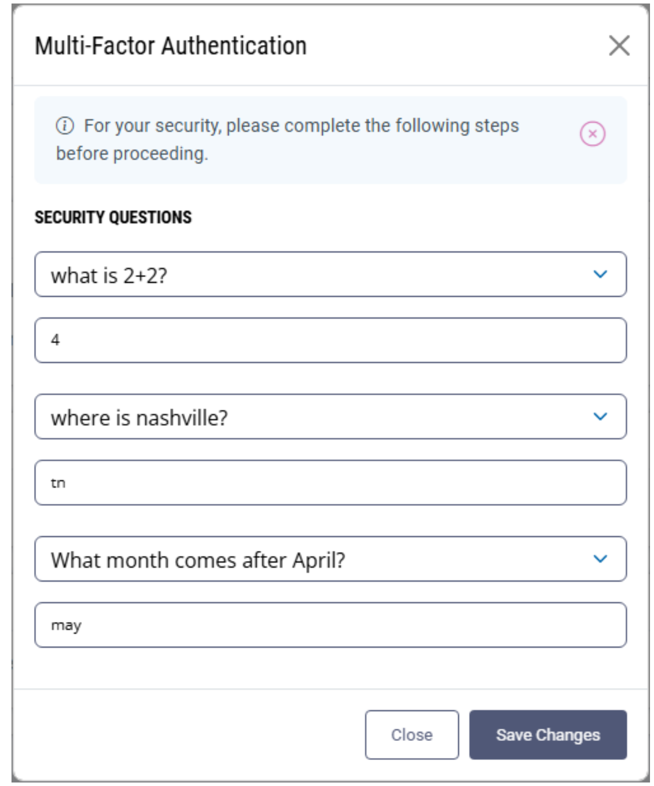
Example:

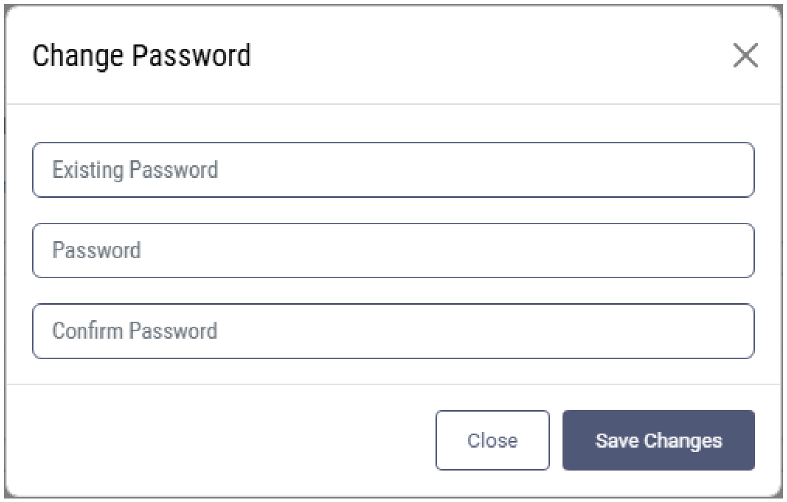




Users can edit the answers to the fields/questions for Verification. Under a user's profile, the user can click Security Settings Tab.

This allows a user to edit the answers to the security questions as well as the ability to change their Password.



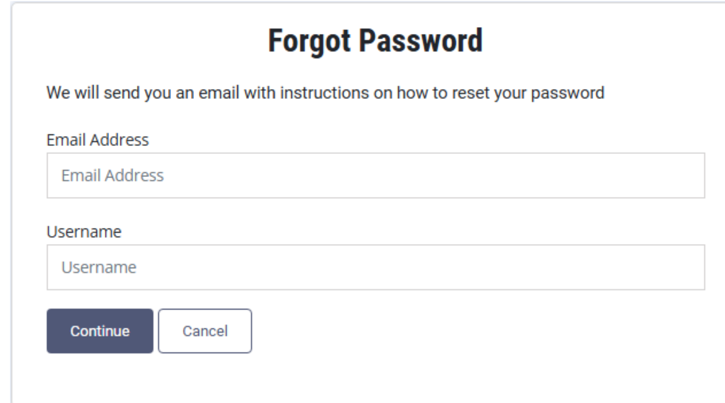


Tips:

The recovery fields are not linked to the same fields in the database as the profile fields. The text displayed for registration can be anything so there is no way to link the profile and recovery.

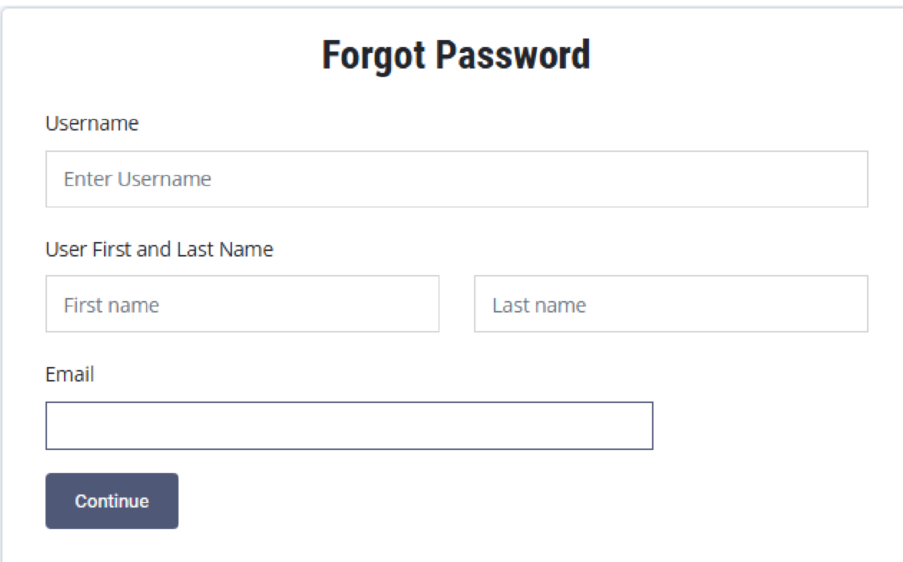
When a user is using Password Recovery, what they enter MUST match what is currently in Manage Profile.

On the main page of the site, click Forgot Password. All users will be directed to this page.

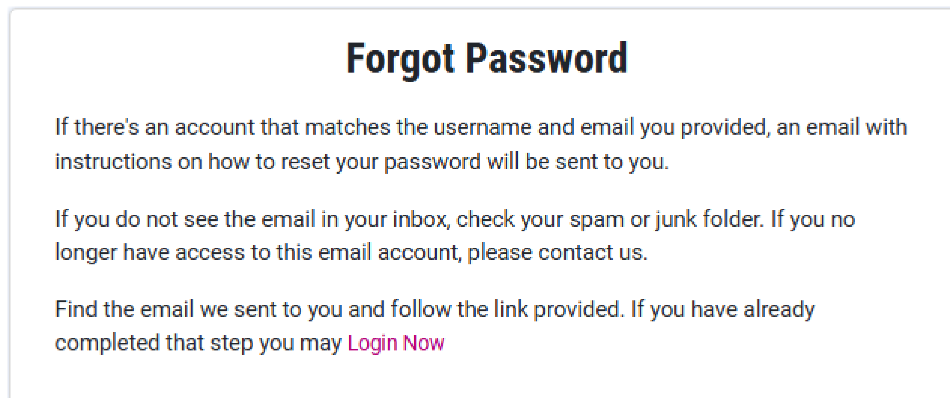


Sample Password Recovery – all users

When a username is entered, users will be directed to the Forgot Password page. This will look the same for all users.



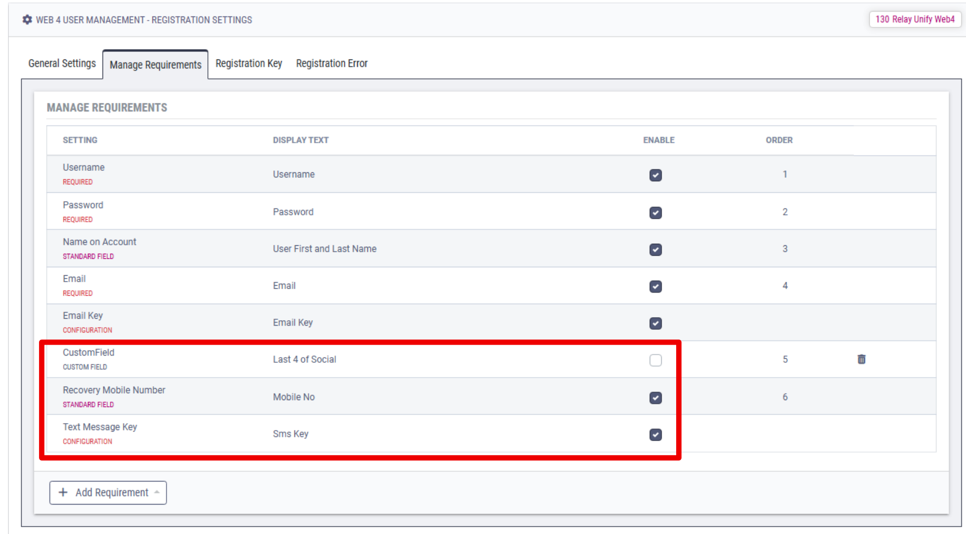
Once the necessary steps are followed to recover a password, the user will see this notification.

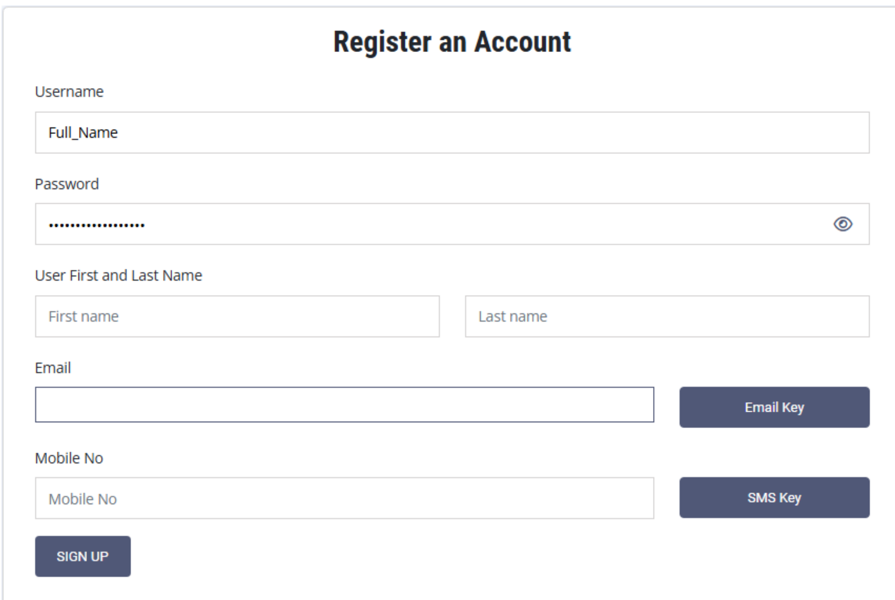


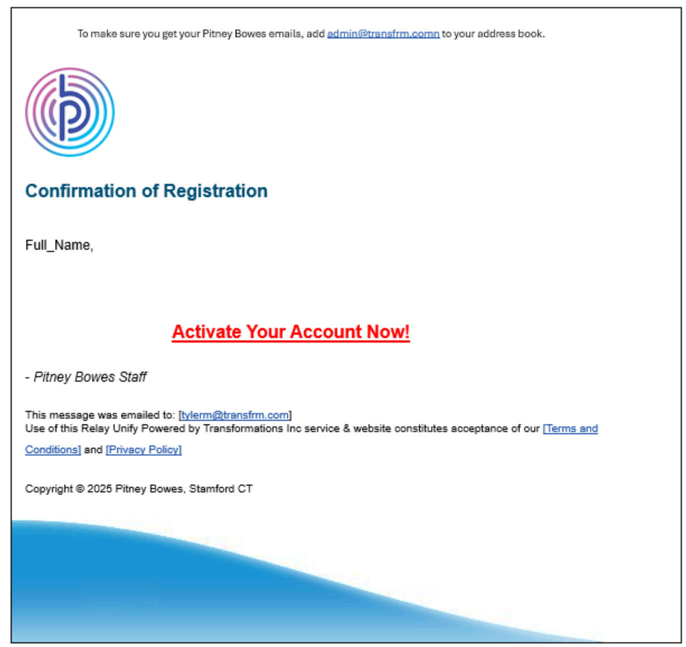
Text Message Keys / Email Keys

Users will receive an email with a key rather than a link if either or both of these are enabled. To enable, check the key(s) that can be used to register or retrieve a password.

If the keys are disabled for Registration, the user will fill out the registration fields and click the Save button. At that point the Register email (located in uSetup Web > Web 4 User Management Dropdown > Email Event Tab > Register Tab) will be sent to the user containing a link for the user to activate their account and complete New Registration.





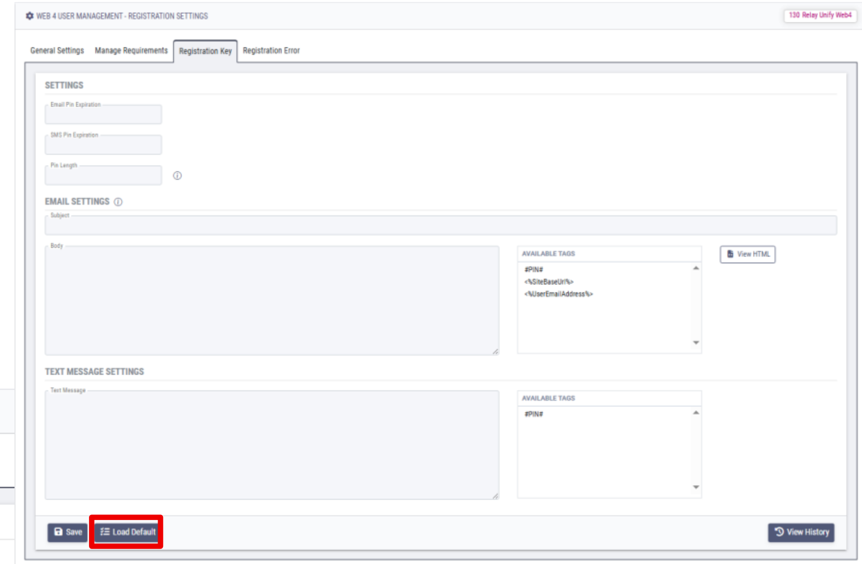


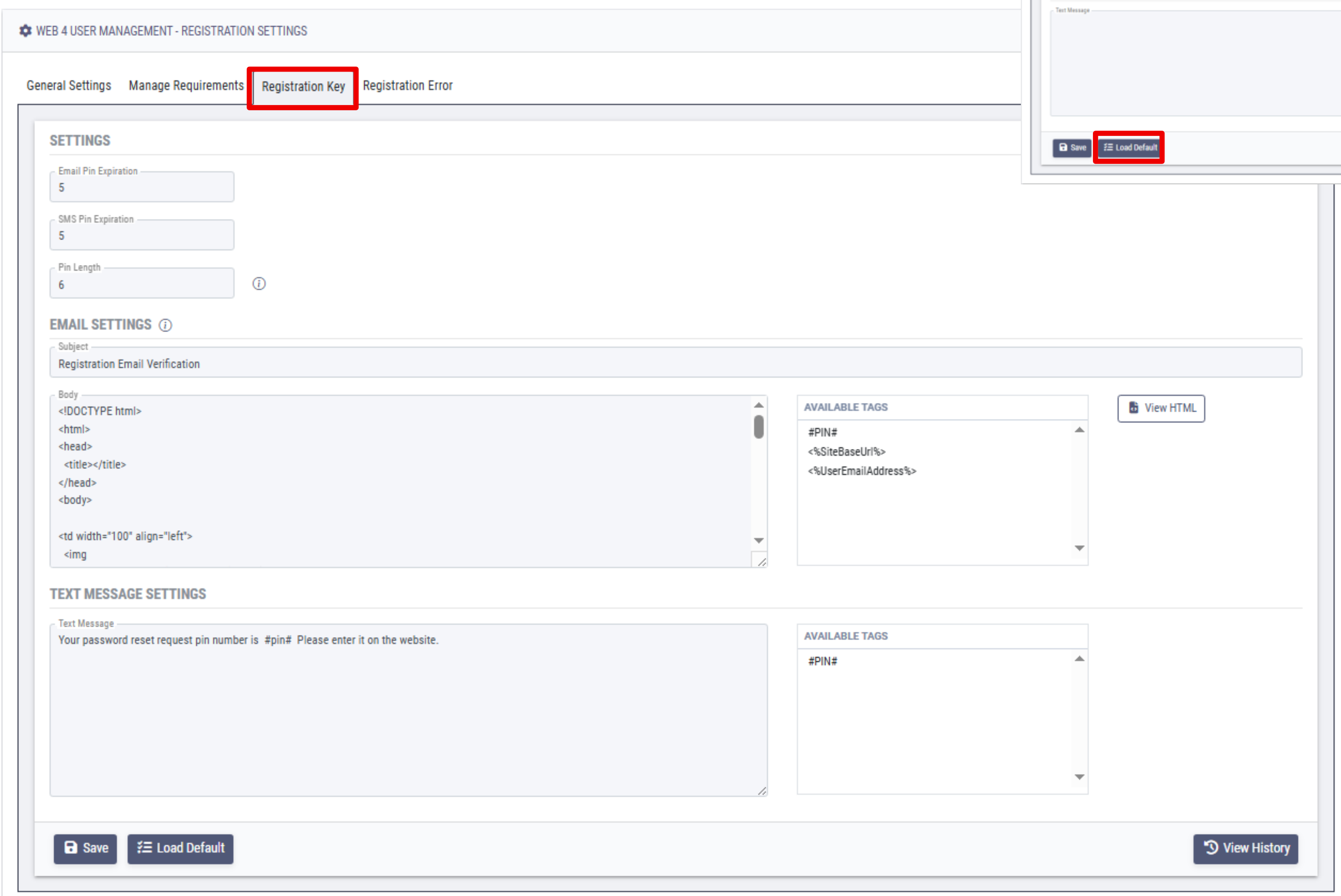
Tips:

In order to use a Text Message key for Registration or Password Recovery, uDeliver is required.

If the keys are enabled, the Email/Text Message must be setup.

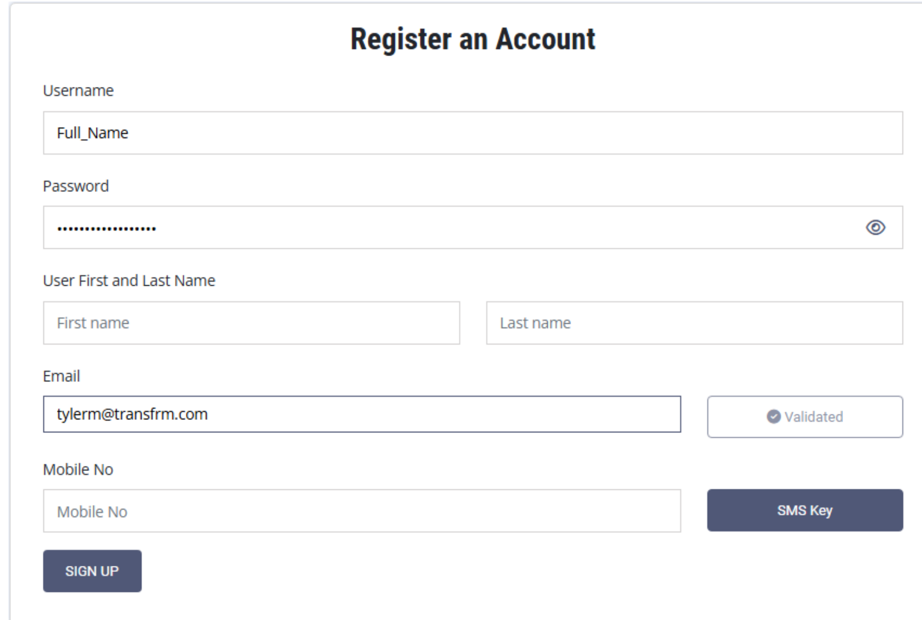
Initially everything under these tabs are blank. If you click the Load Default button, the default email and text message will be loaded. You can use the defaults, modify, or create your own.

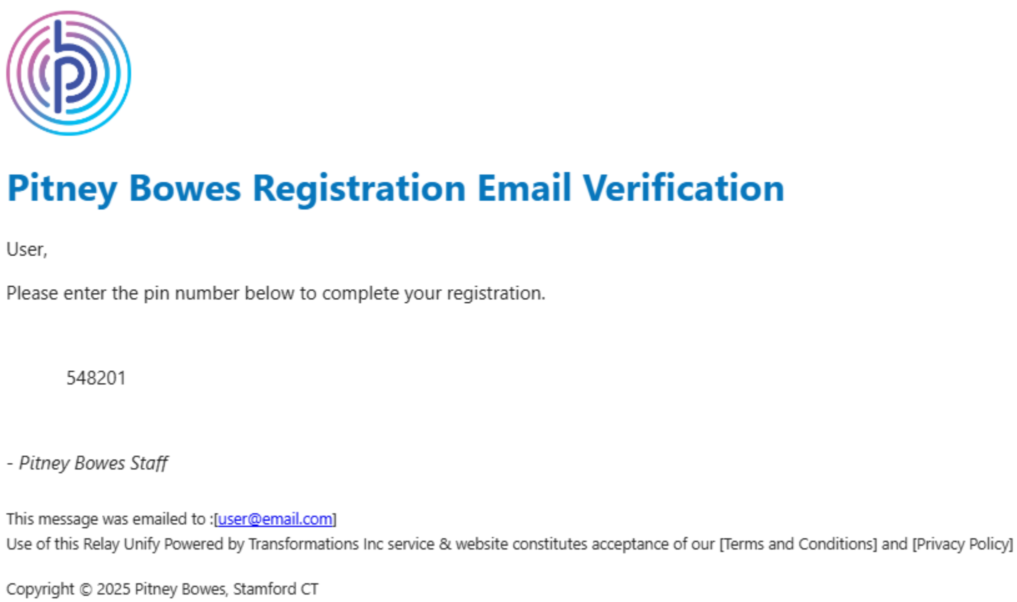




If email/text message keys are enabled for registration, the user can click the one that is enabled, or either if both are enabled. The user only has to receive one key to register.

The Key buttons are next to the field to fill out. Once a user clicks on the key type, they will receive an email or text message with the key that was previously setup under the Registration Key tab.





Pitney Bowes Registration Email Verification

User,

Please enter the pin number below to complete your registration.

548201

- Pitney Bowes Staff

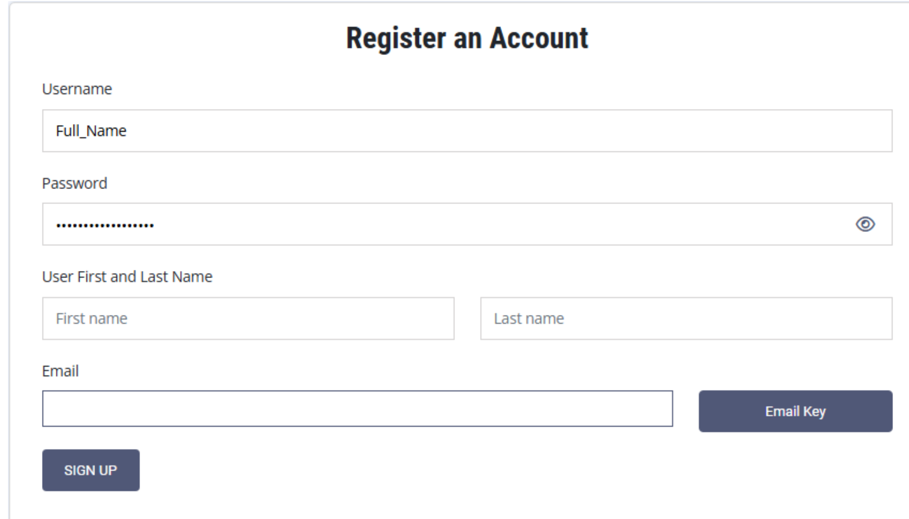
This message was emailed to :[user@email.com]
Use of this Relay Unify Powered by Transformations Inc service & website constitutes acceptance of our [Terms and Conditions] and [Privacy Policy]

Copyright © 2025 Pitney Bowes, Stamford CT

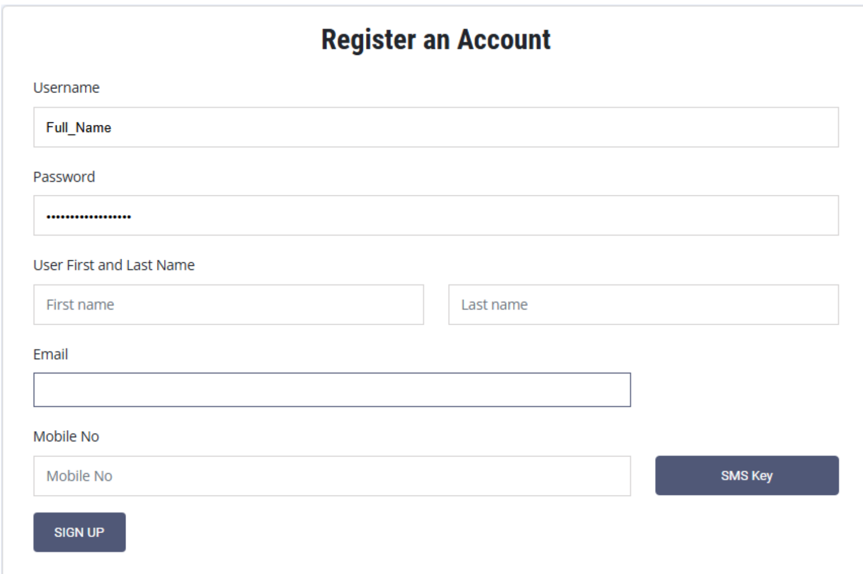
Tips:

The keys will expire after five minutes or if another attempts is made within that time.

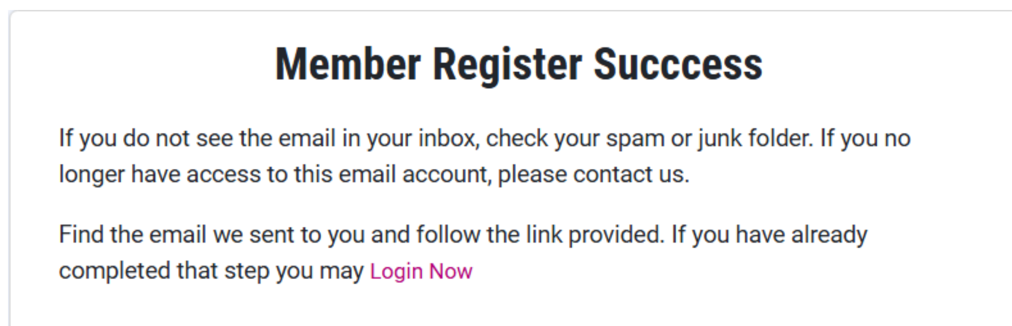
Depending on which key button is clicked, the user will get one of these:



The Default timeout is five minutes, but that can be customized. At the top of the Registration Key Tab, you have 3 settings fields to set the value indicating the number of minutes before the pin will expire once it is sent to the user registering for the web portal, and how long the pin is.



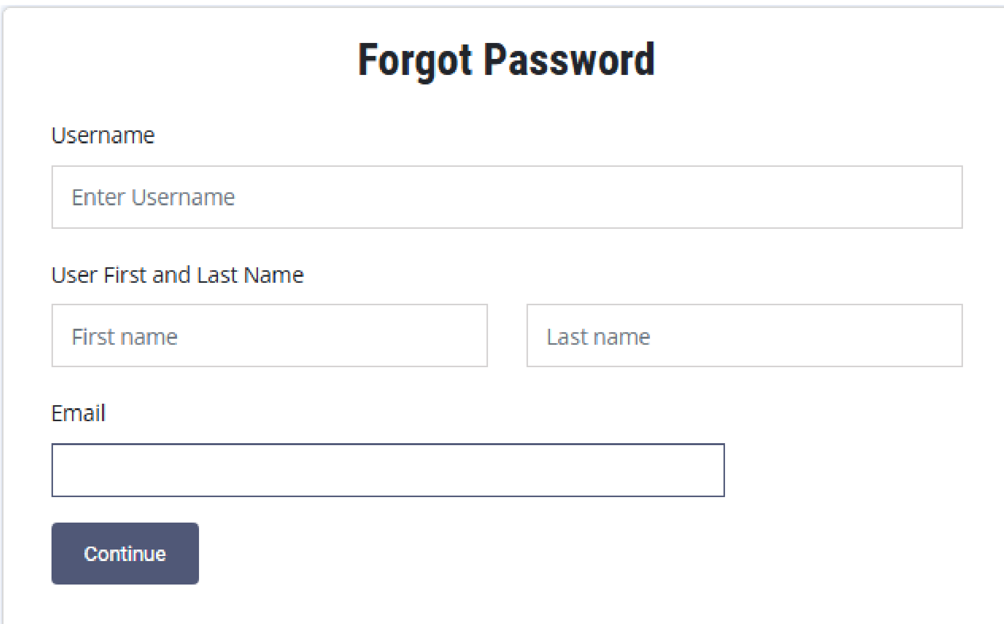
Once the key from the email or text message has been entered, the user will get a confirmation screen.

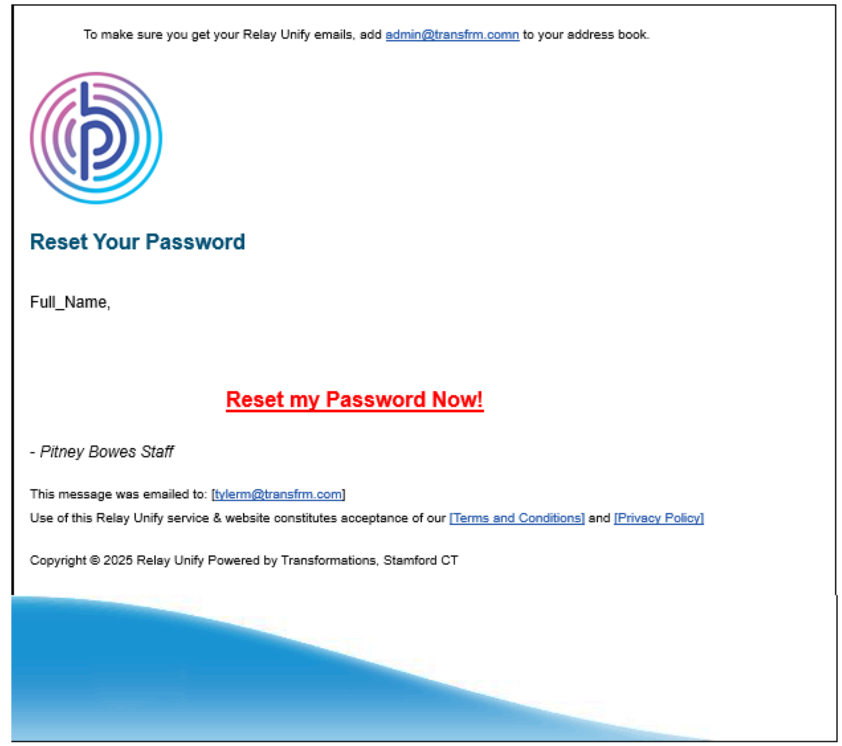


Password Recovery

If the keys are disabled for Password Recovery, the user will fill out the necessary fields on the Account Recovery page. The user can click Forgot Password to go directly to this page or be sent the Reset Password email generated by an admin user on the end user's profile page.

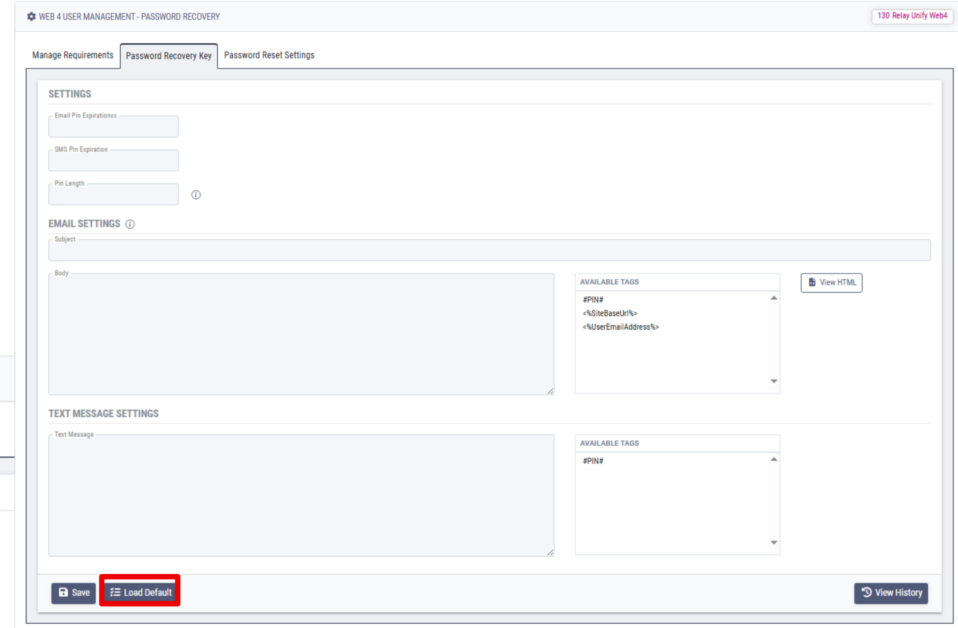
The Reset PW email (located in uSetup Web > Web 4 User Management Dropdown > Email Event Tab > Password Reset Tab across the top.) will have a link for the user to reset their password.

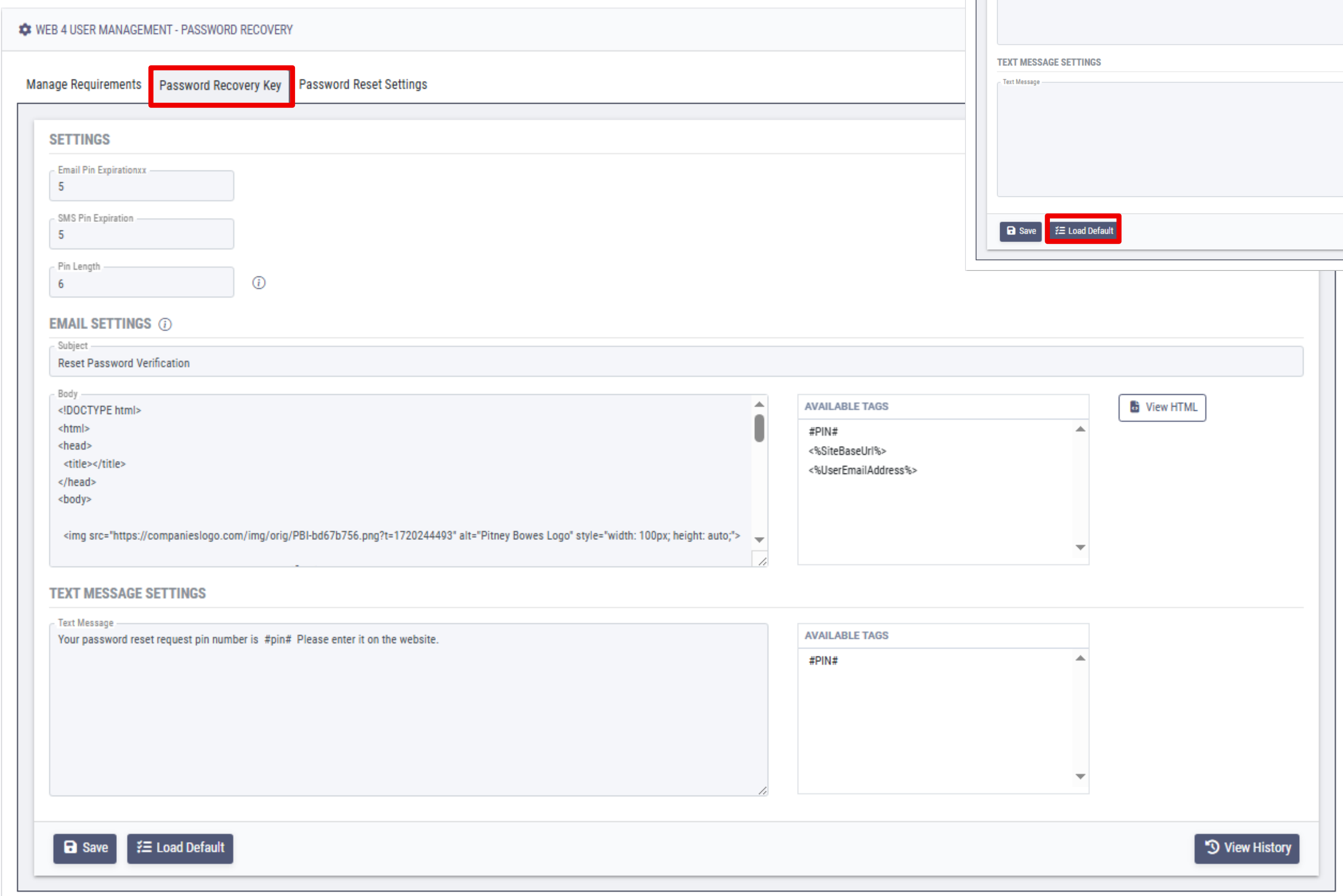




If the keys are enabled, the Email/Text Message must be set up.

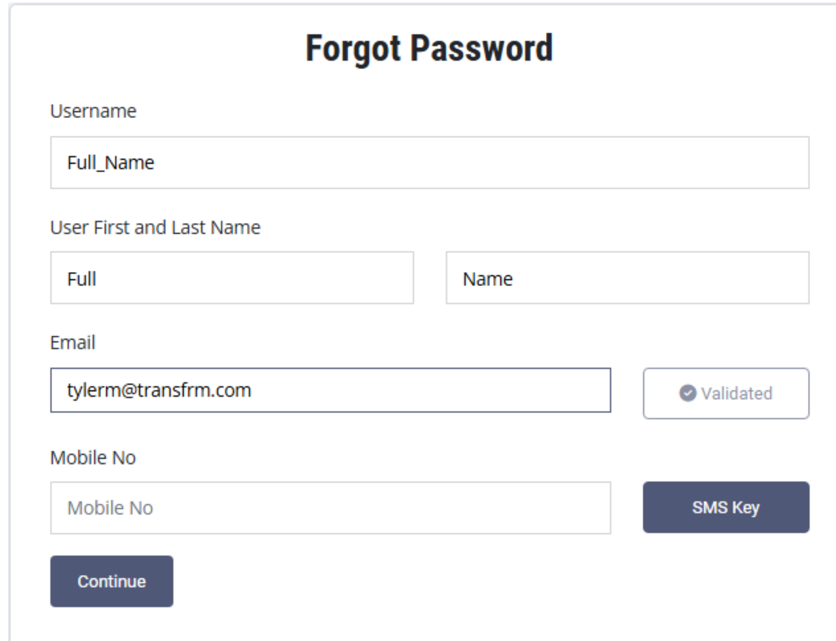
Initially everything under these tabs are blank If you click the Load Default button, the default email and text message will be loaded. You can use the defaults, modify, or create your own.

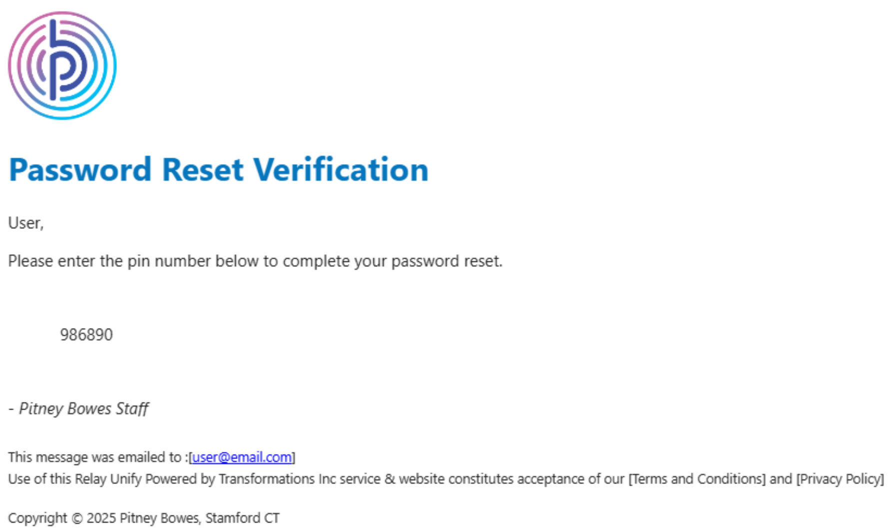




If email/text message keys are enabled for Password Recovery, the user can click the one that is enabled, or either if both are enabled. The user only has to receive one key to reset their password.

The Key buttons are next to the field to fill out. Once a user clicks on the key type, they will receive an email or text message with the key that was previously setup under the Password Recovery Tab.



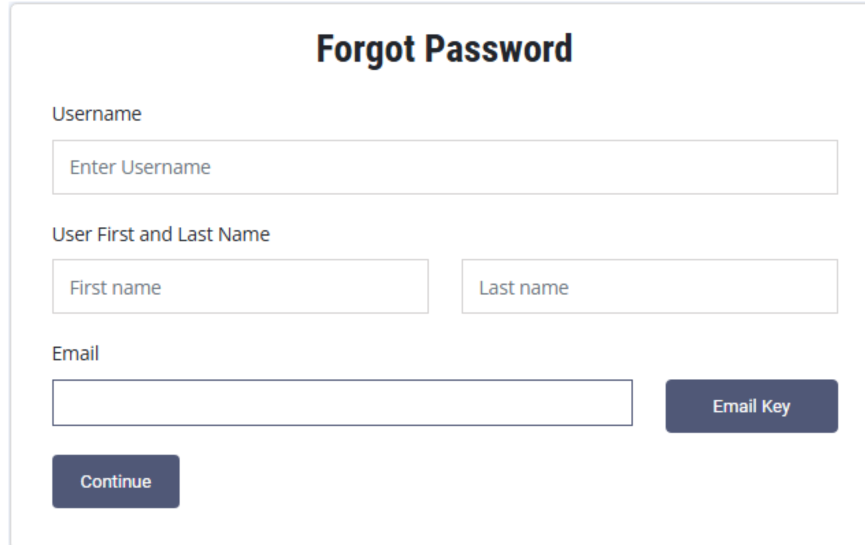


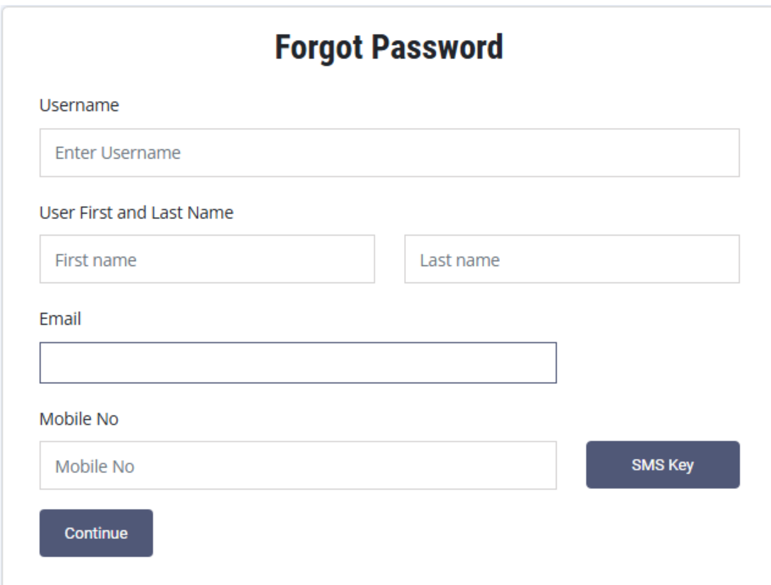
Tips:

In order to use a Text Message key for Registration or Password Recovery, uDeliver is required.

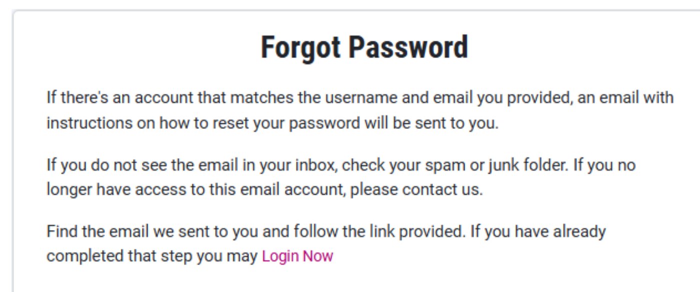
Depending on which key button is clicked, the user will get one of these:

The Default timeout is five minutes, but that can be customized. At the top of the Password Recover Key Tab, you have 3 settings fields to set the value indicating the number of minutes before the pin will expire once it is sent to the user trying to recover their password for the web portal, and how long the pin is.

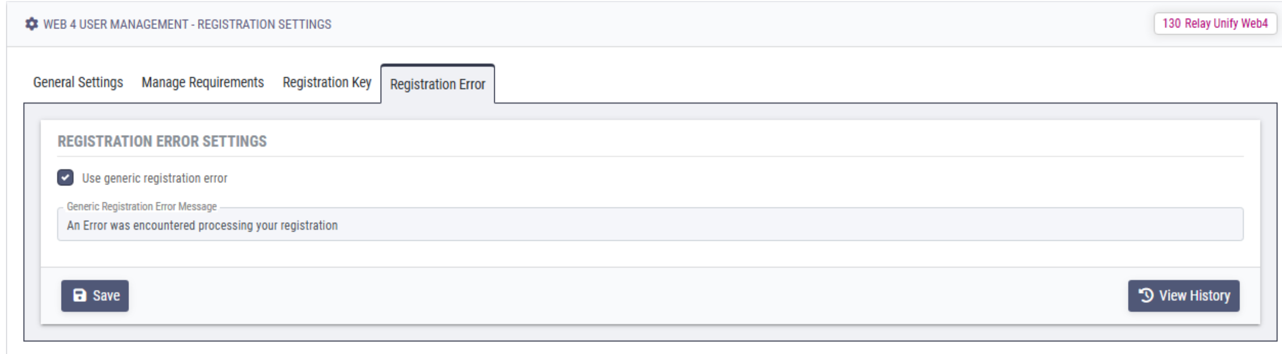




Once the key from the email or text message has been entered, the user will get a confirmation screen.



Registration Error

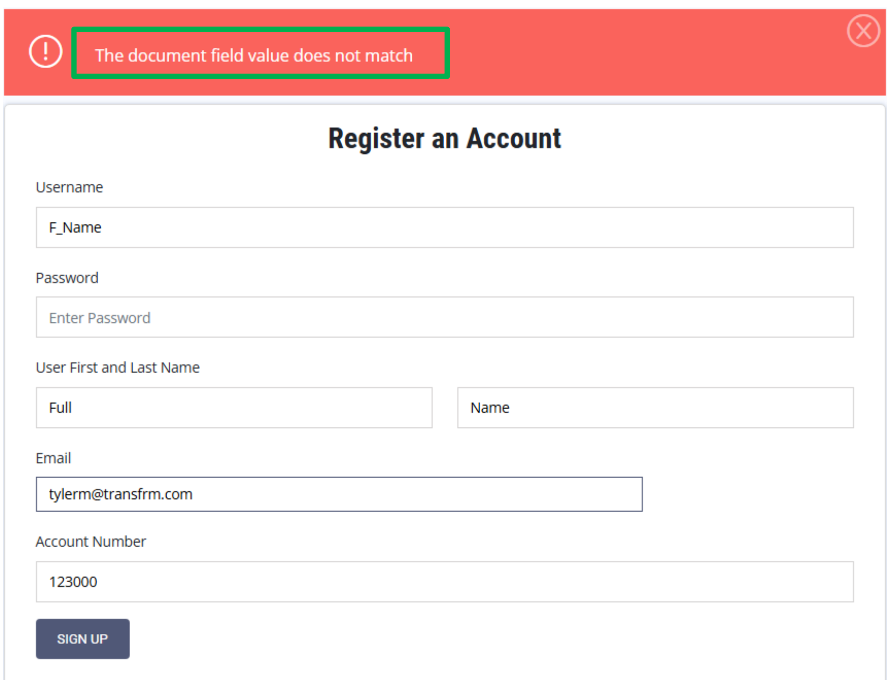


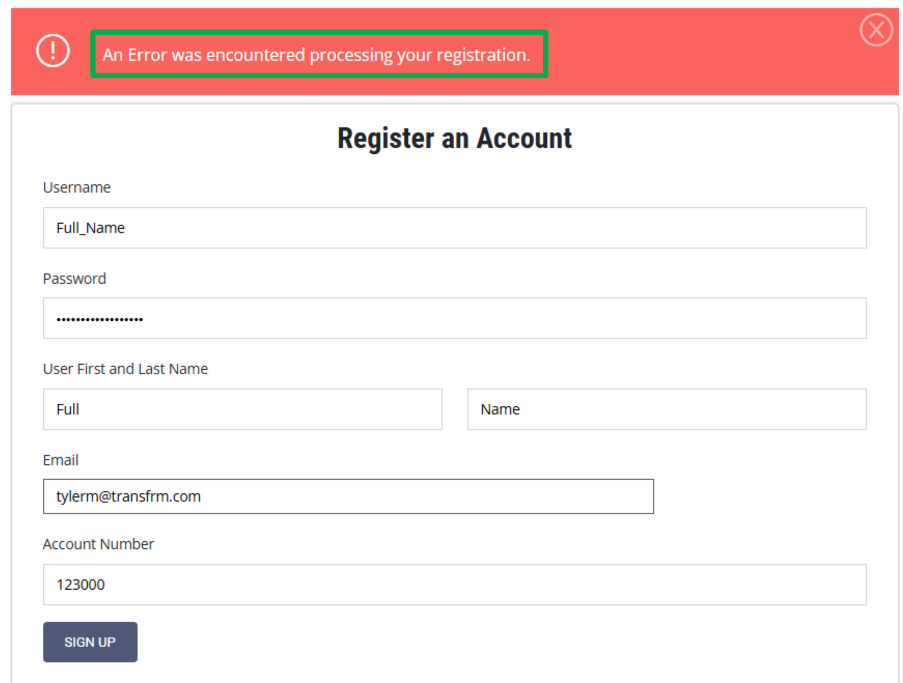
Checking the box turns on the generic registration error message. Enter any error message that you would like to be displayed at the top of the registration fields.

This error is triggered by a document lookup error based on Document Field Validation. If there is no record for the account number, name, and/or zip filled in by a user, the error will be displayed. These three fields must match what is on the statement EXACTLY or this error will be generated.

If this is unchecked, the default error “The document field value does not match.” will be displayed instead.

Click save for the changes to take effect for the New Registration page.





Password Reset Settings

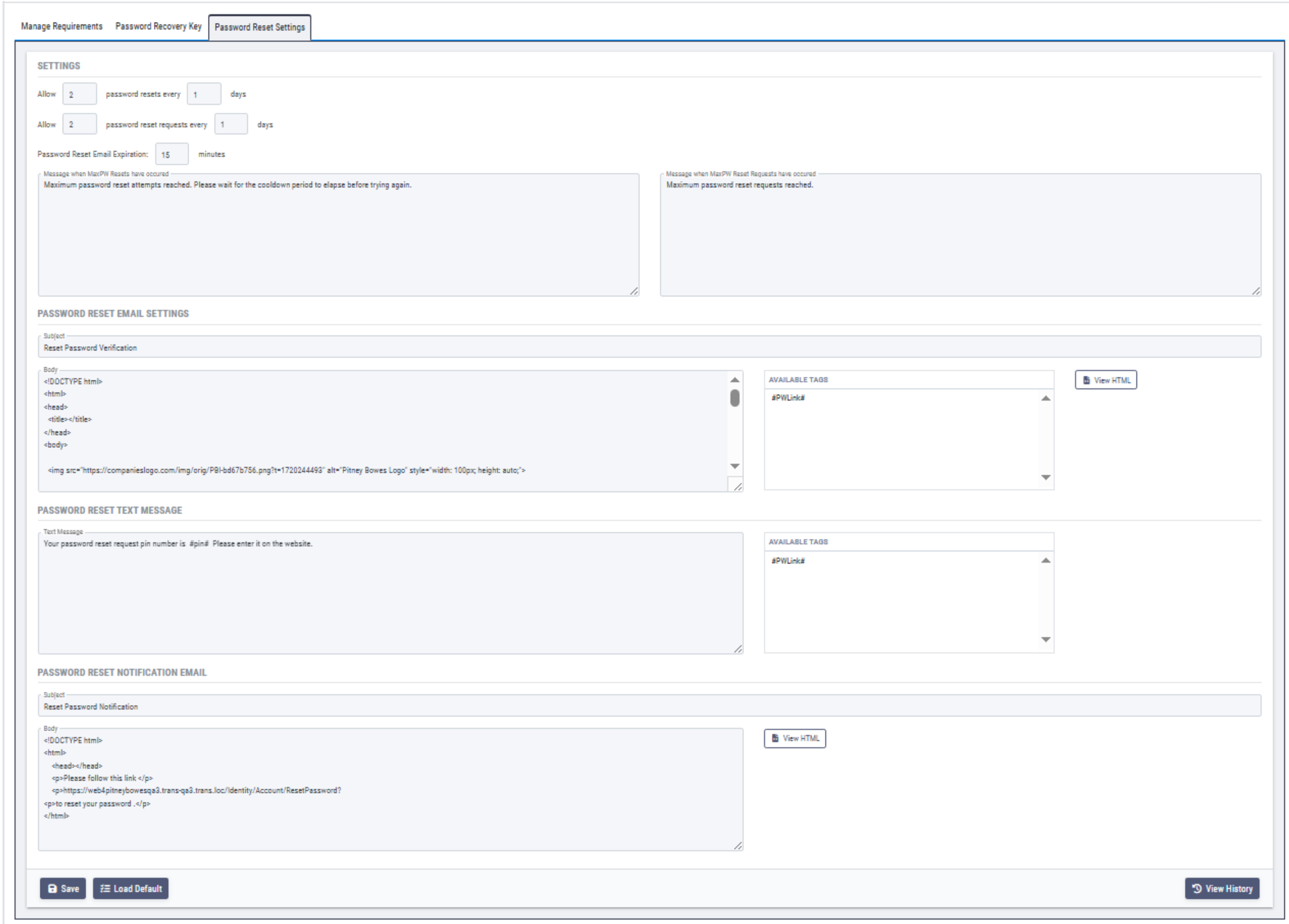
This can be set up in the Password Recovery Tab under Web 4 User Management Dropdown.

These settings are in addition to the Password Recovery Key under the same tab.

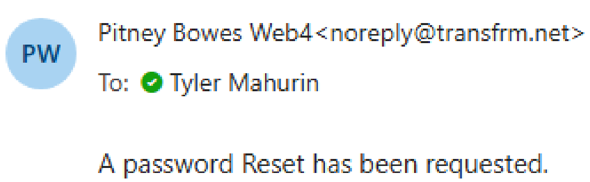
This feature for a client’s web portal is automatically enabled.

Click the **Load Default** button at the bottom to populate the values shown. These can then be edited as desired.

The **Allow Password resets every X days** value will determine how many times a user can change their password during that time interval.

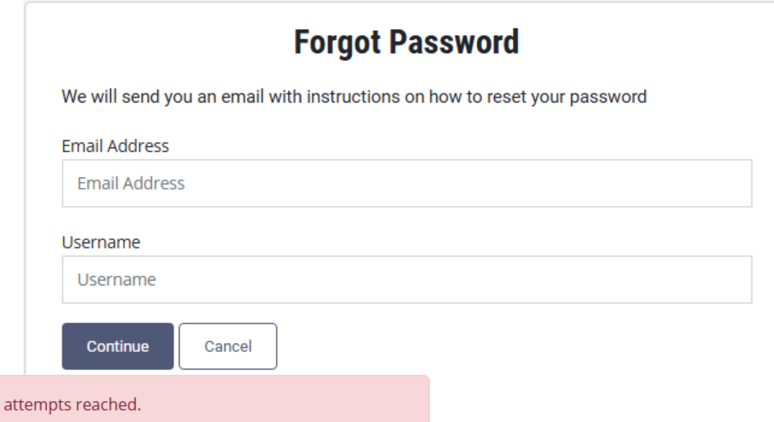


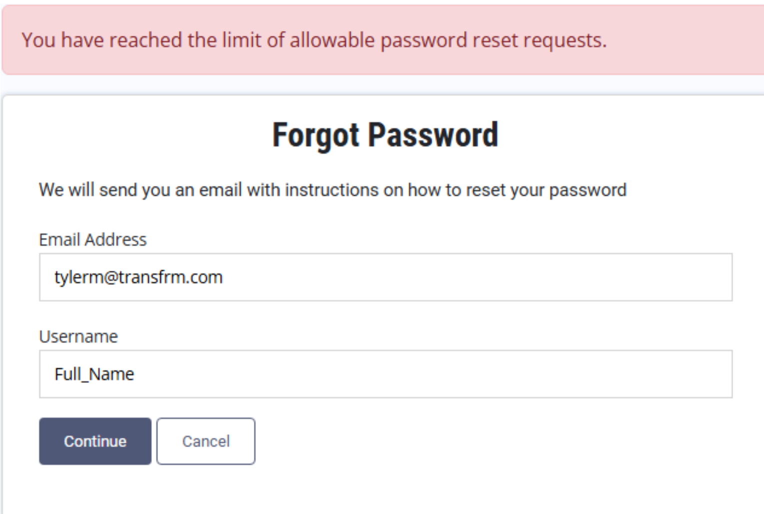
The **Allow Password Reset requests every X days** determines how many times a user can click on the Forgot Password link on the Home page and enter their username to begin the PW reset process. Each time the user clicks Forgot Password and enters the username, it will trigger the **PW Reset Notification Email** to be sent to the user’s email.

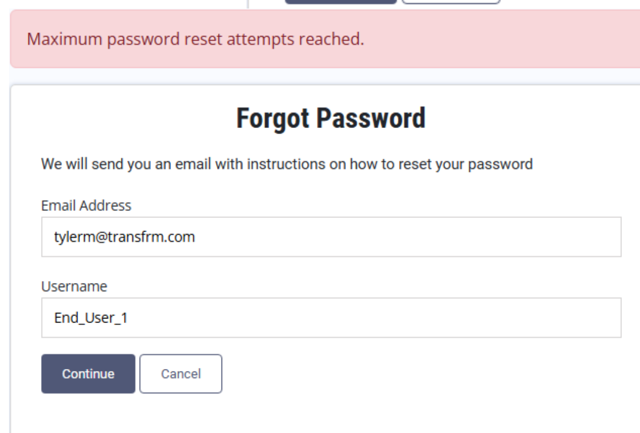


When the user clicks Forgot Password, the user is prompted to enter their username.

If the Max Password Resets or reset requests have been reached, the corresponding error message will be displayed. The user will then have to wait until the number of days entered for that setting has passed or contact an admin/CSR user.

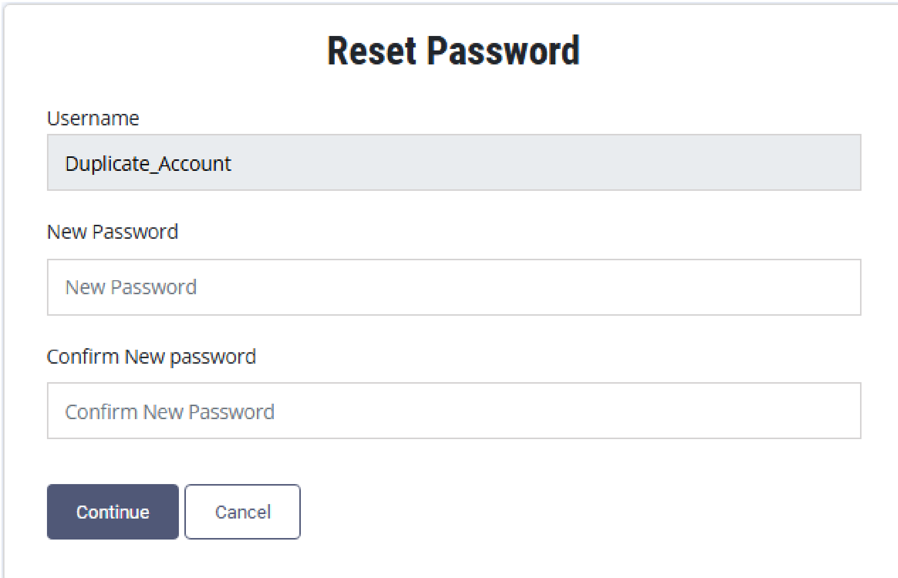


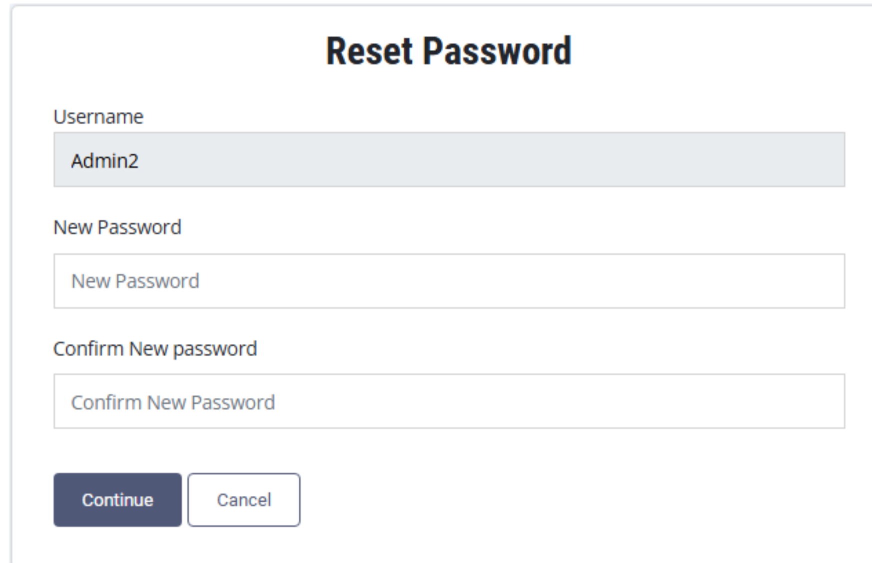


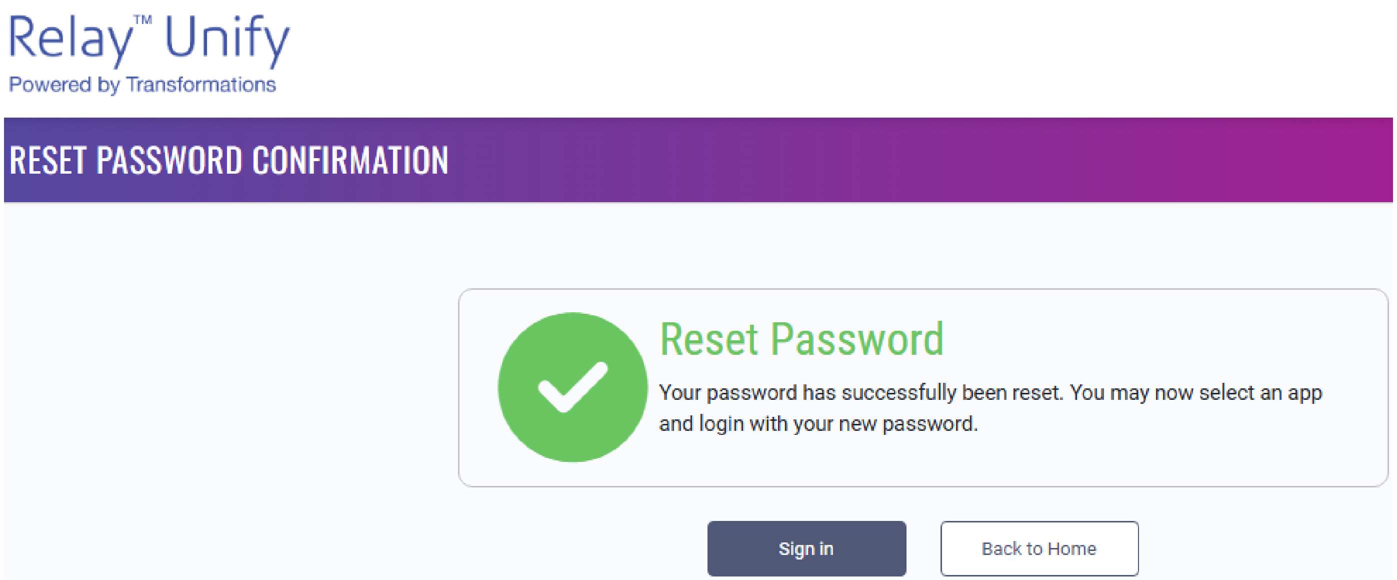


If an admin/CSR user resets any user's password from their profile maintenance page, that will send the **PW Reset Email** allowing the user to click the link to reset their password.

Any time a user has their password reset either by an Admin/CSR, or by the user themselves, they will all get the same Reset Password window. Once the password is filled out, they will be notified and allowed to sign in again afterward.







Email Events (Register, Enrollment, Unenrollment, Password Reset, Password Expiration)

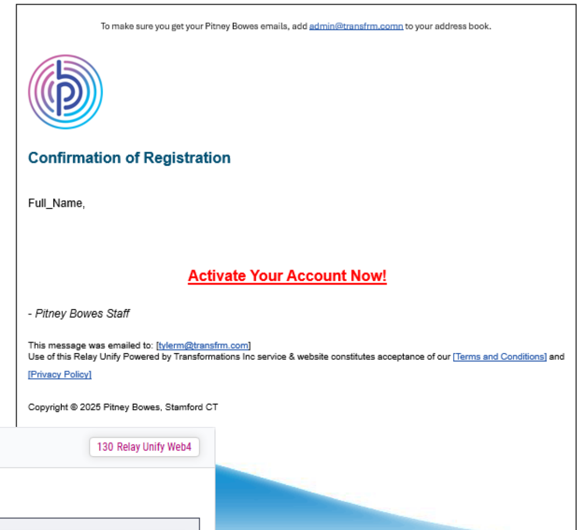
All of these emails can be customized. They can all be found under the Web 4 User Management Dropdown, click the Email Event Tab on the left and across the top you'll see the 5 email event tabs.

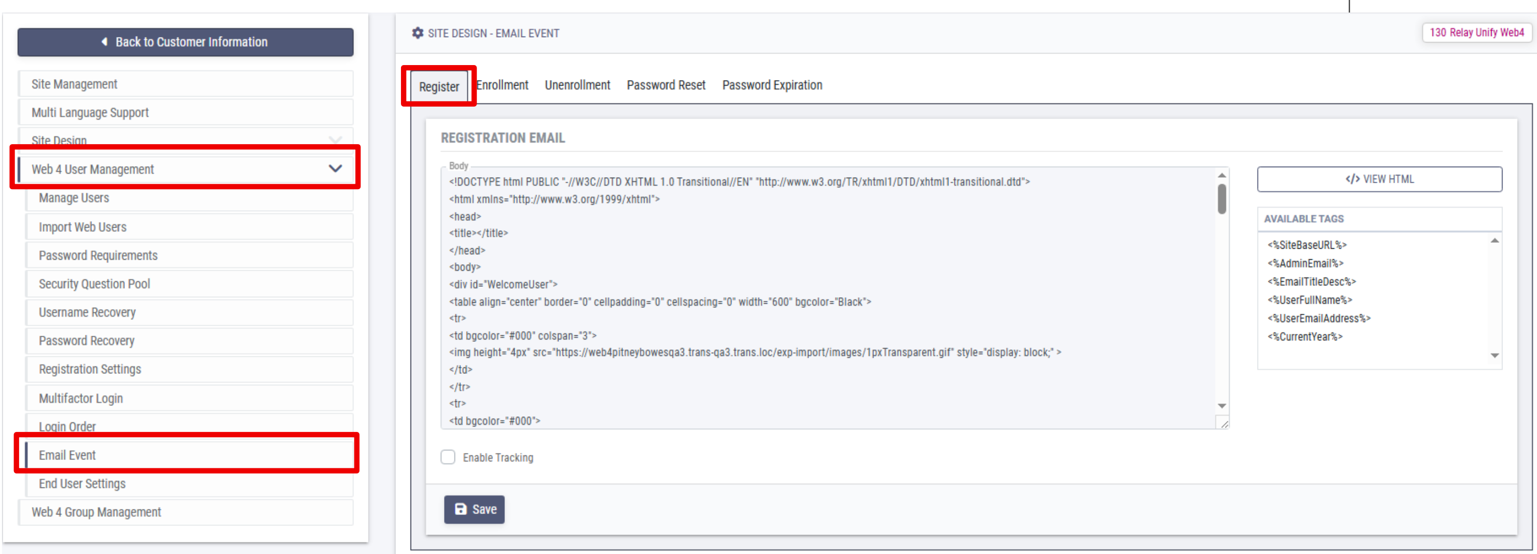
Customize the email, and click the View HTML button to preview the email. You can add variable tags throughout the email. If you are using Mandrill to track emails, check the Enable Tracking box on any of these emails to track the emails that are sent.

> ***Tips:***
>
> The Register/Reset Password and Password Expiration emails are automatically enabled and there is a default email. The enrollment/unenrollment emails can be enabled or disabled. They are both blank by default and must be created.

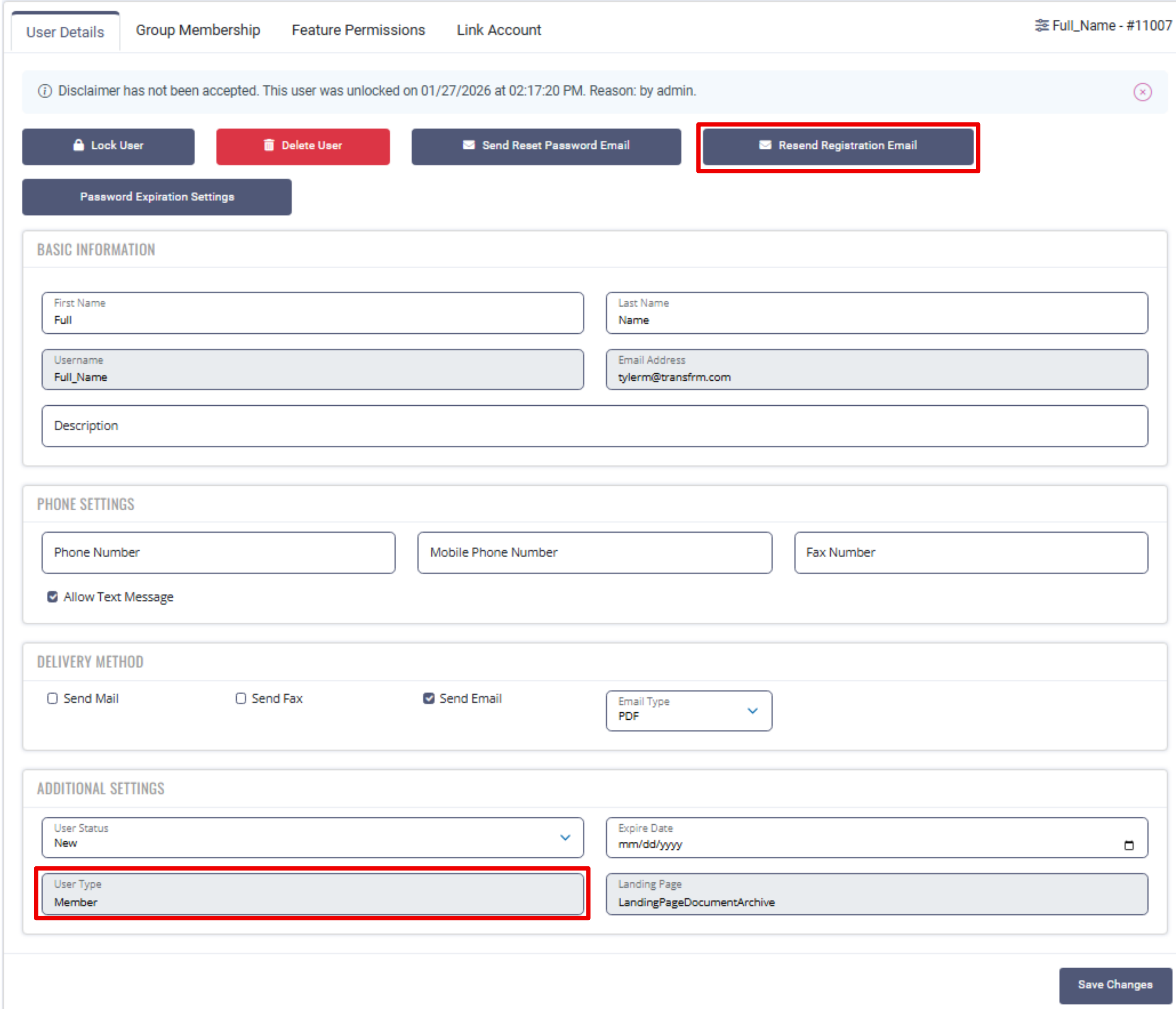
Register

This email will be sent to a user that has used the default self-registration page to register. The user will be in New status until the activation link is clicked and the user logs into the site. Once the user logs in successfully, the user will be listed as Active status and no longer be in New status.



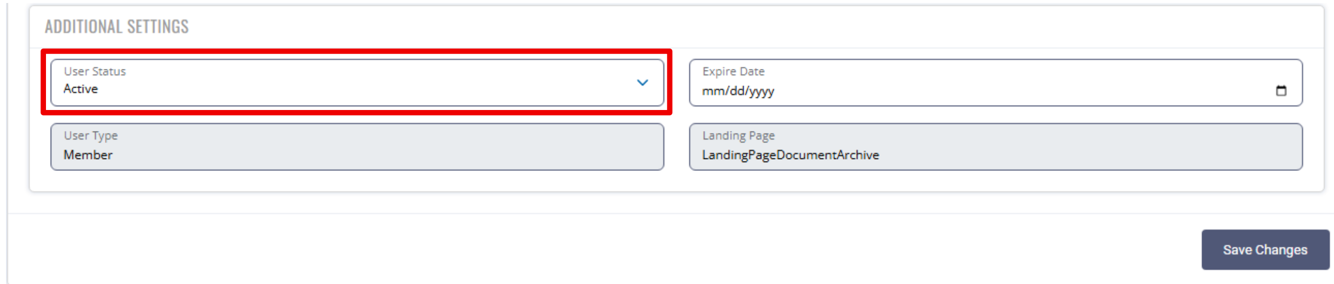


If the registration email to activate the account expires, an admin user can resend the email. Under manage users, select a user. The **Resend Registration Email** button will only appear here if a Register email has been sent and the user is still in New-N status, meaning their account is not active yet; they have not completed the registration process.



Enrollment

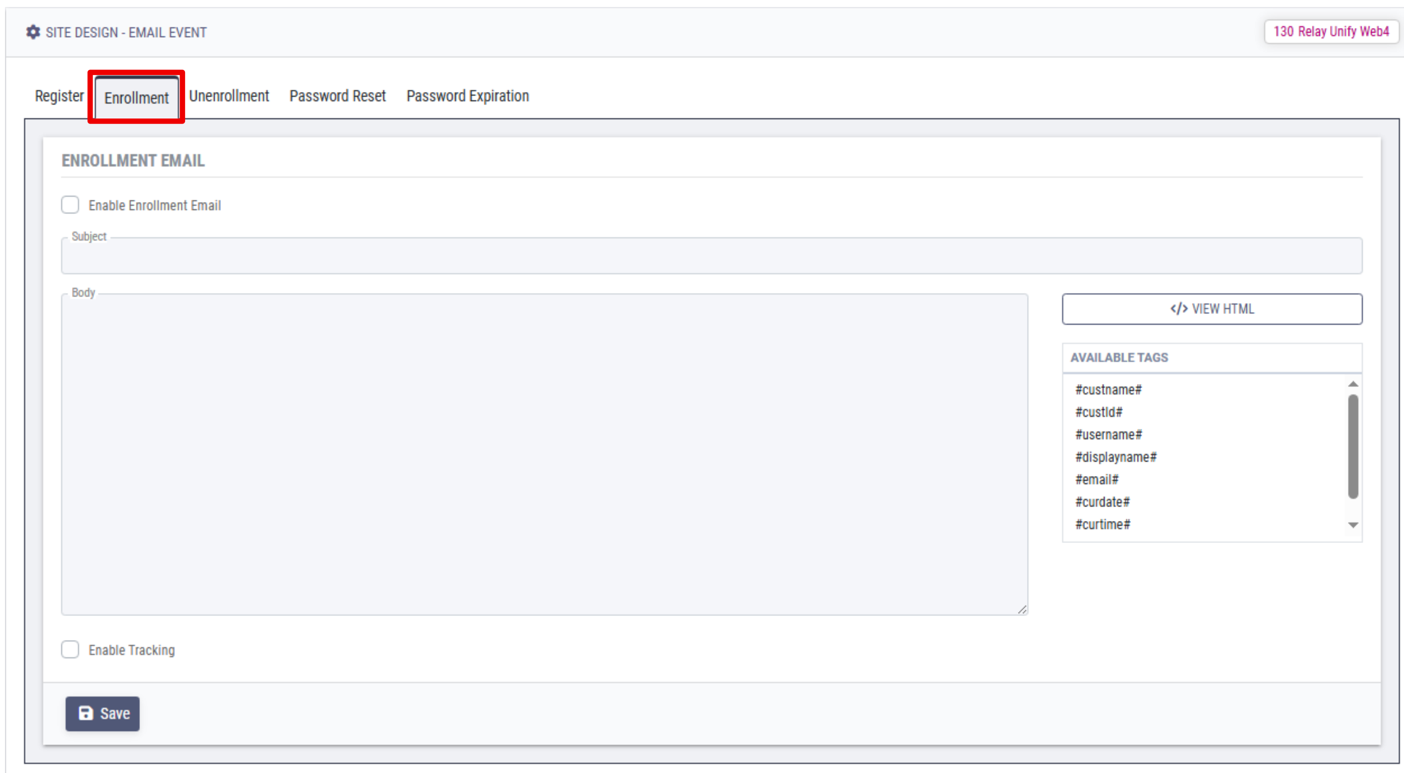
This email is sent to users when their status changes to Active in certain scenarios.



This can happen manually by an admin user by selecting a user under Manage Users. Changing the status under the profile maintenance of that user to Active will trigger this email.

This email will also get triggered once a new web user completes self-registration using the default registration page.

This email is not triggered to be sent to imported users or users self-registering using the New Registration even though both types of users will be created into Active status. There is an email sent to imported users within the import if desired. The keys were designed to function as the email confirmation piece in New Registration.



Customize the email, and click the **View HTML** button to preview the email. You can add variable tags throughout the email.

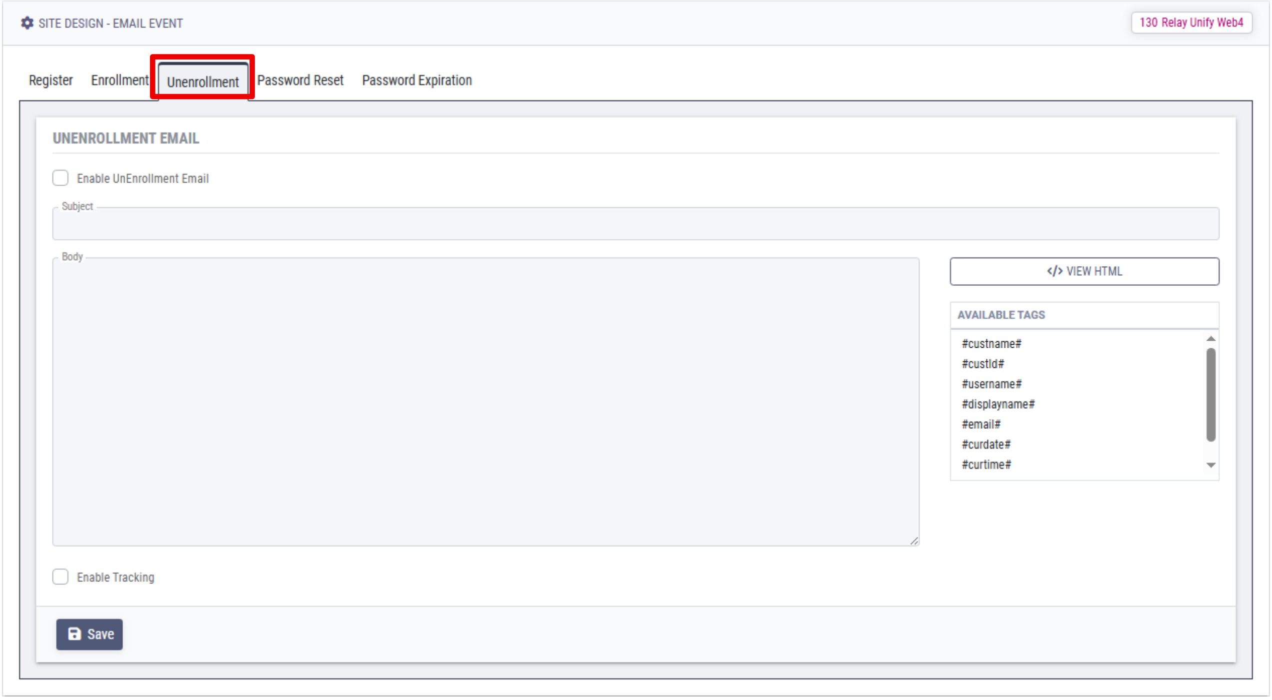
If you are using Mandrill to track emails, check the **Enable Tracking** box on any of these emails to track the emails that are sent.

This email must be enabled by checking the **Enable Enrollment Email** checkbox. Otherwise, it will not be sent to users.

Unenrollment

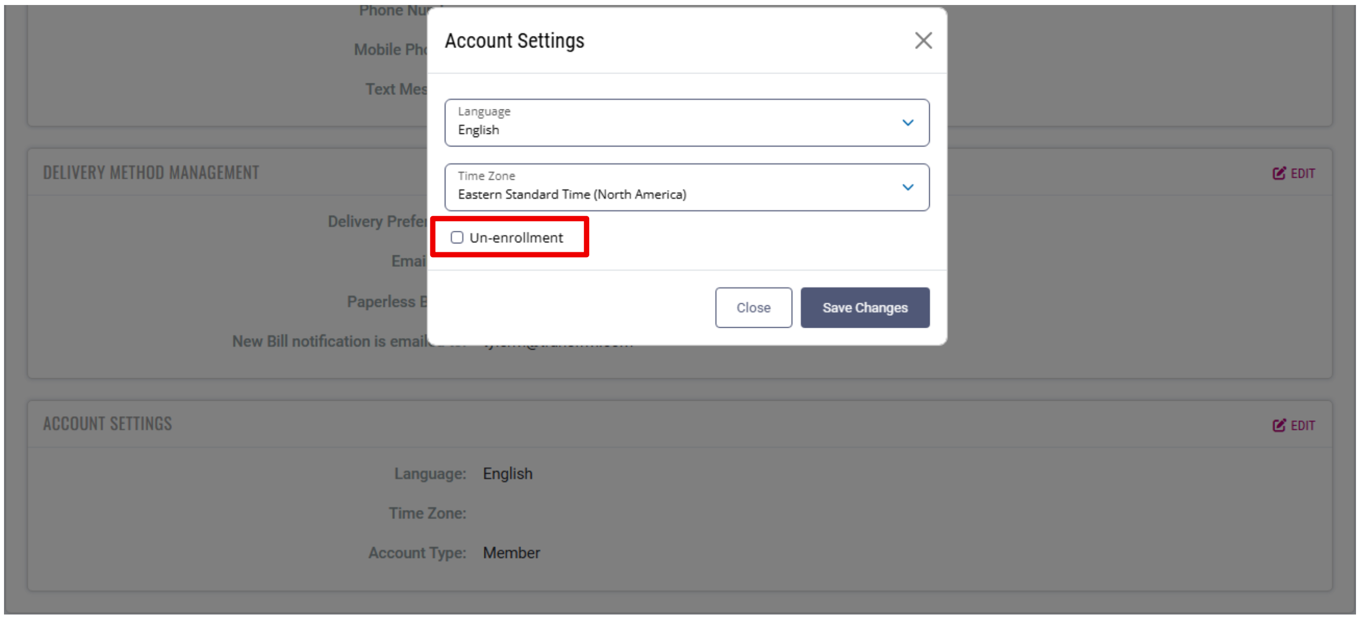
This email is triggered by an end user that checks the UN-ENROLLMENT box within their profile maintenance.

Customize the email, and click the **View HTML** button to preview the email.



You can add variable tags throughout the email. Select the varible from the list and click the **Add Variable** button and the tag will be inserted in the text of the subject line or body or the email.

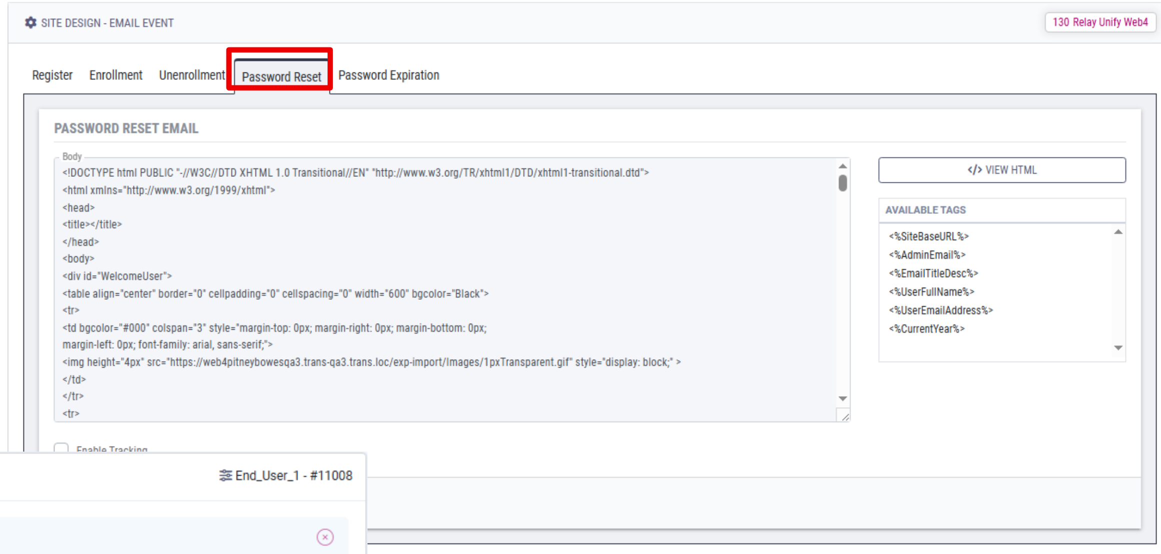
If you are using Mandrill to track emails, check the **Enable Tracking** box on any of these emails to track the emails that are sent.

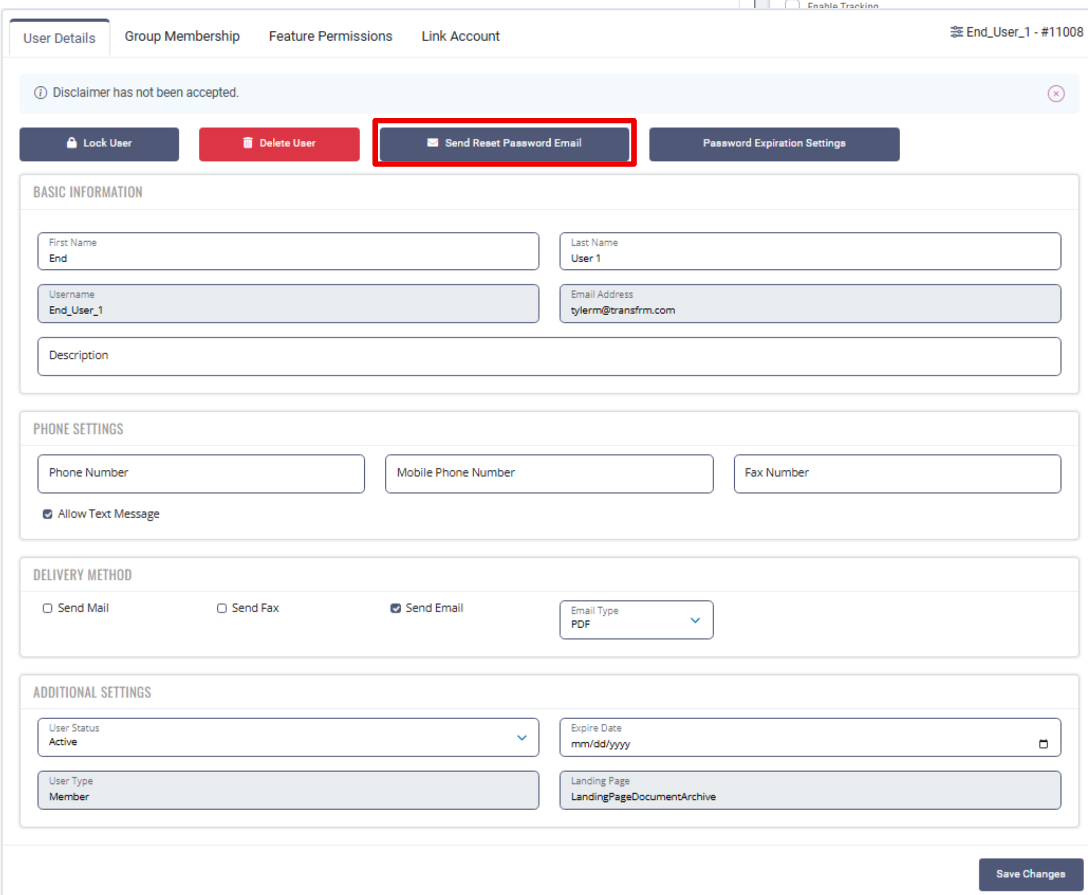


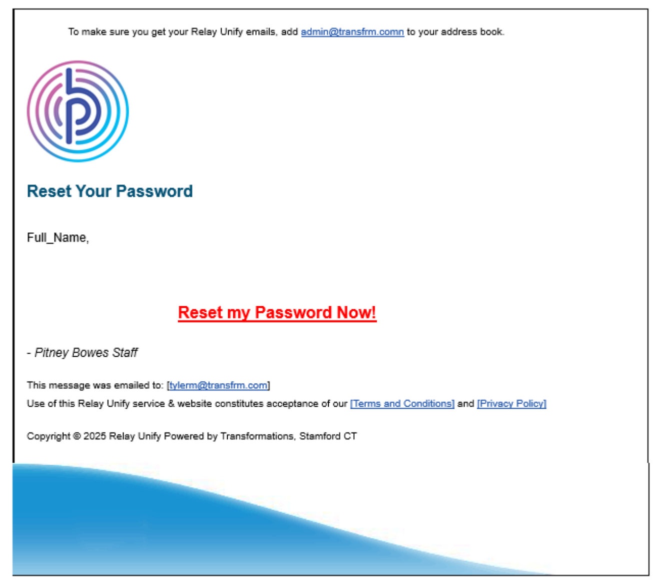
This email must be enabled by checking the **Enable Enrollment Email** checkbox or it will not be sent.

Password Reset

This email is sent to a user if the user clicks Forgot Password and the New Password Verification is not enabled. It is also sent if an admin manually goes to the user under Manage Users and clicks the Reset User Password button. The user can use the link in the email to reset their password.





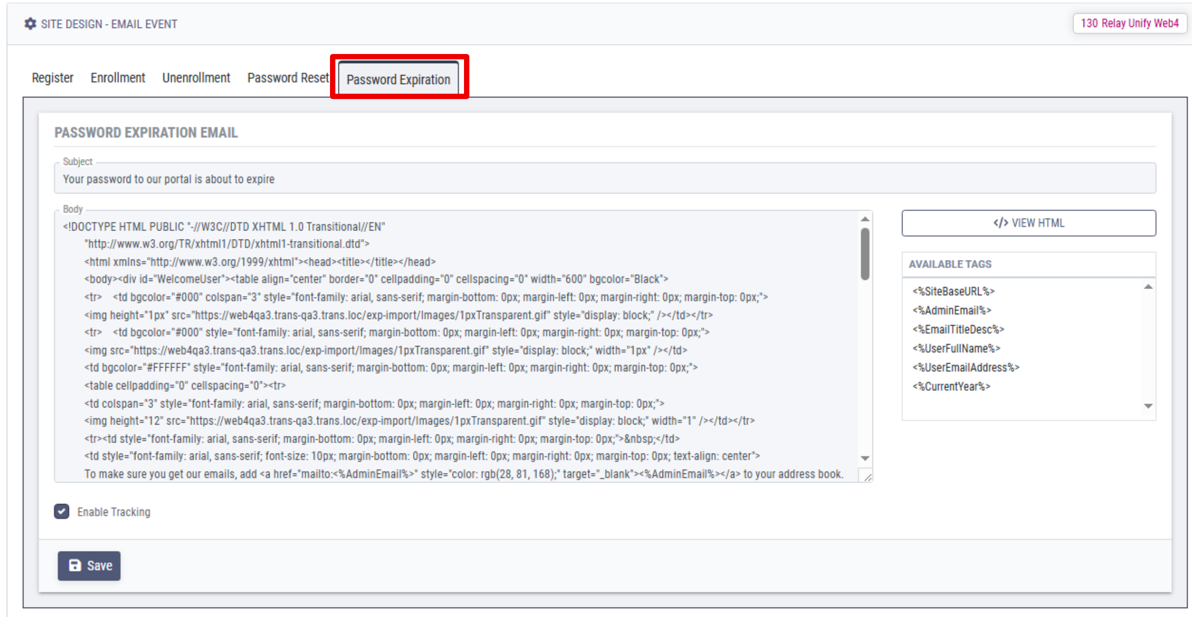


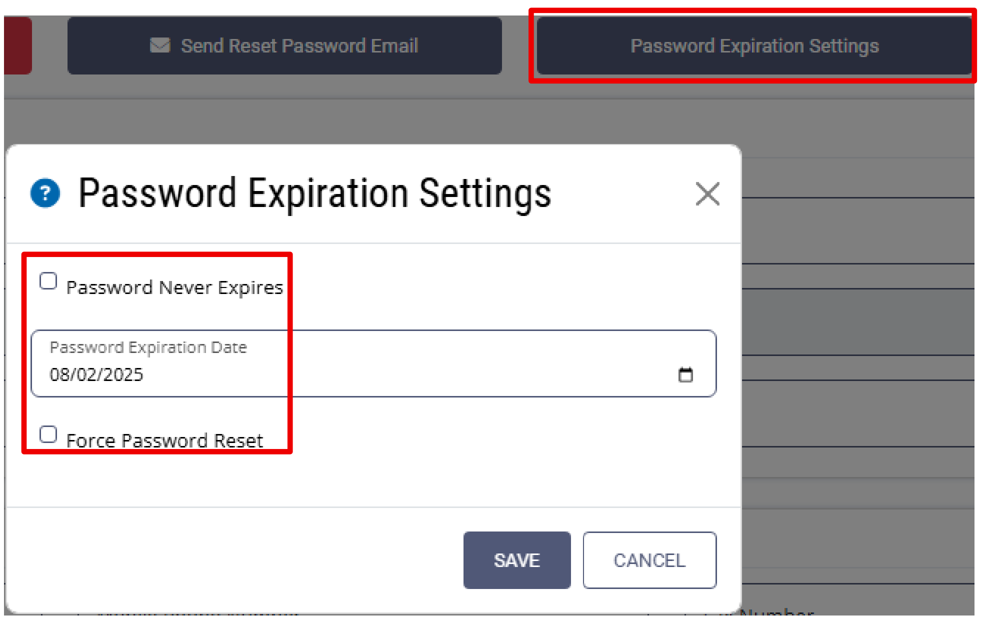
Password Expiration

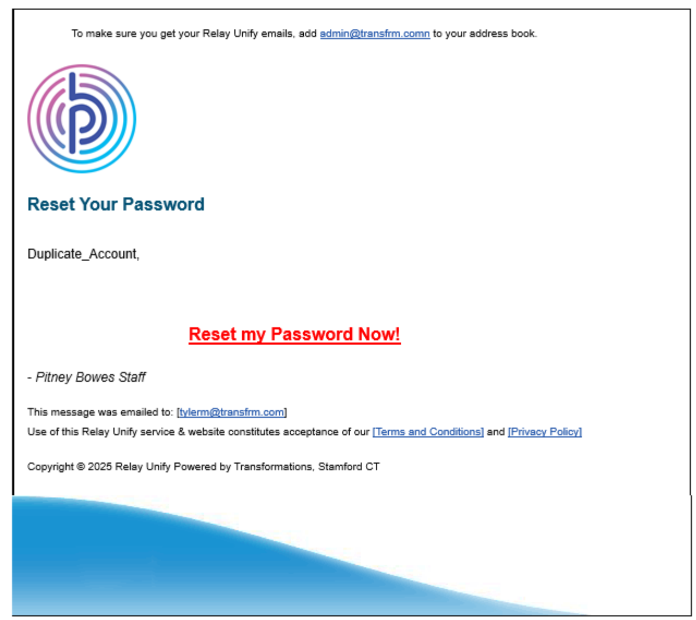
This email will be sent to a user if their password is about to expire. This email is customizeable and can use the available tags on the right-hand side. Click the **</> View HTML** button to preview the custom email.

The administrator can go to the User Management screen in the web portal and access a user's Password Expiration Settings to set a user's password to never expire; set a user's password to expire on a certain date; or force a user's password to be reset.

The user can use the link in the email to reset their password when it has expired.

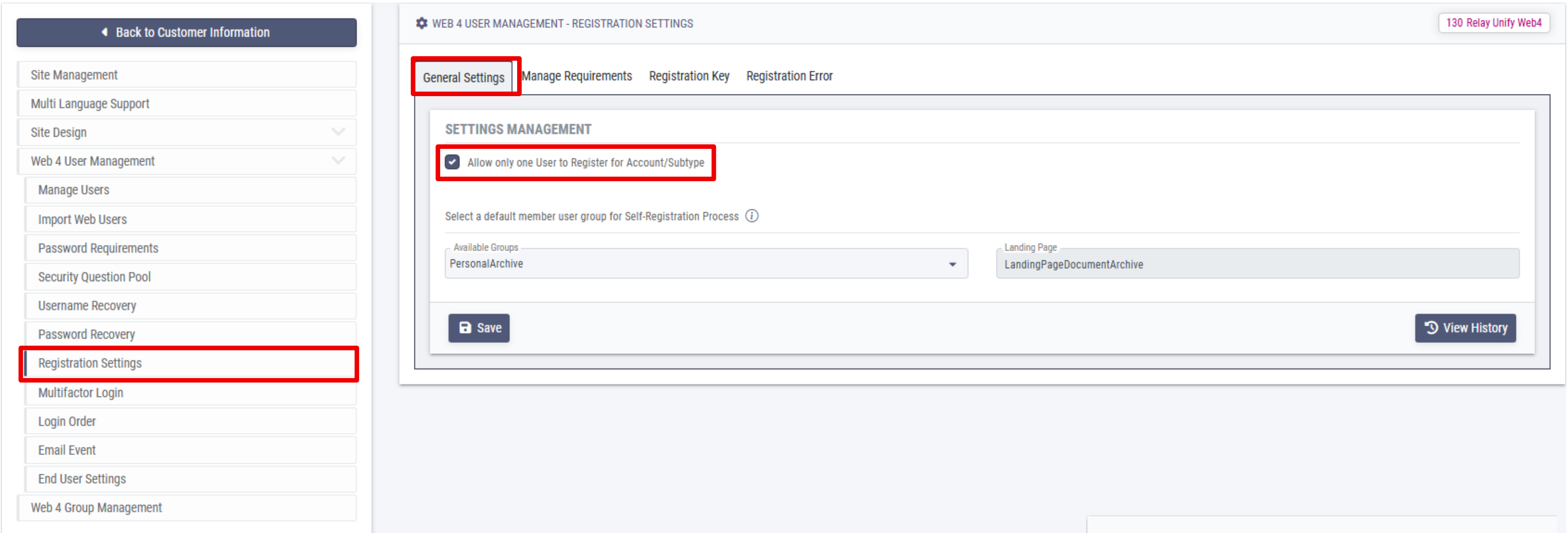






Preventing Multiple Users from Registering for the Same Account

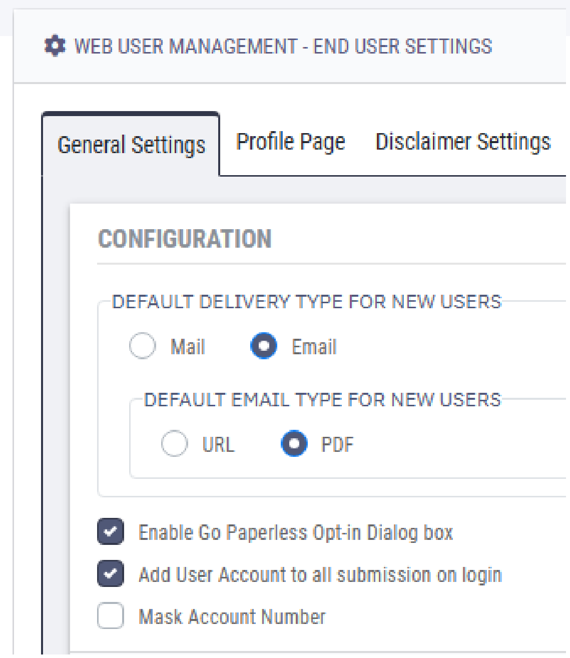
This allows one to prevent Users from registering for an Account that is already registered.



This will work only if the New Registration process is being used.

To enable this feature, in the Registration Settings Tab check the box for **Allow only one User to Register for Account/Subtype**.

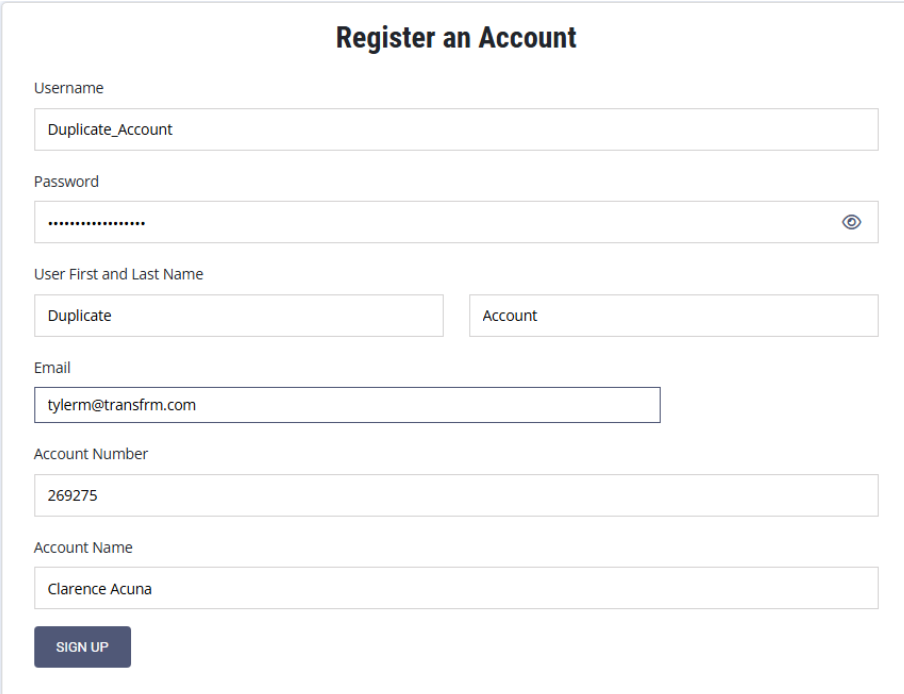
When enabled, on the custom registration page, users will not be able to register for an account number that has already been registered for a submission type. If the account number is the same for a user across submission types for this client, be sure to check the **Add User Account to all Submissions on login** settings in Web settings for this client's web portal.



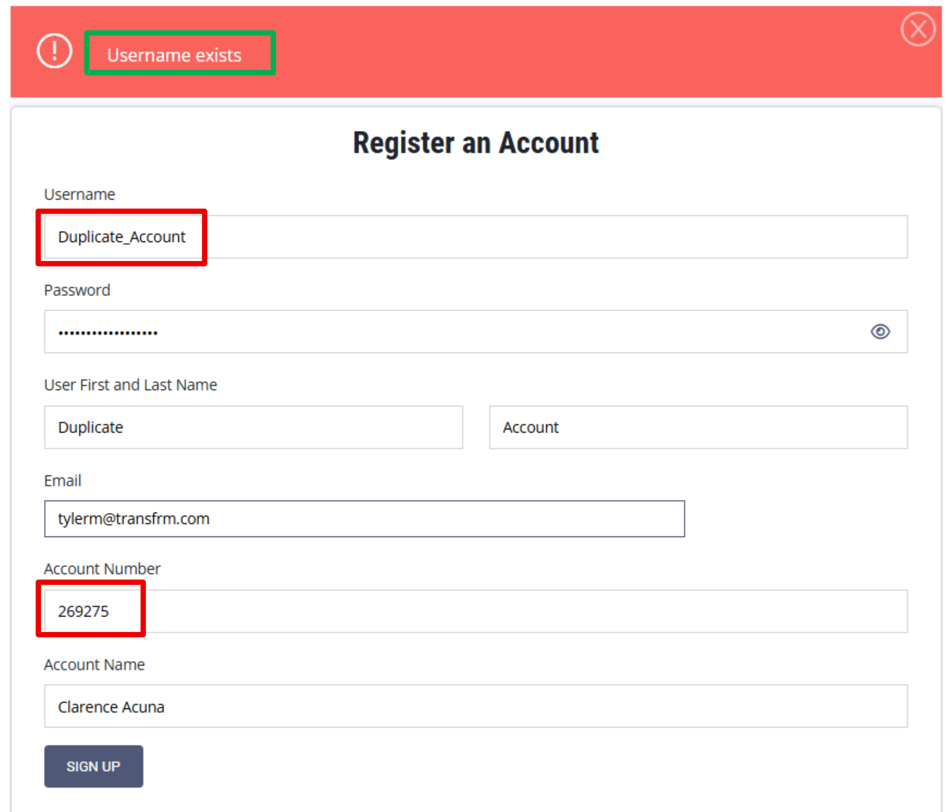
Tips:

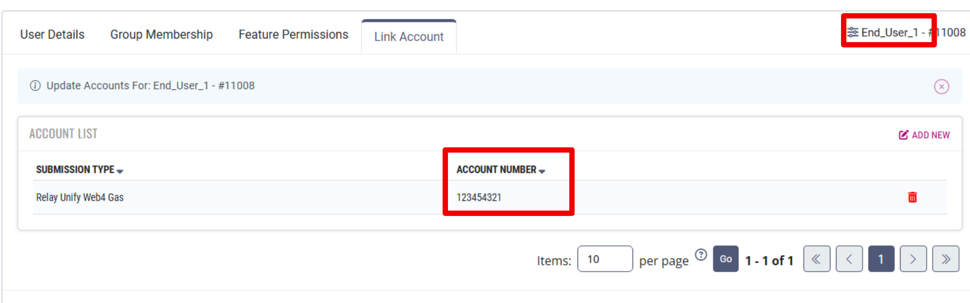
This only applies to users self-registering on the Custom Registration page. It does not apply to the default registration page, admin adding accounts to users manually, or imported web users.

The user will enter all their information to register on the custom registration page.

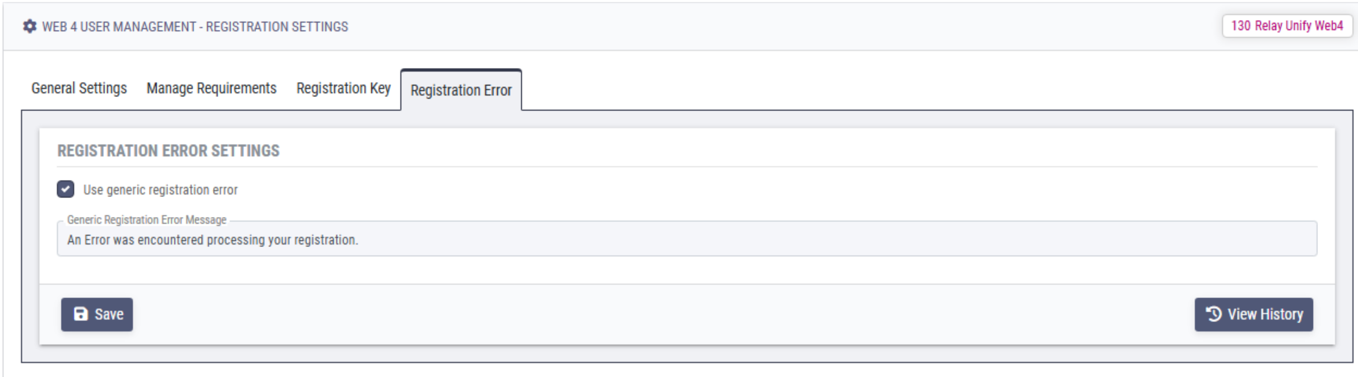


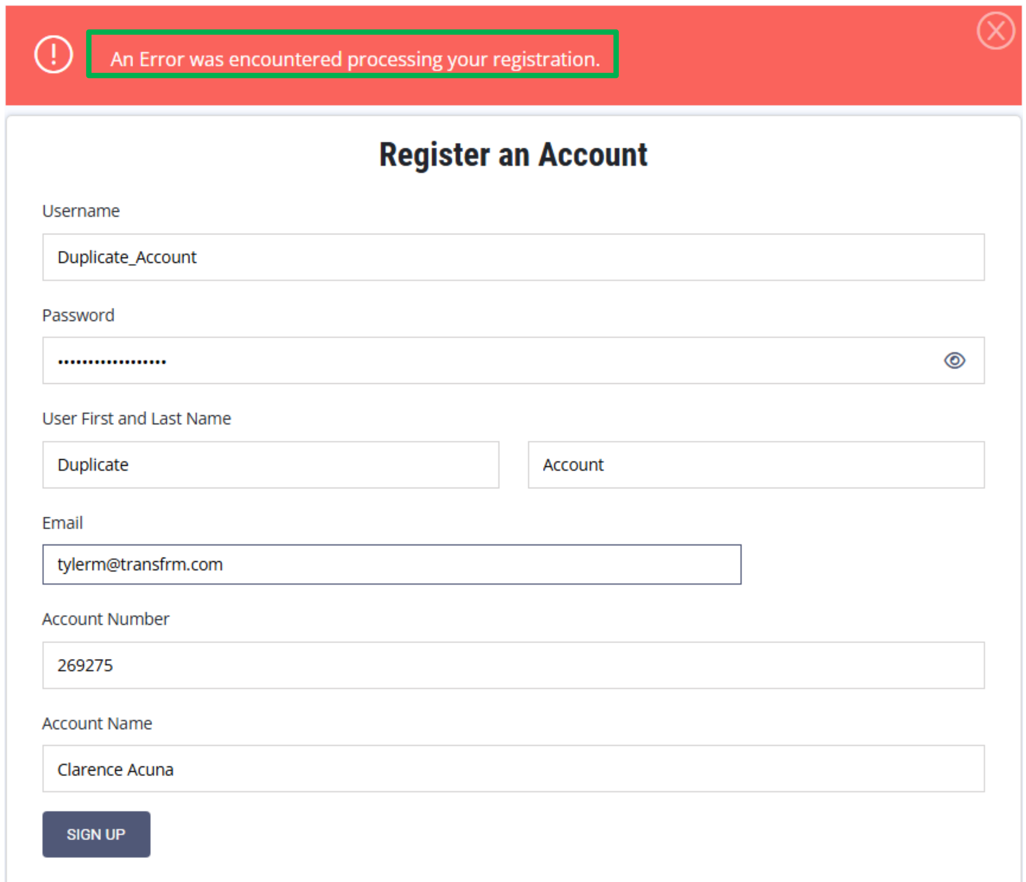
The default error message to the user will be “Username exists.”





If the custom registration error is enabled in the Registration Settings, that error message will appear instead.





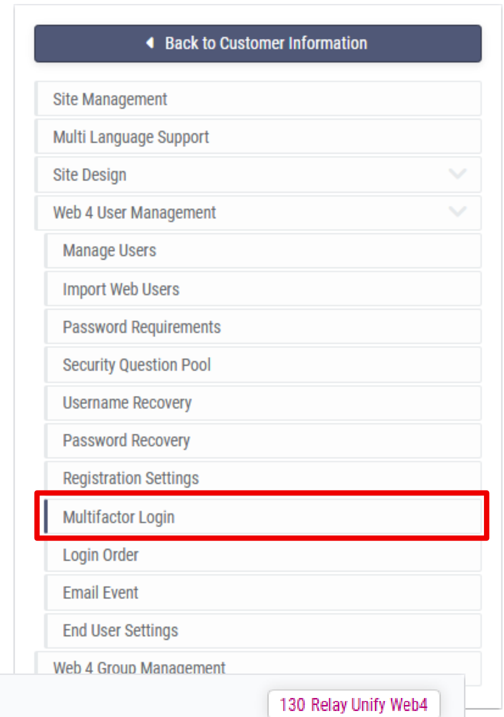
Username Limit

The username of web users is limited to 50 characters by default. This cannot be edited and is not listed anywhere in uSetup.

Multifactor Login

The ability to authenticate web users using a PIN via SMS or email when logging in to the web portal.

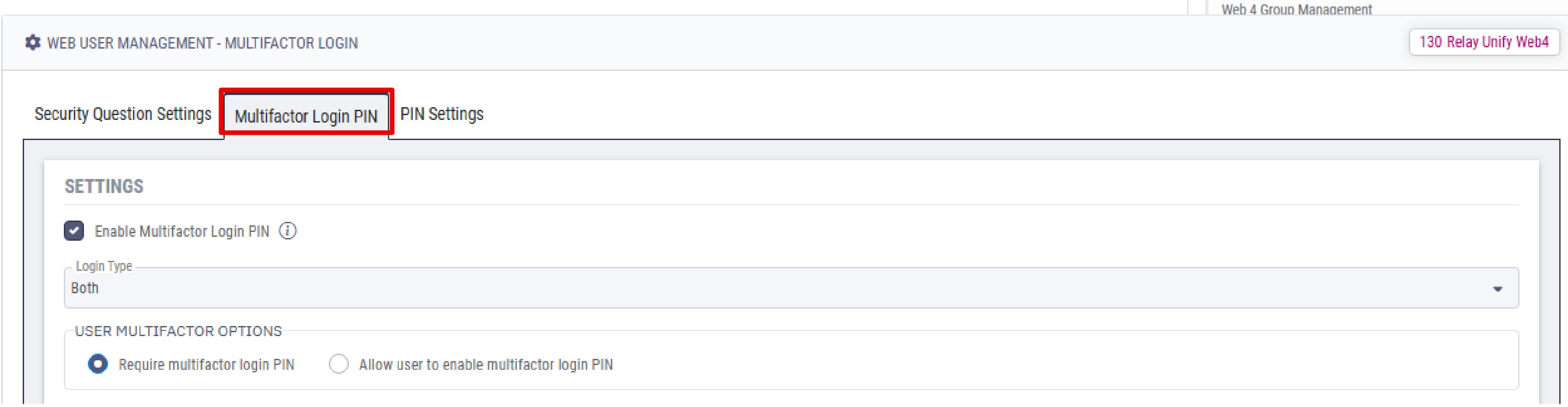
Click on the **Multifactor Login Tab** to begin to set up this feature.



To enable this feature for a site, click the **Enable Multifactor Login PIN** box.

The **Login Type** refers to the user types that will need to authenticate themselves upon login. This can be set for only admin users, non-admin users or both (all users on the site).

Select a **User Multifactor** setting. **Require Multifactor Login PIN** so the users do not have an option. Or select the **Allow user to enable Multifactor Login PIN** giving the user access to turn this on/off on the Profile Maintenance page.



Check the **Send email on multi-factor change or mobile phone change** to send the user an email notification when they opt-in or out of this setting during registration or from the profile page (if the user is allowed to enable the setting on their profile). If this is checked, set up the subject and body of the email that will be sent to the user.

The **Load Default** button will fill in the text displayed in the image.

Subject – Enter the subject of the email. Tags cannot be added to the text entered here.

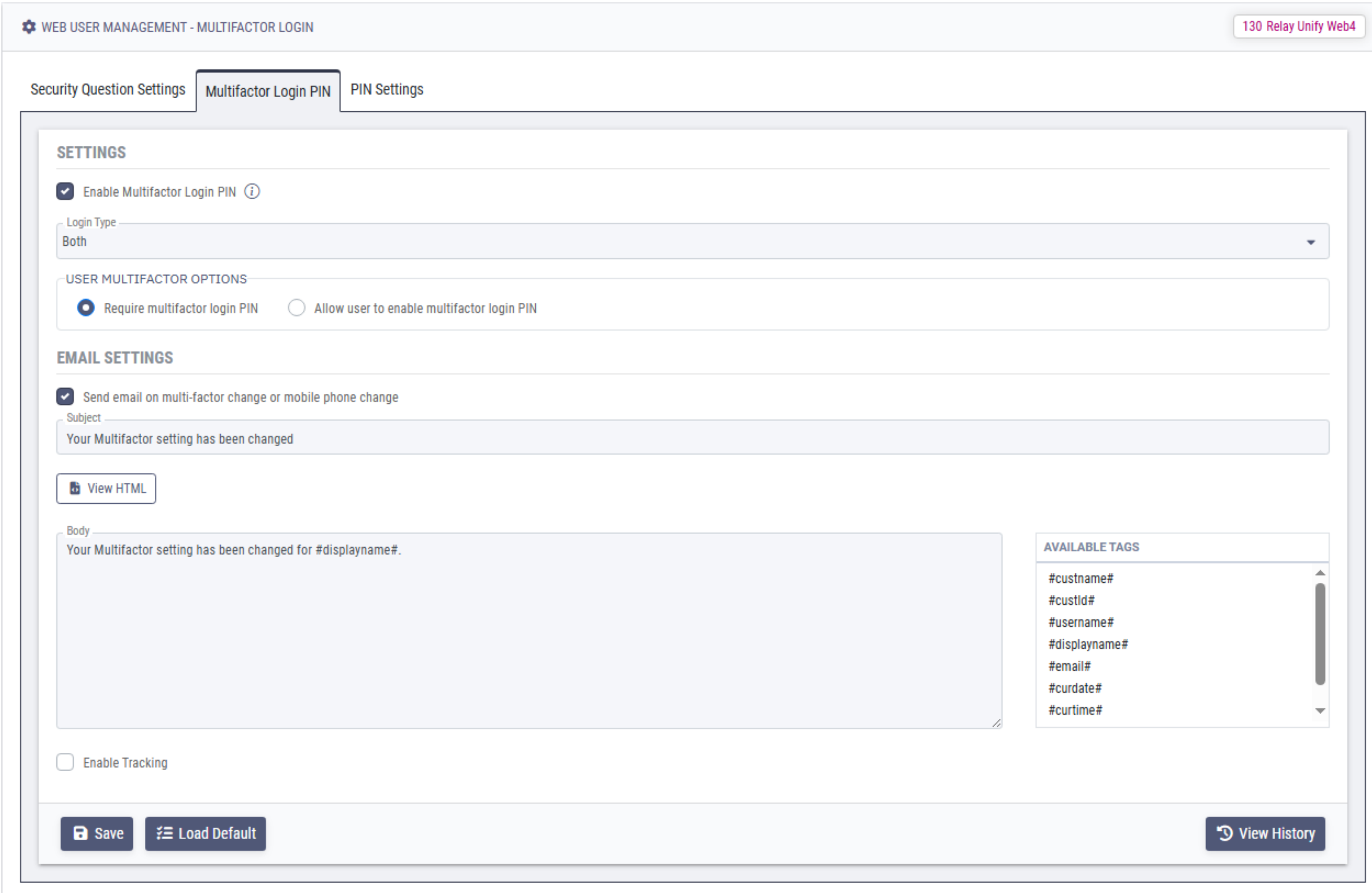
Body – Enter the body of the email. Tags can be added to the text entered here.

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

Use the **View HTML** button to preview the email.

Check the **Enable Tracking** box if using Mandrill to track this email event.

Click Save.



To set up the PIN settings, click on the **PIN Settings** tab.

The **Load Defaults** button will fill in the text ad settings displayed in the image.

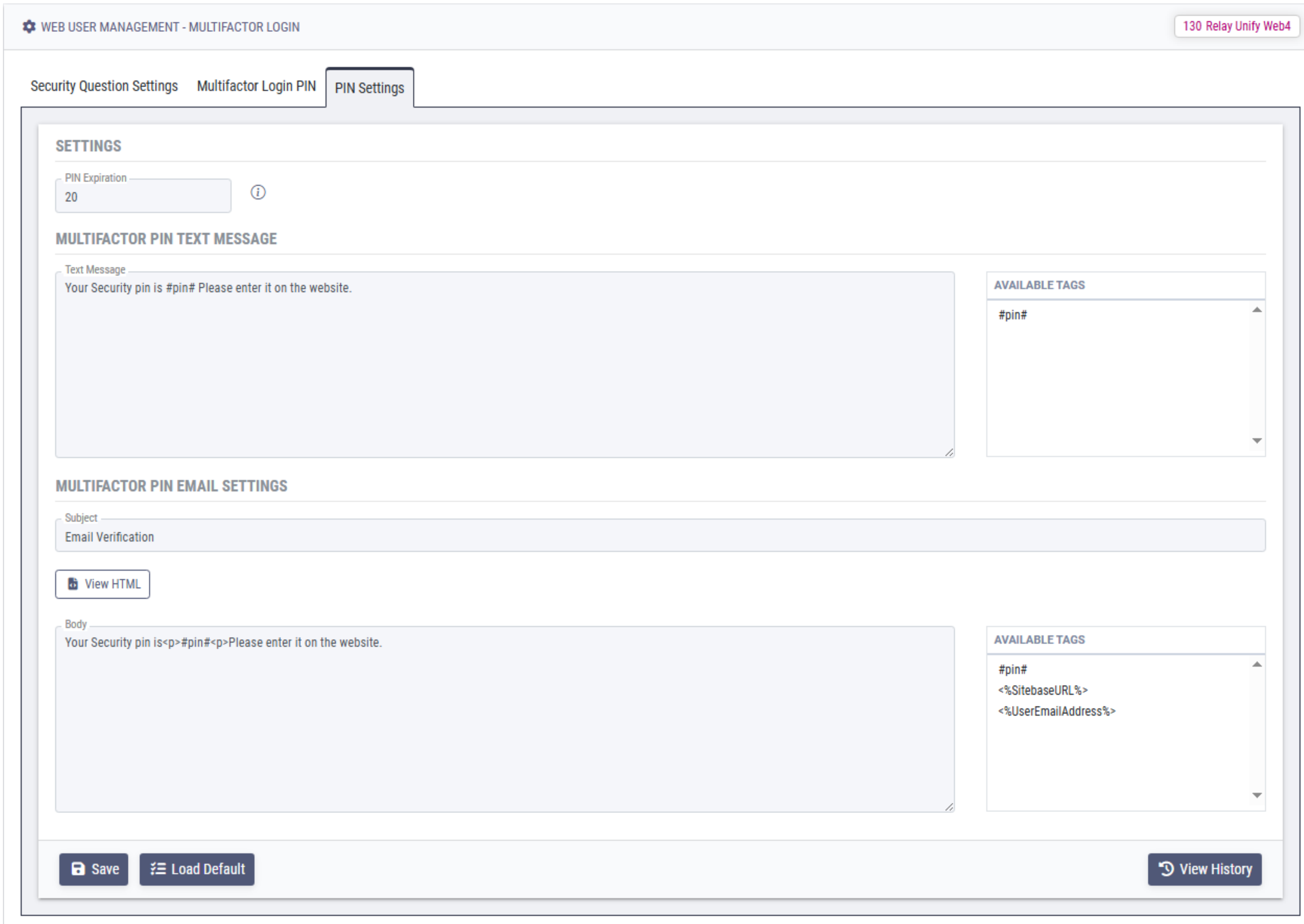
The **PIN Expiration in Minutes** is how long the PIN will be valid for the user to input as verification.

Edit the **MF PIN Text Message** and **MF PIN Email (Subject and Body)** as desired. These will be sent and contain the Pin for verification when the user selects the method of SMS or Email.

To embed a field tag into the text for the body of the email or SMS Message select a tag from the list and click the tag. The tag will be inserted to where the cursor was before the tag was selected.

Use the **View HTML** button to preview the email.

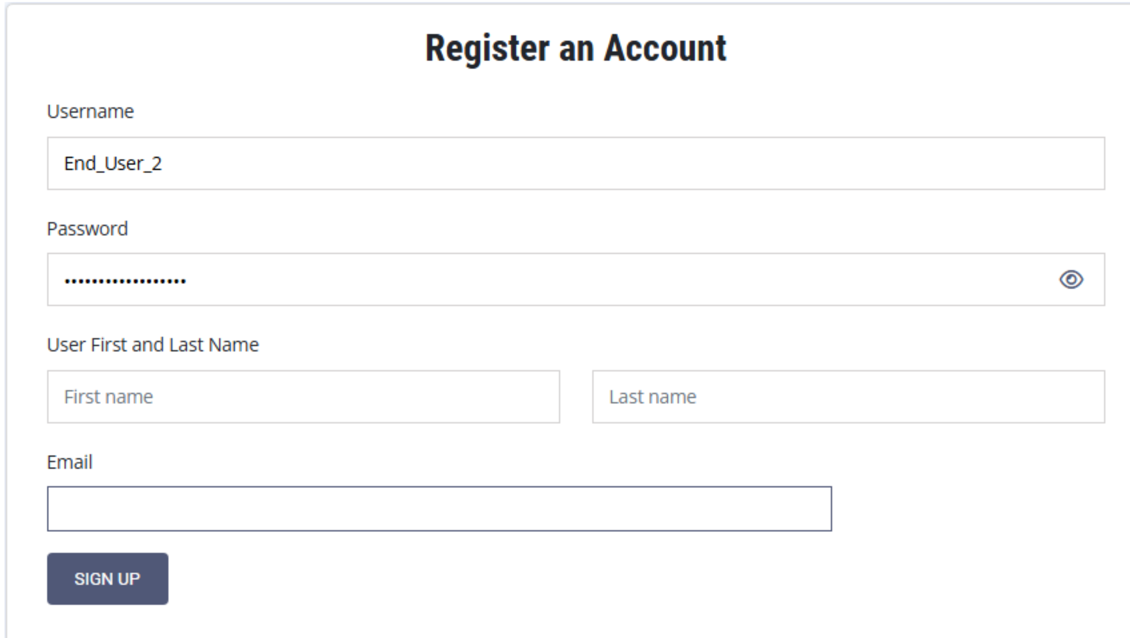
Click Save.



Registration

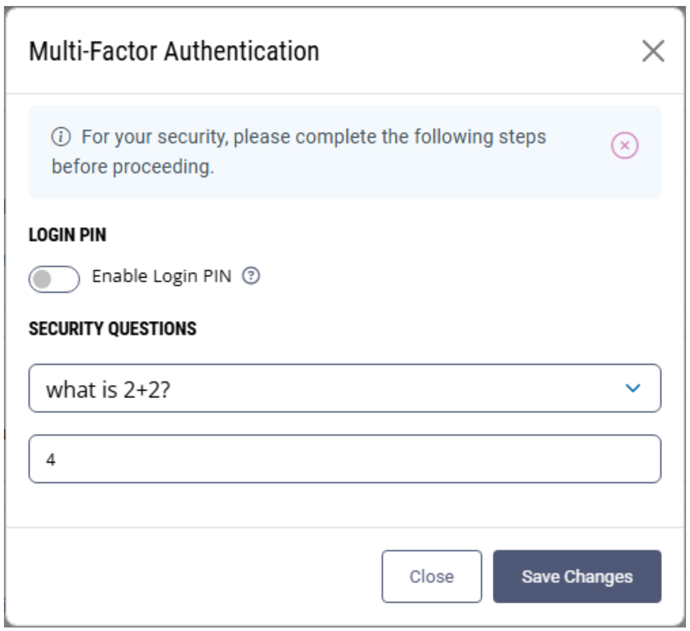
The MF Login feature only applies to the Custom Registration process. If MF Login is not enabled, the custom registration or standard registration processes will be used.

If MF Login is optional for the user (Allow user to enable MF Login PIN setting), the user will be given the option to opt-in to MF Login during the registration process.

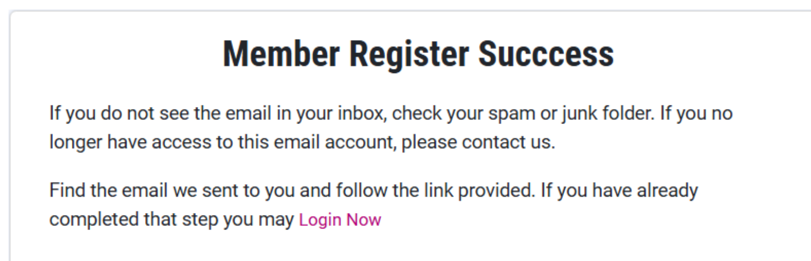


The user will enter their information to register on the Custom registration page.

The user will then be given the option to opt-in to MF Login by checking the Login Pin Security checkbox. If this is checked by the user, that will enable the setting on their profile maintenance page. The user will then be asked any Login Security Questions (setup on the MF Questions tab of web setup) that have been set up.

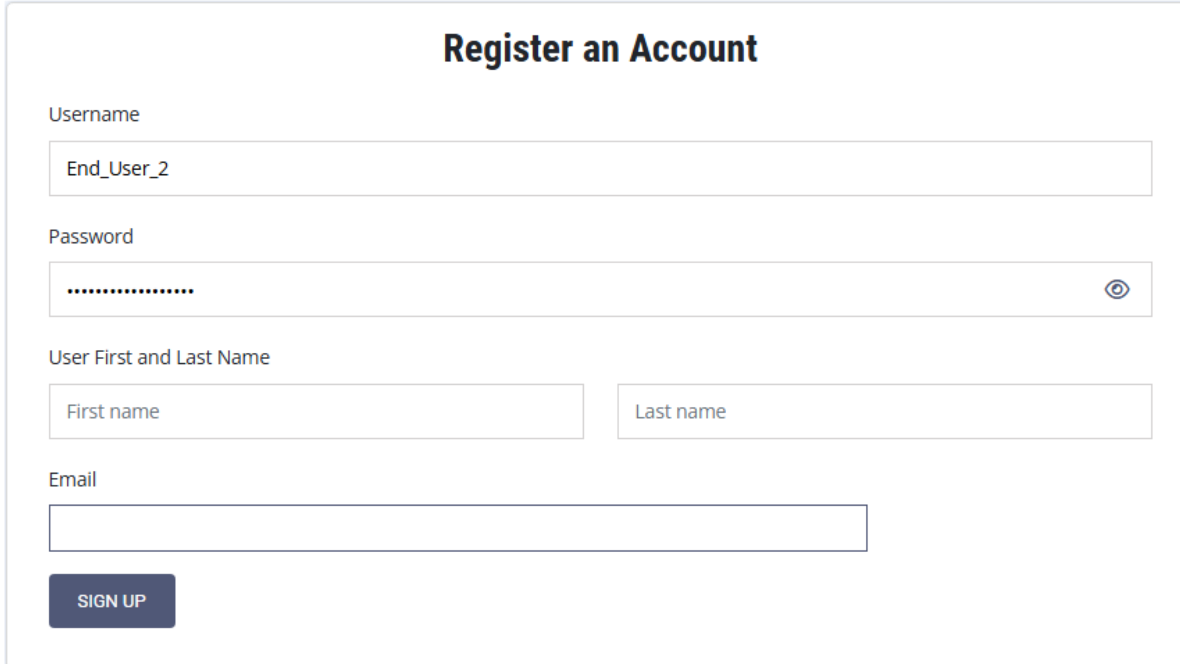


The user will then receive a confirmation message they have registered.

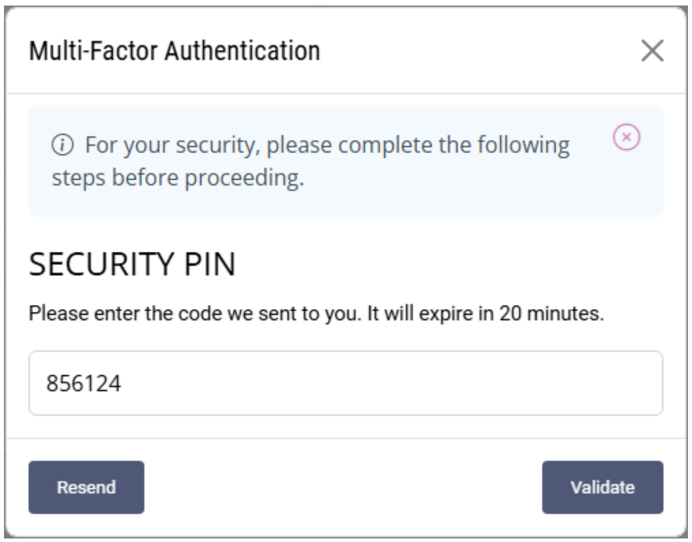


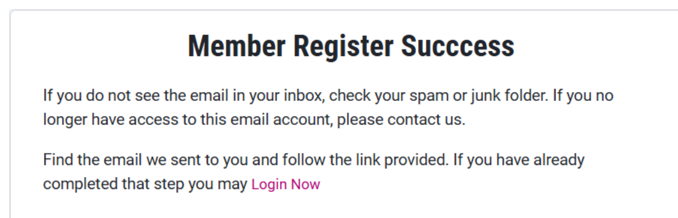
Login as the user. Complete the steps and go to the profile page.

If MF Login is Required for users (Require MF Login PIN setting), the user will need to verify an email or mobile phone number using a Pin during the registration process.



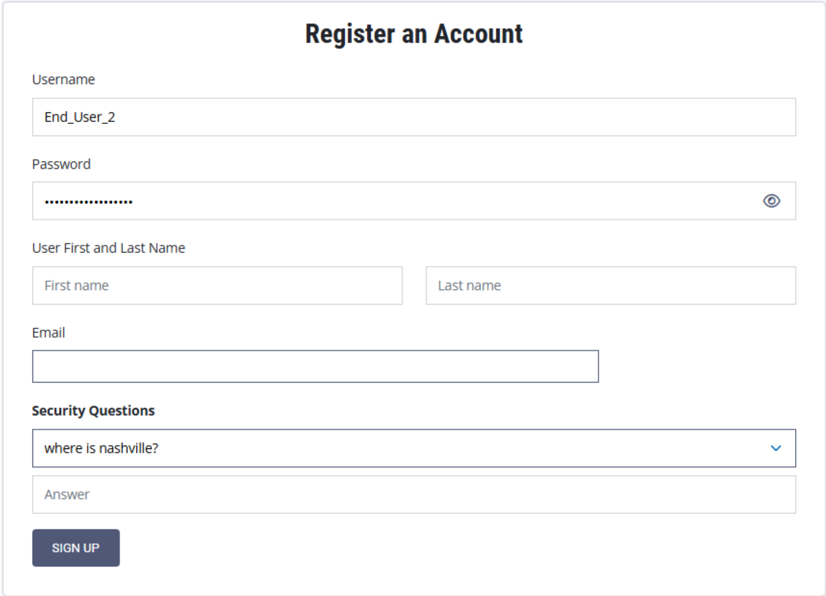
The verification of the email/mobile can be done using the registration keys (enabled on the Registration/PW Recovery Requirements tab of custom registration). If those are enabled the user will be given the option of Email and/or SMS Key buttons. If the user selects one and enters the Pin, that method will be verified for that user. The user will then be registered.



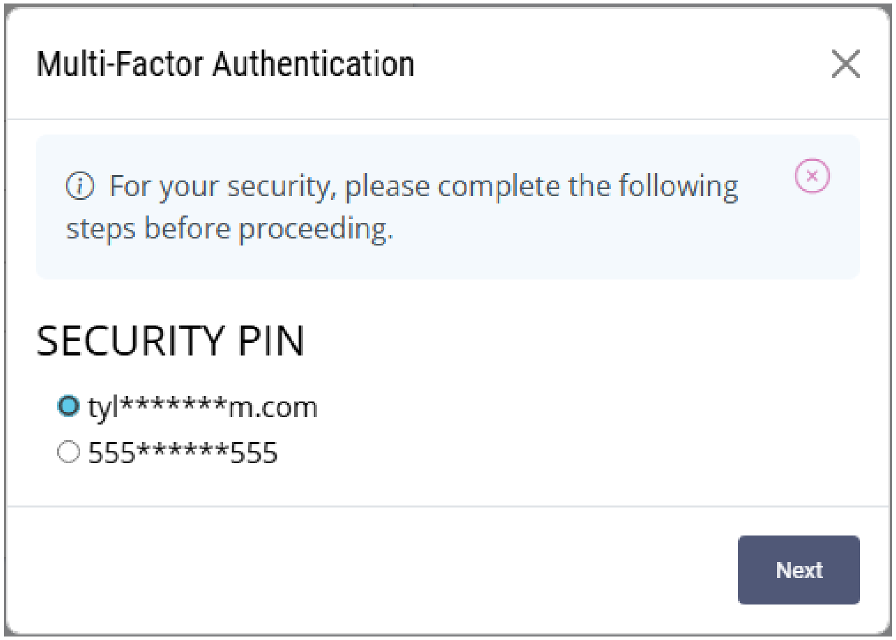


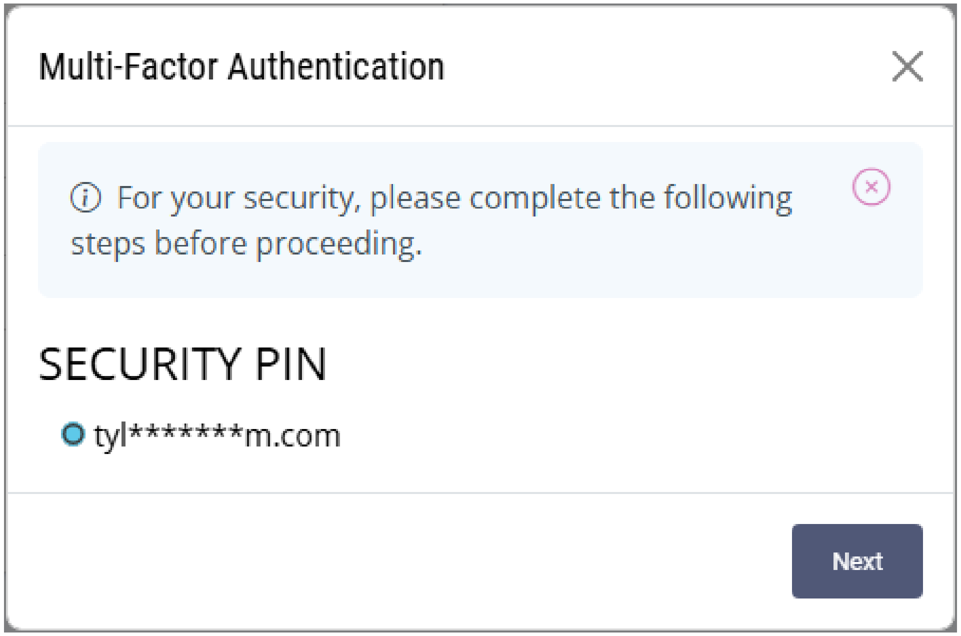
If the Registration keys are not enabled, the user will enter the information to register and verify a method later in the registration process.

Once the user enters their registration information and clicks on the Sign-Up button, they will reach the End User Landing page.



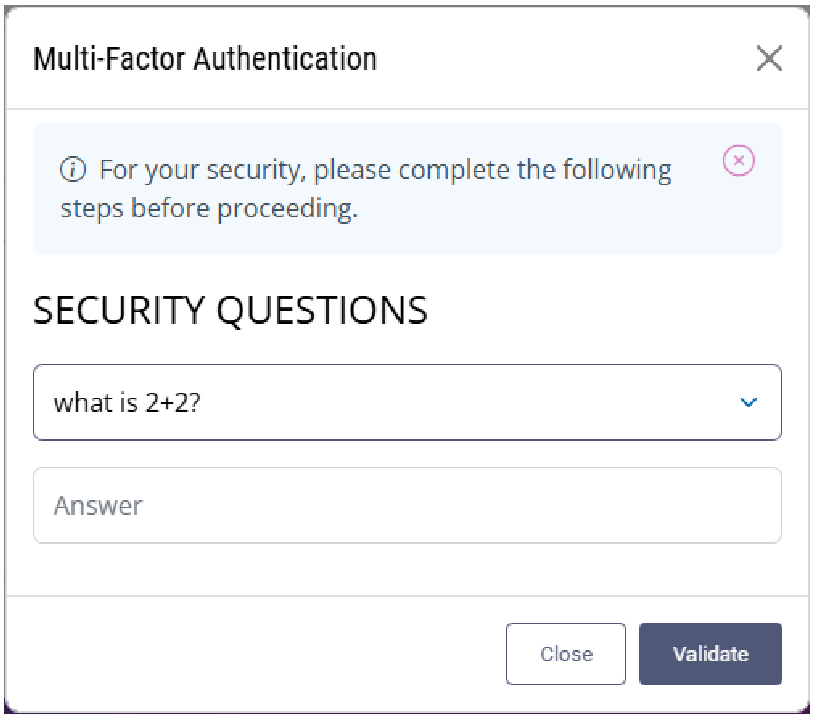
Since MF Login is required, the user is not given the option to opt-in to the MF Login setting. The user will need to select a method of verification. The email address is required on the custom registration page so it will always be one of the options for PIN verification. If the mobile number is required for registration the user will see the mobile number entered on the previous page. If the mobile was not required, the email key will be used at that time.



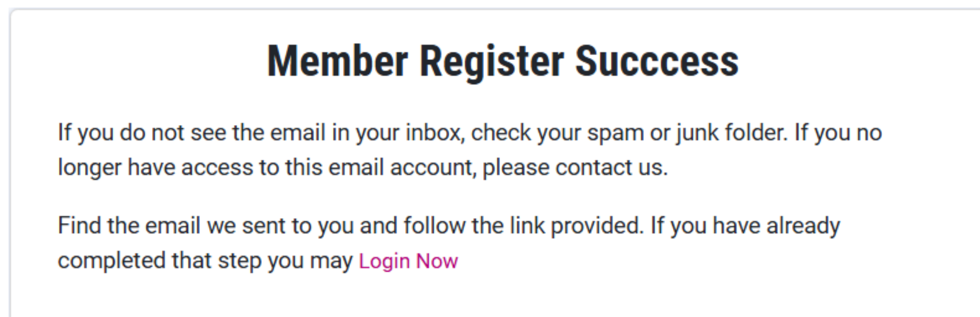


The user cannot change methods after selecting one. The user can use any pin that has been sent that has not expired. If the user cancels, the user will not be registered.

The pin will be verified second. First the user will need to answer the Login Security Questions.

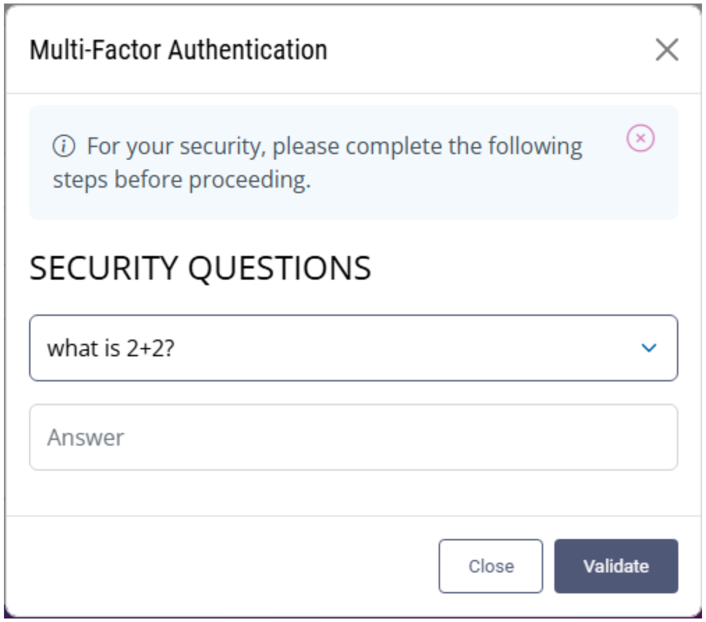


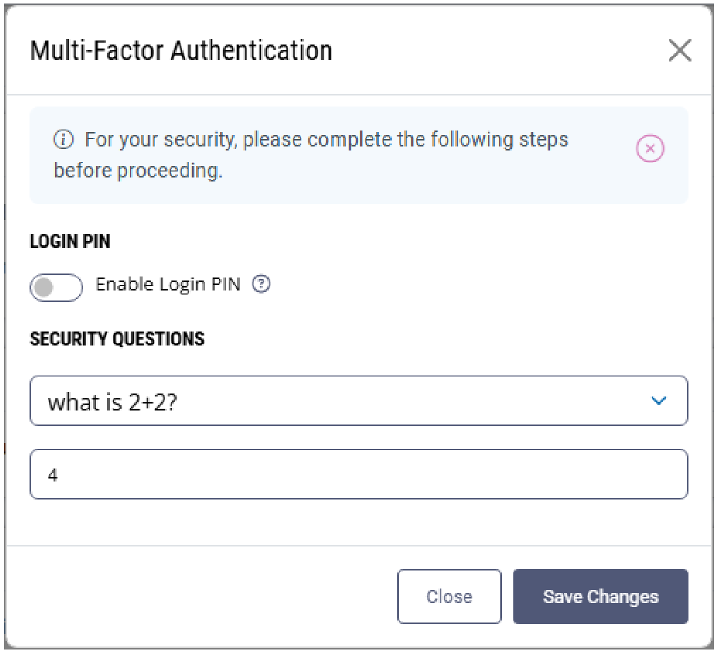
The user will then receive confirmation that the registration process is complete.



Login Process with Multi-Factor Pins

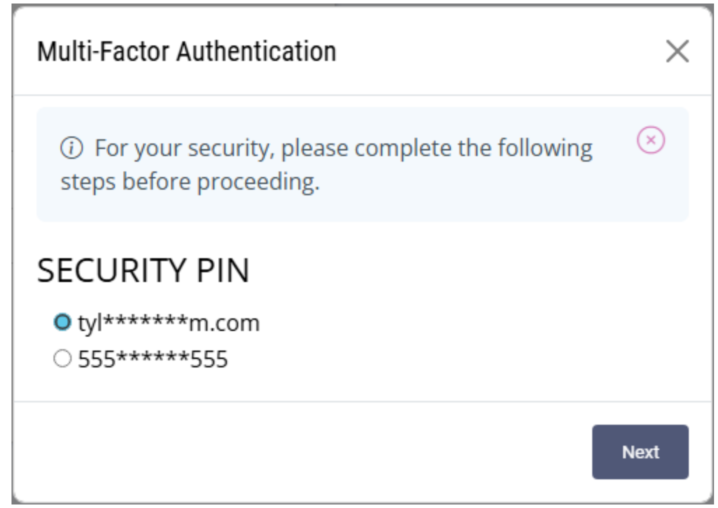
If the Multifactor questions (enabled in web setup under the Multifactor Login Tab) are enabled, those will be asked of the user first to authenticate the user.



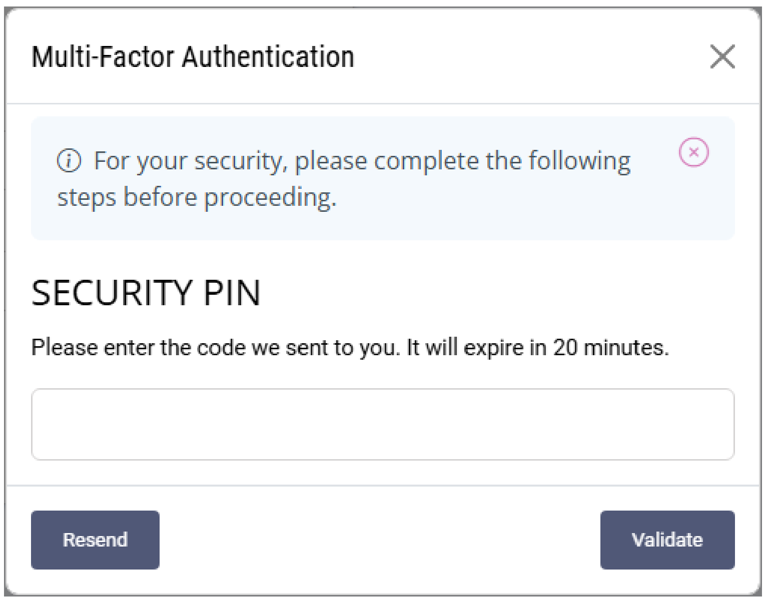


If multifactor is not required or enabled for that user if the setting is optional, then the user will be directed to their landing page. If the user has never been given the option to opt-in to the MF login process or never confirmed their email/mobile with a PIN during registration, the user will be asked after logging in and going to Manage Profile > Security Settings > Multi-factor Authentication section.

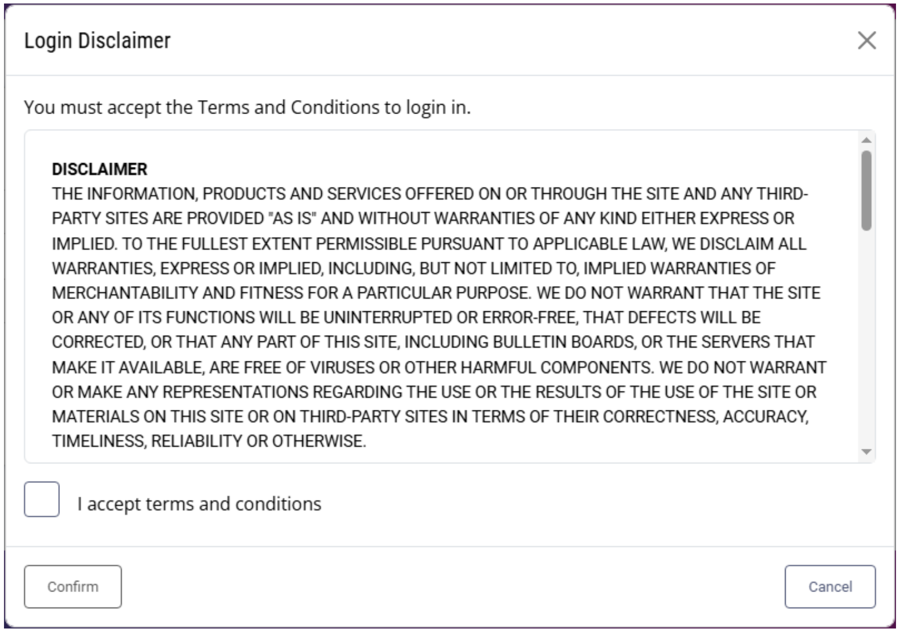
If multifactor is required or enabled by the user, the multifactor login process requiring the user to authenticate with an email or SMS pin will be required prior to the user being directed to their landing page.

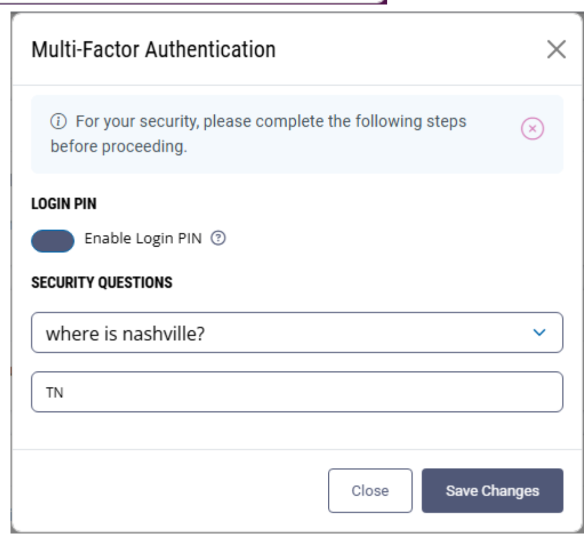


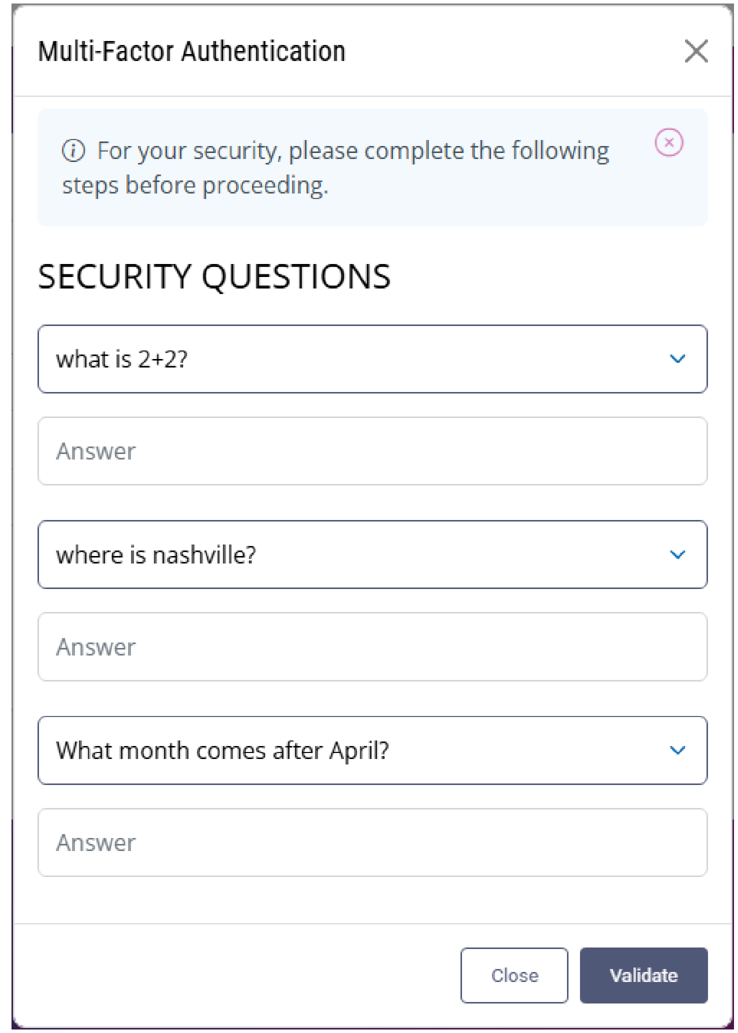
The mobile/email from the user's profile will be listed. Once the user selects a method, the pin will be sent. There is no maximum number of pins that can be sent. The user will need to enter one of the pins to login. Any of the non-expired pins can be used.



Depending on the other settings enabled for the web portal and the Login Steps order set, the user may step through these pages as part of the login process too.







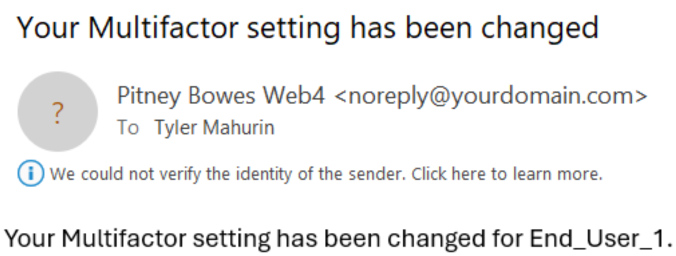
Profile Maintenance

If Multifactor Login is not enabled, the profile page functionality will remain the same.

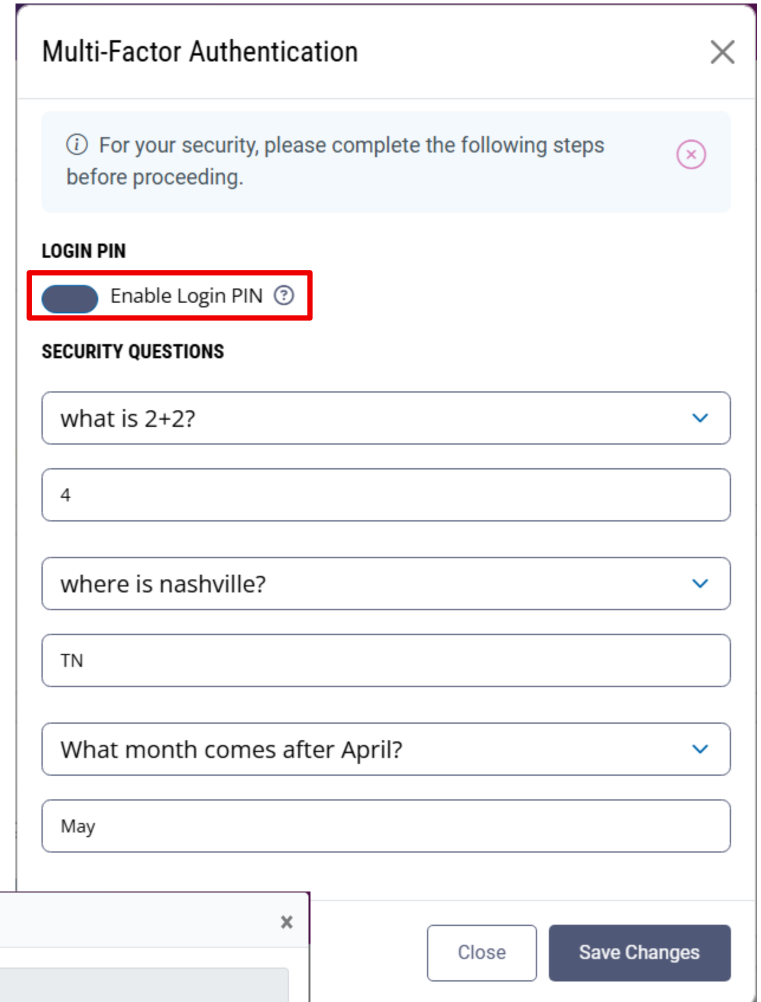
If Multifactor Login is required, the user will authenticate their email/mobile during registration/login. The Multifactor Login setting on the profile page will not be visible to the user to change.

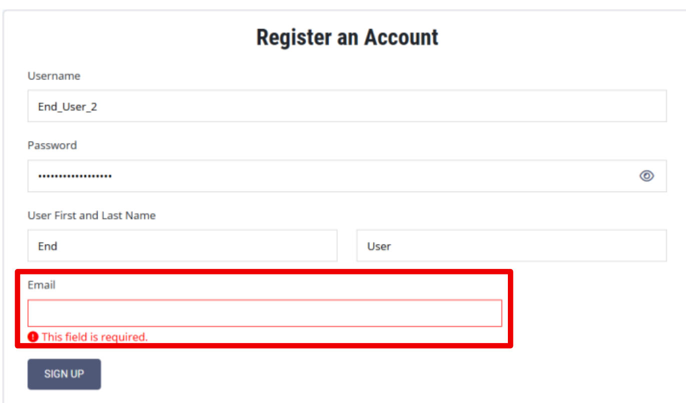
If Multifactor Login is optional for users, the Multifactor Login setting will be visible on the profile maintenance page for users to turn on and off as desired. This setting cannot be seen or edited by an admin user.

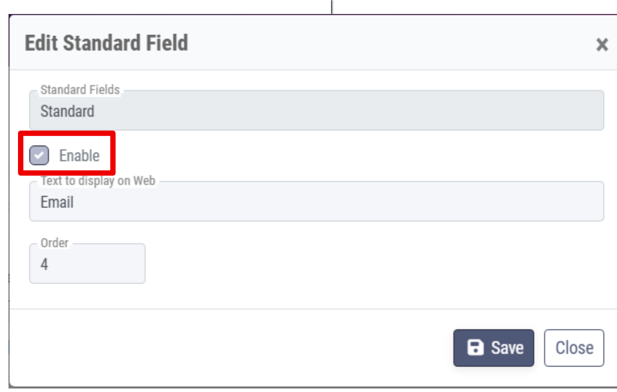
If the user enables/disables the Multifactor Login setting, the Multifactor Email indicating the setting has changed will be sent. This can be customized in uSetup Web under the Multifactor Login Tab > Multifactor Login PIN.



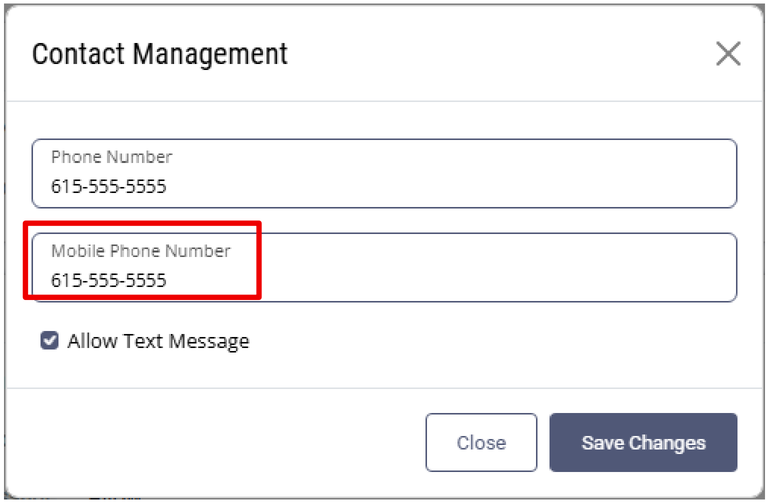
The user must enter an email address in while self-registering. There is no ability to pass this up and enter an email address later.

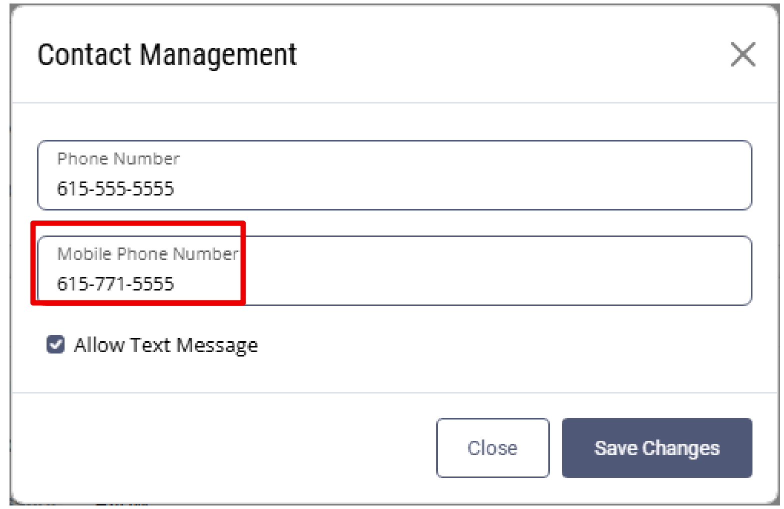


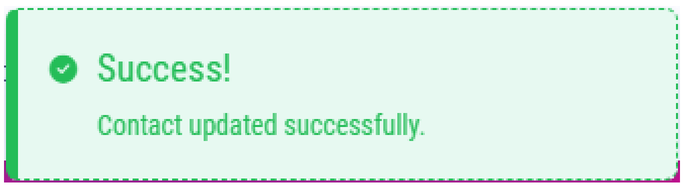




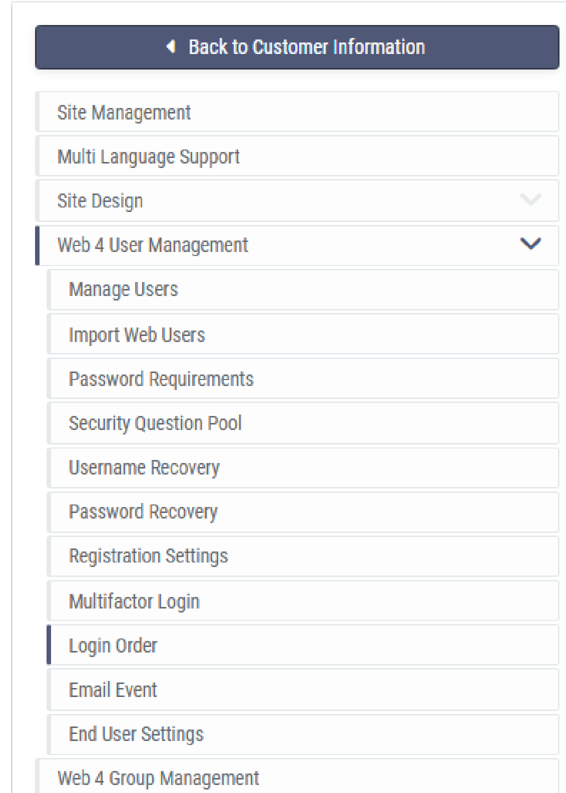
If Multifactor Login is required or turned on by the user, the mobile and email will need to be verified if required during registration. Any changes to the mobile number does not need to be verified. The user cannot change their email address after registering. At that point, the user will receive a success notification that their mobile number or phone number has been changed.







Login Steps



These are the steps or pages a user sees during login. Not all the pages apply each time a user logs into the portal.

To access or edit the order, click on the **Login Order** tab under the Web 4 User Management Dropdown on a customer's web setup.

Click on the **Reset Default Order** button to reset the order to the default order. The default order is shown here.

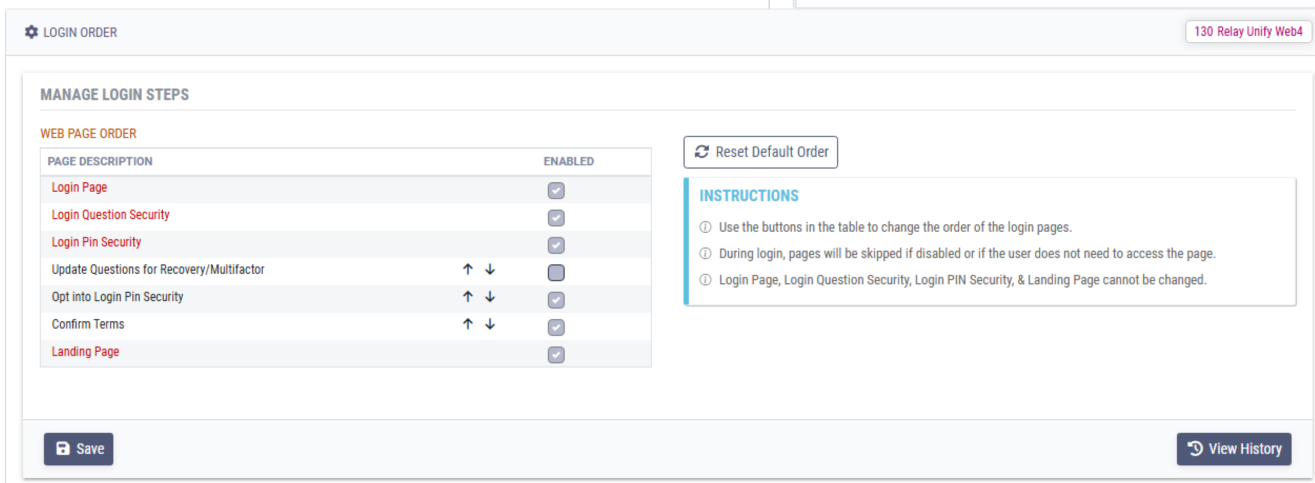
The Login Page must be first, and the Landing Page must be last. The Login Question Security and Login Pin Security authenticate the user if Multifactor Login is enabled so those cannot be changed. The others can be reordered using the arrow buttons.

Update Questions for Recovery/Multifactor is part of the Security Question option under the Registration Requirements.

Opt into Login Pin Security is part of the Multifactor Login Settings.

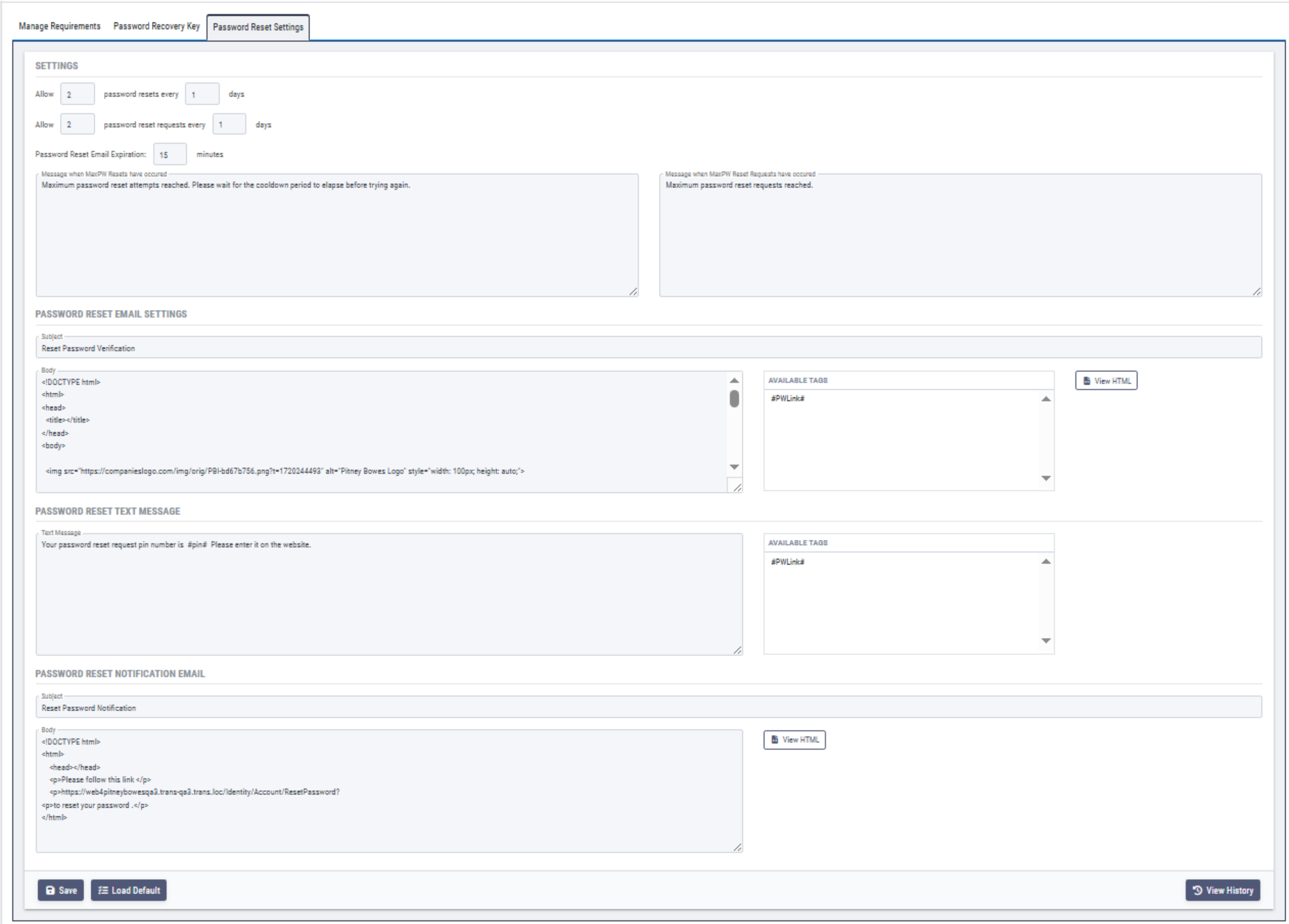
Confirm Terms is the disclaimer page.

If any of the pages/features are not enabled, they will be displayed without a check in the Enabled column.



Password Reset Changes

This can be set up in the Password Recovery Tab on the left, then click on the Password Reset Settings Tab on the top of the window.



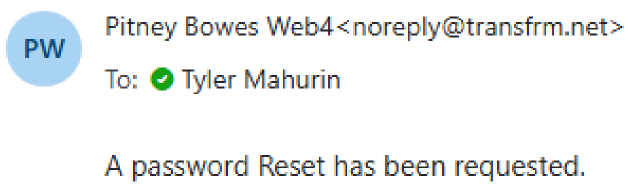
These settings are in addition to the Password Recovery Key and Registration Settings Tabs.

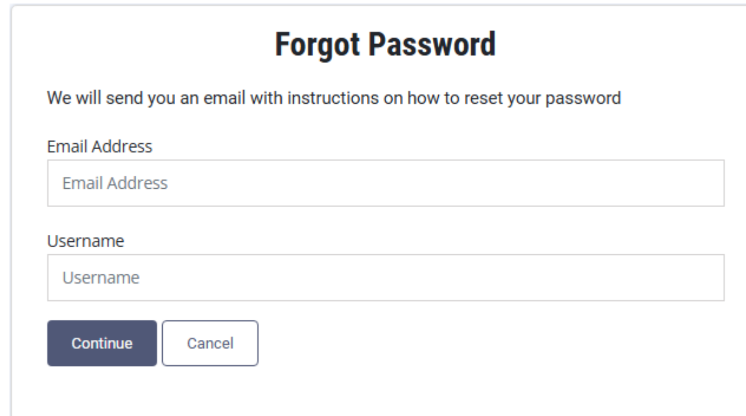
This feature for a client's web portal is always active.

The **Allow Password resets every X days** value will determine how many times a user can change their password during that time interval.

The **Allow Password Reset requests every X days** determines how many times a user can click on the Forgot Password link on the Home page and enter their username to begin the PW reset process. Each time the user clicks Forgot Password and enters the username, it will trigger the **PW Reset Notification Email** to be sent to the user's email.

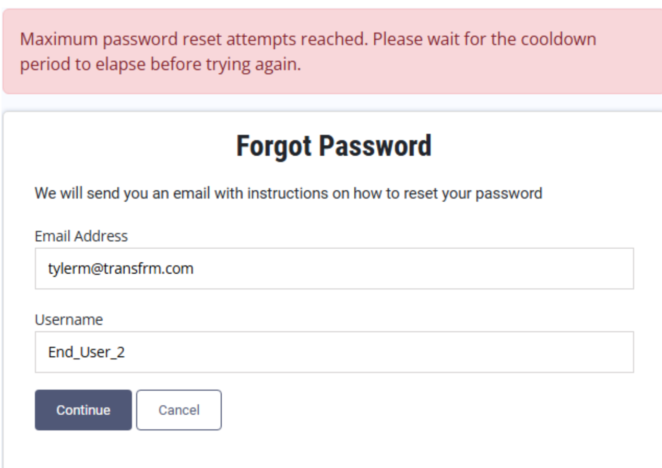
Click the **Load Default** button at the bottom to populate the values shown. These can then be edited as desired.

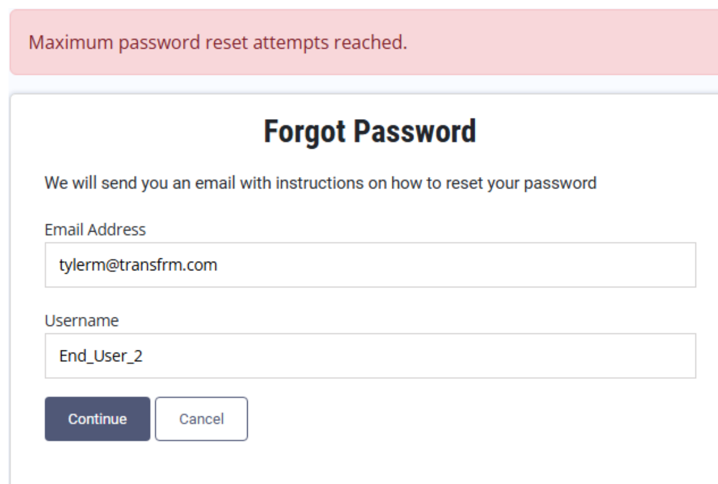




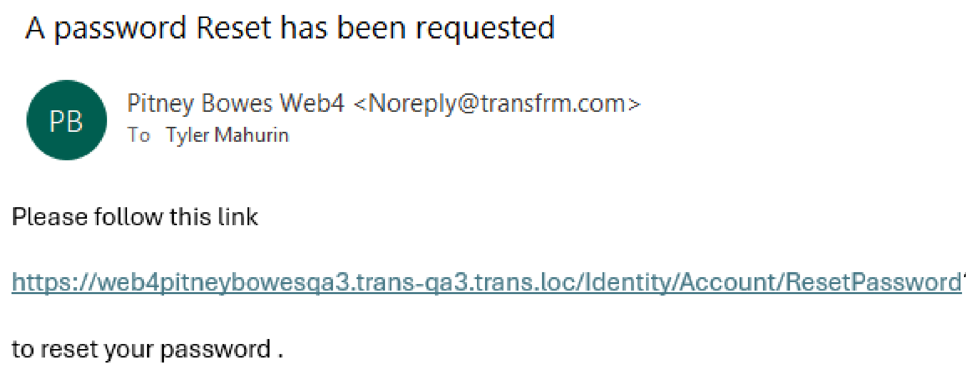
When the user clicks Forgot Password, the user is prompted to enter their username and email linked to their account.

If the Max Password Resets or reset requests have been reached, the corresponding error message will be displayed. The user will then have to wait until the number of days entered for that setting has passed or contact an admin/CSR user.

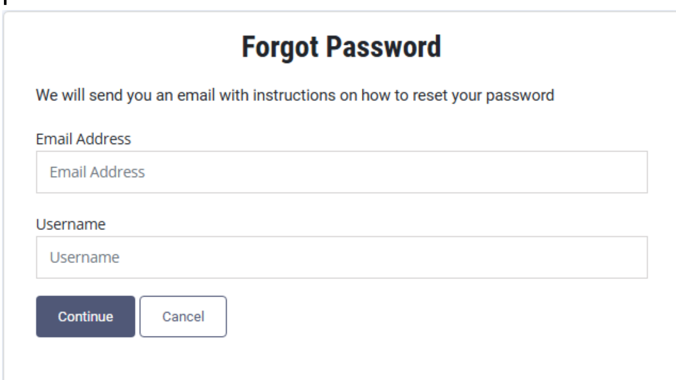




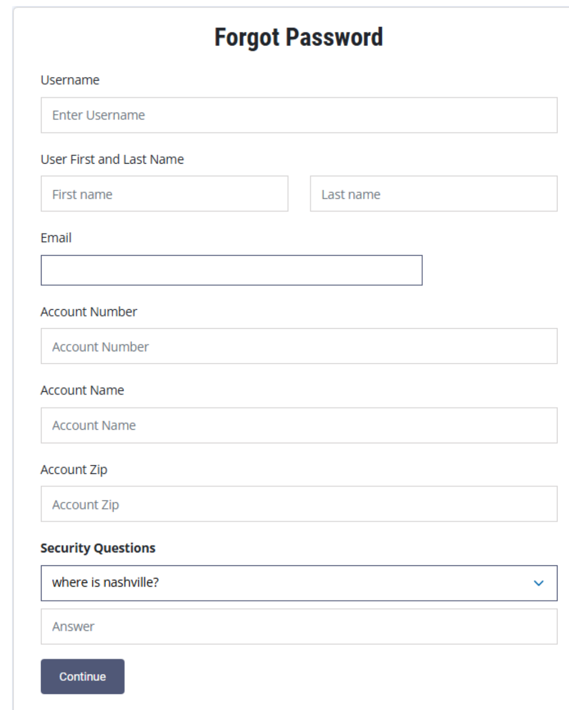
If an Admin/CSR user resets an admin user's password from their profile maintenance page, that will send the **PW Reset Notification Email** alerting the user that their password has been changed.



If the user does not have the PW Recovery questions answered, then it will direct the user to receive a PIN for verification. The Email and SMS are configured using the **PW Reset Text Message** and **PW Reset Email.** The user will be given options based on the email/mobile settings on their profile.



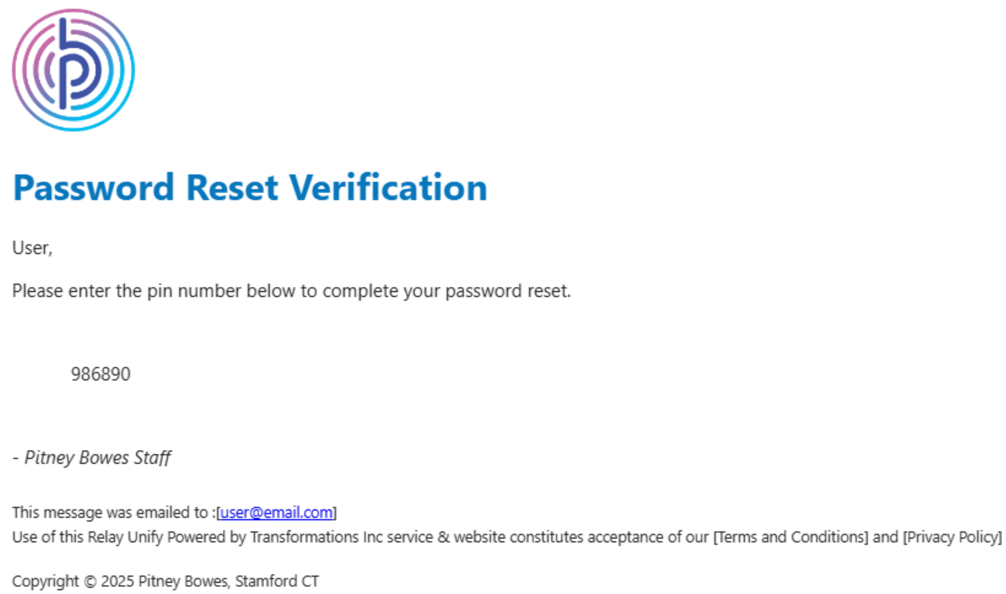
If an admin or end user clicks on Forgot Password, the username and email must be entered to allow the system to verify the account exists.



If the user is an admin, it will display the same PW recovery fields as end users. These fields are defined on the Password Recovery Tab > Manage Requirements. If there are no Pins enabled for PW Recovery then the user will enter the information, and the PW will be reset.

If keys are enabled for PW Recovery then the user will select to receive the Pin via SMS or email. The pin will be sent using the message set up on the Password Recovery Key Tab at the top.

The user will enter the key and then receive the confirmation that the PW has been reset.



Password Reset Verification

User,

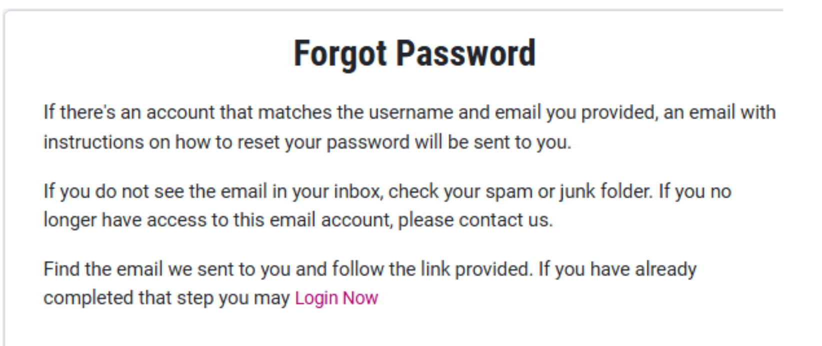
Please enter the pin number below to complete your password reset.

986890

- Pitney Bowes Staff

This message was emailed to :[user@email.com]
Use of this Relay Unify Powered by Transformations Inc service & website constitutes acceptance of our [Terms and Conditions] and [Privacy Policy]

Copyright © 2025 Pitney Bowes, Stamford CT



Forgot Password

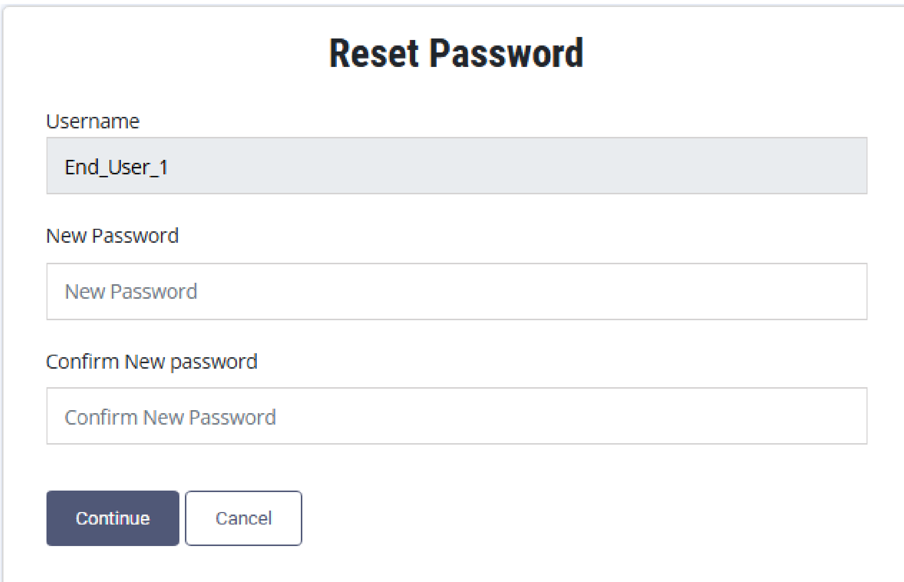
If there's an account that matches the username and email you provided, an email with instructions on how to reset your password will be sent to you.

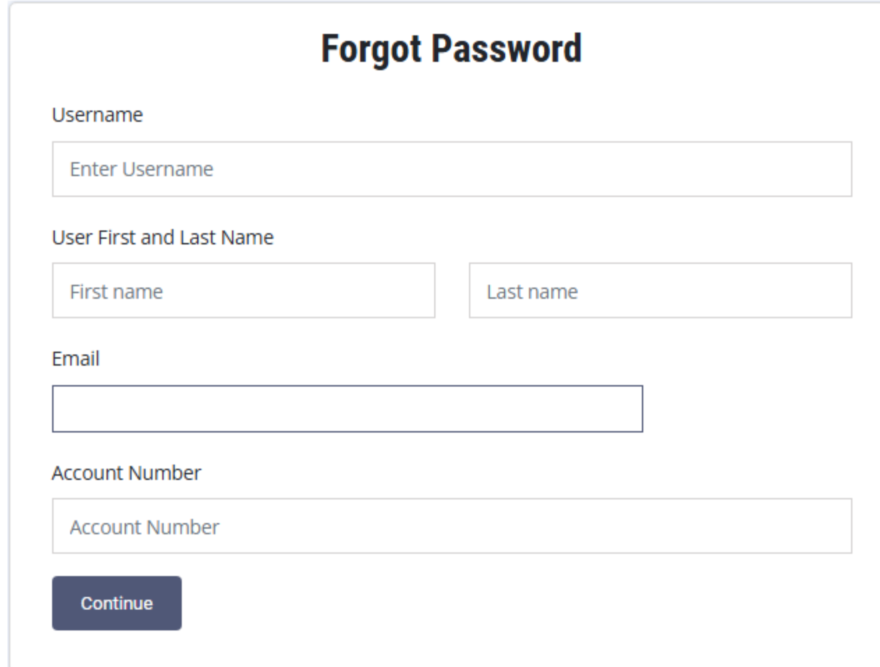
If you do not see the email in your inbox, check your spam or junk folder. If you no longer have access to this email account, please contact us.

Find the email we sent to you and follow the link provided. If you have already completed that step you may Login Now

If an end user has not set up their PW Recovery settings, they will go through the PW reset process as if PW Recovery and PW Reset were not enabled.

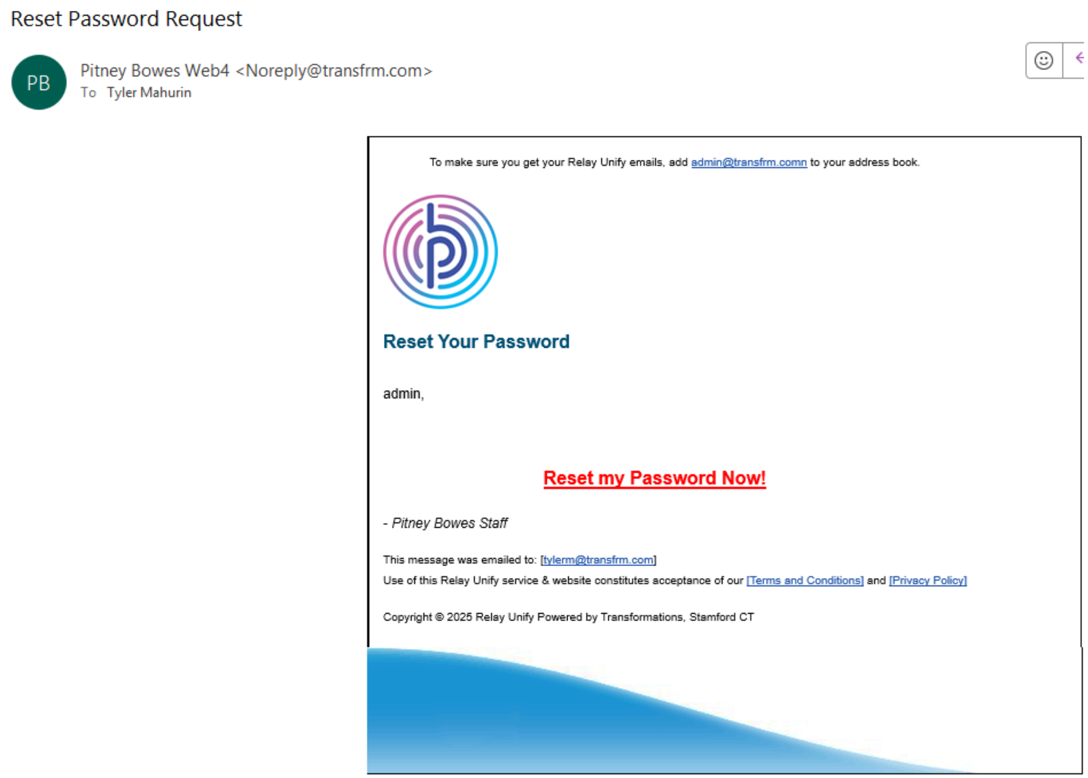
The user will be sent an email with a link to reset their PW that will direct them to this page.

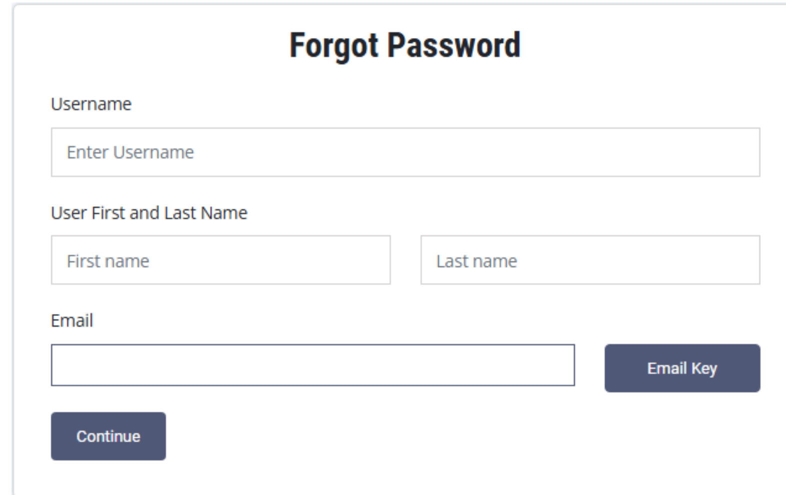




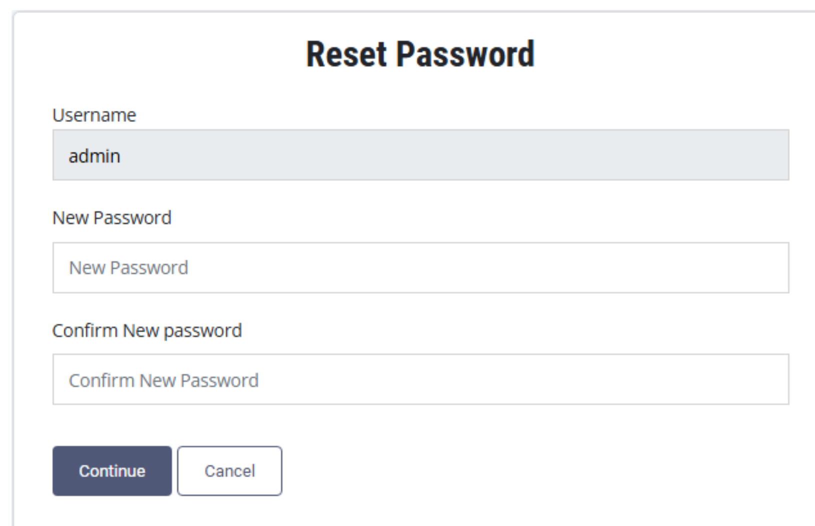
If an admin user has not set up their PW Recovery settings, they will also be sent a Password Recovery email, same as an End User.

The user will be sent the same PW Reset Email.

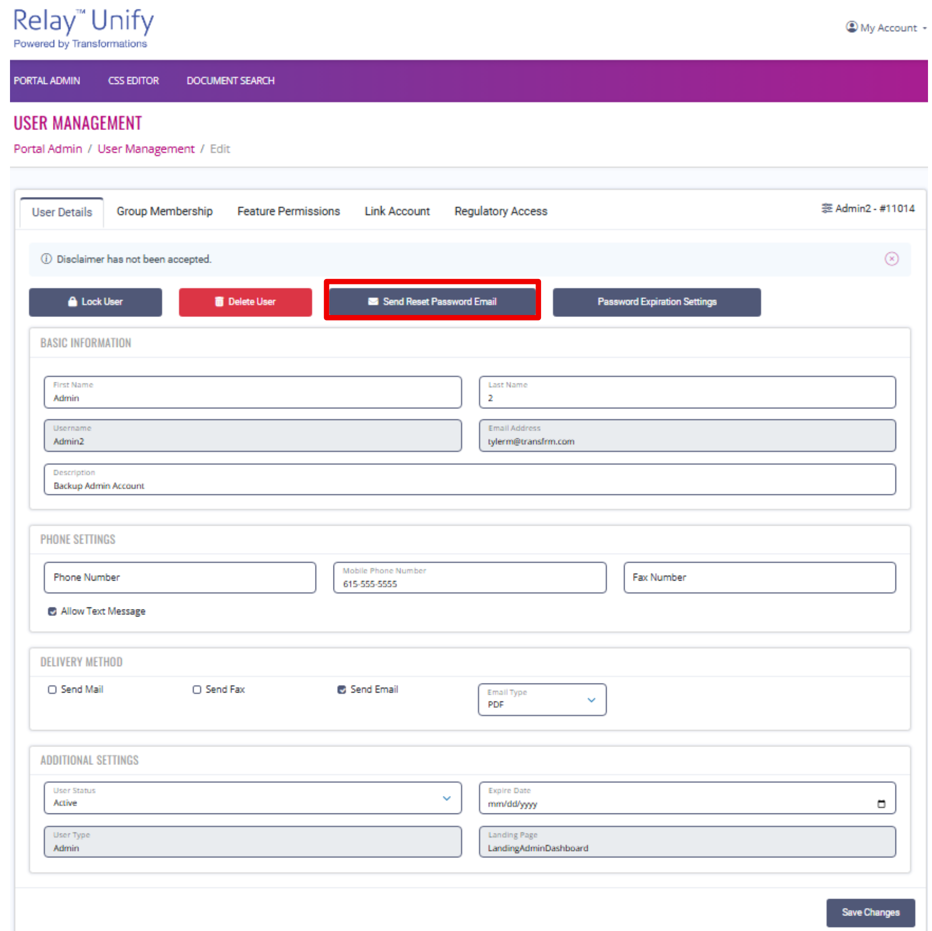




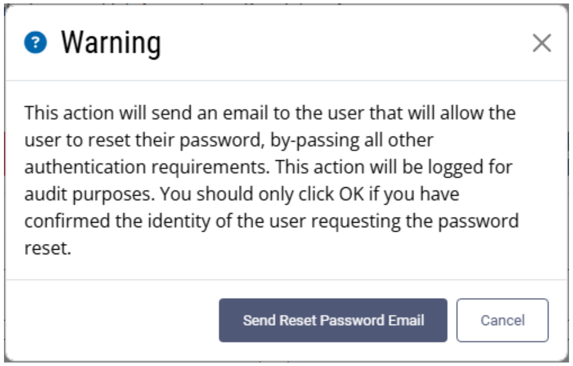
The user can click the link to be directed to this page to reset their PW.



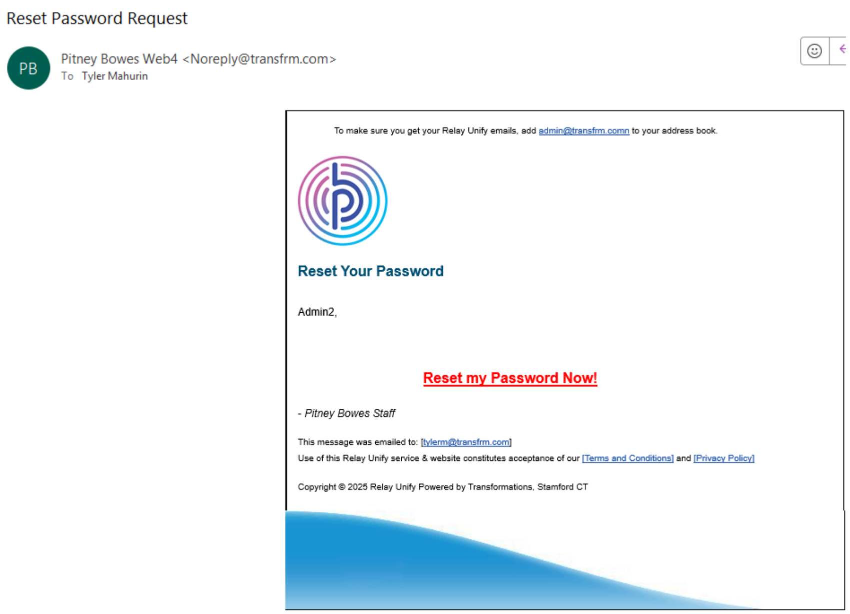
The Password Reset can be initiated by an Admin/CSR user on the user's profile page by clicking the **Send Reset Password Email** button.



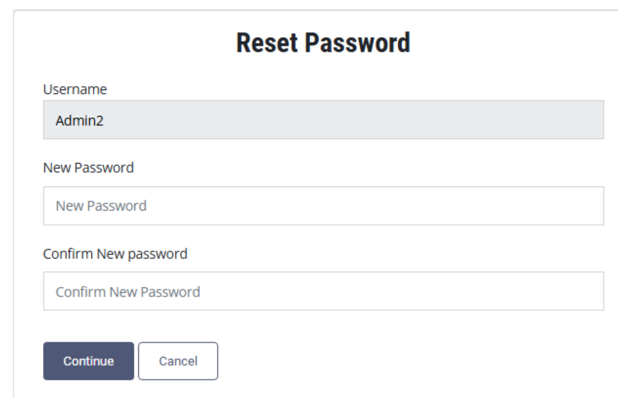
If the user is an admin user there will be a warning that this will be done using an email with a link to change their password.



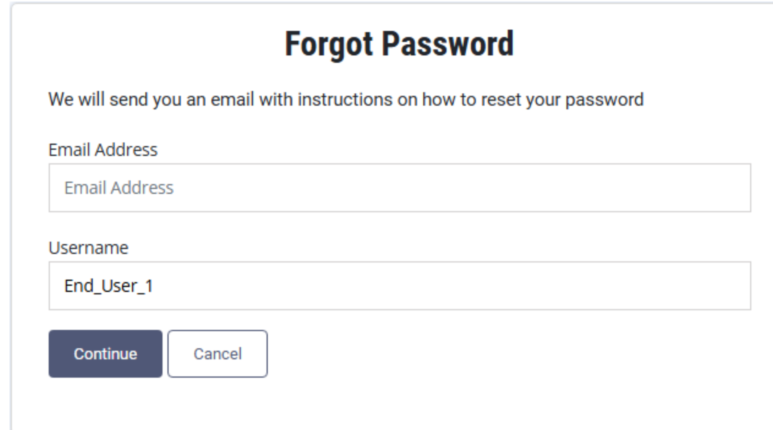
The user will receive the PW reset Email with a link that will direct them to reset their password.



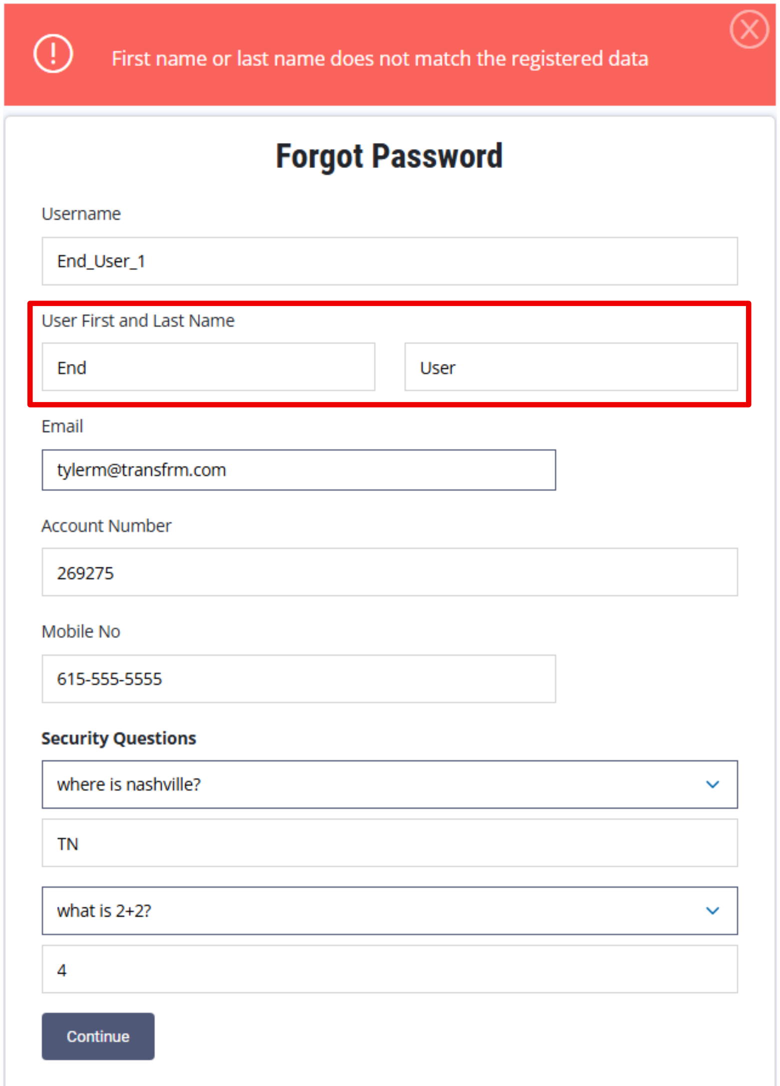
If the settings on the Password Reset Settings tab are not enabled, the original process for PW Recovery will take place.



Once a user clicks on the Forgot Password link on the Home page, the user will need to enter their username, and email address.

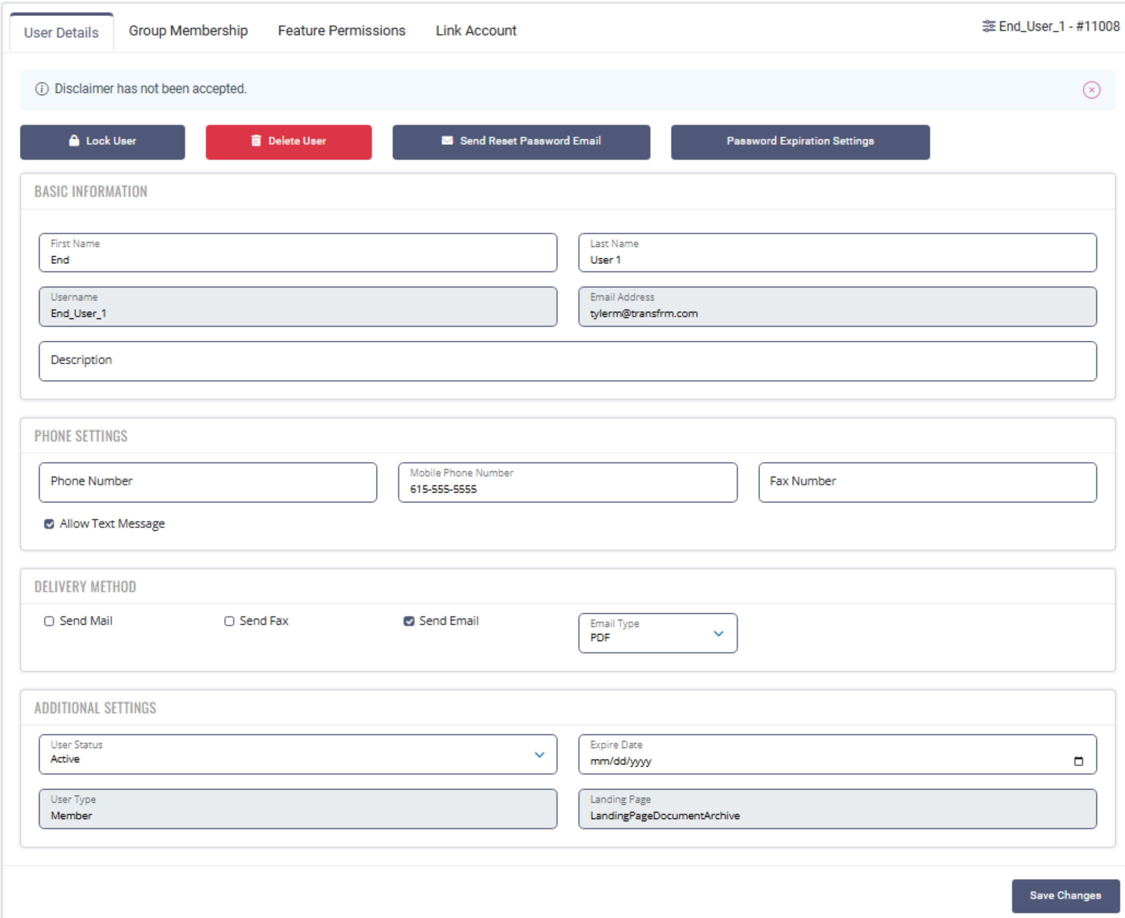


Both admin and non-admin users will be directed to the same page for their PW Recovery settings.

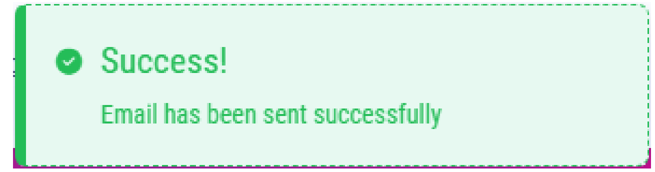


If the user enters the correct Recovery information, their password will be reset.

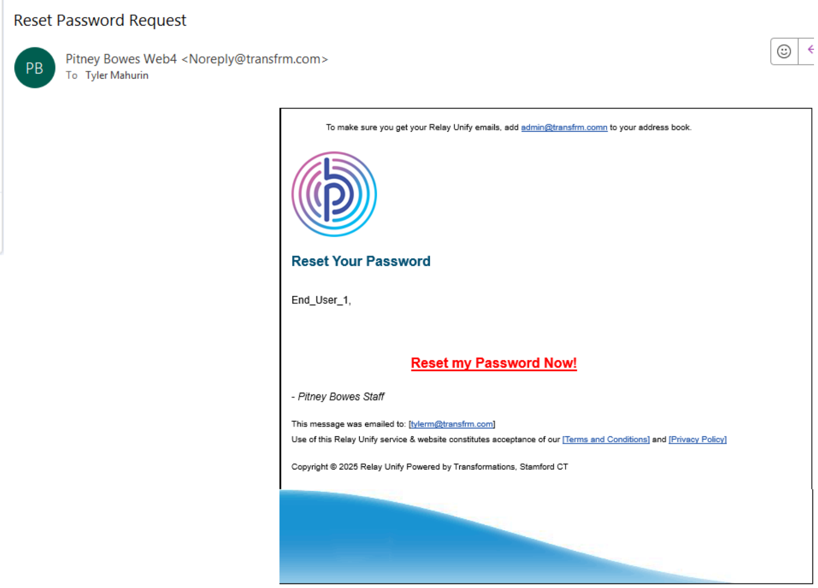
Admin users can still go into a user's profile maintenance and send a Password Reset email.



The Admin will get a confirmation notification.



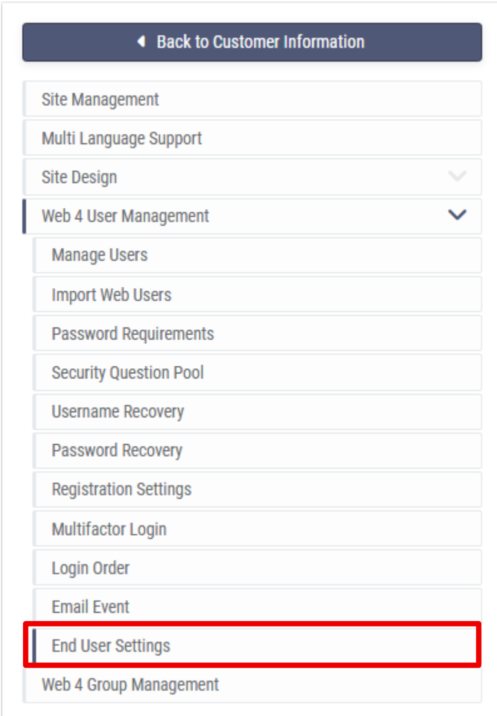
Then an email will be sent with a link to the Account Recovery page.

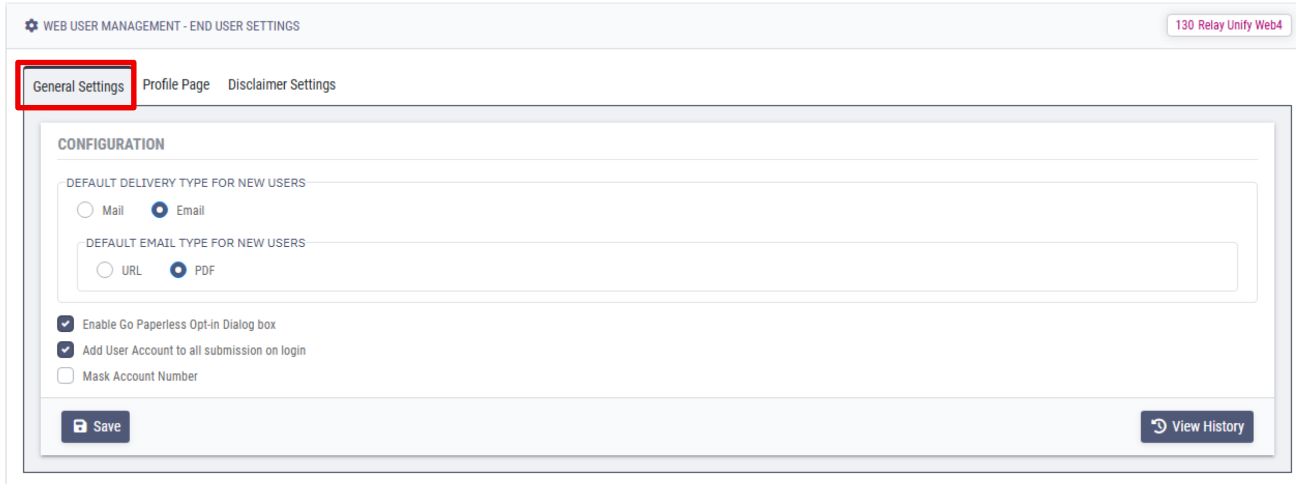


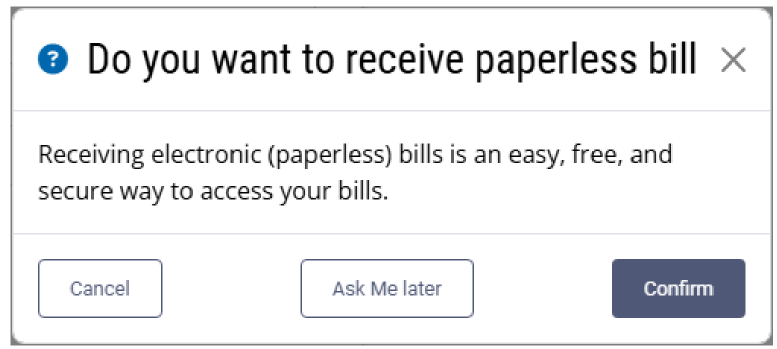
Standard User Experience

End User Settings

GENERAL SETTINGS TAB







This screen has some default settings for user delivery methods.

Enable Go Paperless Opt-In Dialog Box – If this is checked, a user that has Send Mail as a delievery option checked will have this screen displayed upon logging in to the site.

Confirm – This will change the user to have a preference of receiving bills via email. The user will receive the Send End User URL Email Event (which needs to be setup within the submission type).

Cancel – The user's delivery method will remain mail.

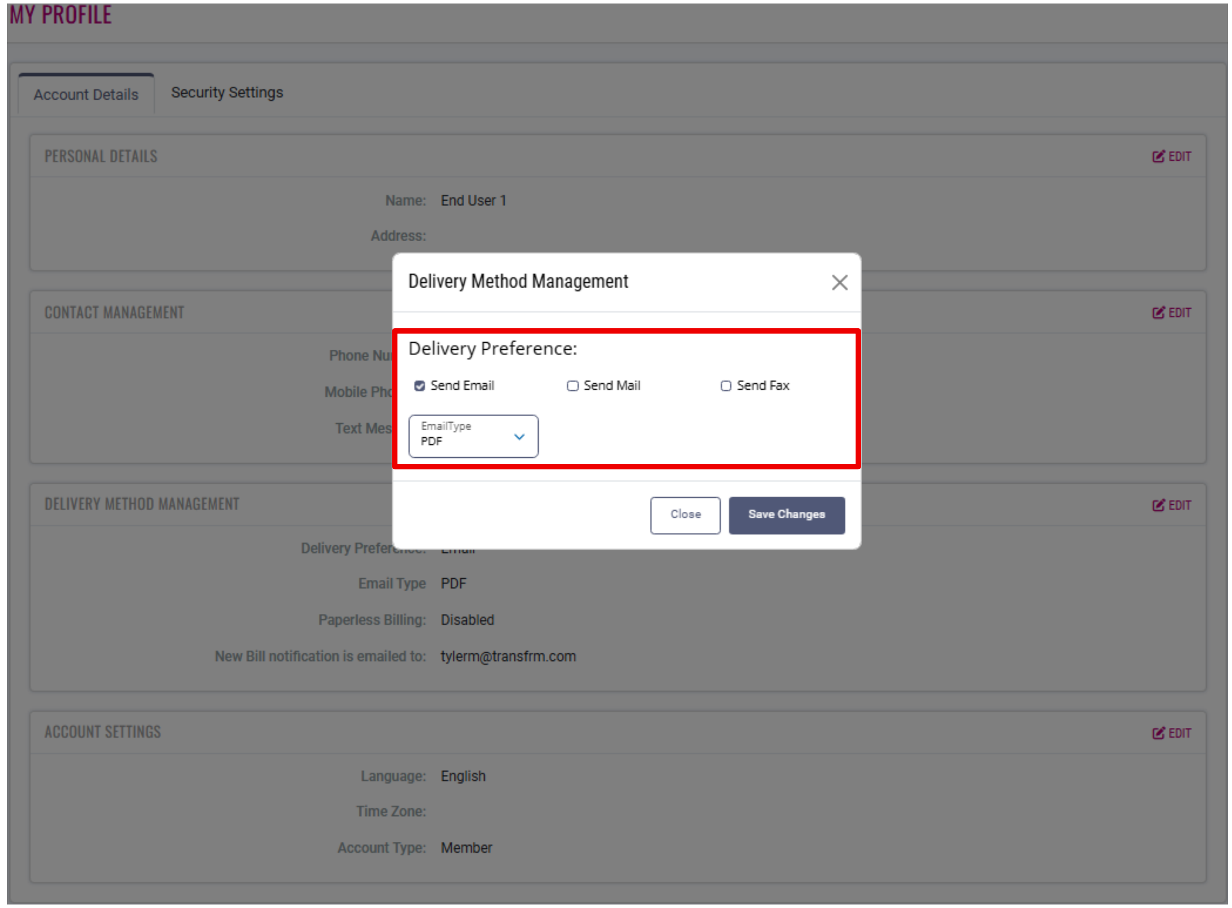
Ask Me Later – The user will have this popup box appear next time the user logs into the site.

Default Delivery Type for New Users – For a new user, this will be the Delivery Method selected for that user on their profile. If email is selected, it will apply the default email type as well.

Default Email Type for New Users – If Email is the delivery type, URL or PDF must be selected here. This preference will be saved on the new user's profile under select email type.

URL – An email with a URL link will be sent to the user to view their statement. See Send End User URL Email event for how to set up this email.

PDF – An email with an attached PDF of the user's statement will be sent to the user. Send End User PDF Email event for how to set up this email.



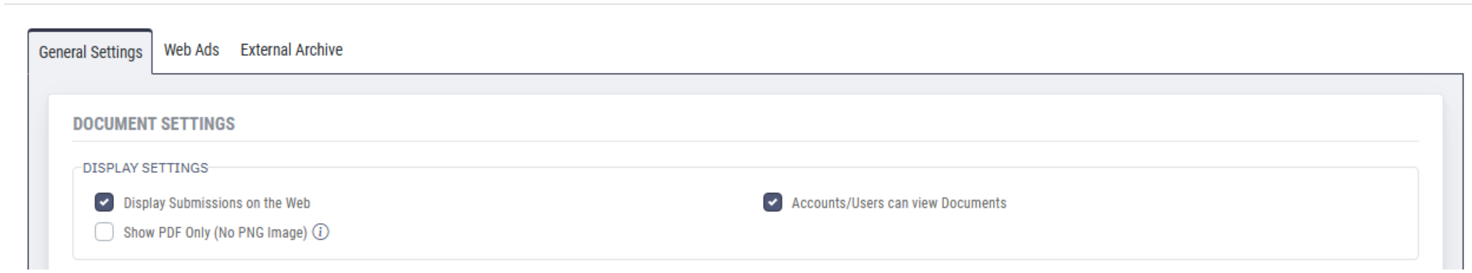
Tips:

All of these settings can be edited by the user within their profile maintenance at any time.

Display Documents on the Web

Documents are enabled to view on the web portal at a submission level. Within a submission type, click on the web tab.

Display Submissions on the Web – This must be checked for documents from this submission to be viewed by an admin or CSR user in the Web Proofing, Dashboard, or Search records.



Accounts/Users can view Documents – This allows an end user to view their document if they have access to documents with that account # under that submission type.

Show PDF Only (No PNG Image) – Turns off PNGs on the web for this submission type. Most documents generate a PNG of the document as their default way of viewing the documents (they still have a button/option to view it as a PDF as well). If this is checked the default for viewing the document becomes a PDF, nothing else. This only applies to Web Approval and viewing the document from the Dashboard, not the Search page, or as an end user. This setting will only apply to the Dashboard and Web Proofing pages for the admin user.

Tips:

Documents from submissions that have been deleted/cancelled manually or using uDelSub.exe will not be displayed on the web despite these being checked.

For archival purposes, do not delete/cancel submissions until those documents no longer need to be archived.

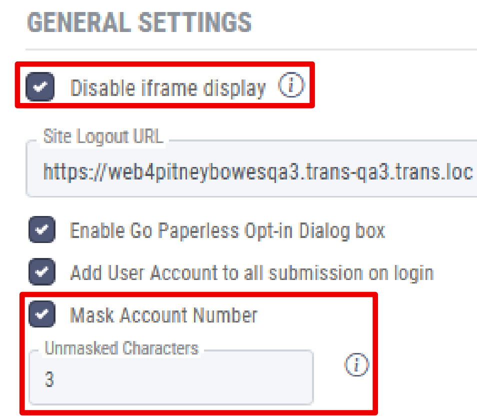
Document Exclusions

These are the behavior settings for exclusions.
For users that are receiving their documents by email/fax, if their document was marked as Omit or Exclude, then they will not receive an email/fax.
Do Not Display will not display documents marked as Omit or Exclude for Web Approval or the document list within the submission in the Web Dashboard.

Standard users will see their document on the User Main page regardless of these settings.

Disable iFrame

Disable IFrame Display – This removes the ability to view the Relay Unify site in an iFrame. This is found on the Site Management Tab when initializing their site.

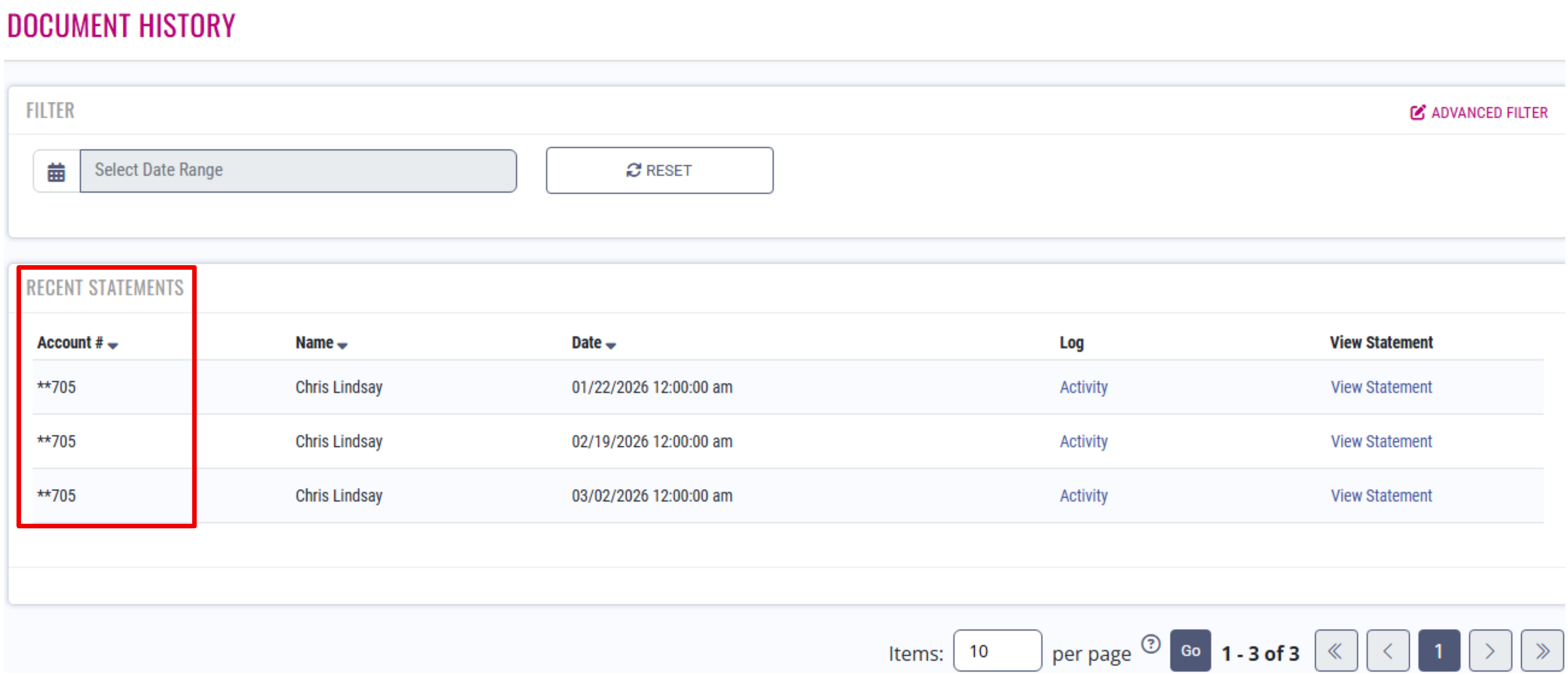


Mask Account Number

Mask Account Number – Check this to enable this feature. This is found under the End User Settings Tab.

Number of unmasked characters – This will replace each number of the Account Number with an * other than the number of characters entered here to keep unmasked.

This will only take effect for standard users; Admin users will still be able to see the account number unmasked.

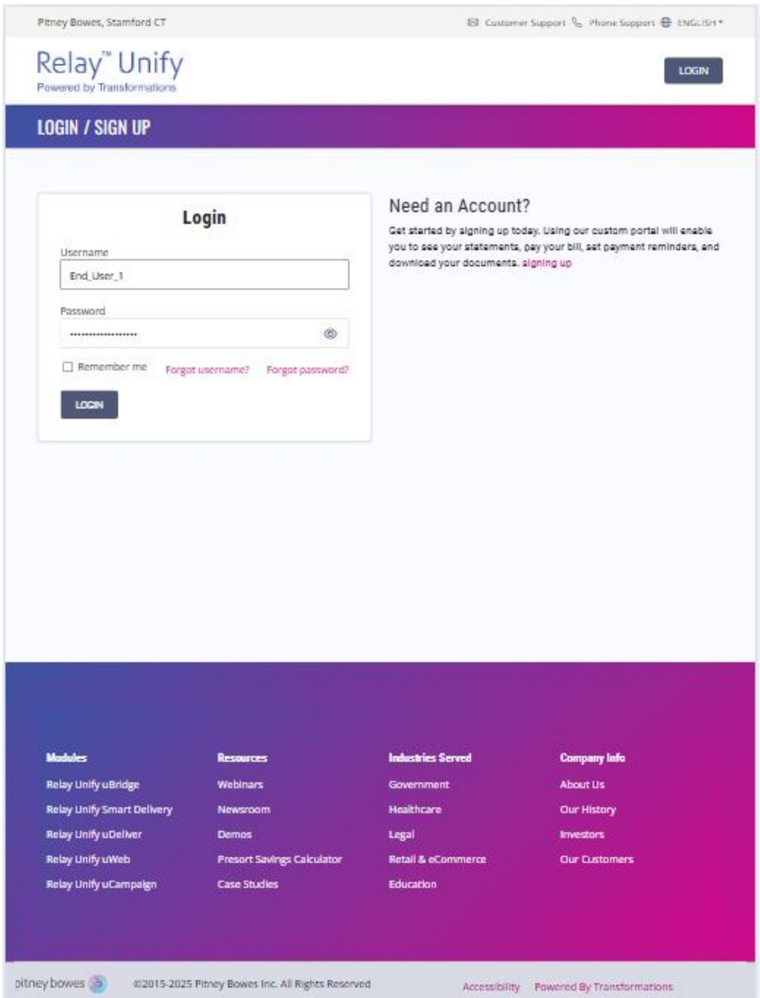


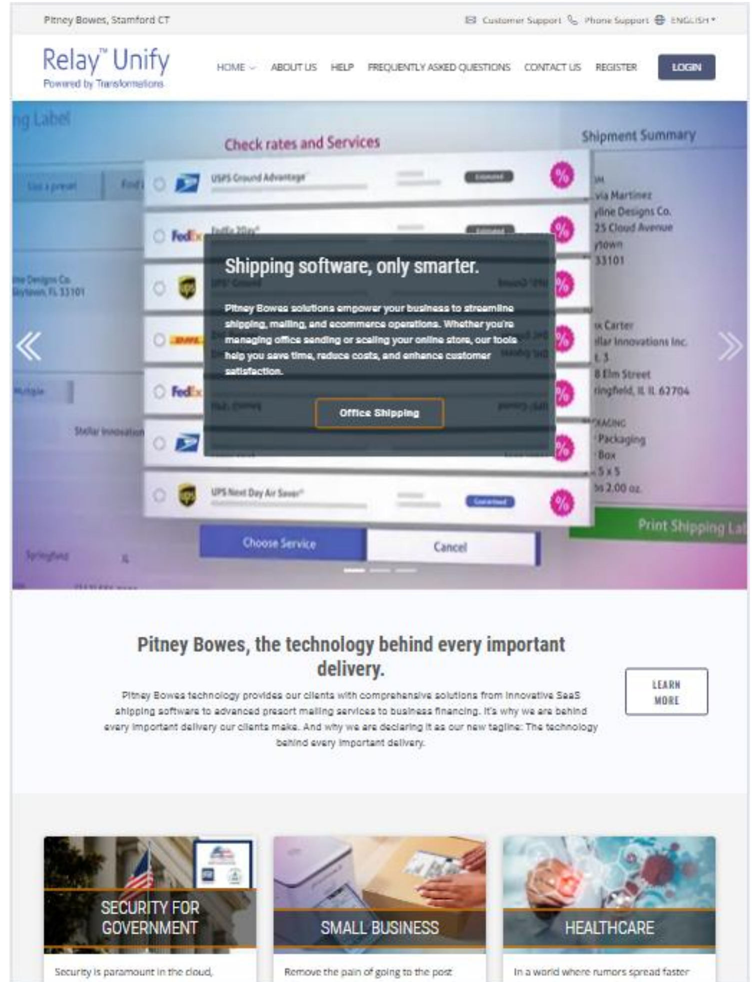
Responsive Mobile Pages

Web 4 is built Responsive Pages first, so all websites are capable of being used on mobile devices.

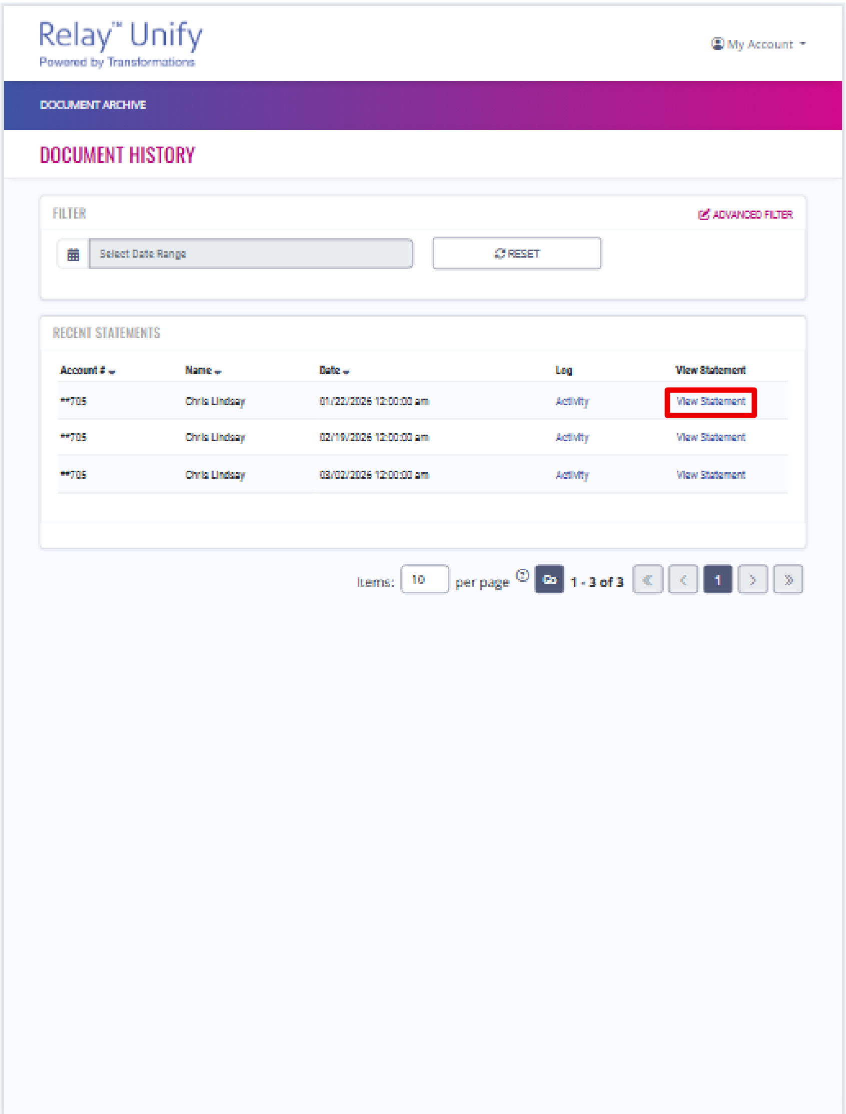
The home page, user main, Confirm page, and payment pages will all be responsive.

The user will enter the site using a responsive home page.

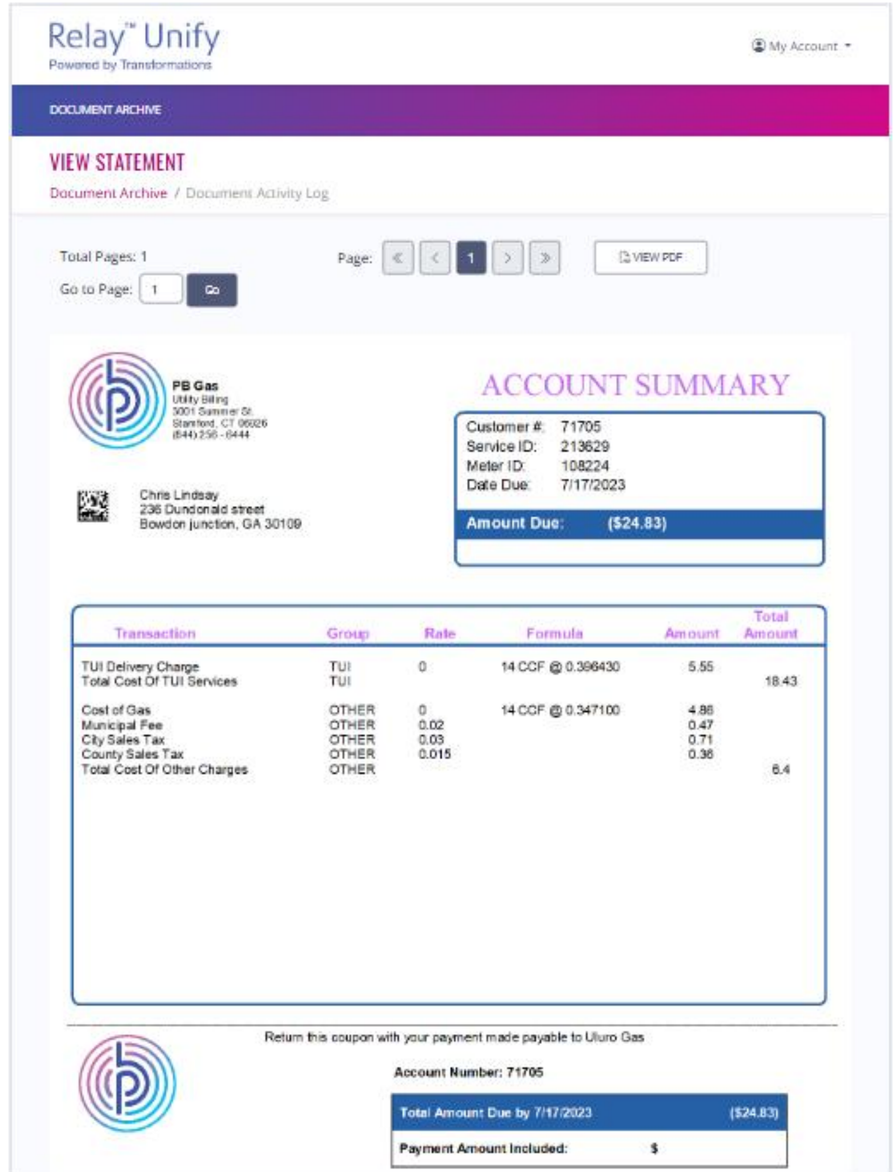




Once logged in, the user will see a list of documents. Click on the View Statement button to view the document as a PDF. The Document Date shown is from the field Sys_Doc_Date.

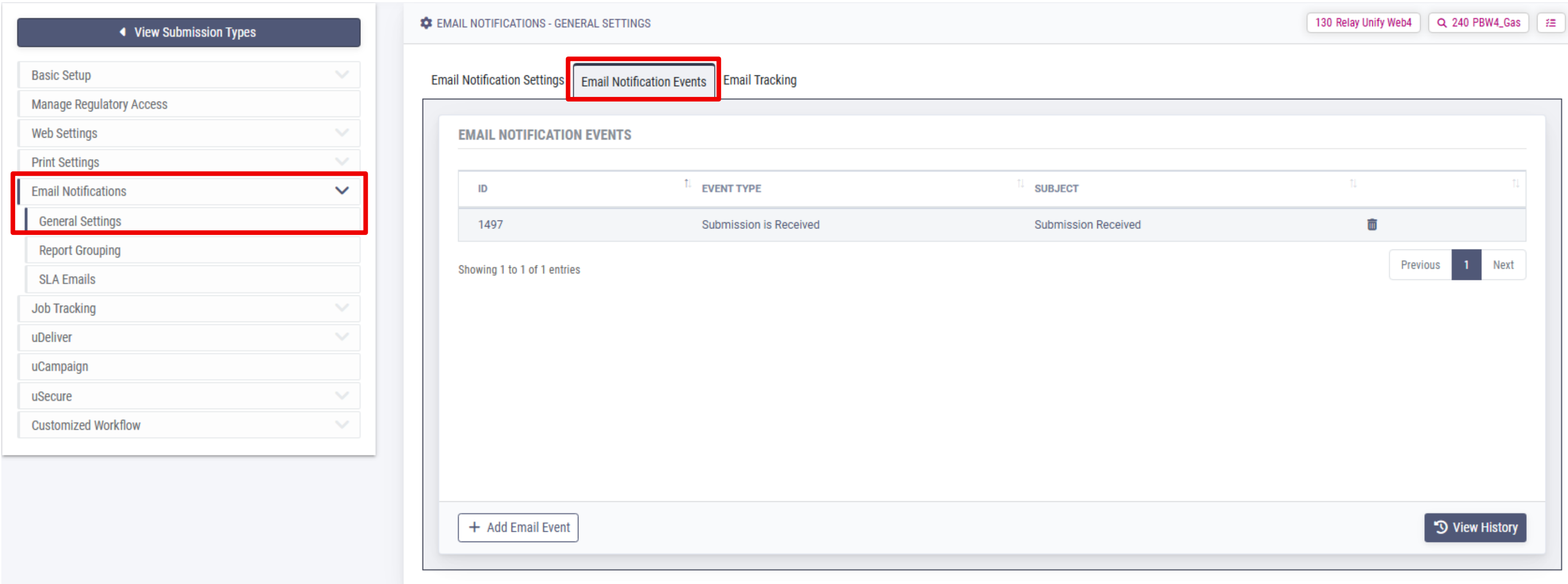


Example of the document being viewed:



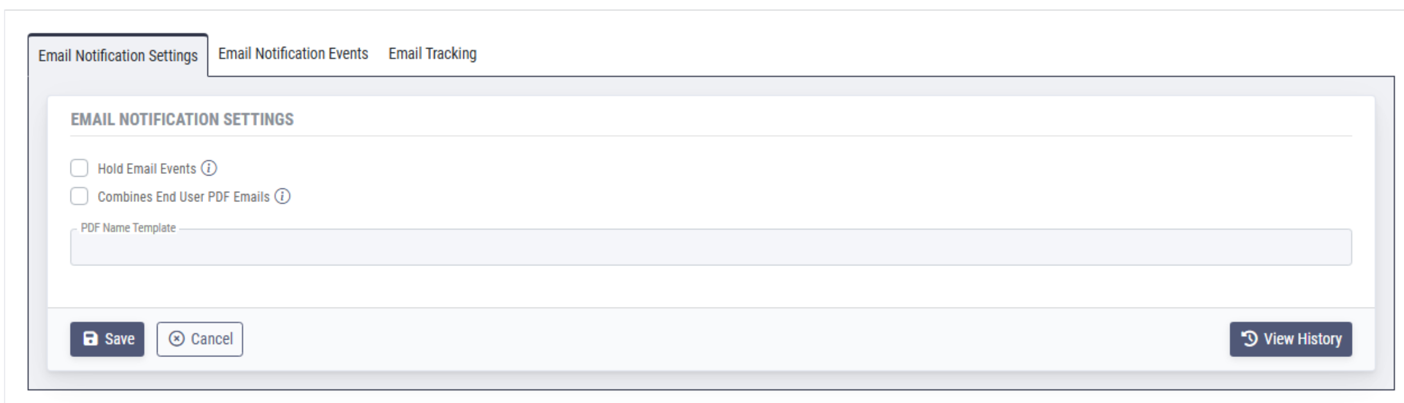
Send End User PDF/URL Emails

Both email events are set up and enabled at a submission level. Within any submission type, go to the Email Notifications Dropdown Tab > General Settings Tab > Email Notification Events Tab at the top.

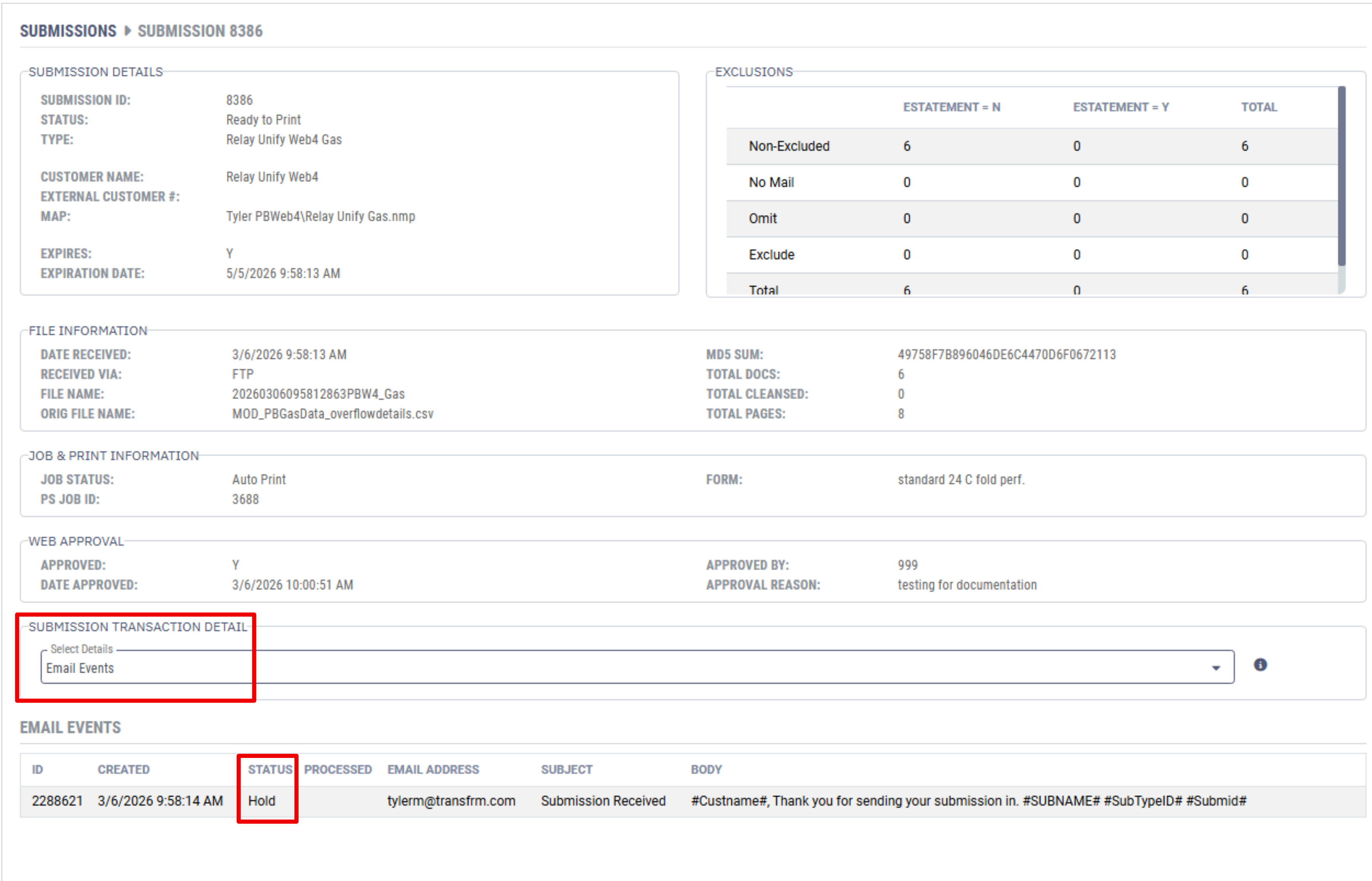


Click on + Add Email Event to setup the end user emails for e-statements.

The email events that have been set up for this submission will be displayed on the screen when you go to the Email Notification Events Tab.



Hold Email Events – If this is checked, the Email Event will be created, but no emails will be generated until the email event is Queued. Go to the Job Tracking Dropdown Tab > Submissions Tab within a submission type. Click on the submission to see more detailed information about that submission. You will see the email event under the Email Events Dropdown tab at the bottom. The email tab will have no information at the moment since the event is in Hold status currently.



Combine End User PDF Emails – If this is checked and there are multiple web users that have the same email address on their account, the PDFs will be combined into one PDF and one email. The combined PDF containing all of the statements will follow the naming structure of Combined_submIDx yymmddhhmmss.pdf. If this is unchecked, the PDF emails will be sent individually per document and the attached PDF will contain only one statement and follow the naming structure of _submID x docno.pdf

PDF Name Template – This can be used to adjust the name of the PDF. Anything can be entered here but _submID x docno.pdf will follow the text entered in this field. This field will only be used if the PDFs are *not* being combined. The naming structure for the combined PDFs will always be Combined_submIDx yymmddhhmmss.pdf.

Tips:

If the field Sys_EmailAddress has a value, it will override the email address(es) from the web profle. If there is no web user for that account but there is an email event set up for the End User PDF/URL email then Uluro will send both the URL and PDF end user emails to the email address from the data.

For the Send End User URL Email to contain a link, you will have to put the link in the body of the email.

To create a new email event, click the + Add Email Event button.

Event – Select the type of email event. For e-statements, select Send End User PDF Email or Send End User URL Email.

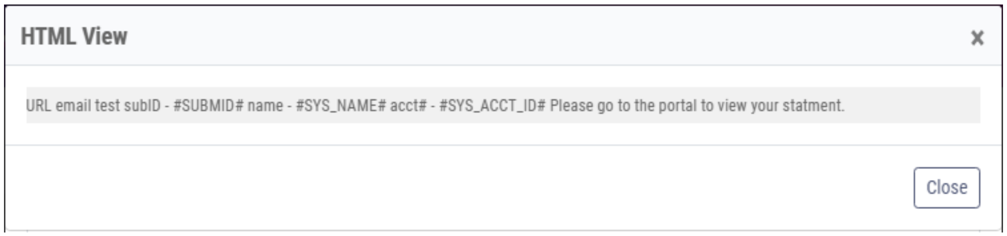
To Email Addresses – The Email Address is pulled from the web users profile, so this is grayed out. These two types of email events will be generated and triggered from the profile settings of web users. When a submission is run, the web users with delivery type of email will receive one of these two emails, if they have been set up. Those with email as a delivery type and PDF as the method will receive Send End User PDF Emails. Those with email as a delivery type and URL as the method will receive Send End User URL Emails.

Subject – Enter the text that will be displayed as the subject line of the email.

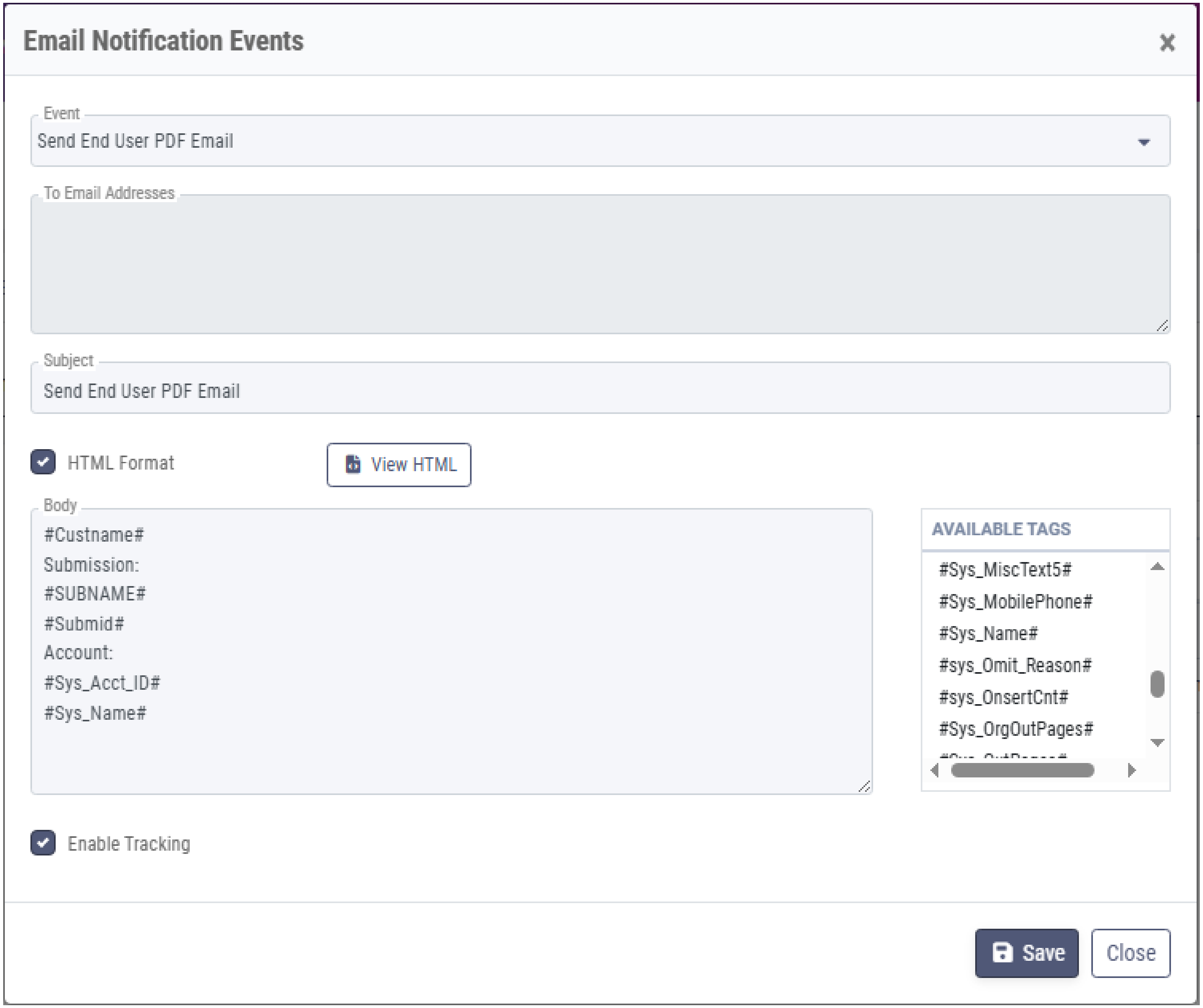
Body – Enter the body of the email. This can be HTML if desired. Simply check the **HTML Format** box.

Click the **View HTML** button to preview the email.

Tags – These can be added to the subject line, or the body of the email. Simply click on any tag in the list to add it to the text of the subject or body of the email.



Sample Setup:



Combine Emails

Enable – If this is checked, combined URL emails are enabled. If this is checked, and Combine body is unchecked, the emails will be combined into one email per unique group of email address(es).

Combine Body – If this is checked, Enable must also be checked for this to take effect. This setting combines the body of all the emails that would be sent to that unique group of email address(es) into one body displaying each of the bodies.

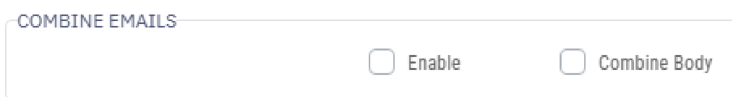
Tips:

The emails are sent per group of unique email addresses. If multiple users have the same primary email address on their profile for example, but a different email listed under additional emails, those users will not receive combined URL/PDF emails.

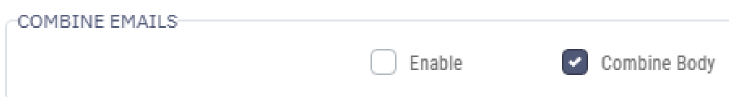
If two users have the same primary and/or additional emails then they will receive combined emails per unique grouping.

In the examples all 5 users have tylerm@transfrm.com as the primary email. One of those users (Clarence) has a different email listed as an additional email on the account.

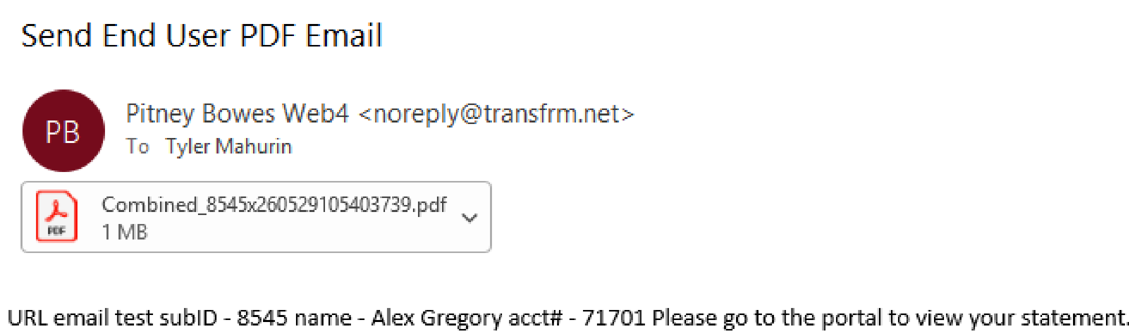
Setting



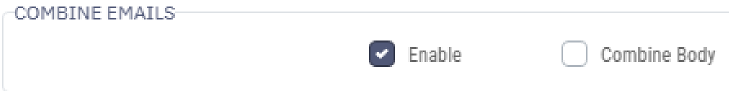
or



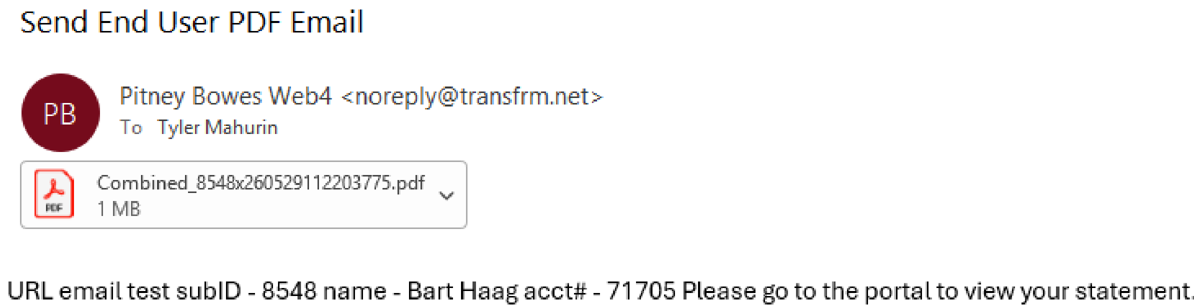
Result – Emails sent to the (5) users individually per email address. Here is a sample of one of the emails:



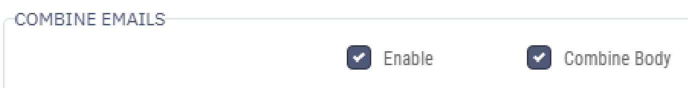
Setting



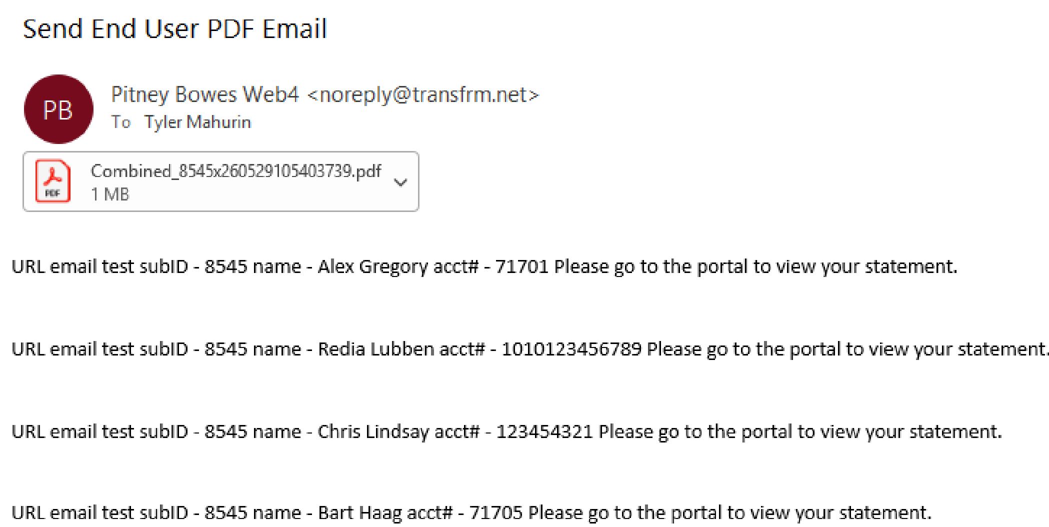
Result – One email is sent to each group of email addresses. For example, 4 users had tylerm@transfrm.com as the primary email and only one email was sent. The email will not list the body that would go to each user. It uses one body instead of showing all of them.



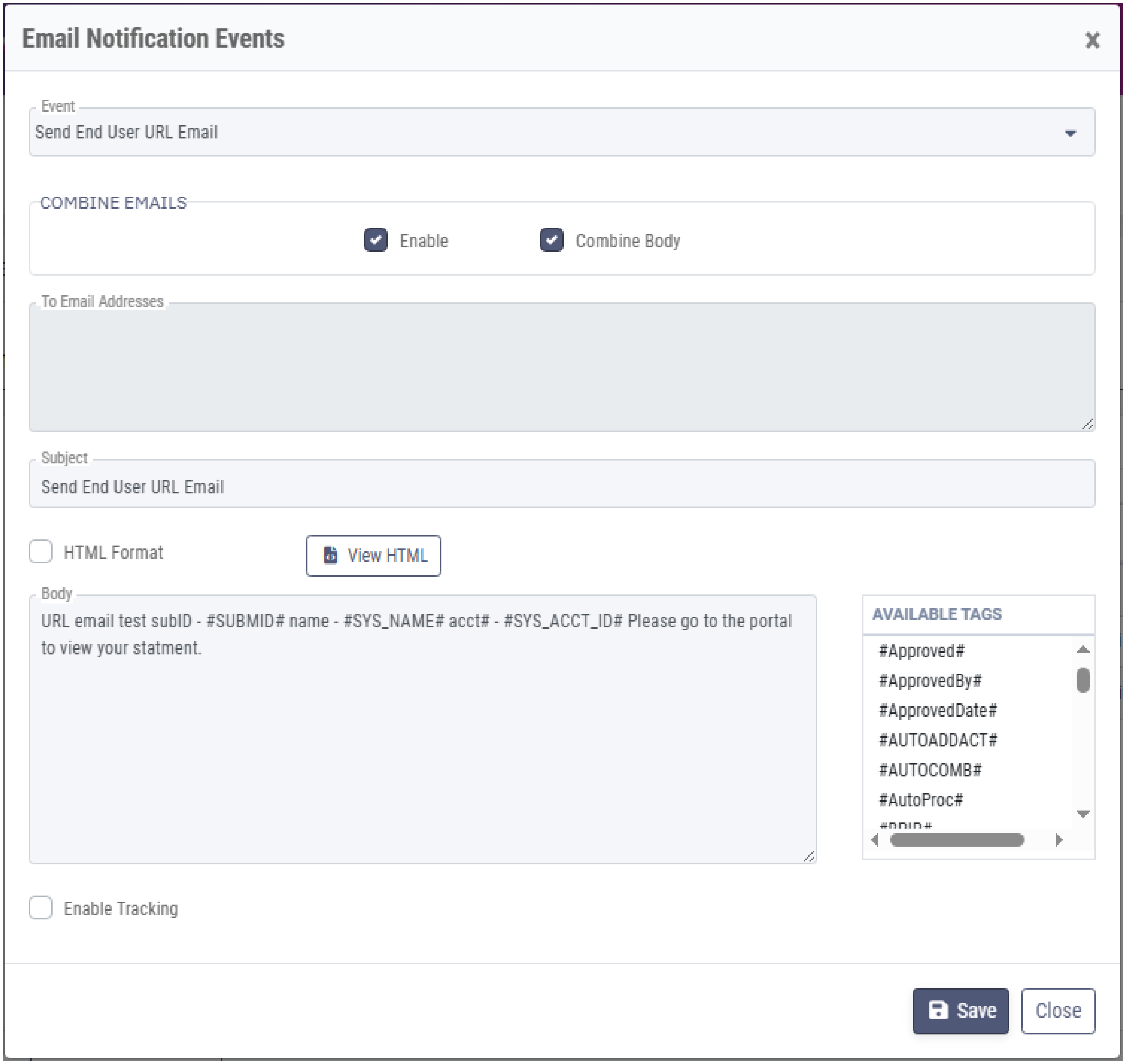
Setting



Result – One email is sent to each group of email addresses. For example, 4 users had tylerm@transfrm.com as the primary email and only one email was sent. The email will list EVERY email body that would go to each user.



Sample Setup:



Submission Email Report

This report will be created if a submission has Combine Emails enabled, and the combine has been run. You can find the report with the other reports in the Submit\RPT directory. It will be named RPT00000000SubmID.seml.pdf.

Sample:

Submission Email Report **3/19/2026 2:53:20 PM**

Original Submission File: PBGasData_overflowdetails.csv **Process Date:**

Submission ID: 8410

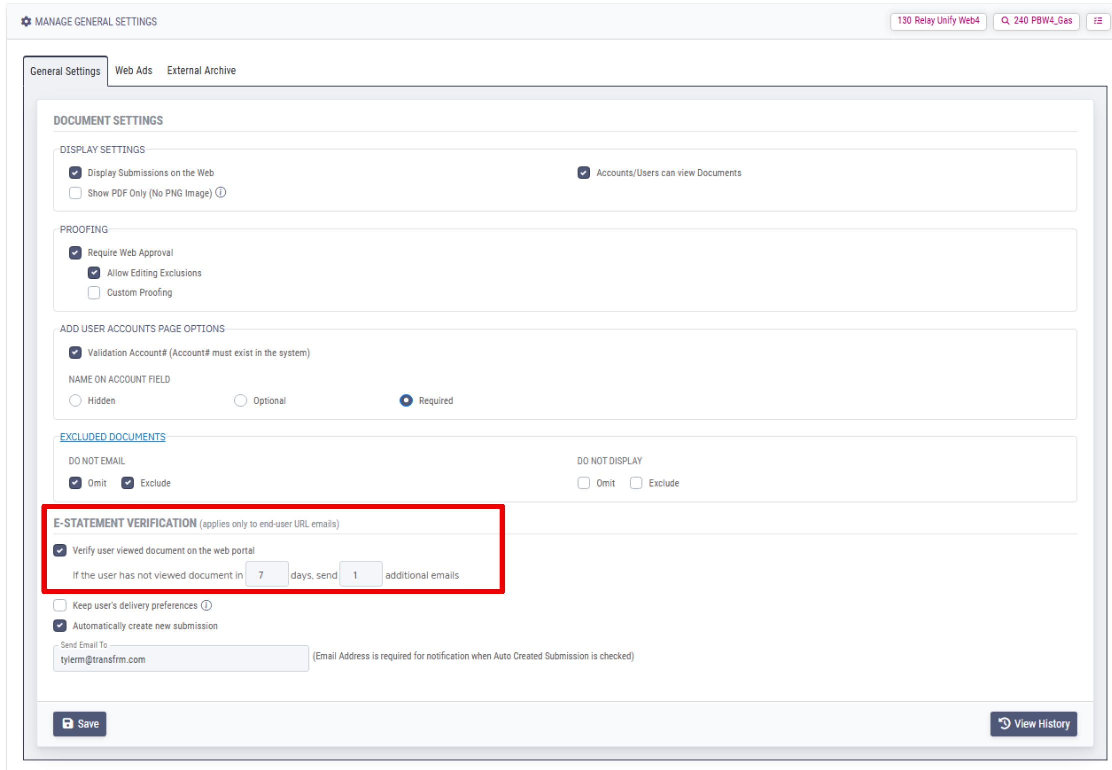
Client: Relay Unify Web4 **Submitter ID:** PBW4_Gas Relay Unify Web4 Gas

Acct ID	Acct Name	Email Address	Combined
71698	Ryan Semanchik	tylerm@transfrm.com	1
123454321	Tyler Mahurin	tylerm@transfrm.com	
269275	Scott Tripp	tylerm@transfrm.com	

Total Emails - 3 **Total Combined -** 1

eStatement Verify

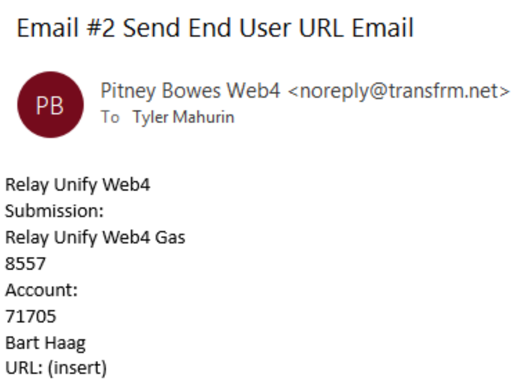
This verifies if a user has logged into the web and viewed their document. This is set up within a submission type, under the web & payment settings dropdown tab then the document settings tab. This only applies to web users that have selected Email and URL as the delivery method in their web profile. Those users will initially receive a Send End User URL Email event which must be set up within the submission type.



Verify user viewed document on the web portal – Check this to enable the functionality to verify if a user has viewed their document.

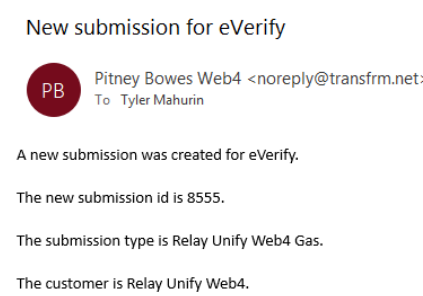
If the user has not viewed document in X days – This is the number of days the user is given to view the document before an additional email is sent.

send X additional emails – This is the number of emails to send after the initial email has been sent prior to the document being mailed. These will send on the same number of days for verification interval. Additional emails will have a number indicating a previous email has been sent. This example is the second email (first additional email).



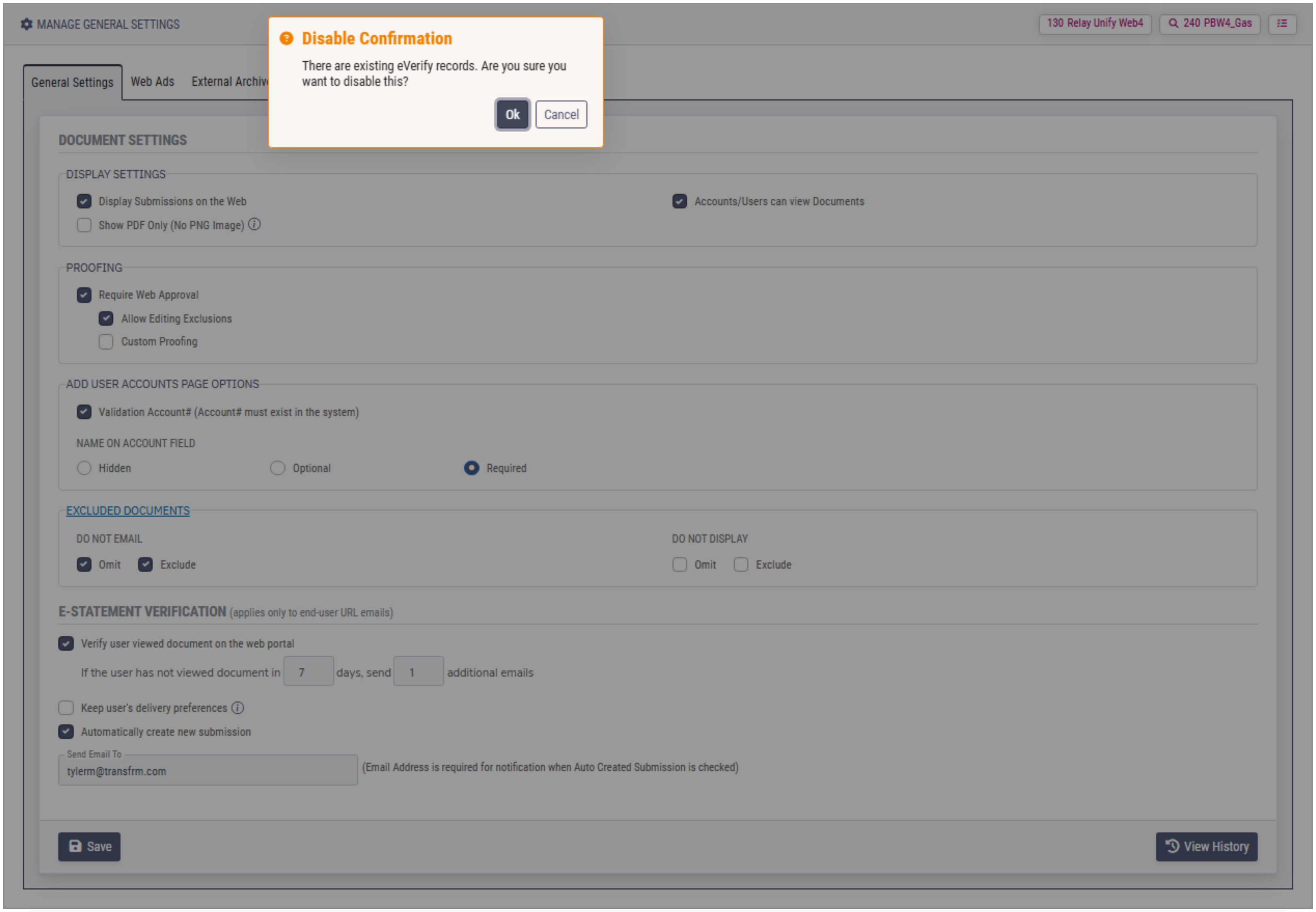
Keep user's delivery preferences – If a user has not viewed their document on the web even after the additional emails are sent, then by default that user will be changed to Mail only unless this is checked. Email delivery will be unchecked.

Automatically create New Submission – If this is checked, a new submission for those who have not viewed their document on the web will be created. One submission per document will be created. The submission will stop in Job Select status so that it can be put on a job with other submissions or processed to print as a single document.



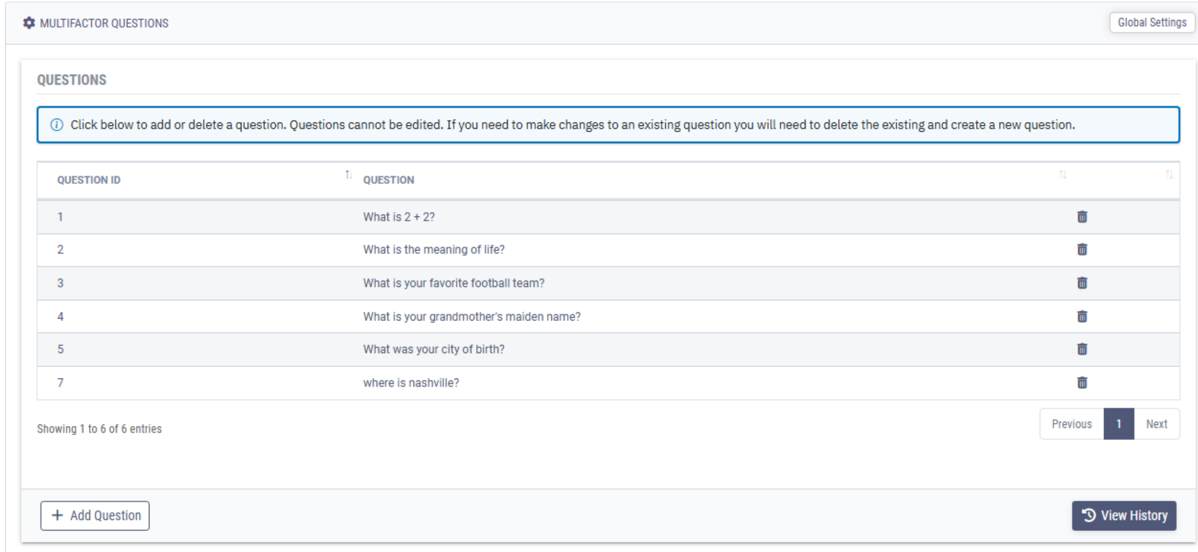
Send Email To – An email will be sent to this email address if a submission is automatically created. If the automatically create new submission setting above is checked, an email must be entered.

If there are documents that have not been viewed on the web and the web user is still receiving additional emails, then users editing the submission type will be prompted when trying to disable e-statement verify. If Yes is selected, e-statement verify will be turned off and the web users will not receive additional emails. If No is selected, e-statement verify will not be disabled on the submission type.



Multifactor Authentication

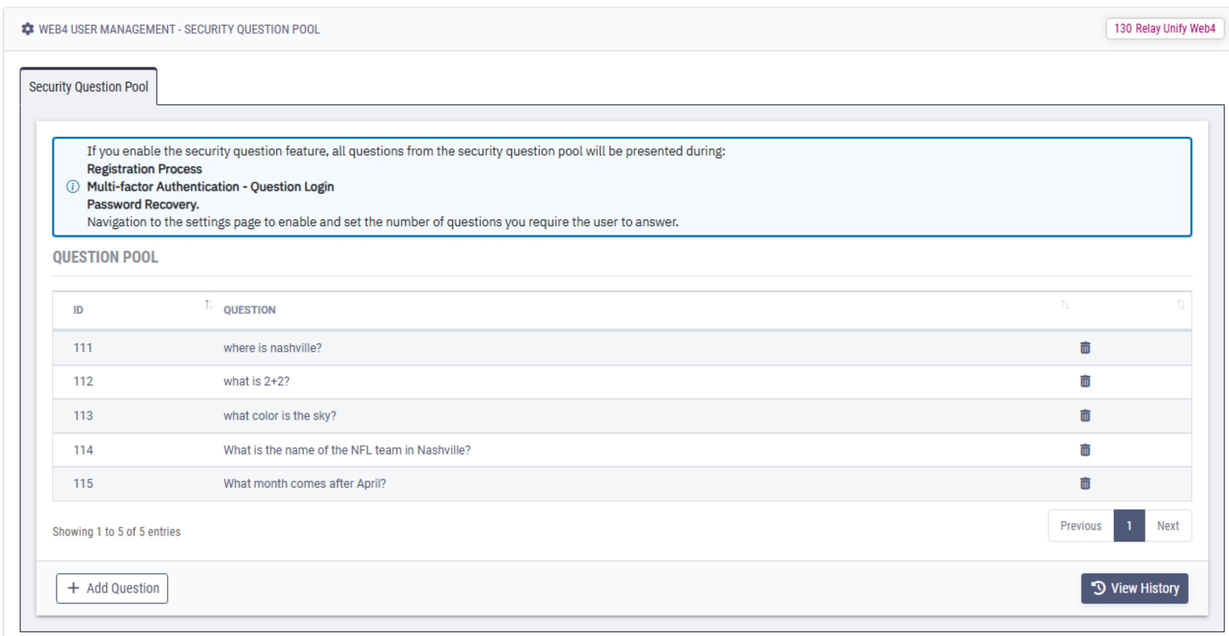
The questions must be set up globally first. This is done under the Global Settings > Web Settings Dropdown > Multifactor Questions Tab.



Create as many questions as you would like. This is the question bank that will be available to choose from when enabling Multifactor authentication for each site.

Click + Add Question and enter the question.

Within the Web Setup for a site, click the Web 4 User Management Dropdown > Security Question Pool Tab. The window will display the question bank set up globally. Selecting the questions for that site is done in the Multifactor Login Tab. Users will have to answer all of the questions enabled with a **Status** of Active (A) upon login.



Multifactor is enabled with Web Setup > Web 4 User Management Dropdown > Multifactor Login Tab.

Enable Security Question Login – Check this box to enable Security Questions for Multifactor Login.

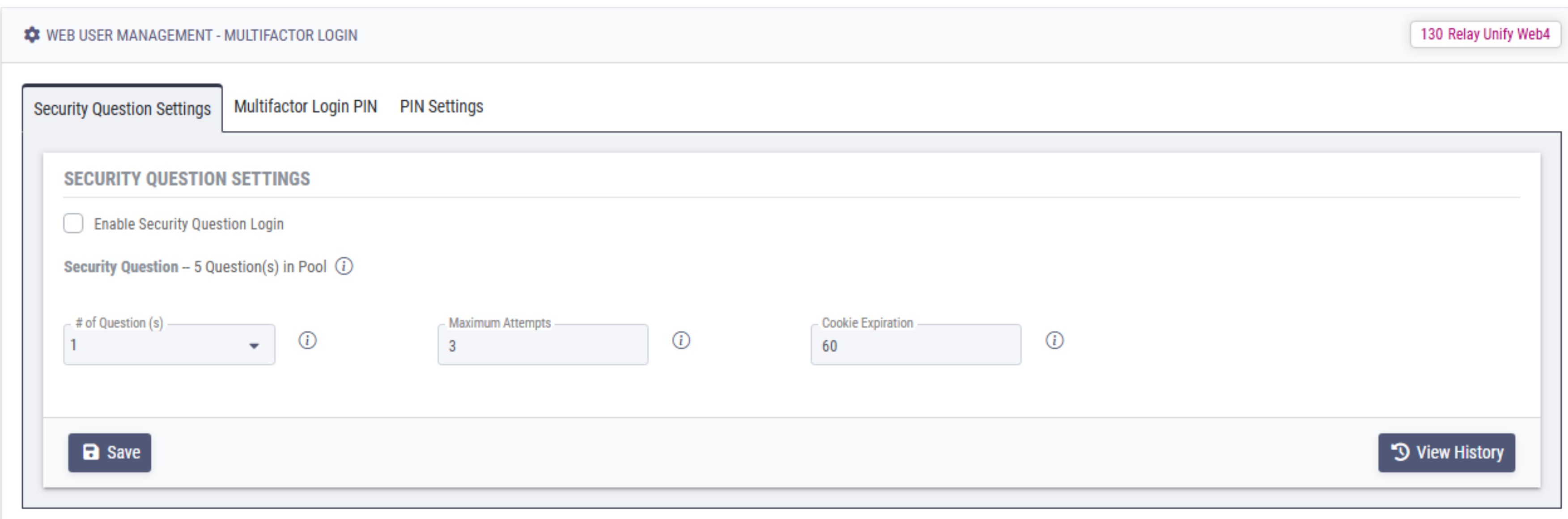
# of Question(s) – Depending on the number of questions in your Security Question Pool, this must be 1 or greater.

The user will be asked all questions that are Active for this site under the Security Questions button upon initial login or the number entered here. You can only select a number as high as the maximum number of Security Questions in the pool. If there are 10 questions in the customer list and the Min is 3 questions, then the user will have to answer only 3 of the questions to leave the question page.

The users will only be asked one of those questions when authenticating themselves.

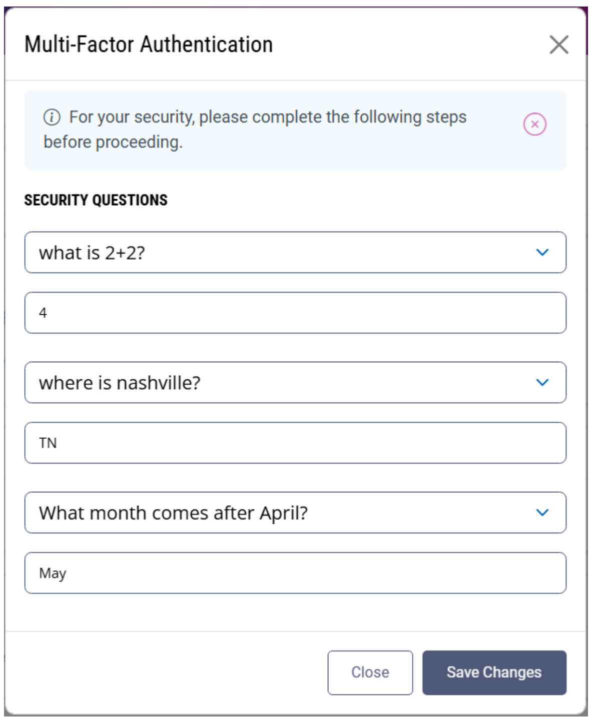
Maximum Attempts – When the cookie has expired and the user is required to authenticate themselves by answering the questions, the user is given this number of attempts. After the 3rd attempt (number entered) the user will be redirected back to the Main login page. The user can then login and try to answer the questions again.

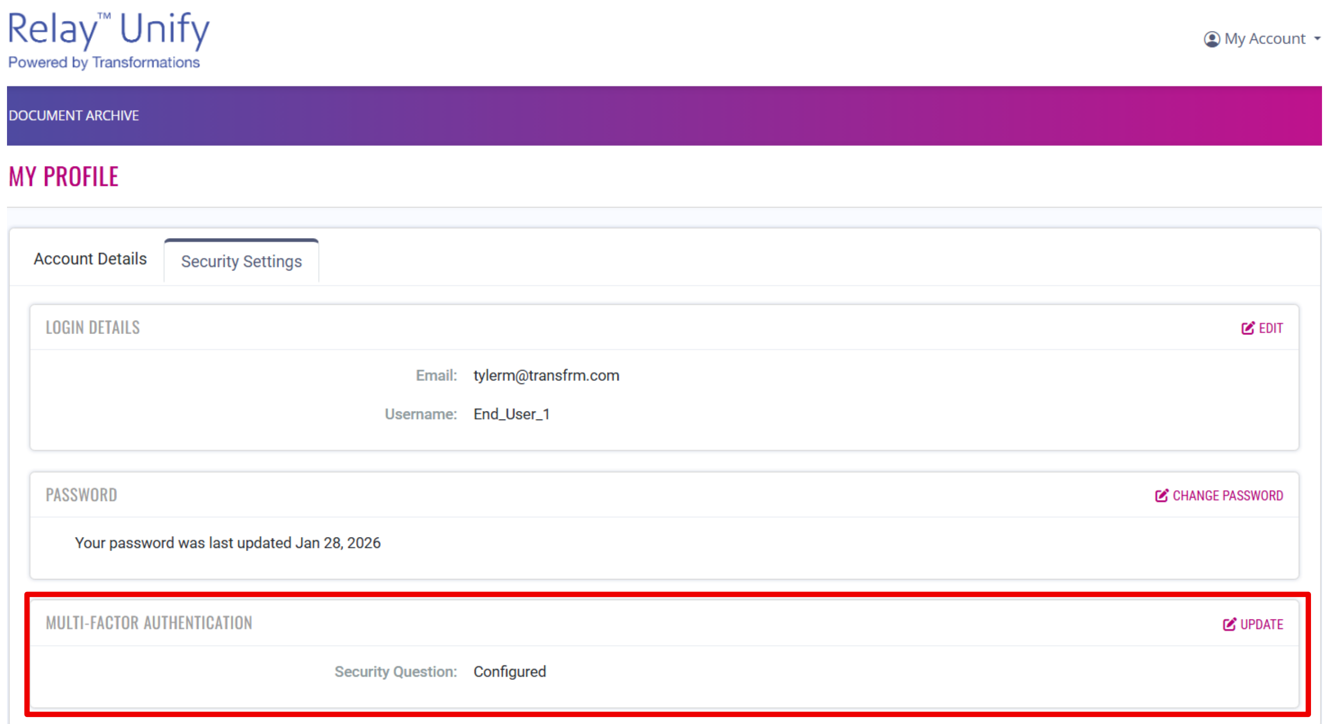
Cookie Expiration – The number of days that the browser will remember that the user has authenticated themselves. After the number of days entered here have passed, the user will have to answer a question upon login to authenticate themselves. If the user is using a new browser before the days have passed, they will need to authenticate themselves for that browser.



End users can edit the answers to their questions under their Profile by clicking on Update under the Multi Factor Authentication section.

Edit the answers then click Save Changes.





Disclaimer

The disclaimer is set up and enabled under the Web 4 User Management Dropdown > End User Settings Tab > Disclaimer Settings Tab.

Enable Disclaimer – Check this to require users to accept the disclaimer.

Edit the disclaimer and click the **</> View HTML** button to view how it will be displayed on the web.

If the date for **Active Date** is changed, all non-admin users for the site will have the disclaimer field set to 'X' requiring them to accept the disclaimer on the next login.

You can also build a customized disclaimer and use that instead. If that is the case, check both the **Enable Disclaimer** and the **Enabled** box for the custom disclaimer.

Custom Link – This is the URL of the website used to handle the custom disclaimer.

Custom Link Text – This is the text that will hold the URL linking to the custom disclaimer website. This is what will be shown to the user.

Custom Disclaimer Denied Link – This is the URL that the user will be redirected to when rejecting the custom disclaimer. This is an optional field. The user will be redirected to default.aspx if blank.

Note: Any time a change is made to these settings, users will be prompted to accept the disclaimer on the next login because something about the disclaimer has changed.

Custom Disclaimer Process

Confirm.aspx handles both the query and response to the custom disclaimer page.

Query from Confirm.aspx to the Custom Disclaimer Page

This page generates a link to the Custom Disclaimer Webpage. Which when clicked generates a query string with a disclaimer token and return url.

Ex: http://www.CustomPage.com/disclaimer.aspx?DisclaimerToken=<value>&ReturnURL=<value>

The DisclaimerToken generated by Relay Unify is used to identify the user session on return.

The ReturnURL is a link back to confirm.aspx of the Relay Unify Site.

Query back from the Custom Disclaimer Page to Confirm.aspx

A Custom disclaimer website will return to ReturnURL with a query string containing the token and Boolean result of the disclaimer.

Ex: http://Relay UnifyWeb.com/confirm.aspx?DisclaimerToken=<value>&Accept=<Boolean>

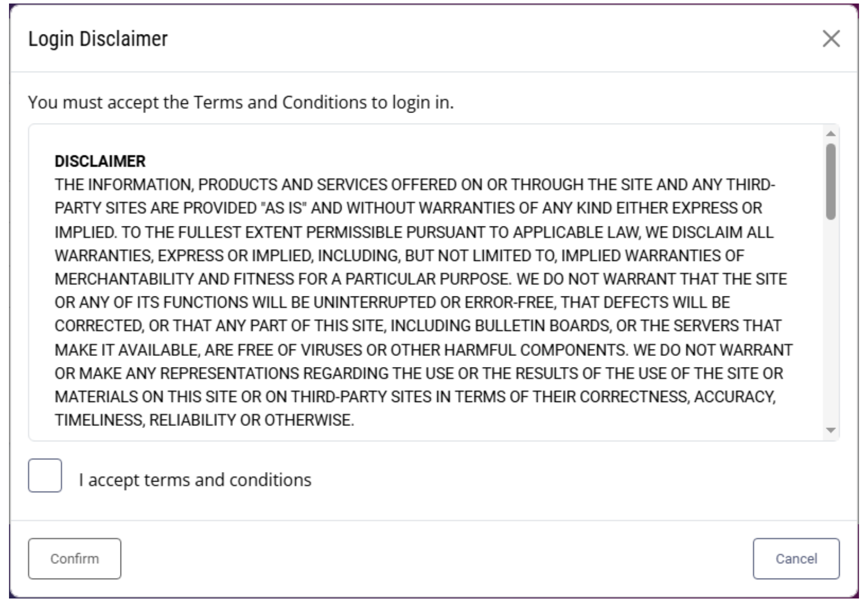
DisclaimerToken is used to identify the user session.

Accept is a Boolean value and is not case sensitive.

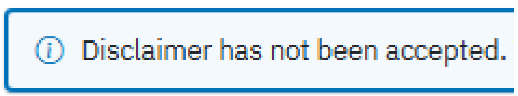
An Accept value of “false” will redirect users to the Custom Disclaimer Denied Link or Default.aspx if that value is blank.

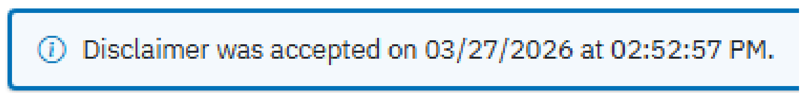
For the default disclaimer:

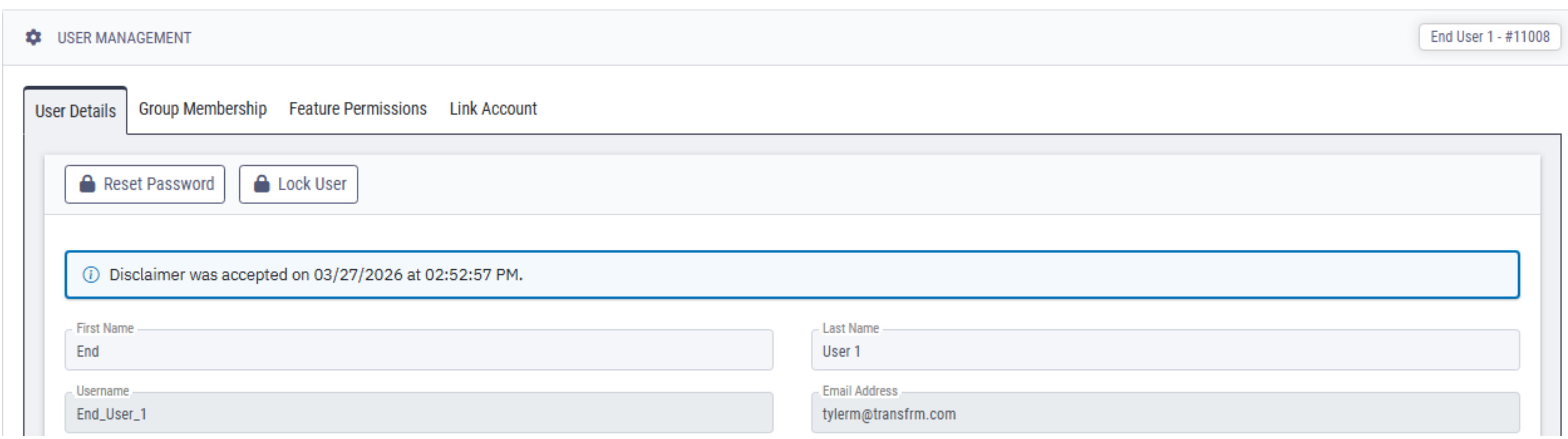
Users will only be asked to accept the disclaimer upon logging into the site:



When the disclaimer is accepted, the user's profile will identify when it was accepted. This can also be verified under the Manage Users tab in the Web Designer.



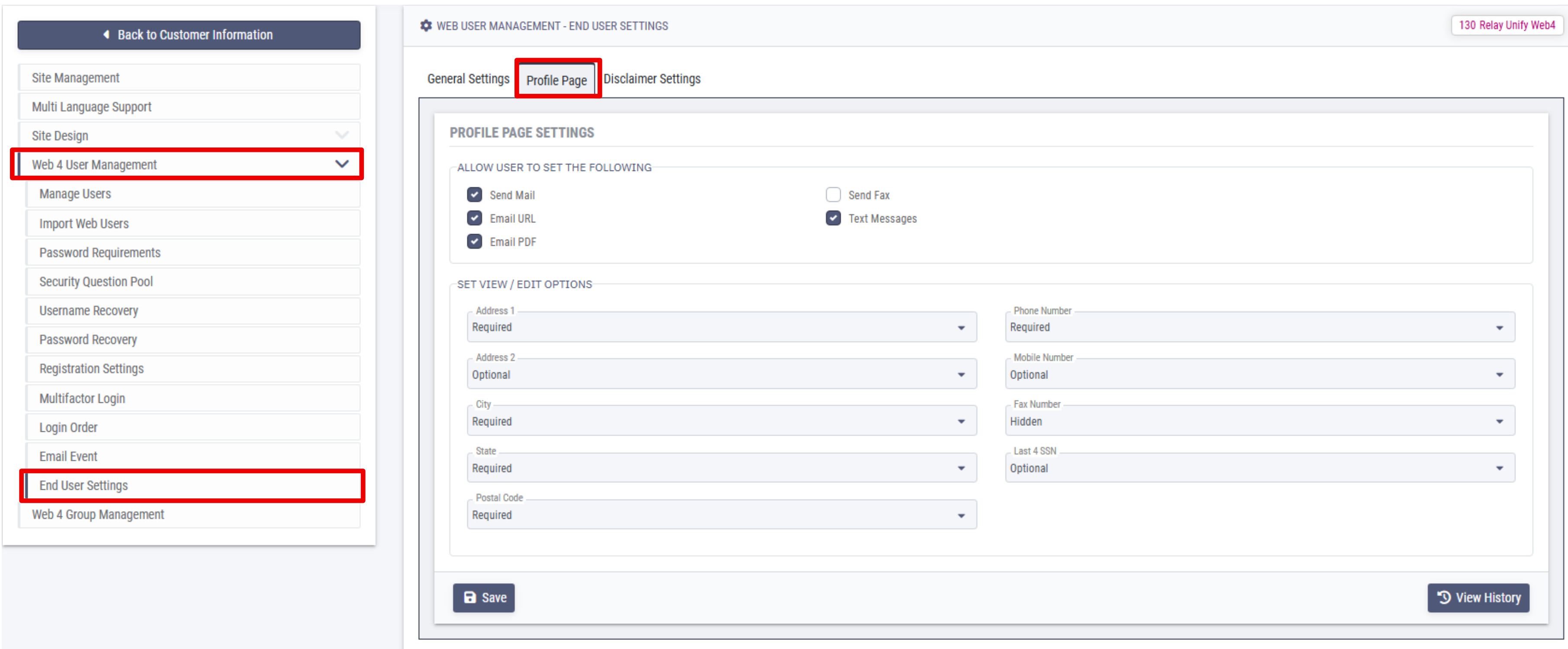




Profile Page Settings

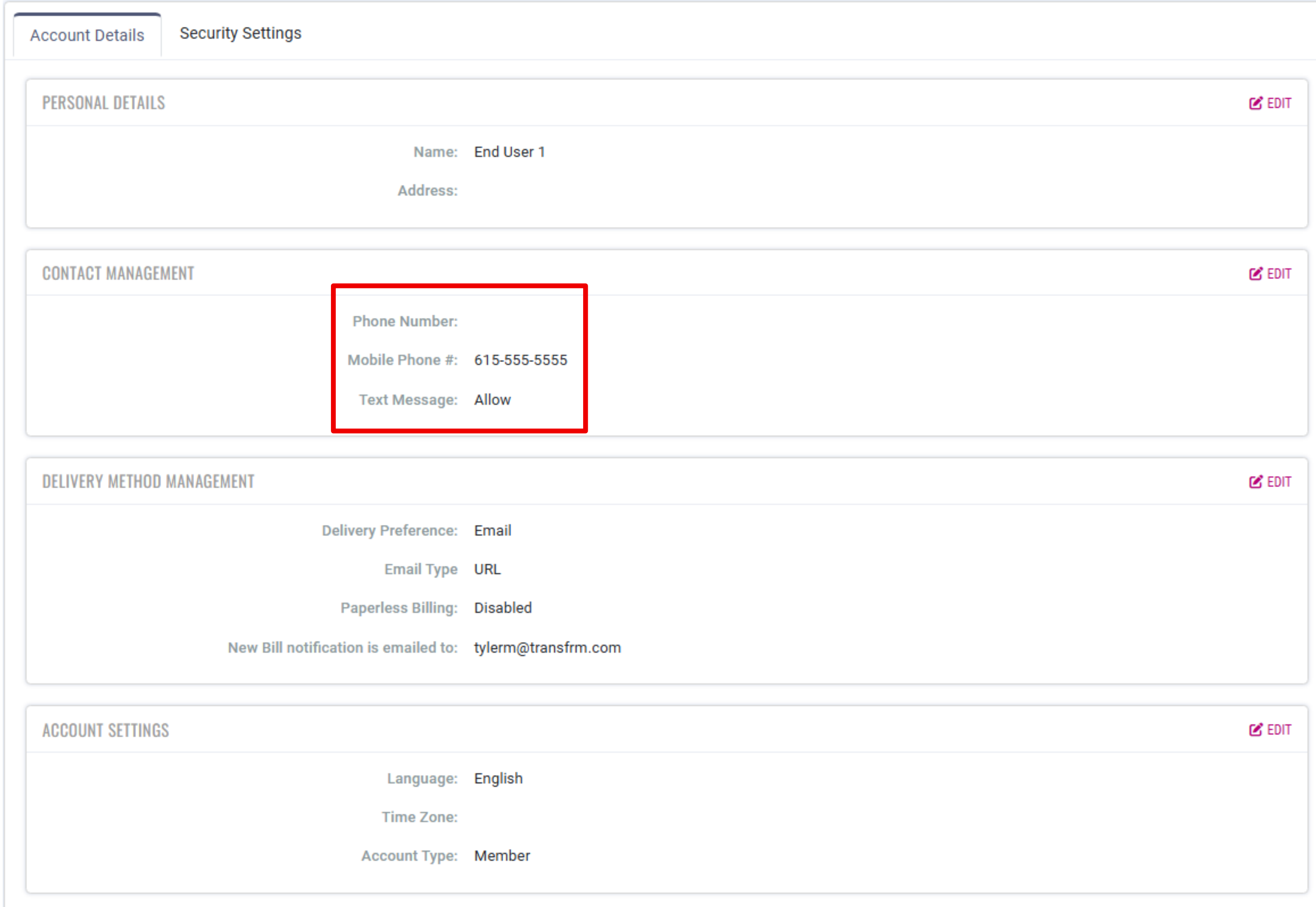
The Profile page is edited under the Web 4 User Management Dropdown > End User Settings > Profile Page Tab.

These settings determine what a standard user can view/edit within their profile. It also determines what fields are required for a user to enter on their profile.

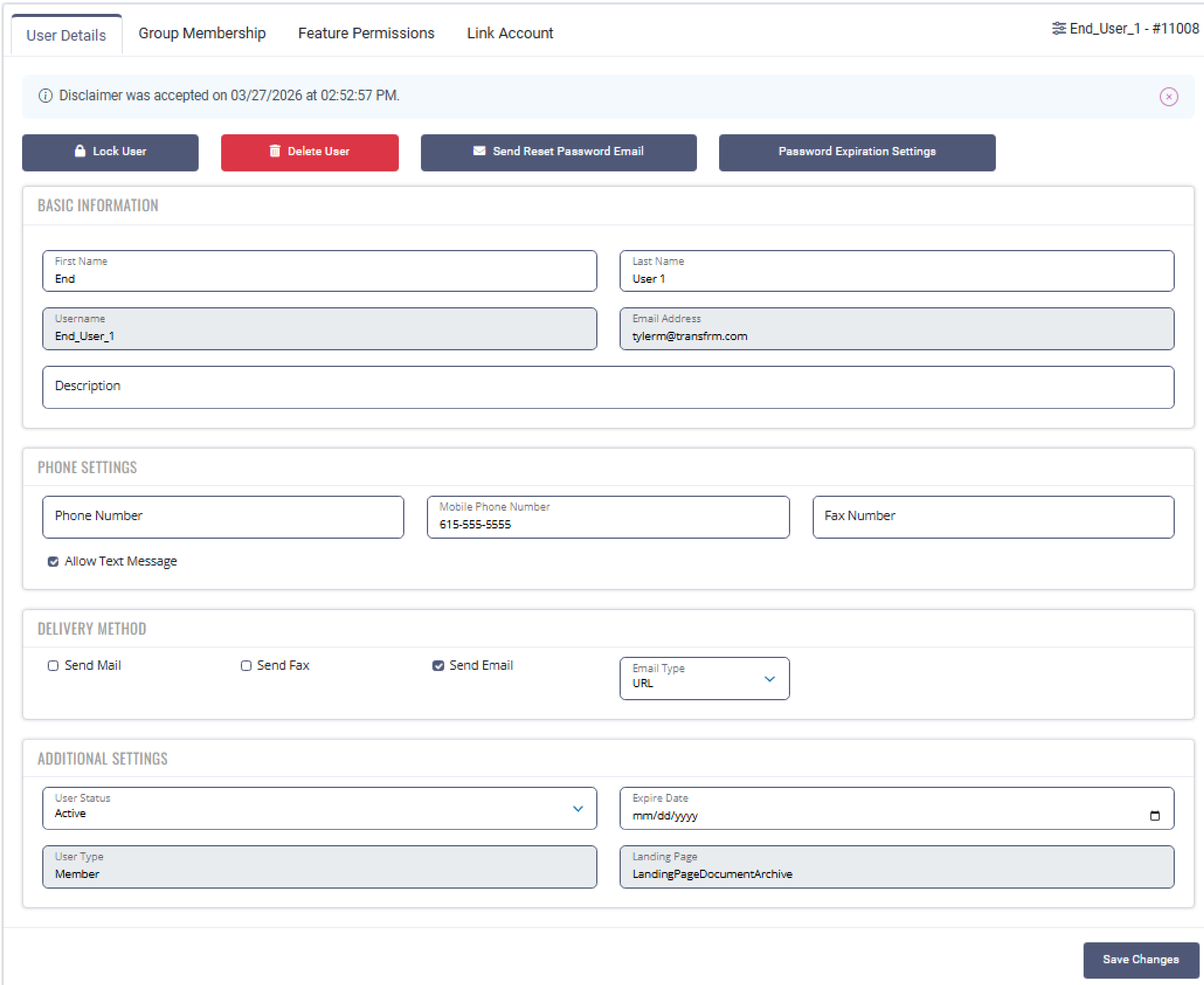


If only one email type is selected as an option on the web profile, then it will automatically be filled in when the web user selects email as the delivery method on their web profile.

The End User's view of their profile is they can view and edit anything that is required or optional.:



The admin user's view of a user's profile if nothing is hidden:



Admin/CSR User Experience

Upload Files (Web FTP)

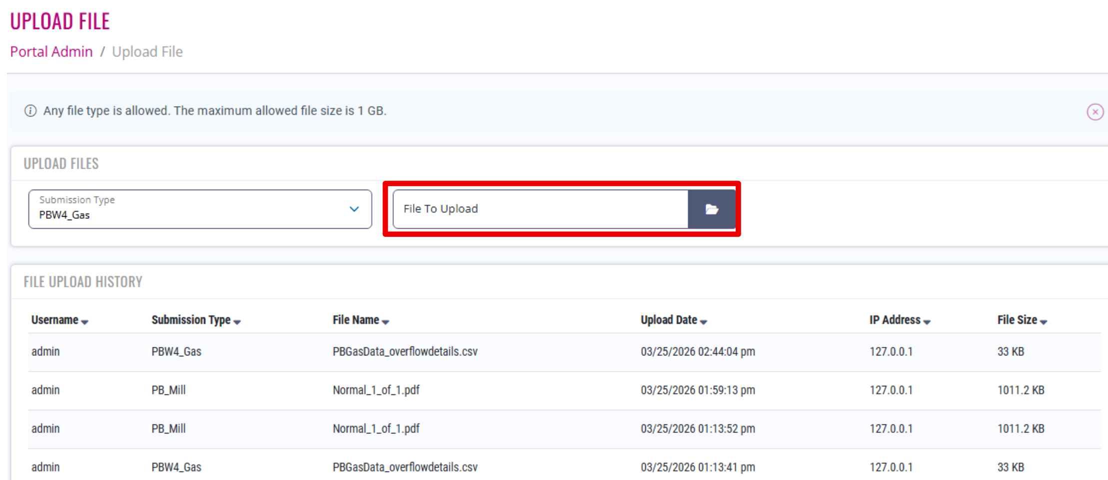
For an admin user to be able to upload a data file for a Submission type, the Web directory for that submission type must be filled in and enabled by checking the box under the General Information Tab under Basic Setup in the submission type.

Each submission type must have a unique Web directory location that begins with \\server\Submit\Web\.

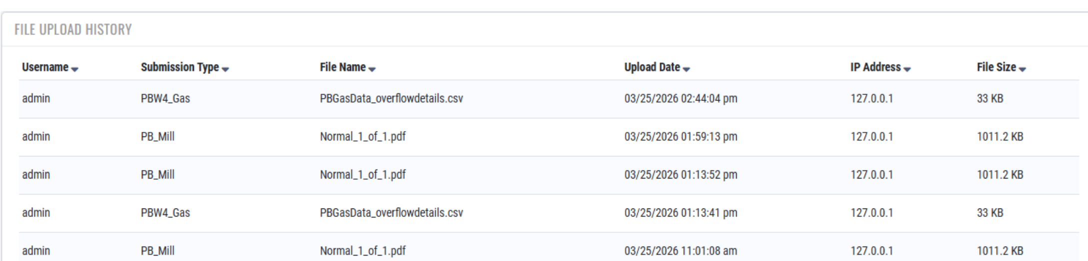
Once the file has been uploaded, it will go to this web directory to be picked up by Relay Unify, thus creating a Submission.

The user will select from all of the submission types with a Web directory for that client/site.

Click the File Folder to search for the data file. The file being uploaded has a max size of 1 GB (1024 MB). Once a file has been choosen, click Upload.



Username	Submission Type	File Name	Upload Date	IP Address	File Size
admin	PBW4_Gas	PBGasData_overflowdetails.csv	03/25/2026 02:44:04 pm	127.0.0.1	33 KB
admin	PB_Mill	Normal_1_of_1.pdf	03/25/2026 01:59:13 pm	127.0.0.1	1011.2 KB
admin	PB_Mill	Normal_1_of_1.pdf	03/25/2026 01:13:52 pm	127.0.0.1	1011.2 KB
admin	PBW4_Gas	PBGasData_overflowdetails.csv	03/25/2026 01:13:41 pm	127.0.0.1	33 KB


FILE UPLOAD HISTORY

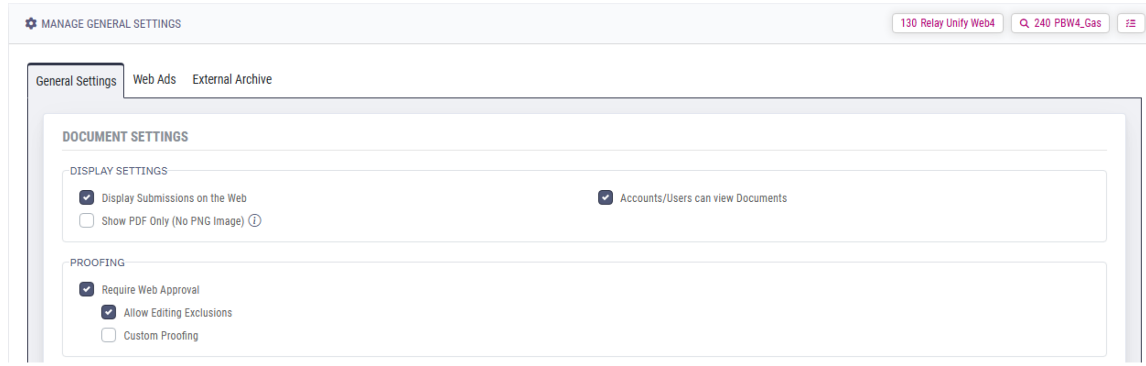
Username	Submission Type	File Name	Upload Date	IP Address	File Size
admin	PBW4_Gas	PBGasData_overflowdetails.csv	03/25/2026 02:44:04 pm	127.0.0.1	33 KB
admin	PB_Mill	Normal_1_of_1.pdf	03/25/2026 01:59:13 pm	127.0.0.1	1011.2 KB
admin	PB_Mill	Normal_1_of_1.pdf	03/25/2026 01:13:52 pm	127.0.0.1	1011.2 KB
admin	PBW4_Gas	PBGasData_overflowdetails.csv	03/25/2026 01:13:41 pm	127.0.0.1	33 KB
admin	PB_Mill	Normal_1_of_1.pdf	03/25/2026 11:01:08 am	127.0.0.1	1011.2 KB

The user can see their uploads under Upload Files.

Web Approval

Once a submission has run through Breakpack, the submission can enter Awaiting Approval status which requires an admin user to approve the Submission on the web before it can continue through to become a job and be printed.

This is enabled at the Submission level under the Web & Payment Settings tab and then click on Document Settings within the Submission type.



Display Submissions on the Web – This must be checked for documents from this submission to be viewed by an admin user in the Web Proofing, Submission Dashboard, or Document Search.

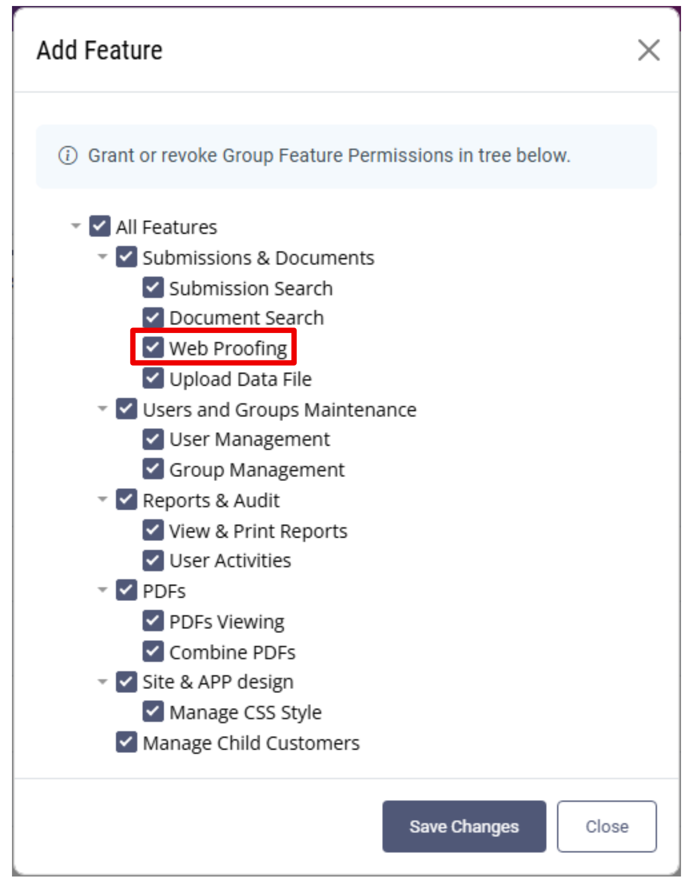
Show PDF Only (No PNG Image) – Turns off PNGs on the web for this submission type. Most documents generate a PNG of the document as their default way of viewing the documents (they still have a button/option to view it as a PDF as well). If this is checked the default for viewing the document becomes a PDF, nothing else. This setting will only apply to the Submission Dashboard and Web Proofing pages for the admin user.

Require Web Approval – If this is checked, the submission will stop in Awaiting Approval status until an admin views the Submission and approves/rejects it.

To give an admin user the ability to approve a submission, select the admin user under Manage Users, then go to the Feature Permissions Tab. Click on Manage Permissions and select Web Proofing. Inherently, an Admin user will already have this permission.

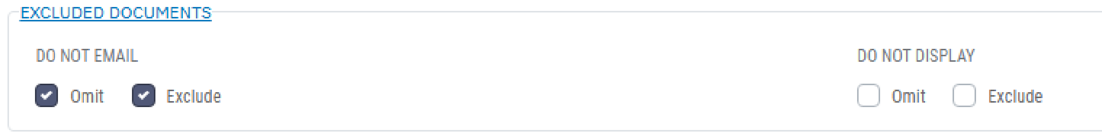
The admin user will see submissions that are in Awaiting Approval status under Web Approval. Once the Submission is approved, the admin user can view the progress within the Dashboard.

Allow Editing Exclusions – If this is checked, then the Mail Type column will be have a dropdown list of the exclusion options. This allows the admin user the ability to manually change documents to be excluded as No Mail, Exclude, or Omit.



Excluded Documents

These are the behavior settings for exclusions.

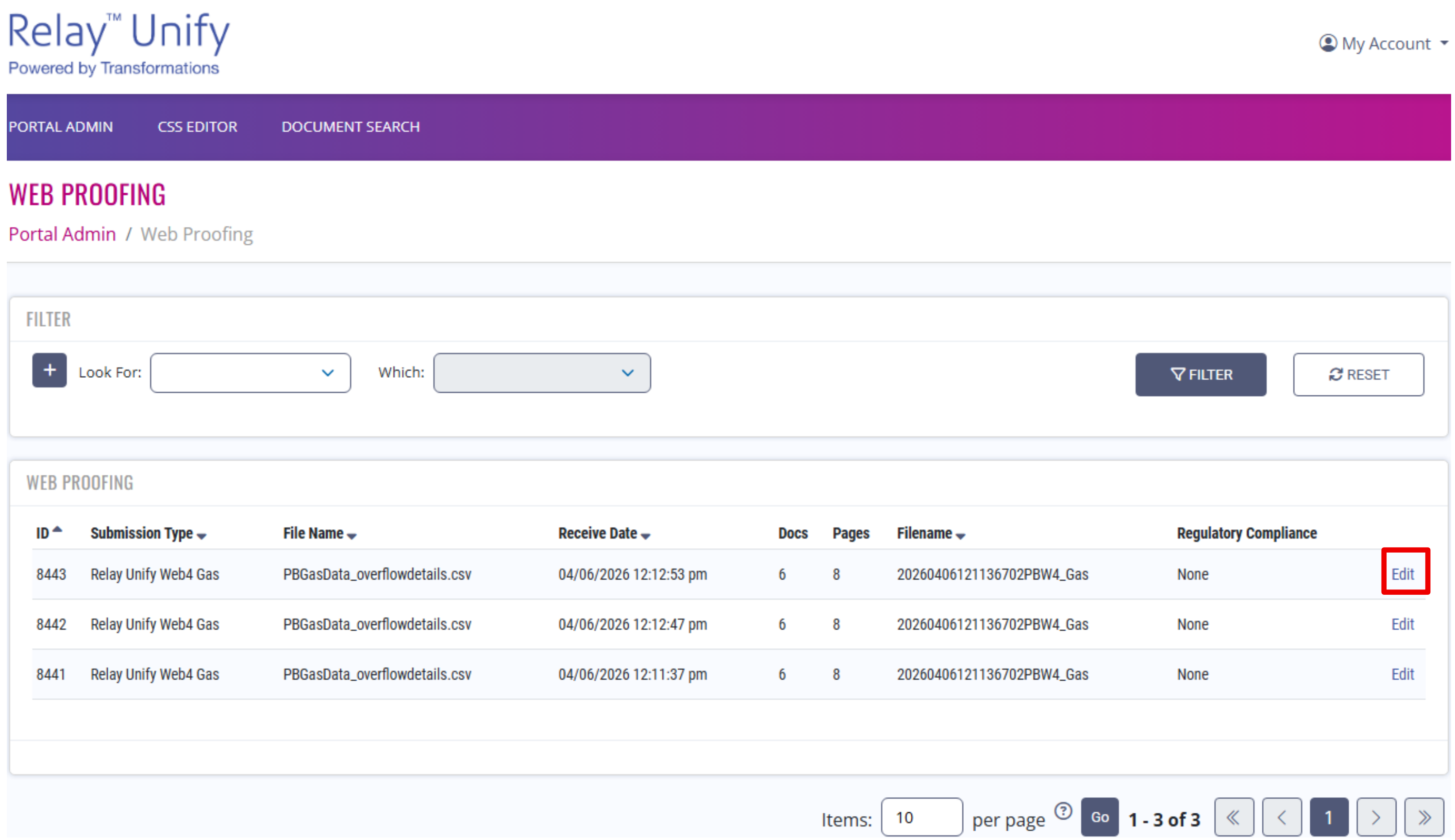


For users that are receiving their documents by email, if their document was marked as Omit or Exclude, then they will not receive an email.

Do Not Display will not display documents marked as Omit or Exclude for Web Approval or the document list within the submission in the Web Dashboard.

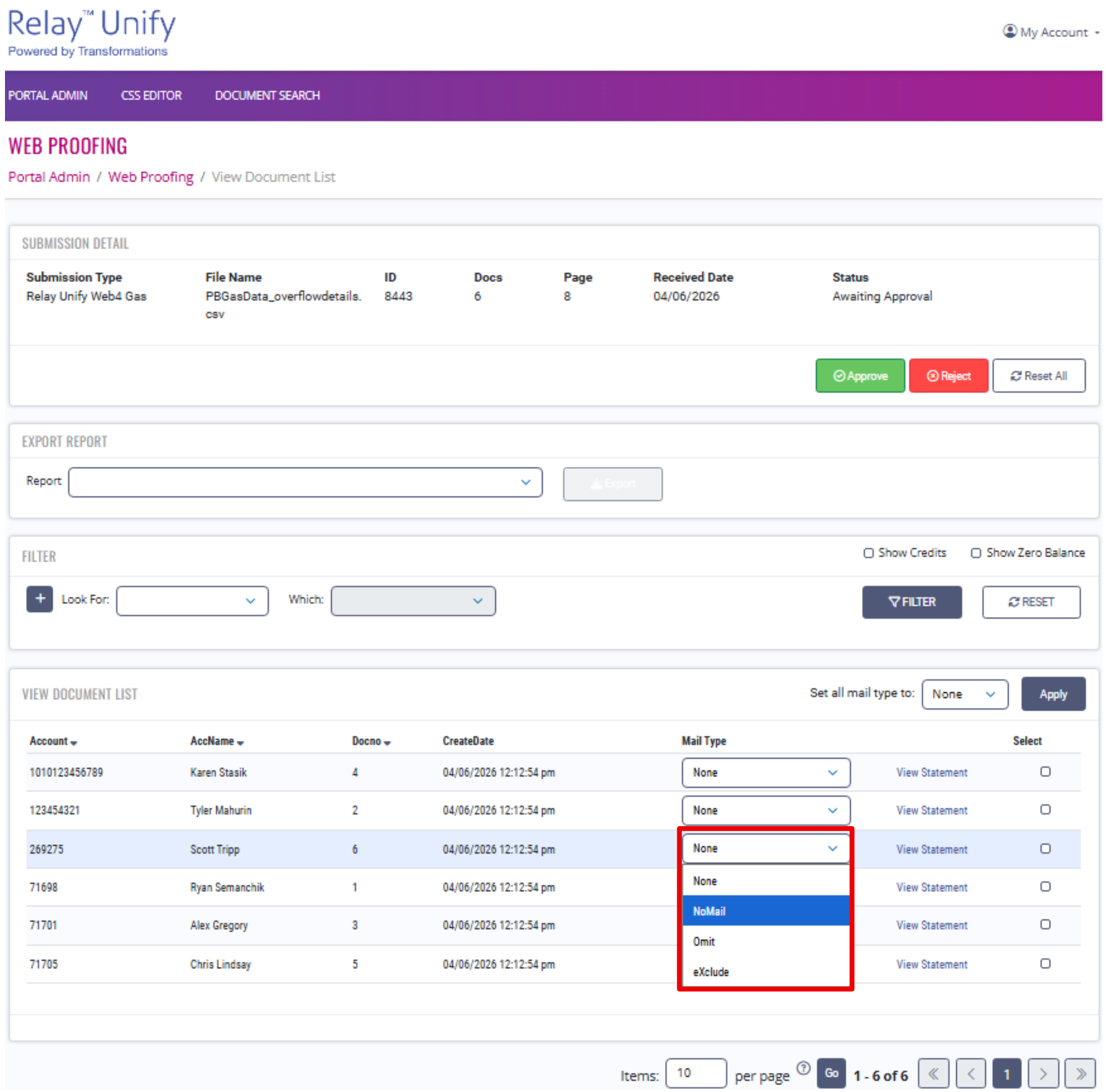
Standard users will see their document on the User Main page regardless of these settings.

Once a submission is in Awaiting Approval status, that submission will appear under Web Proofing, within the Admin Main page options. Select the submission by clicking the Edit button to see the documents and to approve/reject the submission.

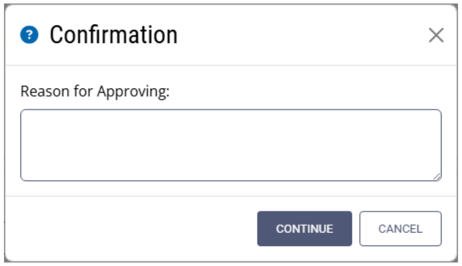


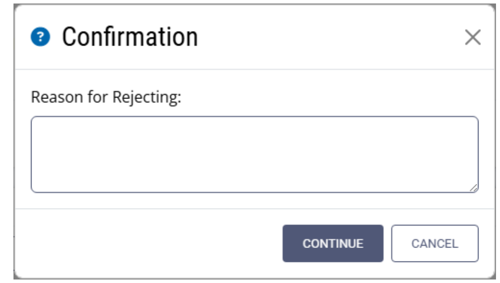
The admin user can view each of the documents, override the Mail type for any document, then decide to Approve or Reject the submission. To approve click the Approve button. To reject the submission click the Reject button.

Any documents that are marked as Exclude or Omit will not receive email notifications including HTML emails and SMS messages.



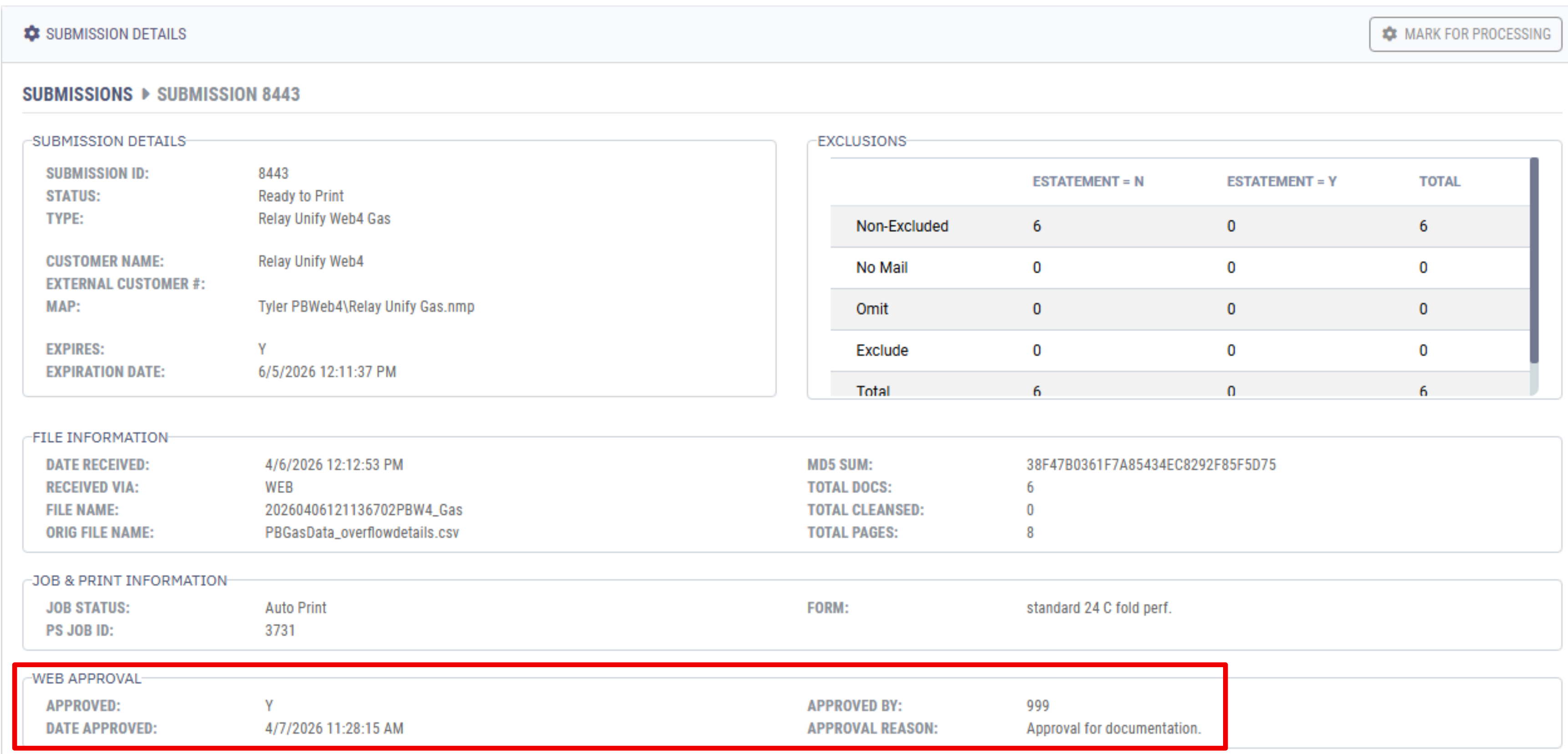
Whether it was approved or rejected, that information will be logged. If it is rejected, another data file will need to be submitted to process the submission or you can resubmit from uControl.



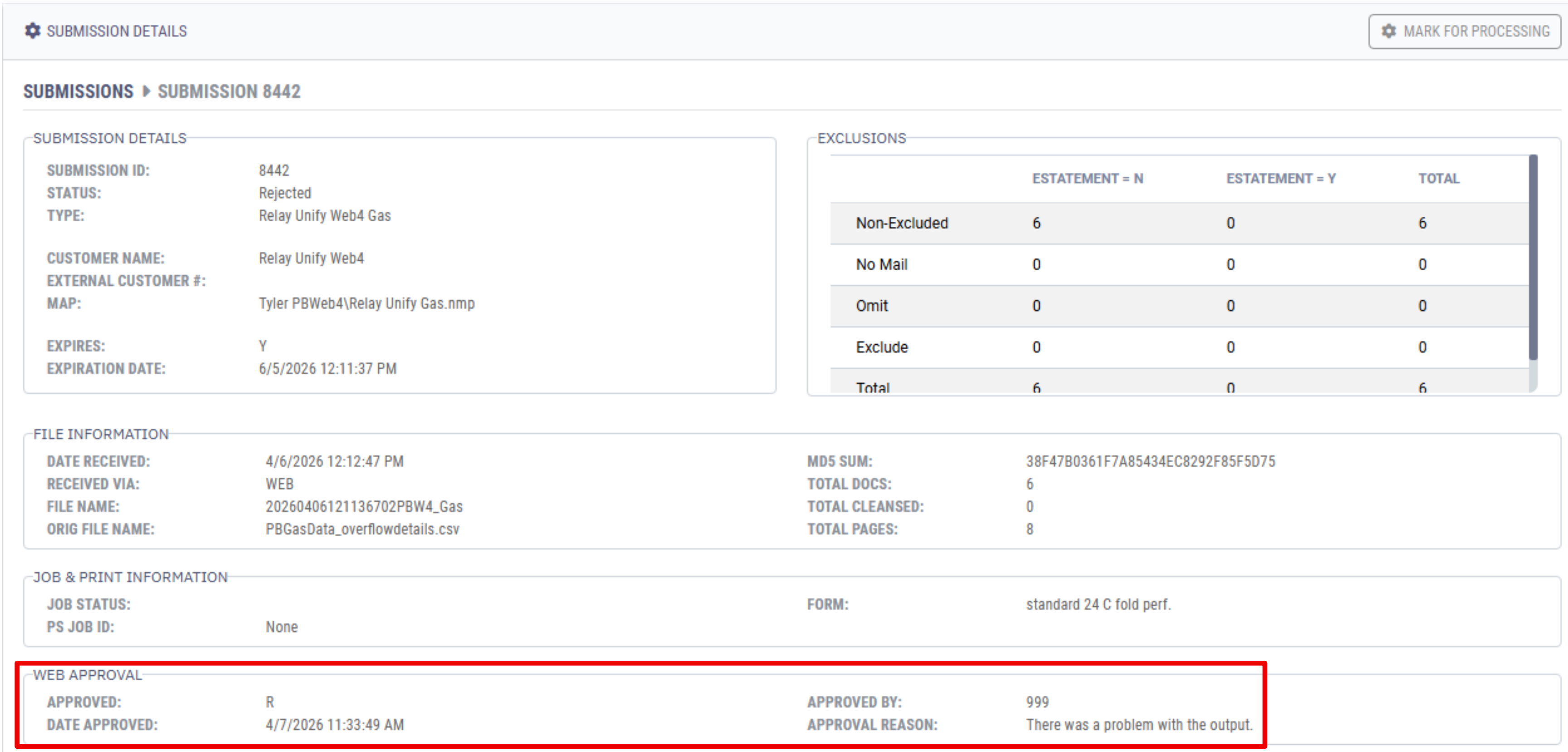


If you right-click on a submission in uControl (or uSetup under the Submissions tab under Job Tracking within the submission type), the submission Transaction details display if the record was approved or rejected. The user and name/reason will be logged with a timestamp.

Sample of an approved submission:



Sample of a rejected submission:



Submission is Ready for Approval Email Event

To create a new email event, click the + Add Email Event button.

Event – Select Submission is Ready for Approval.

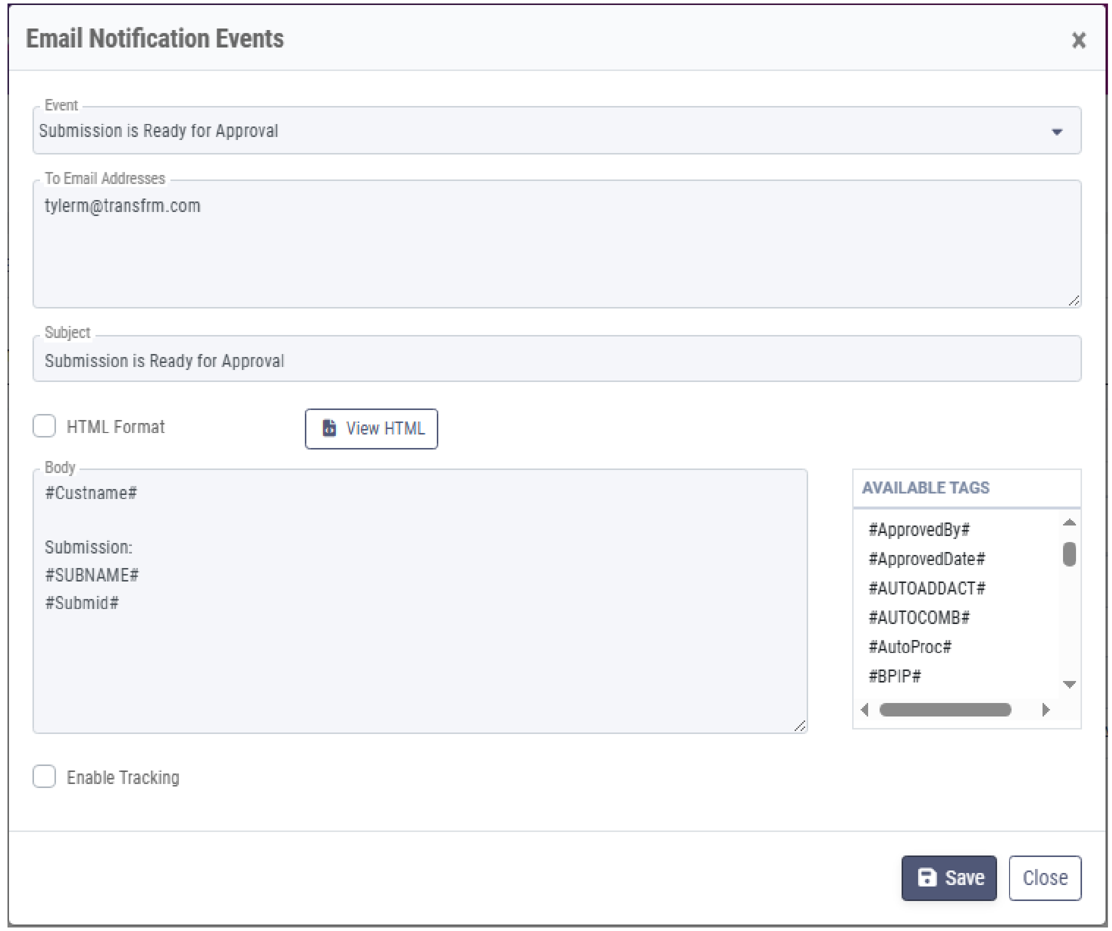
To Email Addresses – Enter the email addresses of those needing to receive this email event. If multiple emails, use a semicolon as the delimiter.

Subject – Enter the text that will be displayed as the subject line of the email.

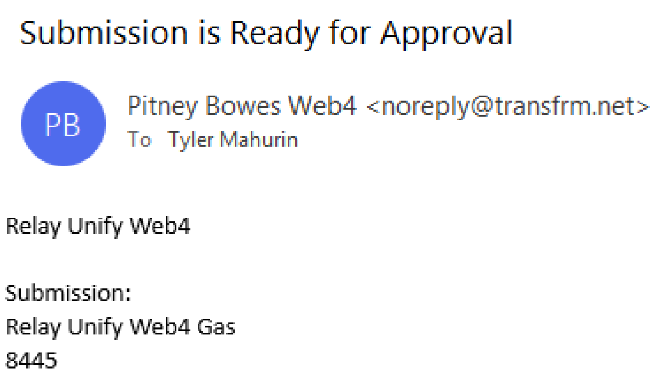
Body – Enter the body of the email. This can be HTML if desired. Simply check the **HTML Format** box.

Click the **View HTML** button to preview the email.

Available Tags – These can be added to the subject line, or the body of the email. Simply click on any tag in the list and then click the Add button to insert it to the text of the subject or body of the email.



Sample Setup:



Tips:

To get to the Email Events location, navigate in a submission to the Email Notifications Tab > General Settings > Email Notification Events.

Submission Rejected Email Event

To create a new email event, click the + Add Email Event button.

Event – Select Submission Rejected.

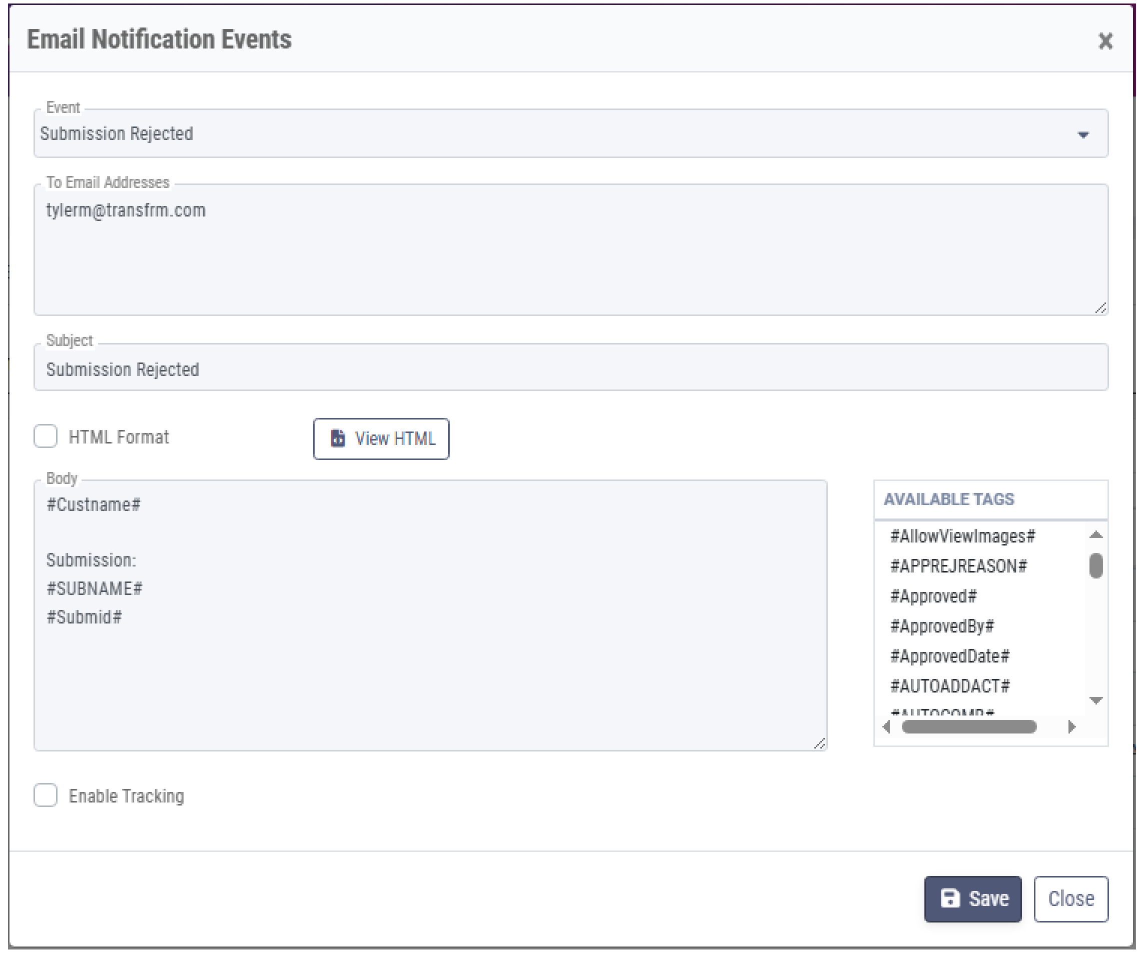
To Email Addresses – Enter the email addresses of those needing to receive this email event. If multiple emails, use a semicolon as the delimiter.

Subject – Enter the text that will be displayed as the subject line of the email.

Body – Enter the body of the email. This can be HTML if desired. Simply check the **HTML Format** box.

Click the **View HTML** button to preview the email.

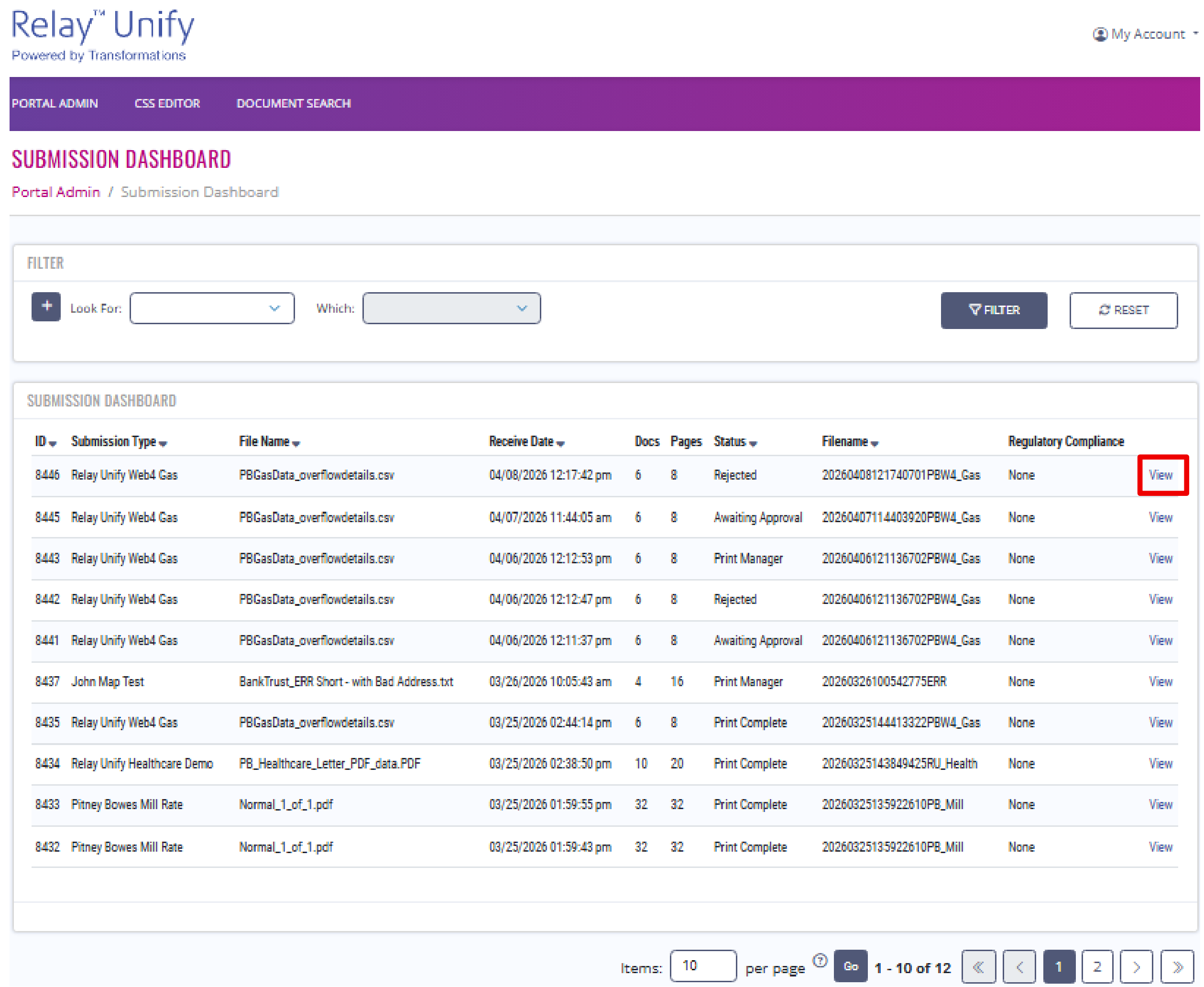
Available Tags – These can be added to the subject line, or the body or the email. Simply click on any tag in the list and then click the Add button to insert it to the text of the subject or body of the email.



Sample Setup:

Submission Dashboard

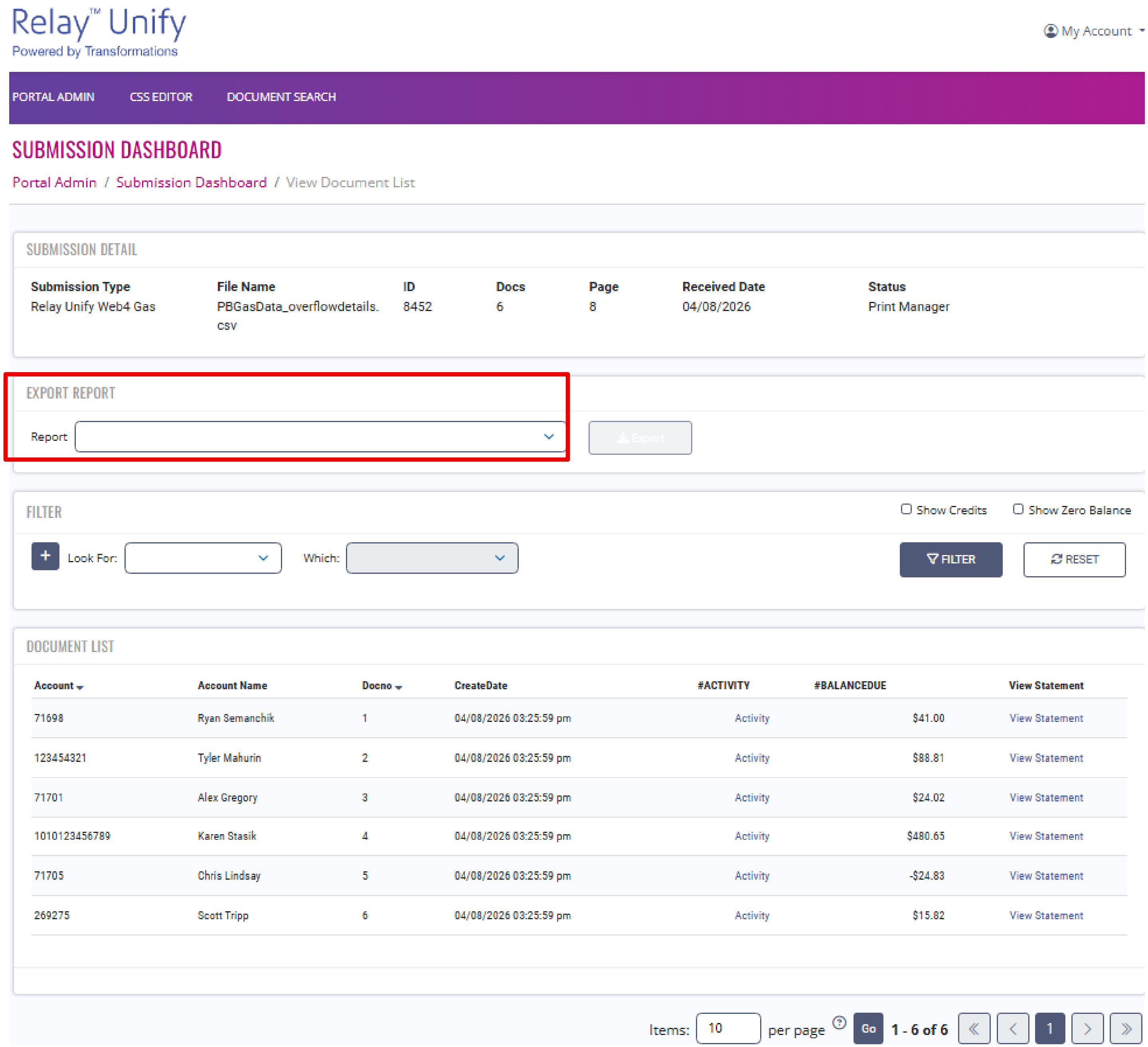
All submissions are listed in the Submission Dashboard. Admin users can monitor their status or search for a specific submission.



An individual Submission can be selected to view documents, have more search options, or view reports for the Submission.

Tips:

Submissions that have been deleted/cancelled manually or using uDelSub.exe will not appear in the Dashboard.

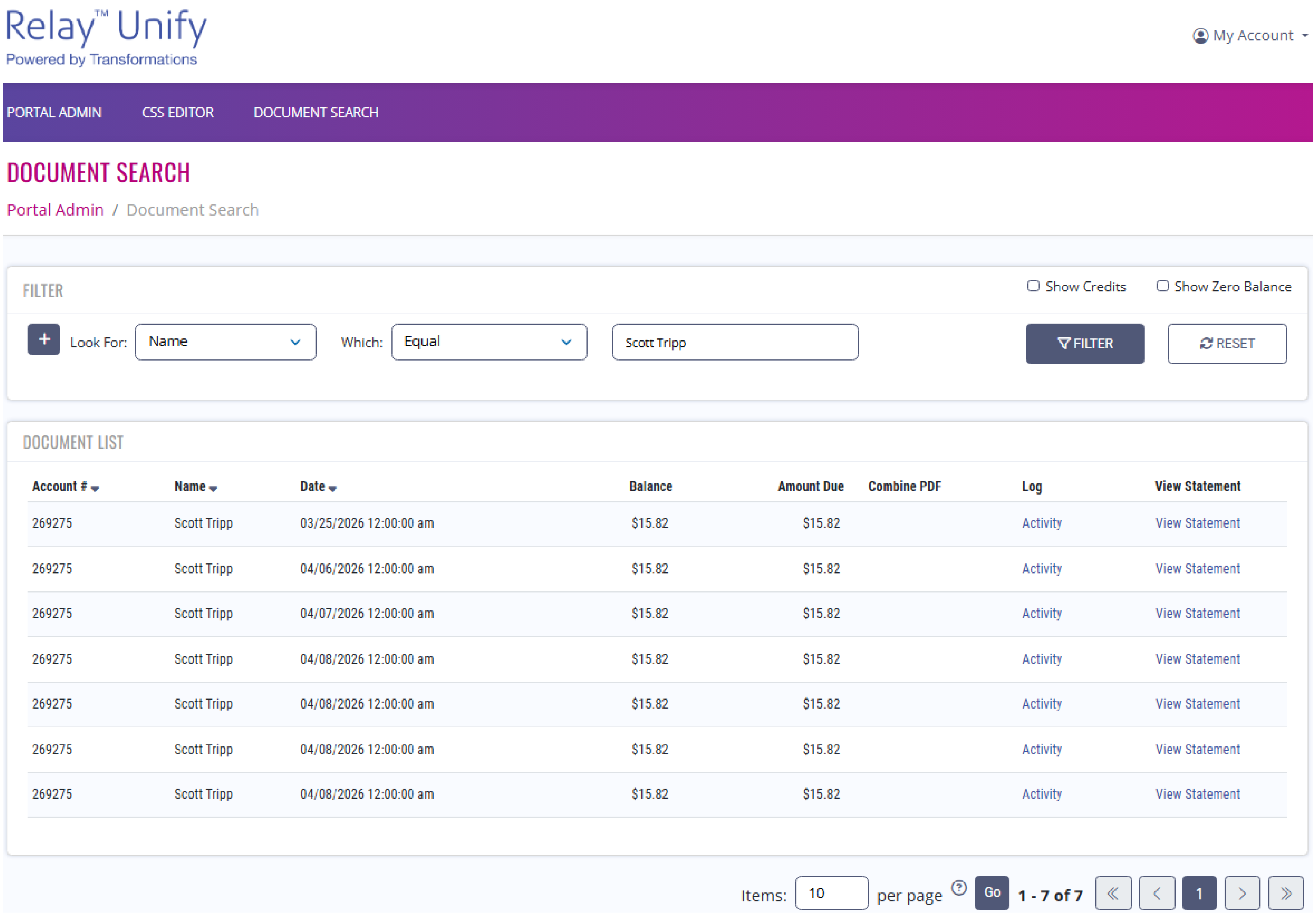


The Reports dropdown menu will list the Autoprint Reports that have been generated for this submission/job.

Since admin users view is always at the submission level, only information pertaining to that submission will be on the reports. Complete Job and print level reports that contain information about multiple submissions must be accessed elsewhere.

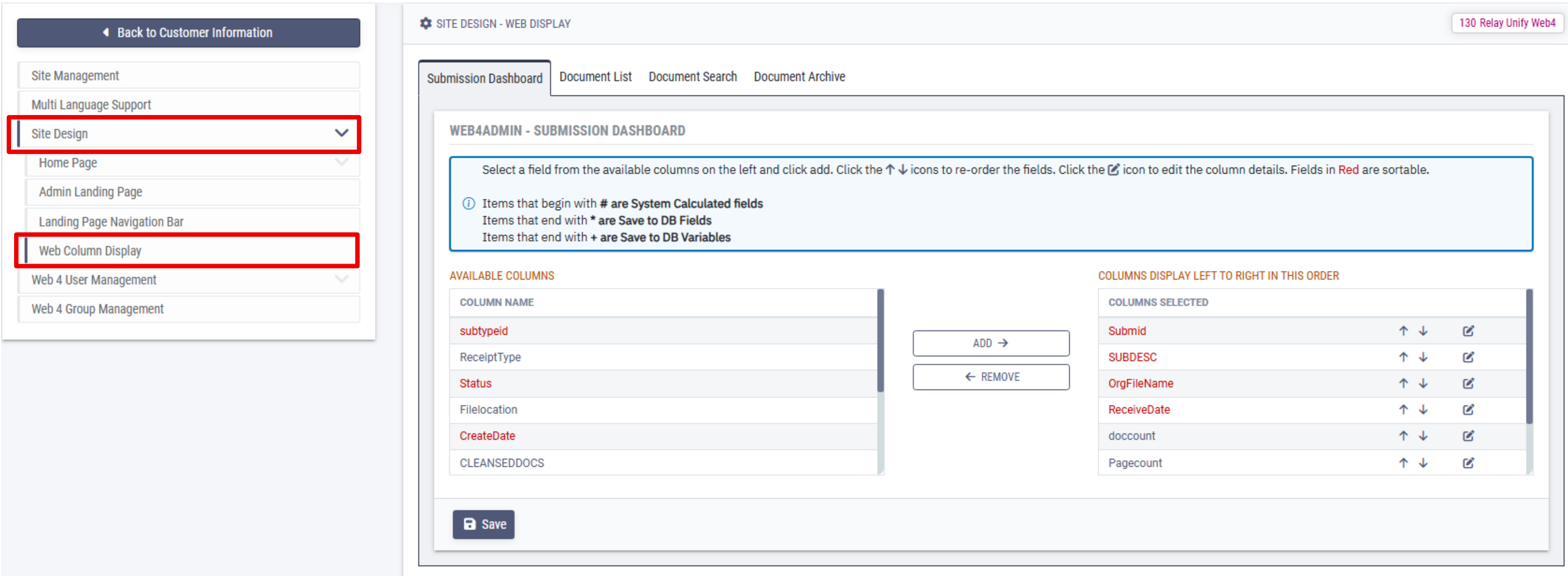
Document Search

This is used by admin/CSR users to find documents based on various search criteria. These columns and search criteria can be customized including adding save to DB fields, using the Web Display settings.



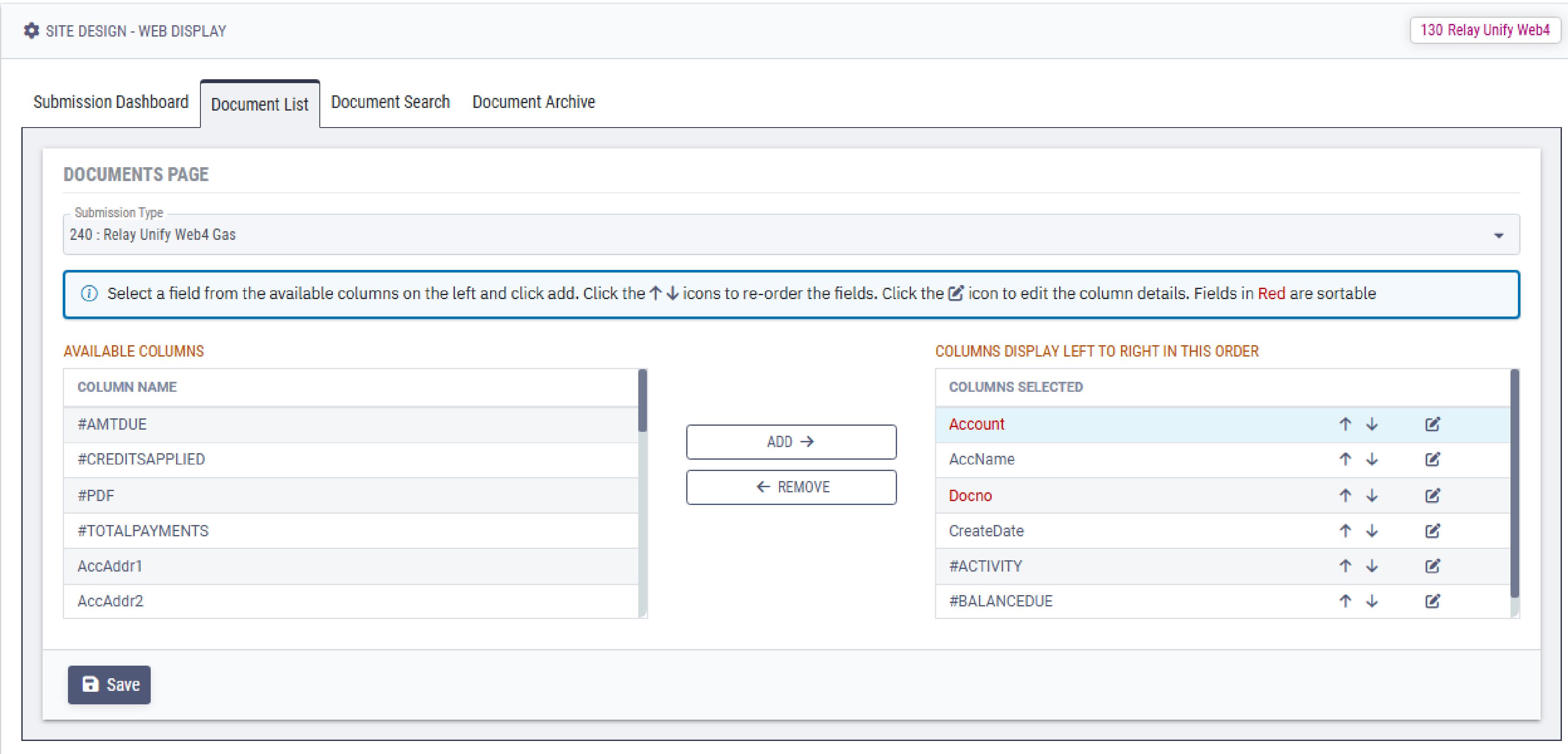
Web Display Settings

To edit the columns that are displayed on the web, go to Web Setup > Site Design Dropdown > Web Column Display Tab. Click on the Web Page Display button.

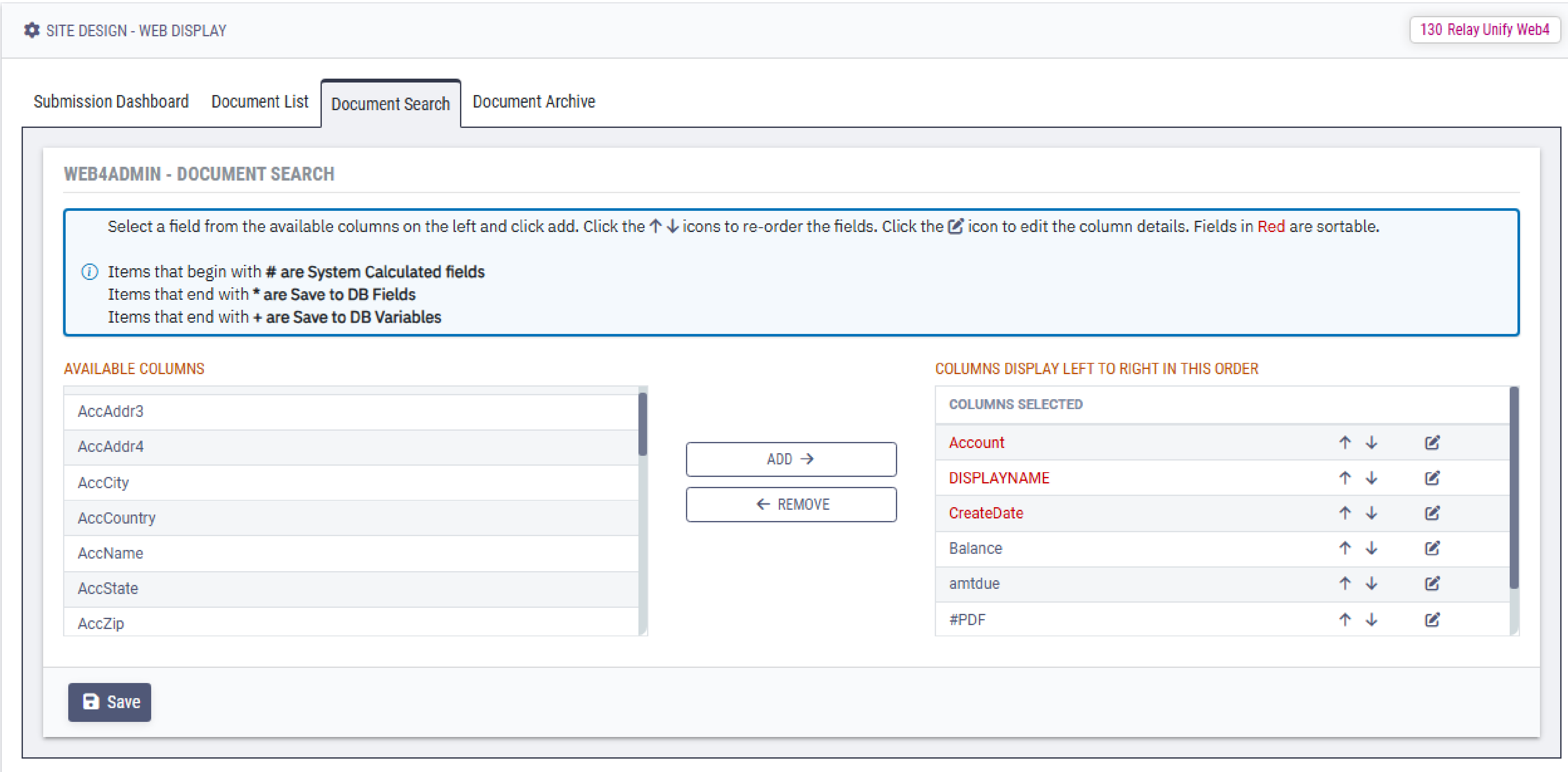


These are the default settings:

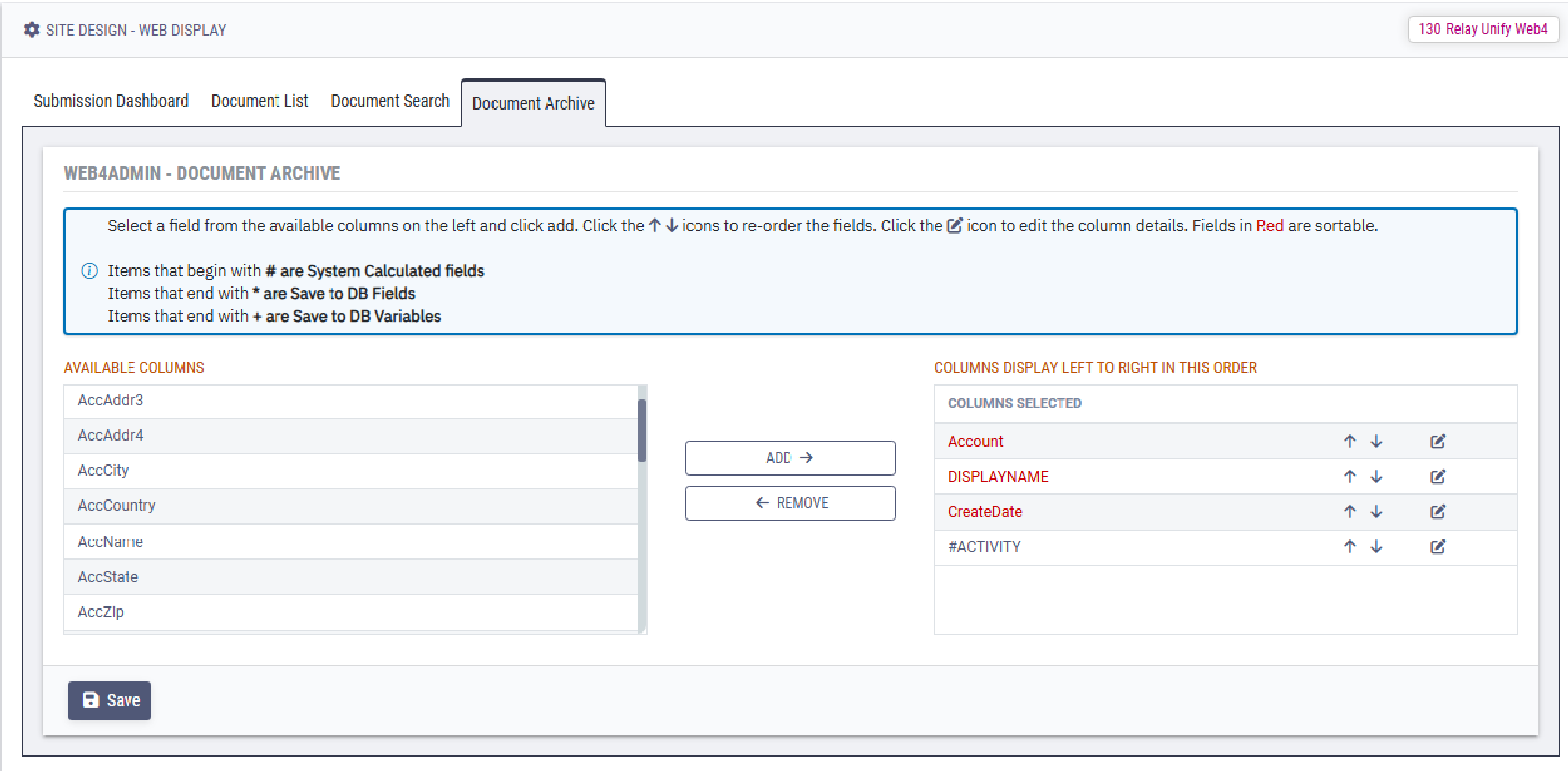
Document List (Standard User Main Screen)



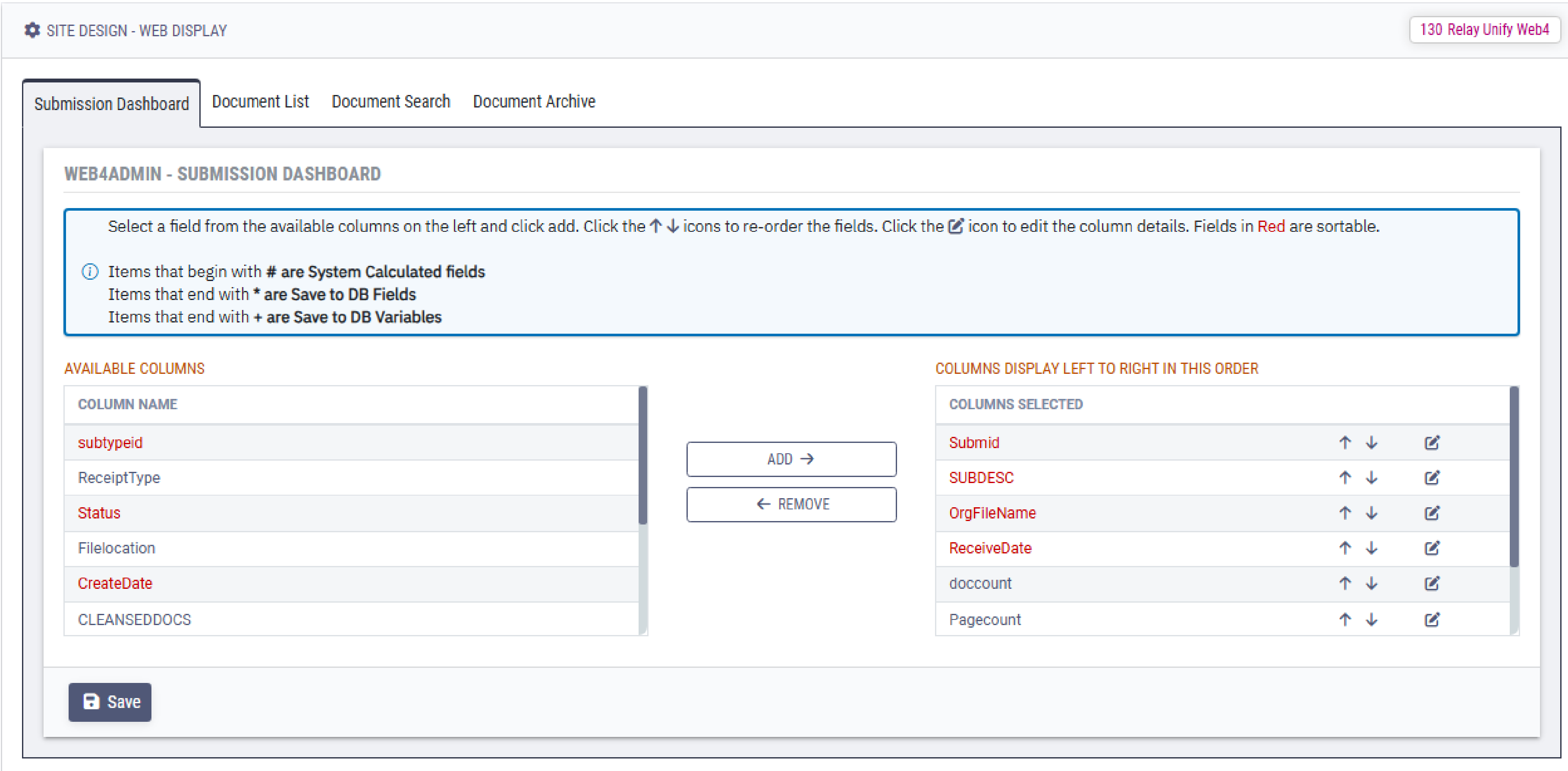
Document Search (Admin)



Document Archive (Admin)

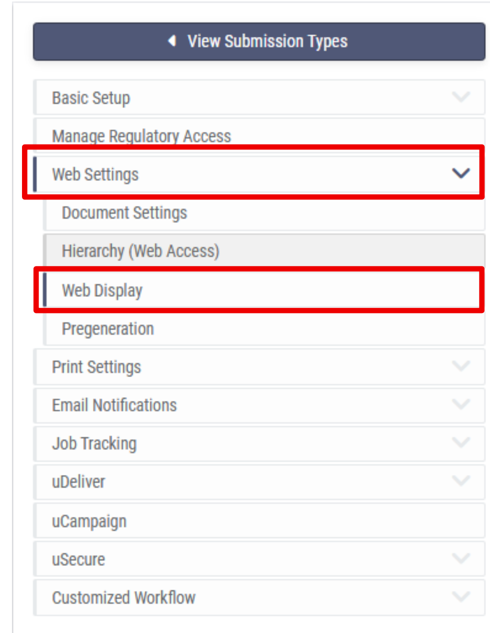


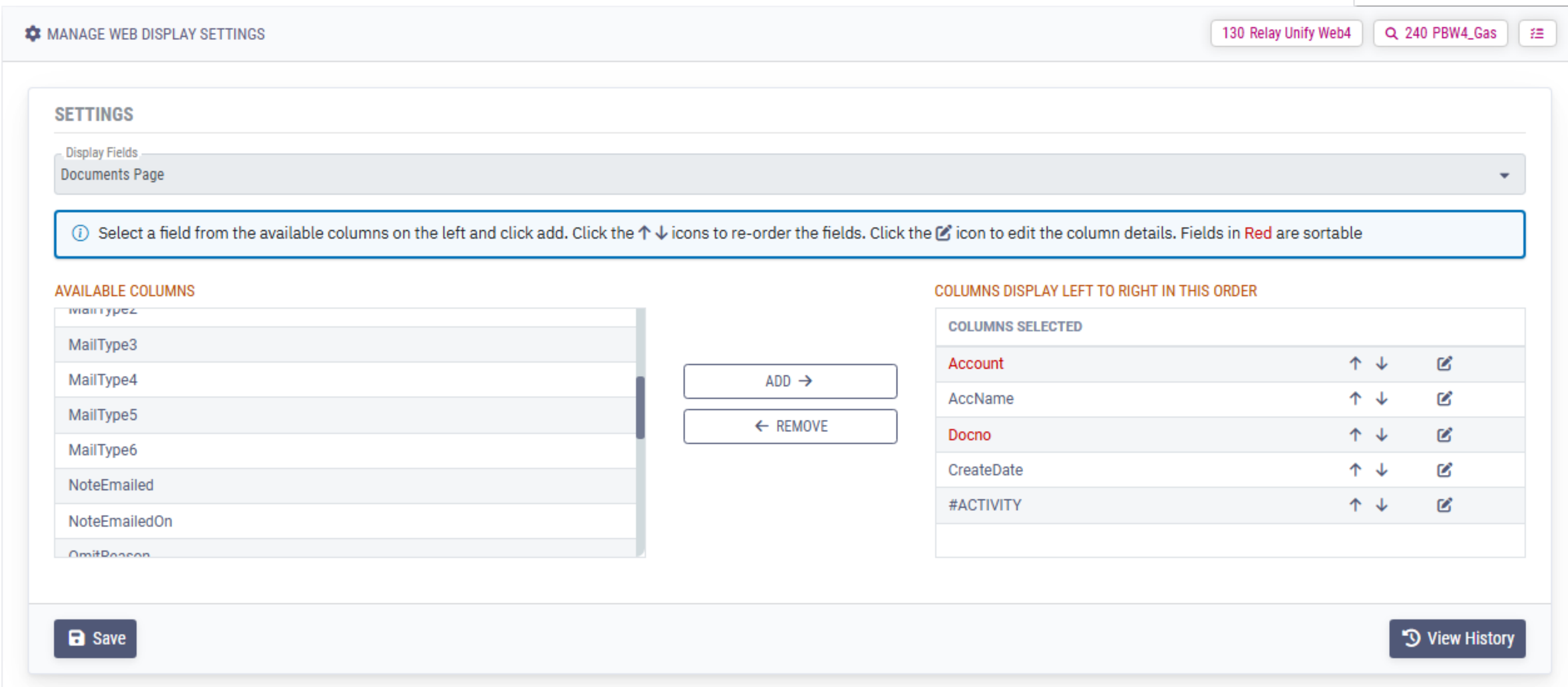
Submission Dashboard (Admin)



Web Display (at the submission level)

This is edited within a submission type, under the Web Settings Dropdown, click the Web Display Tab. This is to customize the columns for a submission within the Dashboard once a specific submission has been selected.





For all of the 5 Web Display settings:

- The RED fields are searchable/sortable on the web; the black ones are not.
- Save to DB fields will be listed with an * after the name.
- You may remove any of the ones that are listed by default by selecting a column heading and clicking the Remove button.
- You may add any field listed by selecting it in the list and clicking the Add button.
- The columns can be selected and moved from left to right to change the order they display on the web.

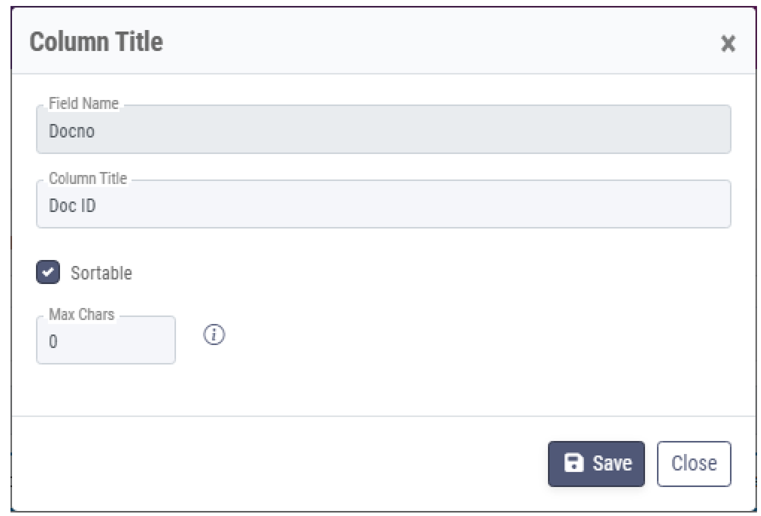
Select a column, click the green Edit Column button to further edit the column.

The field name cannot be edited.

Column Title – The title of the column that will be displayed on the web.

Sortable – If this is checked, the field will appear in the dropdown for filtering and searching for documents. The order the fields appear in the dropdown correspond to the order displayed across the columns.

Maximum Chars – This will be the number of characters that appear in the column. If this is 0 all characters will be displayed.



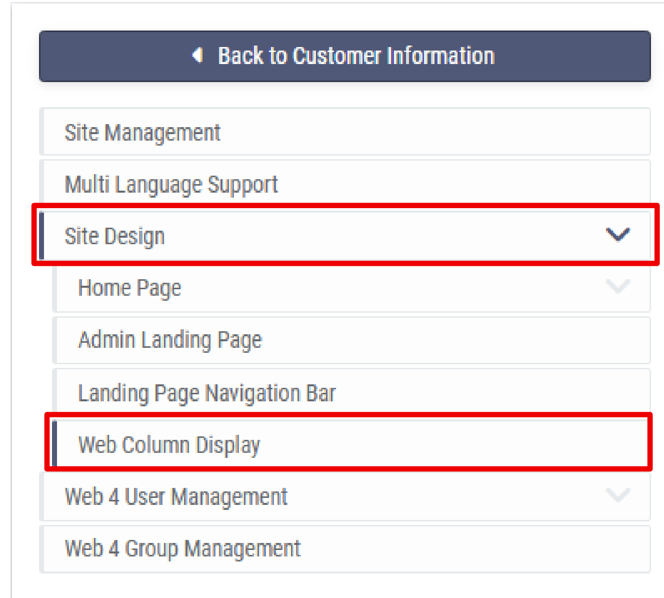
Tips:

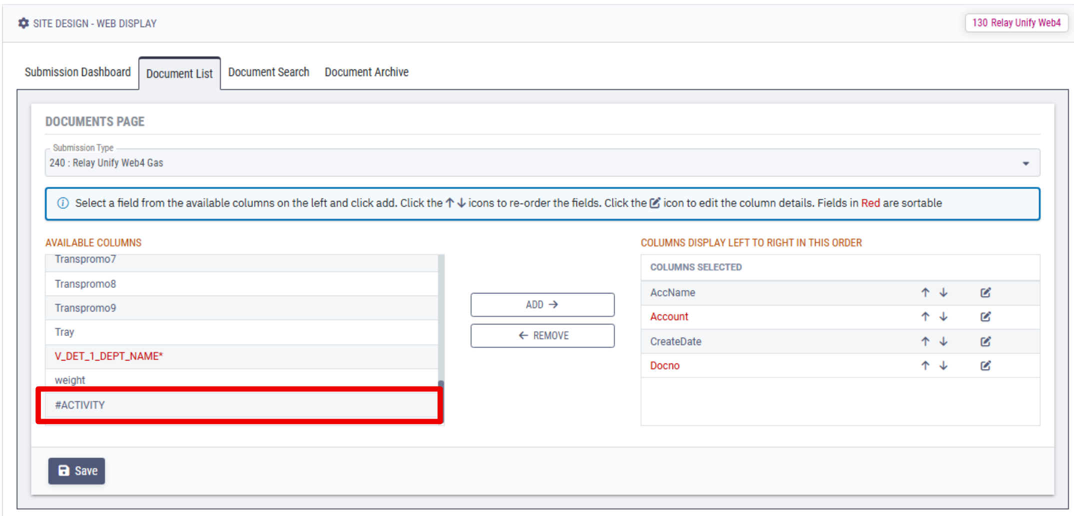
Documents will be sorted by the newest document first for the Document List (Standard User Main Page). The Dashboard pages for an admin user will be in descending order according to the first column displayed. The sorts only apply to the page not the entire set of records.

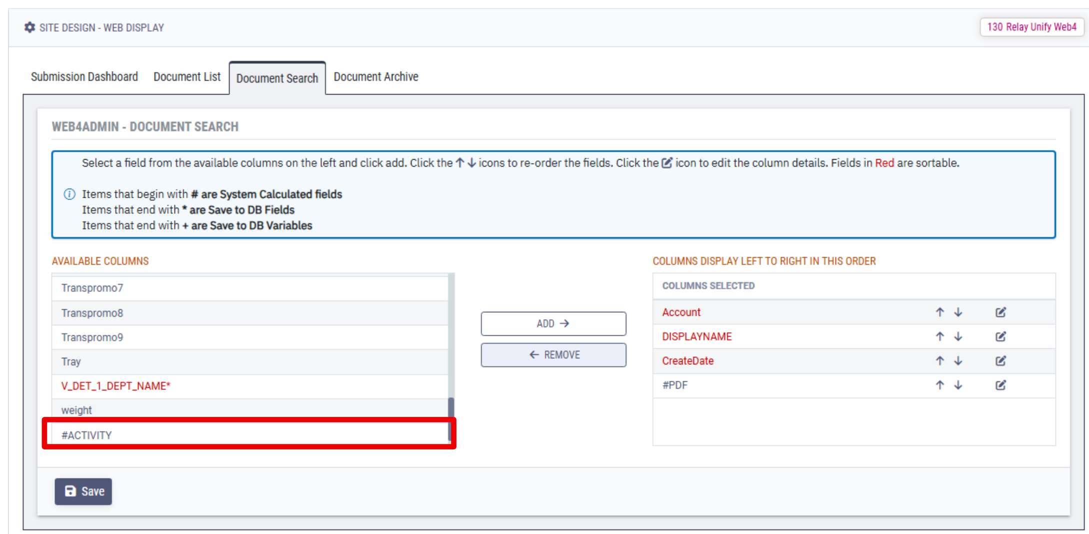
Activity Log

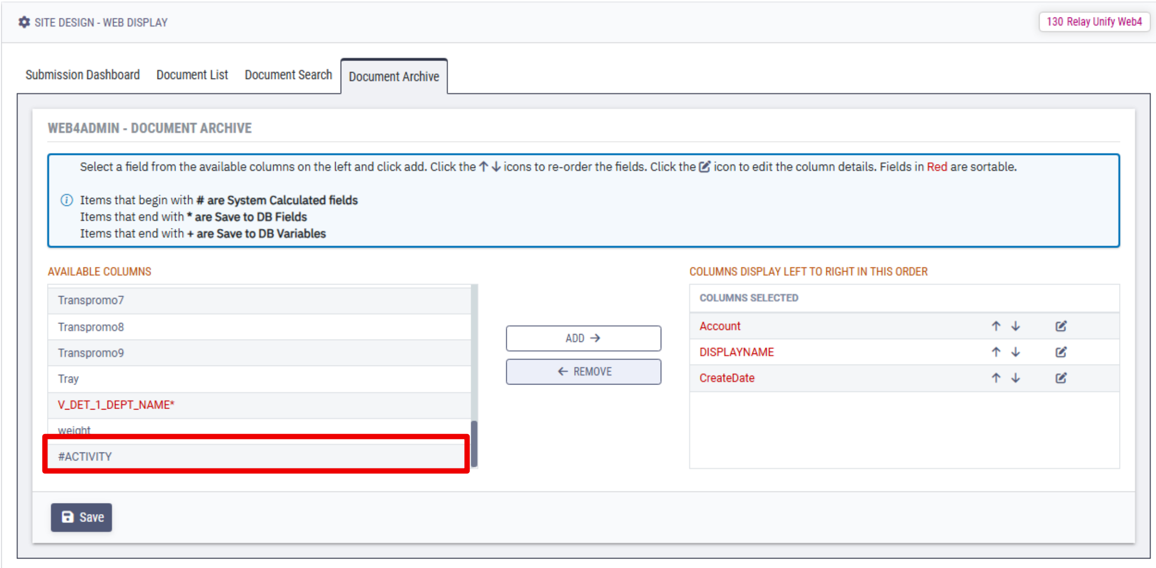
To set up activity log go to uSetup Web > Web Setup > Site Design Dropdown > Web Column Display Tab.

Add #ACTIVITY for the Document List or the search page as desired.

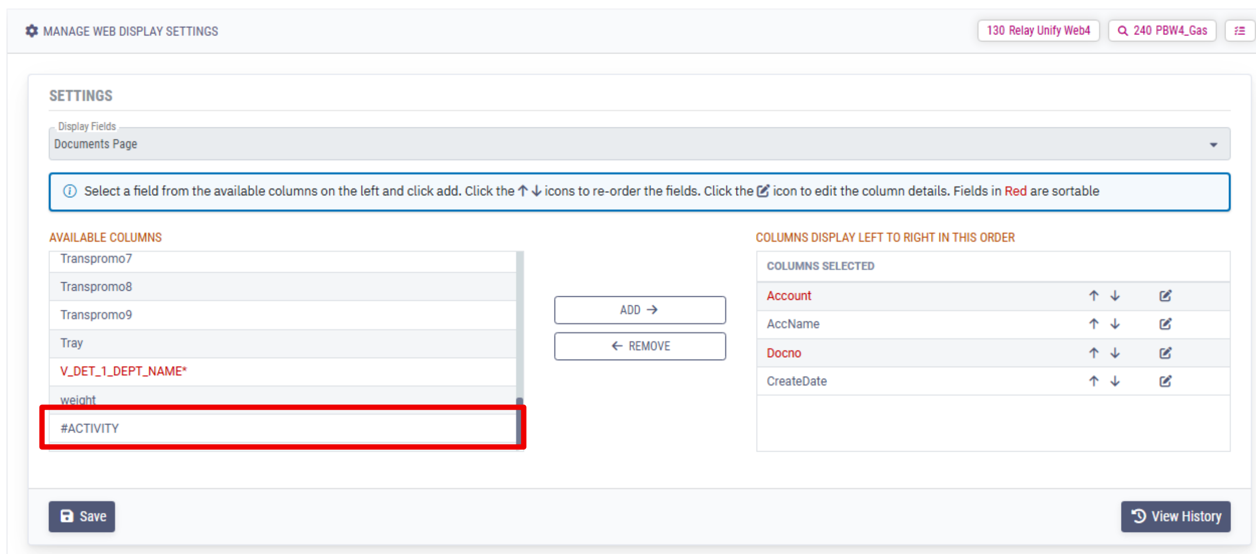




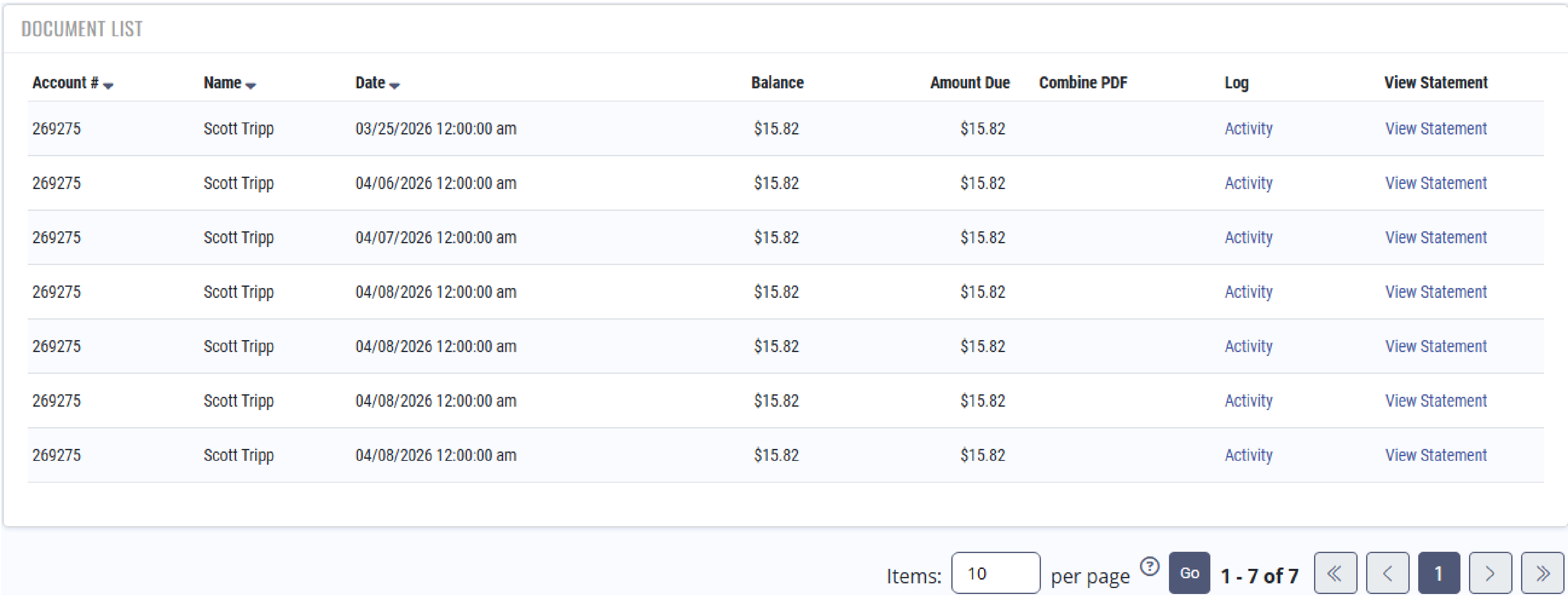




To add it for the submission web display search page once a submission is selected from the Admin Dashboard, go to the Web Settings Dropdown Tab of the submission and select Web Display Tab.



Permissions do not need to be granted to specific user types to see the Activity Log. Log in as any of the Admin type users that have been set up to see the Activity Log in the appropriate locations. Access any of the pages you have displayed #ACTIVITY on and you will see the Activity Log button next to the icon to view the document.


DOCUMENT LIST

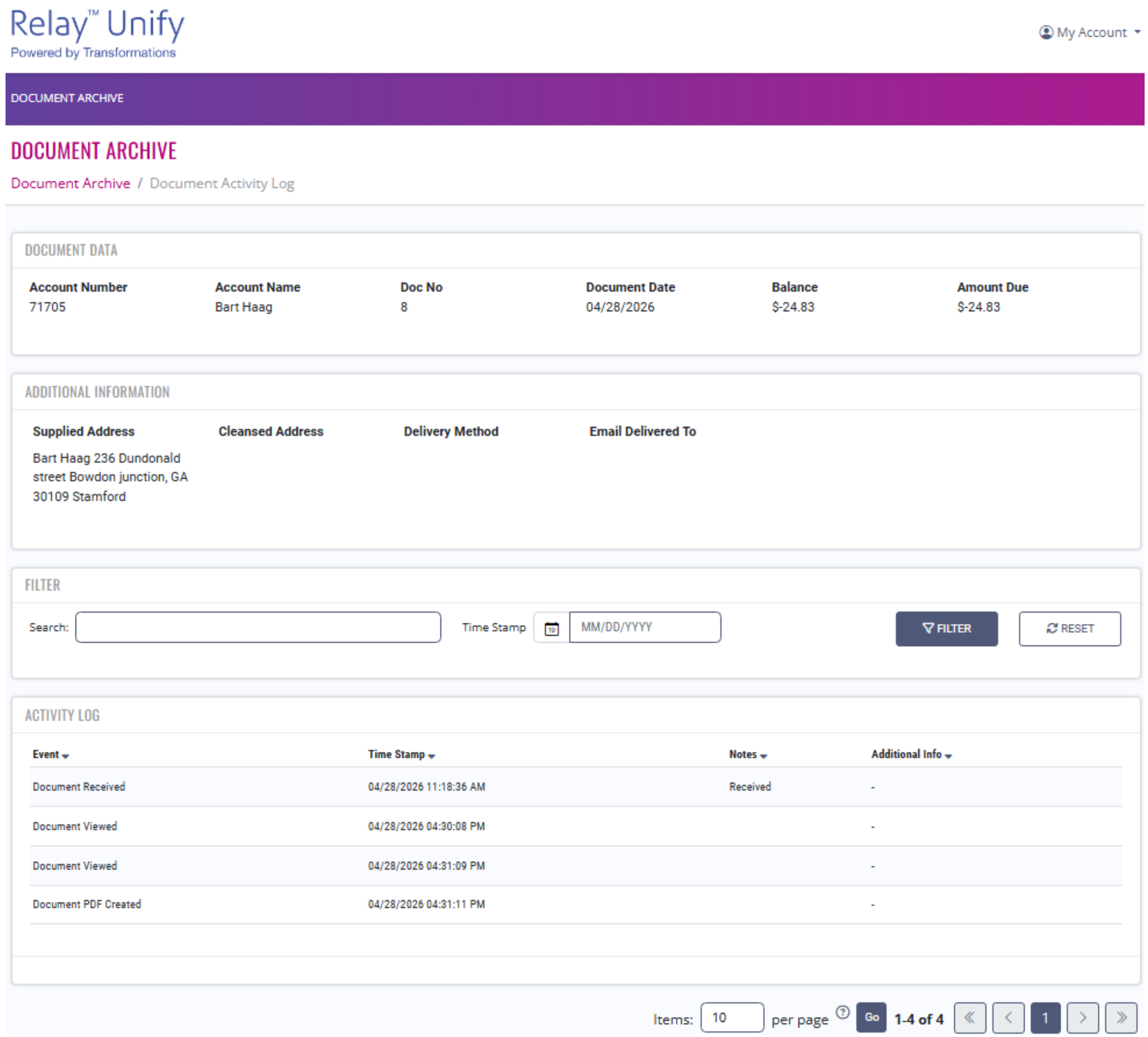
Account #	Name	Date	Balance	Amount Due	Combine PDF	Log	View Statement
269275	Scott Tripp	03/25/2026 12:00:00 am	$15.82	$15.82		Activity	View Statement
269275	Scott Tripp	04/06/2026 12:00:00 am	$15.82	$15.82		Activity	View Statement
269275	Scott Tripp	04/07/2026 12:00:00 am	$15.82	$15.82		Activity	View Statement
269275	Scott Tripp	04/08/2026 12:00:00 am	$15.82	$15.82		Activity	View Statement
269275	Scott Tripp	04/08/2026 12:00:00 am	$15.82	$15.82		Activity	View Statement
269275	Scott Tripp	04/08/2026 12:00:00 am	$15.82	$15.82		Activity	View Statement
269275	Scott Tripp	04/08/2026 12:00:00 am	$15.82	$15.82		Activity	View Statement

Click on the Activity button.

This will show the activity of the document including the timestamp of each event and by which users.

Events that will be Displayed in the Event Log:

- Document Received
- Document Viewed
- Document Printed
- Document PDF Created
- Document Combined PDF Created
- Email Sent
- Text Sent
- Text Reply Received
- Track N Trace Scans.



PreGeneration

Submission Level

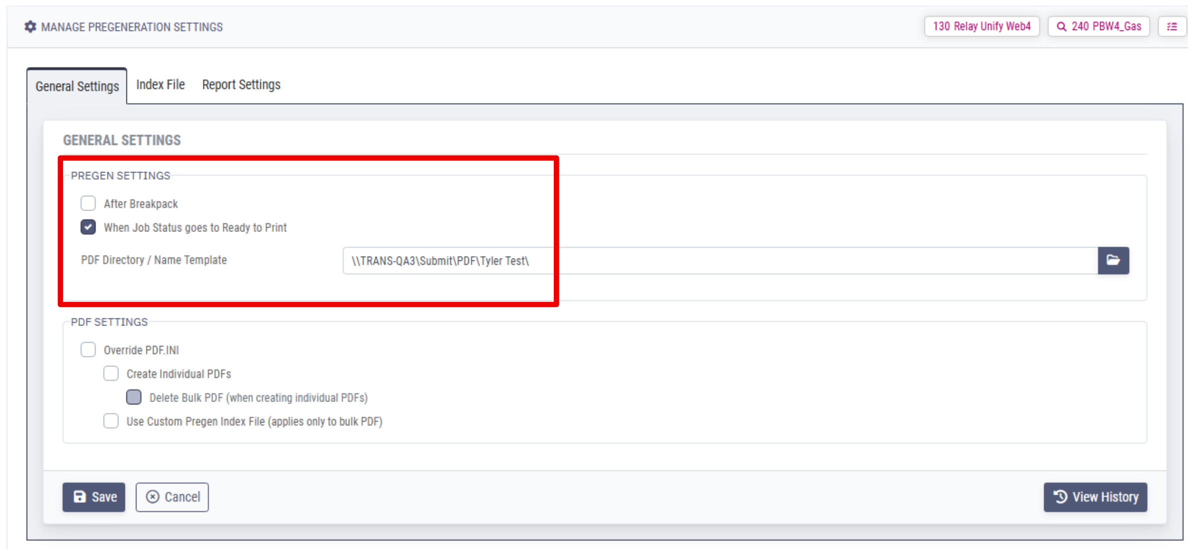
Within a submission type, under the Web & Payment Settings Tab, PDF PreGeneration can be set up to generate individual PDFs or a Bulk PDF of the documents for a submission.

After Breakpack – This will generate the PDF of the document directly after Breakpack, prior to Cleanse or Presort.

When Job Status goes to 'Ready To Print' – This will generate the PDF after it has gone to Ready to Print status. This is recommended since all processes have occurred by this point.

PDF Directory/PDF Name Template – Enter the full path to the directory you want the PDFs to be archived. This should begin with \\server\submit\PDF\... The PDF directory must be accessible from the web server.

When enabling and setting up pregeneration on a submission type, there will be a warning if submissions have been run to create documents prior to enabling this setting. The warning will ask the user to pregenerate all older submissions that have not been pregenerated or not. If the user selects "YES", the previously run submissions will be pregenerated and the documents will be placed in the specified directory. If the user selects "NO", then the previous submissions will not be pregenerated; only future submission will be pregenerated.



If the file contains illegal characters, they will be replaced with an underscore. If a field is blank, the output will be blank. The files have the same name they will not be overwritten; The file name will have _1, _2, etc. appended to the name prior to the file extension.

The PDF will then be streamed from that folder rather than generated on the fly when documents are being viewed on the website. PDF's generated with a formatted name will not be used on the web for PDF display. If the Pregenerated PDF's are formatted names, then the Web call for PDF will generate the PDF on the fly. The main reason for this is the possibility of a non-unique PDF name. As an example if the PDF is being named for Sys_Acct_ID, we can identify the fact that we have already created one PDF with the Same name at creation time (already exists on the file system), but when creating a single PDF at Web Display time we will not know whether to use the pdf named for the Sys_Acct_ID or the PDF named for Sys_Acct_ID_1, Sys_Acct_ID_2, etc.

Ucompose

If the user has a specific naming specification, then a Save to DB field can be used that will allow the PDF to be named as desired.

In uCompose create the Field. A suggestion for the Name would be Doc_PDF_Name. Check the Save to DB checkbox in Field definition.

If the name will be complex from multiple variables or data, then set the field to not be assigned. In the Display section, use conditions and functions to create a variable that defines the name to use. Then assign the variable to the field using the Assign Field command.

During Breakpack the Doc_PDF_Name will then contain the desired name.

Tips:

Variables should not be used in the directory structure unless the directory already exists.

Fields must be defined in the map and on each document or they will not be used as part of the directory/naming structure.

If there is no name structure the default is by document ID for each document has a unique name.

RPPregen

RPPregen is run as a scheduled task. It should be run in a directory where the Makepdf.exe program and PNGDLL.dll exist. The location and user running the program should have access to the data, images and fonts necessary to create the pdf.

RPPregen will run multiple copies of MakePDF which uses the PNGDLL to generate the PDF's.

PNGDLL.dll

During PDF PreGeneration, the PNGDLL.dll checks for the existence of the fieldnames in the PDF Directory field in the subtype table and uses the fieldnames for the PDF Naming. PDFs created with formatted names will not be used by the Web. When PDF's are created for use on the Web, the PDF's will not be created in the Pregen folder.

If PreGenerating both After Breakpack and Ready to Print, the Ready to Print PDF's will overwrite the After Breakpack PDF's.

Each time Pregen runs for the Submission, a new Individual PDF with 0000123456.pdf, 0000123456_1.pdf, 0000123456_2.pdf for example will not be generated; an error will be generated for this case. This behavior can be changed by editing the PDF.ini file in the directory where the Pregen program is running.

[PDF]
OVERWRITEDOCID=0

OVERWRITEDOCID=0 is the default and will generate an error if PNGDLL.dll finds the same Docid file in the directory. This only occurs for PDF's created for the standard Pregen where the individual PDF name is not specified. This only occurs if the PDF Pregeneration template does not have variables.

If the template does not contain variables, using OVERWRITEDOCID=1 will cause PNGDLL.dll to overwrite the existing PDF.

If an error occurs an error file will be created. The file will be in the directory where the PDF's are located. The name will be the same as the Large PDF with _YYYYMMDDhhnnss.error added. This will allow error information to be available even when logging is turned off.

When splitting the large PDF into individual PDFs, the Large PDF name will be unique instead of reusing the name when PREGENDOCSPLIT is used. The individual document original Large PDF name must be correct. The Large PDF page count must match the individual document page counts. It will verify the Large PDF has been split before starting a new Large PDF.

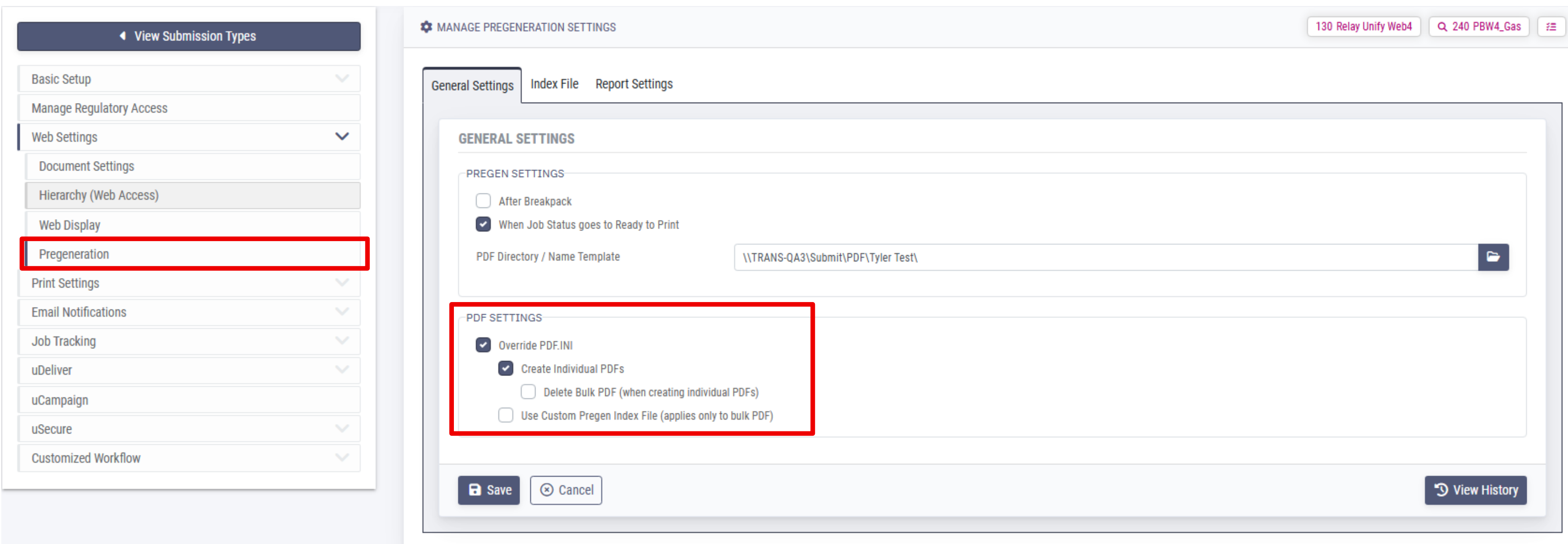
The Pregeneration settings in the PDF.ini can be overridden within submission types. For these settings, the Pregen Index must be disabled or not setup.

To enable these override settings, check **Override PDF.INI** on the web tab within a submission type.

Create Individual PDFs – Controls splitting of the original single PDF into documents with the names provided by the “PDF directory / PDF Name template” field above. If only this setting is checked, the bulk PDF and individual PDFs will be created.

Delete Bulk PDF – If this is checked, it causes the Bulk PDF to be deleted once the individuals are created. Create individual PDFs must be enabled for this setting to be available.

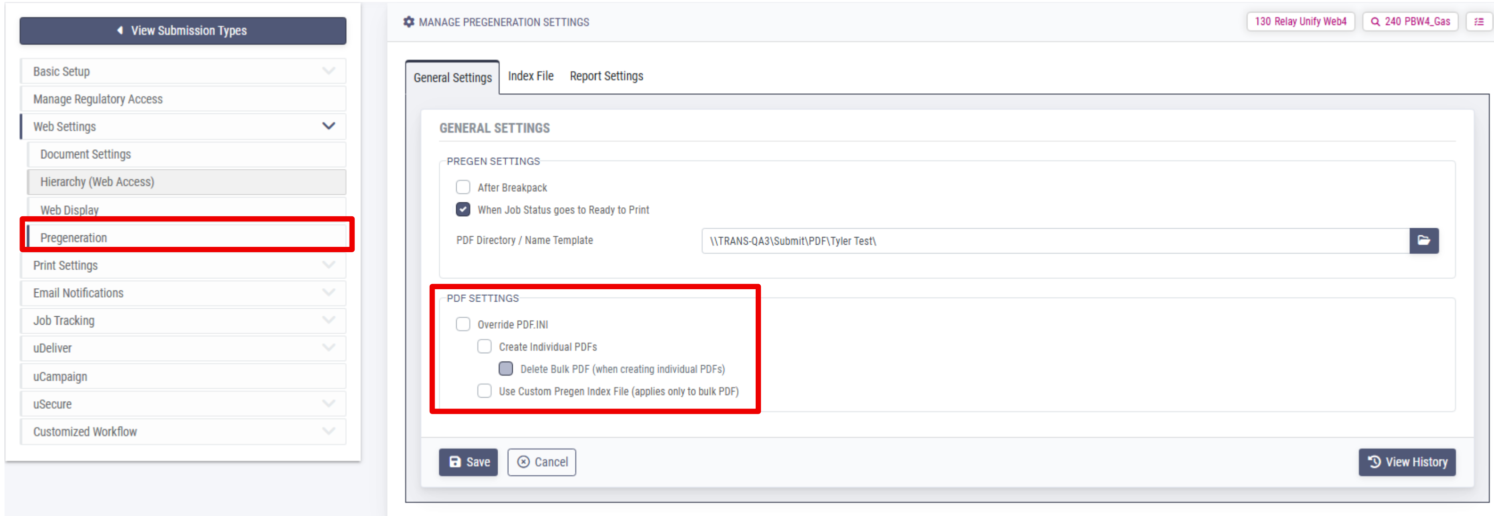
Use Custom Pregen Index File – Uses default Index File.



Pregeneration Index File

There is a custom index file that will be created when the PDFs are pregenerated. When this feature is enabled within a submission type, pregeneration will only generate one PDF containing all documents. The index file will be your guide to finding individual documents within the PDF. Set up a directory for the Pregen PDFs.

Click on Index File Tab.



On the Pregeneration Index Specifications form you can do the following.

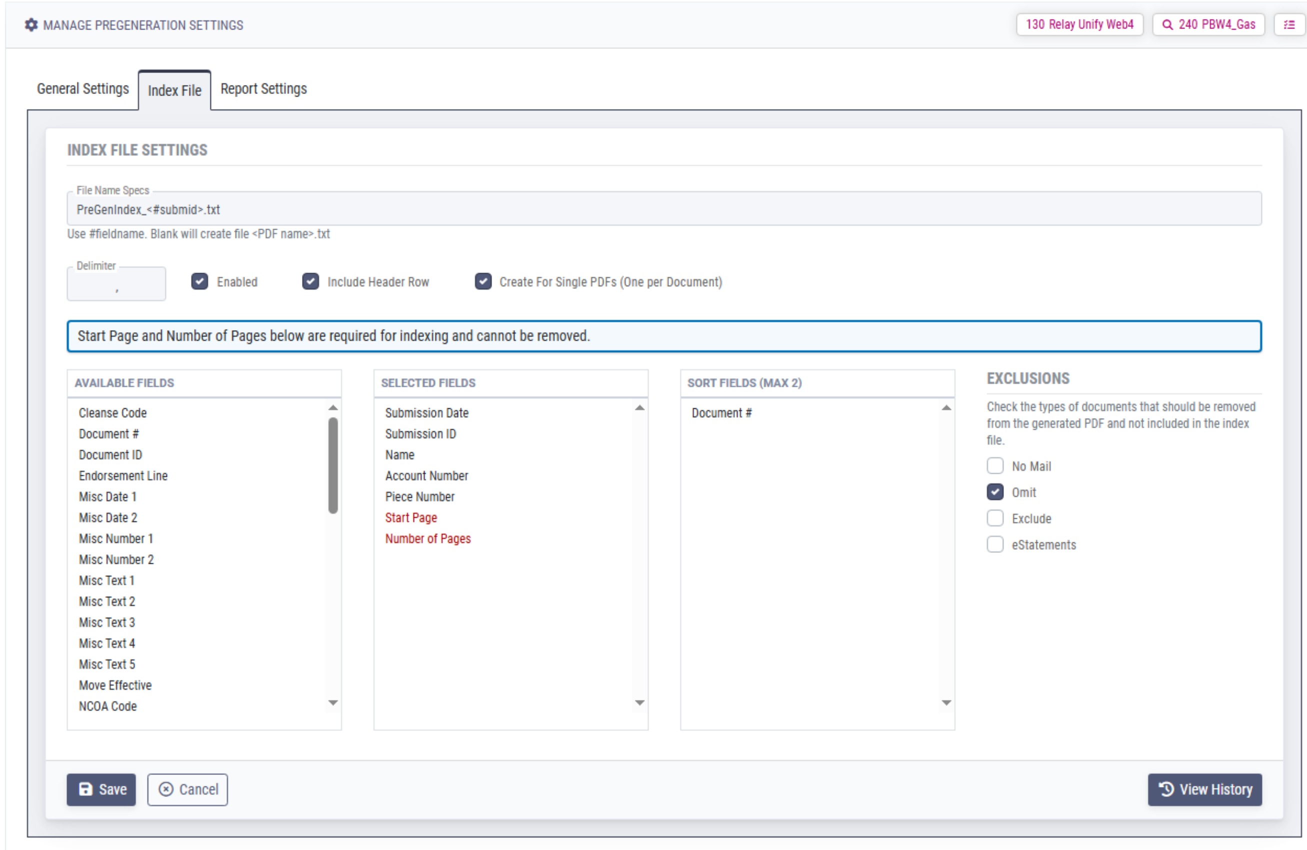
- Enter the File Name Specifications. This could be the name of the file or you can use <#fieldname> to specify variables. The fieldname would be any of the acceptable fields in uCompose.
  Ex: <#sys_subname>_<#submid>.idx.
  If no specification is entered, the index file will use the name of the PDF with a .txt extension.
- Select the delimiter. The index file will be a delimited file.
- Enabled. If this is not checked, the index file will not be created.
- Include Header Row. Check this to include the field names as the first row in the file.
- Create For Single PDF's (One per Document) must be enabled to create an index file if the submission type has been setup to create individual PDFs for pregen. The One per document is noting that one PDF will be created for each document.
  - If this value is checked but the Pregen index file is not enabled, the individual PDFs will be generated but no index file will be created.
  - If this value is not checked but the index file is enabled, there will be one PDF of all documents and an index file.

Tips:

If the name for a PDF has any invalid characters, those will be replaced with an underscore.

If the bulk PDF is created, the documents on the web will be rendered on the fly. If individual PDFs are pregenerated, using the default naming structure, the documents will be rendered from the pregenerated PDFs rather than on the fly.

- Adding fields to the index file.
  - To add a field, select a field on the left side and click and drag to the appropriate column.
  - To remove a field, select a field on the right side and drag back to Available Fields.
  - To move a field to a different position, select a field on the right and drag it to where you want it placed.
  - Fields are saved automatically.
- Adding exclusions. If you want to exclude documents from the output PDF and the index file, check the appropriate boxes.
- If you would like to set a sort order, you can add up to 2 fields for the order from the selected list of fields. Start Page, Number of Pages and PDF File Name cannot be added. To add them select the field from the ones in the selected menu, then drag them to Sort.



Save.

Make sure you have enabled pregeneration and run a submission. When it is time to generate the PDF, a single PDF will be created, and the index file will also be created. The index file will be in the same folder as the PDF.

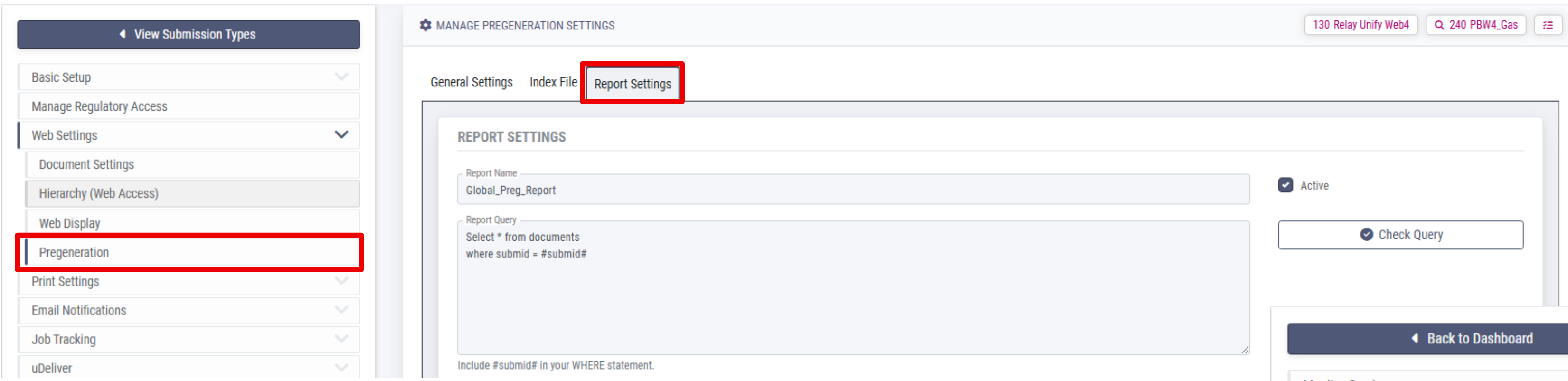
Sample of the index file:

```
Submission Date,Submission ID,Name,Account Number,Piece Number,Start Page,Number of Pages
20260429,8476,Ryan Semanchik,71698,1,1,2
20260429,8476,Tyler Mahurin,777,2,3,1
20260429,8476,Alex Gregory,71701,3,4,1
20260429,8476,Redia Lubben,1010123456789,4,5,2
20260429,8476,Chris Lindsay,123454321,5,7,1
20260429,8476,Scott Tripp,269275,6,8,1
20260429,8476,Maureen Melycher,29837-004339,7,9,1
20260429,8476,Bart Haag,71705,8,10,1
```

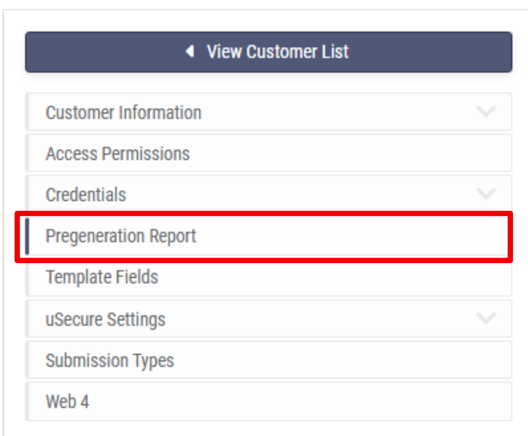
Pregen Report Configuration

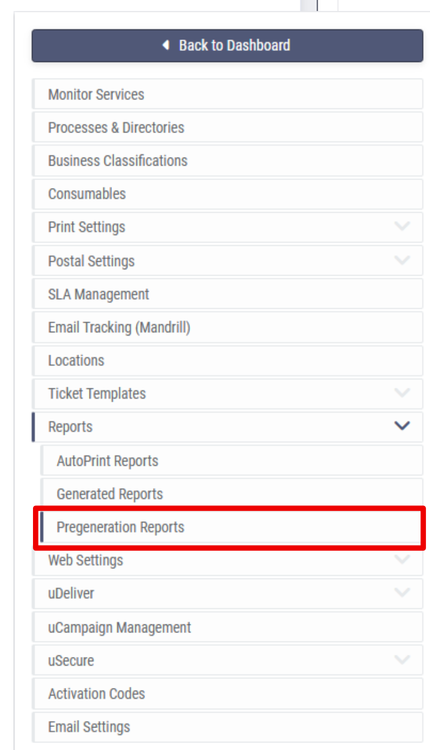
There are 3 places it can be configured, globally, by customer or by submission type. The generation of the report will always go from lowest level to highest. It will look at the submission type first for the configuration. If one has not been set up, it will look at the customer. If one has not been set up, it will look at the global level. The lowest active level is always used.

The Submission type level can be set up under the Pregeneration Tab under Web & Payment Settings Dropdown, then Report Settings Tab at the top.



The client level can be setup under the Pregeneration Report Tab once the client has been selected in the list of clients from Manage Clients on the uSetup Dashboard.





The global level can be set up under Global Settings. Select Pregeneration Reports Tab under the Reports Dropdown.

The setup process works the same for the global, customer and submission type level.

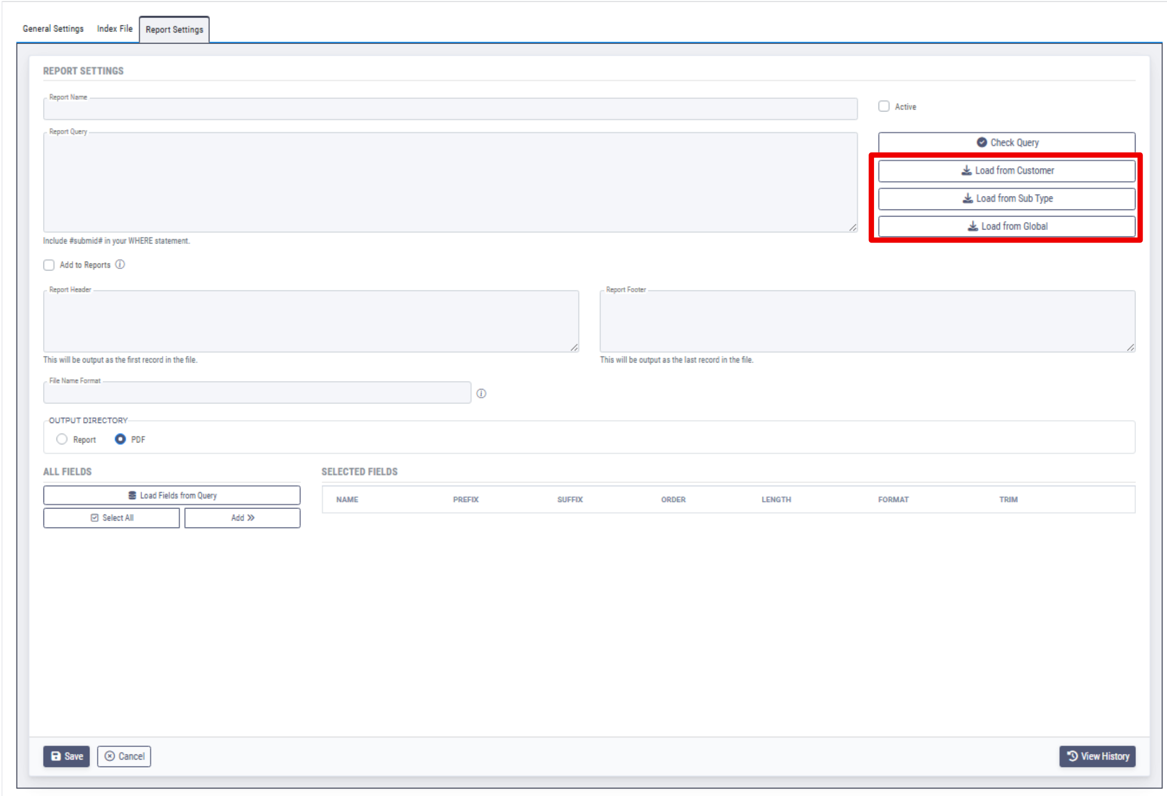
Previously setup Pregeneration Report configurations can be loaded from other submission types, customers, or global.

Report Name - Enter a name for the report.

Active - Check to enable this level.

Report Query - Enter the report query. This will provide the fields for the report. The query **MUST** contain submid = #submid#. #submid# will be replaced by the submission id. You should test the query by clicking on the Check Query button. This will verify if the query is ok.

Click the Check Query button to preview the report query results:



Add To Reports - Check this if you would like the pregeneration report to be available in uControl for viewing/printing.

Header – Enter any report header information. This will be the first line/lines of the report.

Footer – Enter any report footer information. This will be the last line/lines of the report.

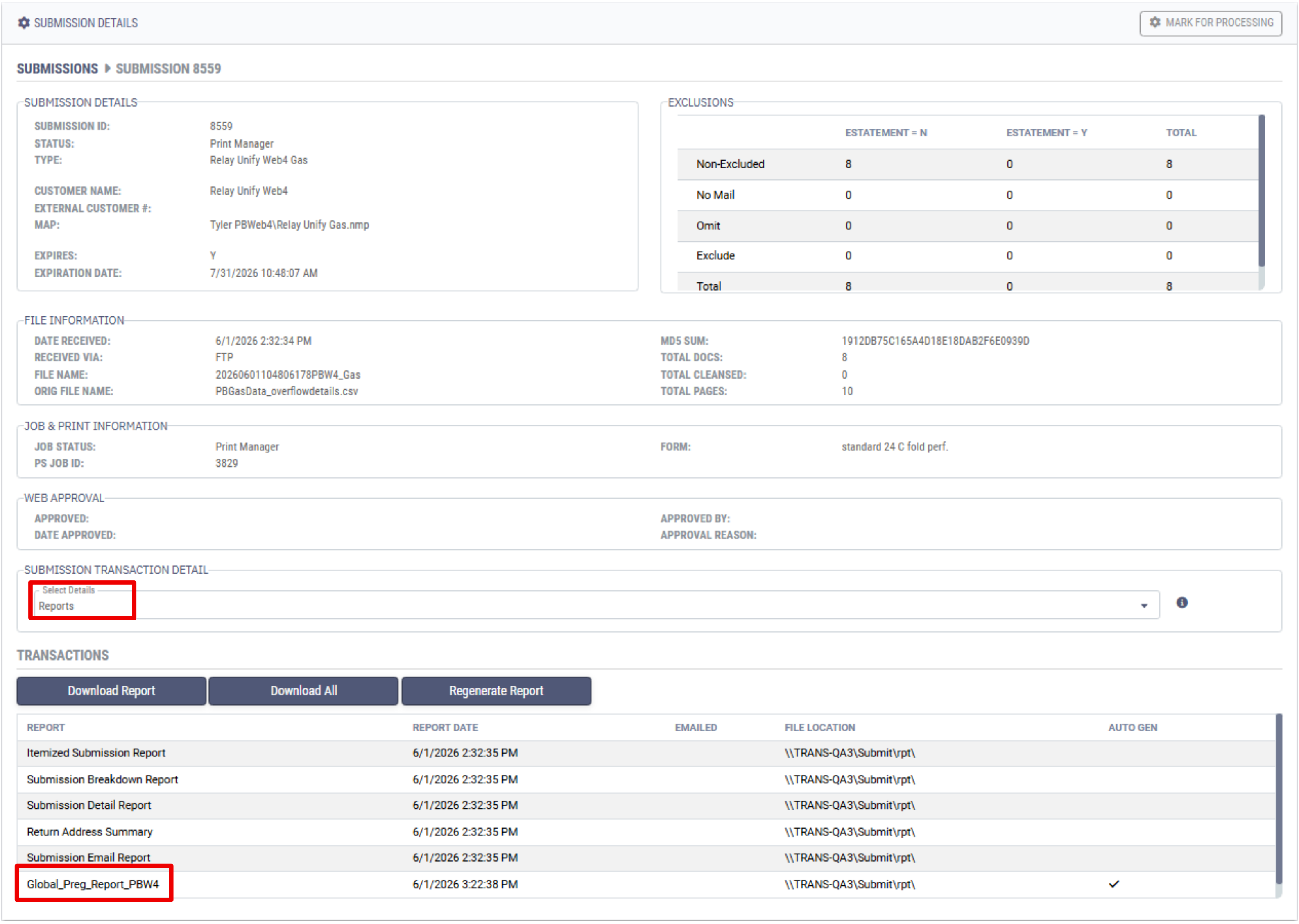
File Name Format – Enter the format for naming the report. It must contain %d or %.Xd where X is the number of zeros to pad. Example – mysubmission_%d.txt would name the report mysubmission_123.txt for submission id 123.

Output Directory – Choose Report or PDF.

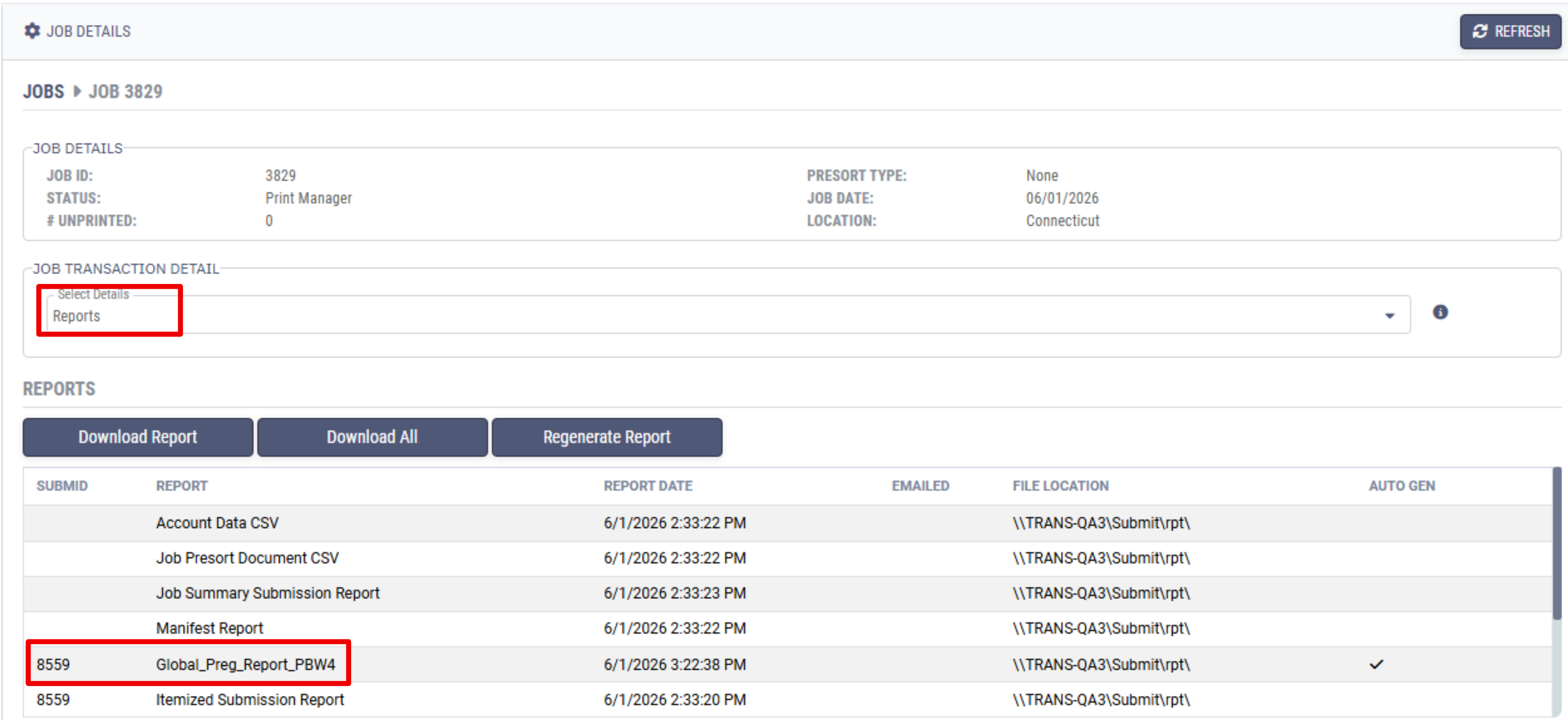
Save your settings. Once saved, the **Details** button will appear above the Check Query button. Details must be included.

If Add To Reports was checked, you can access the pregeneration report from uControl. The report will not be accessible in uControl if that setting was unchecked.

In uControl, right-click on a submission. Go to the Reports Dropdown Tab.

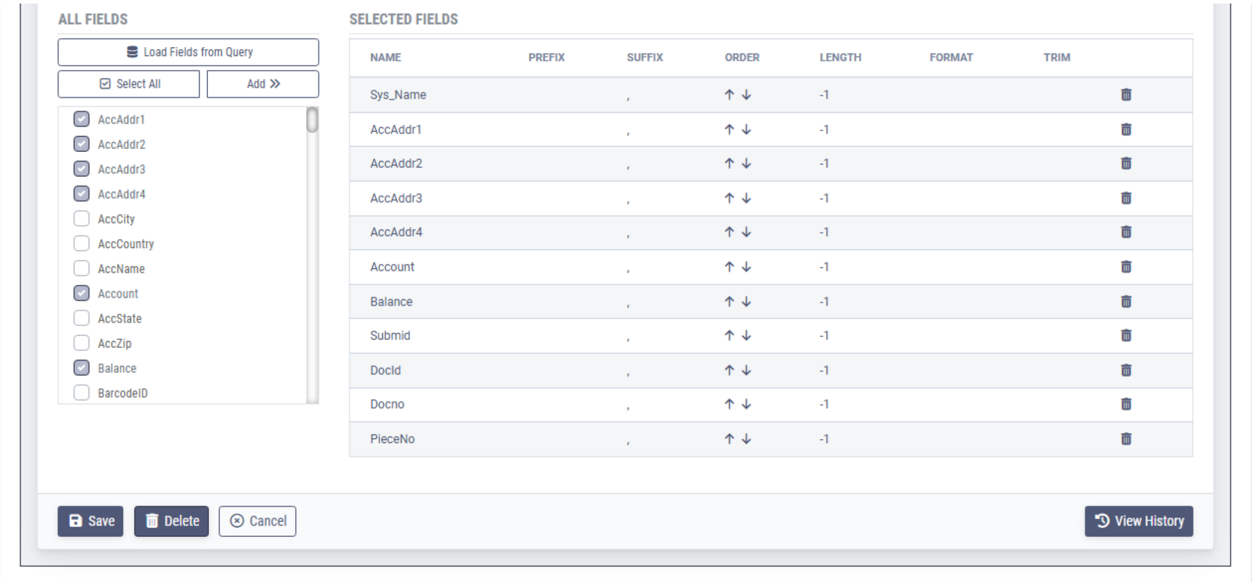


In uControl, go to the Jobs Tab and select the desired job, then right-click and View Details.



Report Details

To add fields to the report, click on the **Load Fields from Query** button. This will load a list of all fields returned by the query into the list box on the left.



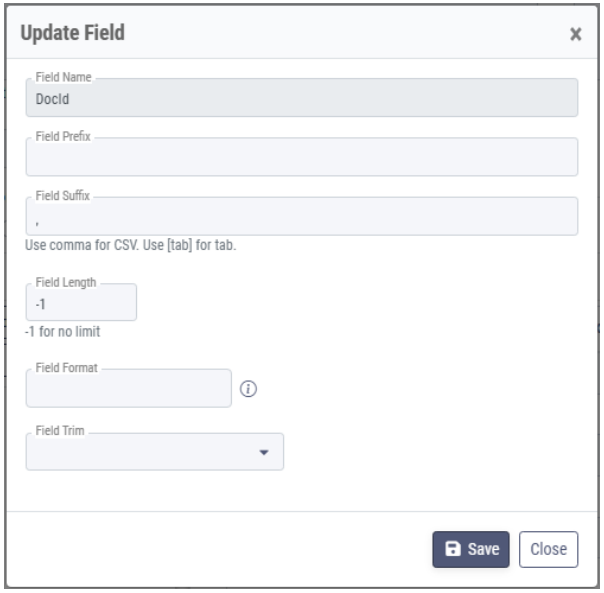
Check the fields you want to include on the report. You can click Select All to select all fields.

Once you have selected the fields you want, click **Add >>**.

All selected fields will then be available to the report. You can begin modifying specific details, formatting, etc. to the individual fields.

Field Prefix – Enter any prefix that will be placed before the field value. If you want to put quotes around the data, put " in the field. If you would like the same prefix on all fields, you will have to enter them separately.

Order – Set the order the field will appear in the report using the up and down arrows.



Field Suffix – Enter any suffix that will be placed after the field value. If you are creating a delimited file, include the delimiter. If you want to tab delimit, put in [tab]. If you would like the same suffix on all fields, you will have to enter them separately.

Field Length – Set the length of the field. If you want the full length, put in -1.

Field Format – Enter string formatting for the field. This uses Delphi string formatting commands. To see a list of these commands, click on the tip button. (See below)

Field Trim – Select from the list if you want to trim spaces from the data. The values are blank (no trimming), Left, Right and Both.

Save.

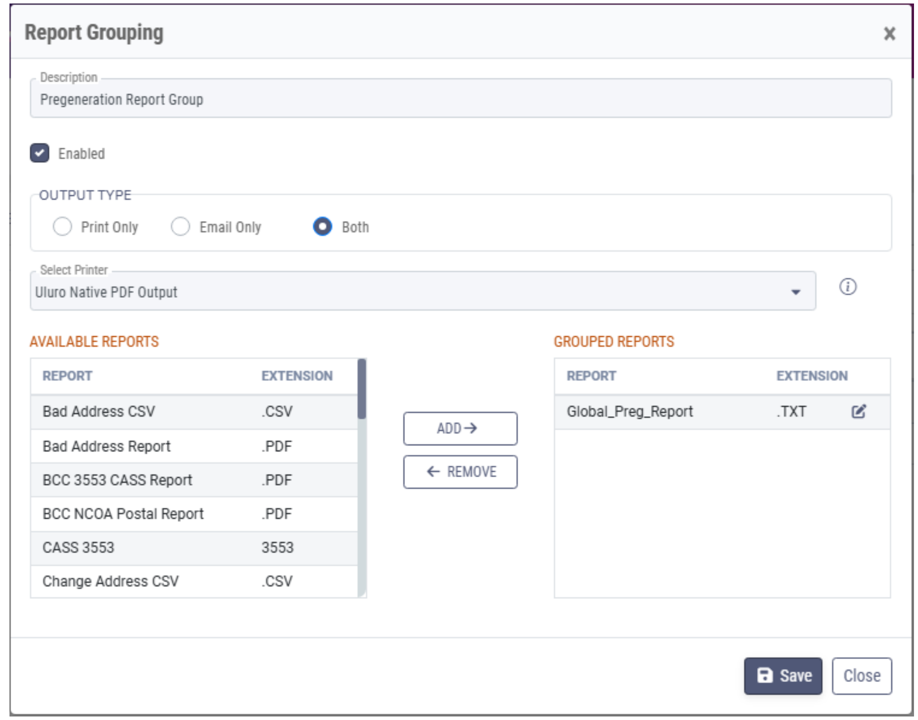
Printing and Emailing Pregeneration Reports

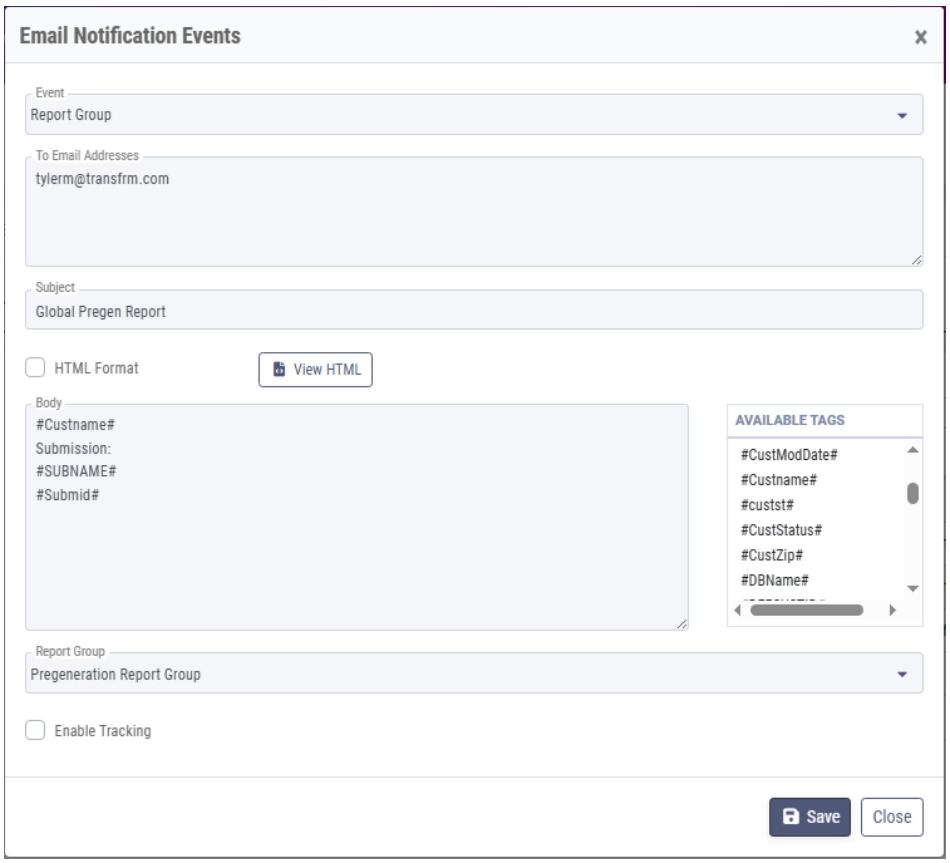
Pregeneration Reports can be part of a report group and printed/emailed individually or with other reports.

The submission and customer level pregeneration reports will be listed within the report group.

Create a report group with the desired settings. Add the pregeneration report to the list of grouped reports.

Enable that report group within an email event. This can be done within the Email Notifications Tab of a submission type.

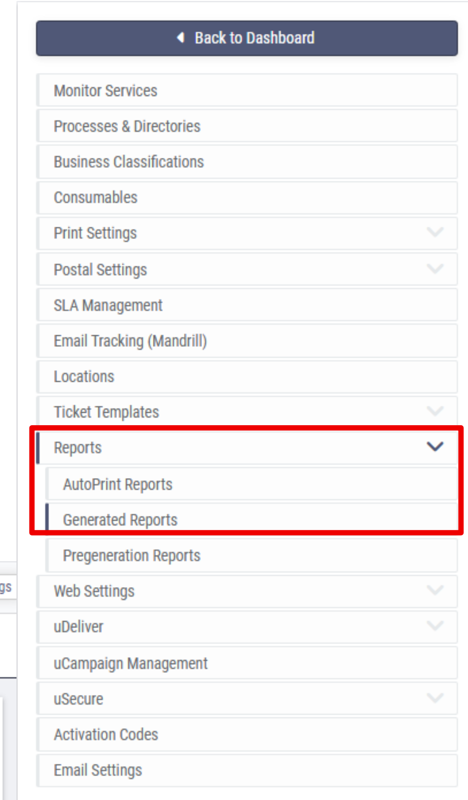




Reports

The following reports are also available in the Global Settings section > Reports Dropdown Tab > Generated Reports Tab; and for Multi-Channel, navigate to the uDeliver Dropdown Tab and click on Reports:

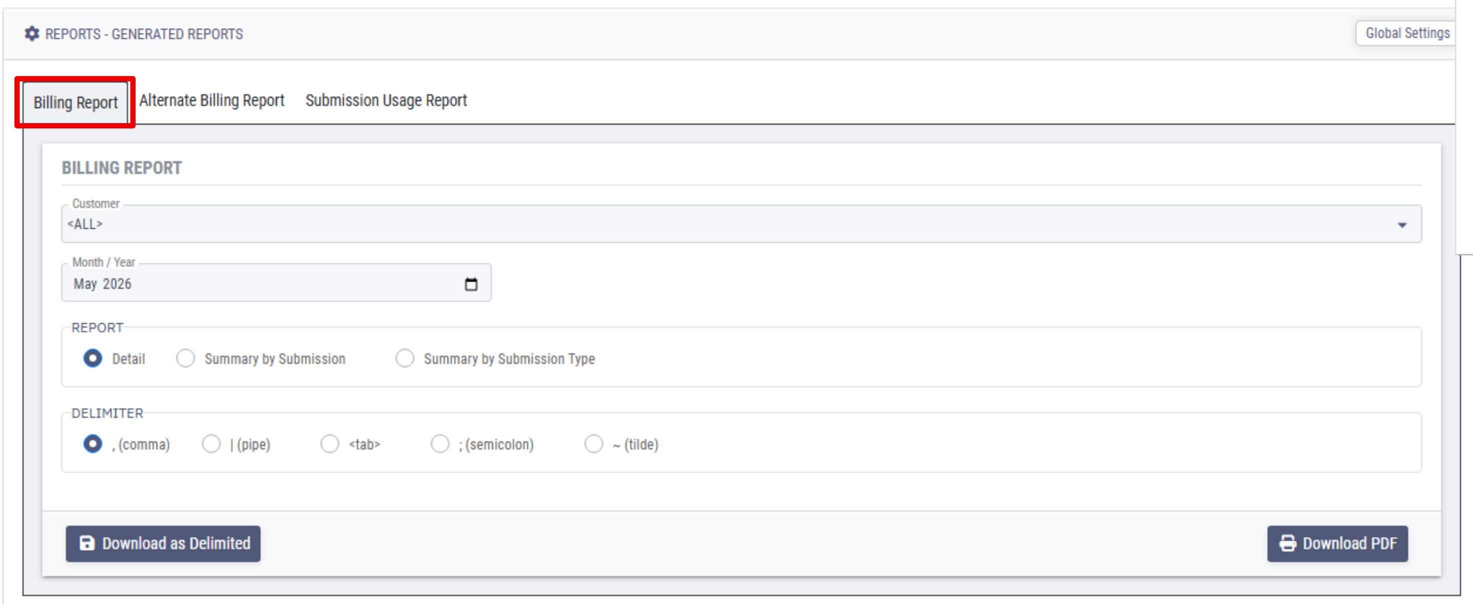
- Billing Report
- Alternate Billing Report
- Submission Usage Report
- Multi-Channel Delivery Report



Billing Report

The billing report can be generated for one customer or for all customers for a range of dates.

Enter the desired parameters and file name, then click Download PDF to quickly view the report or Download as Delimited to save the file to the location specified.



All Report types contain:

Cust ID	Sub Type ID	Number Enrolled	Month Active
Customer Name	Sub Description	Number Docs	Year Active

Detail Report also contains:

Submission ID   Sub Date

Submission report also contains:

Submission ID   Sub Date

Detail Report:

Billing Detail Report

Reporting Period: 5 / 2026

Cust Id	Name	Sub Type ID	Description	Submission	Sub Date	Account #	Enrolled
130	Relay Unify Web4	292	Demo 3526			4773292	Y
130	Relay Unify Web4	292	Demo 3526			4839631	Y
130	Relay Unify Web4	261	Demo 8-13			550470108000	Y
130	Relay Unify Web4	241	Pitney Bowes Mill Rate			71698	Y
130	Relay Unify Web4	280	Relay Unify Healthcare Demo			369369369-00	Y
130	Relay Unify Web4	240	Relay Unify Web4 Gas	8477	5/1/2026 12:00:00 AM	1010123456789	Y
130	Relay Unify Web4	240	Relay Unify Web4 Gas	8477	5/1/2026 12:00:00 AM	269275	Y
130	Relay Unify Web4	240	Relay Unify Web4 Gas	8477	5/1/2026 12:00:00 AM	71698	Y
130	Relay Unify Web4	240	Relay Unify Web4 Gas	8477	5/1/2026 12:00:00 AM	71705	N
130	Relay Unify Web4	240	Relay Unify Web4 Gas	8478	5/1/2026 12:00:00 AM	1010123456789	Y
130	Relay Unify Web4	240	Relay Unify Web4 Gas	8478	5/1/2026 12:00:00 AM	269275	Y
130	Relay Unify Web4	240	Relay Unify Web4 Gas	8478	5/1/2026 12:00:00 AM	71698	Y
130	Relay Unify Web4	240	Relay Unify Web4 Gas	8478	5/1/2026 12:00:00 AM	71705	N
130	Relay Unify Web4	240	Relay Unify Web4 Gas	8479	5/1/2026 12:00:00 AM	1010123456789	Y
130	Relay Unify Web4	240	Relay Unify Web4 Gas	8479	5/1/2026 12:00:00 AM	269275	Y
130	Relay Unify Web4	240	Relay Unify Web4 Gas	8479	5/1/2026 12:00:00 AM	71698	Y
130	Relay Unify Web4	240	Relay Unify Web4 Gas	8479	5/1/2026 12:00:00 AM	71705	N
130	Relay Unify Web4	240	Relay Unify Web4 Gas	8480	5/1/2026 12:00:00	1010123456789	Y

The Summary by Submisison:

Billing Summary Report by Submission

Reporting Period: 5 / 2026

Cust Id	Name	Sub Type ID	Description	Submission	Sub Date	# Documents	# Enrolled
130	Relay Unify We	261	Demo 8-13			0	2
130	Relay Unify We	280	Relay Unify Healthcare Demo			0	2
130	Relay Unify We	240	Relay Unify Web4 Gas			0	5
130	Relay Unify We	250	RU Web4 Hospital uBridge			0	4
130	Relay Unify We	242	Relay Unify Secure			0	1
130	Relay Unify We	241	Pitney Bowes Mill Rate			0	2
130	Relay Unify We	292	Demo 3526			0	4
130	Relay Unify We	288	Demo 32626			0	1

The Summary by Submisison Type:

Billing Summary Report by Submission Type

Reporting Period: 5 / 2026

Cust Id	Name	Sub Type ID	Description	# Documents	# Enrolled
130	Relay Unify Web4	261	Demo 8-13	0	0
130	Relay Unify Web4	280	Relay Unify Healthcare Demo	0	0
130	Relay Unify Web4	240	Relay Unify Web4 Gas	0	0
130	Relay Unify Web4	250	RU Web4 Hospital uBridge	0	0
130	Relay Unify Web4	242	Relay Unify Secure	0	0
130	Relay Unify Web4	241	Pitney Bowes Mill Rate	0	0
130	Relay Unify Web4	292	Demo 3526	0	0
130	Relay Unify Web4	288	Demo 32626	0	0

Alternate Billing Report

The Alternate Billing report can be generated for one customer or for all customers for a range of dates.

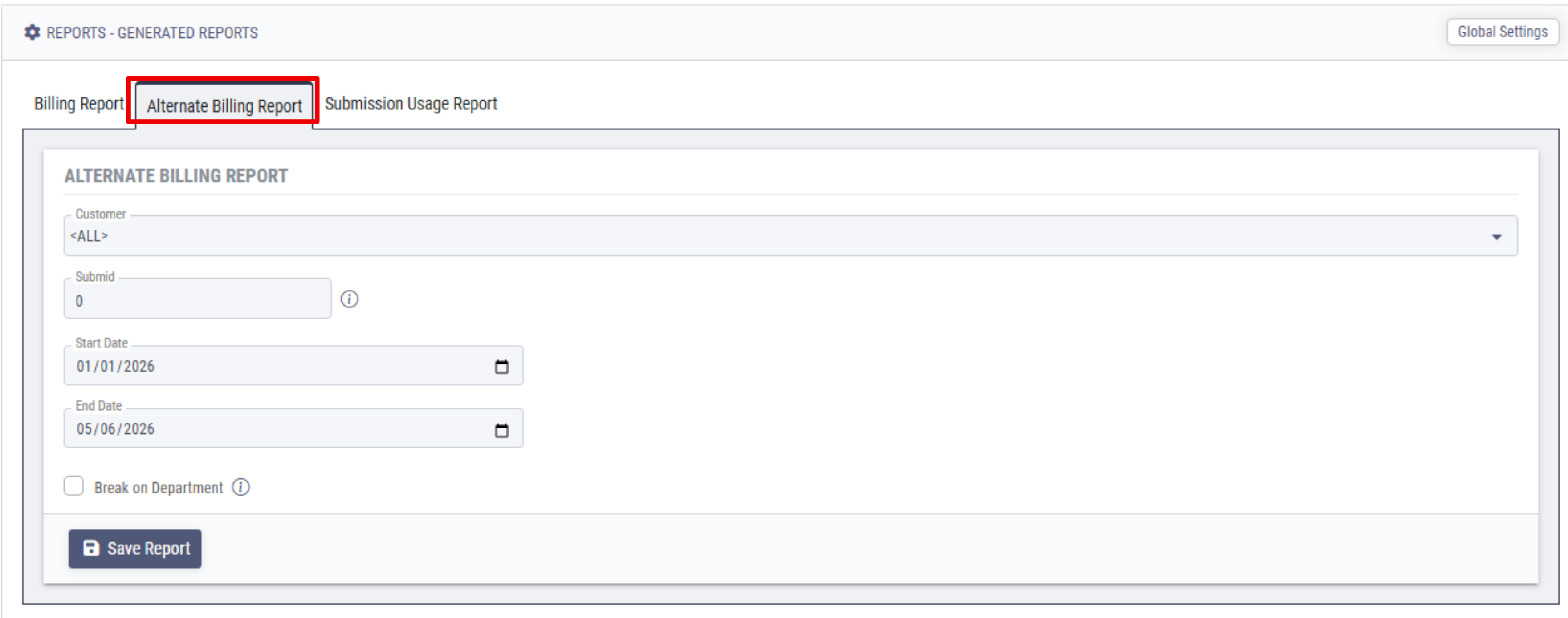
Enter the submission ID or the date range. If using the submisison ID, the submisison must be in at least Print Manager status or already printed.

Enter the desired parameters and file name, then click Save Report to save the file to the location specified.

Select Break on Department to break for each value of V_DET_1_DEPT_NAME, a variable created in the map.

Select Bill to First Department ONLY if the department break will be using only the first department in the details. For this setting, Break on Department must also be checked.

Enter a file name, then click Save Report to save the file to the location specified.



The report contains the following fields:

Output Type
SubmissionID
JobID
PrintJobID
Print Config. Description
CustomerName
CustID
Submission Type ID
JobDate
JobTime
FormName
InputFileName
TotalSheets
FirstSheets
SubSheets
TotalEInsertSheets
TotalImages
FirstImages
SubImages
EInsertImages
FrontImages
BackImages
EInsertFrontImages
EInsertBackImages
TotalSuppliedInserts
Insert1
Insert2
Insert3
Insert4
Insert5
Insert6
UnitsMailed
Under1oz
Between1and2oz
Between2and3oz
Greater3oz
ForeignPackages
UnqualifiedDocs
NCOAProcessed
NCOAMoved
CostCenter
RipCount

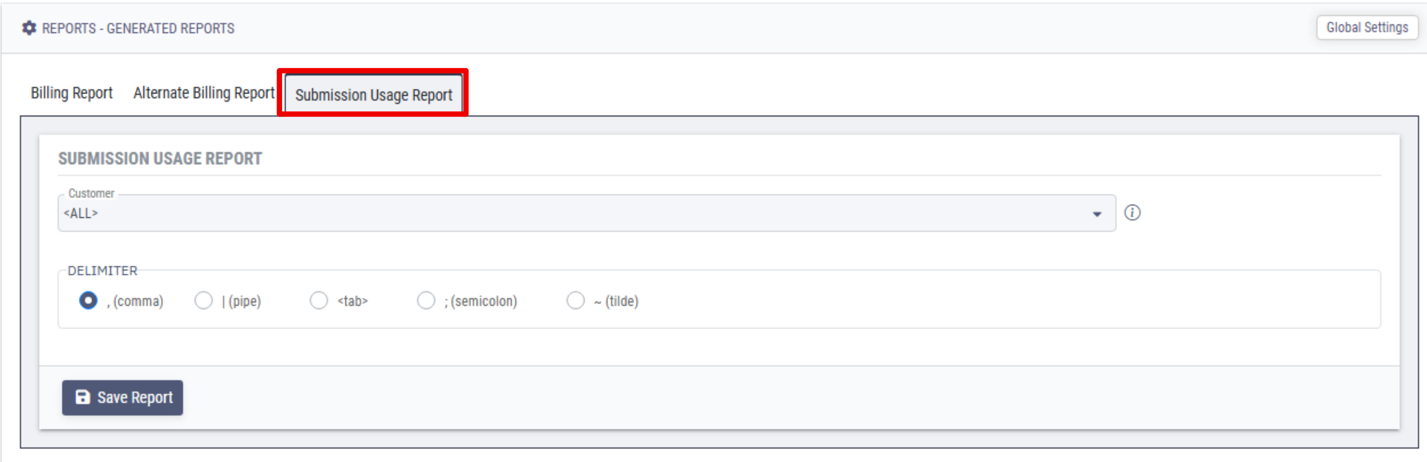
These are the same fields in the Submission Billing report.


```
"Output Type","SubmissionID","JobID","PrintJobID","Reprint","Print Config. Description","CustomerName","CustId","Submission Type ID","JobDate","JobTime","FormName","InputFilename","TotalSheets","FirstSheets","SubSheets","TotalEIns
"Omit","8436","3726","","","","Relay Unify Web4","130","288","03/26/2026","09:55:30","standard 24 Z fold perf.","NH-SAAIA-02032025-(5 Certs)-570887.pdf","2","1","1","0","4","1","3","0","2","2","0","0","0","0","0","0","0","0","0","
"Omit","8438","3728","","","","Relay Unify Web4","130","288","03/26/2026","10:14:00","standard 24 Z fold perf.","NH-SAAIA-02032025-(5 Certs)-570887 Edited-Bad Address.pdf","2","1","1","0","4","1","3","0","2","2","0","0","0","0","0
"Print","8431","3725","2363","N","","Relay Unify Web4","130","241","03/25/2026","14:49:57","standard 24 C fold perf.","Normal_1_of_1.pdf","32","32","0","0","32","32","0","0","32","0","0","0","0","0","0","0","0","0","0","32","32","
"Print","8432","3725","2363","N","","Relay Unify Web4","130","241","03/25/2026","14:49:57","standard 24 C fold perf.","Normal_1_of_1.pdf","32","32","0","0","32","32","0","0","32","0","0","0","0","0","0","0","0","0","0","32","32","
"Print","8433","3725","2363","N","","Relay Unify Web4","130","241","03/25/2026","14:49:57","standard 24 C fold perf.","Normal_1_of_1.pdf","32","32","0","0","32","32","0","0","32","0","0","0","0","0","0","0","0","0","0","32","32","
"Print","8434","3723","2361","N","All Docs PDF","Relay Unify Web4","130","280","03/25/2026","14:40:00","standard 24 C fold perf.","PB_Healthcare_Letter_PDF_data.PDF","20","10","10","0","20","10","10","0","20","0","0","0","0","0","
"Print","8435","3724","2362","N","All Docs PDF","Relay Unify Web4","130","240","03/25/2026","14:45:00","standard 24 C fold perf.","PBGasData_overflowdetails.csv","8","6","2","0","8","6","2","0","8","0","0","0","0","0","0","0","0",
```

Submission Usage Report

The Submission Usage Report can be generated for one customer or for all customers.

Only active submissions will show up on the Submission Usage Report. Only Submissions that aren't in Cancelled, Deleted, or Error Status will be counted.



Enter the desired parameters and file name, then click Save Report to save the file to the location specified.

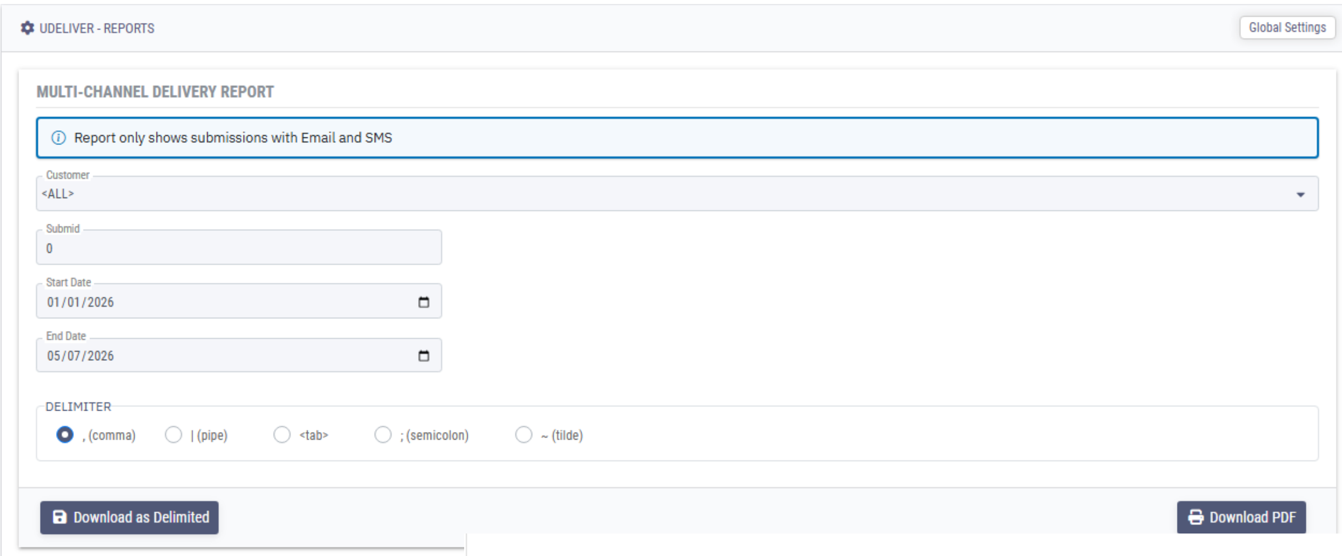
CustomerID	CustomerName	SubmissionTypeID	SubmissionType	SubmissionDescription	NumberOfSubmissions	LastUseDate
130	Relay Unify Web4	265	ERR	John Map Test	1	3/26/2026
130	Relay Unify Web4	240	PBW4_Gas	Relay Unify Web4 Gas	22	5/4/2026
130	Relay Unify Web4	280	RU_Health	Relay Unify Healthcare Demo	1	3/25/2026
130	Relay Unify Web4	250	PBW4_Hosp	RU Web4 Hospital uBridge	3	4/23/2026
130	Relay Unify Web4	241	PB_Mill	Pitney Bowes Mill Rate	4	3/25/2026
130	Relay Unify Web4	267	PB_MOD	MOD Test Map	0	
130	Relay Unify Web4	242	RU_Secure	Relay Unify Secure	0	
130	Relay Unify Web4	293	TrackMM	Track My Mail	16	5/6/2026

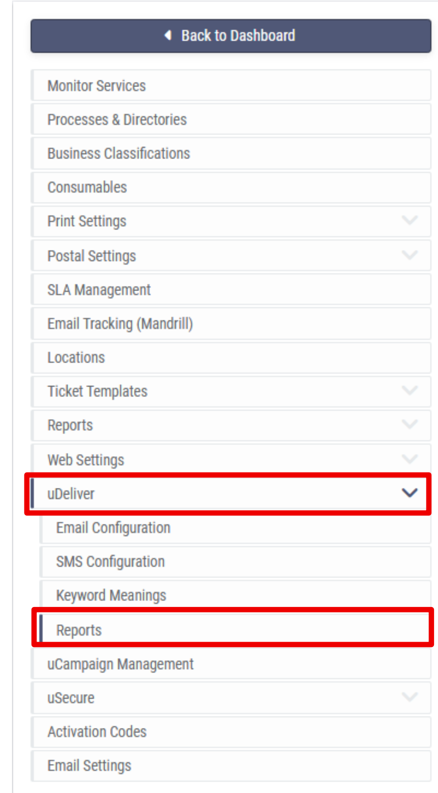
Multi-Channel Delivery Report

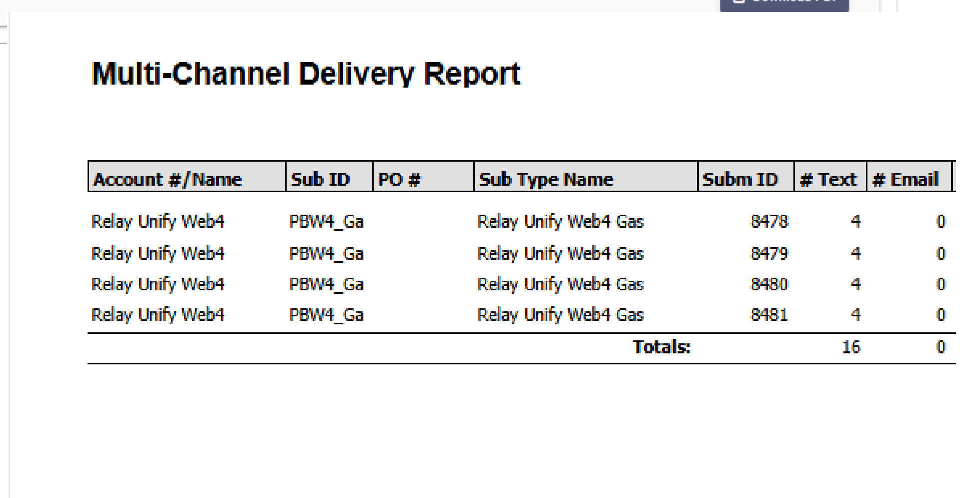
The Multi-Channel Delivery report can be generated for one submission type, one customer, or for all customers for a range of dates.

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.







Multi-Channel Delivery Report

Account #/Name	Sub ID	PO #	Sub Type Name	Subm ID	# Text	# Email
Relay Unify Web4	PBW4_Ga		Relay Unify Web4 Gas	8478	4	0
Relay Unify Web4	PBW4_Ga		Relay Unify Web4 Gas	8479	4	0
Relay Unify Web4	PBW4_Ga		Relay Unify Web4 Gas	8480	4	0
Relay Unify Web4	PBW4_Ga		Relay Unify Web4 Gas	8481	4	0
			Totals:		16	0

Admin Home Page – View and Print Reports

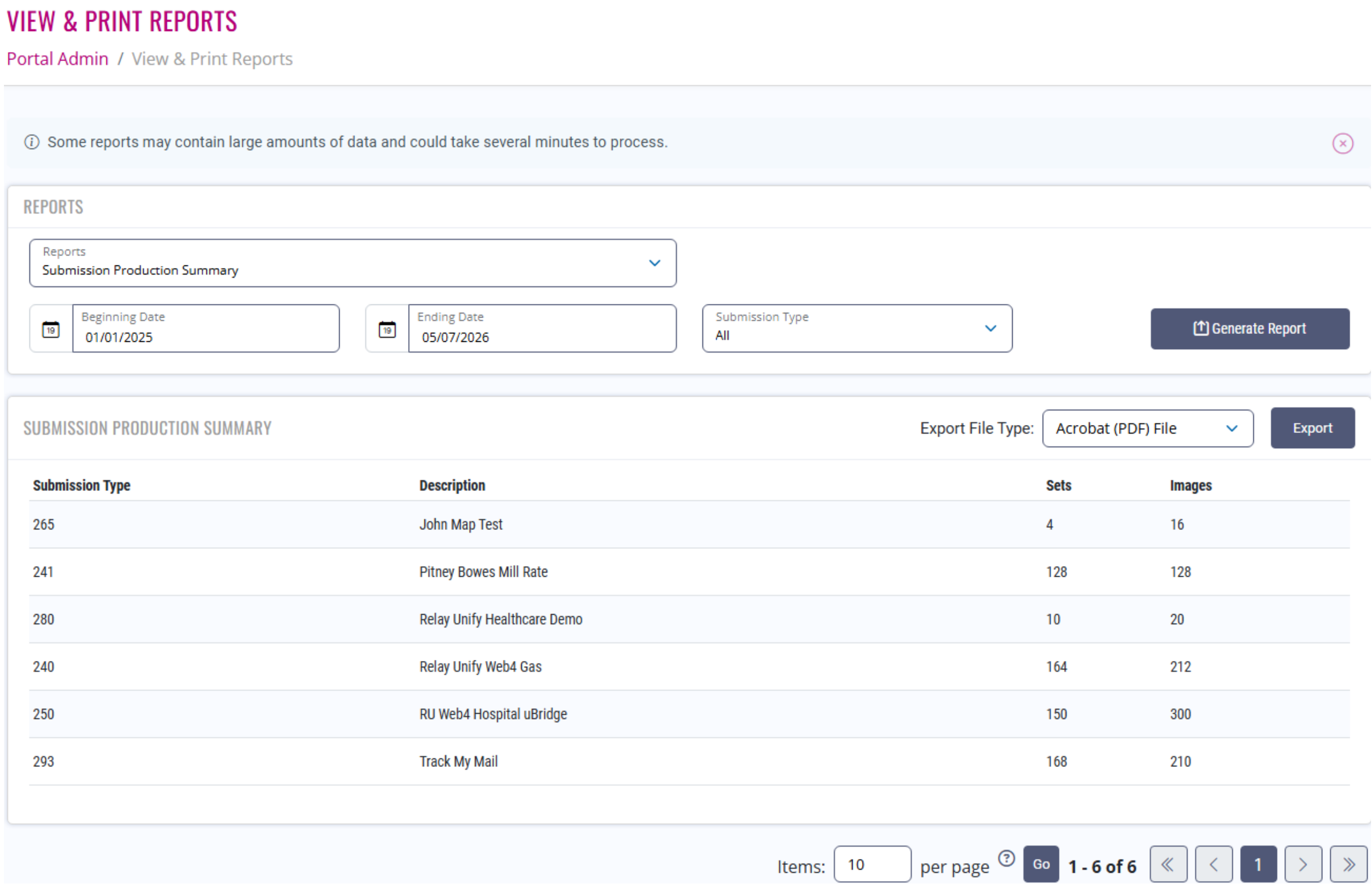
Reports Available:

- Submission Production Summary
- Submission Production Detail Summary
- Multi-Channel Delivery
- End User Enrollment
- Disclaimer Non-Acceptance
- Revert Report
- Billing Report Detail
- Billing Summary Sub
- Billing Summary SubType

Select the Report from the dropdown list. Enter the dates for the report to cover. Once generated, the report can be exported or saved.

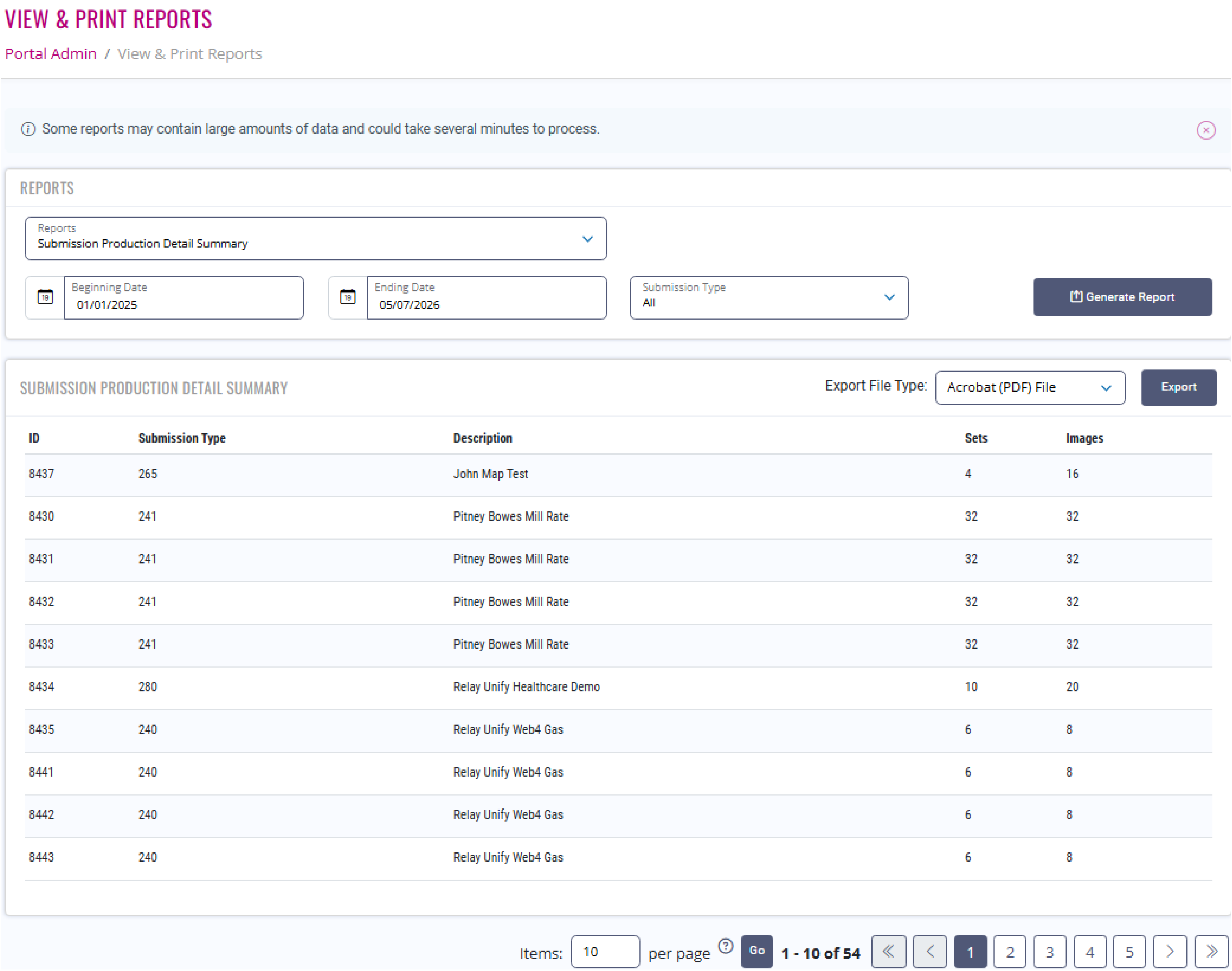
Samples:

Submission Production Summary

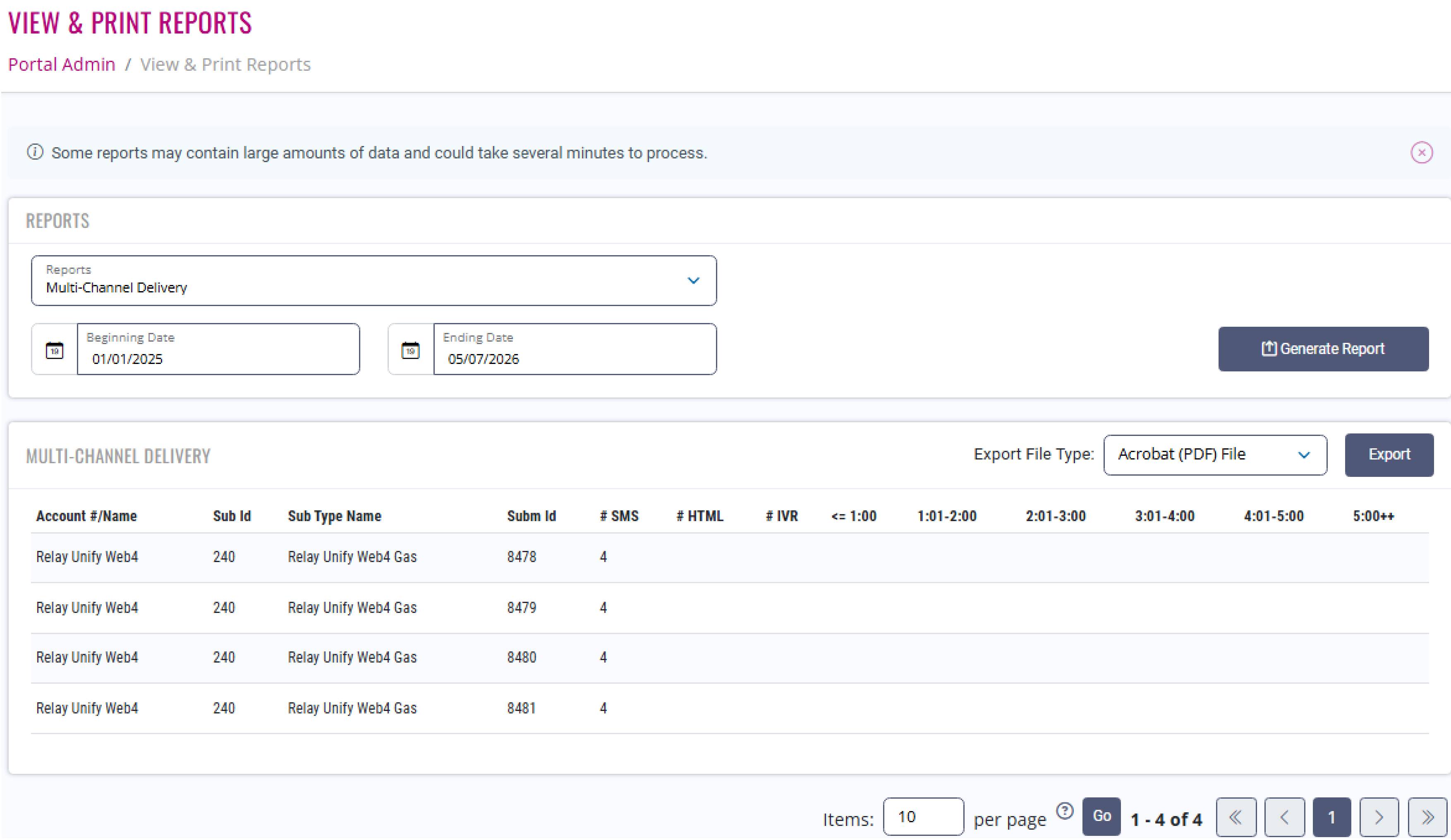


Submission Type	Description	Sets	Images
265	John Map Test	4	16
241	Pitney Bowes Mill Rate	128	128
280	Relay Unify Healthcare Demo	10	20
240	Relay Unify Web4 Gas	164	212
250	RU Web4 Hospital uBridge	150	300
293	Track My Mail	168	210

Submission Production Detail Summary



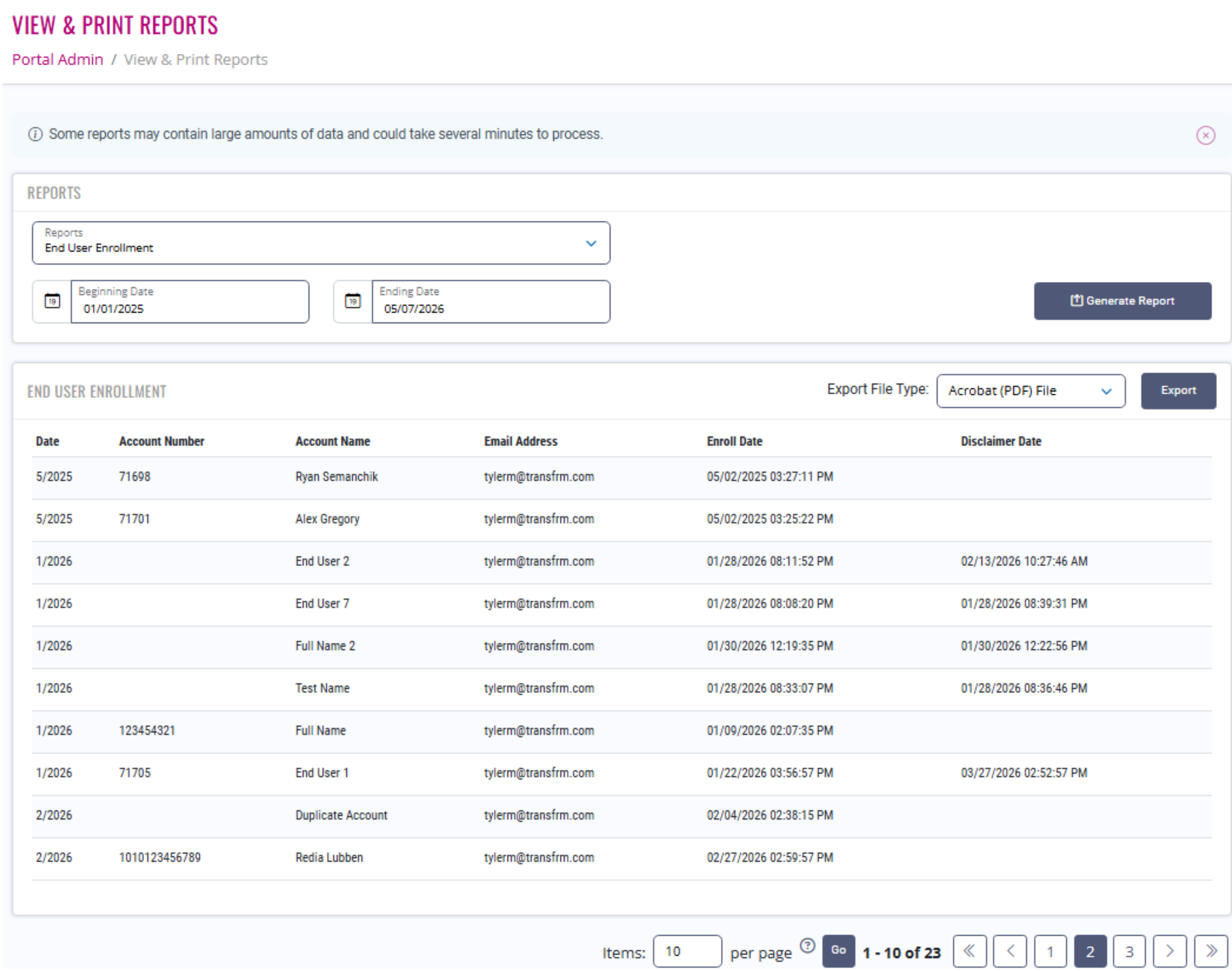
Multi-Channel Delivery



End User Enrollment

The user selects the beginning and ending dates from the calendar select.

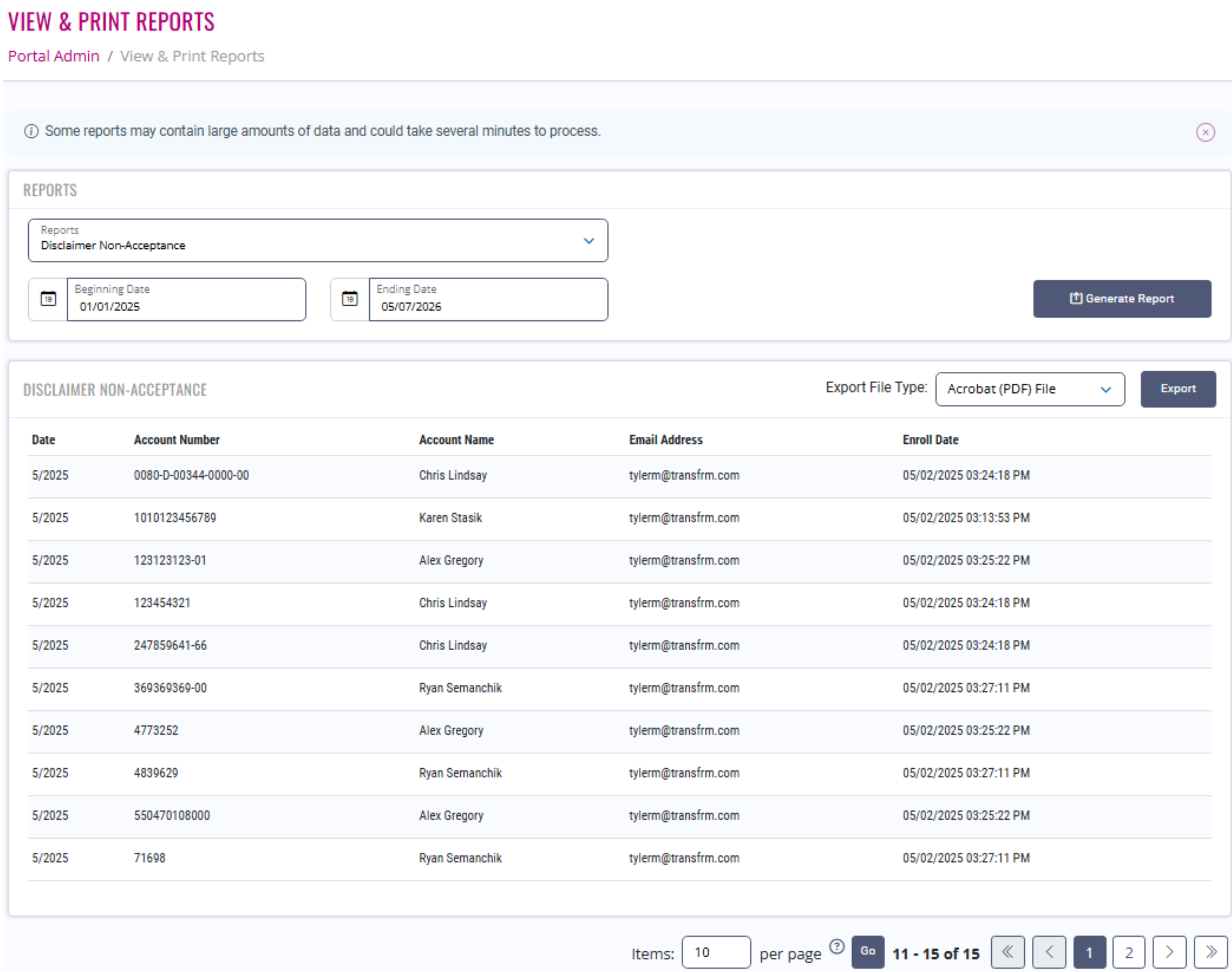
This report shows all accounts enrolled in the web for a specific date range.



Disclaimer Non-Acceptance

The user selects the beginning and ending dates from the calendar select.

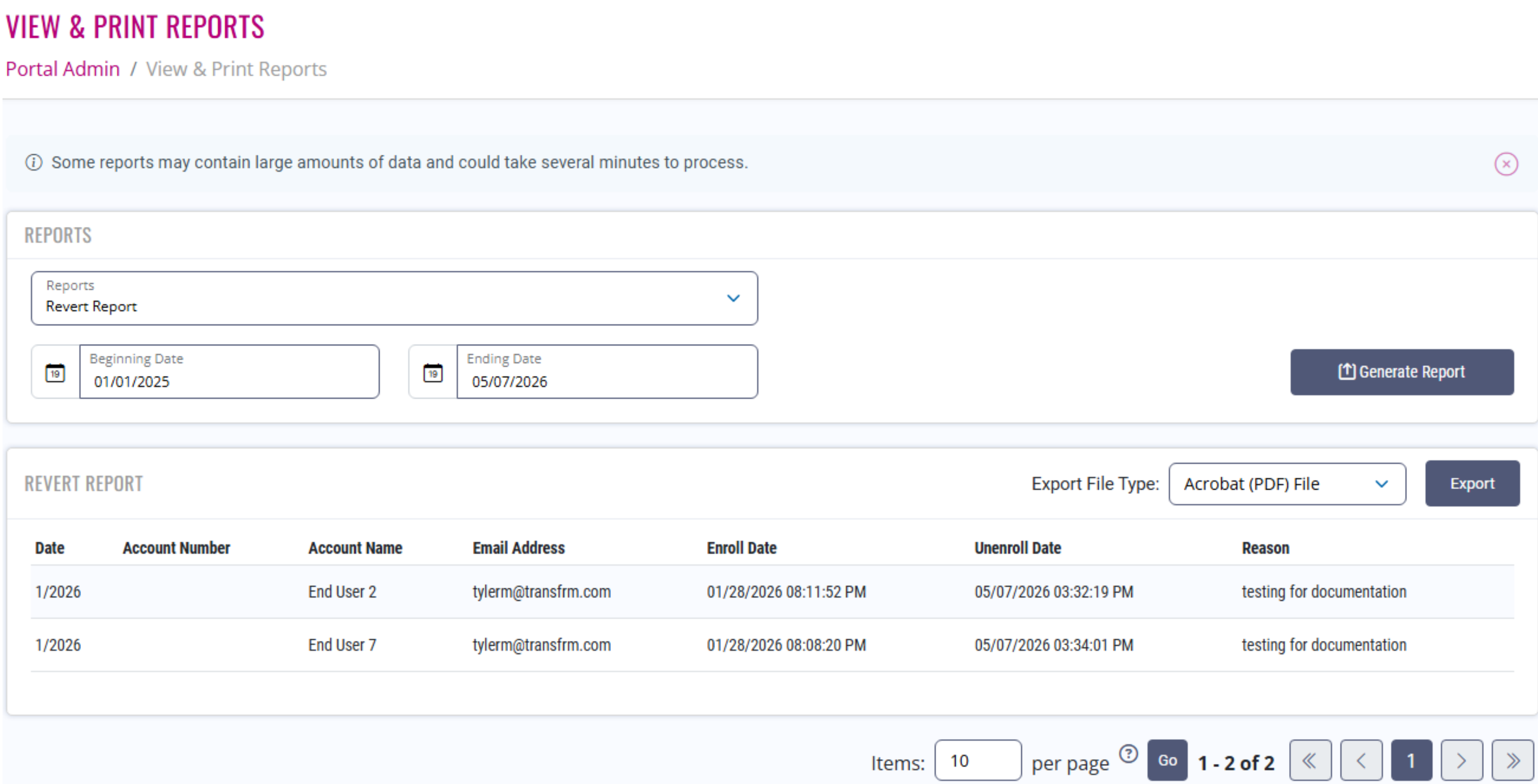
This report shows users who enrolled but did not accept the disclosure.



Revert Report

The user selects the beginning and ending dates from the calendar select.

This report shows users who have un-enrolled from the web.



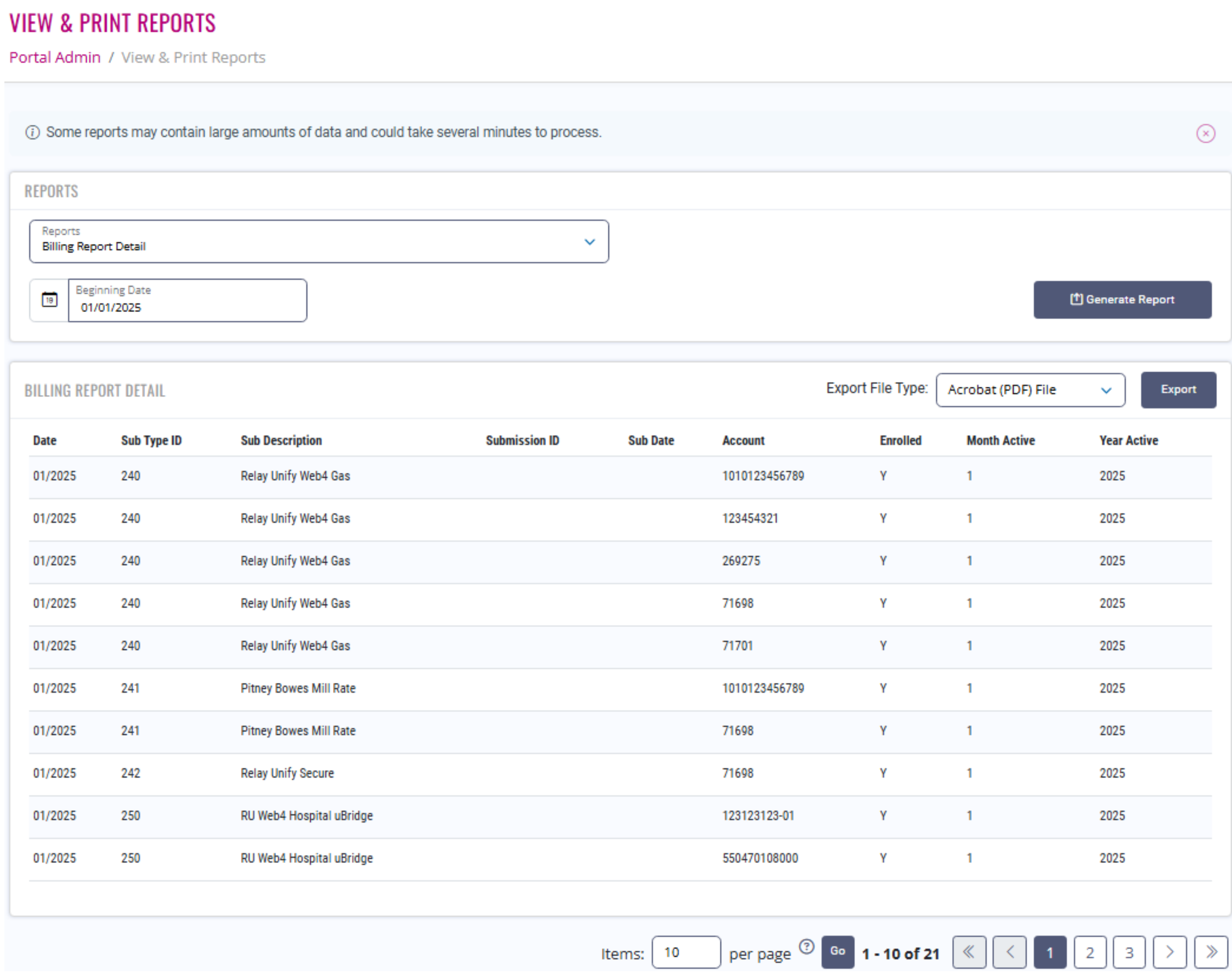
Billing Report Detail

The user selects the report month and year.

The report has 3 options, detail, summary by submission and summary by submission type.

The report shows all accounts that are active on the web.

The detail shows each account.



VIEW & PRINT REPORTS

Portal Admin / View & Print Reports

Some reports may contain large amounts of data and could take several minutes to process.

REPORTS

Reports: Billing Report Detail

Beginning Date: 01/01/2025

Generate Report

BILLING REPORT DETAIL

Export File Type: Acrobat (PDF) File

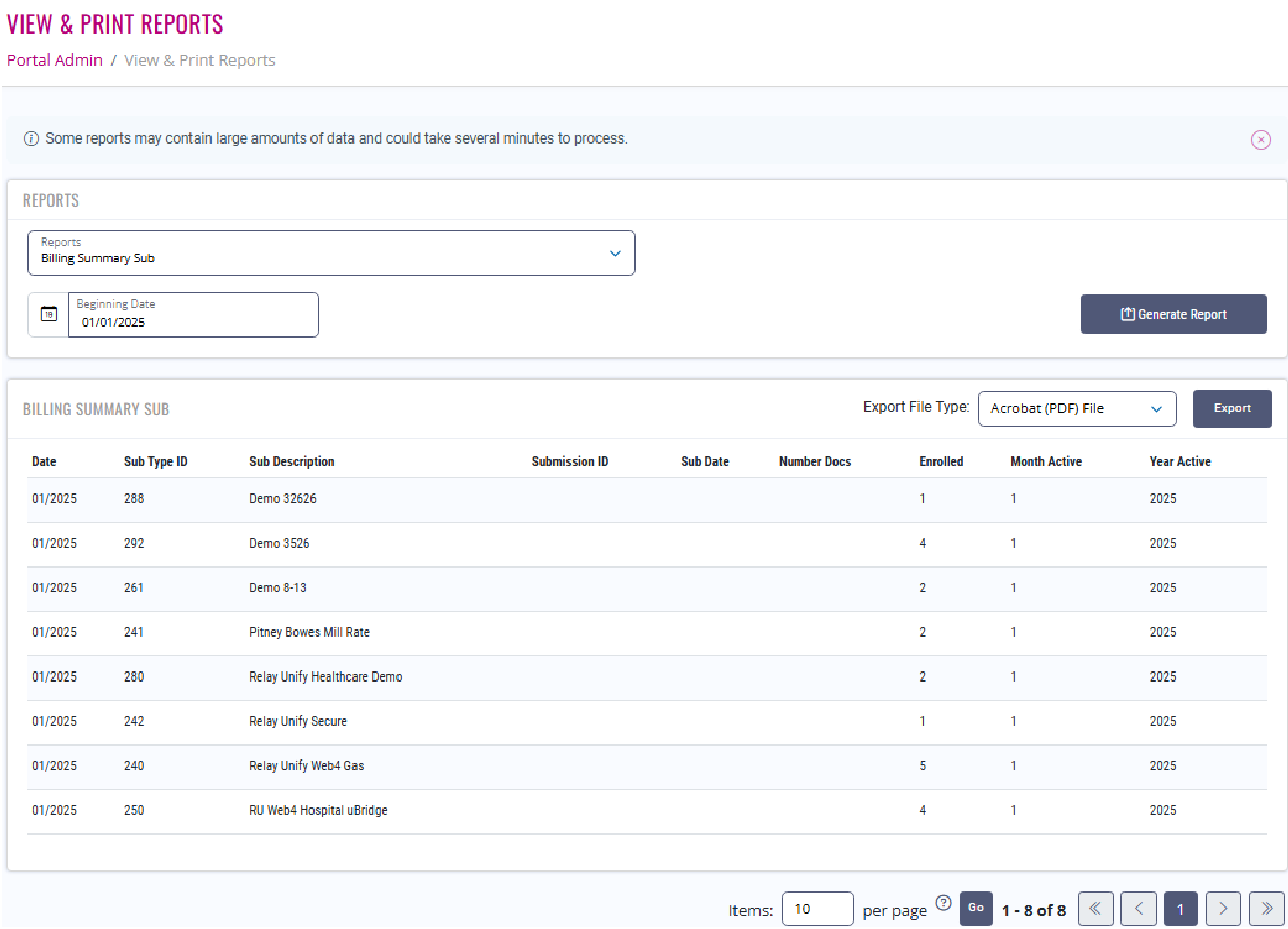
Export

Date	Sub Type ID	Sub Description	Submission ID	Sub Date	Account	Enrolled	Month Active	Year Active
01/2025	240	Relay Unify Web4 Gas			1010123456789	Y	1	2025
01/2025	240	Relay Unify Web4 Gas			123454321	Y	1	2025
01/2025	240	Relay Unify Web4 Gas			269275	Y	1	2025
01/2025	240	Relay Unify Web4 Gas			71698	Y	1	2025
01/2025	240	Relay Unify Web4 Gas			71701	Y	1	2025
01/2025	241	Pitney Bowes Mill Rate			1010123456789	Y	1	2025
01/2025	241	Pitney Bowes Mill Rate			71698	Y	1	2025
01/2025	242	Relay Unify Secure			71698	Y	1	2025
01/2025	250	RU Web4 Hospital uBridge			123123123-01	Y	1	2025
01/2025	250	RU Web4 Hospital uBridge			550470108000	Y	1	2025

Items: 10 per page Go 1 - 10 of 21 1 2 3

Billing Summary Sub

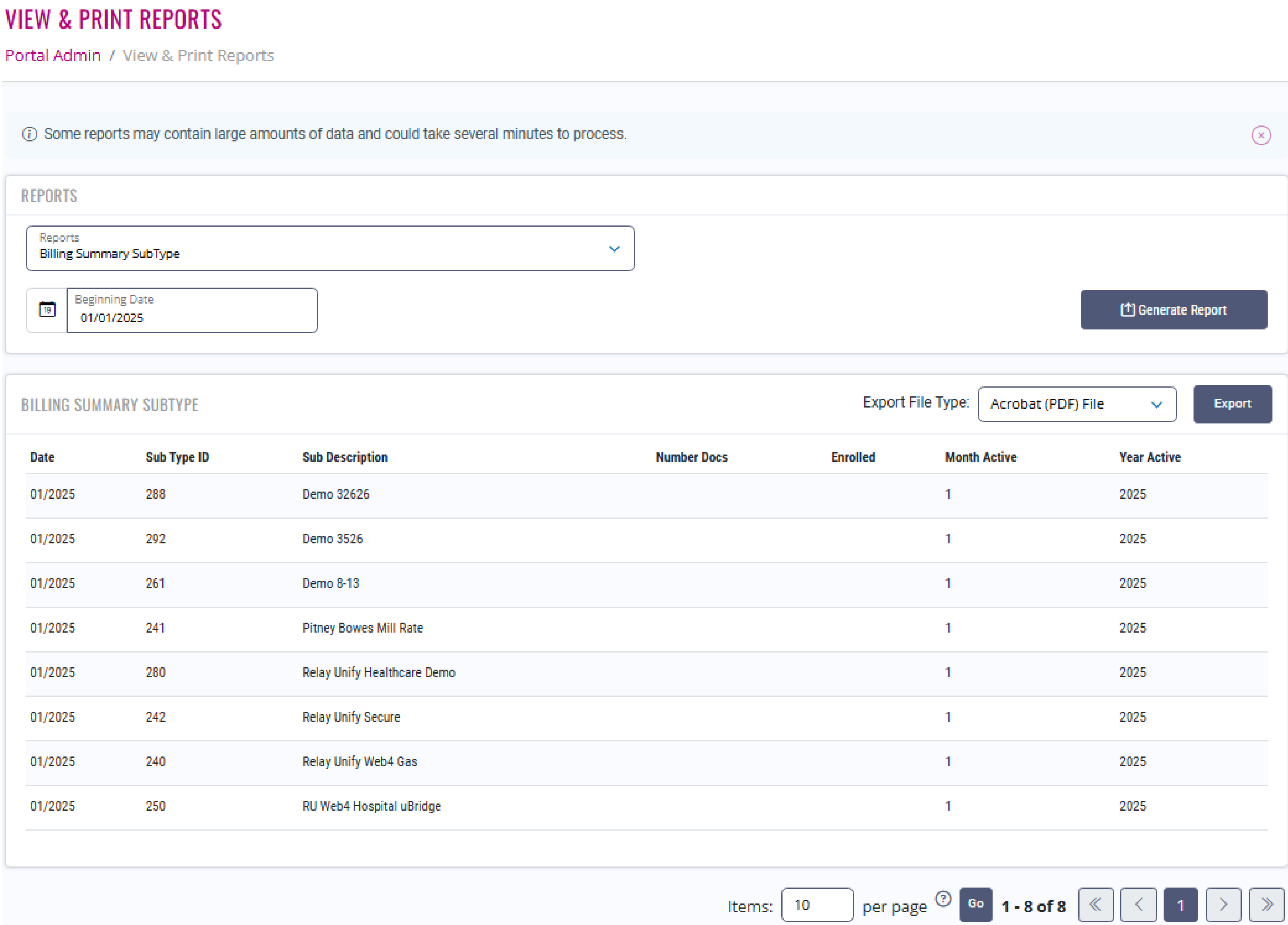
The Summary by Submission shows the total number of enrollees for a submission.



Date	Sub Type ID	Sub Description	Submission ID	Sub Date	Number Docs	Enrolled	Month Active	Year Active
01/2025	288	Demo 32626				1	1	2025
01/2025	292	Demo 3526				4	1	2025
01/2025	261	Demo 8-13				2	1	2025
01/2025	241	Pitney Bowes Mill Rate				2	1	2025
01/2025	280	Relay Unify Healthcare Demo				2	1	2025
01/2025	242	Relay Unify Secure				1	1	2025
01/2025	240	Relay Unify Web4 Gas				5	1	2025
01/2025	250	RU Web4 Hospital uBridge				4	1	2025

Billing Summary SubType

The Summary by Submission Type shows the total number of enrollees by submission type.

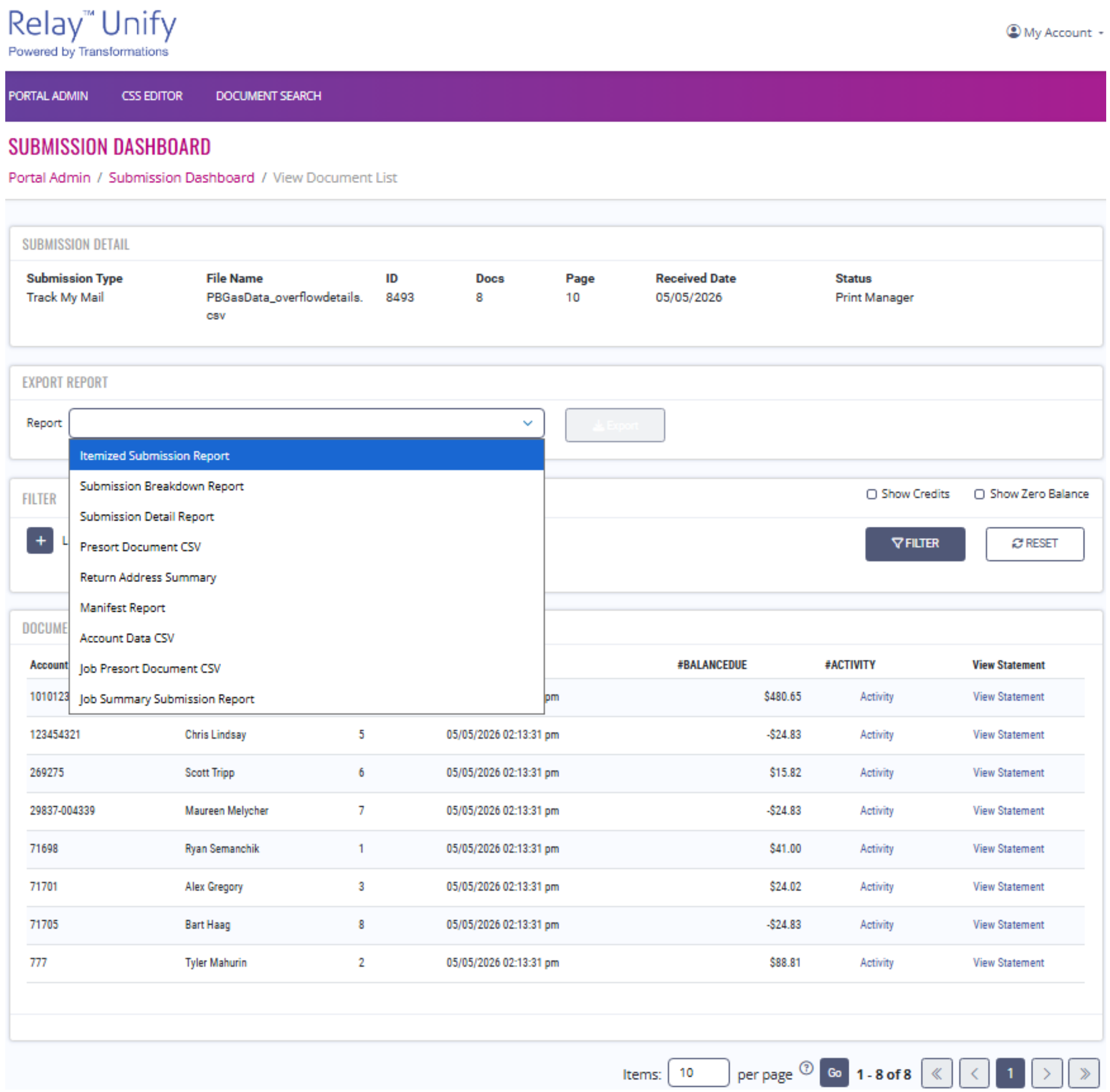


Date	Sub Type ID	Sub Description	Number Docs	Enrolled	Month Active	Year Active
01/2025	288	Demo 32626			1	2025
01/2025	292	Demo 3526			1	2025
01/2025	261	Demo 8-13			1	2025
01/2025	241	Pitney Bowes Mill Rate			1	2025
01/2025	280	Relay Unify Healthcare Demo			1	2025
01/2025	242	Relay Unify Secure			1	2025
01/2025	240	Relay Unify Web4 Gas			1	2025
01/2025	250	RU Web4 Hospital uBridge			1	2025

Submission Dashboard Reports

Select the Report from the dropdown list. A new tab will display the report. The report can be printed or saved.

This will display any and all of the autoprint reports, pregeneration report, or custom reports that generated for the ***submission***. All reports that are displayed in the reports tab for a submission within uControl will be available within this dropdown list.



Adding Custom Report to Relay Unify

This document will detail the process of adding a Custom Report to Relay Unify.

This document will not address how the Report is created. It will only address how the Report will be made visible in Relay Unify after it has been created.

Create Report

The Report is created outside of Relay Unify. Currently there is no automated process that will generate Reports outside of Relay Unify. One Suggestion is to create a Scheduled Task that will check the Status of submissions or Jobs and create reports as necessary. This process would then have to update the Relay Unify Database to allow Relay Unify to know that the Report Exists.

To determine the status of submission and the status of a Report for the submission can be accomplished using the following query.

```
select c.submid
from submissions c
where status in ('A','J','C')
and not exists (
select b.subjobrptid
from reports a, subjobrpt b
where a.rptid = b.rptid
and b.submid = c.submid
and a.repdesc = 'Custom Report 1'
and b.createdflag = 'Y'
)
order by c.submid
```

The above will give you a list of Submissions in ‘A’ (Ready to Print), ‘J’ (Job Select), or ‘C’ (Complete and Mailed) statuses where the report ‘Custom Report 1’ is not in the Subjobrpt table or is not marked as created in the Subjobrpt table for the submissions.

The report must exist in the Report table or this will produce a list of all submissions.

Database

The Reports table contains the List of available reports for Relay Unify. All other tables link to this table on the RPTID field. The 1st step in adding a Report to Relay Unify is to add a record to the Reports table. The fields in the Reports table are:

RPTID – Auto Generated. Do NOT attempt to populate this field. When a Record is added it will generate a New RPTID automatically.

RepDesc – Varchar(30) – Required. This id the Description of the Report. This description is displayed on the Web.

CreateDate – Datetime – Required. If this is left out of the insert query it will be automatically populated with the current date and time.

Createby – Varchar(15) – Required. This is the Person that created the Entry. Some Identifier to indicate who added the record.

Moddate – Datetime – Not required.

ModBy – Varchar(15) – Not required.

Status – Varchar(1) – This must be 'A' if the report is to be available.

FileSpec – Varchar(40) – This is the File Specification. This will describe the Report Naming Convention for Relay Unify to locate the correct file. This must be unique and contain %S in the field. Relay Unify will populate the %S with a 12-digit zero padded field of either the Submid or Jobno depending on Report Type.

Reporttype – Varchar(1) – This will be either S for Submission or J for Job. Only Submission Level reports are available on the Web.

AutoGen – Varchar(1) – This will be Y if the report is autogenerated. For Custom reports this should be 'Y'. This means that Relay Unify is not generating the Report.

ReportDLL – Varchar(50) – This is the DLL that Relay Unify will call to generate the Report.

AutoPrint – Varchar(1) – With this Y the report will be automatically printed.

PrintOrder –Smallint – This is the order in which it is to be printed.

PrintCopies – Smallint – This is the number of copies to print.

This is a sample insert query for the Reports table:

```
Insert into Reports (repDesc, createdate, createdby, status, filespec, reporttype, autogen)
Values
('Custom Report 1',getdate(), 'Relay Unify','A'
         'RPT%S.CRP1.PDF','S','Y')
```

This will add to the Report table for a report called ‘Custom Report 1’. The createdate will be current date and time. The created by user will be ‘Relay Unify’. The status will be ‘A’ (active). The filespec will be ‘RPT%S.CRP1.PDF’. An example of the report name would be ‘RPT000000010000.CRP1.PDF’. The report is a Submission level report. The report is autogenerated.

Only .PDF or .TXT files can be printed and .TXT files will be printed by calculating the largest font size required to put all characters across on a single page.

SubJobRpt

The SubJobRpt table contains a list of the Report that should be available for a Submid or jobno. This table also defines the location of the Report, the Report status and the email status of the Report. The fields in this table are:

SubJobRptID – Auto Generated. Do NOT attempt to populate this field. When a Record is added it will generate a New SubJobRPTID automatically.

Submid – Bigint – This should be populated with the Submid if the report is a submission report. This should be null if it is a Job Report.

Jobid – Bigint – This should be populated with the Jobid if the report is a Job report. This should be null if it is a Submission report.

RPTID – Bigint – This is a link to the Reports table.

CreateDate – Datetime - This is the date and time the record was created. This is not the Date the Report was created.

ReportDate – Datetime – This is the date and time the report was created.

CreatedFlag – Varchar(1). Once the report is created this should be set to ‘Y’.

Location – Varchar(200). This is the fully qualified path (UNC Path) where the report file is located. The Relay Unify System must be able to access this directory. The Relay Unify Reports use the Directory RPT below the Submit directory for location. This must be provided and must be correct, or the report will not be found.

Mailitem_id – Integer – This is the link to the SQL email system. If the email is created outside of SQL Email, then this will have a negative number. If created by SQL Email, then this will have a positive number linking to the msdb.dbo.sysmail_allitems view. This should be set to Null.

EmailCreated – Varchar(1) – This will be set to Y when the email is created. This should be set to N or left Null until the Email is created.

Printed – Varchar(1) - This will be set to Y when the report is printed. This should be set to N or Left Null until it is printed.

PrintedDate – Datetime – This will be the date and time the report was printed. This should be set to Null.

When the Report is created by the external program it should check for a Report in the Subjobrpt table for the Submission or Job with the correct rptid (from the Reports table). If the record exists in the SubjobRPT table it should be updated with the Report date, location, and the createdflag should be set to Y.

If the record does not exist in SubjobRPT table then a record should be added with the Report date, Location, and the createdflag set to Y.

A sample of the Queries:

Check for Record in Subjobrpt table.

```
select b.subjobrptid, b.createdflag
from reports a, subjobrpt b
where a.rptid = b.rptid
and b.submid = 200
and a.repdesc = 'Custom Report 1'
```

The above will give you the subjobrptid to be updated. If this is blank, then an insert must be performed. The above query looks for report 'Custom Report 1' for Submission ID 200. If the report were a Job no report, then the query would be:

```
select b.subjobrptid , b.createdflag
from reports a, subjobrpt b
where a.rptid = b.rptid
and b.jobid = 200
and a.repdesc = 'Custom Report 1'
```

If it returns a value for subjobrptid then check the Createdflag. If the createdflag = 'Y' then the record has already been filled out. If the createdflag = 'N' or is null then update the record.

```
update subjobrpt
set reportdate = getdate(),
createdflag = 'Y',
Location = '\\server\dir1\dir2\'
where subjobrptid = 235
```

The above will update subjobrptid 235 with the current date and time, change the createdflag to 'Y' and fill out the location of the report file.

If subjobrptid returns blank, then you will need to insert a record for the report. This query inserts a record.

```
Insert into subjobrpt
(submid, rptid, createdate,
reportdate, createdflag,location)
values
(200, 25, getdate(),
getdate(), 'Y','\\server\dir1\dir2\')
```

The location should end with \

SysEventrpts

The SysEventRpt table links reports to email events. Only certain email events will email reports. The SystemEvents table contains the list of email events that can be created for a given submission. Only the “Breakpack Reports”, “Cleansing Reports”, “Presort Submission Reports”, “Presort Job Reports”, and “BUOB NCOA Reports” events will email reports.

The SysEventRpt table fields are:

Event ID – Integer – This should be one of the event id’s of the above listed reports.

PRTID – Integer – This should be a report id from the Reports table.

For the report to be emailed with the specified Email event the report must exist at the time the email is created.

Breakpack Reports event will occur after the submission is finished with Breakpack. If the Custom Report does not exist when the Event is run, then it will not email the report.

Cleansing Reports event will occur after the submission is finished with Address Cleansing. If the Custom Report does not exist when the Event is run, then it will not email the report.

Presort Submission Reports event will occur after the job is finished with Presort. If the Custom Report does not exist when the Event is run, then it will not email the report.

Presort Job Reports event will occur after the job is finished with Presort. If the Custom Report does not exist when the Event is run, then it will not email the report.

BUOB NCOA Reports event will occur after the job is finished with NCOA. If the Custom Report does not exist when the Event is run, then it will not email the report.

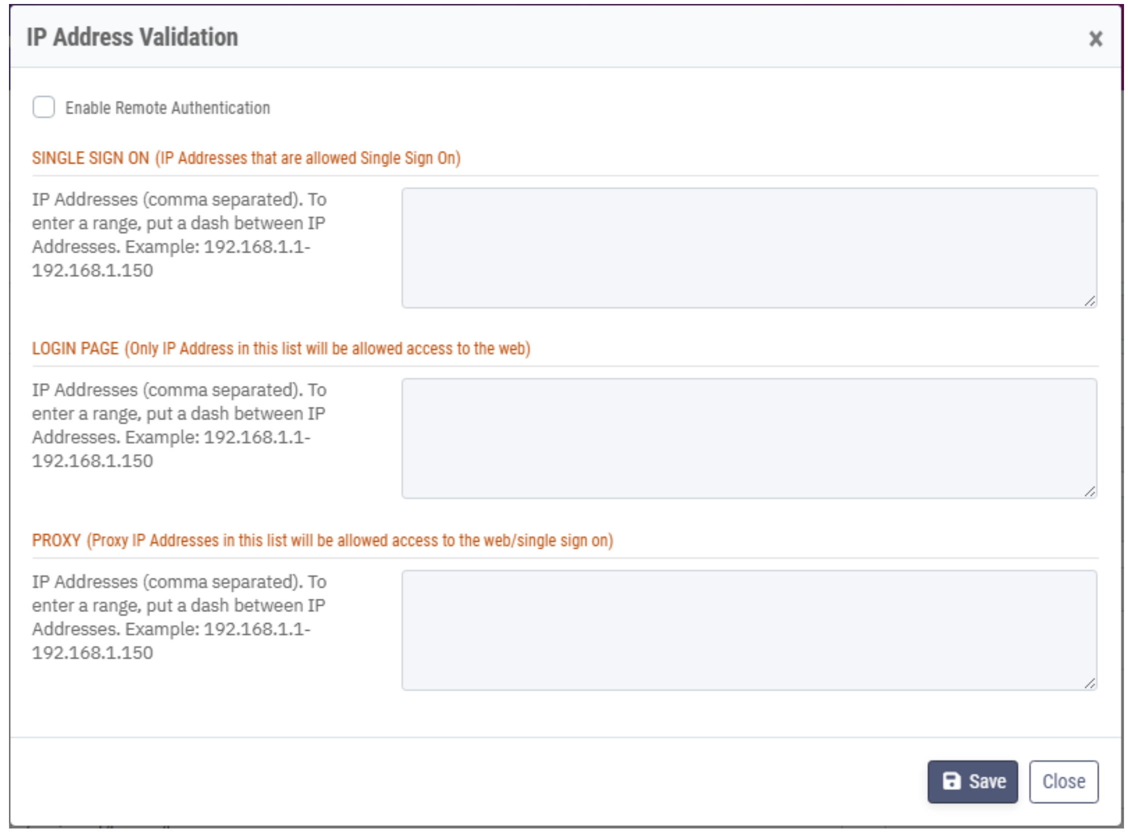
Web

If the Report is entered into the Reports table and entered into the SubJobRPT table as a Submission Report, then it will automatically be available on the Submission Screen with the rest of the reports.

The SubjobRPT record must have a created flag of ‘Y’, a valid location for this to work. The Reports table record must have a status of ‘A’, and the FileSpec must return a valid file name when the %S is substituted with the submission ID. The FileSpec ‘RPT%S.big.pdf’ would return ‘RPT000000001087.big.pdf’ if the submission id was 1087.

IP Address Validation

Click on the IP Address Validation button in Web Setup.



Single Sign On

Use this area to enter in IP Addresses that are valid to do Single Sign On. If an IP Address attempts to connect to the site, it will be rejected if not in the list.

Ranges can be entered in using a dash and addresses should be comma separated.

Login Page IP Validation

Use this area to restrict access to the website to IP Addresses that are in the list.

Ranges can be entered using a dash and individual addresses should be comma separated.

Proxy Validation

Use this area to allow access through a proxy server.

Ranges can be entered using a dash and individual addresses should be comma separated.

Remote Authentication

Remote Authentication for the web is not enabled by default since the only security is the IP Address of the requestor and only if the IP Address Validation is enabled in uSetup.

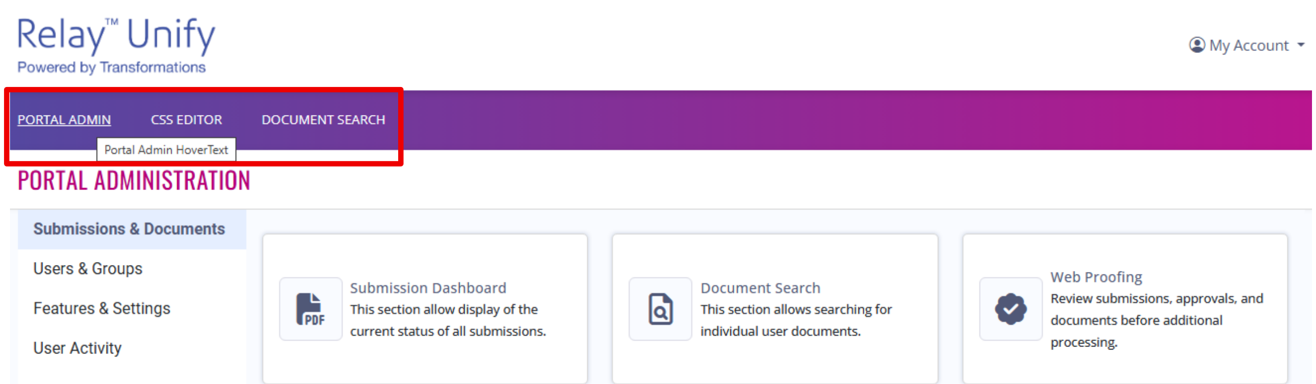
If you would like to turn this setting on/off at a client level setting, that can be done under Web Setup for each client.

Click on the IP Address Validation button within a client's web setup. Check the Enable Remote Authentication box at the top of the window.

Enter the IP Addresses or Proxy Server IP Addresses in the appropriate box that will be using Remote Authentication.

Click Save.

Landing Page Navigation Bar



Master links will appear along the top of all pages once a user is logged into the site. To manage where the pages/links will appear on the web site, click on Landing Page Navigation Bar Tab under the Site Design Dropdown Tab.

Click + Add Page Link.

If it is an internal page, check the **Internal page Link** box. If it is an internal page, you will be required to select a custom page from the **Page** dropdown. If it is not an internal page, you can manually enter in a URL in the **URL** field.

Enter a **Description**.

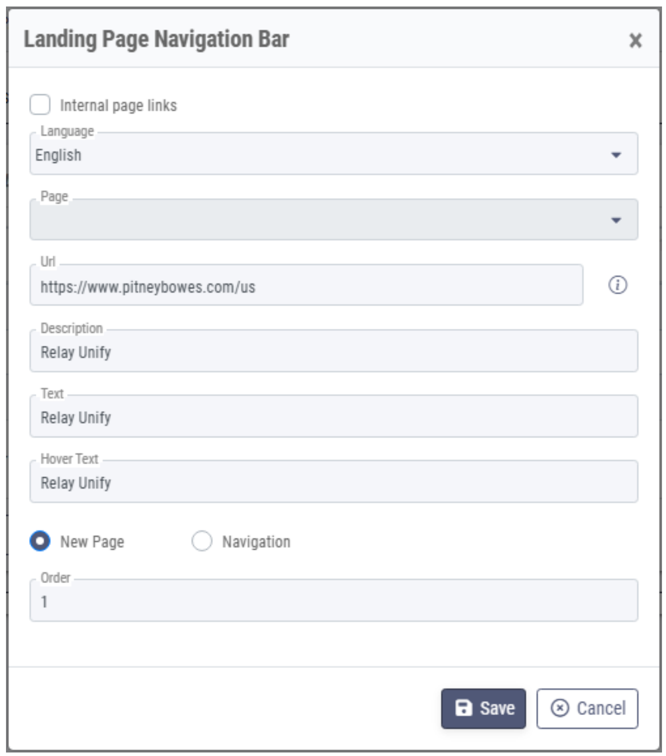
Enter in the **Text** that will appear on the site as the link.

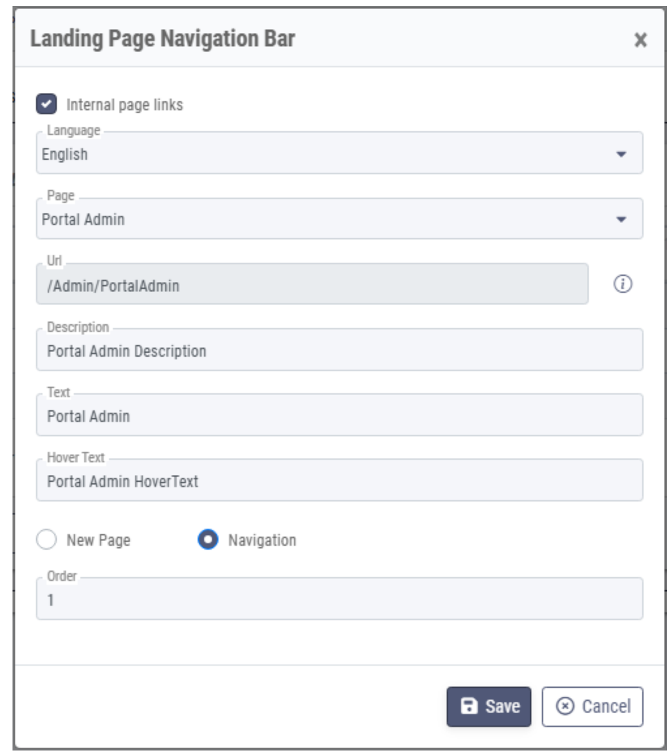
Enter the **Hover Text** that will be displayed when the link is hovered over.

Select either New Page or Navigation for the **Target**. This will also be dependent on the browser of the user.

Select the **Order** you want the page to appear.

Click Save.





DNS Configuration for Relay Unify

Overview

Relay Unify uses the form:

```
client.domain.name
```

Where client is the client name and domain.name is the desired domain.

For example: if my preferred domain was documents.com and I had a customer whose name as ABC, a good url for would be abc.documents.com

This is done to allow a service bureau to host a url in a domain that belongs to their customer. Using the above example: ABC company may have domain named ABC.com and may want their portal to reference portal.abc.com.

Unless a dedicated domain is used the following must be done for every new site added to Relay Unify:

1. A new DNS A record must be added to the authoritative DNS server for the new URL and must be pointed to the IP address of the Relay Unify web server.
2. The url must be add to the bindings for the Relay Unify site in Microsoft Internet Information Server (IIS).

Dedicated Domain

The above approach results in IT involvement for each new client. For this reason, Transformations recommends acquiring a separate domain for the use of the Relay Unify web server. This domain can be either a root domain such as documents.com or a sub domain such as sites.documents.com. In the latter case the url would become company.sites.documents.com.

To reduce IT involvement, obtain a new domain and ensure it contains a wildcard A record that points to the Relay Unify web server such as:

```
*.domain.name    59    IN    A     10.10.0.1
```

Where domain.name is your domain and 10.10.10.1 is the IP address of the Relay Unify webserver.

On the Relay Unify web server ensure that the default binding (*/80) is associated with the Relay Unify site.

If you have any questions, feel free to contact Ulruo Support.

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 Print Manager.
- ***Print Manager User*** – A user that is created in Print Manager and only has access to log into Print Manager. This user is set up in addition to the Relay Unify user because 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.

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 uCompose, 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 print 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 setup 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.