



Ship & Mail
Mailing Software

Relay Unify Workflow Manual

Set-up and Process Jobs

User Guide

US English Edition
January 2025

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Table of Contents

TABLE OF CONTENTS 1

INTRODUCTION..... 7

IMPLEMENTATION SUMMARY 8

CONTROL BUTTONS 9

SUBMIT DIRECTORY 10

USETUP 11

 MAIN MENU 12

 Version 12

 Change Password 12

 Exiting the program 14

 DB Connection 15

 Activating Additional Modules 16

CONFIGURE MENU – GLOBAL SETTINGS 17

 Global Settings – Password Settings 17

 User Management..... 18

 Work Calendar 20

 Processes & Directories 21

CREATE A NEW CUSTOMER..... 30

USETUP MAIN WINDOW..... 31

CUSTOMER LEVEL SETTINGS 32

 NOTES 33

 CONTRACTS 34

EMAIL SETUP.....	35
Outgoing.....	35
Incoming.....	36
Tracking.....	36
CONTACTS	37
CREATE A NEW SUBMISSION TYPE.....	38
Email to Directory	40
CLEANSING	42
PRESORT	43
CONSUMABLES: FORMS AND ENVELOPES	44
CREATE EMAIL EVENTS	48
Custom Email Event.....	50
Additional Tags in Email Events.....	51
Daily Schedule Email Event	53
SLA Emails.....	55
PREPROCESSING	57
XML data providing body of emails	61
POSTPROCESSING	62
Parameters.....	62
Stored Procedure in Relay Unify Database	62
Stored Procedure in Web database	63
External Program	63
Post Processing Service	64
Alternative Directory	64

Relative path for Program	65
Logging.....	65
Installing	66
Split Submission based on Page Count.....	67
How to import/setup web user fields from input data	71
How to Use Email Address From Input data	72
Auto Merge Job for Merging within one Submission.....	75
Consistency of HTML Emails	76
COPY A SUBMISSION TYPE	77
SUBMISSION TYPE REPORT.....	79
UCONTROL	81
LOGGING OUT.....	81
VERSION	82
SETTING A COLOR SCHEME.....	82
DB CONNECTION.....	83
VIEW SUBMISSIONS TAB	84
Submission Transaction Details	87
Hold For Confirmation	93
Submission Cancelled Logging.....	96
Resending Emails	97
Hold Email Events	98
Resubmitting Submissions	99
SUBMISSIONS TAB IN USETUP	103
CREATE A JOB.....	105
HOLD & RELEASE	108

VIEW JOBS TAB	110
SHOW EXTERNAL JOB NAME	113
External Document Interface.....	113
RELAY UNIFY STATUSES.....	117
RELAY UNIFY REMAP	121
EXIT THE PROGRAM.....	121
VERSION	121
DB CONNECTION.....	122
MAIN FORM	123
Submissions Tab.....	124
Map History	125
SUBMISSION EXPIRATION	126
SUBMISSION TYPE EXPIRATION SETTINGS.....	126
UDEL SUB.EXE.....	127
Exiting the Program.....	127
Version	127
Database Connection.....	128
Parameters.....	129
Deleting Submissions.....	130
TICKETS FOR TRACKING	132
SUBMISSION TICKET	132
CONSOLIDATED JOB TICKET	140
Templates.....	140
Enabling the Consolidated Job Ticket.....	142
Manually Printing the Consolidated Job Ticket	143

PRINT JOB TICKET	147
Print Job Ticket Templates.....	148
Enable in Printer Jobs	150
Enable in Print Configurations.....	151
Manually printing the Print Job Ticket	152
REPORTS	155
AUTOPRINT REPORTS	155
Account Data CSV	158
Bad Address CSV/Bad Address Report.....	168
Change Address CSV	169
Itemized Submission Report	178
Job Presort Document CSV	179
Job Summary Submission Report	180
Mandrill HTML Emails Errors Report	181
Mandrill HTML Emails Submitted Report	182
Manifest Report	183
NCOA Move Report	184
Presort Document CSV	185
Print Summary Report.....	186
Return Address Summary	187
Submission Breakdown Report	188
Submission Detail Report	189
Submission Email Report.....	190

JOBTICKETPRINT.EXE	191
Exit the Program.....	191
Database Connection.....	191
REPORT GROUPING	193
Creating Report Group Email Events.....	194
REPORTS TAB IN WEB SETUP / REPORTS MAIN ON USETUP MAIN PAGE	195
Multi Channel Delivery Report	197
Submission Type Usage Report	198
DISPLAYING CUSTOM REPORTS ON THE WEB, IN UCONTROL, AND UPRINT	199
ADDING REPORT TO RELAY UNIFY	199
ADDING SUBMISSION REPORT	199
TO ADD THE REPORT RECORD AND/OR THE SUBMISSION REPORT RECORD.....	200
CREATING SUBMISSION REPORT WITH POST PROCESSING	201
NAMING CUSTOM REPORTS	201
SERVICES	202
WORKFLOW PROCESS FLOW.....	203
RELAY UNIFY GLOSSARY	208

Introduction

Relay™ Unify, Powered by Transformations is a Job tracking solution that provides visibility throughout the entire production process. With a complete operational tracking solution with SLA management, job ticket support, and multiple Dashboards, Relay Unify provides each person in the manufacturing process with a simple interface to help them manage and track production jobs and mail pieces.

Relay Unify has an open interface table to support jobs created in other composition systems and supports, tracking them through print, insertion and mailing; with the ability to support full job or piece level verification. The Relay Unify Reprint feature has automated reprinting of damaged pieces and provides 100% verification of mailing (no human interaction is required when pieces are damaged in the printing process, Relay Unify automatically reprints them!).

- Automated File Receipt & Data Validation
- Job Setup and Configuration
- Combining/Co-Mingling
- Job Tickets
- eDelivery
- Extensive Reporting Dashboards

Implementation Summary

1. Create a client.
2. Configure client level settings.
3. Set up your Submit directory with all images, maps, etc. for the client.
4. Create cleansing and presort templates.
5. Create a submission type.
6. Setup email and email events.

You are ready to run jobs through!

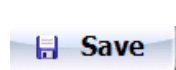
Control Buttons



New – Click to create a new record.



Edit – Click to edit a record.



Save – Click to save changes made to a record.



Cancel – Click to cancel changes made to a record.



Copy – Click to copy a record and then edit as desired.



Delete – Click to delete a record.



Close – Click to close the form.



Navigator:

- First Record
- Back 5 records
- Previous record
- Next Record
- Forward 5



These buttons allow the user to add a new item.



These buttons allows the user to edit an item.



These buttons allow the user to save the item you just edited/added.



These buttons always allow the user to cancel any changes made to the item.



Navigator:

- First Record
- Previous record
- Next Record
- Last Record

Submit Directory

Images – The images used in the maps will be in this directory.

Maps – The maps that create the documents will be in this directory.

FTP – The data files will be placed in this directory to be picked up and create a submission.

Web – The data files that are uploaded on the web will be placed in this directory to be picked up and create a submission.

Prep – The preprocessing files will be placed in this directory.

GCA – This is where the mail.dat files will be placed once they are created.

RPT – The reports that are generated for submissions and jobs will be placed in this directory.

PRT – The print files created by print jobs and print configurations will be in this directory.

PDF – Any pregenerated PDFs created will be in this directory.



Tips:

These directories should have client folders that contain submission folders to organize the files in each directory.

uSetup

This program will be used to create clients, websites, and the business rules around documents/submission types.

Relay™ Unify
Powered by Transformations

GLOBAL SETTINGSMANAGE CUSTOMERS

James Smith

Setup | Administrative Dashboard
Manage Nodes, Users, Customers, & Settings

Uluro North America | Transqa2_QC serverChange Context

NODE MANAGEMENT

Create and manage root and instance level nodes and settings

View NodesCreate New

MANAGE CUSTOMERS

Manage customer profile, settings, and submission types

View CustomersCreate New

REGULATORY COMPLIANCE

Manage global regulatory compliance and report settings

View RequirementsView Reports

USERS & GROUPS

Manage uSetup Users, Groups, Membership, & Permissions

View UsersView Groups

SYSTEM NODES

NODES YOU MOST RECENTLY MANAGED

NODE NAME	NODE TYPE
Transqa2_QC server	UluroManage

View All Available Nodes

CUSTOMERS

CUSTOMERS YOU MOST RECENTLY MANAGED

ID	CUSTOMER NAME	
5125	March Web4 Testing	Manage
5115	Pitney Bowes	Manage
202	Membership setting testing	Manage
177	Cynthia QC Testing	Manage
198	2023 Jan_ Demo	Manage
5110	CRM Integration Testing	Manage

View All Customers

pitney bowes

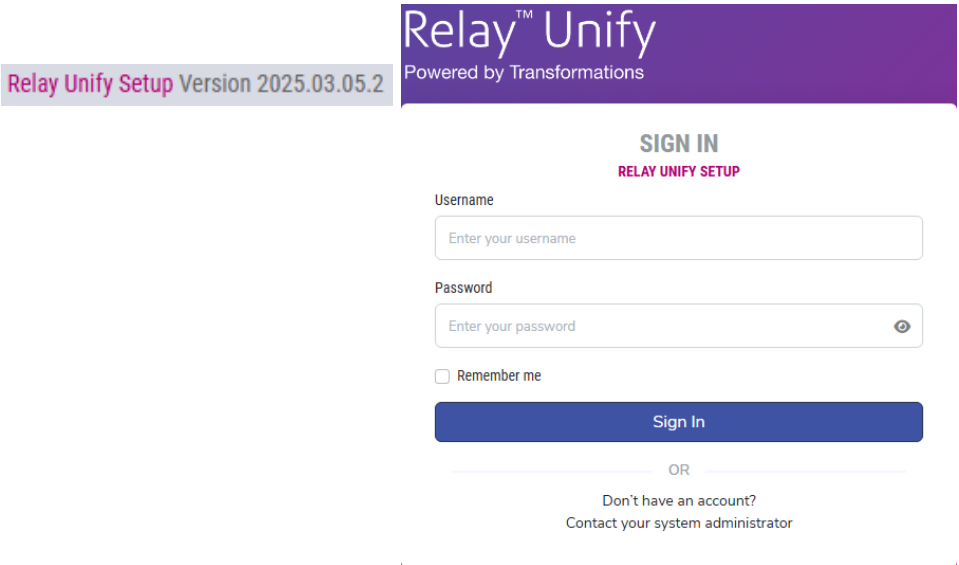
Copyright © 2015 - 2025 Pitney Bowes Inc. All rights reserved.

AccessibilityPowered By TransformationsRelay Unify Setup Version 2025.03.05.2

Main Menu

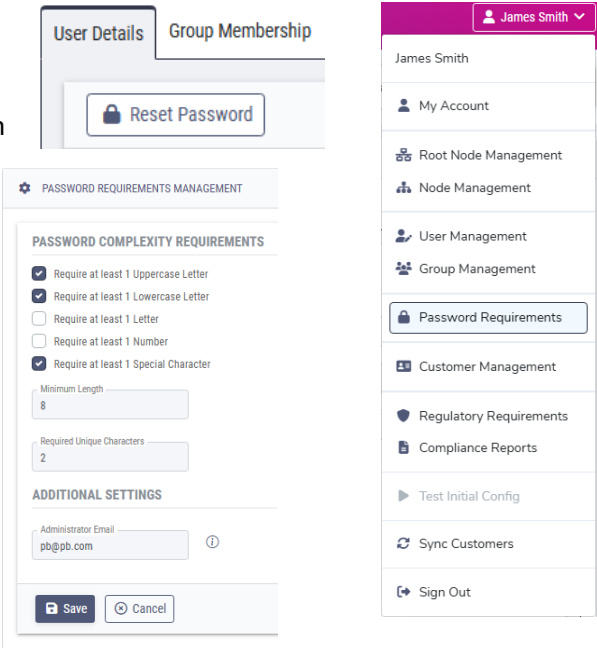
Version

To determine the version of uSetup that you are running, just login and it's on the bottom right corner of your main page.



Change Password

The user can change their own password by selecting Change Password under the User menu. Type in the new password and confirm it. If the password doesn't satisfy the requirements there will be an error message detailing the requirements for the password. These requirements come from the Admin. User dropdown tab.

A modal dialog box titled "Reset Password" with a close button (X) in the top right corner. It contains two input fields: "New Password" and "Confirm New Password", both with eye icons for toggling visibility. At the bottom right, there are two buttons: "Save" (with a lock icon) and "Cancel" (with a close icon).

These can be found under the Global Settings menu from the dashboard. Choose the Web Settings -> Web User Password Settings from the dropdown tab.

WEB USER PASSWORD SETTINGS

STANDARD PASSWORD POLICY

- ☒ Require at least 1 Uppercase Letter
- ☐ Require at least 1 Number
- ☐ Require at least 1 Letter
- ☒ Require at least 1 Special Character

Minimum Length:

ENHANCED PASSWORD POLICY

- ☒ Enable Enhanced Password Policy
- ☒ Lockout Users after consecutive failed attempts

PASSWORD RESET OPTIONS

Cannot reuse a password for days (0 disables this feature) ⓘ

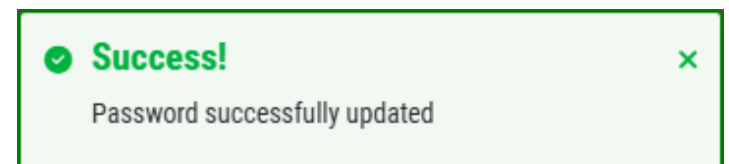
- ☐ Users can only change their password once per 24 hours
- ☐ User must enter current password on password change

PASSWORD EXPIRATION OPTIONS

- ☒ Send password expired email days before password expiration, once per day ⓘ

Save **Cancel**

Once you have entered a password that meets the requirements, there will be confirmation that the password has been changed.



Exiting the program

Under the profile dropdown tab in the upper right-hand corner, click on the name shown. Choose at the very bottom, the Sign Out option, to sign out.



Once you sign out, it will take you back to the main web sign in page where you can log back in as any user.

Enter your login credentials to sign back in.

Relay™ Unify

Powered by Transformations

SIGN IN

RELAY UNIFY SETUP

Username

Enter your username

Password

Enter your password

☐ Remember me

Sign In

OR

Don't have an account?

Contact your system administrator

Welcome to your account dashboard.

RELAY UNIFY SETUP

RELAY UNIFY CONTROL

View Available Applications

DB Connection

The first time you log in to uSetup, or any other Relay Unify Module, you will be asked to set up your connection parameters. You can change this at any time by selecting Connection in the Database menu.

Server: This is the SQL server name.

Database: This should always be Relay Unify.

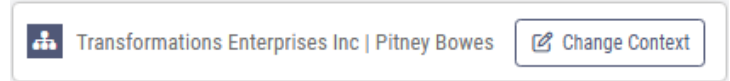
User ID – This is typically trans, or whatever the SQL database connection login is, which is not stored anywhere.

Password – This is typically trans, or whatever the password for the SQL server login is, which is also not stored anywhere.

Integrated Security (Windows) – If this is checked, then the Windows domain user login for the SQL server will be used for UserID/PW. (This is not recommended).

DB Provider – If you are not using TLS select SQLOLEDB. If you are using TLS 1.2 select either SQLNCLI11 or MSOLEDBSQL.

DB Port-- This is set up through your I.T. team. It can be left blank if a dynamic port through SQL Server is not configured.

A screenshot of the 'MANAGE NODE' dialog box, specifically the 'Database Connection' tab. The dialog has a title bar with a gear icon and the text 'MANAGE NODE'. Below the title bar are four tabs: 'Node Details', 'General Settings', 'Branding', and 'Database Connection'. The 'Database Connection' tab is active. It contains several input fields: 'Database Server Name' with the value 'DATABASE\SERVERNAME', 'Database Name' with the value 'DB NAME', a checkbox for 'Use Integrated Security' which is unchecked, 'Database Username' with the value 'DB USERNAME', 'Database Password' with masked characters '*****', and 'Database Port' with the value '1433'. At the bottom are 'Save' and 'Cancel' buttons.A screenshot of the 'MANAGE NODE' dialog box, specifically the 'Database Connection' tab. The dialog has a title bar with a gear icon and the text 'MANAGE NODE'. Below the title bar are four tabs: 'Node Details', 'General Settings', 'Branding', and 'Database Connection'. The 'Database Connection' tab is active. It contains several input fields: 'Database Server Name' with the value 'DATABASE\SERVERNAME', 'Database Name' with the value 'DB NAME', a checkbox for 'Use Integrated Security' which is checked, 'Database Username' (empty), 'Database Password' (empty), and 'Database Port' (empty). At the bottom are 'Save' and 'Cancel' buttons.

Activating Additional Modules

Under the File menu, select Activation Codes.

If you have Relay Unify uBridge, Relay Unify Print Manager, or Relay Unify Customize, Pitney Bowes support will create a key for you that will appear here. The support team will enter the key upon installing the module. Please contact support if you have further questions regarding activation keys.

ACTIVATION CODES

Global Settings

MODULES

Click a row to enter/re-enter a key. If you would like to re-activate a particular module, click the  icon.

SERVER NAME: TRANS-QA-SQL\TRANSQA2

MODULE	ACTIVATION KEY	ACTIVATION DATE	
Uluro	Uluro_serial_key	11/17/2017 9:31:33 AM	
uBridge	z37X00JE0qhmY+O5ZRWWvh4B8i2D5gbeJ8cSfLlIO	7/10/2019 8:41:58 AM	
Print Manager	z37X00JE0qhmY+O5ZRWWvh4B8i2D5gbl/b9ufXlRu	7/10/2019 8:42:36 AM	
Campaign Manager	z37X00JE0qhmY+O5ZRWWvh4B8i2D5gaEQNOM9tag6	7/10/2019 8:43:13 AM	

USECURE DETAILS

LICENSE STATUS:	Active	ACTIVATION DATE:	3/13/2025
LICENSE EXPIRES:	3/13/2027		

Configure Menu – Global Settings

Global Settings – Password Settings

The password requirements for Relay Unify web users are found under the Global Settings menu on the main uSetup screen. Select Global Settings then go to the Web Settings tab, then choose Web User Password Settings. The top section of Password settings will apply to Relay Unify web users.

WEB USER PASSWORD SETTINGS

STANDARD PASSWORD POLICY

☒ Require at least 1 Uppercase Letter

☐ Require at least 1 Number

☐ Require at least 1 Letter

☒ Require at least 1 Special Character

Minimum Length

8

ENHANCED PASSWORD POLICY

☒ Enable Enhanced Password Policy

☒ Lockout Users after

5

 consecutive failed attempts

PASSWORD RESET OPTIONS

Cannot reuse a password for

60

 days (0 disables this feature) ⓘ

☐ Users can only change their password once per 24 hours

☐ User must enter current password on password change

PASSWORD EXPIRATION OPTIONS

☒ Send password expired email

7

 days before password expiration, once per day ⓘ

Save

Cancel

Back to Dashboard

Monitor Services

Processes & Directories

Business Classifications

Consumables

Print Settings

Postal Settings

SLA Management

Email Tracking (Mandrill)

Locations

Ticket Templates

Reports

Web Settings

Captcha Configuration

Web User Password Settings

Multifactor Questions

Hierarchy

Custom Web Pages

uDeliver

uCampaign Management

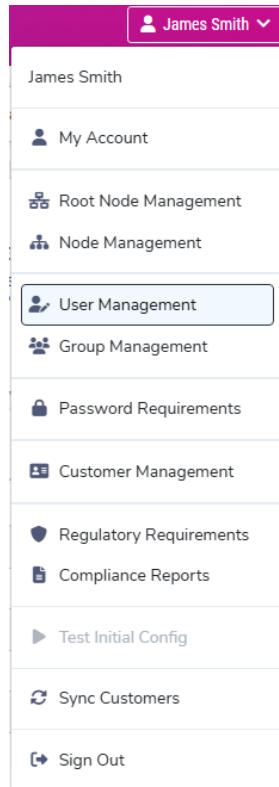
uSecure

Activation Codes

Email Settings

User Management

To set up the users for Relay Unify, select User Management from one of two locations on the main uSetup page. One is the profile dropdown tab. The second is View Users from the home page. This is for Relay Unify users using all programs **except Relay Unify Print Manager**.

A screenshot of the 'USER MANAGEMENT' form. At the top right is a 'New User' button. Below it is a 'USERS & GROUPS' section with the text 'Manage uSetup Users, Groups, Membership, & Permissions' and two buttons: 'View Users' and 'View Groups'. The main form area has a 'User Details' tab. It contains fields for 'First Name', 'Last Name', 'Username', and 'Email Address'. Below these is a 'Description' field. The 'INITIAL PASSWORD' section has a blue box with a warning icon and text: 'The password you specify below will be temporary. The user will be prompted to change their password when they first login to the system.' Below this is a 'Password' field with an eye icon. There is an 'Active' checkbox. The 'MANAGE APPLICATION ACCESS' section has four checkboxes: 'Access uSetup', 'Access Smart Delivery Dashboard', 'Access uControl', and 'Access uCompose'. At the bottom are 'Save' and 'Cancel' buttons, and a 'View History' button on the right.

Username – This is used to login to each program.

Password – This is used to login to each program.

Change Password – Click this button to change the user's password. This must satisfy the user password settings under Admin Profile dropdown > Password Requirements.

First Name/ Last Name – Enter the user's first and last name.

Description – Give the user's profile a description.

Active – If this is checked, the user can login; if it is unchecked the user is disabled and cannot log in.

Manage Application Access –Check these boxes to allow the user access to the different applications (uSetup, Smart Delivery, uControl, and Relay Unify uCompose).

Set Locations:

Locations are setup under Global Settings > Locations.

Once locations are set up, they are available to all users on that server.

Description—Give your location an easily identifiable name.

Enabled—Check this box if you want to be able to use this location.

Report Printer—Once you have printers set up and linked to your server, they will show in this drop down to choose for your Location set up.

LOCATION MAINTENANCE

Global Settings

LOCATION CONFIGURATION

ID	DESCRIPTION	ENABLED	
1	Black & White	Y	
2	Color	Y	
3	Nashville	Y	
4	New York City	Y	
6	Denver	Y	
11	USA - Nashville	N	
14	California	Y	
15	Atlanta	Y	
17	Orlando	Y	

Showing 1 to 9 of 9 entries

Previous1Next

+ Add Location

View History

Location Maintenance

Description

Enabled

Report Printer

SaveClose

Work Calendar

Under the Global Settings tab, choose the SLA Management tab.

This is used for calculating SLAs. If a day is not marked as a workday, then it will not be used in calculating when the job is due to be completed.

All days are set as workdays by default. To mark a day as No (not a workday), click on the date and it will change to having a blue line underneath it.

You can mark days one by one, or you can now choose Annual Days Off at the top of the menu. You can even set a date range of consecutive dates for days off.

◀ Back to Dashboard

Monitor Services

Processes & Directories

Business Classifications

Consumables

Print Settings

Postal Settings

SLA Management

Email Tracking (Mandrill)

Locations

Ticket Templates

Reports

Web Settings

uDeliver

uCampaign Management

uSecure

Activation Codes

Email Settings

MARK ANNUAL DAYS OFF

☐ Monday

☐ Tuesday

☐ Wednesday

☐ Thursday

☐ Friday

☐ Saturday

☐ Sunday

ADD DATE RANGE OFF

Start Date

mm/dd/yyyy

End Date

mm/dd/yyyy

+ Add Range

WORK CALENDAR

< 2023 2024 2025 2026 2027 >

January

February

March

April

May

June

Su Mo Tu We Th Fr Sa

1 2 3 4

5 6 7 8 9 10 11

12 13 14 15 16 17 18

19 20 21 22 23 24 25

26 27 28 29 30 31

Su Mo Tu We Th Fr Sa

1

2 3 4 5 6 7 8

9 10 11 12 13 14 15

16 17 18 19 20 21 22

23 24 25 26 27 28

Su Mo Tu We Th Fr Sa

1

2 3 4 5 6 7 8

9 10 11 12 13 14 15

16 17 18 19 20 21 22

23 24 25 26 27 28 29 30 31

Su Mo Tu We Th Fr Sa

1 2 3 4 5

6 7 8 9 10 11 12

13 14 15 16 17 18 19

20 21 22 23 24 25 26

27 28 29 30

Su Mo Tu We Th Fr Sa

1 2 3 4 5

6 7 8 9 10 11 12

13 14 15 16 17 18 19

20 21 22 23 24 25 26

27 28 29 30 31

Su Mo Tu We Th Fr Sa

1 2

3 4 5 6 7 8 9

10 11 12 13 14 15 16

17 18 19 20 21 22 23

24 25 26 27 28 29 30 31

Su Mo Tu We Th Fr Sa

1 2 3 4 5 6

7 8 9 10 11 12 13

14 15 16 17 18 19 20

21 22 23 24 25 26 27

28 29 30

Su Mo Tu We Th Fr Sa

1 2 3 4

5 6 7 8 9 10 11

12 13 14 15 16 17 18

19 20 21 22 23 24 25

26 27 28 29 30 31

Su Mo Tu We Th Fr Sa

1

2 3 4 5 6 7 8

9 10 11 12 13 14 15

16 17 18 19 20 21 22

23 24 25 26 27 28 29 30

Su Mo Tu We Th Fr Sa

1 2 3 4 5 6

7 8 9 10 11 12 13

14 15 16 17 18 19 20

21 22 23 24 25 26 27

28 29 30 31

Save Settings

View History

Pitney Bowes

Relay Unify Workflow Manual to Setup and Process Jobs User Guide

January 2025

Page 20 of 209

Processes & Directories

Under the Global Settings tab, select Processes & Directories. These are various directories and settings that globally change the workflow of jobs through Relay Unify. The Max Processes number represents the instances that can run per machine/server. This can be changed in the database. Please contact Pitney Bowes Support to assist in changing items in the Processes directory.

Submit

Directory – This should not be edited after it is set up in the initial installation of Relay Unify. This is the UNC path to the root of the Relay Unify processing directories. This should be [\\server\Submit](#) and this entry should be identical to FTPSubmit, WebSubmit, and EmailSubmit directory entries.

DefImgDir – The UNC path to the IMAGES/ folder. This is the home folder for relative image paths. By default, this is located in the SUBMIT/ folder.

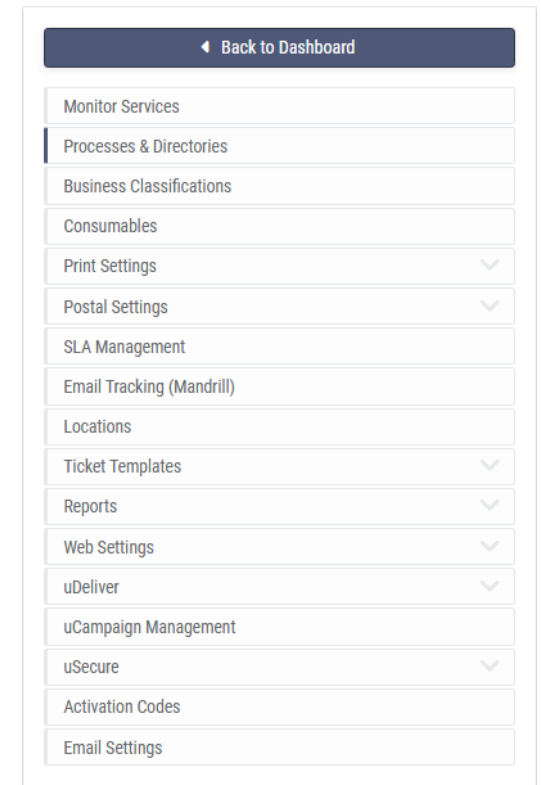
DefRTFDir – The UNC path to an optional, separate RTF folder. This is the home folder for relative RTF file paths. By default, this is blank and falls back to the directory specified by "DefImageDir". If this option is used, Pitney Bowes recommends creating an "RTFS/" directory in the SUBMIT/ folder.

FTPSubmit

Directory – This should not be edited after it is set up in the initial installation of Relay Unify. The UNC path to the folder where data received into Relay Unify via the FTP process (Relay UnifySubFTPSERVICE) will be renamed and moved to for processing. By default, this is located in the SUBMIT/DATA/ folder. NOTE\: this is not the folder where files are received via FTP; that option is set in "Submission Type Maintenance". This should be [\\server\Submit](#) and this entry should be identical to FTPSubmit, WebSubmit, and EmailSubmit directory entries.

Wait Time – The number of seconds the Relay Unify Submission FTP Service waits before polling the FTP submission directories for new data files. If a data file has not changed size after this time, it will be received into Relay Unify and processed.

ErrorLog



ErrorEmail – The email address to send internal Relay Unify processing error messages. This email is not customizable and will be sent when a submission is in Error status.

Breakpack

Directory – This should not be edited after it is set up in the initial installation of Relay Unify. This is the directory to use for any temporary processing files.

Wait Time – The number of seconds to wait before processing a new submission. This ensures a unique Relay Unify file name with a unique date timestamp. By default, this is set to 1 second.

MapDir – This should not be edited after it is setup in the initial installation of Relay Unify. The UNC path to the MAPS/ folder. This is the home folder for the relative map paths in Submission Type Maintenance. By default, this is located in the SUBMIT/ folder.

CheckRTF – The default is N or blank which results in not checking RTF files in Breakpack. If Y, it will check the RTF files during Breakpack and generate an error in Breakpack if the RTF file does not exist.

PROCESSES & DIRECTORIES Global Settings

PROCESS SETTINGS

ID	NAME	VALUE	PROCESS NAME	MAX
14	AMLocation	C:\Program Files (x86)\Pitney Bowes\ConnectRight Mailer Unify\	AddrCleanse	1
14	WaitTime	30	AddrCleanse	1
12	CheckRTF		BreakPack	4
12	Directory	E:\Uluro\Programs	BreakPack	4
12	MapDir	\\TransQa2\submit\maps\	BreakPack	4
12	WaitTime	1	BreakPack	4
38	AutoTrim	True	DelimitedParser	2
20	Directory	\\TransQa2\Submit\Data\	EmailSubmit	1
20	WaitTime	14	EmailSubmit	1
11	ErrorEmail	ttobin@transfrm.com	ErrorLog	0
10	Directory	\\TransQa2\Submit\Data\	FTPSubmit	1
10	WaitTime	1	FTPSubmit	1
30	HBDelay	60	GlobalHeartbeat	1

[View History](#)

Print

WaitTime – The number of seconds to wait between running print jobs. By default, this is set to 10 seconds.

Directory – This should not be edited after it is set up in the initial installation of Relay Unify. The UNC path to the folder where print jobs are created via the Relay Unify Print Process Service (Relay UnifyPrintService). This is the home path for the relative print file paths in uPrint and Print Configurations.

Spoolsize – The maximum file size (in bytes) for print files. Pitney Bowes recommends a value of "4026532000" (3.75 GB).

SplitFiles – This tells the Print program to split files if printing to a File Printer.

InsData – When enabled by setting the value to 1, this causes an IDF file to be created after printing. The INSDIR value must also be set.

INSDIR – This is the full UNC path to the directory for the IDF file. The IDF file is enabled using the InsData setting.

SaveTIF – This enables saving page 1 of each document during printing. To enable this setting, use a value of 1. The TIFDIR value must also be set.

TifDIR – This is the directory for the 1st page tiff image. The name of the tiff will be set to the value of TifName.

TifName – This is the template for the 1st page tiff image file name. The name may contain fields/variables in the format <#fieldname>.

JobBanner – If "InsertBann" or "InsertSep" is enabled, this determines which sort of Print Banner or Job Banner to use. This number must match the number entered in the BannerHeader. BHBannerType.

Valid values:

-1: Enables inserter separator pages. Only used with "InsertSep".

1: Default, predefined print banner page for DRS system. Only used with "InsertBann".

2: Custom print banner page RTFs from SQL. Only used with "InsertBann".

All other values have no effect.

JBCnt – The number of copies of the Print Banner or Insert Separator to print. By default, this is set to "1".

ErrorEmail – This email is not customizable and will be sent when a print job is in Error status.

APJ_PDF – When this is Y a Print Job PDF will be created after the Print. The Print Job PDF contains the List of submissions, input file, doc count, sheets, and customer. This is only when Print Configurations are used.

APJ_MVJT – When this is Y the Print Job ticket is moved from the RPT directory to the directory with the Print Files. This is only when Print Configurations are used.

DisAppImgm – When this is Y the Append Image commands will have the caching (PCL or Postscript) removed.

PausePrint – When this is Y the Print Job will be paused after ending a spool file. This only occurs when spooling and SPOOLSIZE > 0. The print has to be restarted manually.

ShowStatus – When this is not N the rpprintapp.exe will have a progress bar to show status.

WaitOnSpl – When this is Y rpprintapp.exe will wait for Spooling and Printing to finish before starting a new print. This only occurs when spooling and SPOOLSIZE > 0.

DefWaitOnS – Number of seconds to wait for Spool file to finish printing before starting next print. Max is 3600 secs. Only waits if WaitOnSpl or when Print Configuration is used, and spooling is enabled.

InsertBann – Enter a Y to enable Banner pages. This will print one banner page at the beginning of the print job. The paper type and media/tray for the print banner are controlled in the "Print Banner" page number in the "Output Page Definition" command in Relay Unify Compose. Pitney Bowes recommends using Insert Banner with individual print jobs split on a custom filter in a Print Configuration. This setting is incompatible with "InsertSep".

PROCESSES & DIRECTORIES Global Settings

PROCESS SETTINGS

ID	NAME	VALUE	PROCESS NAME	MAX
13	BannerPos	F	Print	1
13	COPYFILES		Print	1
13	DefWaitOnS		Print	1
13	Directory	\\TransQa2\Submit\PR	Print	1
13	DisAppImgm		Print	1
13	DISPDFNUP		Print	1
13	DRSFE	Y	Print	1
13	DUPJOB	Y	Print	1
13	ErrorEmail		Print	1
13	FileBanner	Y	Print	1
13	InsData	1	Print	1
13	INSDIR		Print	1
13	InsertBann	Y	Print	1

View History

Valid values:

Y: Enable the Print Banner pages.

N: Disable the Print Banner pages.

All other values are considered "N".

InsertSep – This will print one separator page every time a specified field changes value. Enables the Inserter Separator pages in a print job. The paper type and media/tray for the insert separator are controlled in the "Print Banner" page number in the "Output Page Definition" command in Relay Unify Compose. Inserter Separator pages are triggered by the Custom Filter option in uPrint or Print Configurations. Unless you have a specific need to keep print output in a single print job, Pitney Bowes recommends using the Inserter Banner instead. This setting is incompatible with "InsertBann".

Valid values:

Y: Enable the Inserter Separator pages.

N: Disable the Inserter Separator pages.

All other values are considered "N".

DRSFE – DRS Front End. When Y and InsertBann = Y then DRS is assumed. Custom Banners override this setting. Causes the Output to contain 1 in the DRS barcode to indicate DRS Front End enabled.

FileBanner – Enter a value of Y to enable printing the banner page at the beginning of each print file within a print job.

Valid values:

N: Print the Print Banner page only on the first file of a print job regardless of any splitting. (e.g. "PRT_A.ps", "PRT_B.ps", "PRT_C.ps",...).

Y: Print the Print Banner page on all files of a print job, including print job split across multiple files (e.g. "PRT_A.ps", "PRT_A.ps_00002", "PRT_A.ps_00003", "PRT_B.ps", "PRT_C.ps", "PRT_C.ps_00002", ...).

All other values are considered "N".

COPYFILES – When Y, the Mail.Dat files are moved to MLDatPath. Other reports are moved to MVRPTPath or to same path as the IDF file if MVRPTPATH is blank.

You will not see MLDatPath or MVRPTPath unless COPYFILES is Y and at least one Print Job has been run.

PPP – When this is Y a PPP file will be created.

AllDocsPQ – Allows turning off writing Document records to Relay Unify Print Manager. Must be set to N to turn off. If blank or of any value other than Y the documents records are written to Relay Unify Print Manager. When N, only the first document in the Print is written to Print Queue. Setting to N will save time during printing because only the 1st document will be written.

NONPM – If this is enabled with a Y, submission types that use Relay Unify Print Manager settings to create print jobs will process through Relay Unify Print Manager status straight to Print Complete status.

DUP JOB – When Y the original Print Job ID will be used on Duplicate Reprint Jobs. This means that any output on the document will use the original Print Job ID.

PJTWFile – To enable this, enter a value of Y. To use this feature, the NONPM setting must also be enabled with a value of Y. This will create the Print Job Ticket as one of the PDF print files within the print job. This is for output using Native PDF for non-Relay Unify Print Manager jobs.

NupSep – Print the Inserter Separator pages on an n-up job (if Inserter Separator pages are enabled with "InserterSep"). If Inserter Separator pages are used, Pitney Bowes recommends setting this to "Y". This enables n-up prints but does not apply to Relay Unify Native PDF output. GroupFieldValue is the Field that changes to cause a Separator page. If GroupFieldValue is blank, then a separator page will not print.

Valid values:

Y: Print the Inserter Separator pages on an n-up job. The Inserter Separator page will print on a new, separate sheet, and the n-up calculations will start over for the next set of documents.

N: Print the Inserter Separator pages but force the print job to be 1-up (as if n-up was never enabled in Relay Unify Compose).

All other values are considered "N".

PDFBefore – The UNC path to a PDF file (can be more than 1 page) that will appear before the statements in a print job and after the Print Banner (if the Print Banner is enabled with "InsertBann").

PDFAfter – The UNC path to a PDF file (can be more than 1 page) that will appear after the statements in a print job and before the Print Banner if the Print Banner is enabled with "InsertBann").

BannerPos – This determines the location where the Print Banner page prints in a print file.

Valid values:

F: Print the Print Banner page at the front of the print file as the first page. The Print Banner will print before any PDF listed in "PDFBefore". Setting the "Print in Reverse Order" checkbox in the "N-Up Docs Definition" command in Relay Unify Compose will cause the Print Banner page to print at the end of the print file.

E: Print the Print Banner page at the end of the print file as the last page. The Print Banner will print after any pdf file listed in "PDFAfter". Setting the "Print in Reverse Order" checkbox in the "N-Up Docs Definition" command in Relay Unify Compose will cause the Print Banner page to print at the beginning of the print file.

B: Print the Print Banner page at both the front and the end of the print file as the first and last pages.

All other values are considered "F".

DISPDFNUP – If Y, this will restore the existing PDF Print of Nup maps to non-Nup. This only applies to PDF output. A map that is designed to be n-up, will no longer print n-up when the print file is created.

UNPDFINDX – Set this to Y to enable. This will index the starting page of the print file for each docID and the number of pages in the document. This is for indexing PDF files generated for Relay Unify Print Manager.

REBUILDFL – If Y, this will rebuild the filename using a Save To DB field from the first document in the print file. This is to be used when there are multiple print files within a print job and the filename uses a Save to DB field.

USEMRGDOC – If Y, merged documents will be in the same print file. If this is not enabled, the merged documents will be treated as separate documents when printed. This is used when manually printing from uPrint.exe.

PJTinFile – If Y, the Print Job Ticket will be the first sheet of the first print file in a print job. This setting is only to be used with Relay Unify Print Manager. The PJT will always be output duplexed and Landscape. The PJT will be followed by any Banner Pages, PDF Before, and Separator Pages. This setting will override PJTforPM and PJTWFile settings by setting them to 'N' while printing.

PJTforPM – If Y, the Print Job Ticket will be created as a file if the Print Job is created by a Print configuration (PM is enabled on the submission type).

AddrCleanse

WaitTime – The number of seconds to wait between address cleansing jobs. By default, this is set to 1 second.

PreProcess

Directory – This should not be edited after it is set up in the initial installation of Relay Unify. The local path to the PREP/ folder where the preprocess program and scripts are kept. This is the home folder for the relative preprocess paths in Submission Type Maintenance. By default, this is located in the SUBMIT/ folder.

WaitTime – The number of seconds to wait between running preprocess jobs. By default, this is set to 1 second.

Presort

WaitTime – The number of seconds to wait between presort jobs. By default, this is set to 1 second.

WEBSubmit

Directory – The UNC path to the folder where data received into Relay Unify via the web process (Relay UnifySubWebService) will be renamed and moved to for processing. By default, this is located in the SUBMIT/DATA/ folder. NOTE\: this is not the folder where files are received via web; that option is set in "Submission Type Maintenance". This should be [\\server\Submit\](#) and this entry should be identical to FTPSubmit, WebSubmit, and EmailSubmit directory entries.

Wait Time – The number of seconds the Relay Unify Submission Web Service waits before polling the web submission directories for new data files. If a data file has not changed size after this time, it will be received into Relay Unify and processed.

PostProcess

Wait Time – The number of seconds to wait between running preprocess jobs. By default, this is set to 5 seconds.

Directory – The local path to the PostProcess/ folder where the post-process program and scripts are kept. This is the home folder for the relative post-process paths in Submission Type Maintenance. By default, this is located in the SUBMIT/ folder. If the setting is blank, then the directory will be set to the Path of the Relay Unify Post Processing Service. This can be used to set an alternate directory.

EmailSubmit

Wait Time – The number of seconds the Relay Unify Submission Email Service waits before polling the email submission directories for new data files. If a data file has not changed size after this time, it will be received into Relay Unify and processed.

Directory – The UNC path to the folder where data received into Relay Unify via the email process (Relay UnifySubEmailService) will be renamed and moved to for processing. By default, this is located in the SUBMIT/DATA/ folder. NOTE\: this is not the folder where files are received via email; that option is set in "Submission Type Maintenance". This should be [\\server\Submit](#) and this entry should be identical to FTPSubmit, WebSubmit, and EmailSubmit directory entries.

Create a New Customer

To create a new customer/client, click on the Add Customer button.

CLID – This is the number assigned to the client in Relay Unify. It will automatically increment as customers are added.

Customer – The name of the client is the only required field and must be unique.

External Customer # Field Name – Double click to edit this field. It can be renamed to anything you want to link clients from an external system to Relay Unify. This number will appear throughout the pages as a reference in addition to the CLID.

Customize Field Name

Changing the Ext Customer Number field description will change this field description for every customer

Field Name

Internal#

Save

Cancel

Once the customer information has been entered click Save. The customer will now appear in the list of all customers on the Manage Customers page.

BUSINESS CLASSIFICATION

Manage Business Classifications

Global settings configuration

Industry

No Classification

Status

Active

CUSTOMER DETAILS

Customer Name

Pitney Bowes

Transqa2 Internal#

(edit)

Address 1

3001 Summer Street

Address 2

Address 3

City

Stamford

State

Connecticut

Postal Code

06926

Country

USA

Email Address

pb@pb.com

Contact

Support

Phone

844-256-6444

Mobile

Fax

CUSTOMER EPAF

	COMPANY	NAME	CITY	STATE	PDOCID	LISTID	EXPIRE DATE
☐	Transformations Inc	Wayne Boyte	Brentwood	TN	13788	26043	1/13/2026 12:00:00 AM
☐	Transformations Inc	Wayne Boyte	Brentwood	TN	13788	26042	1/13/2026 12:00:00 AM

Save

Cancel

View History

uSetup Main Window

Search – This can be used to search for a customer easily. Enter text then press Enter to see the customer list reflect the filter. It will search all columns for the text entered.

Show Deleted/ Inactive Customer – If this is checked, the deleted customers will appear in the list of customers. By default, Active and Inactive customers are displayed.

The columns can be sorted in ascending order by clicking on the heading of a column.

MANAGE CUSTOMERS

All Customers

CUSTOMERS

☐ Include Deleted/Inactive Customer

Search:

#	CLID	NAME	CITY	STATE	ZIPCODE	STATUS	WEBDB	URL
	5109	Aug Smoke Test	Franklin	TN	37067	Active		
	5110	CRM Integration Testing	Caledonia	MI	70122	Active		
	5115	Pitney Bowes	Stamford	CT	06926	Active	Web4	web4qa5115.transqa2.trans.loc
	5118	Web4 Initiating Testing 02		AL		Active	Web4	web4qa202.transqa2.trans.loc
	5119	Web4 Initiating Testing 03		AL		Active	Web4	web4qa2.transqa2.trans.loc
	5124	March 06 Testing	Franklin	TN	37067	Active	Web4	web4demo.transqa2.trans.loc
	5125	March Web4 Testing	Franklin	TN	37067	Active	Web4	cyweb4.transqa2.trans.loc
	5126	JohnDoe		AL		Active		
	5127	March 26 Testing - Ultimate	Franklin	TN	37067	Active		

Showing 2,691 to 2,699 of 2,699 entries

Previous

1

–

266

267

268

269

270

Next

+ Add Customer

Customer Level Settings

General Information – This is where the customer set up begins with name and information.

Contacts – This is where you can add additional contacts for the customer.

Contracts – This is all your contract information with that customer.

Notes – This is for making notes about business rules, meetings, or other customer information.

Access Permissions—This is where you see and grant users' permission to access this customer.

Email Configuration – This is where email credentials are set up for the customer.

Mandrill Settings—This is where your email tracking details get entered, or you can pull it from your preset Mandrill Settings in Global Settings.

SMS Settings – This is where the SMS credentials for Relay Unify uDeliver are configured.

IVR/ Voice Settings – This is where the IVR credentials for Relay Unify uDeliver are configured.

Pregeneration Report – This is where you set up your report settings for this customer, which can also be pulled in from Global Settings if applicable. This will generate a PDF if it is set up.

Template Fields – This is where customer level values can be entered as template fields to be used within template maps across multiple customers.

License –This is where you request a license for Relay Unify uSecure from Pitney Bowes for the customer. Or you can also import an existing one.

Relay Unify uSecure Configuration—Here is where you turn on your protection and choose how you want your file to expire, if at all. You can also set a date range.

Challenges—Effectively a Q+A to set up for access to certain protected files. This can be set up as well in Global Settings and added to any customer with Relay Unify uSecure.

[◀ View Customer List](#)

Customer Information

General Information

Contacts

Contracts

Notes

Access Permissions

Credentials

Email Configuration

Mandrill Settings

SMS Settings

IVR / Voice Settings

Pregeneration Report

Template Fields

uSecure Settings

License

uSecure Configuration

Challenges

uProtect

Audit Info

Submission Types

Web Portal Setup

- Relay Unify Protect**—This is where you will set up shredding data, and customer permissions for Relay Unify uSecure. Also generate your protected file.
- Audit Info**—Here will be all of your audit files for Relay Unify uSecure.
- Submission Types**—This is where all of your submissions for this customer will be held.
- Web Portal Setup**—This is where you set up and brand the web portal for the customer.

Notes

Enter a note here and click the **Save** button. It will be added to the notes tab with a timestamp.



Tips:
These notes cannot be removed so be careful what you enter here!

Add Note

Note

Save

Cancel

Contracts

Contract Number - This can be any number you would like to assign to that contract.

Status – This can be Closed, Open, or Pending to help organize the multiple contracts that may be entered here.

Description – Enter text to identify the contract easily.

Start Date – This is the day it began.

Expire Date – This is the day the contract is no longer valid.

Add Contract

Contract Number

Status

Open

Description

Start Date

mm / dd / yyyy

Expire Date

mm / dd / yyyy

Save

Close

Email Setup

Outgoing

Host Server – This is the mail server.

Port – Enter the port. Default is 25.

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

Password – This is the password for the mail server.

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

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

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

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

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

Enable SSL – If this is checked, it forces SSL for connecting to an AWS (Amazon Web Server) for sending email.

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

Once setup, click test, then Save.

MANAGE EMAIL CONFIGURATION

IMPORT SETTINGS FROM CUSTOMER

Load

OUTGOING SERVER SETTINGS

Host Server *

Port *

25

User ID *

Password *

From Email Address *

From Name *

Reply To Email

CC Email

Blind CC Email

Test Server Settings

Enable SSL

INCOMING SERVER SETTINGS

Host Server

Port

User ID

Password

Forward To Email

Forward Emails

SQL Email Profile

Save

View History

Warning

Any existing emails or events that have not process may process after enabling email for this customer. Is this OK?

Yes

No

If this is set up after email events have been created, there will be a warning when saving the credentials. If the user clicks Yes, the previously created emails will be sent. If No, then the email credentials will not be saved.

Incoming

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

Host Server – This is the mail server.

Port – Enter the port.

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

Password – This is the password for the mail server.

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

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

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

Tracking

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

Enter the credentials received from Mandrill:

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

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

The screenshot shows a web interface for configuring email tracking with Mandrill. The form is titled "EMAIL TRACKING (MANDRILL)" and includes a "5115 Pitney Bowes" label in the top right corner. The form contains the following fields and options:

- ☒ Use Global Settings
- API Key (text input)
- Web Hook Key (text input)
- Dedicated IP Address ID (text input)
- Custom Quota (text input with value "0" and an information icon)
- Charge (text input with value "0" and a dropdown menu set to "Thousand")
- From Email Address (text input)
- Save button (bottom left)
- View History button (bottom right)

These settings can be setup globally as well under Global Settings > Email Tracking (Mandrill).

EMAIL TRACKING (MANDRILL)

Global Settings

SETTINGS

API Key

iPTmpQQy8JaJct_iIJKBLQ

Web Hook Key

a_v9zzhvNGZ5ia2SgtC3ww

Dedicated IP

Custom Quota

0

Charge

0.00

Status

per 1000

☒ Enable Tracking

Save

View History

Contacts

Enter the name and address of contacts for this customer. The name is the only required field when adding a contact.

Add Contact

Contact Name

Email Address

Address 1

Address 2

Address 3

City

State

Postal Code

Country

Phone 1

Phone 2

Fax

Save

Close

Create a New Submission Type

From the main page of the website, you can choose View Customers from the Manage Customers tab. Then choose your customer and go to Submission Types from the list on the left. There you'll be able to Add Submission Type, or choose from pre-existing submissions, or even Copy similar submissions and edit them within. The bottom of the list will tell you how many total entries you have for the selected customer.

MANAGE SUBMISSION TYPES

5115 Pitney Bowes

SUBMISSION TYPES

Search:

	SUB ID	SUBMISSION TYPE	DESCRIPTION	REGULATIONS	STATUS	
	34222	PB_Camp	PB Campaign		Inactive	
	34218	PB_Gas	Pitney Bowes Gas		Active	
	34223	RU_Energy	Relay Unify Electric		Inactive	
	34221	RU_Water	Relay Unify Water		Inactive	

Showing 1 to 4 of 4 entries

Previous

1

Next

+ Add Submission Type

Copy

From any submission type under the selected customer, click the Add Submission Type button to create a new submission for the client.

There are 4 required fields to create a submission type.

- Submission Type
- Description
- Map Name
- FTP Path

Submission Type - Enter a name for the submission type. There is a 10-character maximum for this field.

Description – Enter a description for the submission type. This field has a maximum of 40 characters.

Map Name – Enter the path of the map including the name of the map. This field uses the relative path of the maps directory in the Submit directory.

If the full path to the map is:

[\\server\SUBMIT\MAPS\Relay Unify Training\Relay Unify Energy.nmp](#) then the Map Name would be:

Relay Unify Training\Relay Unify Energy.nmp

If the data file used to build the map, when the map was last saved will be loaded in if it can be accessed. If not, you will need to load in the appropriate data file.

FTP Directory – Check the box and enter the full path to the folder that the data file will be placed in. This should be in the format: [\\server\Submit\FTP\CustomerName\SubmType\](#). There is no size limit for the files uploaded to Relay Unify using FTP/SFTP.

The screenshot shows the 'Add Submission Type' form. At the top, there are two input fields: 'Submission Type Id' and 'Description', both highlighted with red boxes. To the right of these is a 'Status' dropdown menu set to 'Inactive'. Below these is a section titled 'REGULATORY ACCESS' with a 'NONE' button. Further down are 'Location' and 'Submission Priority' dropdowns. The 'INCOMING DATA (FILE RECEIPT)' section contains three rows: 'FTP' (checked), 'Web', and 'Email', each with a corresponding directory input field. The 'FTP' row is highlighted with a red box. Below this is the 'Map Name' section, which includes a 'Preprocess Program' input field highlighted with a red box, and a 'Postprocess Program' input field. At the bottom, there is a checkbox for 'Automatically create a Job (job id assigned in AutoJob Status)'. The 'SUBMISSION EXPIRATION' section has a 'Reset Expirations' button and a text box for specifying the number of days. At the very bottom are 'Save' and 'Cancel' buttons.

WEB Directory – Check the box and enter the full path to the folder that the data file will be placed in. This should be in the format:

[\\server\Submit\WEB\CustomerName\SubmType\](#). There is a size limit of 1G for the files uploaded to Relay Unify using the Web Upload setting.

Email to Directory

Email Directory – Check the box and enter the full path to the folder that the data file will be placed once it is retrieved from the email. There is a size limit of 8MB for the files uploaded to Relay Unify using email.

The incoming email server settings/credentials (POP not IMAP) must be entered in the Email Setup for the client. It is recommended to have an email specifically for this; the inbox will be monitored each time an email is delivered to that account. The RPREcvemail program will process all email for the account and delete the email from the email server.

The subject of the incoming email must have "CLID=XX SUBID=XXX" in it with the appropriate values. The files in the email will be placed in that client and submissions email directory to be picked up by Relay Unify.

The data should be an attachment that is within the 8MB limit. No information is needed in the body. If there is information in the body, it will be ignored. No signatures or other attachments should be included in the email.

Once those items have been entered, you can save the submission type. The Status of a submission type is Inactive initially, meaning the File Receipt directories will not be monitored for files. Change the status to Active and Save.

The customer name, ID, and submission name and ID from the creation of the client will be listed across the top.

The submission type ID will be listed from the initial save of the submission type.

GENERAL INFORMATION

5115 Pitney BowesQ 34218 PB_Gas⋮

Submission TypePB_Gas

DescriptionPitney Bowes Gas

StatusActive

REGULATORY ACCESS

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

NONE

LocationConnecticut

Submission Priority2 Days

Cleansing

Click on the blue Manage Cleanse Types button within the submission type to edit the global settings. These can also be set up and edited under:
Global Settings > Postal Settings > Cleansing Templates.

Select the Cleanse Type for this submission type from the dropdown list of what has been set up globally.

CLEANSE TYPE & PRESORT

Manage Cleanse Types

Global settings configuration

Manage Presort Types

Global settings configuration

Cleanse Type

Presort Type

☒ Enable Presort Labels

Manage IMB Configuration

Global settings configuration

ADDRESS IMB

IMB

☐ Overrides Default

Service Type

Barcode Id

00 DEFAULT / NO OEL INFORMATION

RETURN IMB

IMB

☐ Overrides Default

Service Type

Barcode Id

00 DEFAULT / NO OEL INFORMATION

Save

View History

For more information on how to set up a cleansing template please reach out to your Pitney Bowes representative.

POSTAL SETTINGS - CLEANSING TEMPLATES

Global Settings

Cleansing Settings

NCOA Credits

Credentials

CLEANSING CONFIGURATION

ID	DESCRIPTION	CLEANSE PROGRAM	SET CASING	
18	34952 Testing	Connect Right Mailer	T	
26	Jan01	Connect Right Mailer		
27	CRM CASS ONLY	Connect Right Mailer		
28	CRM NCOA	Connect Right Mailer		

Showing 11 to 14 of 14 entries

Previous

1

2

Next

+ Add Cleanse Type

View History

Presort

Click on the blue Manage Presort Types button within the submission type to edit the global settings. These can also be set up and edited under:
Global Settings > Postal Settings > Presort Templates.

Select the Presort Type for this submission type from the dropdown list of what has been set up globally.

CLEANSE TYPE & PRESORT

Manage Cleanse Types

Global settings configuration

Cleanse Type

Manage IMB Configuration

Global settings configuration

ADDRESS IMB

IMB

Overrides Default

Service Type

Barcode Id

00 DEFAULT / NO OEL INFORMATION

RETURN IMB

IMB

Overrides Default

Service Type

Barcode Id

00 DEFAULT / NO OEL INFORMATION

Save

View History

Manage Presort Types

Global settings configuration

Presort Type

Enable Presort Labels

For more information on how to set up a presort template please reach out to your Pitney Bowes representative.

POSTAL SETTINGS - PRESORT TEMPLATES

Global Settings

Presort Settings

Presort Labels

PRESORT CONFIGURATION

ID	PROGRAM NAME	DESCRIPTION	TEMPLATE	MAIL.DAT	SEND IMB	
37	CRM Cleansing and Presort	CRM CLEANSEPRESORT NCOA PRESORT AUTO	4541332	False	False	

Showing 21 to 21 of 21 entries

Previous

1

2

3

Next

+ Add Presort Type

View History

Consumables: Forms and Envelopes

These settings will be used during Presort.

Click on the blue Manage Forms/ Manage Envelopes buttons to edit the global settings. These can also be set up and edited under Global Settings > Consumables.

To create a new form, envelope, or insert, click the Add Consumable button.

Form ID – This will automatically increment as items are added.

Description – This will be the name that appears in the dropdown menus for you to select.

Type – Select whether it is a form, envelope, or insert. This selection will determine which dropdown menu it will be listed in to select for the submission type.

Weight/Thickness – Enter the values to be used during presort calculations for the mail pieces. The thickness should be calculated as if folded.

The screenshot shows the 'MANAGE SUBMISSION TYPE' interface with tabs for 'Forms & Envelopes', 'Additional Pages', and 'Inserts'. The 'Forms & Envelopes' tab is active, showing two sections: 'Manage Forms' and 'Manage Envelopes', both with 'Global settings configuration' buttons. The 'FORMS' section includes a 'Primary Form' dropdown, 'Weight' (oz) and 'Thickness' (in) input fields, and a 'Secondary Form' dropdown with similar input fields. The 'ENVELOPES' section includes a 'Regular Envelope' dropdown, 'Weight' (oz) and 'Thickness' (in) input fields, and a 'Return Envelope' dropdown with similar input fields. At the bottom, there are 'Save' and 'View History' buttons.

CONSUMABLES - FORMS							Global Settings
ID	DESCRIPTION	TYPE	WEIGHT	THICKNESS	ENVELOPE		
1	Standard 24 lb paper blank	F	0.160000	0.003800			
2	standard 24 C fold perf.	F	0.160000	0.003800			
3	standard 24 Z fold perf.	F	0.160000	0.003800			
4	standard 60 lb blank	F	0.472000	0.009000			
5	BRE (#9)	E	0.040000	0.033000			
9	Number 10 Window	E	0.040000	0.033000			
10	6 x 9	E	0.060000	0.040000			
11	9 x 12 flat no window	E	0.040000	0.080000			
12	9 x 12 flat with window	E	0.040000	0.080000			
13	PrePrinted Logo Form	F	0.018000	0.006000			

Showing 1 to 10 of 26 entries

Previous123Next

+ Add Consumable

View History

The address block positions for an envelope can now be edited in the Global Settings for Consumables. These dimensions are only used with Relay Unify Customize. Select an envelope or add a new one to see the Window Dimensions. If editing the dimensions for an envelope, the map(s) using the envelope will need to be republished in Relay Unify uCompose.exe to reflect the new dimensions.

Consumables Configuration

Description

Number 10 Window

TYPE

☐ Form

☒ Envelope

☐ Insert

Weight

0.040000

oz

Thickness

0.033000

in

Thickness should be calculated as if folded

WINDOW DIMENSIONS

From Left

0.900000

in

Width

2.200000

in

From Top

9.500000

in

Height

0.900000

in

Save

Close

Select the appropriate forms and envelopes for the submission type.

MANAGE SUBMISSION TYPE

5115 Pitney Bowes 34218 PB_Gas

Forms & Envelopes Additional Pages Inserts

Manage Forms Global settings configuration

Manage Envelopes Global settings configuration

FORMS

Primary Form
Standard 24 lb paper blank

Weight 0.160000 oz Thickness 0.007070 in

Secondary Form
Standard 24 lb paper blank

Weight 0.160000 oz Thickness 0.003800 in

ENVELOPES

Regular Envelope
Number 10 Window

Weight 0.040000 oz Thickness 0.033000 in

Return Envelope
BRE (#9)

Weight 0.400000 oz Thickness 0.033000 in

Save View History



Tips:

The Primary form is the first sheet, and the Secondary is all other sheets. Use the Additional Pages to set up forms for various sheets.

Click on the **Additional Pages** tab to add forms for specific sheets other than sheet one.
Click Add Page to add a new page detail. Select a previously setup Form. The weight and thickness will auto populate based on the selection. Click Save.

Add Additional Page

Form
Standard 24 lb paper blank

Weight 0.160000 oz Thickness 0.003800 in

Page Number
2

Thickness should be calculated as if folded

Save Close

To set up the inserts for each pocket, click on the **Inserts** tab.

Select the **Insert** field from the dropdown and enter the corresponding **Pocket** number.

Select the previously setup **Form** for the insert.

The weight and thickness will auto populate based on the selection. Click Save.



Tips:

The Consumables information for the envelopes, forms, and inserts will be available on the Consolidated Job Ticket as well as various reports.

Add Insert

Insert

Pocket

Form

Insert Ad

Weight

0.980000

oz

Thickness

1.543210

in

Thickness should be calculated as if folded

Save

Close

Create Email Events

Select the Email Notifications > General Settings tab within the submission type.

These can be used for:

- Submission has reached a status.
- Report Group Emails.
- End user emails to view documents as a PDF/URL on the web.

The number on the bottom left is the number of email events that have been set up for that submission type.

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

Event – Select the type of email event you wish to create. You can create one of each type:

- Breakpack Reports (contain the Submission Detail Report generated during Breakpack)
- Bulk PDF Email (an individual email for each record in the data file will be sent containing a PDF of the document)
- Cleansing Reports (this contains various auto print reports generated during cleansing)
- Daily Schedule (Appointment Date summary of all SMS/IVR messages sent that day)
- Presort Job Reports (this contains various auto print reports generated during presort)
- Presort Submission Reports (this contains various auto print reports generated during presort)
- Report Group (for custom-made report groups)
- Send End User PDF Email (end user notification for e-delivery)
- Send End User URL Email (end user notification for e-delivery)

EMAIL NOTIFICATIONS - GENERAL SETTINGS

Email Notification Settings

Email Notification Events

Email Tracking

Email Notification Events

Event

Breakpack Reports

To Email Addresses

pb@pb.com

Subject

Breakpack Reports

☐ HTML Format

 View HTML

Body

#CUSTNAME#

Submission:

#SUBNAME#

#SUBMID#

☐ Enable Tracking

AVAILABLE TAGS

#AllowDownloadCSV#
#ALLOWEDITEXCLUSIONS#
#AllowFutPay#
#AllowPartPay#
#AllowPay#
#AllowPayDet#

 Save

Close

- Send End User Relay Unify uSecure PDF Email
- Submission is Complete (triggered when the submission reached a status of Complete)
- Submission is in Error Status (triggered when the submission reached a status of Error)
- Submission is in Hold for Confirmation (triggered when a submission is created by a duplicate file that has already been processed with that MD5Sum)
- Submission is Ready for Approval (triggered when the submission reached a status of Awaiting Approval; for use with the web)
- Submission is Ready for Job Select (triggered when the submission reached a status of Job Select; for manually creating jobs)
- Submission is Received (triggered when the data file is initially picked up by Relay Unify and the submission is created)
- Submission Ready for Print (triggered when the submission reached a status of Ready to Print)
- Submission Rejected (triggered when the submission reached a status of Rejected; from web approval)

To Email Addresses – Enter the email addresses of the people that need to receive this email event. If multiples are being entered, separate them with a ; delimiter. For the events that this is grayed out, the email addresses will be pulled from the users' web profile.

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

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

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

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

Click Save.



Tips:

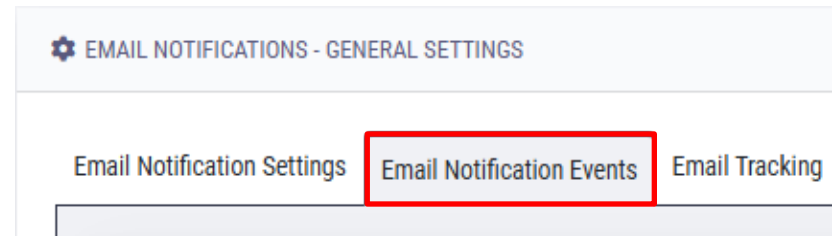
Any emails without tracking enabled that do not have PDF attachments are sent directly from SQL via Database Mail.

Any Emails with PDF attachments are created and sent by PDFEmail, a scheduled task, unless tracking is enabled. In that case, PDFEmail will create the emails and the UEmailTracking.exe service will send them.

Any email event that has the "Tracking" checkbox checked on it will attempt to send with the UEmailTracking.exe service by the Mailchimp Mandrill API.

Custom Email Event

A custom email event can be created for a submission type. This can be found under the Email Notifications > General Settings tab of the submission type in uSetup. Click on the Add Email Event button to set up the Custom Email event.



This email event is set up like the other email events that can be set up here. Once the Email event is saved initially the ID will be populated.

The trigger to send this email and the tags that can be used are customizable.

Add records to the EmailEventContexts table with the emaileventID and the ContextIDs of fields you will want replaced in the body of the email.

Note: If the replacement fields come from custom tables you will need to create a custom replacement context. This is done by adding a record to the ReplacementContexts table that points to your custom view and adding records to the ReplacementContextFields table for the fields in your custom view that you would like to use.

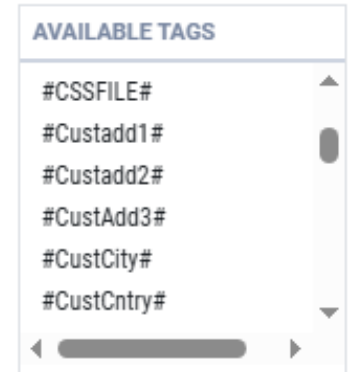
Create a Relay Unify uBridge job that creates a record in the event occurred table with the EmaileventID and the submid for which the event should be run.

A screenshot of the 'Email Notification Events' form. The form has a title bar 'Email Notification Events' with a close button (X). The form contains several fields: 'Event' (a dropdown menu with 'Custom' selected), 'Custom Name' (a text field with 'Custom Event Name'), 'To Email Addresses' (a text area with 'pb@pb.com'), 'Subject' (a text field with 'Custom Subject Title'), 'HTML Format' (a checkbox), 'View HTML' (a button), 'Body' (a large text area with placeholder text '#Custname#', '#CustStatus#', and '#Submid#'), 'Enable Tracking' (a checkbox), and 'AVAILABLE TAGS' (a list of tags with a scrollbar). At the bottom right, there are 'Save' and 'Close' buttons.

Additional Tags in Email Events

The ability to add data field tags to email events created using RunEvents has been added. The types of fields available for each email event are listed below. These tags can be added using the format #fieldname#. They are also listed in the Available Tags section on each respective email event.

System Email Events	Campaign	DocSave2DB	Documents	Jobs	SLA	SubCust
Breakpack Reports						X
Bulk PDF Email		X	X			X
Campaign Submission Canceled	X					X
Campaign Submission Complete	X					X
Campaign Submission Needs Approval	X					X
Campaign Submission Processed	X					X
Campaign Submission Received	X					X
Cleansing Reports						X
Custom				X		X
Daily Schedule						X
Guid Password Reset Email						X
HTML Batch Response Daily		X	X			X
HTML Immediate Response		X	X			X
IVR Batch Response Daily		X	X			X
IVR Immediate Response		X	X			X
Password Reset Notification						X
Presort Job Reports						X
Presort Submission Reports						X
Registration Key						X
Report Group						X
Reset Password Key						X
Send End User PDF Email		X	X			X
Send End User URL Email		X	X			X
Send End User Relay Unify uSecure PDF Email		X	X			X

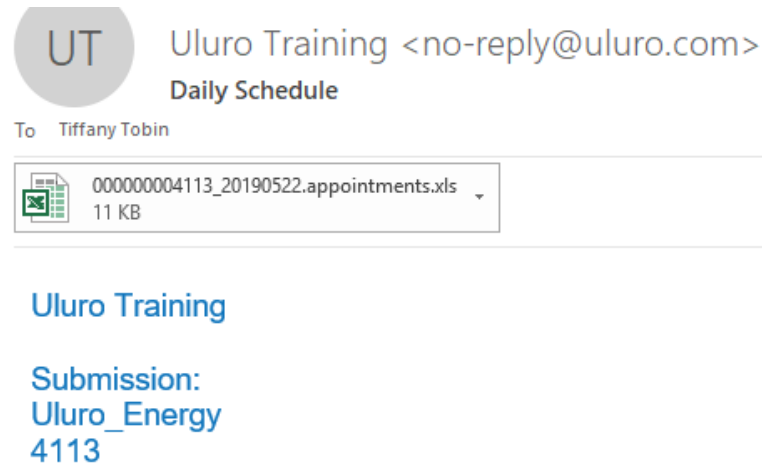


System Email Events	Campaign	DocSave2DB	Documents	Jobs	SLA	SubCust
SLA External Email					X	X
SLA Internal Email					X	X
SMS Batch Response Daily		X	X			X
SMS Immediate Response		X	X			X
Submission Is Complete				X		X
Submission is in Error Status				X		X
Submission is in Hold For Confirmation				X		X
Submission is Ready for Approval				X		X
Submission is Ready for Job Select				X		X
Submission is Received				X		X
Submission Ready for Print				X		X
Submission Rejected				X		X

Daily Schedule Email Event

The Daily Schedule Email Event can be set up using the **Daily Schedule Email** tab within the **Relay Unify uDeliver** dropdown tab.

This email event is specific to sending advanced notifications of upcoming appointments using SMS/IVR. This email will be sent daily, by default at midnight, containing an attached report of the appointments.



View Submission Types

Basic Setup
Manage Regulatory Access
Web Settings
Print Settings
Email Notifications
Job Tracking
uDeliver
Email Setup
SMS Setup
IVR Setup
Daily Schedule Email
uCampaign
uSecure
Customized Workflow

Daily Schedule Report For U_Energy										
05/06/2019 3:15 pm										
Original Submission File: Uluro_Energy_data.xml										
Submission ID: 4113										
Client: Uluro Training										
Submitter ID: 84										
Name: Uluro_Energy										

It is set up the same as any other email event.

Event – Select Daily Schedule. It will already be selected if the event is being created using the Daily Schedule Email tab.

To Email Addresses – Enter the email addresses of the people that need to receive this email event. If multiples are being entered, separate them with a ; delimiter. For the events that this has greyed out, the email addresses will be pulled from the users' web profile.

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

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

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

HTML Format – If the email is written in HTML, check this box.

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

Enable Tracking—Check this box if you want the Mandrill system to track the email status.

Click Save.

Email Notification Events

Event: Daily Schedule

To Email Addresses: pb@pb.com

Subject: Daily Schedule Email

☐ HTML Format [View HTML](#)

Body:

#CUSTNAME#
Submission:
#SUBNAME#
#SUBMID#
Account:
#SYS_ACCT_ID#
#SYS_NAME#
#SYS_BALANCE#

☐ Enable Tracking

AVAILABLE TAGS

#CSSFILE#
#Custadd1#
#Custadd2#
#CustAdd3#
#CustCity#
#CustCntry#

[Save](#) [Close](#)

SLA Emails

To track that your overall SLA time is met, you can create email events to send if a submission/job is in a status for too long, jeopardizing meeting the overall SLA/Priority.

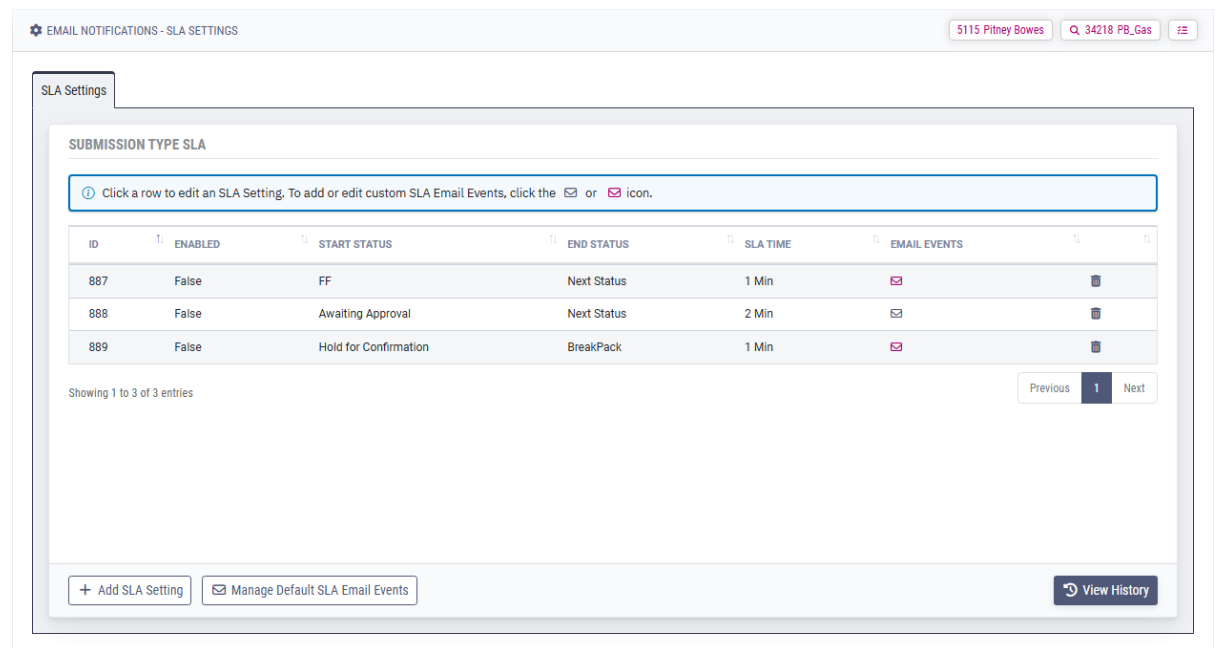
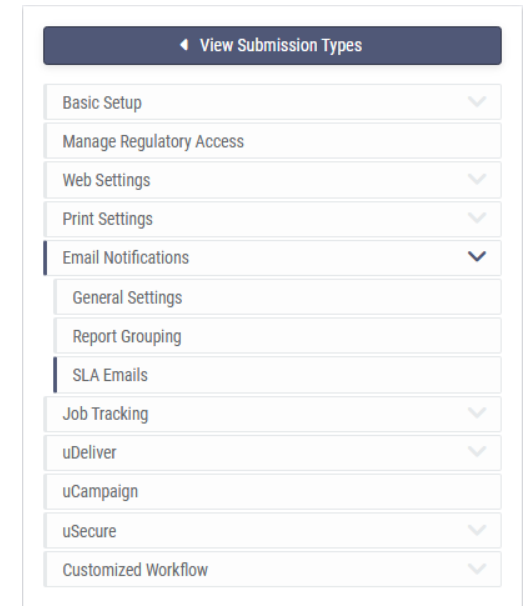
This is for an email to alert that a job is not progressing or that an individual status SLA has been missed. These are based off the status of a job.

ID – This will auto-increment and cannot be edited.

Enabled – This will say “True” if active, or “False” is inactive.

Start Status – The timing will begin when the submission reaches this status.

- Received
- Hold for Confirmation
- PreProcess
- BreakPack
- Awaiting Approval
- Cleansing
- PostProcess
- AutoJob
- Hold and Release
- JobSelect
- Presort
- Ready to Print



- | | | |
|------------------|---------------------|-----------------|
| • Partial Print | • Inserter Complete | • Messages ONLY |
| • Print Complete | • Sorter | • Complete |
| • Inserter | • Mailed | • Rejected |

End Status – The timing will end with the submission reaches this status.

- | | | |
|-------------------------|--------------------|---------------------|
| • Next Status | • AutoJob | • Inserter Complete |
| • Received | • Hold and Release | • Sorter |
| • Hold for Confirmation | • JobSelect | • Mailed |
| • PreProcess | • Presort | • Messages ONLY |
| • BreakPack | • Ready to Print | • Complete |
| • Awaiting Approval | • Partial Print | • Rejected |
| • Cleansing | • Print Complete | |
| • PostProcess | • Inserter | |

Custom statuses are available as the Starting or Ending status.

SLA Time – This is the maximum amount of time that the SLA says the submission should take to go from the start status to the end status.

Send Internal Email if Missed – Check this if you want an internal email if the SLA is not met. An event will need to be created for this. Set the number of minutes to wait before sending another email. If the submission has not reached the ending status (or a status after the ending status) in the amount of time set after the last email, another email will be sent. Emails will continue to be sent using the number of hours/min/days entered for **Send every** until the ending status is reached.

Send External Email if Missed – Check this if you want an external email if the SLA is not met. An event will need to be created for this. Set the number of minutes to wait before sending another email. If the submission has not reached the ending status (or a status after the ending status) in the amount of time set after the last email, another email will be sent. Emails will continue to be sent using the number of hours/min/days entered for **Send every** until the ending status is reached.

An internal/external email for use by all the SLA events or a different one for each SLA event can be set up. This way if an internal email needs to go to Bill and Ryan for awaiting approval being missed, and Alex and Cynthia if it is in Hold for Confirmation status too long, that is possible. Click on the button for Manage Default SLA Email Events for this SLA ONLY for that scenario.

If there is a specific SLA email setup for that SLA scenario, the SLA email events for ALL will not be sent. In the case above, there is an internal email for this SLA only setup. Even if external was checked, the external for all SLAs would not be sent.

If Send internal/external email if missed is checked, you must setup an email event for that email to send. If there is not an email event for All or that SLA only, no one will receive an email notification.

To create an internal or external email event, click the **Green Envelope** icon on the specific Submission Type SLA. Or you can choose to set up a default event by clicking on **Manage Default SLA Email Events**.

Click on the Add Email Event button.

Event – Select the type of email event you wish to create. You can create one of each type:

- SLA External Email
- SLA Internal Email

To Email Addresses – Enter the email addresses of the people that need to receive this email event. If multiples are being entered, separate them with a ; delimiter. In the event that this is greyed out, the email addresses will be pulled from the users' web profile.

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

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

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

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

Click Save.

Email Notification Events

Event: SLA Internal Email

To Email Addresses: pb@pb.com

Subject: SLA Internal Email ALL #SUBMID#

☐ HTML Format [View HTML](#)

Body: #CUSTNAME# #CUSTID# Submission: #SUBNAME# #SUBID# #SUBMID#

☐ Enable Tracking

AVAILABLE TAGS

- #CLOSEAFTERSMSSENT#
- #COMBINEEMAILS#
- #Cons.JobTempID#
- #Cons.JobTicket#
- #Contact#
- #CreateCustomIndex#

[Save](#) [Close](#)

PreProcessing

This step occurs just after the data file is received by Relay Unify before Breakpack. This is useful for changing the data prior to processing it using the map created in composition to create the documents for that submission type.

A VB script or PERL script can be used for preprocessing.

Place the batch, PL, and PM file within the Submit\Prep directory in the appropriate client folder. Run the script to make sure it is working correctly (Command prompt: perl -c name of script (PL) ENTER)

In the submission type, use the relative path from the Prep directory (ex: ClientFolder\Batchfilename.bat \$FPATH \$FILE)

The Parameters that need to be passed to the Program follow the .bat file name. There are 40 Characters for the Program name and Parameters. The use of Batch Files is useful if the actual program name is too long.

For Parameters the following may be used:

\$FILE – This is the current name of the Submitted file.
This is the internal name with the date timestamp and submission ID. Submission IDs with spaces will need to be quoted in preprocessing set up.

\$OFILE – This is the original name of the data file at the time it was received by Relay Unify.

\$FPATH – This is the current location of the Submitted file. The path to the SUBMIT/ directory where the file resides during processing. This value comes from uSetup > Global Settings > Processes &

Directories under a process name of "Submit" and a name of "Directory". Paths with spaces will need to be quoted in preprocessing set up.

\$SUBMID – The numeric submission ID in Relay Unify



Tips:

There can be no spaces in the submission type name if preprocessing!

The screenshot shows the 'GENERAL INFORMATION' tab for a submission type named 'PB_Gas'. The form includes fields for 'Description' (Pitney Bowes Gas), 'Status' (Active), 'Location' (Connecticut), and 'Submission Priority' (2 Days). Under 'REGULATORY ACCESS', there is a 'NONE' button. The 'INCOMING DATA (FILE RECEIPT)' section has checkboxes for 'FTP', 'Web', and 'Email', each with a corresponding directory path. The 'Map Name' field is 'Tyler Demo\pb training.nmp'. The 'Preprocess Program' field is highlighted with a red box and contains the text 'Training\SUCCESS.bat \$FPATH \$FILE'. The 'Postprocess Program' field is empty.

RPPreProcess Program

The RPPreProcess program is called after the file is received from FTP, Web, or Email.

During PreProcessing a logfile will be created. The Logfile will be placed in the Processing directory and named for the date and time of processing in the format of YYYYMMDDHHMMSS.log.

The Processing Directory will be the directory set up under Global Settings > Processes & Directories for PreProcessing.

If this is blank, then the Processing Directory will be the directory where the RPPreProcessing program is located.

 PROCESSES & DIRECTORIES Global Settings

PROCESS SETTINGS

ID	NAME	VALUE	PROCESS NAME	MAX
19	Directory	\\Transqa2\Submit\PostP\	Post Process	2
19	NDeadlock		Post Process	2
19	WaitTime	5	Post Process	2
15	Directory	E:\Submit\PREP	PreProcess	5
15	WaitTime	10	PreProcess	5
16	AMLocation	C:\Program Files (x86)\Pitney Bowes\ConnectRight Mailer Unify\	Presort	3
16	WaitTime	1	Presort	3
13	AllDocsPQ	Y	Print	1
13	APJ_MVJT		Print	1
13	APJ_PDF		Print	1
13	BannerPos	F	Print	1
13	COPYFILES		Print	1
13	DefWaitOnS		Print	1

 View History

The RPPreProcess Program will perform the following:

Check for Archived copy – The Program will look in the Archive directory for a prior copy of the Data file. If found it will copy the file back to the Submit directory for processing. This ensures that resubmissions will be processed from the original datafile instead of the processed datafile.

Archive the original – The original data file will be copied to the Archive directory. The Archive directory will be a directory called ARCHIVE under the Processing directory. The Archived file is used later if the submission is resubmitted.

Capture MD5Sum – The MD5Sum of the file before PreProcessing will be determined.

Call the Preprocessing program – The RPPreprocessing program will create a batch file. The batch file will be placed in the Processing directory and named for the Current Submission file name plus “.bat”. This batch file will contain the program and parameters that are setup in Usetup.

The format of the batch file will be:

“PreProcess Program” Parameters

Exit

For the example above of
SUCCESS.bat \$FILE “\$FPATH” this
would result in a Batch file of:

SUCCESS.bat
“ORIGINALFILENAME.txt” FILENAME
“FILE DIR”

Exit

SUBMISSION DETAILS

MARK FOR PROCESSING

SUBMISSIONS SUBMISSION 15595

SUBMISSION DETAILS

SUBMISSION ID: 15595

STATUS: Ready to Print

TYPE: Pitney Bowes Gas

CUSTOMER NAME: Pitney Bowes

EXTERNAL CUSTOMER #:

MAP: Tyler Demo\pb training.nmp

EXPIRES: N

EXPIRATION DATE:

EXCLUSIONS

	ESTATEMENT = N	ESTATEMENT = Y	TOTAL
Non-Excluded	32	0	32
No Mail	0	0	0
Omit	0	0	0
Exclude	0	0	0
Total	32	0	32

FILE INFORMATION

DATE RECEIVED: 3/21/2025 1:25:58 PM

RECEIVED VIA: FTP

FILE NAME: 20250307153837260PB_Gas

ORIG FILE NAME: Normal_1_of_1.pdf

MD5 SUM: 6F06EF383FD7A2DCDE63B2BA0410216B

TOTAL DOCS: 32

TOTAL CLEANSSED: 0

TOTAL PAGES: 32

JOB & PRINT INFORMATION

JOB STATUS: Ready to Print

PS JOB ID: 10125

FORM: Standard 24 lb paper blank

WEB APPROVAL

APPROVED:

DATE APPROVED:

APPROVED BY:

APPROVAL REASON:

If the file was processed successfully the created batch file will be deleted. If an error occurs, the batch file will not be deleted.

It is suggested that the Preprocessing program set up on the Submission Type maintenance should create a temporary directory. Copy the file into the directory. Then process the file. A log file should be created for Debugging. When processing is complete create a result file in either the Processing directory (not the Temporary directory) or the Submission file directory. If the Processing was successful, then the Result file should contain:

Result=0

If the Processing was not successful, then the Result file should contain:

Result=1

Successful processing should copy the processed file from the Temporary directory into the Submission directory with the current file name. This will overwrite the existing file. The Temporary directory and all files within the Temporary directory should be deleted.

Unsuccessful processing should leave the Temporary directory for use in debugging the processing.

When the PreProcessing is finished the RPPreProcessing program will look for a file in the Processing directory named for the Submission file with the extension “.result”. The result file is not found in the Processing directory RPPreProcessing will look in the Submission file directory for the file.

If the result file is found the value of Result in the Result file will be used to determine the Success of the Processing.

If the result file is not found in the Submission file directory, then the Program will check the MD5SUM of the processed file. If the MD5Sum has changed then RPPreprocessing will assume the file was processed successfully.

If Successful, the Result file will be deleted.

If Preprocessing was not successful, the files will not be deleted, and the Submission will be placed in Error Status. When this occurs look for the Logfiles and determine the reason for the Failure. The logfiles can be found in logfiles folder within the Prep directory.

The submission can then be resubmitted after the error has been corrected.

XML data providing body of emails

The body(s) of the emails must be in a CDATA XML node and defined in Relay Unify uCompose.exe.

This is done using a post processing procedure defined in the submission type. The program uXMLEmail.exe is used and must have the parameter Submid passed to it.

GENERAL INFORMATION 5115 Pitney Bowes Q 34218 PB_Gas ⚙

Submission Type: Description: Status:

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

Location: Submission Priority:

INCOMING DATA (FILE RECEIPT)

☒ FTP	FTP Directory: \\TransQa2\Submit\FTP\Tyler Demo\PB Training\	📄
☒ Web	Web Directory: \\TransQa2\Submit\Web\Tyler Demo\PB Training\	📄
☐ Email	Email Directory:	📄

Map Name:

Preprocess Program:

Postprocess Program:

Data file

Data File:

Doc #: of Page: of

XML Data | User Fields | Sys Fields | Variables

job

- id
- source
- creationDate
- messages
 - message
 - id
 - to
 - subject
 - body
 - #cdata-section
 - altbody
 - #cdata-section

<!DOCTYPE html><html class="OUTPUT WEB CHANNEL_WEB s
scale="1.0"><head> <meta http-equiv="Content-Type" cont
type="text/css"></style><style type="text/css"></style><style typ

D: 1 P: 1 X: Y: SX: SY: W: H:

Map Commands

- Define: Input Data File Test.xml
- Define: Input Page
- Define: Doc:
- Define: Output Page Default
- Begin: DEFINE FIELDS
 - Define:Field: SOURCE ID : Text
 - Define:Field: SOURCE : Text
 - Define:Field: SOURCE CREATIONDATE : Text
 - Define:Field: MESSAGE ID : Text
 - Define:Field: TO : Text
 - Define:Field: SUBJECT : Text
 - Define:Field: BODY : Text

PostProcessing

PostProcessing occurs after cleansing but before a job is created. There are three different ways to call a program or stored procedure for post processing.

Parameters

\$SUBMID – This will send the Submission ID to the program or stored procedure.

\$OFILE – This will send the Original File name to the program or stored procedure. If the original file name contains spaces then surround with “ ” for programs and ‘ ’ for Stored procedures. Examples are “\$ofile” for program and ‘\$ofile’ for stored procedures.

\$FILE – This will send the current File name to the program or stored procedure. If the current file name contains spaces then surround with “ ” for programs and ‘ ’ for Stored procedures. Examples are “\$file” for program and ‘\$file’ for stored procedures.

\$FPATH – This will send the current File path to the program or stored procedure. If the current file path contains spaces then surround with “ ” for programs and ‘ ’ for Stored procedures. Examples are “\$fpath” for program and ‘\$fpath’ for stored procedures.

You can also pass fixed values as well.

The Case of the variables is not important.

Stored Procedure in Relay Unify Database

A Stored Procedure in the Relay Unify database will be used if the Post Processing program begins with @. The Name of the Stored procedure is provided after the @. Then the parameters are provided as a comma separated list to the stored procedure. The parameters may be fixed or variables. Text parameters should be contained in single quotes ‘ ’.

Example: @SplitSubmission \$SUBMID, ‘\$OFILE’

Stored Procedure in Web database

A Stored Procedure in the Web database will be used if the Post Processing program begins with #. The Name of the Stored procedure is provided after the #. Then the parameters are provided as a comma separated list to the stored procedure. The parameters may be fixed or variables. Text parameters should be contained in single quotes '.

Example: #AddWebUsers \$SUBMID,'\$OFFILE'

External Program

If the Program does not begin with # or @ then the system expects a program to run. An External program may be defined for Post Processing and can be a program or a batch file. Parameters are provided as a space delimited list of parameters. Text parameters should be contained in double quotes “.

The base path for the external programs is the path of the Post Processing Service. It is suggested that a batch file be used as the External Program and the batch file call the appropriate other programs.

Example: MYBatchFile.bat \$SUBMID "\$FPATH" "\$FILE" or MYProgram.exe \$SUBMID "\$FPATH" "\$FILE"

The User Running the Service must have “Log on as a batch job” permission to run batch files.

The Service looks for Batch files in the Same directory as the Service.

Batch files can call other batch files.

The First line of the Batch file should be a CD (Change Directory) command to put the set the directory.

The Program must perform its own logging. No errors will be passed back to Relay Unify. After the program executes the service will wait for the program to exit. If it has not exited after Defined number of seconds an error will be generated in the Event log and the submission will be moved to the next status.

The Defined Number of seconds defaults to 600 (10 Minutes). It can be set to a different value in the Registry. HKEY_CURRENT_USER\Software\Pitney Bowes\Post Process and the value is held in MaxWaitSecs.

Post Processing Service

When submissions using postprocessing will go into PP Running status while PostProcSvr.exe is running. As Submissions are processed an entry in the Windows event log will be created.

Errors will not be passed to the Submission. The submission will always move to the next status after post processing.

A Submission Transaction will be created during Post Processing.

Alternative Directory

The Directory for Post processing programs can be set in Usetup under Processes & Directories.

Start the Relay Unify Post Processing Service to add the Setting in Usetup. Then Stop the Service.

If the setting is blank, then the directory will be set to the Path of the Relay Unify Post Processing Service.

The path is set at program startup. After changing, restart the service.

PROCESSES & DIRECTORIES

Global Settings

PROCESS SETTINGS

ID	NAME	VALUE	PROCESS NAME	MAX
19	Directory	\\Transqa2\Submit\PostP\	Post Process	2
19	NDeadlock		Post Process	2
19	WaitTime	5	Post Process	2
15	Directory	E:\Submit\PREP	PreProcess	5
15	WaitTime	10	PreProcess	5
16	AMLocation	C:\Program Files (x86)\Pitney Bowes\ConnectRight Mailer Unify\	Presort	3
16	WaitTime	1	Presort	3
13	AllDocsPQ	Y	Print	1
13	APJ_MVJT		Print	1
13	APJ_PDF		Print	1
13	BannerPos	F	Print	1
13	COPYFILES		Print	1
13	DefWaitOnS		Print	1

View History

Relative path for Program

Relative paths for the program now come from the Base Directory.

In submission type maintenance, enter the relative path (no leading \) and the program name.

There must not be any space in the path or program name.

Logging

The service allows enabling/disabling logging to the event viewer.

To enable/disable change the setting in the DBServices.ini and restart the service.

[Service]

Logging=1

1 to enable logging and 0 to disable logging.

The logging is set at program start. After changing, restart the service.

If an Error occurs and logging is on, it will be visible in the Event Viewer.

GENERAL INFORMATION

5115 Pitney Bowes

34218 PB_Gas

Submission Type

PB_Gas

Description

Pitney Bowes Gas

Status

Active

REGULATORY ACCESS

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

NONE

Location

Connecticut

Submission Priority

2 Days

INCOMING DATA (FILE RECEIPT)

☒ FTP

FTP Directory

\\TransQa2\Submit\FTP\Tyler Demo\PB Training\

☒ Web

Web Directory

\\TransQa2\Submit\Web\Tyler Demo\PB Training\

☐ Email

Email Directory

Map Name

Tyler Demo\pb training.nmp

Preprocess Program

Postprocess Program

PBTraining\WriteCSV.exe

Application Number of events: 55,496			
Level	Date and Time	Source	Event ID
Error	5/23/2018 3:19:48 PM	UluroPostProcService	99
Information	5/23/2018 3:19:48 PM	UluroPostProcService	73
Information	5/23/2018 3:19:37 PM	UluroPostProcService	73
Information	5/23/2018 3:18:56 PM	UluroPostProcService	99
Information	5/23/2018 3:18:55 PM	UluroPostProcService	2
Information	5/23/2018 3:18:55 PM	UluroPostProcService	2
Information	5/23/2018 3:15:57 PM	UluroBreakPackService	5
Event 99, UluroPostProcService			
General Details			
The description for Event ID 99 from source UluroPostProcService cannot be found. Either component that raises this event is not installed on your local computer or the installatic corrupted. You can install or repair the component on the local computer.			
If the event originated on another computer, the display information had to be saved wit			
The following information was included with the event:			
Could Not start "d:\work\custid9\WriteCSV.exe"			
TermCode = 0			

Installing

Stop the service if it already exists. Replace Relay UnifyPostProcSvr.exe. Restart service.

For a new Install, place the Relay UnifyPostProcSvr.exe in the desired directory.

There must be a DBServices.ini file for the Program to connect to the database.

Use SetDB to set the database connection.

SetDB will not create dbservices.ini. If desired, create the file manually before running SetDB.

To install, run the following as administrator from the directory with Relay UnifyPostProcSvr.exe

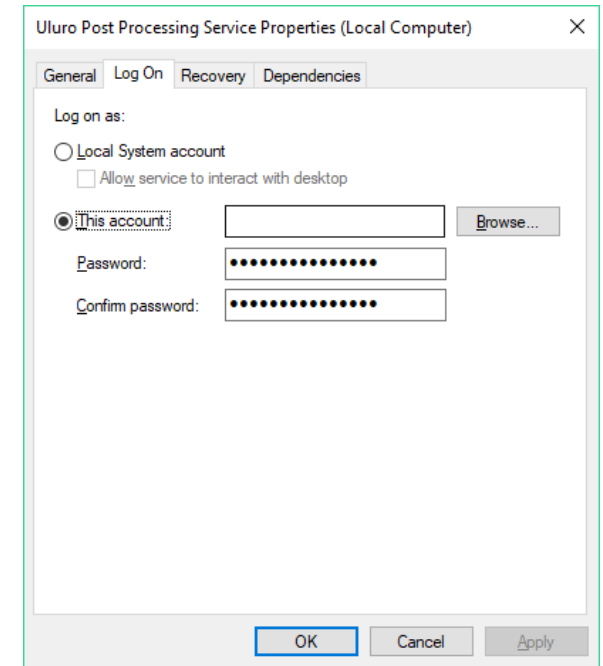
Relay UnifyPostProcSvr.exe /install

Check the Services control panel.

Set the correct User and Password.

Start the service.

The service will always log starting and Connecting to Database.



Split Submission based on Page Count

The input submission can be used to split into two output submissions based on the page count of the documents. The same submission type can be used for both the Input Submission type and the Split submission type, or the Input Submission Type can be split to two Output Submission Types.

Add the postprocessing procedure to the submission in the format: @splitSubmission \$SUBMID, 1, 168, 169

@ indicates that this is a stored procedure

\$SUBMID – will pass the current Submid into the stored procedure.

1 is the Page count split. 1 for 1 page and multiple pages, use 2 for 2 or less and more than 2 pages.

168 is the new submission type id for the lower page count.

169 is the new submission type id for the upper page count.

You can use 0,0 to cause the submission type to remain the same as the current submission.

After Address Cleansing this will split the submission into 2 new submissions. One submission will contain the page count or less and the other will contain greater than the page count.

The screenshot displays the 'GENERAL INFORMATION' tab of a submission configuration interface. At the top right, there are two search filters: '5115 Pitney Bowes' and '34218 PB_Gas'. The main form contains several sections:

- Submission Type:** PB_Gas
- Description:** Pitney Bowes Gas
- Status:** Active (dropdown menu)
- REGULATORY ACCESS:** A section with a 'NONE' button and a note about managing regulatory access.
- Location:** Connecticut (dropdown menu)
- Submission Priority:** 2 Days (dropdown menu)
- INCOMING DATA (FILE RECEIPT):** A section with checkboxes for FTP, Web, and Email, each with a corresponding directory path.
- Map Name:** Tyler Demo\pb training.nmp
- Preprocess Program:** (empty field)
- Postprocess Program:** @splitSubmission \$SUBMID, 1, 168, 169 (highlighted with a red box)

The original submission will be cancelled, and the new submissions will continue through the processing. The next status will be Job Select.

SETTINGS

☐ Auto Refresh

Interval 10

Refresh

Records to Display

Total 50

Apply

Status Colors

Submission Tickets

	Id	Job ID	Customer	SubTypeId	Received	Submission	Ext Cust Num	Regulatory	Status	# of Docs
☐	15688		Pitney Bowes	34223	4/10/2025 11:32:04 AM	Relay Unify Electric			Submission Cancelled	6
☐	15689		Pitney Bowes	34223	4/10/2025 11:32:04 AM	Relay Unify Electric			AutoJob	4
☐	15690		Pitney Bowes	34225	4/10/2025 11:32:04 AM	test331			AutoJob	2
☐	15685		Pitney Bowes	34223	4/10/2025 11:27:51 AM	Relay Unify Electric			Submission Cancelled	6

Transaction records will be created to indicate that the original file was split, and the new files were the results.

The resulting submissions status flow will begin with PP Running.

SUBMISSION DETAILS

MARK FOR PROCESSING

SUBMISSIONS

SUBMISSION 15689

SUBMISSION DETAILS

SUBMISSION ID: 15689

STATUS: Print Manager

TYPE: Relay Unify Electric

CUSTOMER NAME: Pitney Bowes

EXTERNAL CUSTOMER #: Tyler Demo/RU Electric.nmp

MAP:

EXPIRES: N

EXPIRATION DATE:

EXCLUSIONS

	ESTATEMENT = N	ESTATEMENT = Y	TOTAL
Non-Excluded	4	0	4
No Mail	0	0	0
Omit	0	0	0
Exclude	0	0	0
Total	4	0	4

FILE INFORMATION

DATE RECEIVED: 4/10/2025 11:32:03 AM

RECEIVED VIA: FTP

FILE NAME: 20250410113203350RU_Energy

ORIG FILE NAME: RUElectricData_overflowdetails.csv

MDS SUM: 68A2FFAD24DFB713421D5AA43AB4DC62

TOTAL DOCS: 4

TOTAL CLEANSED: 0

TOTAL PAGES: 4

JOB & PRINT INFORMATION

JOB STATUS: Print Manager

PS JOB ID: 10189

FORM: Standard 24 lb paper blank

WEB APPROVAL

APPROVED:

DATE APPROVED:

APPROVED BY:

APPROVAL REASON:

SUBMISSION TRANSACTION DETAIL

Select Details

Transaction Audit Log

TRANSACTIONS

ID	DATE	TRANSACTION DESCRIPTION	USER NAME
14520135	4/10/2025 11:32:27 AM	Submission Protected	System
14520138	4/10/2025 11:32:27 AM	First result of Split submission from 15688	System
14520139	4/10/2025 11:32:27 AM	AutoJob	System
14520142	4/10/2025 11:32:40 AM	Ready to Print	System
14520146	4/10/2025 11:33:03 AM	Print Manager	System

SUBMISSION DETAILS
MARK FOR PROCESSING

SUBMISSIONS
SUBMISSION 15690

SUBMISSION DETAILS

SUBMISSION ID: 15690
STATUS: Ready to Print
TYPE: test331

CUSTOMER NAME: Pitney Bowes
EXTERNAL CUSTOMER #:
MAP: Tyler Demo\pb training.nmp

EXPIRES: N
EXPIRATION DATE:

EXCLUSIONS

	ESTATEMENT = N	ESTATEMENT = Y	TOTAL
Non-Excluded	2	0	2
No Mail	0	0	0
Omit	0	0	0
Exclude	0	0	0
Total	2	0	2

FILE INFORMATION

DATE RECEIVED: 4/10/2025 11:32:03 AM
RECEIVED VIA: FTP
FILE NAME: 20250410113203350RU_Energy
ORIG FILE NAME: RUElectricData_overflowdetails.csv

MD5 SUM: 68A2FFAD24DFB713421D5AA43AB4DC62
TOTAL DOCS: 2
TOTAL CLEANSED: 0
TOTAL PAGES: 4

JOB & PRINT INFORMATION

JOB STATUS: Auto Print
PS JOB ID: 10190

FORM: Standard 24 lb paper blank

WEB APPROVAL

APPROVED:
DATE APPROVED:

APPROVED BY:
APPROVAL REASON:

SUBMISSION TRANSACTION DETAIL

Select Details
Transaction Audit Log

TRANSACTIONS

ID	DATE	TRANSACTION DESCRIPTION	USER NAME
14520136	4/10/2025 11:32:27 AM	Submission Protected	System
14520140	4/10/2025 11:32:27 AM	Second result of Split submission from 15688	System
14520141	4/10/2025 11:32:27 AM	AutoJob	System
14520143	4/10/2025 11:32:40 AM	Ready to Print	System

The original submission will have the status flow up through cleansing.

SUBMISSION DETAILS

MARK FOR PROCESSING

SUBMISSIONS ▸ SUBMISSION 15625

SUBMISSION DETAILS

SUBMISSION ID: 15625

STATUS: Submission Cancelled

TYPE: Pitney Bowes Gas

CUSTOMER NAME: Pitney Bowes

EXTERNAL CUSTOMER #: Tyler Demo\pb training.nmp

MAP:

EXPIRES: N

EXPIRATION DATE:

EXCLUSIONS

	ESTATEMENT = N	ESTATEMENT = Y	TOTAL
Non-Excluded	32	0	32
No Mail	0	0	0
Omit	0	0	0
Exclude	0	0	0
Total	32	0	32

FILE INFORMATION

DATE RECEIVED: 3/31/2025 11:51:35 AM

RECEIVED VIA: FTP

FILE NAME: 20250307153837260PB_Gas

ORIG FILE NAME: Normal_1_of_1.pdf

MD5 SUM: 6F06EF383FD7A2DCDE63B2BA0410216B

TOTAL DOCS: 32

TOTAL CLEANSED: 0

TOTAL PAGES: 32

JOB & PRINT INFORMATION

JOB STATUS:

PS JOB ID: None

FORM: Standard 24 lb paper blank

WEB APPROVAL

APPROVED:

DATE APPROVED:

APPROVED BY:

APPROVAL REASON:

SUBMISSION TRANSACTION DETAIL

Select Details

Submission Flow

SUBMISSION FLOW

STATUS	ORDER	STATUS DATE	CUSTOM
Received	100	3/31/2025 11:51:35 AM	☐
BreakPack	400	3/31/2025 11:51:35 AM	☐
PostProcess	1000	3/31/2025 11:51:39 AM	☐
PostProc Running	1100	3/31/2025 11:51:42 AM	☐
Submission Cancelled	2900	3/31/2025 11:51:42 AM	☐

How to import/setup web user fields from input data

The System has been modified to allow web users to be obtained from the input data. These users can then be saved into the database and used to log in to the web.

The data must contain the Email Address, user login and password for the web user.

The map must contain the fields EMAILADDRESS, USERLOGIN and PASSWORD. These should all be Save to DB Fields.

The Submission Type must be set up with the AutoAddWebUser postprocessing stored procedure.

Occurrence

☒ First

☐ Last

☐ Page

FieldName: EMAILADDRESS

Value Type

☒ Text

☐ Real

☐ Date

☐ Integer

☐ Currency

☐ Boolean

Function: Trim

System Field Link:

Define

Error Handling

Field Type

☐ Position

☐ Test

☒ Delimited

☐ Fixed

☐ XML

☐ Not Assigned

Delimiter: ,

Field #: 1

Row #: 1

2C

Click Hex button to edit Hex values

☐ Disable Removal of "

☒ Save to DB

For Case Insensitive, surround Regular Expression with /.../i

☐ Display on Payment Settlement Report (Authorize.net only)

OK

Cancel

GENERAL INFORMATION

5115 Pitney Bowes

34218 PB_Gas

Submission Type

PB_Gas

Description

Pitney Bowes Gas

Status

Active

REGULATORY ACCESS

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

NONE

Location

Connecticut

Submission Priority

2 Days

INCOMING DATA (FILE RECEIPT)

☒ FTP

FTP Directory

\\TransQa2\Submit\FTP\Tyler Demo\PB Training\

☒ Web

Web Directory

\\TransQa2\Submit\Web\Tyler Demo\PB Training\

☐ Email

Email Directory

Map Name

Tyler Demo\pb training.nmp

Preprocess Program

Postprocess Program

#AddWebUsers \$SUBMID, \$OFIL

With a PostProcessing Program set, the submission will go to PostProcessing after Cleansing. This will cause the AutoAddWebUser stored procedure to be called. When the Stored Procedure is complete it will move the status to the next value depending on how the submission is set up.

How to Use Email Address From Input data

Email Addresses can be obtained from the input data, which is then saved in the database and used to send a PDF email to the user containing their document. If desired this can also mark the document as an e-statement which prevents the document from being printed.

The Database must be updated with SetEmail and RunEvents stored Procedures.

The data must contain the Email Address.

The map must contain the field EMAILADDRESS as a saved to DB field.

The Submission Type must have the Email Event Send End User PDF Email setup. This is set up in the Emails tab of the submission type.

The screenshot shows the 'Edit Fields' dialog box. The 'Occurrence' tab is active, with 'First' selected. The 'FieldName' is 'EMAILADDRESS'. The 'Value Type' is 'Text'. The 'Function' is 'Trim'. The 'System Field Link' is empty. The 'Define' tab is also visible, showing 'Delimited' as the field type. The 'Delimiter' is a comma. The 'Field #' is '1' and the 'Row #' is '1'. The 'Save to DB' checkbox is checked and highlighted with a red box. The 'OK' and 'Cancel' buttons are at the bottom.

Email Notification Events

Event

Send End User PDF Email

To Email Addresses

Subject

Send End User PDF Email

☐ HTML Format

View HTML

Body

#CUSTNAME#
Submission:
#SUBNAME#
#SUBMID#
Account:
#SYS_ACCT_ID#
#SYS_NAME#
#SYS_BALANCE#

AVAILABLE TAGS

#DoReapproval#
#EDocument#
#email#
#EMAILDIR#
#EmailExCrit#
#EmailProfile#

☐ Enable Tracking

Save

Close



Tips:

The owner of the document should not be a user setup on the web already. If they are, then the document will use the settings from Relay Unify Web instead of the settings set by the SetEmail stored procedure.

The Submission Type must be set up with SetEmail postprocessing Stored Procedure.

@setEmail \$SUBMID, 'Y' or @setEmail \$SUBMID, 'N'

@setEmail is the Stored procedure to call

\$Submid will cause the System to pass the Submission ID to the Stored Procedure.

The 'Y' or 'N' represents Email Only flag on the Stored Procedure. If 'Y' then the document will be marked as an E-statement (not printed). If 'N' then the document will be marked for Email and Printing.

GENERAL INFORMATION
5115 Pitney Bowes
34218 PB_Gas

Submission Type
PB_Gas
Description
Pitney Bowes Gas
Status
Active

REGULATORY ACCESS

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

NONE

Location
Connecticut
Submission Priority
2 Days

INCOMING DATA (FILE RECEIPT)

☒ FTP
FTP Directory
\\TransQa2\Submit\FTP\Tyler Demo\PB Training\

☒ Web
Web Directory
\\TransQa2\Submit\Web\Tyler Demo\PB Training\

☐ Email
Email Directory

Map Name
Tyler Demo\pb training.nmp

Preprocess Program
Postprocess Program
@setEmail \$SUBMID, 'Y'

With a PostProcessing Program set, the submission will go to PostProcessing after Cleansing. This will cause the SetEmail stored procedure to be called. When the Stored Procedure is complete it will move the status to the next value depending on how the submission is set up.

Once the Submission goes to Ready to Print (put on a Job and Processed through Presort If necessary) then an Event will be generated to create the PDF email. The PDFEmail program will then run, creating the PDF and sending the email to each user.

Auto Merge Job for Merging within one Submission

This post process allows merging of documents within one submission. This is different from Hold and Release because it allows the submission to process through Ready to Print status. This would be used if SMS or email events that are set up for the submission are dependent on processing through Ready to Print status.

This will eliminate any excluded or e-statement documents from being placed on the job; Those documents will not be available for print.

The Automatically create a Job checkbox will need to be unchecked. The postprocess with push it to Job Select status and create the job using the Auto Merge.

The Post Processing Program entered on a submission would be:

```
@AutoMergeJob $Submid,'addr',19
```

@AutoMergeJob is the stored procedure name

\$Submid passes the Submission Id to the Stored procedure

'Addr' is the Merge Type. This can be 'Acct' or 'Addr' or 'Acct, Addr' or 'Name, Addr'

19 is the Presort Type. Leave this off and the Presort Type will be the Presort type set on the Submission type.

INCOMING DATA (FILE RECEIPT)

☒ FTP

FTP Directory
\\TransQa2\Submit\FTP\Tyler Demo\PB Training\

☒ Web

Web Directory
\\TransQa2\Submit\Web\Tyler Demo\PB Training\

☐ Email

Email Directory

Map Name
Tyler Demo\pb training.nmp

Preprocess Program
Training\SUCCESS.bat \$FPATH \$FILE

Postprocess Program
@AutoMergeJob \$Submid, 'Name,Addr'

Consistency of HTML Emails

There is the ability to have consistent appearance of html emails across all email clients. There is an executable program to inline the styles in an entire xml file containing multiple documents. This is intended to be run as a preprocess using the parameter SubmID.

INCOMING DATA (FILE RECEIPT)

☒ FTP

FTP Directory
\\TransQa2\Submit\FTP\Tyler Demo\PB Training\

☒ Web

Web Directory
\\TransQa2\Submit\Web\Tyler Demo\PB Training\

☐ Email

Email Directory

Map Name
Tyler Demo\pb training.nmp

Preprocess Program
CssInLiner.bat \$SUBMID

Postprocess Program
uXMLEmail.exe \$Submid

Copy a Submission Type

You can copy a submission type from any customer to any other customer.

This will create a copy of the submission type under the current customer selected. Go to the customer you wish to copy the submission to and go into a submission type.

Click the **Copy** button.

MANAGE SUBMISSION TYPES

5115 Pitney Bowes

SUBMISSION TYPES

Search:

	SUB ID	SUBMISSION TYPE	DESCRIPTION	REGULATIONS	STATUS	
	34222	PB_Camp	PB Campaign		Inactive	
	34218	PB_Gas	Pitney Bowes Gas		Active	
	34223	RU_Energy	Relay Unify Electric		Inactive	
	34221	RU_Water	Relay Unify Water		Inactive	

Showing 1 to 4 of 4 entries

Previous1Next

+ Add Submission Type

Copy

Select the customer and submission type you wish to copy from the dropdowns. It will automatically have the customer and submission type you were in when you clicked the copy button. These can be changed to any customer and submission type.

New Submission Type – Enter the new Submission Type up to ten characters. This field must be unique.

New Description – Enter the new description up to forty characters.

Click Continue.



Success!

New Submission Type has been created.
You will need to set the Incoming Data or File Receipt folders and the map.



Copy Submission Type

Customer to copy from: Pitney Bowes

Submission Type to copy from: PB_Gas

New Submission Type

New Description

Save

Close

You can now modify the copy as necessary. The File receipt directories and map field will need to be updated.

The status of the new submission type will be Inactive, so you can make the necessary changes before activating it.

Submission Type Report

If you would like to view the submission type configuration as a report, click on the View Report button under the Submission Type Report section of Job Tracking Dropdown > General Settings.

MANAGE JOB TRACKING

5115 Pitney Bowes34218 PB_Gas

GENERAL SETTINGS

SUBMISSION TICKET

☐ Auto Print the Submission Ticket

CONSOLIDATED JOB TICKET

☒ Enabled

Template

Default Consolidated Job Ticket

SUBMISSION TYPE REPORT

View Report

Save

View History

Example:

Customer: Transformations Testing
Sub Type ID: 3 **Sub Type:** payments **Description:** Payments Testing **Status:** Active

Basic Settings

Cleanse Type: Architect **Presort Type:** Satori Presort LM.pst **Preprocess Program:**
Postprocess Program: **Map Name:** payments\WaterUtilityCM.nmp
Location: Warhammer **Auto Create Jobs:** ☒ **Autoprint Job Tickets:** ☐

Forms/Weights		Print Manager		Emails	
Primary Form:	Basic Blank Form	Min # of Docs:	1	Hold Email Events:	☐
Secondary Form:	Basic Blank Form	Max # of Docs:	0	Combine Emails:	☐
Envelope:	Number 10 Window	Inserts:	POSTAL	PDF Name Temp:	TransPayments
Weight: 0.13	Thickness: 0.1	Location:	Warhammer	Addresses	
Return Envelope:		Auto Combine:	☒	Reports:	
Weight: 0	Thickness: 0	Print Manager:	☒	Web View:	

Hold and Release **File Receipt**

Use Hold & Rel: ☐ ☒ **Submit automatically from FTP to** \\warhammer.trans.loc\Submit\FTP\Default\payments
Merge On: ☐ **Submit automatically from Email to**
Max # Days: 0 ☒ **Submit automatically from Web to** \\warhammer.trans.loc\Submit\websubmit\payments\
Min Amount: 0
Merge Group: Payments No Presort

Address IMB		Return IMB	
Mailer ID:	901921837	Mailer ID:	901921837
Service Type ID: 270	Barcode: 10	Service Type ID: 270	Barcode: 10

Web

☒ **Display Submissions on Web** ☐ **Submissions Require Web Approval** ☐ **Allow Web Edit of Exclusions**
☒ **Accounts/Users can view documents** ☒ **Allow Payments** ☒ **Require Comments on Payments**

PDF Pre-generation **Document Exclusions**

☐ **After Breakpack** ☒ **When Job Status goes to 'Ready to Print'**
PDF Directory \\warhammer.trans.loc\submit\pdf\<#submid>.pdf

Single Signon PDF		Document Exclusions		
☐ Send Document List (CSV File) to FTP Site		Don't Email	Don't Fax	Don't Display
FTP Site		☐ Omits	☐ Omits	☐ Omits
User ID		☐ eXcludes	☐ eXcludes	☐ eXcludes
Password		eStatement Verify		
		Verify User has Viewed eStatement:	☐	
		Number of Days for Verification:	1	
		Number of Additional Emails:	2	
		Autocreate New Submission:	☐	
		Send Email To: rmeyer@transfrm.com		

Security

☐ **Security Enabled on Submission Type**

Page Details			Web Ads					
Page #	Weight	Thickness	Ad Area	Description	Title	Enabled	Starts	Ends
0	0.3	0.08	1	Connect with Realpag	Connect with Realpage	Y	04/24/19	09/27/35
0	0.015	0.003						
1	0.3	0.08						

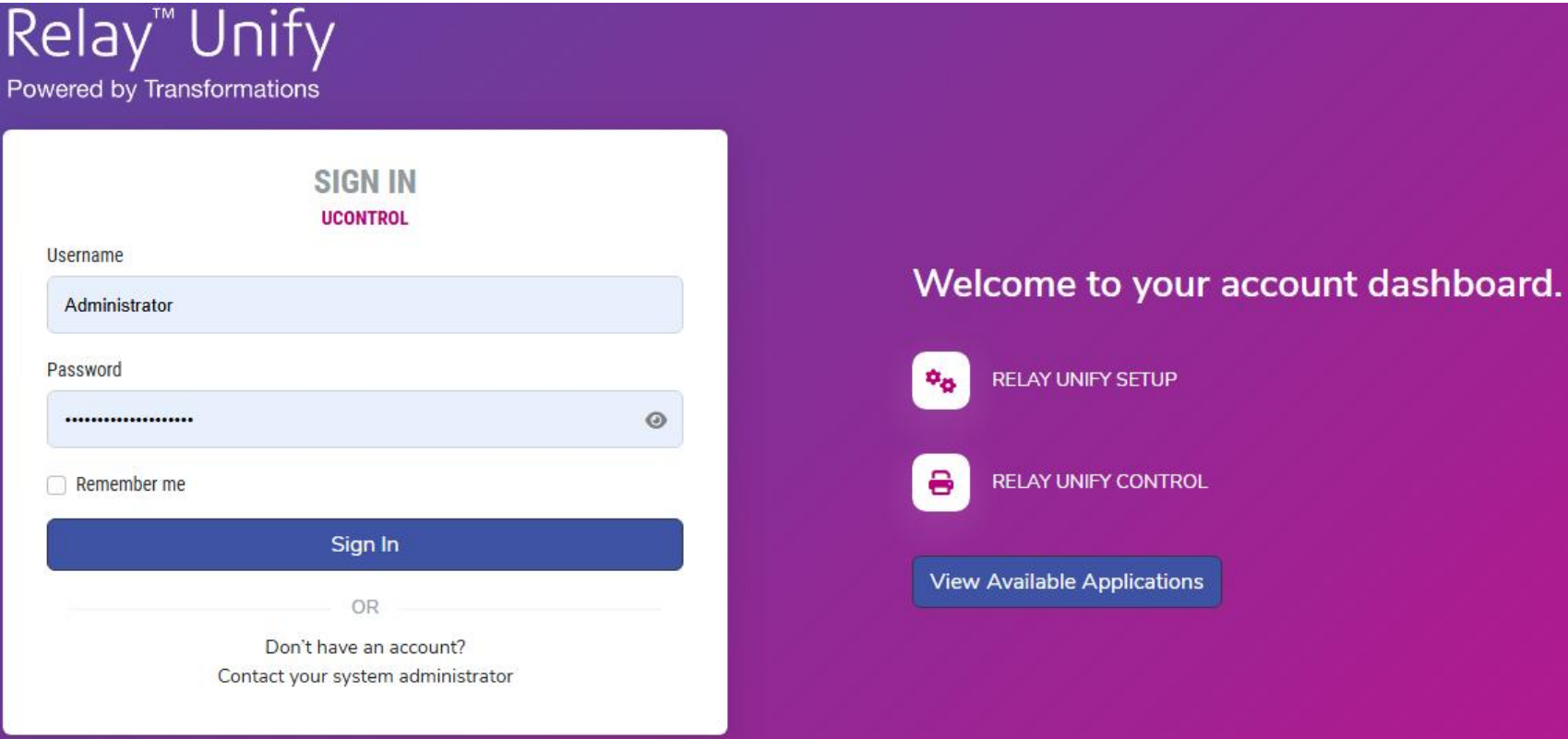
4/24/2025 8:50:58 AM

23

uControl

Logging out

If you click on the Name Tab at the top of your screen, it will give you a dropdown of options. Select the Sign Out option and you will be signed out. To log back in, go to the main menu page and choose the uControl tab to get to the login screen. Enter your credentials to log back in.



Version

To determine the version of uControl, look to the bottom right corner of your screen.

Relay Unify Control Version 2025.03.05.2

Setting a Color Scheme

Select Status Colors under the Submissions Tab-> Select a Status dropdown > Choose the status, and then the color. From there you can Save Settings for the user and that color scheme will be loaded next time the user logs in. This goes also for the View Jobs Tab. For the Production Schedule Tab the user would click on the color they want to change and then click Save Colors.

Status Colors

EDIT STATUS COLORS

Select a Submission Status. Existing status colors will be displayed. Click the color box to choose a new color.

Select a Status

Complete

Deleted

Error

External Update

Hold And Release

Hold for Confirmation

HouseHold

HTML ONLY

Insertter

Insertter Complete

JobSelect

Save

Close

ADDITIONAL FILTERS

☐ Use Receive Date

From Date

01/01/2025

To Date

01/01/2025

File Name

Original File Name

External Job #

Apply Filter

Reset Filter

Save Settings

Reset Settings

PRODUCTION SCHEDULE OVERVIEW

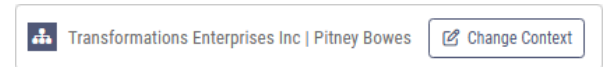
Total Due	1030
Overdue	1024
Due Today	4
Due After Today	2

Save Colors

Reset Default

DB Connection

The first time you log in to uControl web, or any other Relay Unify Program, you will be asked to set up your connection parameters. These connections need to be set up in uSetup. You can change this at any time by selecting Change Context on the main screen.



Database Server Name: This is the SQL server name.

Database Name: This should always be Relay Unify.

Database Username – This is typically trans, or whatever the SQL database connection login is, which is not stored anywhere.

Database Password – This is typically trans, or whatever the password for the SQL server login is, which is also not stored anywhere.

Integrated Security (Windows) – If this is checked, then the Windows domain user login for the SQL server will be used for UserID/PW. (This is not recommended).

DB Port – Default Port is 1433 unless installed differently with DBA.

This is a screenshot of the 'MANAGE NODE' configuration page, specifically the 'Database Connection' tab. The page has a header with a gear icon and the text 'MANAGE NODE'. Below the header are four tabs: 'Node Details', 'General Settings', 'Branding', and 'Database Connection'. The 'Database Connection' tab is active. It contains several input fields: 'Database Server Name' with the value 'DATABASE\SERVERNAME', 'Database Name' with the value 'DB NAME', 'Database Username' with the value 'DB USERNAME', 'Database Password' with masked characters '*****', and 'Database Port' with the value '1433'. There is an unchecked checkbox labeled 'Use Integrated Security'. At the bottom are 'Save' and 'Cancel' buttons.This is a screenshot of the 'MANAGE NODE' configuration page, specifically the 'Database Connection' tab. The page has a header with a gear icon and the text 'MANAGE NODE'. Below the header are four tabs: 'Node Details', 'General Settings', 'Branding', and 'Database Connection'. The 'Database Connection' tab is active. It contains several input fields: 'Database Server Name' with the value 'DATABASE\SERVERNAME', 'Database Name' with the value 'DB NAME', 'Database Username' (empty), 'Database Password' (empty), and 'Database Port' (empty). There is a checked checkbox labeled 'Use Integrated Security'. At the bottom are 'Save' and 'Cancel' buttons.

View Submissions Tab

This tab is for viewing submissions and monitoring the status of each.

Relay™ Unify
Powered by Transformations

SETTINGSVIEW SUBMISSIONSVIEW JOBSVIEW PRINT JOBSPRODUCTION SCHEDULE

James Smith

Control

Submission Management
Household, Combine, Resubmit and Beyond

Uluro North America | Transqa2_QC serverChange Context

FILTER & SETTINGS

Auto Refresh

Interval 10

Refresh

Records to Display 50Apply

Status ColorsSubmission Tickets

	Id	Job ID	Customer	SubTypeId	Received	Submission		Regulatory	Status	# of Docs	BP %	Location	Presort	# of Pages	Form
☐	15600	10128	Pitney Bowes	34218	3/21/2025 1:40:27 PM	Pitney Bowes Gas			Ready to Print	32	100	Connecticut		32	Standard 24 lb paper b
☐	15599	10127	Pitney Bowes	34218	3/21/2025 1:40:16 PM	Pitney Bowes Gas			Ready to Print	32	100	Connecticut		32	Standard 24 lb paper b
☐	15596	10126	Pitney Bowes	34218	3/21/2025 1:38:31 PM	Pitney Bowes Gas			Ready to Print	32	100	Connecticut		32	Standard 24 lb paper b
☐	15595	10125	Pitney Bowes	34218	3/21/2025 1:25:59 PM	Pitney Bowes Gas			Ready to Print	32	100	Connecticut		32	Standard 24 lb paper b
☐	15594	10124	CRM Integration Testing	34189	3/17/2025 3:08:33 PM	CASS AND PRESORT TOGETHER			Ready to Print	567	100		CRM CLEANSEPRESORT NCOA PRESORT AUTO	567	8.5 x 11 White Paper
☒	15593	10123	CRM Integration Testing	34189	3/17/2025 3:06:04 PM	CASS AND PRESORT TOGETHER			Done	567	100		CRM CLEANSEPRESORT NCOA PRESORT AUTO	567	8.5 x 11 White Paper
☐	15592	10122	CRM Integration Testing	34189	3/17/2025 3:01:59 PM	CASS AND PRESORT TOGETHER			Ready to Print	567	100		CRM CLEANSEPRESORT NCOA PRESORT AUTO	567	8.5 x 11 White Paper
☒	15591	10121	CRM Integration Testing	34189	3/17/2025 2:39:19 PM	CASS AND PRESORT TOGETHER			Done	567	100		CRM CLEANSEPRESORT NCOA PRESORT AUTO	567	8.5 x 11 White Paper
☐	15590	10120	CRM Integration Testing	34192	3/17/2025 2:08:53 PM	NCOA To Presort SANS IMB			Ready to Print	567	100		CRM Presort No IMB	567	8.5 x 11 White Paper
☐	15589	10119	CRM Integration Testing	34189	3/17/2025 2:01:56 PM	CASS AND PRESORT TOGETHER			Ready to Print	567	100		CRM Presort No IMB	567	8.5 x 11 White Paper
☒	15588	10118	CRM Integration Testing	34191	3/17/2025 1:55:43 PM	NCOA to Presort Standard			Done	25	100		CRM Presort Auto Standard	25	
☒	15587	10117	CRM Integration Testing	34191	3/17/2025 1:32:28 PM	NCOA to Presort Standard			Done	25	100		CRM Presort Auto Standard	25	
☐	15586	10116	CRM Integration Testing	34191	3/17/2025 1:14:34 PM	NCOA to Presort Standard			Ready to Print	25	100		CRM Presort Auto Standard	25	
☐	15585	10115	CRM Integration Testing	34189	3/17/2025 1:08:08 PM	CASS AND PRESORT TOGETHER			Ready to Print	567	100		CRM Presort No IMB	567	8.5 x 11 White Paper
☐	15584	10114	CRM Integration Testing	34191	3/17/2025 12:57:16 PM	NCOA to Presort Standard			Ready to Print	25	100		CRM Presort Auto Standard	25	

FirstPrev1234NextLast

The colors can be changed by clicking on the Status Colors button in the top right corner.

The columns can be sorted by clicking and dragging on the headings.

Any changes you make to the view of the columns such as which are displayed or the order they appear will remain as that user’s settings upon the next login to uControl web.

To edit the columns displayed, click on the ellipsis to the left of the columns. Check the ones that you would like displayed and uncheck those you want to remove from the view.

The options across the top allow a user to easily search for a submission or to narrow down the records being displayed based on certain criteria.

Status – This allows you to sort by a specific status. All statuses are available including custom statuses.

Submission Type – This allows you to see only submission for a specific submission type.

Location – This dropdown contains all of the locations created using uSetup or R.U. Print Manager. Select a specific location to see only the jobs assigned to that location. To assign a location to a job, select that desired location on the submission type, within the Relay Unify Print Manager tab.

Customer – This allows you to see only one customer's submissions.

Records to Display – Enter the total number of records that should be displayed on the dashboard.

Auto Refresh every – Check this to set auto refresh and select the number of seconds between each refresh.

Set Filter – Click this to apply the filters; it is the same result as manually clicking the refresh button.

Clear Filter – Clicking this button resets the search fields to the default settings.

Refresh – Click this button to manually refresh the results in the dashboard.

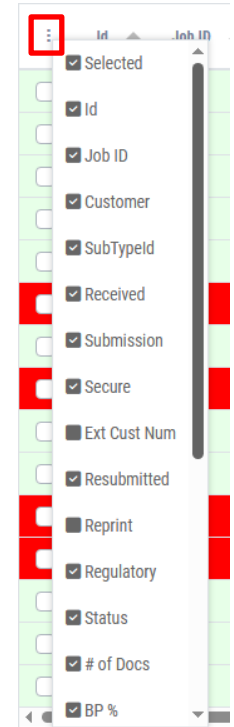
Use Receive Date – Check this to use the **From** and **To** date fields. Once checked, enter the date range and click refresh. Only submission within the date range will be displayed. This is using the date in the received column on the dashboard.

Submission Id – Enter a specific submission ID to narrow down to one submission.

Job ID – Enter a specific job ID to narrow down to one job. If there are multiple submissions on the job all will be listed.

File Name – Enter the file name. This will be the file name after Relay Unify makes a copy of the original file; the copy is archived in the Submit directory. You can use % for wildcards.

Original File Name – Enter the original file name. You can use % for wildcards.



Submission Transaction Details

Select a submission and right click, then choose View Detail to see the transaction details.

The Submission Information comes from what was setup in uSetup in the submission type.

Sub ID – This is the submission ID that was assigned when the data file was received by Relay Unify.

Status – This is the status of the submission.

Type – This is the submission description from the submission type.

Customer Name – This is the customer that the submission type was created under in uSetup.

External Customer # - This is the external customer number entered for the customer in uSetup.

Date Received – This is the timestamp of when the data file was received by Relay Unify. **Via** will display the type of File Receipt that was used to receive the data file, FTP, Email, or Web.

Map – This is the name of the map that was used to create the documents.

Total Docs – This is the total number of documents in the data file.

Total Cleansed – If the submission went through cleansing, the number of cleansed documents will be displayed in this field.

Total Pages – This is the total number of pages for all documents.

File Name – This is the name of the copied data file that is stored in the File Directory. The name is made up of the timestamp (YYYYMMDDHHMMSSmmmSubmissionType) that the data file was received followed by the Submission Type.

Orig File – This is the name of the original file that was received by Relay Unify.

MD5Sum – This is the MD5Sum for the data file.

PS JobID – This is the job ID; this will be blank until the submission is put on a job either manually or using automation.

Job Status – This is the status of the job.

Form – This will be the primary form that was selected under the Consumables section in the submission type.

Approved – If the submission went through Awaiting Approval status to be approved on the web, this will be checked if the

submission was approved. This will be unchecked if the submission was rejected during the approval stage. The **Date** the approval/rejection took place will be logged along with the username of the approver/rejecter in the **By** field. The **Reason** will display the name entered when approving or the reason for the rejection.

SUBMISSIONS ▶ SUBMISSION 15595

SUBMISSION DETAILS

SUBMISSION ID:15595

STATUS:Ready to Print

TYPE: Pitney Bowes Gas

CUSTOMER NAME: Pitney Bowes

EXTERNAL CUSTOMER #:MAP: Tyler Demo/gb training.nmp

EXPIRES: N

EXPIRATION DATE:

EXCLUSIONS

	ESTATEMENT = N	ESTATEMENT = Y	TOTAL
Non-Excluded	32	0	32
No Mail	0	0	0
Omit	0	0	0
Exclude	0	0	0
Total	32	0	32

FILE INFORMATION

DATE RECEIVED:3/21/2025 1:25:58 PM

RECEIVED VIA:FTP

FILE NAME:20250307153837260PB_Gas

ORIG FILE NAME:Normal_1_of_1.pdf

MD5 SUM:6F06EF383FD7A2DCDE6382BA0410216B

TOTAL DOCS:32

TOTAL CLEANSED:0

TOTAL PAGES:32

JOB & PRINT INFORMATION

JOB STATUS:Ready to Print

PS JOB ID:10125

FORM:Standard 24 lb paper blank

WEB APPROVAL

APPROVED:

DATE APPROVED:

APPROVED BY:

APPROVAL REASON:

SUBMISSION TRANSACTION DETAIL

Select Details

Transaction Audit Log

TRANSACTIONS

ID	DATE	TRANSACTION DESCRIPTION	USER NAME
14461218	3/21/2025 1:25:59 PM	Resubmit of 15534	administrator
14461220	3/21/2025 1:25:59 PM	BreakPack	System
14461221	3/21/2025 1:25:59 PM	Assigned to Breakpack on 192.168.1.100	System
14461222	3/21/2025 1:26:00 PM	Begin Breakpack	System
14461223	3/21/2025 1:26:01 PM	Delimited Parser V2	System
14461224	3/21/2025 1:26:01 PM	Delimited data will be trimmed!	System

The Exclusions section provides a breakdown of the totals for each type of exclusion along with the total number of e-statements.

EXCLUSIONS			
	ESTATEMENT = N	ESTATEMENT = Y	TOTAL
Non-Excluded	32	0	32
No Mail	0	0	0
Omit	0	0	0
Exclude	0	0	0
Total	32	0	32

The Transaction Audit Log dropdown will show a list of each status that the submission has gone through and a timestamp for each.

SUBMISSION TRANSACTION DETAIL			
Select Details			
Transaction Audit Log			
TRANSACTIONS			
ID	DATE	TRANSACTION DESCRIPTION	USER NAME
14461218	3/21/2025 1:25:59 PM	Resubmit of 15534	administrator
14461220	3/21/2025 1:25:59 PM	BreakPack	System
14461221	3/21/2025 1:25:59 PM	Assigned to Breakpack on 192.168.1.100	System
14461222	3/21/2025 1:26:00 PM	Begin Breakpack	System
14461223	3/21/2025 1:26:01 PM	Delimited Parser V2	System
14461224	3/21/2025 1:26:01 PM	Delimited data will be trimmed!	System

The Reports dropdown shows a listing of all reports available for the submission; job level reports will not be listed.

You can open a report by selecting the report and clicking on Download Report. Clicking Download All will open all of the reports listed.

You can mark a report for regeneration by clicking on Regenerate Report.

SUBMISSION TRANSACTION DETAIL

Select Details
Reports

TRANSACTIONS

Download Report

Download All

Regenerate Report

REPORT	REPORT DATE	EMAILED	FILE LOCATION	AUTO GEN
CRM Move Update CSV Report	3/13/2025 3:11:16 PM		\\TransQa2\Submit\rpt	✓
CRM Move Update Report	3/13/2025 3:11:16 PM		\\TransQa2\Submit\rpt	✓
CRM Cleanse Report	3/13/2025 3:11:16 PM		\\TransQa2\Submit\rpt	✓
CRM Cass Summary Report	3/13/2025 3:11:16 PM		\\TransQa2\Submit\rpt	✓

The Emails tab shows all the emails that were generated for that submission.

SUBMISSION TRANSACTION DETAIL

Select Details
Emails

EMAILS

DOCUMENT	EMAIL ADDRESS	SUBJECT	CREATED	EMAILED	STATUS MESSAGE	TRACKED	OPENED	CLICKS	OPT OUT	BOUNCED
	tylerm@transfrm.com	Submission is Received	4/4/2025 1:41:40 PM					0		
	ttobin@transfrm.com	Report Group	4/4/2025 1:41:40 PM					0		
	ttobin@transfrm.com	Breakpack Reports	4/4/2025 1:41:40 PM					0		
25256694	tylerm@transfrm.com	Send End User URL Email	4/4/2025 1:41:40 PM					0		
	ttobin@transfrm.com	Submission Ready for Print	4/4/2025 1:41:40 PM					0		
25256692	tylerm@transfrm.com	Send End User PDF Email	4/4/2025 1:41:41 PM			✓		0		
25256693	tylerm@transfrm.com	Send End User PDF Email	4/4/2025 1:41:41 PM			✓		0		

First

Prev

1

Next

Last

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

SUBMISSION TRANSACTION DETAIL

Select Details

Text Messages

TEXT MESSAGES

ACCOUNT	NAME	MOBILE #	MESSAGE	STATUS	DATE SENT	RESP RECEIVED	RESPONSE MEANING	DATE RECEIVED	DOC ID	CREATED DATE	STATUS MESSAGE
Pitney Bowes Energy	Samantha Turnbow	7144943798	Your appt is scheduled for 07/19/2017 at 12:00 AM. Press c to confirm and R to reschedule.	Delivered	Apr 4 2025 1:42PM	N			25256692	4/4/2025 12:00:00 AM	Delivered
Pitney Bowes Energy	Alex Gregory	7144943798	Your appt is scheduled for 07/19/2017 at 12:00 AM. Press c to confirm and R to reschedule.	Cancelled		N			25256693	4/4/2025 12:00:00 AM	Cancelled
Pitney Bowes Energy	Tiffany Tobin	7144943798	Your appt is scheduled for 07/19/2017 at 12:00 AM. Press c to confirm and R to reschedule.	Cancelled		N			25256694	4/4/2025 12:00:00 AM	Cancelled

The Voice Messages dropdown shows a list of IVR messages that were generated as part of Relay Unify uDeliver.

SUBMISSION TRANSACTION DETAIL

Select Details

Voice Messages

VOICE MESSAGES

ACCOUNT	NAME	PHONE #	MESSAGE	STATUS	DATE SENT	RESP RECEIVED	RESPONSE	MEANING	DATE RECEIVED	DOC ID	CREATED DATE	STATUS MESSAGE
---------	------	---------	---------	--------	-----------	---------------	----------	---------	---------------	--------	--------------	----------------

The Relay Unify uSecure tab shows a list of Relay Unify uSecure messages, if applicable.

SUBMISSION TRANSACTION DETAIL

Select Details

uSecure

USECURE

DATE	ACTION	MESSAGE	USER	PROGRAM	IP STACK
4/3/2025 2:40:42 PM	Open	User was authorized	Admin	RPPrintapp	192.168.1.100
4/3/2025 2:40:42 PM	Read	Virtual file 20250307153837260PB_Gas opened	Admin	RPPrintapp	192.168.1.100
4/3/2025 9:40:44 AM	Print	Print Job 8156 printed to \\Transqa2\SUBMIT\PRT\Pitney Bowes Gas_s15641_p_8156_AllDocsPDF.pdf	System	RPPrintapp	192.168.1.100
4/3/2025 9:40:45 AM	Print	Print Job 8156 Protected \\Transqa2\SUBMIT\PRT\Pitney Bowes Gas_s15641_p_8156_AllDocsPDF.pdf	System	RPPrintapp	192.168.1.100

The Print Jobs dropdown shows a list of all print jobs that contain documents from the submission, including reprints. The # Docs column refers to the total number of documents prior to any merging in the print job.

SUBMISSION TRANSACTION DETAIL

Select Details

Print Jobs

PRINT JOBS

PRT JOB ID	STATUS	PRINTER	CONFIGURATION	# DOCS	CREATE DATE	COMP DATE	OUTPUT FILE
8162	Print Manager	Uluro Native PDF Output	All Docs PDF Output	6	4/4/2025 1:42:00 PM	4/4/2025 1:42:03 PM	\\Transqa2\SUBMIT\PRT\<#SubDescription>_s<#Submid>_p_<#prtjobid>_AllDocsPDF
8163	Print Manager	Uluro Native PDF Output	Print to Dir from file name	6	4/4/2025 1:42:00 PM	4/4/2025 1:42:06 PM	\\Transqa2\SUBMIT\PRT\[testing33928]prtjobid_<#prtjobid>_testing33928.pdf

The Consumables dropdown shows a list of consumables. This includes forms, envelopes, and inserts.

SUBMISSION TRANSACTION DETAIL

Select Details

Consumables

CONSUMABLES

TYPE	ITEM #	DESCRIPTION	QUANTITY	WINDOW	COLOR	PERFORATION	SIZE
Paper	N/A	Standard 24 lb paper blank	8				
Envelope	N/A	BRE (#9)	6				
Envelope	N/A	Number 10 Window	6				

The Submission Flow dropdown shows a list of the statuses that a submission has been through as well as those it may still go through. Custom statuses will be listed and marked here.

Hold For Confirmation

SUBMISSION TRANSACTION DETAIL

Select Details

Submission Flow

SUBMISSION FLOW

STATUS	ORDER	STATUS DATE	CUSTOM
Received	100	4/4/2025 1:41:31 PM	☐
BreakPack	400	4/4/2025 1:41:31 PM	☐
AutoJob	1200	4/4/2025 1:41:33 PM	☐
Ready to Print	1700	4/4/2025 1:41:40 PM	☐
Print Manager	1750	4/4/2025 1:42:40 PM	☐
Partial Print	1800		☐

Submissions that go to Hold for Confirmation status are due to a duplicate MD5Sum to another file previously run through Relay Unify. There is now a permission that can be assigned to Relay Unify users to prevent them from Marking the File for Processing, which will process the duplicate data file.

Under the User Management tab via the user name in the top right corner in uControl web, choose the user then go to the Feature Permissions tab. There you can click on the Add a Feature button and you'll see **Release From Hold for Confirmation** that gives the user the ability to click the Mark for Processing button on that submission in uControl web. If the user does not have that permission, the user won't even be able to click on the Mark for Processing button.

SUBMISSION DETAILS

MARK FOR PROCESSING

SUBMISSIONS

SUBMISSION 15647

SUBMISSION DETAILS

SUBMISSION ID:

15647

STATUS:

Hold for Confirmation

TYPE:

Pitney Bowes Energy

CUSTOMER NAME:

Default Client

EXTERNAL CUSTOMER #:

MAP:

Tyler Demo/RU Electric.nmp

EXPIRES:

N

EXPIRATION DATE:

SUBMISSIONS WITH MATCHING MD5 SUM

ID	SUBMISSION	STATUS
15646	Pitney Bowes Energy	Print Manager
15643	Pitney Bowes Energy	Print Manager

FILE INFORMATION

DATE RECEIVED:

4/4/2025 2:08:48 PM

RECEIVED VIA:

FTP

FILE NAME:

20250404140848950PB_Energy

ORIG FILE NAME:

RUElectricData_overflowdetails.csv

MD5 SUM:

68A2FFAD24DFB713421D5AA43AB4DC62

TOTAL DOCS:

0

TOTAL CLEANSED:

0

TOTAL PAGES:

0

JOB & PRINT INFORMATION

JOB STATUS:

PS JOB ID:

None

FORM:

Standard 24 lb paper blank

WEB APPROVAL

APPROVED:

DATE APPROVED:

APPROVED BY:

APPROVAL REASON:

SUBMISSION TRANSACTION DETAIL

Select Details

Transaction Audit Log

Add Feature

Select a feature below. You will then be prompted to modify permissions.

Gray - No permission granted

Blue - Explicit or inherited permission granted

All Features

Administrative

User And Group Security

User Management

Group Management

UControl Settings

Submission Management

View Submissions

Transaction Management

Merge Submissions

Resubmit Submissions

Cancel Submission

Delete Submission

Release from Hold for Confirmation

Extract Emails

Job Management

View Jobs

Transaction Management

Reset Submissions to Job Select

Resubmit All Submissions on Job

Create Print Job

View Details

Audit Report

Distribution Report

Save

Mark Complete

Cancel Job

Print Jobs

View Print Jobs

Transaction Management

Reset Print Job

Cancel Print Job

Print Audit Report

Production Schedule

Submissions

View Submissions

Change Status

Show Graph/Inserter

Cancel

Current Relay Unify users will have this unchecked but still have permission so that existing users still function as before. Once an edit is made on the user and the Save button is clicked, this box will need to be checked for a user to have this permission.

Pitney Bowes

Relay Unify Workflow Manual to Setup and Process Jobs User Guide

January 2025

Page 94 of 209

When it is marked for processing in uControl web, the user that marked it is recorded in the transaction audit log.

SUBMISSIONS ▶ SUBMISSION 15647

SUBMISSION DETAILS

SUBMISSION ID: 15647
STATUS: BreakPack
TYPE: Pitney Bowes Energy

CUSTOMER NAME: Default Client
EXTERNAL CUSTOMER #:
MAP: Tyler Demo\RU Electric.nmp

EXPIRES: N
EXPIRATION DATE:

EXCLUSIONS

	ESTATEMENT = N	ESTATEMENT = Y	TOTAL
Non-Excluded	0	0	0
No Mail	0	0	0
Omit	0	0	0
Exclude	0	0	0
Total	0	0	0

FILE INFORMATION

DATE RECEIVED: 4/4/2025 2:08:48 PM
RECEIVED VIA: FTP
FILE NAME: 20250404140848950PB_Energy
ORIG FILE NAME: RUElectricData_overflowdetails.csv

MD5 SUM: 68A2FFAD24DFB713421D5AA43AB4DC62
TOTAL DOCS: 0
TOTAL CLEANSSED: 0
TOTAL PAGES: 0

JOB & PRINT INFORMATION

JOB STATUS:
PS JOB ID: None

FORM: Standard 24 lb paper blank

WEB APPROVAL

APPROVED:
DATE APPROVED:

APPROVED BY:
APPROVAL REASON:

SUBMISSION TRANSACTION DETAIL

Select Details
Transaction Audit Log

TRANSACTIONS

ID	DATE	TRANSACTION DESCRIPTION	USER NAME
14502451	4/4/2025 2:08:48 PM	Received by FTP on TRANSQA2	System
14502452	4/4/2025 2:08:49 PM	URecSub	System
14502453	4/4/2025 2:08:49 PM	Received	System
14502609	4/4/2025 3:24:42 PM	Marked for processing by administrator	administrator
14502610	4/4/2025 3:24:42 PM	BreakPack	System
14502611	4/4/2025 3:24:43 PM	Assigned to Breakpack on 192.168.1.100	System

Submission Cancelled Logging

If a Relay Unify user cancels a submission the Relay Unify User who cancelled the file is logged in the Submission Details table in the DB. The username of the Relay Unify user is also displayed in the Transaction Audit Log within uControl web.

SUBMISSIONS ▶ SUBMISSION 15647

SUBMISSION DETAILS

SUBMISSION ID: 15647

STATUS: Submission Cancelled

TYPE: Pitney Bowes Energy

CUSTOMER NAME: Default Client

EXTERNAL CUSTOMER #: Tyler Demo\RU Electric.nmp

MAP:

EXPIRES: N

EXPIRATION DATE:

EXCLUSIONS

	ESTATEMENT = N	ESTATEMENT = Y	TOTAL
Non-Excluded	6	0	6
No Mail	0	0	0
Omit	0	0	0
Exclude	0	0	0
Total	6	0	6

FILE INFORMATION

DATE RECEIVED: 4/4/2025 2:08:48 PM

RECEIVED VIA: FTP

FILE NAME: 20250404140848950PB_Energy

ORIG FILE NAME: RUElectricData_overflowdetails.csv

MD5 SUM: 68A2FFAD24DFB713421D5AA43AB4DC62

TOTAL DOCS: 6

TOTAL CLEANSED: 0

TOTAL PAGES: 8

JOB & PRINT INFORMATION

JOB STATUS: Cancelled

PS JOB ID: 10159

FORM: Standard 24 lb paper blank

WEB APPROVAL

APPROVED:

DATE APPROVED:

APPROVED BY:

APPROVAL REASON:

SUBMISSION TRANSACTION DETAIL

Select Details

Transaction Audit Log

TRANSACTIONS

ID	DATE	TRANSACTION DESCRIPTION	USER NAME
14502617	4/4/2025 3:24:44 PM	AutoJob	System
14502620	4/4/2025 3:25:00 PM	Ready to Print	System
14502623	4/4/2025 3:25:23 PM	Print Manager	System
14502636	4/4/2025 3:32:04 PM	Cancelled by administrator	administrator
14502637	4/4/2025 3:32:20 PM	Job Status change to Submission Cancelled	System

Resending Emails

From the email dropdown, you can resend emails.

Select an email and right-click on the grid.

There are 3 options.

Resend Selected Email will resend the one email that was selected when you right clicked.

EMAILS										
DOCUMENT	EMAIL ADDRESS	SUBJECT	CREATED	EMAILED	STATUS MESSAGE	TRACKED	OPENED	CLICKS	OPT OUT	BOUNCED
	ttobin@transfrm.com	Duplicate Data File	4/4/2025 2:08:50 PM		Submission canceled by administrator			0		
	tylerm@transfrm.com	Submission is Received	4/4/2025 3:24:50 PM		Submission canceled by administrator			0		
	ttobin@transfrm.com	Report Group	4/4/2025 3:24:50 PM		Submission canceled by administrator			0		
	ttobin@transfrm.com	Breakpack Reports	4/4/2025 3:24:50 PM		Submission canceled by administrator			0		
25256700	tylerm@transfrm.com	Send End User IIRL Email	4/4/2025 3:25:10 PM		Submission canceled by administrator			0		
	ttobin@transfrm.com	Submit	25 3:25:10 PM		Submission canceled by administrator			0		
25256698	tylerm@transfrm.com	Send En	25 3:25:10 PM		Submission canceled by administrator	✓		0		
25256699	tylerm@transfrm.com	Send En	25 3:25:10 PM		Submission canceled by administrator	✓		0		
								First	Prev	1
								Next	Last	

Click Yes to confirm and the email selected will be resent.

Confirm

Are you sure you want to resend this email?

YesNo

Confirm

Are you sure you want to resend ALL email for this submission? Only sent emails will be resent

YesNo

Resend All Emails will mark all emails to be resent. This only applies to emails that have been sent already.

Click Yes to confirm and all the emails previously sent will be resent.

View Email Details will show you the body of the email chosen, timestamp, subject, etc.

Email

INFORMATION

DOCUMENT:

CREATED:

EMAILED ON:

EMAIL ADDRESS:

SUBJECT:

STATUS MESSAGE:

4/4/2025 3:24:50 PM

tylerm@transfrm.com

Submission is Received

Submission canceled by administrator

BODY

Default Client Submission: Pitney Bowes Energy 15647

Hold Email Events

If the setting to Hold Email Events is checked within a submission type, the email events will be in Hold status and the individual emails for those events will not be created.

This applies to the email events set up under the email tab as well as the SLA email events. This does not apply to Relay Unify uDeliver (HTML) emails or payment emails.

You cannot right click and send the emails on Hold. You can go to the Submission in uSetup and uncheck the Hold Email Events checkbox and continue to process the submission further. Or resubmit with the checkbox unchecked to have the emails sent. You can resend emails, text and IVR from their respective dropdowns under Submission Transaction Detail however.

EMAIL NOTIFICATIONS - GENERAL SETTINGS

5115 Pitney Bowes34218 PB_Gas

Email Notification SettingsEmail Notification EventsEmail Tracking

EMAIL NOTIFICATION SETTINGS

☒ Hold Email Events ⓘ

☐ Combines End User PDF Emails ⓘ

PDF Name Template

SaveCancel

View History

SUBMISSION TRANSACTION DETAIL

Select DetailsEmail Events

EMAIL EVENTS

ID	CREATED	STATUS	PROCESSED	EMAIL ADDRESS	SUBJECT	BODY
974955	4/5/2025 8:43:30 PM	Hold		tylerm@transfrm.com	Submission is Received	#CUSTNAME# Submission: #SUBNAME# #SUBMID#
974956	4/5/2025 8:43:34 PM	Hold		ttobin@transfrm.com	Breakpack Reports	#CUSTNAME# Submission: #SUBNAME# #SUBMID#
974957	4/5/2025 8:43:34 PM	Hold		ttobin@transfrm.com	Report Group	#CUSTNAME# Submission: #SUBNAME# #SUBMID#
974958	4/5/2025 8:43:40 PM	Hold			Send End User PDF Email	#CUSTNAME# Submission: #SUBNAME# #SUBMID# Account: #SYS_ACCT_ID# #SYS_NAME# #SYS_BALANCE#
974959	4/5/2025 8:43:40 PM	Hold			Send End User URL Email	#CUSTNAME# Submission: #SUBNAME# #SUBMID# Account: #SYS_ACCT_ID# #SYS_NAME# #SYS_BALANCE# UR
974960	4/5/2025 8:43:40 PM	Hold		ttobin@transfrm.com	Submission Ready for Print	#CUSTNAME# Submission: #SUBNAME# #SUBMID#

The emails generated will then be listed in the Emails dropdown in the submission details in uControl web.

Resubmitting Submissions

A user can resubmit a submission to be processed from the beginning of the workflow using the original data file by right clicking on a submission and selecting Resubmit in uControl web.

FILTER & SETTINGS

☐ Auto Refresh

Interval 10

Refresh

Records to Display

Total 50

Apply

Status Colors

Submission Tickets

	Id	Job ID	Customer	SubType	Received	Submission	Ext Cust Num	Regulatory	Status	# of Docs	BP %	Location	Presort	# of Pages	Form
☒	15651	10162	Pitney Bowes	34223	4/5/2025 8:50:18 PM	Relay Unify Electric			Print Manager	6	100	Connecticut		8	Standard 24 lb paper bla...
☐	15649		Pitney Bowes	34218	4/5/2025 8:50:01 PM	Pitney			Submission Cancelled	32	100	Connecticut		32	Standard 24 lb paper blank
☐	15650	10161	Pitney Bowes	34218	4/5/2025 8:50:01 PM	Pitney			Print Manager	32		Connecticut		32	Standard 24 lb paper blank
☐	15648	10160	Default Client	34233	4/5/2025 8:43:31 PM	Pitney			Print Manager	6	100	Connecticut		8	Standard 24 lb paper blank
☐	15647	10159	Default Client	34233	4/4/2025 2:08:49 PM	Pitney			Submission Cancelled	6	100	Connecticut		8	Standard 24 lb paper blank
☐	15646	10158	Default Client	34233	4/4/2025 1:41:32 PM	Pitney Bowes Energy			Print Manager	6	100	Connecticut		8	Standard 24 lb paper blank
☐	15645	10157	Default Client	34232	4/4/2025 1:41:03 PM	Relay Unify Gas			Print Manager	32	100	Connecticut		32	Standard 24 lb paper blank
☐	15644	10156	Default Client	34232	4/4/2025 10:35:12 AM	Relay Unify Gas			Print Manager	32	100	Connecticut		32	Standard 24 lb paper blank
☐	15643	10155	Default Client	34233	4/4/2025 10:34:32 AM	Pitney Bowes Energy			Print Manager	6	100	Connecticut		8	Standard 24 lb paper blank
☐	15642	10154	April 3rd Testing - WebuSetup	34231	4/3/2025 11:21:56 AM	Testing Basic Setup			Print Complete	6	100	Black & White		6	
☐	15640		Pitney Bowes	34218	4/3/2025 9:39:54 AM	Pitney Bowes Gas			Submission Cancelled	32	100	Connecticut		32	Standard 24 lb paper blank
☐	15641	10153	Pitney Bowes	34218	4/3/2025 9:39:54 AM	Pitney Bowes Gas			Print Manager	32		Connecticut		32	Standard 24 lb paper blank
☐	15639	10152	Pitney Bowes	34223	4/2/2025 4:30:00 PM	Relay Unify Electric			Print Manager	6	100	Connecticut		8	Standard 24 lb paper blank
☐	15637		Pitney Bowes	34218	4/2/2025 2:29:36 PM	Pitney Bowes Gas			Submission Cancelled	32	100	Connecticut		32	Standard 24 lb paper blank
☐	15638	10151	Pitney Bowes	34218	4/2/2025 2:29:36 PM	Pitney Bowes Gas			Print Manager	32		Connecticut		32	Standard 24 lb paper blank

First

Prev

1

2

3

4

Next

Last

Users can also resubmit all submissions on a job from the View Jobs tab. Please refer to the View Jobs tab section for further information.

In addition, a reason can be required upon resubmitting. This feature can be enabled or disabled. To enable it, go to the Settings menu in uControl and select Require Reason on Resubmit. When enabled, there will be a checkmark beside it.

Only Admins can enable or disable this.

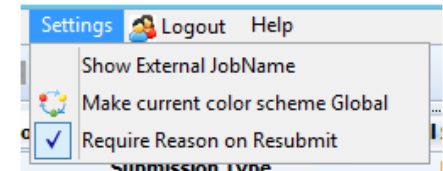
Once the resubmit is confirmed, the user will need to enter a reason. The reason gets put into the transactions of the original submission. If there were multiple resubmits, all will be listed.

Enter Resubmit Reason

Reason for Resubmit
Put the reason here. It cannot be blank. Up to 100 characters.

OK

The reason is only required on resubmits from the View All Submissions tab in uControl. Only one reason is required when resubmitting multiple submissions at once.



Submission Transactions

Submission Information

Sub ID: 2545
Status: Print Manager

Type: UluroBank&Trust

Customer: Uluro Training

External Customer #: 12345

Received: 10/9/2018 9:58:56 AM
Via: FTP

Map: Uluro Training\Uluro Bank & Trust.nmp

Docs: 9
Cleansed: 6
Pages: 34

File Dir: \TransQa2\Submit\

File Name: 20180823155838583BankTrust

Orig File: Bank and Trust Data_training.csv

MD5 Sum: 7436B77C263C828451AFC922FF8EC45C

PS Jobid: 1763
Job Status: Print Manager

Form: Standard 24 lb paper blank

Approved: ☒
Date: 10/9/2018 10:00
By: admin

Reason: tt

Exclusions

*	eState=N	eState=Y	Total
▶ Non-Excluded	6	3	9
No Mail	0	0	0
Omit	0	0	0
Exclude	0	0	0
Total	6	3	9

Transactions
Reports
Emails
Text Messages
HTML Emails
Voice Messages
uSecure
Print Jobs
Consumables
Subm

ID	Date	Transaction Description
210612	10/9/2018 9:59:32	Saved to Database
210613	10/9/2018 9:59:32	Breakpack Complete
210614	10/9/2018 9:59:32	Awaiting Approval
210615	10/9/2018 10:00:15	Cleansing
210616	10/9/2018 10:00:31	AutoJob
210617	10/9/2018 10:01:00	Presort
210618	10/9/2018 10:01:17	Ready to Print
210619	10/9/2018 10:02:00	Print Manager
210645	10/9/2018 10:23:30	Resubmitted by Administrator testing
210654	10/9/2018 10:25:17	Resubmitted by Administrator Put the reason here. It cannot be blank. Up to 100

You can select multiple submissions in uControl web by clicking the desired submissions. If it has been selected there will be a check on the far left to mark that it has been selected. The one you are currently on has a bold frame around it.

If multiples are selected, once you right click, you can still Resubmit, Cancel, or Delete. It will go one by one for all the submissions selected.

Select Resubmit. It will ask you to confirm that you want to resubmit each individual submission. Click yes for each that you do.

FILTER & SETTINGS

Auto Refresh

Interval 10

Refresh

Records to Display 50

Apply

Status Colors

Submission Tickets

	Id	Job ID	Customer	SubTypeId	Received	Submission	Ext Cust Num	Regulatory	Status	# of Docs	BP %	Location	Presort	# of Pages	Form
☐	15651	10162	Pitney Bowes	34223	4/5/2025 8:50:18 PM	Relay Unify Electric			Print Manager	6	100	Connecticut		8	Standard 24 lb paper blank
☒	15649		Pitney Bowes	34218	4/5/2025 8:50:01 PM	Pitney Bowes Gas			Submission Cancelled	32	100	Connecticut		32	Standard 24 lb paper blank
☒	15650	10161	Pitney Bowes	34218	4/5/2025 8:50:01 PM	Pitney Bowes Gas			Print Manager	32		Connecticut		32	Standard 24 lb paper blank
☒	15648	10160	Default Client	34233	4/5/2025 8:43:31 PM	Pitney Bowes Energy			Print Manager	6	100	Connecticut		8	Standard 24 lb paper blank
☒	15647	10159	Default Client	34233	4/5/2025 8:43:31 PM	Pitney Bowes Energy			Submission Cancelled	6	100	Connecticut		8	Standard 24 lb paper blank
☐	15646	10158	Default Client	34233	4/5/2025 8:43:31 PM	Pitney Bowes Energy			Print Manager	6	100	Connecticut		8	Standard 24 lb paper blank
☐	15645	10157	Default Client	34232	4/5/2025 8:43:31 PM	Relay Unify Gas			Print Manager	32	100	Connecticut		32	Standard 24 lb paper blank
☐	15644	10156	Default Client	34232	4/5/2025 8:43:31 AM	Relay Unify Gas			Print Manager	32	100	Connecticut		32	Standard 24 lb paper blank
☐	15643	10155	Default Client	34233	4/5/2025 8:43:31 AM	Relay Unify Gas			Print Manager	6	100	Connecticut		8	Standard 24 lb paper blank
☐	15642	10154	April 3rd Testing - WebuSetup	34231	4/3/2025 11:21:49 PM	Pitney Bowes Energy			Print Complete	6	100	Black & White		6	
☐	15640		Pitney Bowes	34218	4/3/2025 9:39:54 AM	Pitney Bowes Gas			Submission Cancelled	32	100	Connecticut		32	Standard 24 lb paper blank
☐	15641	10153	Pitney Bowes	34218	4/3/2025 9:39:54 AM	Pitney Bowes Gas			Print Manager	32		Connecticut		32	Standard 24 lb paper blank
☐	15639	10152	Pitney Bowes	34223	4/2/2025 4:30:00 PM	Relay Unify Electric			Print Manager	6	100	Connecticut		8	Standard 24 lb paper blank
☐	15637		Pitney Bowes	34218	4/2/2025 2:29:36 PM	Pitney Bowes Gas			Submission Cancelled	32	100	Connecticut		32	Standard 24 lb paper blank
☐	15638	10151	Pitney Bowes	34218	4/2/2025 2:29:36 PM	Pitney Bowes Gas			Print Manager	32		Connecticut		32	Standard 24 lb paper blank

FirstPrev1234NextLast

Resubmit Warning

Are you sure you want to resubmit submission 15647?

Yes

No

If they have already been part of a job, you will get this message. You can choose Yes or No. You can have multiple submissions selected, it will ask you Yes to All or No to All when you want to Resubmit. It will then ask if you wish to cancel the original submissions. You can do this with Yes to All or No to All as well.

?

Resubmit Warning

Would you like to cancel the original submission 15651?

Yes

No

No to All

Yes to All

?

Resubmit Warning

The submission 15651 is already on a job. Resubmitting this submission may have undesired consequences. Are you sure you want to resubmit this submission?

Yes

No

It will then ask if you wish to delete the original submissions. It will ask you the same, Yes to All/ No to All, going from cancel to delete for each submission checked.

?

Resubmit Warning

Would you like to delete the original submission 15651?

Yes

No

No to All

Yes to All

Submissions must be cancelled before they can be deleted. Otherwise, you'll get a warning telling you that you cannot delete it until the submission has been cancelled.

?

Deleted Warning

Only cancelled submissions can be deleted.

Ok

Cancel

Submissions Tab in uSetup

Allows you to see submissions of this submission type that have been run.

The colors will match what has been set up in uControl. They can be changed by clicking on the submission status in the Color Status & Apply Color section and selecting the desired color.

The columns can be sorted by clicking on the headings.

Records – Change this number to how many submissions you want displayed. Click the **Apply** button for the change to take effect.

Cancelled – Check this box to show cancelled status submissions in the list of records. Click the **Apply** button for the change to take effect.

MANAGE JOB TRACKING

5115 Pitney Bowes34218 PB_Gas

SUBMISSIONS

FILTER RECORDS & COUNT

☐ Cancelled

Records100

Apply

COLOR STATUS & APPLY COLOR

Submission Status

ID	RECEIVED	PRESORT	FORM	STATUS	FILE NAME	EVENTS HELD
15534	3/7/2025 3:51:34 PM		Standard 24 lb paper blank	Ready to Print	20250307153837260PB_Gas	6
15595	3/21/2025 1:25:58 PM		Standard 24 lb paper blank	Ready to Print	20250307153837260PB_Gas	6
15596	3/21/2025 1:38:30 PM		Standard 24 lb paper blank	Ready to Print	20250307153837260PB_Gas	6
15599	3/21/2025 1:40:15 PM		Standard 24 lb paper blank	Ready to Print	20250307153837260PB_Gas	6
15600	3/21/2025 1:40:26 PM		Standard 24 lb paper blank	Ready to Print	20250307153837260PB_Gas	6
15626	3/31/2025 11:51:35 AM		Standard 24 lb paper blank	Ready to Print	20250307153837260PB_Gas	0
15638	4/2/2025 2:29:35 PM		Standard 24 lb paper blank	Print Manager	20250307153837260PB_Gas	0
15641	4/3/2025 9:39:53 AM		Standard 24 lb paper blank	Print Manager	20250307153837260PB_Gas	0
15650	4/5/2025 8:50:00 PM		Standard 24 lb paper blank	Print Manager	20250307153837260PB_Gas	3

Showing 1 to 9 of 9 entries

Previous

1

Next

Click on a submission to show the submission details.

MANAGE JOB TRACKING

5115 Pitney BowesQ 34218 PB_Gas

SUBMISSIONS ▶ SUBMISSION 15534

SUBMISSION DETAILS

SUBMISSION ID:15534

STATUS:Ready to Print

TYPE:FTP

CUSTOMER:Pitney Bowes

MAP:

EXPIRES:

EXPIRATION DATE:

Tyler Demo\pb training.nmp

N

FILE INFORMATION

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

RECEIVED VIA:FTP

FILE NAME:20250307153837260PB_Gas

ORIG FILE NAME:Normal_1_of_1.pdf

MD5 SUM:6F06EF383FD7A2DCDE63B2BA0410216B

TOTAL DOCS:32

TOTAL PAGES:32

JOB & PRINT INFORMATION

JOB STATUS:Ready to Print

PS JOB ID:10066

FORM:

Standard 24 lb paper blank

WEB APPROVAL

APPROVED:

DATE APPROVED:

APPROVED BY:

APPROVAL REASON:

SUBMISSION TRANSACTION DETAIL

Select Details

Transactions

TRANSACTIONS

ID	DATE	TRANSACTION DESCRIPTION
14459760	3/7/2025 3:51:34 PM	Resubmit of 15533
14459762	3/7/2025 3:51:34 PM	BreakPack
14459763	3/7/2025 3:51:35 PM	Assigned to Breakpack on 192.168.1.100
14459764	3/7/2025 3:51:35 PM	Begin Breakpack
14459765	3/7/2025 3:51:35 PM	Delimited Parser V2
14459766	3/7/2025 3:51:35 PM	Delimited data will be trimmed!

Create a Job

This section is for manually combining, householding, or creating jobs. You can get there by checking the box in the filters to the left of the screen. Only submissions in JobSelect status will appear here. For a submission to be in Job Select status, the setting for Automatically Create a Job must be unchecked in the submission type.

INCOMING DATA (FILE RECEIPT)

☒ FTP

FTP Directory
\\TransQa2\Submit\FTP\Tyler Demo\PB Training\

☒ Web

Web Directory
\\TransQa2\Submit\Web\Tyler Demo\PB Training\

☐ Email

Email Directory

Map Name
Tyler Demo\pb training.nmp

Preprocess Program
Training\SUCCESS.bat \$FPATH \$FILE

Postprocess Program

☐ Automatically create a Job (job id assigned in AutoJob Status)

FILTERS

Hide

COMMON FILTERS

☒ Create a Job

Customer
Pitney Bowes

Submission Type
All

Status
JobSelect

Location
All

Submission Id

Job Id

ADDITIONAL FILTERS

☐ Use Receive Date

From Date
03/20/2023

To Date
03/20/2023

File Name

Original File Name

External Job #

Apply Filter

Reset Filter

Save Settings

Reset Settings

SETTINGS

☐ Auto Refresh

Interval
5

Refresh

Records to Display
Total
50

Apply

Status Colors

Submission Tickets

CREATE JOB

Presort Types
<NONE>

Household Types
<NONE>

Print Location

Job Type

☐ Save Default

	Id	Job ID	Customer	SubType	Received	Submission	Regulatory	Status	# of Docs	BP %	Location	Presort	# of Pages
☐	15658		Pitney Bowes	34218	4/7/2025 11:18:43 AM	Pitney Bowes Gas		JobSelect	32	100	Connecticut		32
☐	15657		Pitney Bowes	34218	4/7/2025 11:18:12 AM	Pitney Bowes Gas		JobSelect	32	100	Connecticut		32
☐	15656		Pitney Bowes	34218	4/7/2025 11:17:56 AM	Pitney Bowes Gas		JobSelect	32	100	Connecticut		32
☐	15655		Pitney Bowes	34218	4/7/2025 11:16:42 AM	Pitney Bowes Gas		JobSelect	32		Connecticut		32

First

Prev

1

Next

Last

Pitney Bowes

Relay Unify Workflow Manual to Setup and Process Jobs User Guide

January 2025

Page 105 of 209

Once in Job Select status, the submission will appear in the Create a Job section.

The columns can be sorted by clicking on the headings.

Presort Type – This dropdown will list all of the templates previously created. Select the presort type for the job. This will need to be the same presort type selected on each submission that will be manually placed on the job being created. If **Save Default** is checked, then the selection will remain for all jobs created unless altered until the program is closed.

Household Type – This is the criteria used for householding the documents. Select Account#, Address, Account# and Address, or Name and Address.

Print Location – Select the print location for the job. This can be blank.

Location – This dropdown contains all the locations created using uSetup or PM. Select a specific location to see only the jobs assigned to that location. To assign a location to a job, select that desired location on the submission type, within the Relay Unify Print Manager tab.

Submission Type – This allows you to see only submission for a specific submission type.

Customer – This allows you to see only one customer's submissions.

Use Receive Date – Check this to use the **From** and **To** date fields. Once checked, enter the date range and click Apply Filter. Only submissions within the date range will be displayed. This is using the date in the received column in the Create Job Window.

External Customer # – If an external customer # was entered in uSetup when creating a client, this will be what's displayed. It is possible to rename this to something else, so the heading of the column could be a different title. You can use % for wildcards.

Reset Filter/ Settings – Clicking these buttons will reset the filter settings to the default settings.

Refresh – Click this button to manually refresh the results on the dashboard.

Select the submissions by individually clicking the submissions that will become one job.

Household – Click this to household submissions together, householding the documents into one envelope based on the **Household Type** selected in the dropdown above. This will ask for a priority submission. That submission will be used as the first page(s) in the merged document.

Combine – Click this to place the selected submissions on one job. The total number of documents will remain the same; this will not be merged. This is usually done for presort discount.

You can right click to cancel, resubmit, delete, combine, or household a submission from this tab the same way you can from the View Submissions tab.

Within the global settings option in the Configure menu of uSetup, you can set up a warning for jobs less than a specified number of documents.

Check the **Warn when creating jobs if document count <** to enable the warning. Enter the minimum number of documents in the field.

When creating householding or combine job manually in uControl on the Create a Job tab, a warning will appear if the number of documents on the job is less than the value entered in the global settings.

GLOBAL SETTINGS

Global Settings

GLOBAL SETTINGS

☒ Warn when creating jobs if document count <

500

Save

Warning

The number of documents is less than 500.

Do you still want to create this job?

Ok

Cancel

Hold & Release

This is for Householding across submission types within a customer.

Enabled – Check this for this setting to take effect.

Merge On: Select the field(s) to merge the data on:
Account#, Address, Account# and Address, or Name and Address.

Max Days – Once the submission has been created, after the days specified here, it will merge what has been held to that point.

Minimum Balance – The minimum balance for the document(s) to merge on.

Merge Group – Select a previously used merge group or type in a new one. If this is blank the merge will only take effect within this submission type and not across submission types. The merge can only be within a client when using a merge group. If the same merge group is entered across clients, the group will only take effect within each client separately.

Relay Unify will look for a document that contains an address block. That document will be the priority, or first page(s), of the merged document. If all documents being merged have an address block, one will be selected by Relay Unify as the priority submission.

As documents fit the criteria the document(s) will be placed on jobs when the Relay Unify DoHoldNRel SQL Server Job runs. The submission will remain in Hold and Release status until all documents in the data file have been merged or released according to the Minimum Balance or Max Days.

The screenshot shows a web application interface for 'HOLD AND RELEASES'. At the top, there are tabs for 'Hold & Release' and 'Manage Accounts'. The 'Hold & Release' tab is active. Below the tabs, there is a 'GENERAL SETTINGS' section. It includes a checkbox for 'Enabled'. Below that is a 'Merge On' dropdown menu. Further down are input fields for 'Max Days' (set to 0) and 'Minimum Balance' (set to 0.00). A label 'Maximum number of days to wait before processing' is next to the 'Max Days' field. Below these is a 'MERGE GROUP' section with a 'Merge Group' dropdown and a '+' button. At the bottom of the settings panel are 'Save' and 'Cancel' buttons. To the right of the settings panel is a 'View History' button. The top right of the interface shows user information: '5115 Pitney Bowes' and '34218 PB_Gas'.



Tips:

To automate merges within a client's submission the way merge jobs can be manually created, use zero for both the Max Days and Min Amt. This will merge all documents the next time the DoHoldNRel SQL jobs runs. The submission will not go to Ready to Print Status; it will go to Relay Unify Print Manager status so the submission will also need to be setup for Relay Unify Print Manager.

The **Manage Accounts** tab is used to allow identification of Accounts that are not to be included as part of Hold and Release.

If the Account has Hold & Release unchecked, then it will not be held.

If the record is removed, then it will be considered for hold and release.

HOLD AND RELEASES

5115 Pitney Bowes 34223 RU_Energy

Hold & Release Manage Accounts

ACCOUNTS

ACCOUNT NO	NAME	H & R
71698	Matthew Aaron	☒
71701	Alex Gregory	☒
71705	Brionna Abernathy	☒
269275	Clarence Acuna	☒
123454321	Samantha Turnbow	☒
1010123456789	Tiffany Tobin	☒

Showing 1 to 6 of 6 entries

Previous 1 Next

+ Add Account View History

View Jobs Tab

This tab is for viewing submissions from the job level.

Status – Select the status of the jobs to be displayed.

Presort Type – This dropdown will list all the templates previously created. Select the presort type to filter the jobs displayed.

Location – This dropdown contains all the locations created using uSetup or R.U.P.M. Select a specific location to see only the jobs assigned to that location.

Job ID – This is the Job ID that was assigned when the job was created using automation or manually. Enter the specific JobID to display.

Records to Display – Enter the total number of records that should be displayed on the dashboard.

Refresh – Click this button to manually refresh the results in the dashboard.

Relay™ Unify
Powered by Transformations

SETTINGS VIEW SUBMISSIONS **VIEW JOBS** VIEW PRINT JOBS PRODUCTION SCHEDULE

James Smith

Control | Jobs Management
Manage Jobs & Submissions

Uluro North America | Transqa2_QC server Change Context

FILTERS Hide

COMMON FILTERS

Status
<ALL OPEN>

Presort Type
<ALL>

Location
<ALL>

Job Id

Apply Filter Reset Filter

Save Settings Reset Settings

SETTINGS

Auto Refresh Interval 10 Refresh

Records to Display 50 Apply

Status Colors Reports

Id	Presort Type	Ext Job Name	Status	Created Date	Household By	# Docs	Max sheets	# Before Household	# Household	# UnHousehold
10163	None	Print Manager	4/5/2025 9:35:40 PM	Unhousehold	6	2	6	0	6	
10161	None	Print Manager	4/5/2025 8:50:20 PM	Unhousehold	32	1	32	0	32	
10160	None	Print Manager	4/5/2025 8:43:40 PM	Unhousehold	6	2	6	0	6	
10158	None	Print Manager	4/4/2025 1:41:40 PM	Unhousehold	6	2	6	0	6	
10157	None	Print Manager	4/4/2025 1:41:20 PM	Unhousehold	32	1	32	0	32	
10156	None	Print Manager	4/4/2025 10:35:20 AM	Unhousehold	32	1	32	0	32	
10155	None	Print Manager	4/4/2025 10:34:40 AM	Unhousehold	6	2	6	0	6	
10154	None	Print Complete	4/3/2025 11:22:00 AM	Unhousehold	6	1	6	0	6	
10153	None	Print Manager	4/3/2025 9:40:20 AM	Unhousehold	32	1	32	0	32	
10152	None	Print Manager	4/2/2025 4:30:20 PM	Unhousehold	6	2	6	0	6	
10151	None	Print Manager	4/2/2025 2:30:00 PM	Unhousehold	32	1	32	0	32	
10150	None	Print Manager	4/1/2025 4:29:00 PM	Unhousehold	32	1	32	0	32	
10148	None	Ready to Print	4/1/2025 8:48:00 AM	Unhousehold	6	1	6	0	6	
10147	None	Ready to Print	4/1/2025 8:46:00 AM	Unhousehold	6	1	6	0	6	
10146	None	Ready to Print	4/1/2025 8:43:00 AM	Unhousehold	4	1	4	0	4	

First Prev 1 2 3 4 Next Last

heybowes.transqa2.trans.loc:4443/submissiontypes/jobtracking/jobs

Reset Submissions to Job Select – Right click on the selected job and select this option to change the status of each submission on the job back to Job Select status. Those submissions will then need to be placed on a job using the Submissions Ready to be put on a Job tab. Jobs need to be in Ready to Print status for this functionality and jobs that were merged will not be eligible.

Resubmit ALL Submissions on Job – Right click on the selected job and select this option to resubmit every submission that is on that job. This option is for all bulk resubmits, so it doesn't have to be done by selecting all the submissions individually from the View All Submissions tab.

SETTINGS

☐ Auto Refresh

Interval 10

Refresh

Records to Display

Total 50

Apply

Status Colors

Reports

Id	Presort Type	Ext Job Name	Status	Created Date	Household By	# Docs	Max sheets	# Before Household	# Household	# UnHousehold
10164	None			4/3/2025 10:39 P...	Unhousehold	64	1	64	0	64
10163	None			4/3/2025 10:10 PM	Unhousehold	6	2	6	0	6
10161	None			4/3/2025 10:10 PM	Unhousehold	32	1	32	0	32
10160	None			4/3/2025 10:10 PM	Unhousehold	6	2	6	0	6
10158	None			4/3/2025 10:10 PM	Unhousehold	6	2	6	0	6
10157	None			4/3/2025 10:10 PM	Unhousehold	32	1	32	0	32
10156	None			4/3/2025 10:20 AM	Unhousehold	32	1	32	0	32
10155	None		Print Manager	4/4/2025 10:34:40 AM	Unhousehold	6	2	6	0	6
10154	None		Print Complete	4/3/2025 11:22:00 AM	Unhousehold	6	1	6	0	6
10153	None		Print Manager	4/3/2025 9:40:20 AM	Unhousehold	32	1	32	0	32
10152	None		Print Manager	4/2/2025 4:30:20 PM	Unhousehold	6	2	6	0	6
10151	None		Print Manager	4/2/2025 2:30:00 PM	Unhousehold	32	1	32	0	32
10150	None		Print Manager	4/1/2025 4:29:00 PM	Unhousehold	32	1	32	0	32
10148	None		Ready to Print	4/1/2025 8:48:00 AM	Unhousehold	6	1	6	0	6
10147	None		Ready to Print	4/1/2025 8:46:00 AM	Unhousehold	6	1	6	0	6

First

Prev

1

2

3

4

Next

Last

Reset Submissions to Job Select

Resubmit All Submissions on Job

View Detail

Create Print Job

Mark Complete

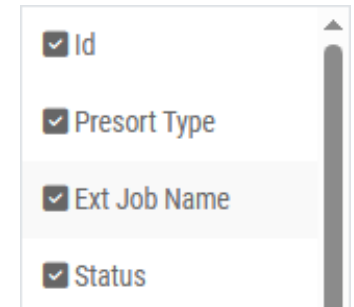
Cancel Job

The drop downs show the information accessible on the other tabs in uControl but focused on the job rather than the submission. The submissions on the job are listed on the Submissions drop down. The print jobs created are listed on the Print Jobs drop down. The Reports for the job will have all submission and job level reports that have been generated. The Transactions are for the job; the statuses the job has passed through.

SUB ID	DESCRIPTION	RECEIVE DATE	# DOCS	# CLEANSED	# PAGES	STATUS	FILE NAME
15655	Pitney Bowes Gas	04/07/2025	32	0	32	Ready to Print	20250307153837260PB_Gas
15656	Pitney Bowes Gas	04/07/2025	32	0	32	Ready to Print	20250307153837260PB_Gas

Show External Job Name

In the top left corner of the Settings menu, click the ellipsis to check Ext Job Name. This will display the column Ext Job Name on the View Jobs tab. Selecting it again will uncheck it and remove it from being displayed as a column.



External Document Interface

This is used for tracking documents added from outside of Relay Unify that only need to be displayed on the web. This process will create a submission and the document records for web display. These documents cannot be printed.

Data from an external system can be added into Relay Unify and tracked using the External Job Name. This can be updated using a Relay Unify uBridge job or by calling a stored procedure to input data into the appropriate database tables.

Database Tables in Relay Unify

ExtJobInt

The ExtJobInt table is the External Job interface table. The fields in the Table are:

ExtJobIntId – Bigint, AutoIncrement - Key

ExtJobNum – Varchar(40) - Original Job Number from external system – Indexed Unique (Unique for this table only)

JobDesc – Varchar(100) – Description of Job - Indexed

CustName – Varchar(100) - Customer Name

CLID – Bigint – Link to Relay Unify Client

Subtypeid – Bigint – Link to Relay Unify Subtype table

JobStatus – Varchar(2) – Starting Job Status

ReceiveDate – Datetime – Date and time Received

CurDate – Datetime – Date record added. - indexed

RecStatus – Varchar(1) – Record Status (N for new, P for Processed, E for Error) - indexed

ProcDate – Datetime – Date record processed

ErrorMessage – Varchar(200) – Error Message in processing

ExtJobStat

The ExtJobStat table is used to update the status on an external job. The fields in the table are:

ExtJobStatid – Bigint, Autoincrement - Key

ExtJobNum – Varchar(40) – Original job number form external system - Indexed

JobStatus – Varchar(2) – New Job Status

CurDate – Datetime – Date record added - indexed

RecStatus – Varchar(1) – Record Status (N for new, P for Processed, E for Error) - Indexed

ProcDate – Datetime – Date record processed

ErrorMessage – Varchar(200) – Error Message in processing

ExtJobDet

The ExtJobDet table is the detail records for the External job. The fields in this table are:

ExtJobDetId – Bigint, Autoincrement - Key

ExtJobNum – Varchar(40) – Link to ExtJobInt – Required - Indexed

AccountNo – Varchar(30) – Account number for Display

AcctName – Varchar(30) – Account Name

AccAddr1 – Varchar(30) – Address line 1

AccAddr2 – Varchar(30) – Address line 2

AccAddr3 – Varchar(30) – Address line 3

AccAddr4 – Varchar(30) – Address line 4

Acccity – Varchar(30) – Address city

AccState – Varchar(30) – Address state

AccCountry – Varchar(50) – Address country

AccZip – Varchar(50) – Address Zipcode

Docno – Integer – Document number in data - Required

PDFname – Varchar(1000) - Full path to PDF. required

StartPage – Integer – Start page in PDF. required

EndPage – Integer – End page in PDF. required

CurDate – Datetime – Date record added required - Indexed

RecStatus – Varchar(1) – Record Status (N for new, P for Processed, E for Error) required - Indexed

ProcDate – Datetime – Date record processed

ErrorMessage – Varchar(200) – Error Message in processing

Modified Tables

Submissions

Add field for ExtJobNum varchar(40) to link to ExtJobInt table

Documents

Add the following Fields

PDFName – Varchar(1000) – Full Path to PDF

PStartPage – Integer – Start page in PDF

PEndPage – integer – End page in PDF

Stored Procedures

ProcExtjob

This stored procedure will process the records in extJobInt table with recstatus = 'N'.

This will validate the Subtype and CLID. If Valid, then add submission in required status. If Subtype contains Job Template information, then create Job Template. Then set Recstatus to 'P', procdate to getdate() and errormessage to "

If Error Occurs write to errormessage field and set recstatus to 'E' and procdate to getdate()

ProcExtStat

This stored procedure will process the records in the ExtJobStat table with recstatus = 'N'.

This will validate the ExtJobNum and JobStatus. If extJobNum is valid then the Status on the Submission and Jobheader will be changed to the value of JobStatus and the Recstatus will be set to 'P', procdate to getdate() and errormessage to "

If either the ExtJobNum or JobStatus is invalid then Recstatus will be set to 'E', procdate to getdate() and the errormessage to the appropriate error.

ProcExtDet

This stored procedure will process the records in ExtjobDet with Recstatus = 'N'.

The ExtjobNum will be validated. If not valid then the recstatus will be set to 'E' and the error message will be 'invalid extjobnum' and procdate to getdate() . Existing records will be replaced based on docno.

If Valid, then detail records will be added using the information in the records. Lookup the Submid from ExtJobNum.

When complete the RecStatus will be set to 'P', procdate to getdate () and ErrorMessage to "".

DISPLAYADMINMAINPAGE

Change Stored Procedure to use Submission Status instead of Jobheader status or use Submission when jobheader status is deleted.

Relay UnifyWeb Modified Views

Customer Documents view must be refreshed for additional fields.

Submission's view must be refreshed for additional fields.

Programs

Web

If PNGDLL is changed then no change will be necessary to Web programs. The PNGDLL will handle finding the PDF and generating PDF or PNG.

PNGDLL

PNGDLL will need to be changed to look at the PDFName. If this exists, then check for the PDF. If it exists, then create the PNG from the defined pages and extract the pages into a new pdf when a pdf is requested.

Process

Customer External process will insert records into the tables extjobint, extjobstat, or extjobdet. Once the records are inserted the external process will call the stored procedures associated with the desired process. The external process must then check the inserted records for errors.

Relay Unify Statuses

STATUS	ORDER	CRITERIA/DESCRIPTION
New	0	When a data file is submitted into Relay Unify using the FTP/Email/Web directory, the submission ID is assigned, and the submission is placed in New status.
Received	100	uRecSub runs to get the MD5Sum for the data file and places the submission in Received status.
Hold for Confirmation	200	If a data file has the same MD5Sum as a previously submitted file, the submission will be placed in Hold for Confirmation status. From here the submission can be cancelled and deleted or marked for processing to continue processing the submission.
PreProcess	300	If a submission type is set up to use a preprocessing program, that submission will enter this status.
Campaign Reapproval	350	If a submission using a campaign has been required to have reapproval per submission or the status of the campaign is not in Final Approval status, the submission will remain in this status until all levels of approval for the campaign are complete.
Breakpack	400	The data file will be processed using the map file created in composition to create the documents.
External Update	500	This status can be used to call a custom program as part of Relay Unify uBridge.
Recalc Pages	600	If a submission goes through External Update status, it will go through this status to recalculate the pages of each document.
Awaiting Approval	700	If the submission is set up for web approval, it will remain in this status until someone approves or rejects the submission on the web.

ULURO STATUS

STATUS	FRIENDLY NAME	ORDER
-	New	0
R	Received	100
H	Hold for Confirmation	200
S	PreProcess	300
6	Campaign Reapproval	350
B	BreakPack	400
3	External Update	500
4	Recalc Pages	600
W	Awaiting Approval	700
L	Cleansing	900
2	Campaign Distribution	950
T	PostProcess	1000
N	PostProc Running	1100
Q	AutoJob	1200
G	Hold And Release	1300
J	JobSelect	1400
M	HouseHold	1500
P	Presort	1600
A	Ready to Print	1700
5	Print Manager	1750
O	Partial Print	1800
U	Print Complete	1900
I	Insertter	2000
F	Insertter Complete	2100
K	Sorter	2200
V	Mailed	2300
Y	Messages ONLY	2400
9	HTML ONLY	2500
C	Complete	2600
Z	Rejected	2650
0	Prot Error	2700
E	Error	2800
X	Submission Cancelled	2900
D	Deleted	3000
1	Archived	3100

Cleansing	900	During this status, the cleansing template selected on the submission type will be used to cleanse the data.
Campaign Distribution	950	If a submission using a campaign went through cleansing, it will process through this status to get the cleansed address fields and update the documents, and any conditionals based off address fields such as state.
PostProcess	1000	If a submission type is set up to use a postprocessing program, that submission will enter this status to determine the type of postprocessing needed.
PP Running	1100	If a submission is processing through Post Processing, it will remain in this status until complete.
Auto Job	1200	If a submission is set up to automatically create jobs, this status will be used to create the job.
Hold & Release	1300	If a submission is set up for Hold and Release, the submission will remain in this status until all documents are put on a job.
JobSelect	1400	If a submission is not set up to automatically create jobs, the submission will remain in this status until the job is manually created.
Merge	1500	Submissions that have been selected to be merged manually will go into this status until the merge job is complete.
Presort	1600	During this status, the presort template selected on the submission type will be used to presort the data.
Ready to Print	1700	Once a job has been created and processed through Presort, it will move into Ready to Print status. If the submission is not set up for Relay Unify Print Manager, it will remain in this status until printed using uPrint.exe.

Relay Unify Print Manager	1750	If a submission is set up for Relay Unify Print Manager, it will be in this status once the print jobs/files have been created. For submissions in this status, the print jobs will be visible in the PM Dashboard.
Partial Print	1800	If only some of the documents are printed, or not all the print jobs have been printed, the submission will be in Partial Print status.
Print Complete	1900	Once all documents and print jobs have been printed, the submission will go to Print Complete status.
Insertter	2000	Submissions must be placed in this status manually using Relay Unify Track when the submission is on the inserter unless the Insertter is connected to Relay Unify.
Insertter Complete	2100	Submissions must be placed in this status manually using Relay Unify Track when the submission has processed through the inserter. If the inserters are communicating with Relay Unify.
Sorter	2200	Submissions must be placed in this status manually using Relay Unify Track when the submission is on the sorter.
Mailed	2300	Submissions must be placed in this status manually using Relay Unify Track when the submission has been mailed.
Messages ONLY	2400	If using Relay Unify uDeliver and the setting to close after all messages are sent is enabled, the submission will remain in this status until all messages are sent.
Complete	2600	Jobs/submissions will enter this status if manually marked as complete.
Rejected	2650	If a submission was set up for web approval and it is rejected on the web, it will go into rejected status.
Prot Error	2700	If using Relay Unify uSecure and there is a protection error, the submission will go into Prot Error status.

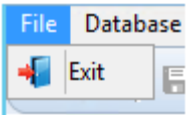
Error	2800	If there is an error when processing, through Breakpack for example, the submission will go into error status.
Cancelled	2900	Jobs/submissions will enter this status if manually marked as cancelled.
Deleted	3000	Jobs/submissions will enter this status if manually marked as deleted.
Archived	3100	This status is not currently in use.

Relay Unify Remap

URemap.exe is a program that allows the user to load a different map from the initial map at any time during the submission processing. Submissions in Cancelled, Deleted, Received, Closed or Preprocess status will not be included.

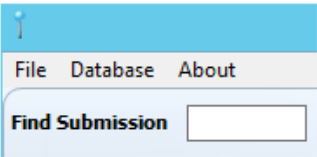
Exit the Program

File > Exit closes the program completely. It is the same as clicking the X in the top right corner to exit



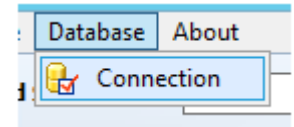
Version

To determine the version of uRemap.exe, click the About menu.



DB Connection

The first time you log in to uControl, or any other Relay Unify Module, you will be asked to set up your connection parameters. You can change this at any time by selecting Connection in the Database menu.



Server: This is the SQL server name

Database: This should always be Relay Unify.

User ID – This is typically trans, or whatever the SQL database connection login is, which is not stored anywhere.

Password – This is typically trans, or whatever the password for the SQL server login is, which is also not stored anywhere.

Integrated Security (Windows) – If this is checked, then the Windows domain user login for the SQL server will be used for UserID/PW. (this is not recommended).

DB Provider – If you are not using TLS select SQLOLEDB. If you are using TLS 1.2 select either SQLNCLI11 or MSOLEDBSQL.

Two side-by-side screenshots of a Windows-style dialog box titled 'Setup Connection Parameters'. The dialog box has a light blue background and standard window controls (minimize, maximize, close) in the top right corner. It contains several input fields and a dropdown menu. In the left screenshot, the 'Integrated Security' checkbox is unchecked. In the right screenshot, the 'Integrated Security' checkbox is checked. Both screenshots show the same values for the other fields: Server: 'cerebro\transqa2', Database: 'uluro', UserID: 'trans', Password: masked with dots, and DB Provider: 'SQLNCLI11'. At the bottom of each dialog are 'OK' and 'Cancel' buttons with green and red checkmarks respectively.

Main Form

When the program opens, the main form will be displayed. You will see a list of submissions that are eligible to have their maps changed.

Find Submission – Enter the specific submission ID to search for an individual submission.

Search On – Select the category to search on then enter the value of the category in the **Value** field.

Record Limit – Enter the total number of records that should be displayed on the dashboard.

Refresh – Click this button to manually refresh the results in the dashboard.

You can also change the order of the data in the columns by clicking on the column headers.

Submission ID	Customer	External Custo...	Submission	Received	Presort	Form	Status	File Na
2082	Uluro Training 2		UluroEnergy_UT2	6/1/2018 8:40:12	Trans LM	Standard 24 lb paper b	Hold And Release	201805
2081	Uluro Training	12345	Uluro_Energy	6/1/2018 8:40:06		Standard 24 lb paper b	Hold And Release	201805
2080	Uluro Training	12345	Uluro_Energy	6/1/2018 8:38:27		Standard 24 lb paper b	Print Manager	201805
2079	Uluro Training 2		UluroEnergy_UT2	6/1/2018 8:38:13	Trans LM	Standard 24 lb paper b	Print Manager	201805
2078	Uluro Training	12345	Uluro_Energy	6/1/2018 8:37:44		Standard 24 lb paper b	Print Manager	201805
2073	Uluro Training 2		UluroEnergy_UT2	6/1/2018 8:23:36	Trans LM	Standard 24 lb paper b	Print Manager	201805
2071	Uluro Training	12345	Uluro_Energy	6/1/2018 8:03:33		Standard 24 lb paper b	Print Manager	201805
2070	Uluro Training 2		UluroEnergy_UT2	6/1/2018 8:03:27	Trans LM	Standard 24 lb paper b	Print Manager	201805
2069	Uluro Training	12345	Uluro_Energy	6/1/2018 8:00:10		Standard 24 lb paper b	Print Manager	201805
2068	Uluro Training 2		UluroEnergy_UT2	6/1/2018 7:56:02	Trans LM	Standard 24 lb paper b	Print Manager	201805
2067	Uluro Training	12345	Uluro_Energy	6/1/2018 7:55:55		Standard 24 lb paper b	Print Manager	201805
2066	Uluro Training	12345	Uluro_Energy	5/31/2018 5:33:1		Standard 24 lb paper b	JobSelect	201804
2065	AF_Training	12345	Gas_Training_AF	5/31/2018 4:26:3		PrePrinted Logo Form	Print Manager	201805
2064	AF_Training	12345	Gas_Training_AF	5/31/2018 3:48:3		PrePrinted Logo Form	Print Manager	201805
2063	AF_Training	12345	Gas_Training_AF	5/31/2018 3:48:2		PrePrinted Logo Form	Awaiting Approval	201805
2062	AF_Training	12345	Gas_Training_AF	5/31/2018 3:43:2		PrePrinted Logo Form	Print Manager	201805
2061	AF_Training	12345	Gas_Training_AF	5/31/2018 2:54:4		PrePrinted Logo Form	Print Manager	201805
2060	Uluro Training	12345	UluroBank&Trust	5/31/2018 2:23:4	Trans LM	Standard 24 lb paper b	Awaiting Approval	201805
2058	ST_Training_3		S3_Energy	5/31/2018 11:35:		Standard 24 lb paper b	Print Manager	201805
2057	AF_Training	12345	Gas_Training_AF	5/31/2018 11:35:		PrePrinted Logo Form	Print Manager	201805
2056	ST_Training_3		S3_Energy	5/31/2018 11:10:		Standard 24 lb paper b	Print Manager	201805
2055	Uluro Training	12345	Uluro_Gas	5/31/2018 10:21:		Standard 24 lb paper b	Print Manager	201803
2054	Uluro Training	12345	Uluro_Gas	5/31/2018 10:02:		Standard 24 lb paper b	Print Manager	201803
2053	ST_Training_3		S3_Water	5/30/2018 5:59:4			Print Manager	201805
2051	Standard 4 Testing		R_2682	5/30/2018 5:22:1			Print Manager	201805
2050	Standard 4 Testing		R_2690	5/30/2018 5:09:0			Print Complete	201805
2049	Uluro Training	12345	Uluro_Gas	5/30/2018 5:07:3		Standard 24 lb paper b	Insertor	201803

Submissions Tab

The default map for the submission will show in the Load Map field for the submission selected on the dashboard.

To load a different map to the submission, select the submission. Type in the map directory and map name or click on the button next to the field to load a new map.

To save the loaded map to the submission, click the **Save To Submission** button. Verify you want to save this map to the submission then enter your name and reason for changing the map.

The screenshot shows the 'Uluro Remap - cerebro\transqa2.Uluro - trans' application window. The 'Submissions' tab is active, displaying a table of submissions. The table has columns: Submission ID, Customer, External Custo..., Submission, Received, Presort, Form, Status, and File Na. The table lists several submissions, including those for 'Uluro Training' and 'AF_Training'. At the top of the window, there are search and load map fields. The 'Load Map' field contains the path '\\TransQa2\submit\maps\Training\Uluro Gas.nmp'. Below the table, there are buttons for 'Save To Submission' and 'Save To New Map'.

Submission ID	Customer	External Custo...	Submission	Received	Presort	Form	Status	File Na
2078	Uluro Training	12345	Uluro_Energy	6/1/2018 8:37:44		Standard 24 lb paper b Print Manager		201805
2073	Uluro Training 2		UluroEnergy_UT2	6/1/2018 8:23:36	Trans LM	Standard 24 lb paper b Print Manager		201805
2071	Uluro Training	12345	Uluro_Energy	6/1/2018 8:03:33		Standard 24 lb paper b Print Manager		201805
2070	Uluro Training 2		UluroEnergy_UT2	6/1/2018 8:03:27	Trans LM	Standard 24 lb paper b Print Manager		201805
2069	Uluro Training	12345	Uluro_Energy	6/1/2018 8:00:10		Standard 24 lb paper b Print Manager		201805
2068	Uluro Training 2		UluroEnergy_UT2	6/1/2018 7:56:02	Trans LM	Standard 24 lb paper b Print Manager		201805
2067	Uluro Training	12345	Uluro_Energy	6/1/2018 7:55:55		Standard 24 lb paper b Print Manager		201805
2066	Uluro Training	12345	Uluro_Energy	5/31/2018 5:33:1		Standard 24 lb paper b JobSelect		201804
2065	AF_Training	12345	Gas_Training_AF	5/31/2018 4:26:3		PrePrinted Logo Form	Print Complete	201805
2064	AF_Training	12345	Gas_Training_AF	5/31/2018 3:48:3		PrePrinted Logo Form	Print Manager	201805
2063	AF_Training	12345	Gas_Training_AF	5/31/2018 3:48:2		PrePrinted Logo Form	Awaiting Approval	201805
2062	AF_Training	12345	Gas_Training_AF	5/31/2018 3:43:2		PrePrinted Logo Form	Print Manager	201805

The 'Update Submission' dialog box has two input fields: 'Your Name:' and 'Reason:'. Below these fields are two buttons: 'Save' (with a checkmark icon) and 'Cancel' (with a pencil icon).

Click Save. The change will be logged in the Map History tab.

The map that was just saved to the submission will be the map used for any document rendering for that submissionID. Any documents displayed on the web, print files, etc will used the map saved to the submission.

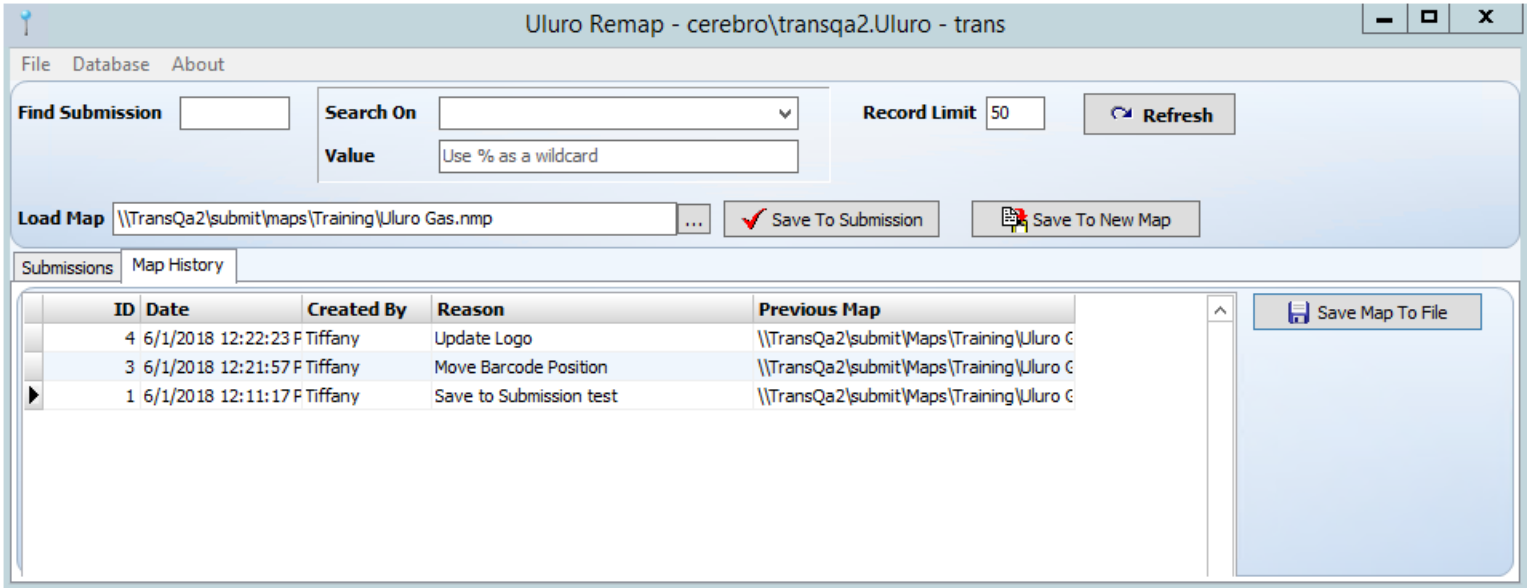
The Save To Submission function will not update the map name in the submission type. To have this new map used for future submissions created by the submission type, change the map name in the submission type as well.

To save the loaded map to a different map file name, click on the **Save To New Map** button. This allows you to save the current map on the submission as a new file. The file name must be unique. You can then edit the originally name map file and then Save it to the Submission.

Map History

The Map History tab shows a history of when the map has been changed for the submission selected on the Submissions tab.

You can save the map from the history to a new map file by clicking on the **Save Map To File** button. This allows you to save one of the maps on the submission as a new file. The file name must be unique.



Submission Expiration

Submission Type Expiration Settings

Setting expirations times for submissions can be done within each submission type under the General Information tab.

Check the **Expire Submission in** box to enable expirations and enter the number of **Days** before it should expire once each time a submission is created for this submission type. The expiration date will be set from the time the submission is created.

If this has been changed after submissions have run through and the expiration needs to take effect to historical submissions, click the **Reset Expirations** button. If you don't click this button and just save the changes made will only apply to submissions that run from that point forward. This will set the expirations for all unexpired submissions; Expired submissions will not be reset.



Tips:

Expired submissions will be cleaned up by uDelSub and once a submission is deleted or cancelled, the documents from it are no longer accessible on the web. Make sure when the expiration is set, it does not interfere with the archiving of documents online.

SUBMISSION EXPIRATION

 Specify whether the submission should expire and amount of days from file receipt that the submission will expire

☒ Submissions will expire (days specified below)

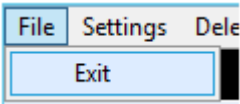
Once the days have been met for a submission, that submission will be flagged as expired in the database. These can then be cleaned up using uDelSub.exe.

uDEISub.exe

This runs as a scheduled task, but initially or to edit the parameters, open the program.

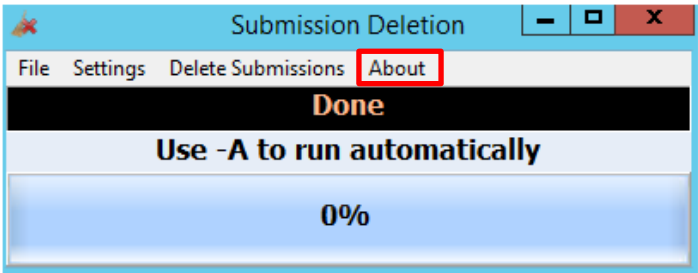
Exiting the Program

To exit the program, select Exit under the File menu. It is the same effect as clicking on the X in the top right corner of the program.



Version

To know the version of uDelSub.exe, click on the About menu.



Database Connection

You can change your Database connection information at any time by selecting Database in the Settings menu.

Server: This is the SQL server name

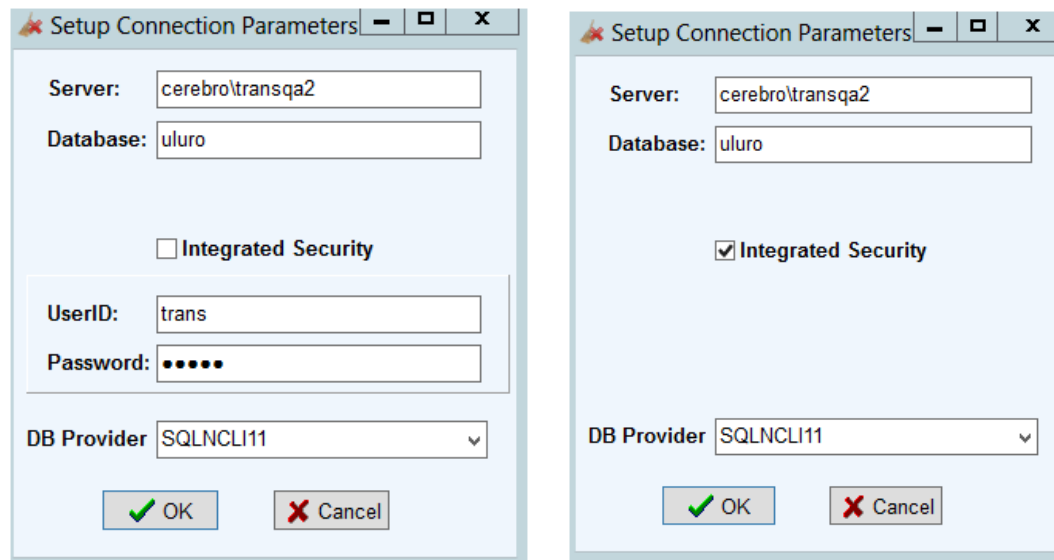
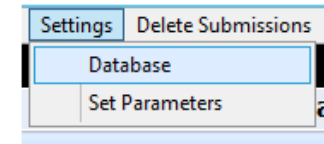
Database: This should always be Relay Unify.

User ID – This is typically trans, or whatever the SQL database connection login is, which is not stored anywhere.

User ID – This is typically trans, or whatever the password for the SQL server login is, which is also not stored anywhere.

Integrated Security (Windows) – If this is checked, then the Windows domain user login for the SQL server will be used for UserID/PW. (this is not recommended).

DB Provider – If you are not using TLS select SQLOLEDB. If you are using TLS 1.2 select either SQLNCLI11 or MSOLEDBSQL.



Parameters

To edit the parameters for uDelSub.exe, select Set Parameters under the Settings menu.

of Days Old to delete – This will delete any expired submissions that are X days old.

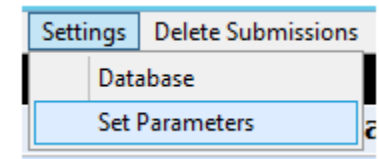
Delete Data Files – If this is checked, the data file associated with a submission will be deleted.

Delete PDFs – If this is checked, any pre-generated PDFs for a submission will be deleted.

Delete Reports – If this is checked, any (submission level only) reports associated with a submission will be deleted.

Do not delete if expiration is older than X days – If checked, this will prevent deletion of older submissions. Only expired submissions newer than the current date, minus the number of days will be deleted.

Enable Logging – If this is checked, logging will occur.

A screenshot of the 'Set Parameters' dialog box. It contains several settings: '# of days old to delete' is set to 10 with a note '(Max 500, increments of 10)'; 'Delete Data Files', 'Delete PDFs', and 'Delete Reports' are all checked; 'Do not Delete if expiration date is older than' is set to 0 days and is unchecked; and 'Enable Logging' is checked. There are 'Cancel' and 'Save' buttons on the right.

Tips:

You can delete submission types if nothing is associated with it. Run uDelSub.exe first to delete each of the submissions under the submission type. Then the submission type can be deleted in uSetup.

Deleting Submissions

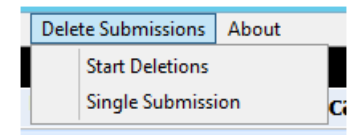
By default, the scheduled task is set to run every five minutes.

When uDelSub is run, only a trace in the records table in SQL will remain to verify jobs have run and to compare future MD5Sums against ones already processed through Relay Unify.

The record is also in uControl under Deleted status.

Start Deletions

Select Start Deletions under the Delete Submissions menu to manually run uDelSub.exe.



Single Submissions

Select Single Submission under the Delete Submissions menu to delete only one submission. You can delete a single submission regardless of it being expired or not.

CustID – Enter the CLID from uSetup for the customer.

SubTypeID – Enter the ID for the submission type.

SubmID – Enter the ID of the specific single submission.

A screenshot of a dialog box titled 'Single Submission'. It contains three input fields: 'Custid:', 'Subtypeid:', and 'Submid:'. To the right of these fields are two buttons: 'Cancel' (with a red X icon) and 'Process' (with a green checkmark icon).

Command Line

The program can be run automatically using the command line. Any command line parameters will override the saved parameters.

The command line parameters are –

-A (Puts the program in Automatic Mode)

-L (Turns on Logging)

-datafiles=true/false (Enables or disables deletion of Data Files)

-pdfs=true/false (Enables or disables deletion of PDFs)

-reports=true/false (Enables or disables deletion of Reports)

-days=99 (Sets the Number of days old to delete)

-donotdelete=true/false (Enables or disables Do not delete older than)

-dnddays=99 (Do not delete older than days)

-custid=99 (Single submission custid)

-subtypeid=99 (Single submission subtypeid)

-submid=99 (Single submission submid)

To run from the command line:

```
C:\Relay Unify\programs uDelSub.exe -A -L -datafiles=true -pdfs=true -reports=true -days=120 -donotdelete=true -dnddays=900
```

To delete a single submission using the command line:

```
C:\Relay Unify\programs\uDelSub.exe -A -L -custid=41 -subtypeid=73 -submid=140402 -datafiles=true -pdfs=true -reports=true
```

Not all parameters have to be on the command line.

You can also see a list of the command lines by running the application with the switch -? Or from the About screen.

Tickets for Tracking

There are three tickets available for tracking the various levels in Relay Unify: The Submission Ticket, the Consolidated Job Ticket, and the Print Job Ticket. They each have their corresponding ID in the barcode on the ticket along with information specific to the submission, job, or print job.

Submission Ticket

The submission ticket can be set up and customized within the submission type.

Under the Submission Ticket tab is where the customized entries for the ticket will be entered.

Submission Ticket SettingsInstructionsManage Items

JOB INSTRUCTIONS

Instructions
Submission ID - <#Submid>
Original File Name - <#OrgFilename>
Submission Type - <#subtypename>

JOB INSTRUCTIONS

<#Submid>
<#SubDescription>
<#Subtypename>
<#Filename>

PRINT INSTRUCTIONS

Instructions
*Print Reverse
*Test Print First 10 Pages

PRINT INSTRUCTIONS

Print Reverse
Print Face Down
Ensure Stock is Correct
Test Print First 10 Panes

INSERTER INSTRUCTIONS

Instructions
*Check for additional inserts

INSERTER INSTRUCTIONS

Check for additional inserts
Cynthia Inserter

SORTER INSTRUCTIONS

Instructions
*Sorter

SORTER INSTRUCTIONS

Sorter
Sorter instruction
Cynthia Sort

SaveManage Job Instructions

Job ID – This will be populated with the Submission Type name. You can edit this field, but it will not update the Basic Settings tab; it will only be displayed on the submission ticket.

Job Name – This will be populated with the Submission Description. You can edit this field, but it will not update the Basic Settings tab; it will only be displayed on the submission ticket.

CSR – Select the CSR representative that will be listed on the ticket.

Programmer – Select the Programmer that will be listed on the ticket.

Sales Rep – Select the Sales Representative that will be listed on the ticket.

To edit the dropdown options for the CSR, Programmer, and Sales Rep, click on the Manage Users button. This will bring up the edit forms for those fields.

Click the + Add User button and assign an ID for the person.

Enter a Name.

The Type selected will determine which dropdown that user will be listed under.

Check Active to make the user visible in the dropdown list.

Queue Config – Select from the dropdown one of the customized options previously created.

By default, there are no options. Click on the Manage Queues. This will bring up the edit form.

Click the + Add Queue button and assign an ID for the person.

Enter a Description to be displayed in the dropdown and once selected on the submission ticket.

of Prints – This is the number of submission tickets that will be printed if setup to print using JobTicketPrint.exe.

Priority – Select the priority for the submission type.

Create new priorities by clicking the pencil button or on the underlined field label. This will bring up the edit form.

Enter the ID. This will be used to track the priority within Relay Unify. It will also be the value that is displayed in the Priority column in PM.

Enter the Description. This will be displayed in the Priority column in uDashboard.

Enter the Hours that the job needs to be completed within. This will be used to calculate the Due Date for the submission.

The **Cutoff Time** also affects the Due Date. If a file comes in before the time entered here, today will count toward the hours. If the file comes in after the cutoff time, the time will not begin until the next workday.

For example, if the Priority is 3 days, and the file comes in on Friday at 11am, then the due date will be Sunday if all days are workdays (in the work calendar). The due date will be Tuesday if Saturday and Sunday are not marked as workdays.

If that same file comes in at 2:01 Friday, then the due date will be Monday (if all days are workdays) or Wednesday (if Saturday and Sunday are not workdays).

Cutoff Time – Enter the time to stop accepting files where today will count against the calculated SLA. The cutoff time and Due Date are for use with Relay Unify Track.

Mail Date – Select a date to appear in the Mail Date field on the ticket. This will only be used on the sample preview from uSetup. If the ticket is printed or generated from uControl, the Mail Date will be the date processed.

Click on the **Test Print** button to see a preview of the submission ticket as edits are made.

PRIORITY

PRIORITY LIST

ID	DESCRIPTION	HOURS	
0	Same Day	0	
1	12 Hours	12	
2	1 Day	24	
3	2 Days	48	
4	3 Days	72	
5	4 Days	96	

+ Add Priority

Save

Close

Instructions Tab

Predefined instructions can be set up for the Print/Laser, Inserter or Sort Instructions tabs.

To create instructions, click on the **Instructions Lists (Drag and Drop)** title or the pencil button next to it.

Enter the Instruction and the type. The type will determine which of the tabs will appear within to be added to that tab's instructions.

You can add them to the tab instructions by selecting an instruction and dragging it into the instruction area.

JOB INSTRUCTION MAINTENANCE

INSTRUCTIONS

INSTRUCTION	TYPE	
Check for additional inserts	I	
Cynthia Inserter	I	
Cynthia Print	P	
Cynthia Sort	S	
Ensure Stock is Correct	P	
Print Face Down	P	
Print Reverse	P	
Sorter	S	
Sorter instruction	S	
Test Print First 10 Pages	P	

Showing 1 to 10 of 11 entries

Previous12Next

+ Add Instruction

Close

PRINT INSTRUCTIONS

Instructions

*Print Reverse

*Test Print First 10 Pages

PRINT INSTRUCTIONS

Print Reverse

Print Face Down

Ensure Stock is Correct

Test Print First 10 Pages

You can also add variable tags to the Job Instructions tab.

Select a tag from the right window and click Add. This will add the tag to the left window.

The tag will be substituted with the actual value when the job ticket is created.

JOB INSTRUCTIONS

Instructions

Submission ID - <#Submid>

Original File Name - <#OrgFilename>

Submission Type - <#subtypename>

JOB INSTRUCTIONS

<#Submid>

<#SubDescription>

<#Subtypename>

<#Filename>

Items Tab

You can set up items by going to the items tab.

If you have already set up your forms, they will be loaded automatically. If not, you can add them manually.

Click the “Add Item” button.

In the Form Description area, type in a valid form or <F7> to do a search.

Enter any tray setup instructions.

Select Print or Insert.

Click “Save”

MANAGE ITEMS

FORM DESCRIPTION	TRAY SETUP	CONSUMABLE TYPE	
BRE (#9)		I	
Legal Paper		P	
Number 10 Window		I	
Standard 24 lb paper blank		P	
Standard 24 lb paper blank		P	

Showing 1 to 5 of 5 entries

Previous1Next

+ Add Item

View History

Printing the Submission Ticket

Auto Print the Submission Ticket – If this is checked, the submission ticket will be printed by JobTicketPrint.exe, which should be running to print the AutoPrint Reports. If it is not checked, it can still be printed from uControl manually.

GENERAL SETTINGS

SUBMISSION TICKET

☐ Auto Print the Submission Ticket

uControl: View Jobs

From the View Jobs tab in uControl, select a submission then click the **Consolidated Ticket** button. Select the printer.

Relay™ Unify

Powered by Transformations

SETTINGSVIEW SUBMISSIONSVIEW JOBSVIEW PRINT JOBSPRODUCTION SCHEDULE

James Smith

Control

Jobs Management

Manage Jobs & Submissions

Uluro North America | Transqa2_QC server

Change Context

FILTERS

← Hide

COMMON FILTERS

Status

<ALL OPEN>

Presort Type

<ALL>

Location

<ALL>

Job Id

Apply Filter

Reset Filter

Save Settings

Reset Settings

SETTINGS

Auto Refresh

Interval

10

Refresh

Records to Display

Total

50

Apply

Status Colors

Reports

Wgt/Dest Report

Consolidated Ticket

Id	Presort Type	Ext Job Name	Status	Created Date	Household By	# Docs	Max sheets	# Before Household	# Household
10164	None		Ready to Print	4/7/2025 12:18:39 P...	Unhousehold	64	1	64	0
10163	None		Print Manager	4/5/2025 9:35:40 PM	Unhousehold	6	2	6	0
10161	None		Print Manager	4/5/2025 8:50:20 PM	Unhousehold	32	1	32	0
10160	None		Print Manager	4/5/2025 8:43:40 PM	Unhousehold	6	2	6	0
10158	None		Print Manager	4/4/2025 1:41:40 PM	Unhousehold	6	2	6	0
10157	None		Print Manager	4/4/2025 1:41:20 PM	Unhousehold	32	1	32	0
10156	None		Print Manager	4/4/2025 10:35:20 AM	Unhousehold	32	1	32	0
10155	None		Print Manager	4/4/2025 10:34:40 AM	Unhousehold	6	2	6	0
10154	None		Print Complete	4/3/2025 11:22:00 AM	Unhousehold	6	1	6	0
10153	None		Print Manager	4/3/2025 9:40:20 AM	Unhousehold	32	1	32	0
10152	None		Print Manager	4/2/2025 4:30:20 PM	Unhousehold	6	2	6	0
10151	None		Print Manager	4/2/2025 2:30:00 PM	Unhousehold	32	1	32	0
10150	None		Print Manager	4/1/2025 4:29:00 PM	Unhousehold	32	1	32	0
10148	None		Ready to Print	4/1/2025 8:48:00 AM	Unhousehold	6	1	6	0
10147	None		Ready to Print	4/1/2025 8:46:00 AM	Unhousehold	6	1	6	0

First

Prev

1

2

3

4

Next

Last

keybowes.transqa2.trans.loc:4443/submissiontypes/jobtracking/jobs#

uControl: View Submissions

From the Submissions tab in uControl, select one or more submissions then click the **Submission Tickets** button.

Relay™ Unify
Powered by Transformations

SETTINGSVIEW SUBMISSIONSVIEW JOBSVIEW PRINT JOBSPRODUCTION SCHEDULE

James Smith

Control | Submission Management

Household, Combine, Resubmit and Beyond

Uluro North America | Transqa2_QC server

Change Context

FILTERS

Hide

COMMON FILTERS

Create a Job

Customer

All

Submission Type

All

Status

All

Location

All

Submission Id

Job Id

ADDITIONAL FILTERS

Use Receive Date

From Date

01/01/2025

To Date

01/01/2025

File Name

Original File Name

External Job #

SETTINGS

Auto Refresh

Interval

10

Refresh

Records to Display

Total

50

Apply

Status Colors

Submission Tickets

	Id	Job ID	Customer	SubTypeId	Received	Submission	Ext Cust Num	Regulatory	Status	# of Docs	BP %	Location
☐	15658		Pitney Bowes	34218	4/7/2025 11:18:43 AM	Pitney Bowes Gas			JobSelect	32	100	Conr
☐	15657		Pitney Bowes	34218	4/7/2025 11:18:12 AM	Pitney Bowes Gas			JobSelect	32	100	Conr
☒	15656	10164	Pitney Bowes	34218	4/7/2025 11:17:56 ...	Pitney Bowes Gas			Ready to Print	32	100	Conr
☒	15654		Pitney Bowes	34218	4/7/2025 11:16:42 ...	Pitney Bowes Gas			Submission Cancell...	32	100	Conr
☒	15655	10164	Pitney Bowes	34218	4/7/2025 11:16:42 ...	Pitney Bowes Gas			Ready to Print	32		Conr
☐	15652	10163	Pitney Bowes	34223	4/5/2025 9:35:38 PM	Relay Unify Electric			Print Manager	6	100	Conr
☐	15651	10162	Pitney Bowes	34223	4/5/2025 8:50:18 PM	Relay Unify Electric			Submission Cancelled	6	100	Conr
☐	15649		Pitney Bowes	34218	4/5/2025 8:50:01 PM	Pitney Bowes Gas			Submission Cancelled	32	100	Conr
☐	15650	10161	Pitney Bowes	34218	4/5/2025 8:50:01 PM	Pitney Bowes Gas			Print Manager	32		Conr
☐	15648	10160	Default Client	34233	4/5/2025 8:43:31 PM	Pitney Bowes Energy			Print Manager	6	100	Conr
☐	15647	10159	Default Client	34233	4/4/2025 2:08:49 PM	Pitney Bowes Energy			Submission Cancelled	6	100	Conr
☐	15646	10158	Default Client	34233	4/4/2025 1:41:32 PM	Pitney Bowes Energy			Print Manager	6	100	Conr
☐	15653		Default Client	34233	4/4/2025 1:41:32 PM	Pitney Bowes Energy			JobSelect	1		Conr
☐	15645	10157	Default Client	34232	4/4/2025 1:41:03 PM	Relay Unify Gas			Print Manager	32	100	Conr
☐	15644	10156	Default Client	34232	4/4/2025 10:35:12 AM	Relay Unify Gas			Print Manager	32	100	Conr

First

Prev

1

2

3

4

Next

Last

Pitney Bowes

Relay Unify Workflow Manual to Setup and Process Jobs User Guide

January 2025

Page 138 of 209

Example:

RP File Name: 20250307153837260PB_G Job ID: 10164 Doc Cnt: 32 Page Cnt: 32					
---	--	--	--	---	--

Received Date	Client Name	Sub ID	Mail Date
4/7/2025 11:17:55 AM	Pitney Bowes	15656	04/10/2025
Priority: 2 Days	Submitter ID:PB_Gas	Total Quantity:	
CSR: Tyler Mahurin	Programmer:Caleb	Sales Rep: Alex Gregory	
SPECIAL INSTRUCTIONS: Submission ID - 15656 Original File Name - Normal_1_of_1.pdf Submission Type - PB_Gas			

Form	Tray Set Up	Queue Config	Sign Offs
Standard 24 lb paper blank Standard 24 lb paper blank Legal Paper		Hold on HP Laserjet	OPR: Date: Time:
SPECIAL INSTRUCTIONS: *Print Reverse *Test Print First 10 Pages			

Item	Item	Sign Offs
		OPR: Date: Setup QC: Date: Sign Offs
SPECIAL INSTRUCTIONS: *Check for additional inserts		
Machine Meter #		Reprint Count
Starting Unused Postage	\$	
Ending Unused Postage	\$	
Meter Strip Amount	\$	Spoiled pc Count
Total Postage Amount	\$	
Total Batch Count		Spoiled Postage Total \$
SPECIAL INSTRUCTIONS: *Sorter		Presort Sign Offs OPR: Date:

Consolidated Job Ticket

The templates for the Consolidated Job Ticket must be set up in uSetup.

Templates

To set up the Consolidated Job Ticket templates, under the Global Settings, select the Ticket Templates tab > Consolidated Job Ticket.

To add a new template, click the + Add Ticket Template.

Enter a description. This will be listed as the name in the dropdown menu when selecting the template.

If this is going to be the default template, click on **Default Template**. Only one template can be the default.

If you want to print the images of the consumables, check the **Print Consumable Images** box. The images must be set up in uIMS if this is checked.

Global Settings

⚙️

JOB TRACKING - CONSOLIDATED JOB TICKET

CONSOLIDATED JOB TEMPLATES

▶ DEFAULT TICKET

MANAGE DOCUMENTS

Description

Default Consolidated Job Ticket

☒ Default Template

☐ Print Consumable Images

Special Instructions

special instructions go here

Insert Instructions

special instructions go here

Print Instructions

special instructions go here

Sort Instructions

special instructions go here

READY TO PRINT

☒ Autoprint

Printer

CutePDF Writer

Number of Copies

1

PRINT WITH PRINT JOBS

☒ Use Print Job Printer

☒ Autoprint

Printer

CutePDF Writer

Number of Copies

1

Save

◀ Back to Dashboard	
Monitor Services	
Processes & Directories	
Business Classifications	
Consumables	
Print Settings	▼
Postal Settings	▼
SLA Management	
Email Tracking (Mandrill)	
Locations	
Ticket Templates	▼
Consolidated Job Ticket	
Print Job Ticket	
Reports	▼
Web Settings	▼
uDeliver	▼
uCampaign Management	
uSecure	▼
Activation Codes	
Email Settings	

Ready to Print

Check the **Autoprint** box if you want to automatically print when a job containing a submission type with this template goes to Ready To Print status.

Select the **number of copies** to print.

Select the **printer** to print the Consolidated Job Ticket.

Print with Print Jobs

Check the **Autoprint** box if you want to automatically print when the first print job is created. Select the **printer** to print the Consolidated Job Ticket.

If you want to use the same printer that the print job is using, check the **Use Print Job Printer** box. If this is checked, the **Printer** in this section will not be used.

Select the **number of copies** to print.

If Use Print Job Printer is checked, and the print configuration used to create the print job has a file printer as the printer selected, then the CJT will print in the same directory as the print files for the print job. If the CJT is in the directory with the print files, it will have the name of the print file followed by RPT00000000JOBID.cjt.pdf.

If Use Print Job Printer is checked, and the print configuration used to create the print job has a physical printer, Relay Unify Native PDF, or Cute PDF as the printer selected, then the CJT will print in the RPT directory. If the CJT is in the RPT directory, it will have the name RPT00000000JOBID.cjt.pdf.

When enabling the CJT in the submission type, the template name must be selected. Do not use a blank template name.

Enter any instructions for Special, Print, Insert or Sort under the appropriate tabs in the Instructions window.

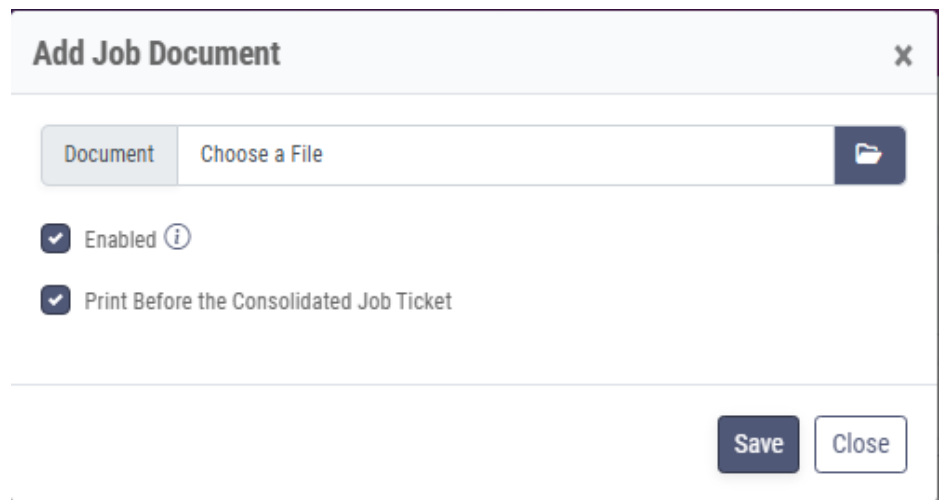
You can add additional documents that will be printed before or after the Consolidated Job Ticket by clicking on the **Documents** button.

To add a document:

Enter a file path and name or click on the ellipse to browse. The document that is to be printed must be accessible by the application that is to print it.

To Print Before the Consolidated Job Ticket, check the box. If it is unchecked, the document will print after.

Click Enable to enable it. If it is disabled, it will not print.



Add Job Document X

Document Choose a File 

☒ Enabled ⓘ

☒ Print Before the Consolidated Job Ticket

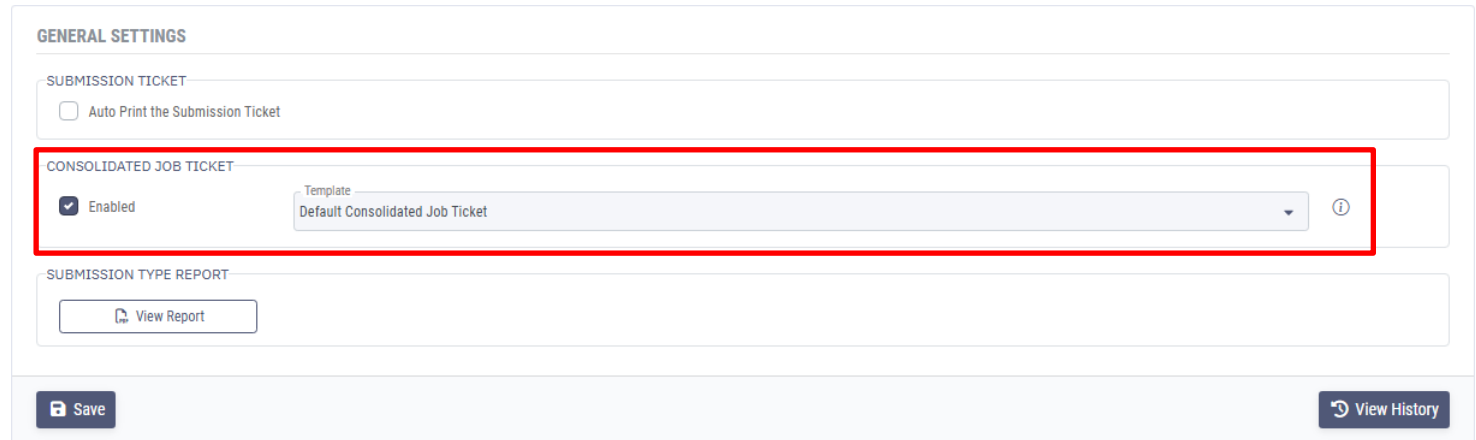
Save Close

Enabling the Consolidated Job Ticket

To allow a Consolidated Job Ticket to print for a submission type, you must enable it and select the template to use. Within the submission type, under the Additional tab, are the settings for the Consolidated Job Ticket.

Check the **Enable** box to enable the use of the Consolidated Job Ticket.

Select the template from the dropdown of all templates previously set up. If one is not selected, the template that is marked as the default template will be used.



GENERAL SETTINGS

SUBMISSION TICKET

☐ Auto Print the Submission Ticket

CONSOLIDATED JOB TICKET

☒ Enabled

Template
Default Consolidated Job Ticket

SUBMISSION TYPE REPORT

[View Report](#)

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



Tips:

If you try to **merge** submissions that have different Consolidated Job Templates, they will not merge. The consolidated job templates must be the same. If submissions are **combined** and they have different Consolidated Job Templates, only the template from the primary submission will be used. If the primary submission does not have the Consolidated Job Ticket enabled, then no Consolidated Job Ticket will be printed.

uConsJobPrint.exe needs to be running in the background (when the job is created) to generate the consolidated job ticket so that it is printed.

Manually Printing the Consolidated Job Ticket

The consolidated job tickets can automatically be printed when a job goes to Ready To Print status and/or when the first print job is created, either from uControl or Relay Unify Print Manager. It can be manually printed from uControl.

You can manually print the consolidated job ticket from the View Jobs tab in uControl. Click on the **Consolidated Ticket** button and save the file.

Relay™ Unify
Powered by Transformations

SETTINGSVIEW SUBMISSIONSVIEW JOBSVIEW PRINT JOBSPRODUCTION SCHEDULE

James Smith

Control | Jobs Management
Manage Jobs & Submissions

Uluro North America | Transqa2_QC serverChange Context

FILTERS

COMMON FILTERS

Status
<ALL OPEN>

Presort Type
<ALL>

Location
<ALL>

Job Id

Apply Filter

Reset Filter

Save Settings

Reset Settings

SETTINGS

Auto RefreshInterval 10Refresh

Records to DisplayTotal 50Apply

Status ColorsReports

Wgt/Dest Report

Consolidated Ticket

Id	Presort Type	Ext Job Name	Status	Created Date	Household By	# Docs	Max sheets	# Before Household	# Household	
10164	None		Ready to Print	4/7/2025 12:18:39 P...	Unhousehold	64	1	64	0	64
10163	None		Print Manager	4/5/2025 9:35:40 PM	Unhousehold	6	2	6	0	6
10161	None		Print Manager	4/5/2025 8:50:20 PM	Unhousehold	32	1	32	0	32
10160	None		Print Manager	4/5/2025 8:43:40 PM	Unhousehold	6	2	6	0	6
10158	None		Print Manager	4/4/2025 1:41:40 PM	Unhousehold	6	2	6	0	6
10157	None		Print Manager	4/4/2025 1:41:20 PM	Unhousehold	32	1	32	0	32
10156	None		Print Manager	4/4/2025 10:35:20 AM	Unhousehold	32	1	32	0	32
10155	None		Print Manager	4/4/2025 10:34:40 AM	Unhousehold	6	2	6	0	6
10154	None		Print Complete	4/3/2025 11:22:00 AM	Unhousehold	6	1	6	0	6
10153	None		Print Manager	4/3/2025 9:40:20 AM	Unhousehold	32	1	32	0	32
10152	None		Print Manager	4/2/2025 4:30:20 PM	Unhousehold	6	2	6	0	6
10151	None		Print Manager	4/2/2025 2:30:00 PM	Unhousehold	32	1	32	0	32
10150	None		Print Manager	4/1/2025 4:29:00 PM	Unhousehold	32	1	32	0	32
10148	None		Ready to Print	4/1/2025 8:48:00 AM	Unhousehold	6	1	6	0	6
10147	None		Ready to Print	4/1/2025 8:46:00 AM	Unhousehold	6	1	6	0	6

FirstPrev1234NextLast

Example:

Consolidated Job Ticket

4/8/2025 4:38:47 PM

Job Summary Information:

Job ID : 10164

Presort Type:

Mail Class :

Mail Type :

Status : Ready to Print

SLA : 2 Days

Combined Files 2

Postage : \$0.00

Documents: 64

Pages : 64

Packages :

Trays :

Job Date : 4/7/2025 12:18:39 PM

Due Date : 4/10/2025 6:00:00 AM

Process Date : 4/7/2025 11:16:49 AM

Last Printed :



Job Volume Summary:

Metric	Count Description	Counts
Documents	Total Original Documents or Records	64
Sheets	Total Physical Forms Used	64
Images	Total Printed Impressions	64
Packages	Total Mailed or Total Envelopes	64

Special Handling Instructions

Special Instructions

special instructions go here

Print Instructions

special instructions go here

Insert Instructions

special instructions go here

Sort Instructions

special instructions go here

Consolidated Job Ticket

4/8/2025 4:38:47 PM

Job Consumable Summary:							
Paper							
Routing	Item/SKU Number	Description	Perf	Color	Size	Count	Spoilage
	N/A	Standard 24 lb paper blank				64	
Envelope							
Tray #/MT	Item/SKU Number	Description	Window	Color	Size	Count	Spoilage
	N/A	BRE (#9)				64	
	N/A	Number 10 Window				64	

Consolidated Job Ticket

4/8/2025 4:38:47 PM

Job Volume Breakdown:					
	DATA	PRINT		INSERT	
Document Classification	Pages Submitted	Images Printed	Sheets Printed	Document Count	Package Count
Qualified	0	0	0	0	0
Unqualified	64	64	64	64	64
No Mail	0	0	0	0	0
Total Printed	64	64	64	64	64
Omitted	0	0	0	0	0
E-Docs	0	0	0	0	0
E-Docs Others	0	0	0	0	0
Total Not Printed	0	0	0	0	0
Total Submitted:	64	64	64	64	64

Consolidated Job Ticket

4/8/2025 4:38:47 PM

Postage Summary:			
Weight and Category Breakdown			
Rate Class	Qualified	Unqualified	Total
1 mg	0	64	64
2 mg	0	0	0
3 mg	0	0	0
Over 3 mg	0	0	0
Total Documents	0	64	64
Address Management Breakdown			
Correction Type	Document Count		
Original Addresses	64		
CASS Errors	0		
DPV Errors	0		
CASS Corrections	0		
NCOA Moves	0		
Total Documents	64		

Consolidated Job Ticket

4/8/2025 4:38:47 PM

Page Group Breakdown:

<u>Page Group</u>	<u>Qualified</u>	<u>Unqualified</u>	<u>No Mail</u>	<u>Omitted</u>	<u>E-docs</u>	<u>E-docs Others</u>	<u>Total Packages</u>	<u>Total Pages</u>
1 Page Documents	0	64	0	0	0	0	64	64
Total Printed	0	64	0	0	0	0	64	64

Consolidated Job Ticket

4/8/2025 4:38:47 PM

Package Volume by Submission Breakdown:

<u>Sub ID</u>	<u>Sub Type</u>	<u>Client Name</u>	<u>ID</u>	<u>File Name</u>	<u>Qualified</u>	<u>Unqualified</u>	<u>No Mail</u>	<u>Omitted</u>	<u>eDocs</u>	<u>eDocs Other</u>	<u>Total</u>
15655	PB_Gas	Pitney Bowes	511	Normal_1_of_1.pdf	0	32	0	0	0	0	32
15656	PB_Gas	Pitney Bowes	511	Normal_1_of_1.pdf	0	32	0	0	0	0	32
Total Printed					0	64	0	0	0	0	64

Consolidated Job Ticket

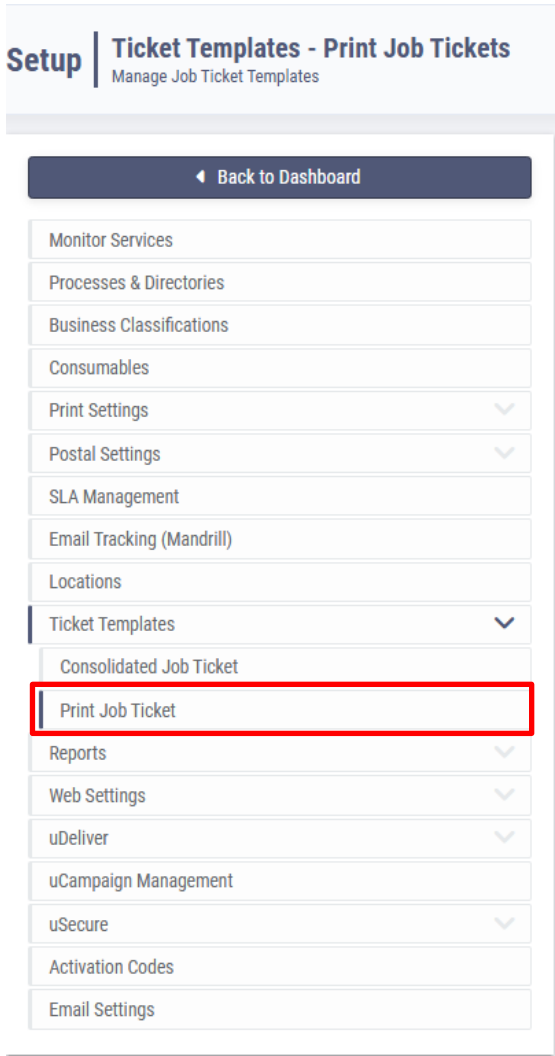
4/8/2025 4:38:47 PM

Image Volume by Submission Breakdown:

<u>Sub ID</u>	<u>Sub Type</u>	<u>Client Name</u>	<u>ID</u>	<u>File Name</u>	<u>Images Printed</u>				<u>eDocs</u>	<u>eDocs Other</u>	<u>Total</u>
					<u>Qualified</u>	<u>Unqualified</u>	<u>No Mail</u>	<u>Omitted</u>			
15655	PB_Gas	Pitney Bowes	511	Normal_1_of_1.pdf	0	32	0	0	0	0	32
15656	PB_Gas	Pitney Bowes	511	Normal_1_of_1.pdf	0	32	0	0	0	0	32
Total Printed					0	64	0	0	0	0	64

Print Job Ticket

The templates for the Print Job Ticket can be set up in uSetup. This will reflect all templates setup.



Print Job Ticket Templates

Enter a description. This will be listed as the name in the dropdown menu when selecting the template.

If this is going to be the default template, click on **Default Template**. Only one template can be the default.

If you want to print the images of the consumables, check the **Print Consumable Images** box. The images must be set up in uIMS if this is checked.

Check the **Autoprint** box if you want to automatically print.

Select the **printer** to print the Print Job Ticket.

If you want to use the same printer that the print job is using, check the **Use Print Job Printer** box.

Select the **number of copies** to print.

If Autoprint and Use Print Job Printer and both checked, the PJT can be printed at the beginning of the first print file.

In uSetup, in the Processes set PJTinFile to Y to enable the setting.

This will create the PJT in the first print file. This setting is only to be used with Relay Unify Print Manager.

The PJT will always be output duplexed and Landscape.

The PJT will be followed by any Banner Pages, PDF Before, and Separator Pages. The PJT will be the first sheet of the print job.



Tips:

RPPrintApp is what prints the Print Job Ticket. It prints the PJT once the print job is physically printed.

The screenshot shows the 'JOB TRACKING - PRINT JOB TICKET' interface. At the top right is a 'Global Settings' button. The main heading is 'PRINT JOB TEMPLATES > DEFAULT TICKET' with a 'MANAGE DOCUMENTS' link on the right. The form contains several sections: a 'Description' field with 'Default Print Job Ticket' and a checked 'Default Template' checkbox; a 'Print Consumable Images' checkbox (unchecked); 'Special Instructions' (Don't seal the envelopes) and 'Print Instructions' (Print right away!) text areas; 'Insert Instructions' (insert instructions) and 'Sort Instructions' (sort this please) text areas; a 'READY TO PRINT' section with a checked 'Autoprint' checkbox and a 'Number of Copies' dropdown set to '1'; a 'Printer' dropdown set to 'CutePDF Writer'; and a checked 'Use Print Job Printer' checkbox. A 'Save' button is at the bottom left.

When enabling the PJT in the print configuration, the template name must be selected. Do not use a blank template name.

Enter any instructions for Special, Print, Insert or Sort.

You can add additional documents that will be printed before or after the Print Job Ticket by clicking on the **+ Add Job Document** button.

To add a document:

Enter a file path and name or click on the ellipse to browse. The document that is to be printed must be accessible by the application that is to print it.

To Print before the Print Job Ticket, check the box. If it is unchecked, the document will print after.

Click “Enable” to enable it. If it is disabled, it will not print.

Add Job Document

Document

Choose a File

☒ Enabled

☒ Print Before the Print Job Ticket

Save

Close

Enable in Printer Jobs

To print a Print Job Ticket, you must enable Print Job Ticket and select a template. If you enable it but do not select a template, the default template will be used.

PRINT SETTINGS - PRINT CONFIGURATION Global Settings

PRINT CONFIGURATION ▶ EDIT PRINT CONFIGURATION

☒ Enable Print Configuration

Description

All Docs PDF Output

Display Description

All Docs PDF Output

Printer

Microsoft Print to PDF

File Location

\\Transqa2\SUBMIT\PRT\<#SubDescription>_s<#Submid>_p_<#prtjobid>_AllDocsPDF

Custom Filter

Number of Pages (sheets): From: 1 To: 999999

Docs Per File

9999999

PRINT ONLY

☒ No Exclusion☐ Excluded☐ NoMail Exclusion☐ All Excluded☐ Omit Exclusion

QUALIFIED

☒ All☐ Qualified Only☐ Unqualified Only

ESTATEMENT

☒ No eStatements☐ Include eStatements☐ eStatements Only

INSERTER BARCODE

☐ Inserter Barcode

Job ID Size

0

Statement ID Size

0

PRINT JOB SPLITS

☐ Split Print Jobs

Number of Print Jobs

0

☐ Split into Docs Per File Print Jobs

POCKET MATCH

☐ Enable Pocket Match 1

Item #

☐ Enable Pocket Match 2

Item #

PRINT JOB TICKET

☒ Enable Print Job Ticket

Template

Default Print Job Ticket

Enable in Print Configurations

You can also automatically print the Print Job Ticket by adding it to the print configuration. This will allow it to be printed from the Relay Unify Print Manager.

JOBS ▶ CREATE PRINTER JOB 10164

PRINTER INFORMATION

Printer
CutePDF Writer

Printer Location
Nashville

☐ Print Audit Report w/ Print Job

File Location
Normal_1_of_1.pdf

Number of Pages (sheets)
From 1 To 1

Custom Filter
Value

☐ Send to the print manager

Configuration
All Docs PDF Output | 18

PRINT ONLY

☒ No Exclusion
☐ NoMail Exclusion
☐ Omit Exclusion

☐ Excluded
☐ All Excluded

QUALIFIED

☒ All
☐ Qualified Only
☐ Unqualified Only

ESTATEMENTS

☒ No eStatements
☐ Include eStatements
☐ eStatements Only

PRINT JOB TICKET

☒ Enable Print Job Ticket

Template
Default Print Job Ticket

SUBMISSIONS

Rows Selected: 2

Job Location
Household Job

FILTER BY

☒ Doc #
☐ 1 st & last

☐ Doc in sort order
☐ Account ID

☐ Price no
☐ Tray

FILTER SETTING

From 1 To 64

☐ Unprinted only

Manually printing the Print Job Ticket

If you want to manually print the Print Job Ticket, go to the View Print Jobs tab in uControl, and click Print Job Ticket.

Relay™ Unify

Powered by Transformations

SETTINGSVIEW SUBMISSIONSVIEW JOBSVIEW PRINT JOBSPRODUCTION SCHEDULE

James Smith

Control

Print Jobs Management

Search Print Jobs & View Details

Uluro North America | Transqa2_QC server

Change Context

FILTERS

← Hide

COMMON FILTERS

Print Job Status

All

Location

All

Print Job Id

Apply Filter

Reset Filter

Save Settings

Reset Settings

SETTINGS

Auto Refresh

Interval

5

Refresh

Records to Display

Total

100

Apply

Reports

Run Print Job Report

Print Job Ticket

Print Job ID	Job ID	Printer Name	Status	Create Date	Order	Auto Sample	Complete Date
8172	10163	Uluro Native PDF Outp...	Print Manag...	4/5/2025 9:36:00 PM	Docno		4/5/2025 9:36:06 PM
8171	10163	Uluro Native PDF Output	Print Manager	4/5/2025 9:36:00 PM	Cast(Pieceno as integer)		4/5/2025 9:36:03 PM
8170	10162	Uluro Native PDF Output	Cancelled	4/5/2025 8:50:41 PM	Docno		4/5/2025 8:50:52 PM
8169	10162	Uluro Native PDF Output	Cancelled	4/5/2025 8:50:41 PM	Cast(Pieceno as integer)		4/5/2025 8:50:49 PM
8168	10161	Uluro Native PDF Output	Print Manager	4/5/2025 8:50:41 PM	Cast(Pieceno as integer)		4/5/2025 8:50:45 PM
8167	10160	Uluro Native PDF Output	Print Manager	4/5/2025 8:44:00 PM	Docno		4/5/2025 8:44:08 PM
8166	10160	Uluro Native PDF Output	Print Manager	4/5/2025 8:44:00 PM	Cast(Pieceno as integer)		4/5/2025 8:44:05 PM
8165	10159	Uluro Native PDF Output	Cancelled	4/4/2025 3:25:20 PM	Docno		4/4/2025 3:25:27 PM
8164	10159	Uluro Native PDF Output	Cancelled	4/4/2025 3:25:20 PM	Cast(Pieceno as integer)		4/4/2025 3:25:23 PM
8163	10158	Uluro Native PDF Output	Print Manager	4/4/2025 1:42:00 PM	Docno		4/4/2025 1:42:06 PM
8162	10158	Uluro Native PDF Output	Print Manager	4/4/2025 1:42:00 PM	Cast(Pieceno as integer)		4/4/2025 1:42:03 PM
8161	10157	Uluro Native PDF Output	Print Manager	4/4/2025 1:41:40 PM	Cast(Pieceno as integer)		4/4/2025 1:41:43 PM
8160	10156	Uluro Native PDF Output	Print Manager	4/4/2025 10:35:40 AM	Cast(Pieceno as integer)		4/4/2025 10:35:43 AM
8159	10155	Uluro Native PDF Output	Print Manager	4/4/2025 10:35:01 AM	Docno		4/4/2025 10:35:07 AM
8158	10155	Uluro Native PDF Output	Print Manager	4/4/2025 10:35:00 AM	Cast(Pieceno as integer)		4/4/2025 10:35:04 AM

First

Prev

1

2

3

4

5

Next

Last

Example:

Print Job Ticket - Split 1 of 1

4/8/2025 9:08:48 PM

Print Job Summary Information:

Print Job ID : 8172	Status : Print Manager	Job ID : 10163	Job Date : 4/5/2025 9:35:40 PM
Presort Type :	SLA : 2 Days	Job Name :	Due Date : 4/9/2025 6:00:00 AM
Mail Class :	Combined Files 1		Process Date : 4/5/2025 9:35:37 PM
Mail Type :	Postage : 0		Last Printed : 4/5/2025 9:36:00 PM
	Postal Trays :		Received Date : 4/5/2025 9:35:37 PM
	Printer : Uluro Native PDF Output		Approved Date :

Print Job Volume Summary:

Metric	Count Description	Counts	First and Last Records	
Documents	Total Original Documents or Records	6	Sequence #	Name
Sheets	Total Physical Forms Used	8	1	Matthew Aaron
Images	Total Printed Impressions	8	6	Clarence Acuna
Packages	Total Mailed or Total Envelopes	6		

Special Handling Instructions

Special Instructions

Don't seal the envelopes

Print Instructions

Print right away!

Insert Instructions

insert instructions

Sort Instructions

sort this please

Print Job Consumable Summary:

Paper									
Insert #	Item/SKU Number	Description	Prim	Backer	Color	Size	Count	Spoilage	
	N/A	Standard 24 lb paper blank	Y				6		
	N/A	Standard 24 lb paper blank					2		

Envelope									
Insert #	Item/SKU Number	Description	Prim	Window	Color	Size	Count	Spoilage	
	N/A	BRE (#9)					6		

Print Job Ticket - Split 1 of 1

4/8/2025 9:08:48 PM

<u>Insert #</u>	<u>Item/SKU Number</u>	<u>Description</u>	<u>Prim</u>	<u>Pocket</u>	<u>Window</u>	<u>Color</u>	<u>Size</u>	<u>Count</u>
	N/A	Standard 24 lb paper blank	Y					6

Sign Offs
Operator:
Date:
Time:
Notes:

Reports

Autoprint Reports

This is for setting which reports get physically printed and in what order. Regardless of whether they get printed, all reports that are generated will appear in the Submit\RPT directory.

Select a report.

Report Name – This cannot be edited.

Auto Print – Check this if the report should be printed using JobTicketPrint.exe.

Print Order – Select a number according to the order you want these reports printed.

of Copies – This is the number of copies that will be printed.

Print Job Reports Last – If this is checked, the job level reports will be sent to the printer after the submission level reports.

Click Save.

REPORTS - AUTOPRINT REPORTS

Global Settings

SettingsReports

REPORTS

ID	REPORT NAME	TYPE	AUTO PRINT	PRINT ORDER ID	# COPIES
4841	CRM PSL	Job	☐	0	1
4842	CRM TPR	Job	☐	0	1
4996	CRM Move Update CSV Report	Sub	☐	0	1

Showing 71 to 73 of 73 entries

Previous1...45678Next



Tips:

If multiple submissions make up a job, then a submission level report will print for each individual submission that is part of the job. For example, several Change Address CSV reports may generate but only one Satori Postage Summary report.

Report	Naming Structure	Submission/Job Level Report	Email Event	Criteria to Generate the Report
Account Data CSV	RPT00000000JOBID.ACCT.CSV	Job	Presort Job Reports	Presort
Bad Address CSV	RPT00000000SUBMID.bad.csv	Submission	N/A	Cleansing
Bad Address Report	RPT00000000SUBMID.BAD.PDF	Submission	Cleansing Reports	Cleansing
Change Address CSV	RPT00000000SUBMID.CAR.CSV	Submission	N/A	Cleansing
DocPullReport	RPT00000000SUBMID.PDPull.txt	Submission	N/A	Documents are pulled during custom status web proofing
Itemized Submission Report	RPT00000000SUBMID.ISR.PDF	Submission	Presort Submission Reports	
Job Presort Document CSV	RPT00000000JOBID.jpdcsv	Job	Presort Job Reports	
Job Summary Submission Report	RPT00000000JOBID.jss.PDF	Job	Presort Job Reports	Job Status is Complete, Print Complete, Inserter, Inserter Complete, Mailed, or Sorter status.
Mandrill HTML Emails Errors	RPT00000000SUBMID_N.mee.pdf N is the # of hours after the emails submitted report has processed	Submission	Report Group	Created when the set number of hours pass after the Mandrill HTML Emails Submitted report is generated.
Mandrill HTML Emails Submitted	RPT00000000SUBMID.mes.pdf	Submission	N/A	created when the HTLM emails are sent to Mandrill.
Manifest Report	RPT00000000JOBID.JMAN.PDF	Job	Presort Job Reports	

NCOA Move Report	RPT00000000SUBMID.mov.pdf	Submission	Cleansing Reports	
Presort Document CSV	RPT00000000SUBMID.PD.CSV	Submission	N/A	
Print Summary Report	RPT00000000JOBID.PSUM.XLS	Job	N/A	Job Status is Complete
Return Address Summary	RPT00000000SUBMID.rtnrpt.pdf	Submission	N/A	
Submission Billing Report	RPT00000000SUBMID.csb.csv	Submission	N/A	When the status is Print Complete
Submission Breakdown Report	RPT00000000SUBMID.BIG.PDF	Submission	Presort Submission Reports	
Submission Detail Report	RPT00000000SUBMID.DTL.PDF	Submission	Breakpack Reports	
Submission Email Report	RPT00000000SUBMID.seml.pdf	Submission	N/A	Combine Send End User Emails sent for a submission



Tips:

RPRReport.exe generates the reports that are not autogenerated.

Account Data CSV

This report is used for importing account data into an external system.

Fields:

SubmissionID	ReturnEnvelope	Notes	Between1and2oz
AccountNumber	InputFilename	Type	Between2and3oz
CustomerID	MapName	Location	Greater3oz
SubmitterID	Edit	Presort	TotalForwardAddr
CustomerName	WebDisplay	PresortType	TotaleStatements
SubmitterName	AllowPay	PresortDate	TotalInceStatements
JobDate	ItemNumber	PresortTime	ExcludedDocs
JobTime	Form2	RegularDocs	TotalDocs
PONumber	Form3	UnqualifiedDocs	EmailDocs
FormName	Form4	NonmailingDocs	FAXDocs
MailingEnvelope	Form5	TotalAdditionalPages	

```
"SubmissionID","AccountNumber","CustomerID","SubmitterID","CustomerName","SubmitterName","JobDate","JobTime","PONumber","FormName","MailingEnvelope","ReturnEnvelope","InputFilena
"1922","","9","medman","Transformation Test","Medical Management 1","09/07/2011","10:23:17","","PrePrinted Blue #1","Number 10 Window","Number 10 Window","largermedman","demomedi
"1923","","9","medman","Transformation Test","Medical Management 1","09/07/2011","10:23:17","","PrePrinted Blue #1","Number 10 Window","Number 10 Window","largermedman","demomedi
```

Bad Address CSV/Bad Address Report

These reports are generated if a submission is set up to do cleansing. It shows any accounts that were not cleansed because there was incorrect information in the address. The cleansing error code is shown below the account information.

Non-Standard Address Report

4/23/2025 9:27:06 AM

Job ID:

Original Submission File: 20240620115723009SAT Postal

Submission ID: 5143

Client: Transformations Testing

Submitter: SAT Postal

Name: Satori Postal Test

NOTE: The following addresses need to be corrected on your computer system.
They have been mailed and delivery will be attempted but may be unsuccessful.

Acct ID#: 40000138

ORANGE LANTERN BAR AND GRILL
200 WEST SIDE HWY
NEW YORK, NY 10001
496 --

Acct ID#: AL068

KARI G MASON
19820 BAYVIEW WAY
WEST LINN OR 97068

412 -- Street name invalid

Acct ID#: FM252

ALAN RICKETTS
426 S SPRINGFIELD RD
CLIFTON HEIGHTS PA 19018

493 -- Valid primary but failed DPV because of missing secondary

```
"AccName","AccAddr1","AccAddr2","AccAddr3","AccAddr4","AccCity","AccState","AccZip","CleanseCode"CRLE
"", "Mr John Smith", "111 School lane", "Bradley, Greenwood 29819", "", "", "", "", "Street name invalid"CRLE
"", "Mrs Maria Grainger", "208 Old hall street", "Pleasant grove, Utah 84042", "", "", "", "", "Street name invalid"CRLE
"", "Mr Tim Adams", "16 Lucania street", "Berne, Adams 46711", "", "", "", "", "Street name invalid"CRLE
"", "Mr Dave Campo", "145 Durning road", "Appleton, Swift 56208", "", "", "", "", "Street name invalid"CRLE
"", "Mr Harry Madison", "73 Pier head", "Bandon, Coos 97411", "", "", "", "", "Street name invalid"CRLE
"", "Mr Niel Tyson", "4482 N 42nd Ave", "New York City, New York 10453", "", "", "", "", "Similar street names were found but with no exact matches"CRLE
"", "Ms Marie Curie", "55 Harris Road", "Austin, Texas 78610", "", "", "", "", "Similar street names were found but with no exact matches"CRLE
"", "Mr Louis Pasteur", "884 Beale St", "Memphis, Tennessee 38002", "", "", "", "", "Failed DPV because of invalid primary"CRLE
```

Change Address CSV

This report is used for importing account data into an external system. The data reflects any accounts where cleansing detected a change in address. Both the original address and the new address are shown.

Fields:

SubmissionID	Orig_Addr2	Proc_Addr1	CleanseCode
SubmissionDate	Orig_Addr3	Proc_Addr2	ChangeDesc
SubmissionDesc	Orig_Addr4	Proc_Addr3	NCOAMatchFlag
DocumentNumber	Orig_City	Proc_Addr4	NCOAMoveNote
Account	Orig_State	Proc_City	NCOAMoveType
Orig_Name	Orig_Zip	Proc_State	NCOAMoveEffective
Orig_Addr1	Proc_Name	Proc_Zip	

```
"SubmissionID","SubmissionDate","SubmissionDesc","DocumentNumber","Account","Orig_Name","Orig_Addr1","Orig_Addr2","Orig_Addr3","Orig_Addr4","Orig_City","Orig_State","Orig_Zip","Proc_Name",
"1749","09/18/2017","BankandTrust","1","1010123456789","Tiffany Tobin","c/o Bill Faucet","201 Seaboard Ln","Franklin, TN 37067","","","TIFFANY TOBIN","C/O BILL FAUCET","201 SEABOARD
"1749","09/18/2017","BankandTrust","2","10105900000000","Dave Reyes","","202 Seaboard Ln","Franklin, OH 37067","","","E491","","","CR13
"1749","09/18/2017","BankandTrust","3","10105900000000","Bob Brown","","203 Seaboard Ln","Franklin, PA 37067","","","E491","","","CR13
"1749","09/18/2017","BankandTrust","4","10109300000000","Gary Knoll","","205 Seaboard Ln","Franklin, TX 37067","","","E491","","","CR13
"1749","09/18/2017","BankandTrust","5","10104800000000","Sam Bond","c/o Harry Walker","206 Seaboard Ln","Franklin, TN 37067","","","E491","","","CR13
"1749","09/18/2017","BankandTrust","6","10106000000000","Betty Wite","","207 Seaboard Ln","Franklin, TN 37067","","","E491","","","CR13
"1749","09/18/2017","BankandTrust","7","10106900000000","Jill Davis","","208 Seaboard Ln","Franklin, PA 37067","","","JILL DAVIS","208 SEABOARD LN","","","FRANKLIN","TN","37067-82
"1749","09/18/2017","BankandTrust","8","10105500000000","Patty Davis","c/o Fred Wick","209 Seaboard Ln","Franklin, NY 37067","","","PATTY DAVIS","C/O FRED WICK","209 SEABOARD LN","","
"1749","09/18/2017","BankandTrust","9","10104900000000","Ben Faucet","","210 Seaboard Ln","Franklin, NC 37067","","","E491","","","CR13
```

Itemized Submission Report

This is a submission report that shows a summary breakdown of the types of documents. It is calculated after presorting has run. It shows the number of documents, pages, images and sheets (actual count of paper used).

Regular documents are printable documents that presorted.

Unqualified documents are printable documents that did not presort.

Non-mailing documents are documents that are marked “no mail”.

Omitted documents are documents marked “Omit” or “Exclude”.

eStatements are documents marked as eStatements.

Documents requiring extra postage are calculated for regular documents only.

4/23/2025 9:35:44 AM

Itemized Submission Report

Original Submission File:20240620115723009SAT Postal

Submission ID: 5143

Job ID: 461195

Client: Transformations Testing

Submitter ID: SAT Postal

Name: Satori Postal Test

Contact Person:Robert Meyer

Phone: 6158237489

Fax:

	Pages Subm	Images Printed	Sheets	Addn Images	Addn Sheets
Regular Documents:	565	565	565	0	0
Unqualified Documents:	1	1	1	0	0
Non-mailing Documents:	0	0	0	0	0
Total Printed Documents:	566				
Omitted Documents:	0	0	0	0	0
Total Submitted Documents:	566	566	566	0	0
Number of NCOA Updates:	0				

Number of Documents requiring extra postage

	Qualified	Others	Total
Between 1 and 2 ounces:	0	0	0
Between 2 and 3 ounces:	0	0	0
Greater than 3 ounces:	0	0	0

REPORT EXPLANATION:

Regular Documents - documents whose address has been cleansed and presorted (excludes eStatements).

Unqualified Documents - documents which do not qualify for postal discounts (excludes eStatements).

Non-Mailing Documents - documents which are marked print but do not mail (excludes eStatements).

Omitted Documents - documents that are marked to not be printed (excludes eStatements).

Total Submitted Documents - Number of documents submitted.

Pages Subm - Number of pages in the input data.

Images Printed - Number of laser printed images on one side.

Sheets - Number of pages (Sheets of paper) actually printed.

Addn Images - Number of Images Printed - Number of Documents.

Addn Sheets - Number of pages printed - Number of Documents.

Please be sure to review the bad address report and make the appropriate address corrections in your database to avoid postage costs on undeliverable documents.

Be sure you have a consistent procedure to use every time you create a file for transmission in order to assure proper printing of your documents.

Please notify us of any changes to your system that could affect the format of your submitted documents. Any unexpected changes may delay your mailing!

Job Presort Document CSV

Fields:

Submission ID	Orig_Addr3	Proc_Addr3	NCOAMoveNote
Submission Date	Orig_Addr4	Proc_Addr4	NCOAMoveType
Submission Description	Orig_City	Proc_City	NCOAMoveEffective
Document Number	Orig_State	Proc_State	PieceNumber
Acocunt	Orig_Zip	Proc_Zip	IMBCCode
Orig_Name	Proc_Name	CleanseCode	DocumentID
Orig_Addr1	Proc_Addr1	ChangeDesc	
Orig_Addr2	Proc_Addr2	NCOAMatchFlag	

SubmissionID	SubmissionDate	SubmissionDesc	DocumentNum	Account	OrigName	OrigAddr1	OrigAddr2	OrigAddr3	OrigAddr4	OrigCity	OrigState	OrigZip	ProcName	ProcAddr1	ProcAddr2	ProcAddr3	ProcAddr4	Proc
"1270", "09/19/2016", "Demo test job 1", "1", "127848", "", "Mr John Smith", "111 School lane", "Bradley, Greenwood 29819", "", "", "E412", "", "", "", "0000000001", "0000000000000000000000", "000000904072", G3F5																		
"1270", "09/19/2016", "Demo test job 1", "2", "608408", "", "Mrs Maria Grainger", "208 Old hall street", "Pleasant grove, Utah 84042", "", "", "E412", "", "", "", "0000000002", "0000000000000000000000", "000000904073", G3F5																		
"1270", "09/19/2016", "Demo test job 1", "3", "802000", "", "Mr Tim Adams", "16 Lucania street", "Berne, Adams 46711", "", "", "E412", "", "", "", "0000000003", "0000000000000000000000", "000000904074", G3F5																		
"1270", "09/19/2016", "Demo test job 1", "4", "289865", "", "Mr Dave Campo", "145 Durning road", "Appleton, Swift 56208", "", "", "E412", "", "", "", "0000000004", "0000000000000000000000", "000000904075", G3F5																		
"1270", "09/19/2016", "Demo test job 1", "5", "657388", "", "Mr Harry Madison", "73 Pier head", "Bandon, Coos 97411", "", "", "E412", "", "", "", "0000000005", "0000000000000000000000", "000000904076", G3F5																		
"1270", "09/19/2016", "Demo test job 1", "6", "84532", "", "Mr Niel Tyson", "4482 N 42nd ave", "New York City, New York 10453", "", "", "E413", "", "", "", "0000000006", "0000000000000000000000", "000000904077", G3F5																		
"1270", "09/19/2016", "Demo test job 1", "7", "221486", "", "Ms Marie Curie", "55 Harris Road", "Austin, Texas 78610", "", "", "E413", "", "", "", "0000000007", "0000000000000000000000", "000000904078", G3F5																		
"1270", "09/19/2016", "Demo test job 1", "8", "869852", "", "Mr Louis Pasteur", "894 Beale St", "Memphis, Tennessee 38002", "", "", "E491", "", "", "", "0000000008", "0000000000000000000000", "000000904079", G3F5																		
"1270", "09/19/2016", "Demo test job 1", "9", "412536", "", "Mr Bill Nye", "9456 Wringer Ln", "Charlotte, Virginia 23923", "", "", "E412", "", "", "", "0000000009", "0000000000000000000000", "000000904080", G3F5																		
"1270", "09/19/2016", "Demo test job 1", "10", "54871", "", "Mr John Mulaney", "841 Buckhaven Dr", "Newport, Rhode Island 02801", "", "", "E412", "", "", "", "0000000010", "0000000000000000000000", "000000904081", G3F5																		
"1270", "09/19/2016", "Demo test job 1", "11", "31547", "", "Mr Mike Birbiglia", "862 Gaither Hill Rd", "Stowe, Vermont 5672", "", "", "E412", "", "", "", "0000000011", "0000000000000000000000", "000000904082", G3F5																		
"1270", "09/19/2016", "Demo test job 1", "12", "987544", "", "Mrs Renea Osbourne", "197 Gordan Blvd", "Reno, Nevada 89431", "", "", "E413", "", "", "", "0000000012", "0000000000000000000000", "000000904083", G3F5																		
"1270", "09/19/2016", "Demo test job 1", "13", "157486", "", "Mrs Susan Dean", "9632 Madison Rd", "Los Angeles, California 90001", "", "", "E413", "", "", "", "0000000013", "0000000000000000000000", "000000904084", G3F5																		
"1270", "09/19/2016", "Demo test job 1", "14", "12458", "", "Mr Bart Cates", "2174 Elk Ave", "Helena, Montana 59601", "", "", "E413", "", "", "", "0000000014", "0000000000000000000000", "000000904085", G3F5																		
"1270", "09/19/2016", "Demo test job 1", "15", "23548", "", "Mr Brandon Lampley", "947 Jefferson Rd", "Bismark, North Dakota 58501", "", "", "E491", "", "", "", "0000000015", "0000000000000000000000", "000000904086", G3F5																		
"1270", "09/19/2016", "Demo test job 1", "16", "941236", "", "Mr Tyler Kexley", "494 Franklin Ave", "Greenville, South Carolina 29607", "", "", "E491", "", "", "", "0000000016", "0000000000000000000000", "000000904087", G3F5																		
"1270", "09/19/2016", "Demo test job 1", "17", "254789", "", "Mrs Karlecia Butler", "5663 Oak Ave", "Jeffersonville, Indiana 47130", "", "", "E411", "", "", "", "0000000017", "0000000000000000000000", "000000904088", G3F5																		

Job Summary Submission Report

This report is a job report that shows a summary of the document types on all the submissions that are part of the job. It includes the breakdown of the number of documents submitted and printed, sheets printed and package count. It also includes a weight breakdown and a page breakdown.

Job Summary Submission Report

4/21/2025 9:26:18 AM

Page Group Breakdown:								
Page Group	Qualified	Unqualified	No Mail	Omitted	E-docs	E-docs Others	Total Packages	Total Pages
1 Page Documents	566	0	0	0	0	0	566	566
Total Printed	566	0	0	0	0	0	566	566

Job Summary Submission Report

4/21/2025 9:26:18 AM

Job Summary:					
Job ID : 461143					
Combined Files : 1					
Volume Summary:					
	DATA	PRINT			INSERT
Document Classification	Pages Submitted	Images Printed	Sheets Printed	Document Count	Package Count
Qualified	566	566	566	566	566
Unqualified	0	0	0	0	0
No Mail	0	0	0	0	0
Total Printed	566	566	566	566	566
Omitted	0	0	0	0	0
E-Docs	0	0	0	0	0
E-Docs Others	0	0	0	0	0
Total Not Printed	0	0	0	0	0
Total Submitted:	566	566	566	566	566
Weight Breakdown:					
Rate Class	Qualified	Unqualified	Total		
1 lb	566	0	566		
2 lb	0	0	0		
3 lb	0	0	0		
Over 3 lb	0	0	0		
Total Documents	566	0	566		

Mandrill HTML Emails Errors Report

The Mandrill HTML Email Errors report is created when the set number of hours pass after the Mandrill HTML Emails Submitted report is generated. If multiple reports are generated, the report will not be overwritten; the report file name will include the number of hours after the original Emails were sent. For example, a report named RPT00000000SUBMID_3.mee.pdf was generated three hours after the emails submitted report.

The following statuses will result in an error report being generated and emailed automatically.

- Hard Bounce
- Soft Bounce
- Spam Report
- Unsubscribe
- Rejected
- Delayed

Emails that have not yet been opened will be listed in the report with a status of sent. Once opened, the email will no longer be listed in future email error reports. If there are no error emails in a future report, the details will state no emails.

Mandrill HTML Emails Errors

Submission ID: 4852

Received Date Time: 12/12/2019 5:39:59 PM

Original File Name: UluroGasData_M_001.csv

Report Date Time: 12/12/2019 6:48:26 PM

Hours After Emails Sent: 1

Original Email Count: 1

Emails in Report: 1

Doc #	Name	Email Address	Email Subject	Sent To Mandrill	Mandrill Response
1	Samantha Turnbow	testing@	Marketing Tracked - M_001	12/12/2019 5:42:23 PM	testing@ ; Queued

Mandrill HTML Emails Submitted Report

The Mandrill HTML Emails Submitted report is created when the emails are sent to Mandrill. It lists all the HTML emails sent to Mandrill for that submission.

Mandrill HTML Emails Submitted

Submission ID: 4852

Received Date Time: 12/12/2019 5:39:59 PM

Original File Name: UluroGasData_M_001.csv

Report Date Time: 12/12/2019 5:48:24 PM

Email Count: 1

Doc #	Name	Email Address	Email Subject	Sent To Mandrill	Status	Status Details
1	Samantha Turnbow	testing@transfrm-qa.com	Marketing Tracked - M_001	12/12/2019 5:42:23 PM	S	testing@transfrm-qa.com;

Manifest Report

This report is a job report that shows each submission on the job. It shows the total number of qualified, unqualified and no mail documents for each submission.

Qualified are mailed documents that are cleansed and presorted.

Unqualified are mailed documents that were cleansed but could not be presorted.

Non-Mail are documents marked as “no mail”.

“Omit”, “Exclude” and “eStatement” documents are not included.

Manifest Report					4/21/2025 11:05:06 AM		
Job ID: 461149		MAIL.DAT Job ID:00461149					
Receive Date	Sub ID	Submitter Description	ID	Qualified	Unqualified	Non-Mail	Others
04/21/2025 10:29:46	FRET	Franklin Real Estate Tax	5130	12	139	0	849
Totals:				12	139	0	849

NCOA Move Report

This is a submission report that shows accounts that have reported a change of address. This report will only have data if the submission is marked to use NCOA.

Move types are:

I – Individual

F – Family

B - Business

NCOA Move Report					4/22/2025 8:06:15 AM
Submitter ID:		DANDUTIL	Dandridge Utility		
Receive Date:		04/22/2025 07:35:02			
Type	Move Date	Acct #	Acct Name	Previous Address	Current Address
I	12/01/2024	0001-002125-05	Lalik, Janeen Beth	1020 SCOZEL ST UNIT C NASHVILLE, TN 37208	1211A 5th Ave N Nashville TN 372082723

Presort Document CSV

This report is used for importing account data into an external system. The data reflects any accounts where the document was presorted. Both the original address and the new address are shown.

Fields:

SubmissionID	Orig_Addr3	Proc_Addr3	NCOAMoveNote
SubmissionDate	Orig_Addr4	Proc_Addr4	NCOAMoveType
SubmissionDesc	Orig_City	Proc_City	NCOAMoveEffective
DocumentNumber	Orig_State	Proc_State	PieceNumber
Account	Orig_Zip	Proc_Zip	IMBCode
Orig_Name	Proc_Name	CleanseCode	DocumentID
Orig_Addr1	Proc_Addr1	ChangeDesc	
Orig_Addr2	Proc_Addr2	NCOAMatchFlag	

```
"SubmissionID","SubmissionDate","SubmissionDesc","DocumentNumber","Account","Orig_Name","Orig_Addr1","Orig_Addr2","Orig_Addr3","Orig_Addr4","Orig_City","Orig_State","Orig_Zip",
"1921","09/07/2011","Medical Management 1","1","5154","UNDUIMIP BRSPSUSTADNOCRT","LEACHEMAIN SHRESPPRLEOPFR","14201 NORDHOFF ST #B1","","Franklin, TN 37064","","","UNDUIMIE
"1921","09/07/2011","Medical Management 1","2","6502","LOTOZOBE JACOLBRSETHFRFI","BIFEPS FUALNAGICAACHEJESE","14647 ERWIN STREET","","Jackson, TN 38305","","","LOTOZOBE JAC
"1921","09/07/2011","Medical Management 1","3","4657","ENQURODAVE ROBUTEPRLUPEFO","ANAEDI SWMESYGRCONOREXPR","14647 ERWIN STREET","","Nashville, TN 37207","","","ENQURODAVE
"1921","09/07/2011","Medical Management 1","4","5437","HEREPODE TRCOSUENDESPSHCA","PHENFA ASREBAECREPMUELAP","11347 EMELITA ST.# 3","","Jackson, TN 38305","","","HEREPODE I
"1921","09/07/2011","Medical Management 1","5","1220","UNOVSC REPOAPUNRUUNTEBAMO","NUINBEPOUN ELBOOVRECOACACU","13126 MILLRACE STREET","","Brentwood, TN 37024","","","UNOVSC
"1921","09/07/2011","Medical Management 1","6","5668","NOREMITOPI SANEMECENOTEAP","COPAANSO SOENACCOHOGGRASSO","14647 ERWIN ST","","Franklin, TN 37064","","","NOREMITOPI SAN
"1921","09/07/2011","Medical Management 1","17","7533","PRSTMEFRDEAU FLMYPISKBRPH","ROSUPAOUSANO BOFEIMAGUNTE","6205 FULTON AVE APT 17","","Jackson, TN 38305","","","PRSTMEF
"1921","09/07/2011","Medical Management 1","23","3622","SCUNPEHYRAININ LAGOPEMASE","ARBUI BOQCUPSCHSCFAUNOU","10050 MILWOOD AVE","","Murfressboro, TN 38501","","","SCUNPEH
"1921","09/07/2011","Medical Management 1","24","5154","UNDUIMIP BRSPSUSTADNOCRT","LEACHEMAIN SHRESPPRLEOPFR","14201 NORDHOFF ST #B1","","Franklin, TN 37064","","","UNDUIMI
"1921","09/07/2011","Medical Management 1","25","6502","LOTOZOBE JACOLBRSETHFRFI","BIFEPS FUALNAGICAACHEJESE","14647 ERWIN STREET","","Jackson, TN 38305","","","LOTOZOBE JA
"1921","09/07/2011","Medical Management 1","26","4657","ENQURODAVE ROBUTEPRLUPEFO","ANAEDI SWMESYGRCONOREXPR","14647 ERWIN STREET","","Nashville, TN 37207","","","ENQURODAV
"1921","09/07/2011","Medical Management 1","27","5437","HEREPODE TRCOSUENDESPSHCA","PHENFA ASREBAECREPMUELAP","11347 EMELITA ST.# 3","","Jackson, TN 38305","","","HEREPODE
"1921","09/07/2011","Medical Management 1","28","1220","UNOVSC REPOAPUNRUUNTEBAMO","NUINBEPOUN ELBOOVRECOACACU","13126 MILLRACE STREET","","Brentwood, TN 37024","","","UNOVSC
"1921","09/07/2011","Medical Management 1","29","5668","NOREMITOPI SANEMECENOTEAP","COPAANSO SOENACCOHOGGRASSO","14647 ERWIN ST","","Franklin, TN 37064","","","NOREMITOPI SAN
"1921","09/07/2011","Medical Management 1","40","7533","PRSTMEFRDEAU FLMYPISKBRPH","ROSUPAOUSANO BOFEIMAGUNTE","6205 FULTON AVE APT 17","","Jackson, TN 38305","","","PRSTMEF
"1921","09/07/2011","Medical Management 1","46","3622","SCUNPEHYRAININ LAGOPEMASE","ARBUI BOQCUPSCHSCFAUNOU","10050 MILWOOD AVE","","Murfressboro, TN 38501","","","SCUNPEH
"1921","09/07/2011","Medical Management 1","47","5154","UNDUIMIP BRSPSUSTADNOCRT","LEACHEMAIN SHRESPPRLEOPFR","14201 NORDHOFF ST #B1","","Franklin, TN 37064","","","UNDUIMI
"1921","09/07/2011","Medical Management 1","48","6502","LOTOZOBE JACOLBRSETHFRFI","BIFEPS FUALNAGICAACHEJESE","14647 ERWIN STREET","","Jackson, TN 38305","","","LOTOZOBE JA
"1921","09/07/2011","Medical Management 1","49","4657","ENQURODAVE ROBUTEPRLUPEFO","ANAEDI SWMESYGRCONOREXPR","14647 ERWIN STREET","","Nashville, TN 37207","","","ENQURODAV
"1921","09/07/2011","Medical Management 1","50","5437","HEREPODE TRCOSUENDESPSHCA","PHENFA ASREBAECREPMUELAP","11347 EMELITA ST.# 3","","Jackson, TN 38305","","","HEREPODE
"1921","09/07/2011","Medical Management 1","51","1220","UNOVSC REPOAPUNRUUNTEBAMO","NUINBEPOUN ELBOOVRECOACACU","13126 MILLRACE STREET","","Brentwood, TN 37024","","","UNOVSC
"1921","09/07/2011","Medical Management 1","52","5668","NOREMITOPI SANEMECENOTEAP","COPAANSO SOENACCOHOGGRASSO","14647 ERWIN ST","","Franklin, TN 37064","","","NOREMITOPI SAN
"1921","09/07/2011","Medical Management 1","63","7533","PRSTMEFRDEAU FLMYPISKBRPH","ROSUPAOUSANO BOFEIMAGUNTE","6205 FULTON AVE APT 17","","Jackson, TN 38305","","","PRSTMEF
"1921","09/07/2011","Medical Management 1","69","3622","SCUNPEHYRAININ LAGOPEMASE","ARBUI BOQCUPSCHSCFAUNOU","10050 MILWOOD AVE","","Murfressboro, TN 38501","","","SCUNPEH
"1921","09/07/2011","Medical Management 1","70","5154","UNDUIMIP BRSPSUSTADNOCRT","LEACHEMAIN SHRESPPRLEOPFR","14201 NORDHOFF ST #B1","","Franklin, TN 37064","","","UNDUIMI
"1921","09/07/2011","Medical Management 1","71","6502","LOTOZOBE JACOLBRSETHFRFI","BIFEPS FUALNAGICAACHEJESE","14647 ERWIN STREET","","Jackson, TN 38305","","","LOTOZOBE JA
"1921","09/07/2011","Medical Management 1","72","4657","ENQURODAVE ROBUTEPRLUPEFO","ANAEDI SWMESYGRCONOREXPR","14647 ERWIN STREET","","Nashville, TN 37207","","","ENQURODAV
"1921","09/07/2011","Medical Management 1","73","5437","HEREPODE TRCOSUENDESPSHCA","PHENFA ASREBAECREPMUELAP","11347 EMELITA ST.# 3","","Jackson, TN 38305","","","HEREPODE
"1921","09/07/2011","Medical Management 1","74","1220","UNOVSC REPOAPUNRUUNTEBAMO","NUINBEPOUN ELBOOVRECOACACU","13126 MILLRACE STREET","","Brentwood, TN 37024","","","UNOVSC
"1921","09/07/2011","Medical Management 1","75","5668","NOREMITOPI SANEMECENOTEAP","COPAANSO SOENACCOHOGGRASSO","14647 ERWIN ST","","Franklin, TN 37064","","","NOREMITOPI SAN
"1921","09/07/2011","Medical Management 1","86","7533","PRSTMEFRDEAU FLMYPISKBRPH","ROSUPAOUSANO BOFEIMAGUNTE","6205 FULTON AVE APT 17","","Jackson, TN 38305","","","PRSTMEF
"1921","09/07/2011","Medical Management 1","92","3622","SCUNPEHYRAININ LAGOPEMASE","ARBUI BOQCUPSCHSCFAUNOU","10050 MILWOOD AVE","","Murfressboro, TN 38501","","","SCUNPEH
"1921","09/07/2011","Medical Management 1","93","5154","UNDUIMIP BRSPSUSTADNOCRT","LEACHEMAIN SHRESPPRLEOPFR","14201 NORDHOFF ST #B1","","Franklin, TN 37064","","","UNDUIMI
"1921","09/07/2011","Medical Management 1","94","6502","LOTOZOBE JACOLBRSETHFRFI","BIFEPS FUALNAGICAACHEJESE","14647 ERWIN STREET","","Jackson, TN 38305","","","LOTOZOBE JA
"1921","09/07/2011","Medical Management 1","95","4657","ENQURODAVE ROBUTEPRLUPEFO","ANAEDI SWMESYGRCONOREXPR","14647 ERWIN STREET","","Nashville, TN 37207","","","ENQURODAV
"1921","09/07/2011","Medical Management 1","96","5437","HEREPODE TRCOSUENDESPSHCA","PHENFA ASREBAECREPMUELAP","11347 EMELITA ST.# 3","","Jackson, TN 38305","","","HEREPODE
```

Print Summary Report

This report will be created once the status of the Job is Complete.

FIRST-CLASS MAIL

Page 1 of 2

Report:	Postage Summary Report	Sequence Number:	091251
Mailer:	StatementOut	Mailer ID:	1739
Entry Point:	37097	Software Info:	Satori Architect v. 2.10.0
Sort:	First Class Mail	List Name:	1739
Date:	Jan 09, 2017		

Part A: Automation Rates

A13	Part A Total (Add lines A1-A12)	0
-----	---------------------------------	---

Full Service Intelligent Mail Option

A14	DISPLAY ONLY	Postcards - Number of pieces that comply	@Pieces x \$ 0.003 =	
A15	DISPLAY ONLY	Letters - Number of pieces that comply	@Pieces x \$ 0.003 =	
A16	DISPLAY ONLY	Flats - Number of pieces that comply	@Pieces x \$ 0.003 =	

Part B: Nonautomation Rates

Piece Weight: 1

Postcards		Price	No. of Pieces	Subtotal Postage	Discount Total	Fee Total	Total Postage
(eligible for postcard price)							
B1	Presorted	.058					
B2	Single-Piece	.130					

Letters		Price	No. of Pieces	Subtotal Postage	Discount Total	Fee Total	Total Postage
B3	Presorted						
B4	Residual Nonpresorted From First-Class Mail Mailing (Up to and Including 1 oz.)						
B5	Residual Single-Piece From First-Class Mail Mailing (Includes up to 1 oz. and Between 1 oz. and 2 oz.)						
B6	Residual Nonpresorted From First-Class Mail Mailing Which is All Greater Than 1 oz. Up to and Including 2 oz.						
B7	Nonpresorted/Single Piece*	0.465	20	9.300			9.3000
B8	Single-Piece From Standard Mail Mailing						

* First-Class Mail metered letter price

Nonmachinable Letters		Price	No. of Pieces	Subtotal Postage	Discount Total	Fee Total	Total Postage
B9	Presorted						
B10	Nonpresorted/Single-Piece						
B11	Single-Piece From Standard Mail Mailing						
B12	Nonmachinable Surcharge * (for presorted letters)	.130					
B13	Nonmachinable Surcharge * (for single-piece letters)	.130					

* Only on FCM letters with one or more nonmachinable characteristics

Flats		Price	No. of Pieces	Subtotal Postage	Discount Total	Fee Total	Total Postage
B14	Presorted						
B15	Single-Piece						
B16	Single-Piece From Standard Mail Mailing						

Return Address Summary

Return Address Summary Report

4/21/2025 9:26:03 AM

Submission ID: 5128

Receive Date: 04/21/2025

Client Return Address	Documents Received
UNITED HEALTHCARE	2
VENITA SUE GREEN	1
VERONICA HALL	1
VERONICA L DANIEL	1
VNA EMPLOYEE HEALTH	3
VUTHY SIENG	1
WALLACE BOGGS PLLC	3
WARREN LAW P C	3
WAYNE BULLINGTON	1
WEISSER AND WOLF	3
WELLMARK BLUECROSS BLUESHIELD	3
WICKER SMITH OHARA MCCOY ETAL	2
WILLIAM F KEMP LAW OFFICE	3
WILLIAM M WOHL	3
WILLIAM VERMILLION	1
WILLIAM WALL	1
YANOVER AND YANOVER	3
YVONNE D MILLER	1
Total:	566

Submission Breakdown Report

This is a submission report that shows a summary of the number of documents, extra pages, input and output pages. It also shows the breakdown of the trays and what they contain. It also shows a breakdown of the number of pages per document for qualified and unqualified.

SUBMISSION BREAKDOWN REPORT

Original Submission File: monrovia081211.pdf.xml.out

Submission ID: 1924

Client: This is a new test customer

Submitter ID: mon

Name: mon1

Job ID: 1135

Total Number of Documents: 277

Number with Extra Pages: 277

Total Number of Input Pages: 1292

Avg. per Doc.: 4.6643

Number of Documents Cleansed: 277

Number of Documents w/ +4 zip: 0

Number of Documents w/ DPBC: 0

Number of Documents Barcodable: 0

Documents Presort Qualified: 50

Number of Documents Generated: 277

Number Documents with Extra Printed Pages: 277

Number of Documents w/ > 4 pages: 78

Number of Documents w/ > 5 pages: 52

Total Number of Output Pages: 1292

Avg. per Doc.: 4.6643

Tray#	Total	=	1 Page	+	2 Page	+	Multi	+	Heavy
0 - Unqual	227		0		91		78		58
1	50		0		16		14		20
Qualified:	50		0		16		14		20
Total:	277		0		107		92		78

Submission Detail Report

This is a submission report that shows details of the accounts included in the submission.

It includes a sum of the account balances.

Submission Detail Report

8/4/2011 2:01:52 PM

Original Submission File: LargeTestFile.xml

Submission ID: 1813

Job ID: 1108

Client: 123

Submitter ID: xmltestA XMLTEST

Receive Date: 07/29/2011 14:30:42

Acct ID	Acct Name	Amount	Exclusions	eStatement
330985	Homer Simpson 11544	\$15.22		N
330990	Homer Simpson 11545	\$66.65		N
330992	Homer Simpson 11546	\$19.54		N
330997	Homer Simpson 11547	\$20.49		N
330999	Homer Simpson 11548	\$51.70		N
331002	Homer Simpson 11549	\$39.08		N
331004	Homer Simpson 11550	\$20.06		N
331007	Homer Simpson 11551	\$36.21		N
331009	Homer Simpson 11552	\$19.54		N
331011	Homer Simpson 11553	\$36.14		N
331015	Homer Simpson 11554	\$52.01		N
331101	Homer Simpson 11555	\$30.35		N
331223	Homer Simpson 11556	\$49.73		N
331237	Homer Simpson 11557	\$29.86		N
331246	Homer Simpson 11558	\$3.32		N
331259	Homer Simpson 11559	\$104.05		N
331316	Homer Simpson 11560	\$73.87		N
331415	Homer Simpson 11561	\$16.62		N

Document Count: 11562

Total: \$650,933.39

Page 297

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:

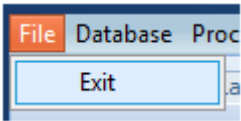
Submission Email Report			1/9/2025 10:58:56 AM
Original Submission File:20180130162154426WaterDemo			Process Date:
Submission ID: 4536			
Client: Transformations Testing		Submitter ID: Payments Payments Testing	
Acct ID	Acct Name	Email Address	Combined
257565	Roy Adams	rmeyer@transfrm.com;vandy1fan@comca	1
557762	Peter Gabrial	rmeyer@transfrm.com;vandy1fan@comca	
4340982	Lane Smith	rmeyer@transfrm.com;vandy1fan@comca	
2385300	Henry Ford	vandy1fan@comcast.net;rmeyer@transfr	1
		Total Emails -	4 Total Combined - 2

JobTicketPrint.exe

JobTicketPrint.exe must be running on a machine that has access to the dedicated report printer from uSetup > Configure > Fax and Report Printer.

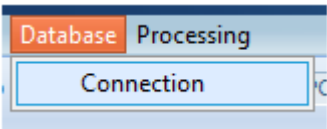
Exit the Program

To exit the program, go to File and select exit. You can also close out of the program using the X in the top right corner.



Database Connection

The first time you login, you will be asked to set up your connection parameters. You can change this at any time by selecting Connection in the Database menu.



Server: This is the SQL server name

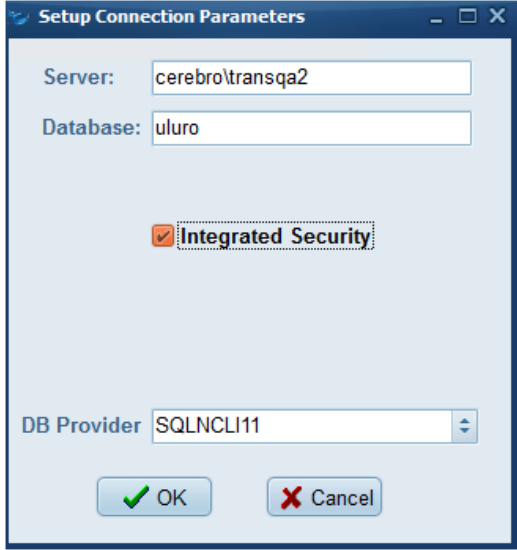
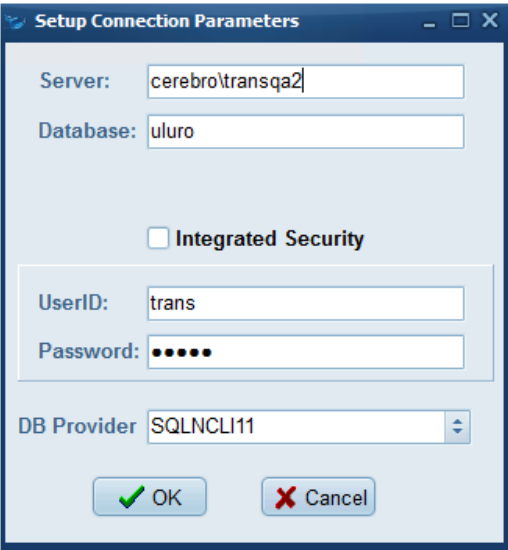
Database: This should always be Relay Unify.

User ID – This is typically trans, or whatever the SQL database connection login is, which is not stored anywhere.

User ID – This is typically trans, or whatever the password for the SQL server login is, which is also not stored anywhere.

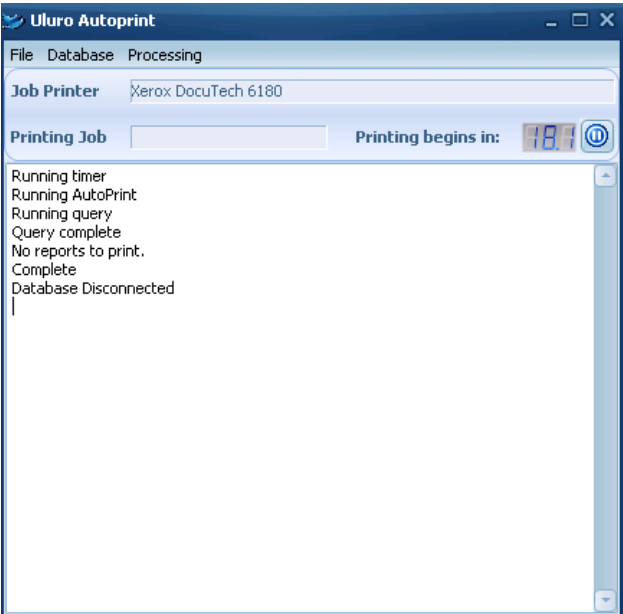
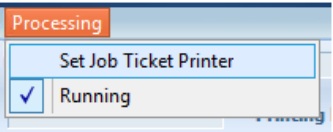
Integrated Security (Windows) – If this is checked, then the Windows domain user login for the SQL server will be used for UserID/PW. (this is not recommended)

DB Provider – If you are not using TLS select SQLOLEDB. If you are using TLS 1.2 select either SQLNCLI11 or MSOLEDBSQL.



Reports that have been set up to autoprint will be printed by JobTicketPrint.exe. For the reports to print, this program needs to be running in the background. The program cycles every 20 seconds and the reports that have been generated will then be printed.

This program will also print the Submission Tickets that have been set up for Autoprint.



Report Grouping

Report groups allow grouping of submission level reports only.

Click New.

Description – Enter a unique description for this report group.

Enable – Check this to enable the report group.

Output Type – Select whether the reports should be printed, emailed, or both.

These reports will not be emailed or printed until all the reports in the report group have been generated.

Select Printer – Select a printer to print the reports.

Save.

Report Grouping

Description

Report_Group_Demo

☒ Enabled

OUTPUT TYPE

☐ Print Only ☐ Email Only ☒ Both

Select Printer

CutePDF Writer

AVAILABLE REPORTS

Mandril HTML Emails Errors	.PDF
Mandril HTML Emails Submitted	.PDF
Move Update Report	.TXT
NCOA Move Report	.PDF
PreGenReport_UCampaign	.TXT
PreGenReport_UluroTraining	.TXT
Presort Document CSV	.CSV

ADD →

← REMOVE

GROUPED REPORTS

CRM Cass Summary Report	.PDF	
CRM Cleanse Report	.PDF	
CRM Move Update CSV Report	.CSV	
CRM Move Update Report	.PDF	
Global_Pregen_Report	.TXT	
Itemized Submission Report	.PDF	
Return Address Summary	.PDF	

Save

Close

Select the desired reports from Available Reports and use the left facing arrow to add them to the Grouped Reports for this report group. The available reports are only submission level reports, including Pregen reports, Doc Pull Reports, and Autoprint Reports. The Extension (Ext) column shows the type of file each report creates.

To change the properties of a report in a group, click on the edit button after it's been added to the Grouped Reports.

Select Printer. This will override the printer on the group.

Submission Status. This will create the report at this status, if the selected status occurs before the normal creating process.

Select the desired print order for the reports that will be printed.

Report Grouping Detail Properties

Report

CRM Move Update CSV Report

Select Printer

CutePDF Writer

Submission Status

Print Order

1

Save

Close

Creating Report Group Email Events

Report group email events are created within the **Setup Email Events** on the Emails tab in a submission type.

Select the Event Report Group.

Choose the specific report group from the dropdown of groups that have been set up.

If this email is not set up, the report group and corresponding reports will not be emailed.

Report Group Emails for Custom Reports will use ReportName and Location from the subjobrpt table in the Relay Unify DB if they are not blank. Those fields will need to have a value prior to PDFEmail being run to create the report.

Email Notification Events

Event
Report Group

To Email Addresses
pb@pb.com

Subject
Report Group

☐ HTML Format [View HTML](#)

Body
#CUSTNAME#
Submission:
#SUBNAME#
#SUBMID#

AVAILABLE TAGS
#AllowDownloadCSV#
#ALLOWEDITEXCLUSIONS#
#AllowFutPay#
#AllowPartPay#
#AllowPay#
#AllowPayDet#

Report Group
Report_Group_Demo

☒ Enable Tracking

[Save](#) [Close](#)

Reports Tab in Web Setup / Reports Main on uSetup Main Page

From the Reports menu in usetup the following are available:

- MultiChannel Delivery Report
- Submission Usage Report

The following reports are also available in the reports tab under Web Setup:

- MultiChannel Delivery Report

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
---------------	----------

The report contains the following fields:

Output Type	JobDate	TotalImages	TotalSuppliedInserts
SubmissionID	JobTime	FirstImages	Insert1
JobID	FormName	SubImages	Insert2
PrintJobID	InputFileName	EInsertImages	Insert3
Print Config. Description	TotalSheets	FrontImages	Insert4
CustomerName	FirstSheets	BackImages	Insert5
CustID	SubSheets	EInsertFrontImages	Insert6
Submission Type ID	TotalEInsertSheets	EInsertBackImages	UnitsMailed

Under1oz
Between1and2oz
Between2and3oz

Greater3oz
ForeignPackages
UnqualifiedDocs

NCOAProcessed
NCOAMoved
CostCenter

RipCount

```
"Output Type","SubmissionID","JobID","PrintJobID","Print Config. Description","CustomerName","CustId","Submission Type ID","JobDate","JobTime","FormName","InputFilename","TotalSheets",  
"Print","1619","1083","992","1 pagers","Feature Demos","135","168","06/30/2017","10:14:30","", "2017010412375284913627","6.00","6.00","0.00","0.00","12.00","6.00","6.00","0.00","6.00",  
"Print","1619","1083","992","1 pagers","Feature Demos","135","168","06/30/2017","10:14:30","", "2017010412375284913627","13.00","13.00","0.00","0.00","26.00","13.00","13.00","0.00","13.00",  
"Print","1619","1083","992","1 pagers","Feature Demos","135","168","06/30/2017","10:14:30","", "2017010412375284913627","29.00","29.00","0.00","0.00","58.00","29.00","29.00","0.00","29.00",  
"Print","1619","1083","992","1 pagers","Feature Demos","135","168","06/30/2017","10:14:30","", "2017010412375284913627","15.00","15.00","0.00","0.00","30.00","15.00","15.00","0.00","15.00",  
"Print","1619","1083","992","1 pagers","Feature Demos","135","168","06/30/2017","10:14:30","", "2017010412375284913627","50.00","50.00","0.00","0.00","100.00","50.00","50.00","0.00","50.00",  
"Print","1619","1083","992","1 pagers","Feature Demos","135","168","06/30/2017","10:14:30","", "2017010412375284913627","40.00","40.00","0.00","0.00","80.00","40.00","40.00","0.00","40.00",  
"Print","1619","1083","992","1 pagers","Feature Demos","135","168","06/30/2017","10:14:30","", "2017010412375284913627","9.00","9.00","0.00","0.00","18.00","9.00","9.00","0.00","9.00",
```

Multi Channel Delivery Report

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

Enter the submission ID or the date range.

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

UDELIVER - REPORTS Global Settings

MULTI-CHANNEL DELIVERY REPORT

Report only shows submissions with Email, SMS, or IVR

Customer
<ALL>

Submid
0

Start Date
01/01/2025

End Date
01/01/2025

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

Download as Delimited Download PDF

Multi-Channel Delivery Report

Account #/Name	Sub ID	PO #	Sub Type Name	Subm ID	# Text	# Email	# Phone	Call Duration						Trans
								<= 1:00	1:01-2:00	2:01-3:00	3:01-4:00	4:01-5:00	> 5:00	
Uluro Demos	WaterDe		Water Demo	64346	3	0	0	0	0	0	0	0	0	0
Uluro Demos	WaterDe		Water Demo	64347	3	0	0	0	0	0	0	0	0	0
Uluro Demos	WaterDe		Water Demo	64348	3	0	0	0	0	0	0	0	0	0
Uluro Demos	WaterDe		Water Demo	64394	1	0	0	0	0	0	0	0	0	0
Uluro Demos	WaterDe		Water Demo	64395	4	0	0	0	0	0	0	0	0	0
Uluro Demos	WaterDe		Water Demo	64419	4	0	0	0	0	0	0	0	0	0
Uluro Demos	WaterDe		Water Demo	64420	1	0	0	0	0	0	0	0	0	0
Uluro Demos	WaterDe		Water Demo	64421	2	0	0	0	0	0	0	0	0	0
Uluro Demos	WaterDe		Water Demo	64423	2	0	0	0	0	0	0	0	0	0
Uluro Demos	WaterDe		Water Demo	64424	2	0	0	0	0	0	0	0	0	0
Uluro Demos	Gas Demo		Uluro Gas Demo	64524	2	0	0	0	0	0	0	0	0	0

Submission Type Usage Report

You can select one customer/submission type or all customers/submission types.

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

It is output as a CSV file containing the following fields:

CustomerID	Customer Name	
Submission ID		
Submission Type	Submission Description	Number of Submissions
Last Use date		

REPORTS - GENERATED REPORTS
Global Settings

Billing Report
Alternate Billing Report
Submission Usage Report

SUBMISSION USAGE REPORT

Customer
<ALL>

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

Save Report

Example of all customers:

	1	2	3	4	5	6	7
25	5110	CRM Integration Testing	34190	CRM2	CASS To Presort Standard Mail	70	2/13/2025
26	5110	CRM Integration Testing	34195	CRM7	CRM Parcel Basic	0	
27	5110	CRM Integration Testing	34196	CRM8	CRM Parcel Full	0	
28	5110	CRM Integration Testing	34201	CRM1L	CRM1 Large	12	10/17/2024
29	5110	CRM Integration Testing	34189	CRM1	NCOA AND PRESORT TOGETHER	178	4/9/2025
30	5110	CRM Integration Testing	34193	CRM5	NCOA To Presort FirstClass	0	
31	5110	CRM Integration Testing	34192	CRM4	NCOA To Presort SANS IMB	81	3/17/2025
32	5110	CRM Integration Testing	34194	CRM6	NCOA To Presort Standard	0	
33	5110	CRM Integration Testing	34191	CRM3	NCOA to Presort Standard	300	3/17/2025
34	200	Customer Audit History testing	34065	audit1	Audit history Testing	0	
35	200	Customer Audit History testing	34131	R34732	Create Command Line program to unprotect	0	
36	177	Cynthia QC Testing	663	1388	1388 QC testing	5	10/12/2021
37	177	Cynthia QC Testing	34019	2023Gas	2023 uSecure Gas demo	17	5/12/2023
38	177	Cynthia QC Testing	34152	34152	34152 Testing	1	4/22/2024
39	177	Cynthia QC Testing	657	34210	34210 QC Testing	47	8/5/2021

Example for an individual customer:

	1	2	3	4	5	6	7
1	CustomerID	CustomerName	SubmissionTypeID	SubmissionType	SubmissionDescription	NumberOfSubmissions	LastUseDate
2	66	Default Client	34233	PB_Energy	Pitney Bowes Energy	4	4/7/2025
3	66	Default Client	34232	RU_Gas	Relay Unify Gas	2	4/4/2025
4							
5							
6							
7							

Displaying Custom Reports on the Web, in uControl, and uPrint

Adding Report to Relay Unify

The Report to the Reports table.

The Report table contains:

RepDesc – Description of the report (less than 30)

Createby – Who added the report.

Status – Status of the report (A for Active)

FileSpec – Naming of the File. Unique name must be created for every Submission report. Change to suit. Must contain %S for Submission id. Must contain the file extension (pdf, XLS, txt, doc, etc).

Report Type – All submission level reports should be Report type S

AutoGen – AutoGen should be set to 'Y' so Relay Unify does not attempt to create the report.

ReportDLL – This should always be Null or Blank.

AutoPrint – This should always be N or Null. Auto Printing of these reports is not supported.

PrintOrder – This should always be null

PrintCopies – This should always be null

Adding Submission Report

To allow display on the Web the report must be linked to the Submission.

This is accomplished by adding the report to the SubJobRpt table.

The SubJobRPT table contains

Submid – Submission id

Jobid – Job ID for Job reports. Always null

Rptid – Link to Report table record for new report

CreateDate – Date and time the SubjobRpt record was created

ReportDate – Date and time the report was created.

CreatedFlag – Set to Y if the report is created. Set to N if the report is not created, and X if the Report is cancelled.

Location – Location of the Report File (less than 200 characters)

MailItem_ID – Leave Null.

EmailCreated – Leave Null

Printed – Leave Null

PrintedDate – Leave Null

To add the Report Record and/or the Submission Report Record

Run the script AddReportRecord.sql

This script is to be used to add custom reports to Relay Unify for viewing on the web or in uControl.

The required fields are:

@ReportDescription - The report description. This is used to determine which report record to use.

@UniqueShortDesc - This will be part of the file name

@ReportExtension - The file extension of the report file

To create the subjobrpt record, set the @Submid variable to a valid submission id

If a subjobrpt record is to be created, the file associated with it should exist and be placed in the submit\rpt folder.

The file name must be as described below. See variable @FileSpec.

Creating Submission Report with Post Processing

The Post Processing Service can call a program.

Batch File

Create a Batch file for the Post Processing to call. The Batch file will need to do the following

Change directory to the location of the Program that will generate the report

Call the program and pass into the program the parameters.

Have the program call the script, imputing the appropriate values.

Accept the Input Parameters.

Currently these parameters can be:

\$Submid – Submission id

\$File – Current File name

\$Ofile – Original File name

\$FPATH – Current path of the file

These are passed on the Command line as individual space separated parameters. The parameter name is not passed.

Generate the report.

Put the Report into a location accessible for the web server (not accessible from the internet).

Naming Custom Reports

Report Group Emails for Custom Reports will use ReportName and Location from the subjobrpt table in the Relay Unify DB if they are not blank. Those fields will need to have a value prior to PDFEmail being run to create the report.

Services

To see the services that are running, select Monitor Services under the Global Settings menu in uSetup.

Setup

Monitor Services

Monitor Service Status

◀ Back to Dashboard

Monitor Services

Processes & Directories

Business Classifications

Select the color for the running services. The running services will have a check in the last column as well.

Select the color for the Idle services that are installed but are not currently running.

More information about the services can be found in the Task Manager under services or by going to the Services.

SYSTEM SERVICES

Global Settings

PROCESS ACTIVE

i

PROCESS INACTIVE

i

Search:

R	SERVICE NAME	IP ADDRESS	LAST UPDATED	# PROCS	*
	CommonServices	192.168.1.200	4/9/2025 11:52:17 AM	1	☒
	uConnectSrv	192.168.1.100	4/9/2025 11:54:08 AM	1	☒
	uConnectSrv	192.168.1.202	7/17/2024 3:39:34 PM	1	☐
	UluroAddressCleansingService	192.168.1.223	1/17/2025 1:47:16 PM	0	☐
	UluroAddressCleansingService	192.168.1.100	3/10/2025 11:09:37 AM	0	☐
	UluroAddressCleansingService	192.168.1.25	2/15/2023 9:00:08 AM	0	☐
	UluroAddressCleansingService	192.168.1.202	7/17/2024 3:40:11 PM	0	☐
	UluroBreakPackService	192.168.1.100	4/9/2025 11:54:13 AM	0	☒
	UluroBreakPackService	192.168.1.202	7/17/2024 3:40:11 PM	0	☐
	UluroPayImportService	192.168.1.202	7/17/2024 3:40:10 PM	0	☐

Showing 1 to 10 of 54 entries

Previous

1

2

3

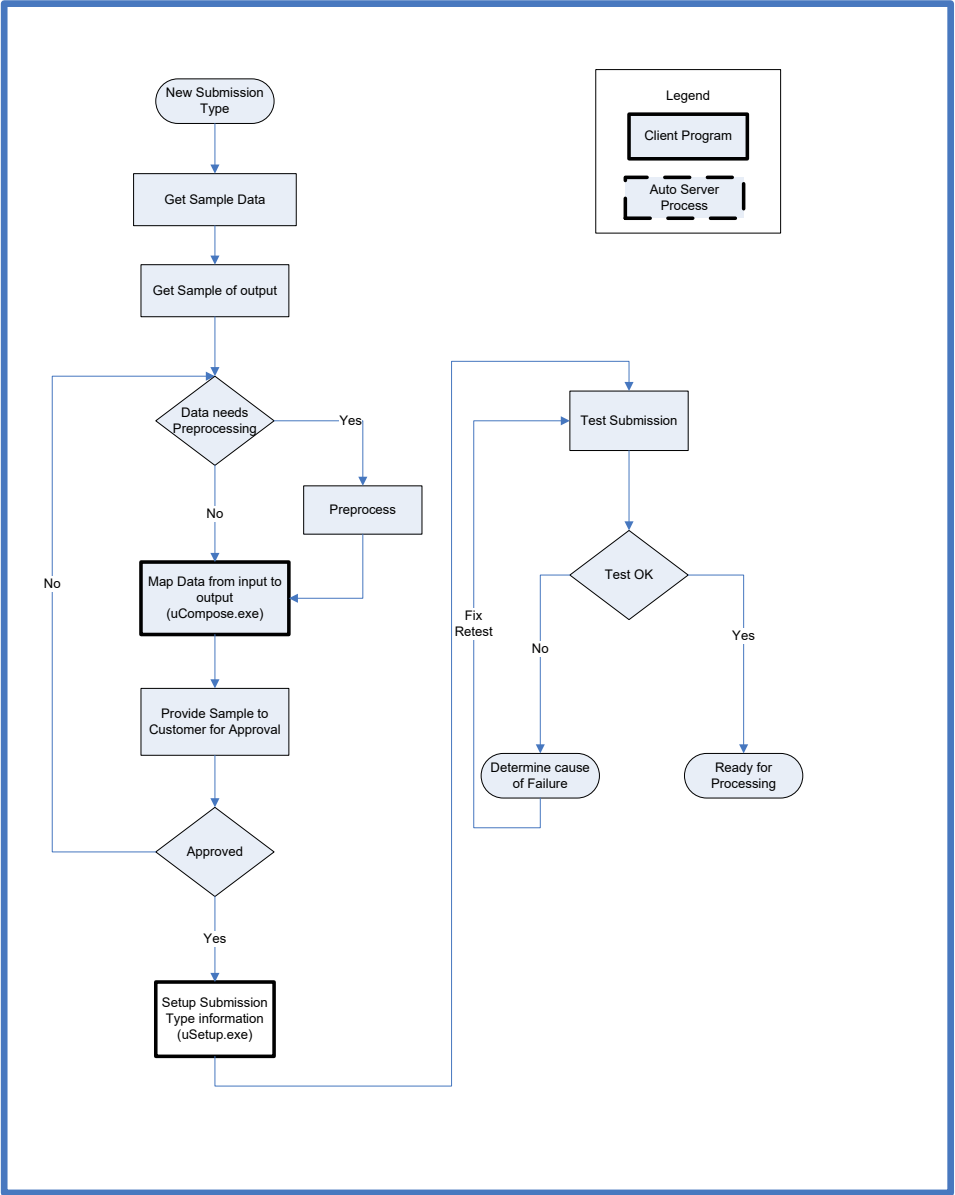
4

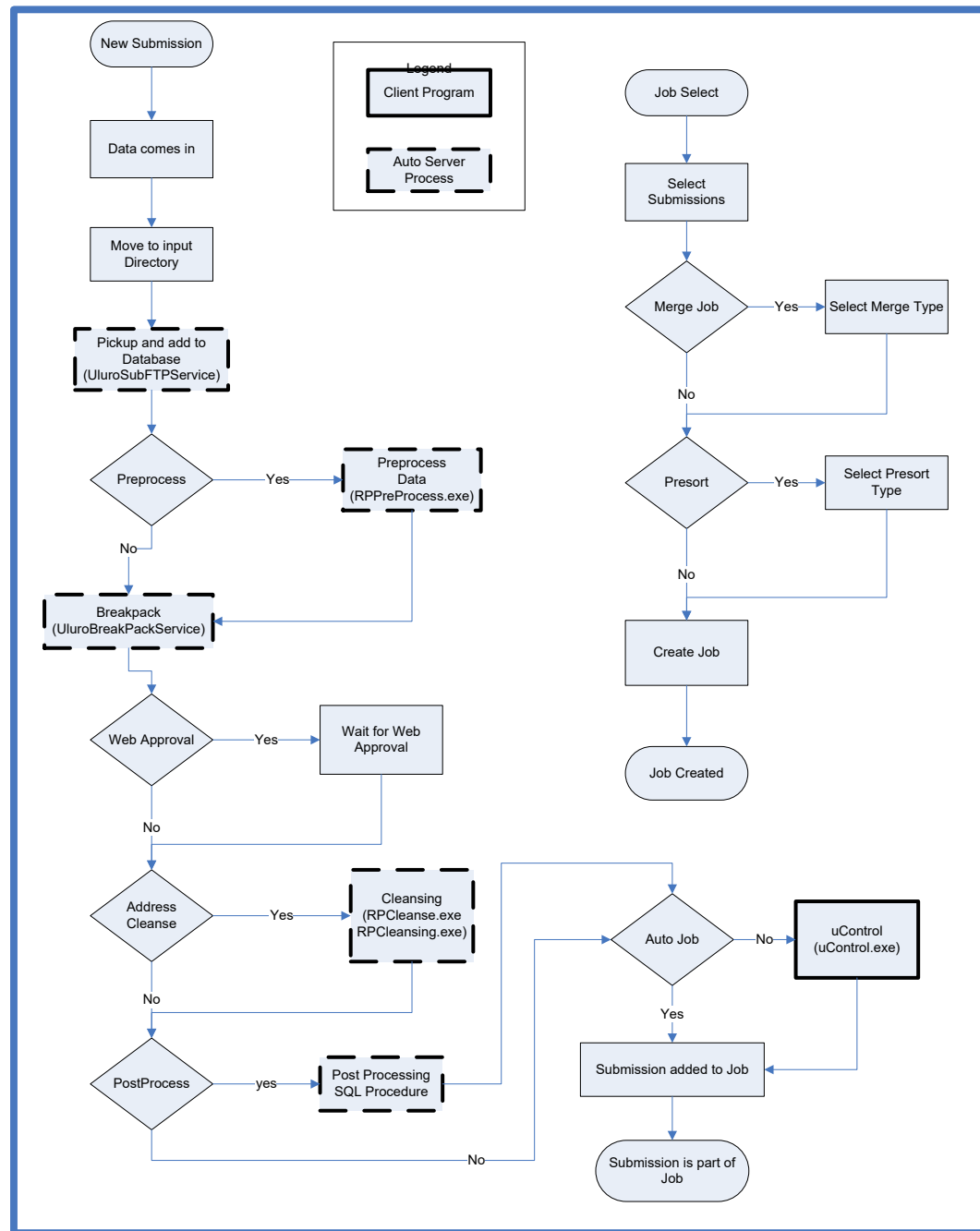
5

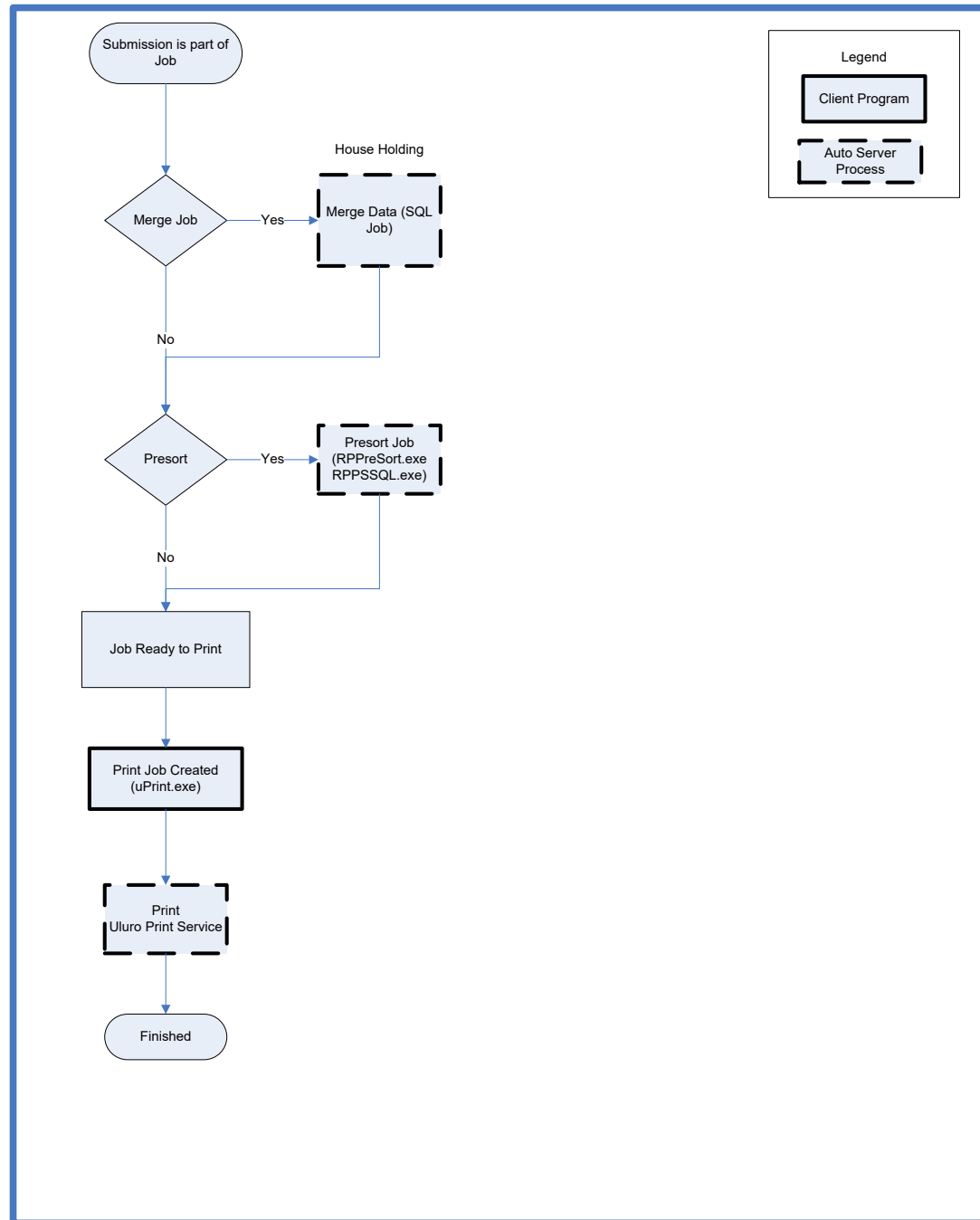
6

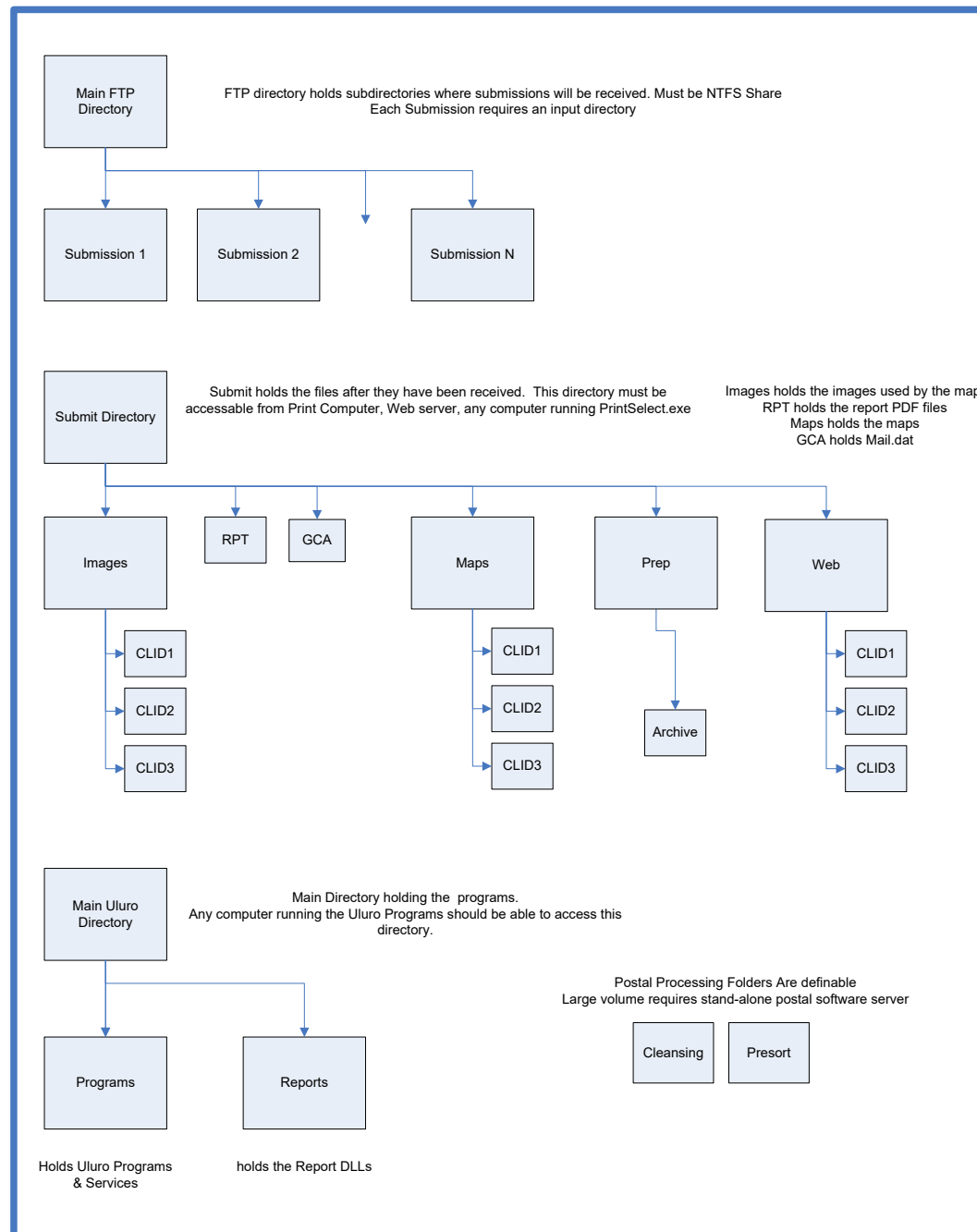
Next

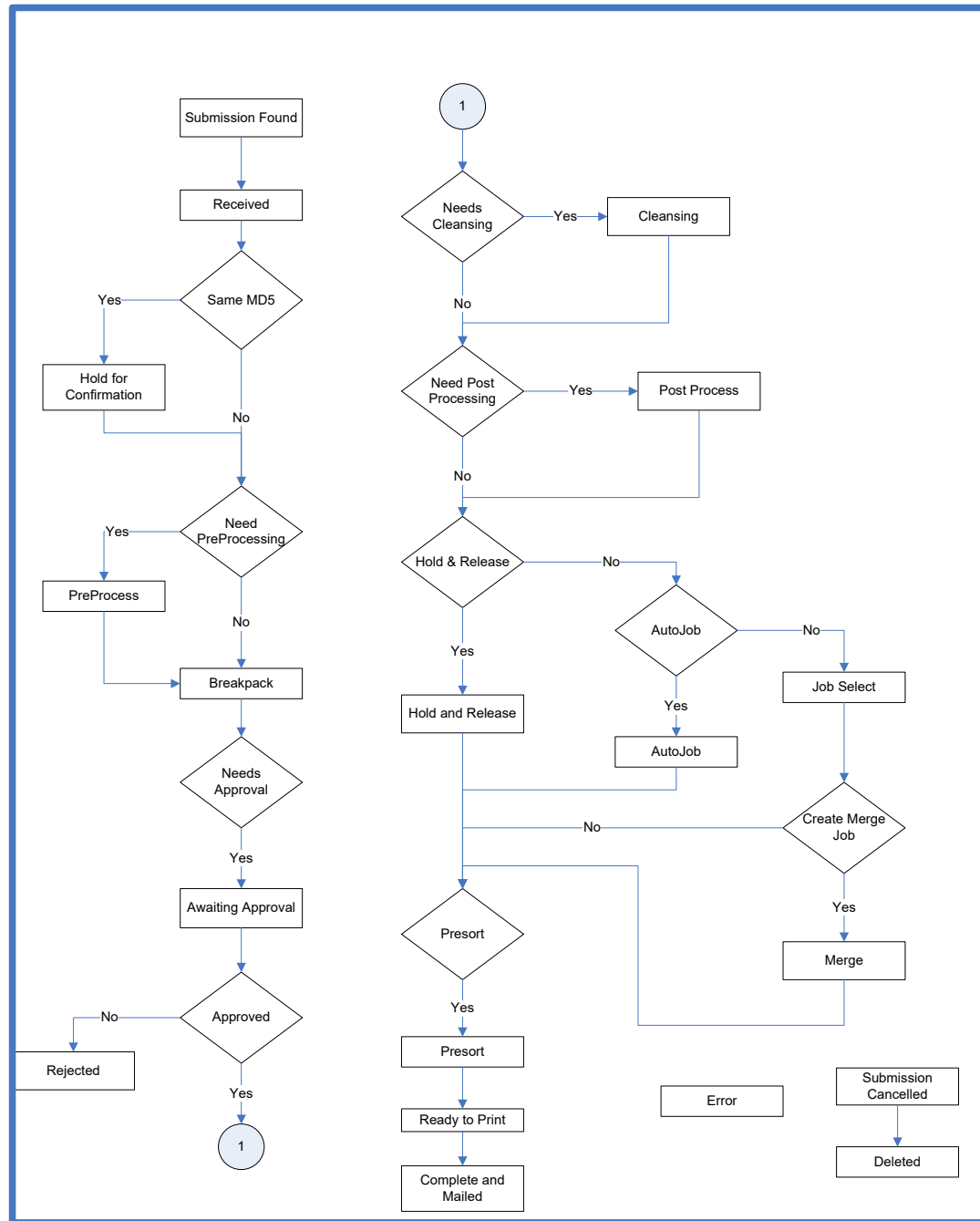
Workflow Process Flow











Relay Unify Glossary

Users:

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

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

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

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

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

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

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

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

Presort – In bins for mailing.

Cleanse – Make sure addresses are correct and updates them.

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

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

Job – A job consists of one or more submissions.

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

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

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

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