



User Guide

External Postage Interface Add On
V21.1.0200

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EFI PrintStream | V21.1.0200 External Postage Interface User Guide

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Table of Contents

Introduction	4
Overview	4
Contact Information	4
PrintStream Setup	5
Using the PrintStream EPI Program	5
Select External Imports.....	6
Export to Postal System	9
Verify or Create Statements	10
How the Interface Works Windowbook	10
PrintStream/EPI Interface	12
Setting up the PrintStream Interface in Windowbook	12
Dat-Mail Drop Data Transfer Setup	12
Dat-Mail Statement Printing and Post Master Setup.....	12
Enabling PrintStream Interface in Post Master or DAT-MAIL Statement Printing Program	13
PrintStream Settings Dialog - allows disabling of interface on a single workstation	13
Jobshop Export Screen where postage export is defined.	13
Jobshop Export Settings where you enable PrintStream export and define export path	14
IMXML Dialog with setup options.....	14
Setting up the PrintStream Interface in Monticello	15
Dat-Mail Drop Data Transfer Setup	15
Dat-Mail Statement Printing and Post Master Setup.....	16
Enabling PrintStream Interface in Post Master or DAT-MAIL Statement Printing Program	16
PrintStream Settings Dialog - allows disabling of interface on a single workstation	16
Jobshop Export Screen where postage export is defined	16
Jobshop Export Settings where you enable PrintStream export and define export path	17
IMXML Dialog with setup options.....	18
Creating an XML file in Windowbook	19
XML Drop Export Dialog with a valid PrintStream Job and Client selected.....	20
Import Verified Statement Data Into PrintStream.....	20
Creating an XML file in Monticello	20

Introduction

Overview

The External Postage Interface (EPI) allows users to interface between PrintStream and third party Mailing Software, such as Windowbook or Monticello. PrintStream users can enjoy the best features of both products without redundant data entry. The key benefits of the interface are:

1. Drops can be setup and scheduled in the Mailing Software, and then transferred to PrintStream where they are used to define list counts and drops.
2. Statements and list counts generated in PrintStream can be transferred back into the Mailing Software for final editing and printing, and to take advantage of the additional reports available from these products.
3. Statements can be verified in the Mailing Software and the final statement postage transferred back to PrintStream.
4. The Mailing Software can access PrintStream Master File data so that only valid job and client information is used in these statements and users will not have to re-key any of this data.

Contact Information

EFI Support

US Phone:	855.334.4457 (first select option 3, then press option 8, then press option 1)
US Fax:	415.233.4157
US E-mail:	printstream.support@efi.com
Regular Service Desk hours are 8:00 AM to 7:00 PM Central Time, Monday – Friday. Outside of these hours, you may leave a voice mail message and an on-call support representative will be paged. Response time is based on the severity of the issue.	
Note	For problems involving infrastructure (i.e., computers, networks, operating systems, backup software, printers, third-party software, etc.), contact the appropriate vendor. EFI cannot support these types of issues.

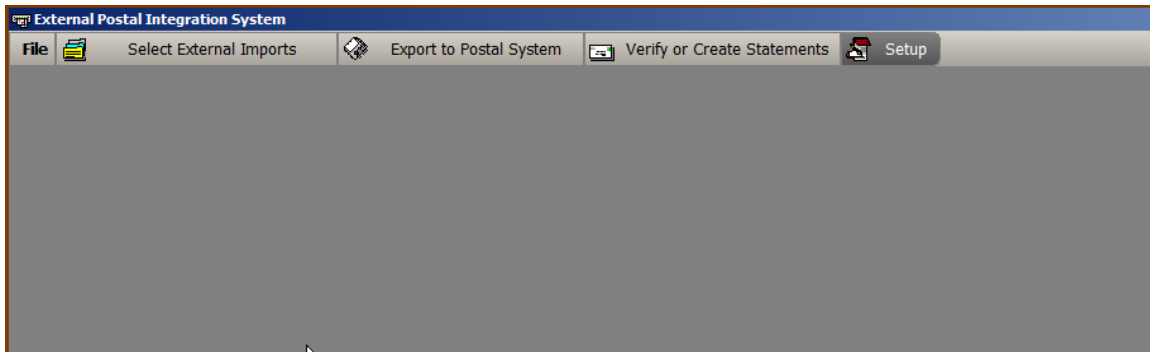
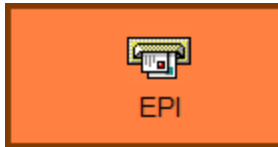
EFI Professional Services

US Phone:	651.365.5321
US Fax:	651.365.5334
E-Mail:	ProfessionalServicesOperations@efi.com
EFI Professional Services can help you perform EFI software installations, upgrades, and updates. This group can also help you implement, customize, and optimize your EFI software plus offer a range of training options.	

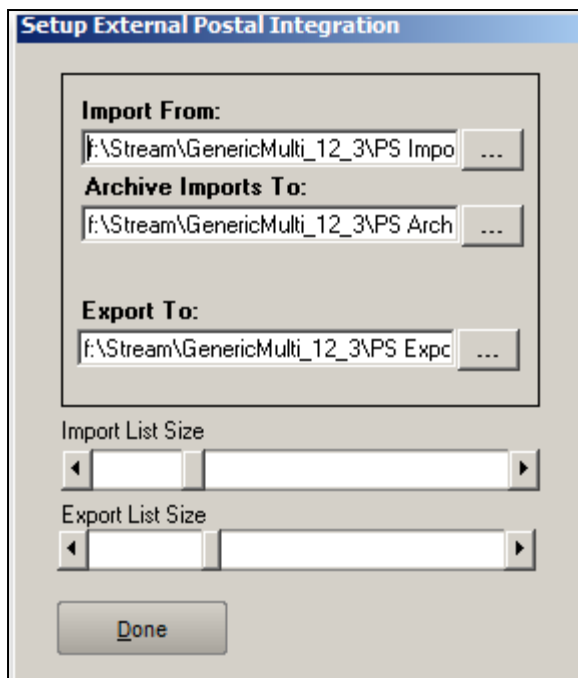
PrintStream Setup

You will have to contact your PrintStream representative to activate the EPI program. You will then go into Menus and Users to add it to the menu bar.

Click the EPI icon. Select the Setup option.



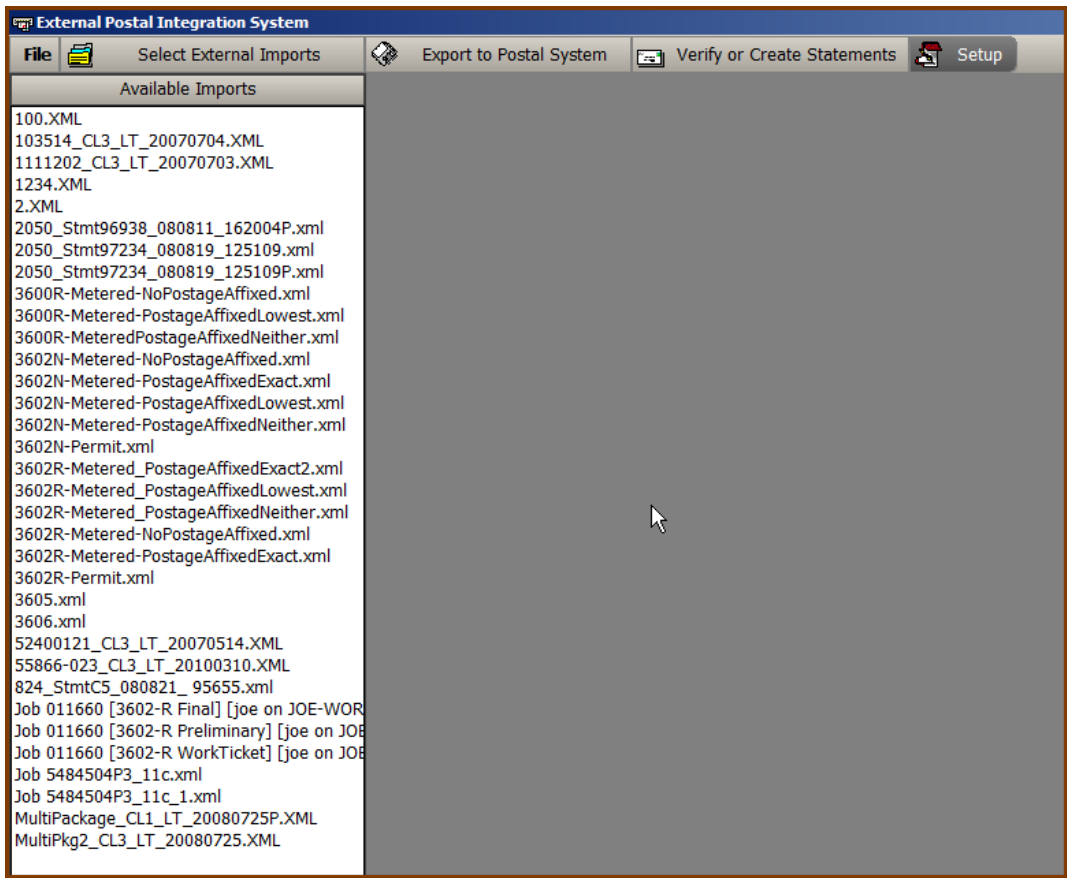
You must map the Import From, Archive Imports To, and Export To options to the import and export folders for the data going to and coming from your Windowbook product. Use the folders already defined in Windowbook. If you use the word "import" or "export" in your folder names, please do not get them confused. The sample paths in these screen shots use the import folders for sending data to PrintStream and the export folder for bringing data into the Windowbook product.



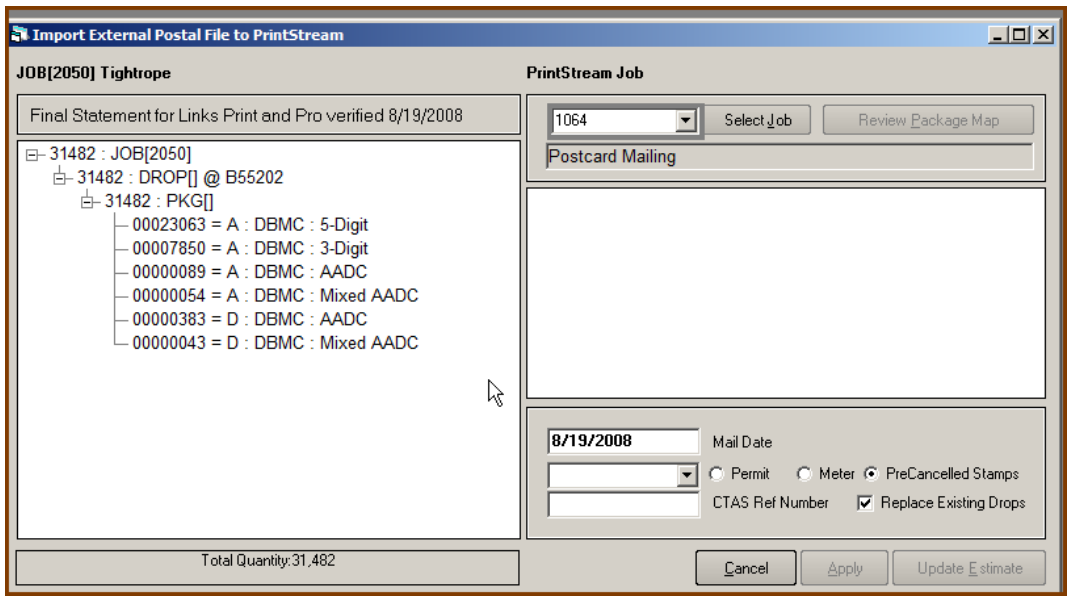
Using the PrintStream EPI Program

Select External Imports

This lists all of the XML files that are in your import folder.

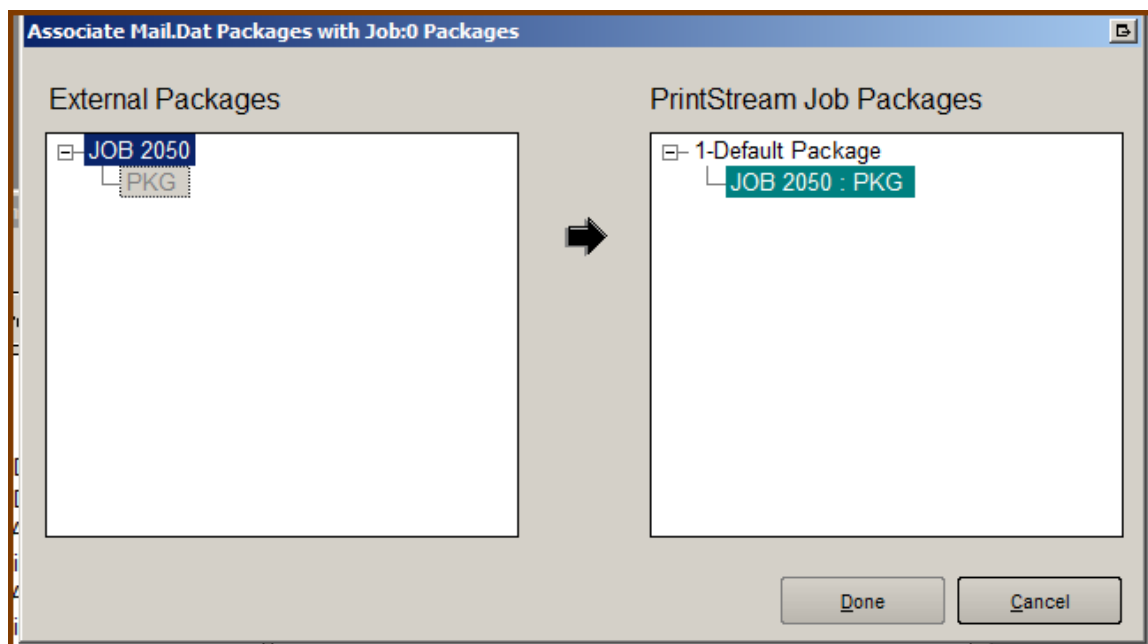
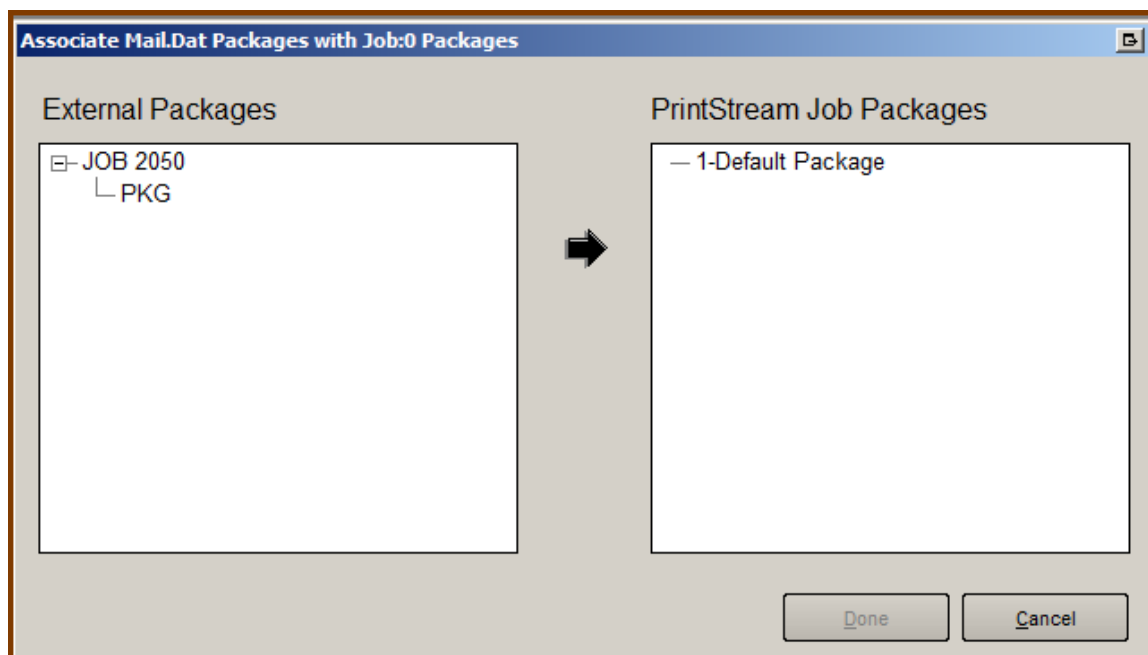


Double-click the file you wish to import. PrintStream opens the file and list the drops and packages captured in the file.

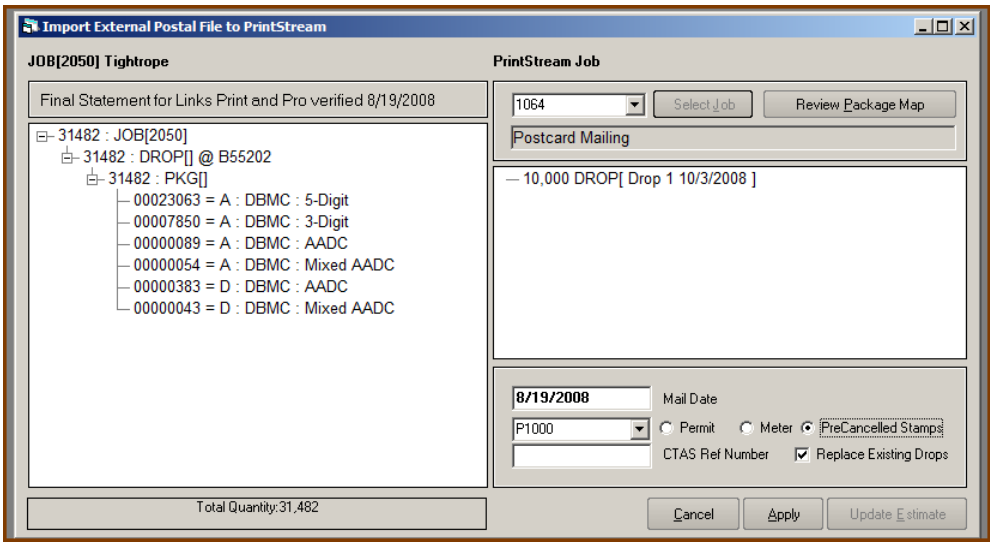


If PrintStream recognizes the job number and Permit ID included in the xml file, it populates those fields. If it does not, then you will have to fill them in manually.

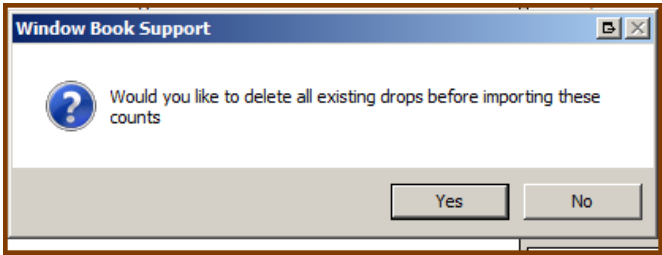
Click Select Job. PrintStream opens a new window to map the packages in the .xml file to the packages against the PrintStream job. To map the packages, drag the package on the left over to the package it applies to on the right side of the screen. Select done when finished.



Fill in a valid PrintStream postage inventory ID (if one did not populate from the xml file). Fill in the CTAS number if applicable. Select Apply when done.



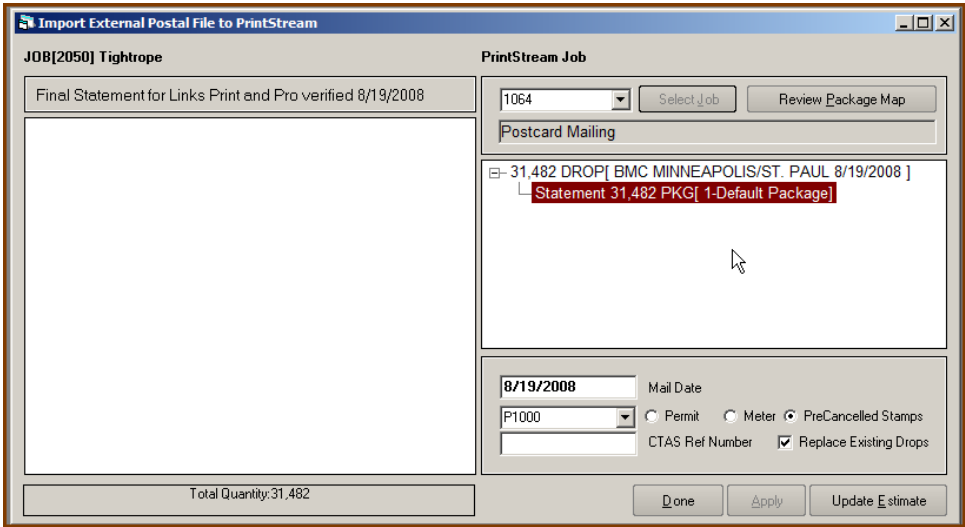
After selecting Apply, PrintStream asks the following question:



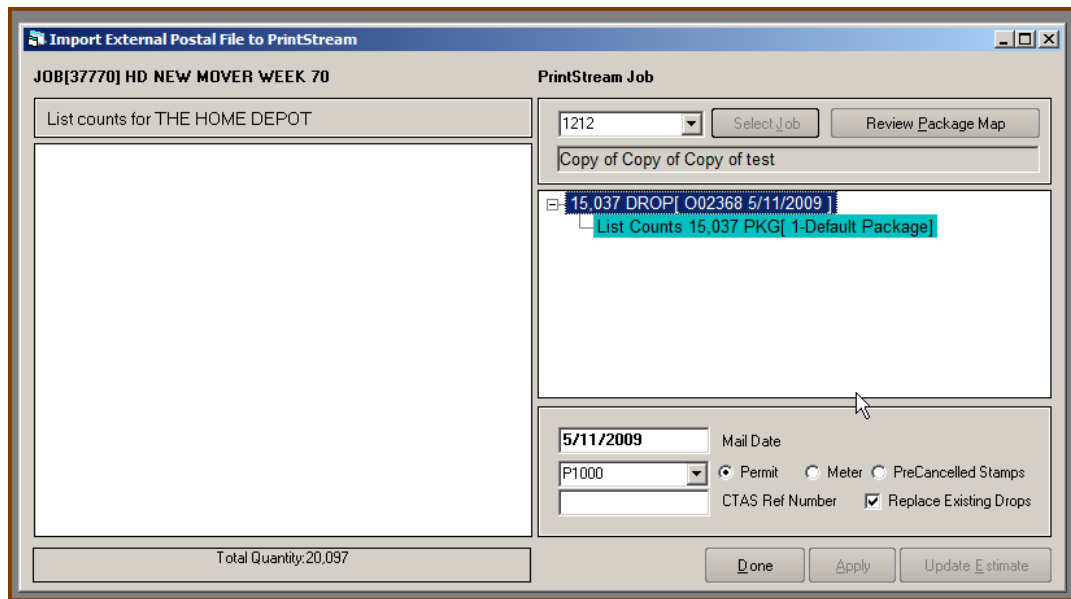
Clicking **Yes** clears all of the drops in the job before importing. Clicking **No** leaves the existing drops and appends any new drops created from this xml file to the end of the list.

If a drop has a mailing statement already assigned to it in PrintStream – the system is not able to remove that drop.

If the file imported contained Mailing Statements, then the PrintStream displays the word Statement below the drop.



If the file imported contained list counts, PrintStream displays the word List Counts below the drop.

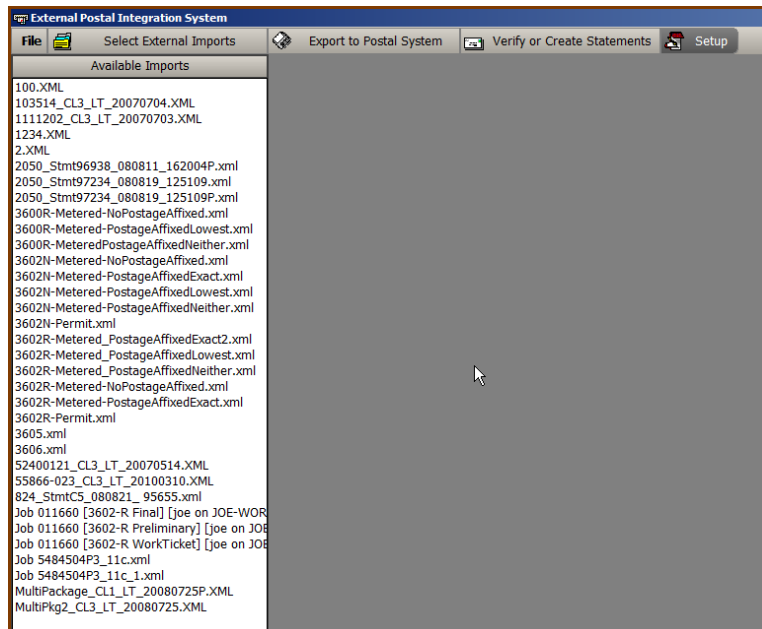


Selecting Update Estimate applies to importing list counts. This function updates the job so all packages and drops are in balance. If any processes in the job are marked quantity locked, the Update Estimate will not update the quantity for those processes.

NOTE: EPI does not support files containing postage affixed for pound mailings.

Export to Postal System

This feature allows you to take updated list counts and postal statements and send them back to Windowbook. This feature will be added to Monticello in the future.



You receive a dialog that prompts you to enter a job number and check off whether you want to export list counts or non-verified statements. If neither check box is selected, only verified statements display.

The screenshot shows a software window with the following elements:

- ☒ List Counts
- ☐ Unverified Statements
- Job Number: 1619
- ☐ Select Previously Exported Files
- Select button
- List of statements:
 - 001619 P:01 D:001:Master test
 - 001619 P:01 D:002:Master test
 - 001619 P:01 D:003:Master test
 - 001619 P:01 D:004:Master test
 - 001619 P:01 D:005:Master test
 - 001619 P:01 D:006:Master test
 - 001619 P:01 D:007:Master test
 - 001619 P:01 D:008:Master test
 - 001619 P:01 D:009:Master test
 - 001619 P:01 D:010:Master test
 - 001619 P:01 D:011:Master test
 - 001619 P:01 D:012:Master test
 - 001619 P:01 D:013:Master test
 - 001619 P:01 D:014:Master test

Verify or Create Statements

When importing postage statements into PrintStream, they display in the Postage Statement program alongside any statements that were previously created in PrintStream. You can verify those statements here as well as edit them.

You also have the option to Create and Verify statements within the EPI program, saving you the step of launching another program in PrintStream.

How the Interface Works Windowbook

List counts, drop information and statement data are exchanged between the two products using XML files at critical points in the processing of a job. For mailers creating or receiving Mail.dat files, DAT-MAIL provides powerful Mail.dat manipulation, container-level reporting and drop scheduling capabilities. In DAT-MAIL the user can define how the drops are created and can schedule the drop date for each. This data is exported as an XML file which is then imported into PrintStream at which time PrintStream package information is associated with these drops. The imported data creates drops and list counts for the job so this information can be immediately used to print Work Tickets.

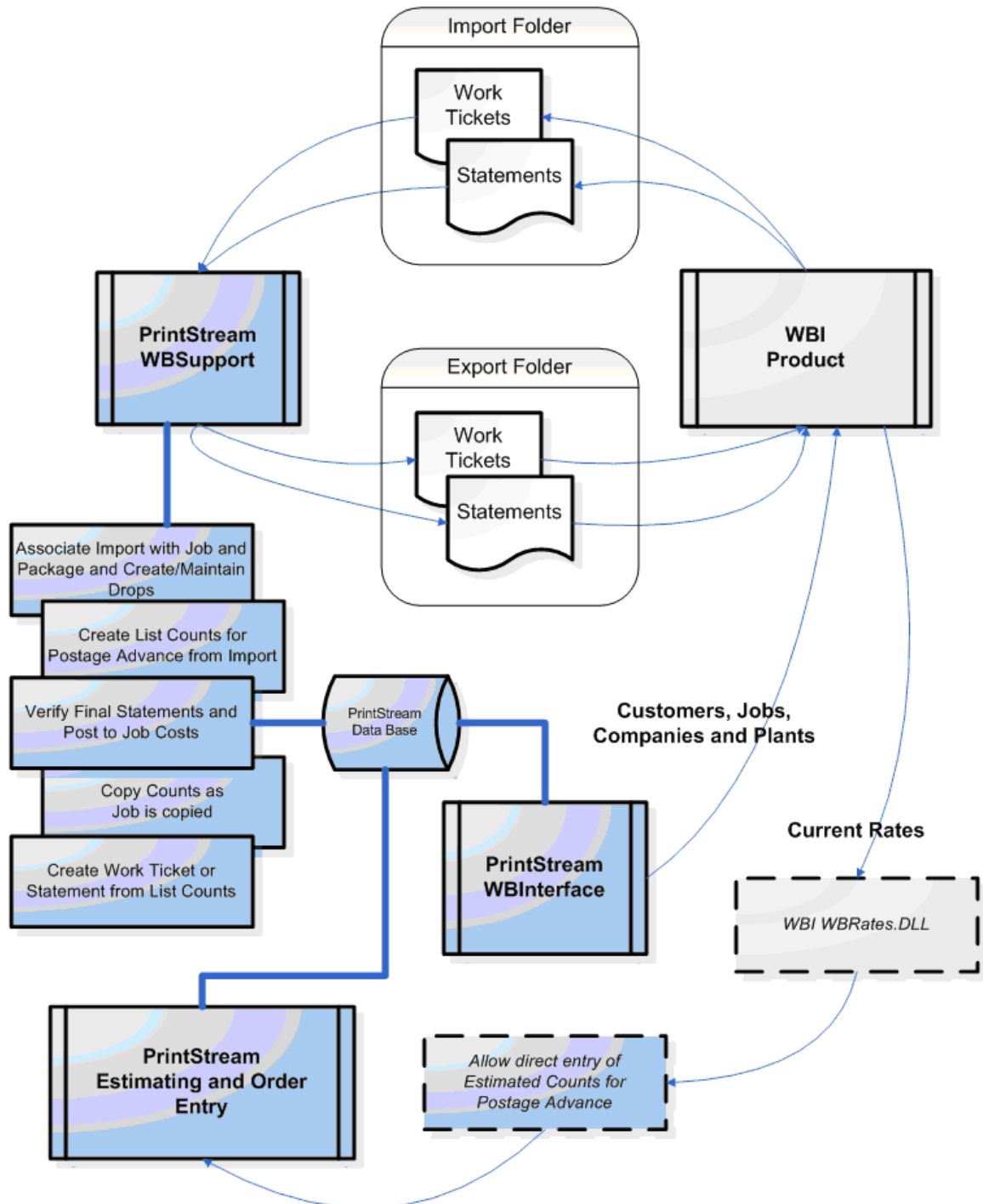
PrintStream users can modify drop and package information during production, create estimates or statements from inside of PrintStream then pass this data to the Mailing Software.

When the statement is round stamped, it can be verified in the Mailing Software then exported back to PrintStream where it can be verified or marked as verified affecting both postage accounting and inventory. Because PrintStream also maps packages during both Drop file and Statement file import, it is possible to directly create statements in the Mailing Software and import them directly into PrintStream. This provides the user with maximum flexibility in how they utilize the interface.

When creating statements manually in the Mailing Software, EPI users are able to access PrintStream job and client data directly in real-time WITHOUT an ODBC connection from both PrintStream MS SQL and Pervasive SQL versions. In the future, PrintStream will be able to access WBI's postage rates when creating estimates and list counts inside of PrintStream which will make it possible to support more mail classes and currently unsupported mailings types.

The following chart provides a visual overview of the interface:

PrintStream – WBI Interface Overview



PrintStream/EPI Interface

Setting up the PrintStream Interface in Windowbook

Registration: Obtain a new registration code from your WBI sales rep that includes the PrintStream option.

Create Transfer Folders: Create two folders on a network drive that is accessible to all PrintStream or DAT-MAIL/Post Master users. One folder will hold information transferred from PrintStream to either DAT-MAIL or Post Master, and the other folder will hold the information transferred from Post Master or DAT-MAIL to PrintStream. For the purposes of this document, we are using the \temp\PrintStream\import as the folder that will store the data exported by the WBI program and imported by PrintStream, and \temp\PrintStream\export for data going from PrintStream to the WBI folder. In addition, we will create two subfolders under the folder where PrintStream is sending its data to DAT-MAIL to store successfully imported and unsuccessfully imported statements. (See IMXML installation instructions below).

Program Setup – DAT-MAIL users need to do the setup in two places:

1. the program setup screen of the main Mail.dat program where the drop file path is defined.
2. the program setup screen of the statement printing program where the postage export is defined. Post Master users will only need to do the postage export setup.

Dat-Mail Drop Data Transfer Setup

From the DAT-MAIL File Menu, select Program Setup, and then go to the **Export/Archive** tab and select a folder to hold the transferred data you are exporting to PrintStream.

Drop Export Settings

Export Path Name: C:\Temp\printstream\import

Drop Start ID: 111

Export Format:

☒ Printstream

Dat-Mail Statement Printing and Post Master Setup

If you are using DAT-MAIL, click the **3602** button and go to the **File** menu, then select **Program Setup**. If using Post Master, go to the **File** menu and select **Program Setup**.

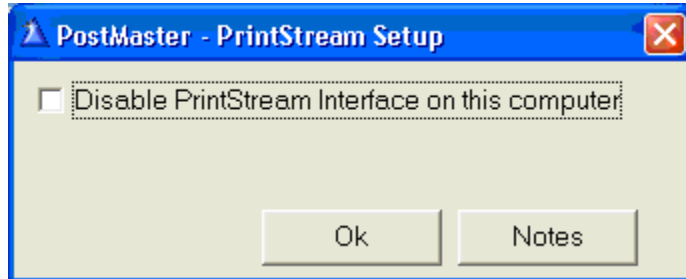
☐ Allow entry of Meter Date

External Data: PrintStream

Settings

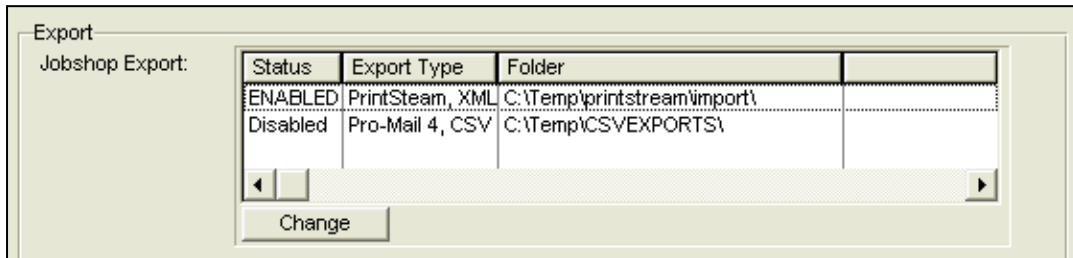
Enabling PrintStream Interface in Post Master or DAT-MAIL Statement Printing Program

Select PrintStream from the drop box. The **Settings** button only has to be pressed if you wish to disable the PrintStream interface on this workstation.



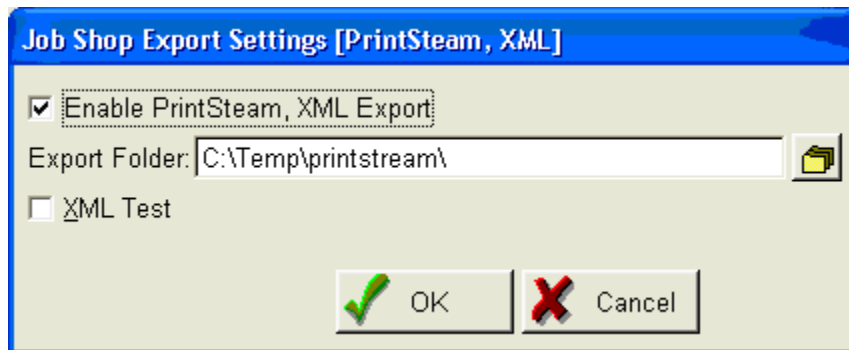
PrintStream Settings Dialog - allows disabling of interface on a single workstation

In the Program Setup Screen, go to the **Export** tab. You must enable the PrintStream Export of your finalized statement data here by highlighting the PrintStream XML line and selecting the **Change** button. For those in the process of switching from Pro-Mail 4, this interface can also be enabled so that postage usage can be exported to both systems during a transition period.



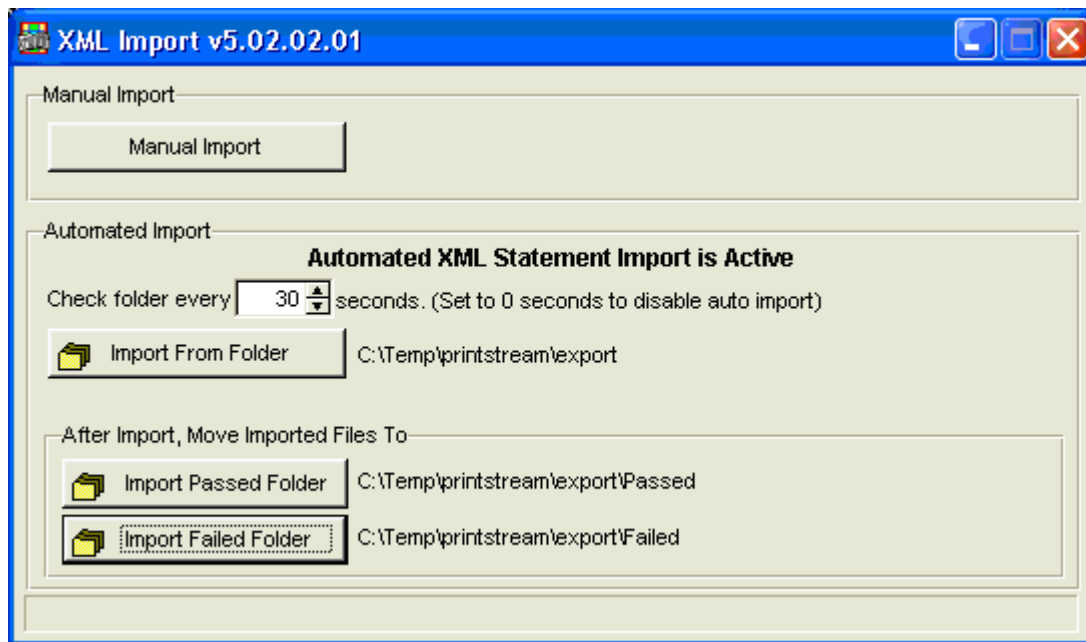
Jobshop Export Screen where postage export is defined.

Select the **Enable PrintStream, XML Export** check box and enter the path used to transfer statement data from DAT-MAIL or Post Master to PrintStream. Click the lookup button to the right of the Export Folder field to select the path you will be exporting data to PrintStream. Do not select the **XML Test** check box. This is used to generate all field tags in your XML files whether there is data to put in these fields or not. It is there for diagnostic purposes and will slow down your data export.



Jobshop Export Settings where you enable PrintStream export and define export path

IMXML Installation: IMXML is a utility that imports list count and statement data from PrintStream and creates statements in DAT-MAIL or Post Master. It should only be run on one workstation. It could also run on the server if a PSQL client has been installed though this uses up one of your PSQL connection licenses. We suggest installing this utility on the workstation using DAT-MAIL or Post Master the most. On the computer that you will be running IMXML on, run the IMXMLUtility.exe program that is located in the \wb\mdv folder for DAT-MAIL or the \wb\pmw folder for Post Master. This program will create a shortcut in your computer's Startup Program Group which will automatically launch IMXML when the computer is started. It will also put a shortcut in the Windowbook program group in your Program Menu so you can restart the program manually if it is ever shut down. After the shortcuts are installed, it will launch the program so you can set up the paths. This is the screen you will see:



IMXML Dialog with setup options

The import folder is where you will set PrintStream to export its list counts and statements. You should create two subfolders to hold the successfully imported and the unsuccessfully imported XML files. After IMXML imports the files are moved to one folder if the import was successful and another folder if the import failed. You should also set the import interval to a value between 30 and 60 seconds.

XML Drop Export Dialog Two without a valid PrintStream Job or Client displayed – press ALT-F9 then the Job lookup button to select a different job

You will see the job that was embedded in the Mail.dat header file and whatever client may be associated with that client in PrintStream. If this job does not match up with one in PrintStream, you will not see a client. If you press ALT-F9, a lookup button displays and you can select a job right from PrintStream's files and both the client and job displays. Click the lookup button and select a PrintStream job. You will see the job and client change accordingly.

Note Do not select the **Include containers in export** check box. This feature is not currently supported by PrintStream and will lengthen your export time.

XML Drop Export Dialog with a valid PrintStream Job and Client selected.

Select the **Generate Schedule** button when you are ready to export your drop schedule to PrintStream.

Setting up the PrintStream Interface in Monticello

Registration: Obtain a new registration code from your WBI sales rep that includes the PrintStream option.

Create Transfer Folders: Create two folders on a network drive that is accessible to all PrintStream or DAT-MAIL/Post Master users. One folder will hold information transferred from PrintStream to either DAT-MAIL or Post Master, and the other folder will hold the information transferred from Post Master or DAT-MAIL to PrintStream. For the purposes of this document, we are using the \temp\PrintStream\import as the folder that will store the data exported by the WBI program and imported by PrintStream, and \temp\PrintStream\export for data going from PrintStream to the WBI folder. In addition, we will create two subfolders under the folder where PrintStream is sending its data to DAT-MAIL to store successfully imported and unsuccessfully imported statements. (See IMXML installation instructions below).

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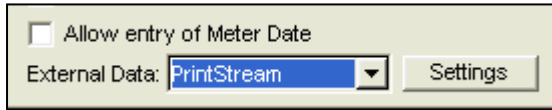
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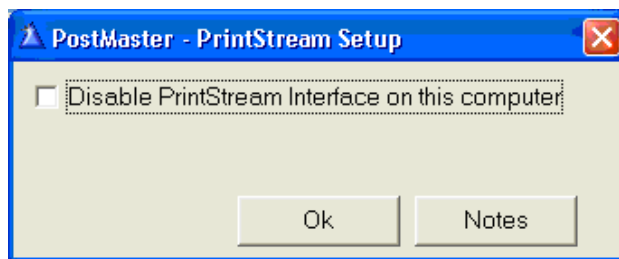
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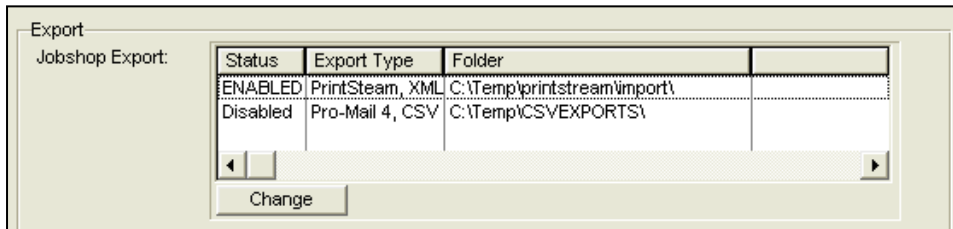
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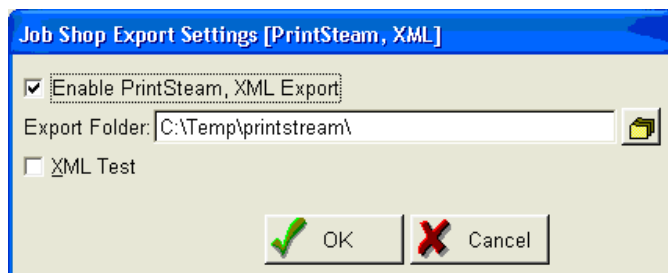
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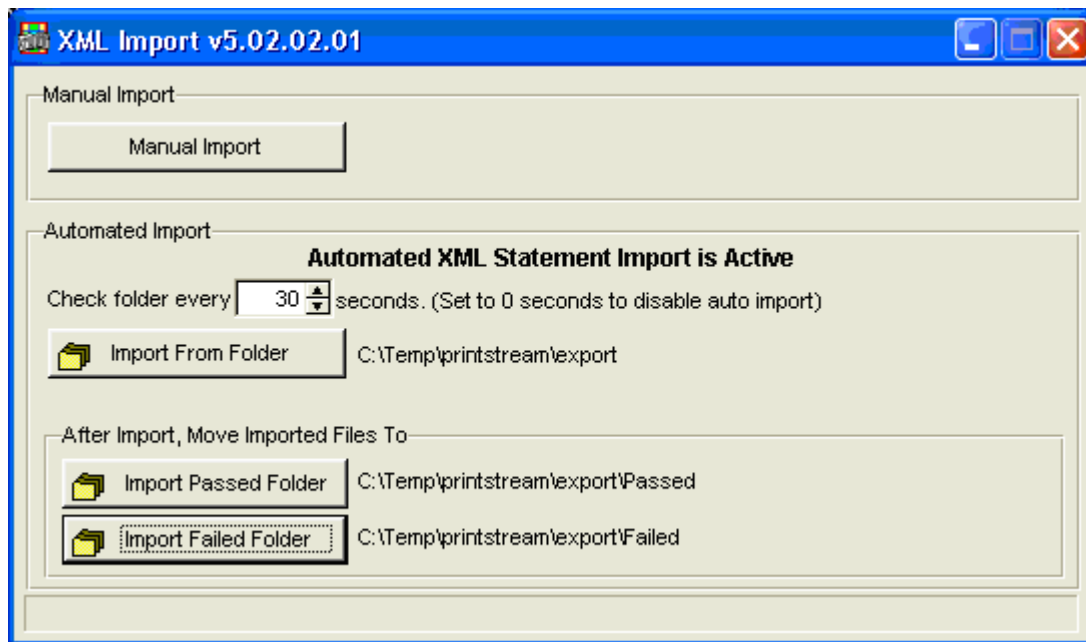
Jobshop Export Screen where postage export is defined

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Jobshop Export Settings where you enable PrintStream export and define export path

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XML Drop Export Dialog Two without a valid PrintStream Job or Client displayed – press ALT-F9 then the Job lookup button to select a different job

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Note Do not select the **Include containers in export** check box. This feature is not currently supported by PrintStream and will lengthen your export time.

Pro-Mail Information

Information

Job: 1619 [Download]

Job Description: Master test

Client: 107.5 The Eagle [Download]

Bill To Client: 107.5 The Eagle

Permit: 87654321 [Download] Rochester NH 03820

Lot:

☐ Include containers in export

3602-NV
Standard
ACF
Piece Weight: 0.0390

Generate Schedule Cancel Help

XML Drop Export Dialog with a valid PrintStream Job and Client selected.

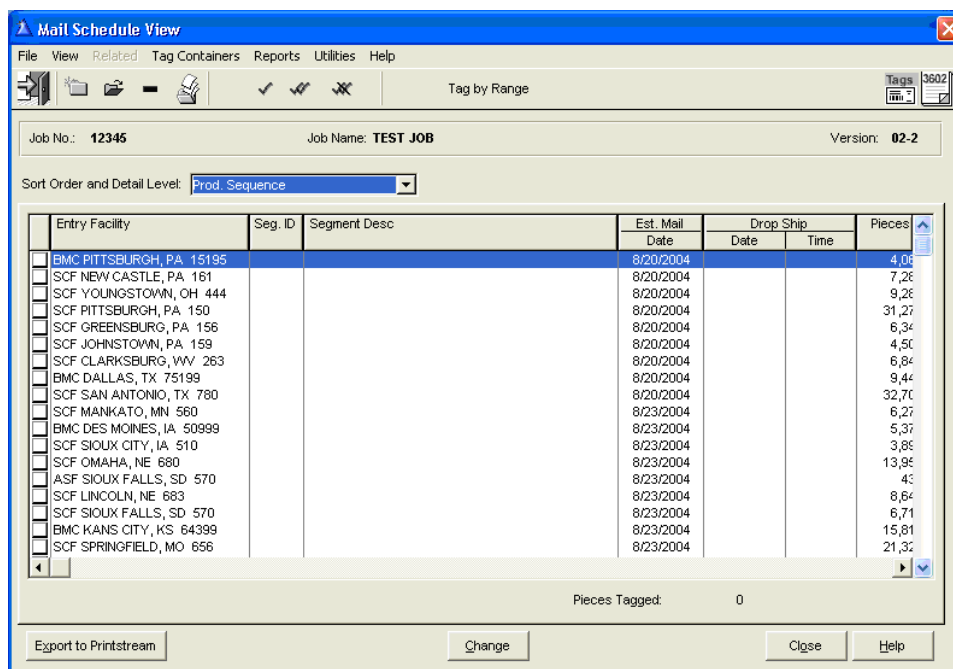
Select the **Generate Schedule** button when you are ready to export your drop schedule to PrintStream.

Creating an XML file in Windowbook

DAT-MAIL STANDARD OPERATING PROCEDURES

Import a Mail.dat file and make the necessary changes you need to the entry plan.

Schedule Drops: Go to the Mail Schedule view and choose a sortation order for your drop file. You have options to introduce segment number into the sort order and this will create a separate drop for each segment and entry point. You can select multiple drop records and change the estimated mailing date for these selected drops by just changing one of the selected records. When all drop dates have been assigned, select the **Export to PrintStream** button. A separate XML file is created for each drop date, processing category, and mail class.



Mail Schedule View - you can easily schedule mail dates and create XML drop export files for PrintStream

Sort Orders Currently Supported are:

Entry ZIP – drops are created in entry point ZIP Code sequence

Production Sequence – drops are in presort order. If you are doing your presort in far-point sequence, this will assign your drops in that order.

Segment and Entry ZIP – creates a separate drop for each segment and entry point in segment/Entry ZIP order

Segment and Production Sequence – creates a separate drop for each segment and entry point in segment and presort entry point order. Different segments can be created in Mail.dat to reflect different production runs (i.e., versions) or processing categories (i.e., letters and flats mixed in the same job).

Entry ZIP and Segment

Segment and Entry ZIP

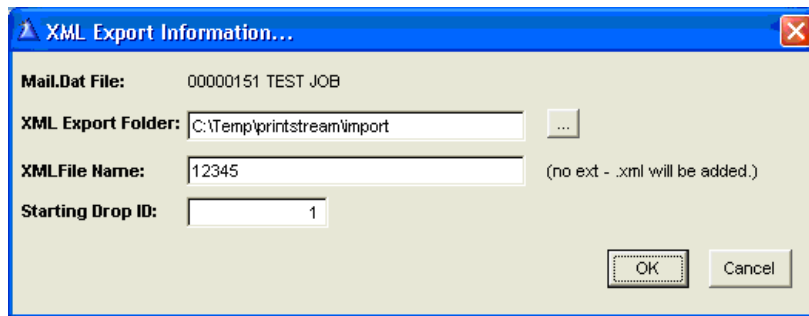
Mail Date and Entry ZIP – you can assign different mail dates to different groups of containers no matter what their entry point. This would allow you to define multiple drops even for a file that was not drop shipped!

Mail Date and Production Sequence

Mail Date and Segment

Set Starting Drop ID and Export XML Drop File

When you select the **Export to PrintStream** button, you will get the following dialog:



XML Drop Export Dialog One - Set the starting drop ID for this file.

Here you can confirm the export path and see the file name that is created. You can also control the starting drop ID that is associated with the first drop exported. You should reset this number to one when you start a new job but if you have multiple Mail.dat files associated with a single job, the drop numbers will keep incrementing across all Mail.dat files in the job so you can keep the drops separate.

XML Drop Export Dialog Two without a valid PrintStream Job or Client displayed – press ALT-F9 then the Job lookup button to select a different job

You will see the job that was embedded in the Mail.dat header file and whatever client may be associated with that client in PrintStream. If this job does not match up with the one in PrintStream, you will see no client. If you press ALT-F9, a lookup button displays and you can select a job right from PrintStream's files and both the client and job displays. Select the lookup button and select a PrintStream job. You will see the job and client change accordingly.

Note Do not select the **Include containers in export** check box. This feature is not currently supported by PrintStream and will lengthen your export time.

XML Drop Export Dialog with a valid PrintStream Job and Client selected

Select the **Generate Schedule** button when you are ready to export your drop schedule to PrintStream.

Go to the **File** menu of either **Post Master** or **DAT-MAIL's Statement Printing** program and select the **Export to PrintStream Option**. An XML file is created for each statement or consolidated statement.

Import Verified Statement Data Into PrintStream

Go to the Select Windowbook Exports option of your PrintStream Windowbook Support menu. Look for the entries that start with your job number you want to import statements for followed by STMT. Double-click and verify what you see is accurate, then select Apply and then Update.

Contact Monticello for details on the setup in Monticello.

Creating an XML file in Monticello

Contact Monticello for complete details on creating the XML file for PrintStream.

When processing the statement in Monticello you have the option to say what type of XML file you wish to create:

Final Postage Statement: This will create a statement XML file – when imported into PrintStream it will create a mailing statement.

Preliminary Postage Statement: Do not use this function

Estimate for Work Ticket: This will create a list count XML file. When imported into PrintStream it will bring list counts into the job.

3602-R (Job #0000000000)		Form 3602-R		Page 1 of 4	
<div> <div>United States Postal Service</div> <div>Postage Statement — Standard Mail</div> <div>Post Office: Note Mail Arrival Date & Time (Do Not Round Stamp)</div> </div>					
Permit Holder's Name and Address and Email Address, If Any		Telephone	Name and Address of Mailing Agent <i>(Other than permit holder)</i>	Telephone	Name and Address of Individual or
<div> <div>Statement XML Info [unfilled]</div> <div> Please provide the following information for the XML file: XML File Function ** <input checked="" type="radio"/> Final Postage Statement <input type="radio"/> Preliminary Postage Statement <input type="radio"/> Estimate for Work Ticket </div> </div>					
CAPS Cust. Ref. No.		Customer No.	Mailing Date		
Post Office of Mailing NC 280		Processing Category	Weight of a Single Piece		
Type of Postage <input checked="" type="checkbox"/> Permit Imprint <input type="checkbox"/> Precanceled Stamps <input type="checkbox"/> Internet		<input type="checkbox"/> Letters <input type="checkbox"/> CM/IM <input type="checkbox"/> First-Class <input type="checkbox"/> NM/PM <input type="checkbox"/> Periodicals <input type="checkbox"/> Parcel <input type="checkbox"/> International <input type="checkbox"/> Parcel <input type="checkbox"/> International <input type="checkbox"/> Letter <input type="checkbox"/> First-Class Bulk Mail <input type="checkbox"/> Letter <input type="checkbox"/> First-Class Bulk Mail			
Permit #		For Mail Enclosed within Another Class	Personal		
For Automation Pieces, Enter Date of Address Matching and Coding 03/17/2009		<input type="checkbox"/> Return Receipt Matter <input type="checkbox"/> Priority Mail <input type="checkbox"/> Media Mail <input type="checkbox"/> Registered Mail	For Carrier Route Pieces, Enter Date of Address Matching and Coding 03/17/2009		
Move Update method: <input type="checkbox"/> Ancillary service endorsement <input type="checkbox"/> FAS Forward <input checked="" type="checkbox"/> NCOA <input type="checkbox"/> ACS <input type="checkbox"/> Alternative method					
Parts Completed (Select all that apply)		<input type="checkbox"/> A <input checked="" type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/> E <input type="checkbox"/> F			
Price at Which Postage Affixed (Check one)		Total Paid			
<input checked="" type="checkbox"/> Correct <input type="checkbox"/> Lowest <input type="checkbox"/> Neither		p.c.s. x \$			
Additional Postage Payment (State reason)		Total Adjusted Postage			
For postage affixed add additional payment to total postage due; For permit imprint add additional payment to total postage.		Total Adjusted Postage Permit Imprint			
Postmaster: Report Total Postage in AIC 130		Total Adjusted Postage Permit Imprint			
The meter's signature certifies acceptance of liability for and agreement to pay any revenue deficiencies assessed on this mailing, subject to appeal. If an agent signs this form, the agent certifies that he or she is authorized to sign on behalf of the meter and that the meter and the mailing are in compliance with all applicable regulations. In addition, agents may be liable for any deficiencies resulting from matters within their responsibility, knowledge, or control. The meter hereby certifies that all information furnished on this form is accurate, truthful, and complete, that the mail and the supporting documentation comply with all postal standards and the mailing qualifies for the prices and fees claimed; and that the mailing does not contain any matter prohibited by law or postal regulation. I understand that anyone who furnishes false or misleading information on this form or who omits material or information requested on the form may be subject to criminal sanctions (including fines and imprisonment) and/or civil sanctions (including civil penalties).					