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Xpert Mailer
By enTechnia Software

Users Manual

Configuration and Operation

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Introduction

The Xpert Mailer is a software application that works within the MSOffice™ document and spreadsheet applications that you use on a regular basis. While it is designed to work simply, and to not interfere with your normal processes and tasks, it will reduce the amount of time that you may spend preparing your work to be delivered via a carrier such as the US Postal Service, United Parcel Service, Federal Express, Airborne or DHL.

The Xpert Mailer allows you, with a few clicks of your mouse, to produce an information sheet (called the Mailroom Order) that will allow your document to be sent to your company Mailroom, ready to be correctly packaged and sent via the carrier that you choose. You will be offered a range of carriers that your company utilizes, and the different services (Next Day, Second Day, etc...) will be presented in a manner to allow you to "pick by price" for the service your document requires.

If you have ordered any of the optional Carrier Toolsets, you can also have the option to ship the packet from your desktop. (Note in some cases this may require that you have the correct carrier Express Packaging available to expedite the sending of the item). This can save even more time in your daily tasks.

There are currently two flavors of Xpert Mailer – Solo, and Professional. Solo versions are single-user, with no Rate Discounting capability and limited reporting for users with Microsoft Access. It is designed for the infrequent sender of Express documents. Professional versions are multi-user (Networked) systems with all features enabled, including Rate Discounting and additional reports. Professional versions can support multiple users and origins* from one server on a network.

Who can use the Xpert Mailer?

The Xpert Mailer is able to be installed and used by any member of a group or company that has purchased a license or licenses for the software, and is using the Microsoft Office™ 2000/XP/2003 suite of applications that includes MSWord, MSExcel, MSAccess, and MSPowerpoint. MSOutlook will also support the Xpert Mailer functionality if you have MSWord configured to be your mail editor. Xpert Mailer is triggered by a function that is called an "Add-in", which works within the Microsoft Office™ application suite. Once you have installed the Xpert Mailer, you will notice that a new selection has been added to your menu bar to the right of "Help" which reads "Xpert Mailer". This is where you will configure your Xpert Mailer and also is one of the ways that you can begin using the application itself. The Xpert Mailer Solo package must be installed on one machine, with the Tranfinity Server component installed locally on the same machine. The Solo package does not support multiple users, or accessing the Tranfinity Server on a remote PC.

System Requirements

A PC running one of the following Windows® Operating Systems: Windows 98, Windows ME, Windows 2000 (incl. Professional & Server), or Windows XP. For multi-user versions, the Tranfinity Server component can run on Windows 98, Windows 2000 or Windows XP – it may also reside on a Windows Server 2003 machine. (Performance for multiple user versions will be best on the 2000 Server and 2003 Server OS). For more information on the Multi-user version requirements, see the Xpert Mailer Administrators Guide. The desktop machine should be configured with Microsoft Office Suite version(s) Office2000, OfficeXP, or Office2003. A minimum of 128 Mb RAM Memory is recommended with a 300 Mhz or faster Pentium/Celeron (or equivalent) processor will be required to use the Xpert Mailer with your system. To print the Mailroom Order document will require you have a Windows-compatible printer with driver software installed.

*Multiple origin locations may require optional software – please contact your dealer or enTechnia.

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Installing the Xpert Mailer

To install the Xpert Mailer, first close all open applications that are running on your computer. Place the CD in your CD-ROM or CD/DVD drive on your computer. (If this is being performed as a network installation, instead of a CD you may be provided with a network path by your Information Systems personnel). If you have a CD, the installation program will start-up automatically to this screen:
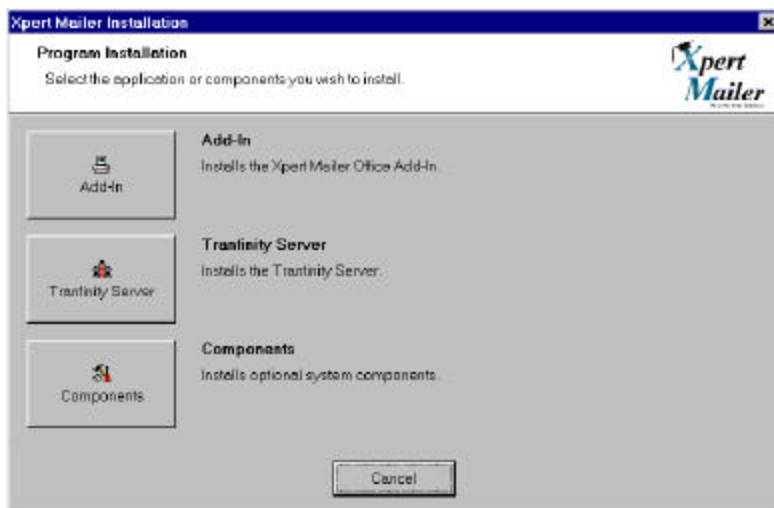
(Figure 1 – The Xpert Mailer installation screen)

Clicking on the "Add-in" button will begin the installation of the Xpert Mailer. Follow the prompts to install the software. If you have any questions about installing this software on your system, please contact your company's computer support personnel or IS department.

If you do not have a CD, then:

Click on "My Computer"
If the network drive where the installation program is located is shown as a drive available to your system, click on the drive and go to the directory path that you were provided by your IS person. If it is not, click on the blue text for "My Network Places" on the left part of the window below the "My Computer".

This will allow you to access other parts of your network. If you have difficulty with this, contact your company's computer support personnel or IS department.

Once you have located the proper drive and directory (folder):

Find the icon for Setup.exe (It looks like this:) and double-click it.

Click on the "Add-in" button on the screen in Figure 1 and the Xpert Mailer Setup program will begin (Figure 2).

Installing the Xpert Mailer Add-in:

A program called "InstallShield™" that is commonly used to install software applications on Windows-based computers performs the Xpert Mailer installation. Navigate the installation using the <Next> and <Back> buttons. The second dialog will be the Software License Agreement (Figure 2). Read the agreement, and select <Yes> if you agree. If you do not accept the agreement, select <No> and the installation procedure will stop. You will not have the Xpert Mailer functionality installed on your system.
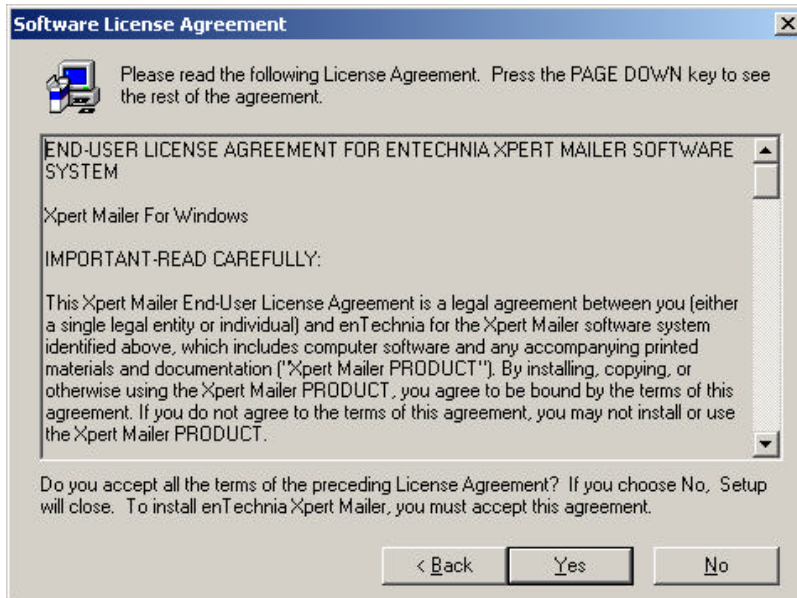

(Figure 2 – Software License Agreement)
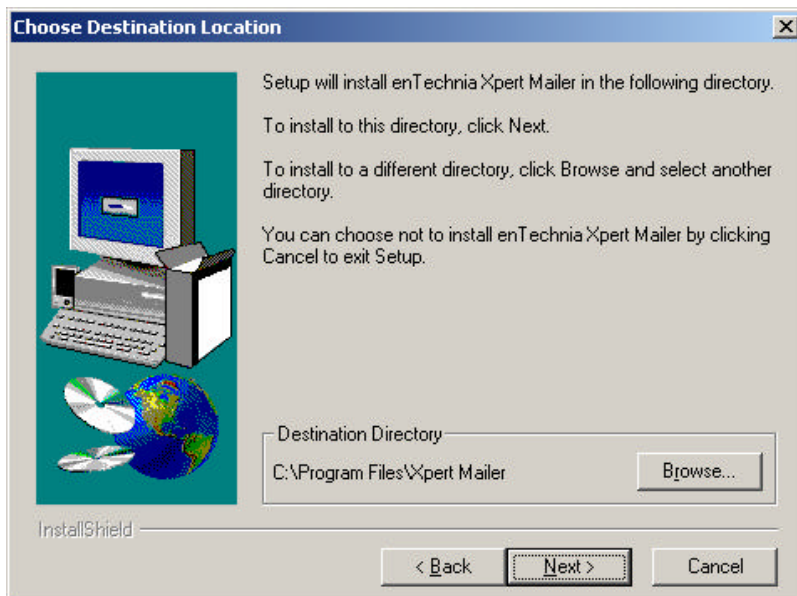
(Figure 3 – the Xpert Mailer Setup window)

You will be prompted to enter in some User information (such as Name and Company) as you move through the screens. When you reach the "Choose Destination Location" screen, you will have an option to possibly install the software in some location other than the default installation directory. For most

desktop computers, the default directory "C:\Program Files\Xpert Mailer\" should be left as is. It makes support more efficient if all the users in a company have their software installed in the same manner. Unless there is some reason to install the software in a different locale (Your IS person should notify you) please leave this directory setting alone. Click the highlighted button showing the graphic to install Xpert Mailer. If you need to change the directory, click the <Change Directory> button to get the standard Windows dialog (Figure 4) and select the drive/directory that you need to install the software.
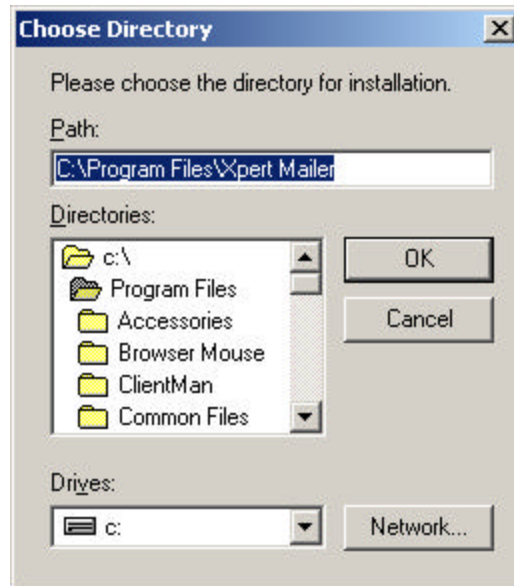
(Figure 4 – Windows "Change Directory" Dialog).

Select the new directory, and click <OK> to continue. Clicking the <Cancel> button in Figure 3 will stop the installation of Xpert Mailer. You will be shown a dialog titled "Begin Copying Files" (Figure 5) that allows you to review all of the information that you have entered, and by selecting <Next> you will install Xpert Mailer on your system.
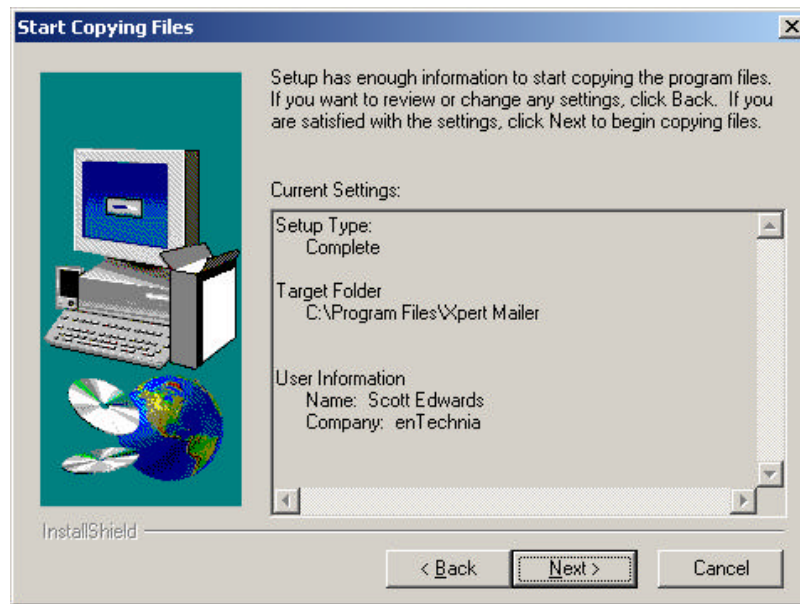
(Figure 5 - Begin Copying Files Dialog)

This process should take only a few seconds on most systems, though speed may vary. You will see a message notifying you when the installation is complete. Click <Finish>.

Installing components for use with Xpert Mailer:

Some software components or applications that are required for use with applications such as Xpert Mailer may not be installed on your computer. On the CD, we have included the additional components that you will need to run Xpert Mailer and the Tranfinity Server. The components required by Xpert Mailer are:

> Visual Basic 6.0 runtime
> Windows Script
> MSXML4
> Adobe Acrobat Reader is optional

It's likely the Visual Basic 6.0 runtime and Windows Script will already be installed by other applications on your computer. MSXML4 may or may not be installed.

In Figure 1 the bottom button is labeled "Components". Clicking this button will bring up the following screen: (Figure 6)
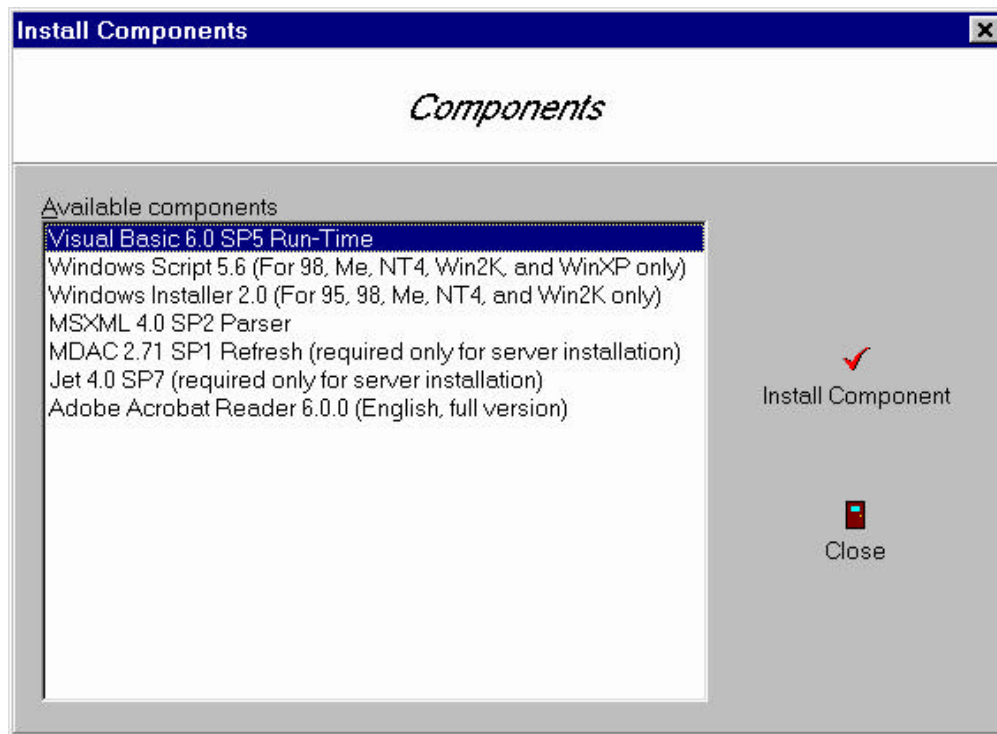

(Figure 6 - the Component installer screen)

Note that two of the items in this list are required only if you are installing the Tranfinity Server software on your computer. The other items could be required to be installed on your computer before Xpert Mailer will operate properly.

When you highlight a component from the list, and click on the "Install Component" checkmark on the right of the list, the installer will launch the install or "setup" program for the component that is selected. If the application is already installed, you may receive a message stating this, but it may not! In some cases, the installer may ask if you want to install the newer version on the enTechnia CD. If you do this, it may cause problems with other software already installed on the computer. If you are unsure of the installation, please contact your Information Systems person to request assistance.

Configuring the Xpert Mailer:

Configuring the Xpert Mailer for use with the Tranfinity Server:

The Xpert Mailer uses a simplified version of enTechnia Software's Tranfinity Server to execute (for example) the Rating and Mailroom Order document generation processes. If the Tranfinity Server has not been configured, then the Xpert Mailer will not be able to complete its tasks. An error message (Figure 7) will be displayed to the operator. If you receive an error message, check your settings and contact your company's computer support or IS person if your system will not work.
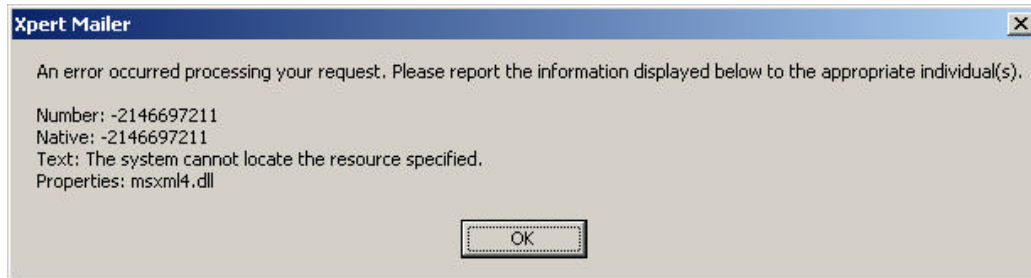

(Figure 7 – Error message)

To begin the configuration process, first start a Microsoft Office2000 application, such as MSWord. Once the application has started, select "Xpert Mailer/Settings" from the menu. The settings dialog will open.

Configuring for a "Local Host":

A "Local Host" is defined as when the software that provides the server processes is running on the same machine as the one the User is running their program on – such as MSWord. This setting is used when you have a need for only one user to access the Xpert Mailer function, or there is no network available to let the Xpert Mailer program run using only one server for many users. *(This is the only setting available for the Solo version).*

Click on the "Communications" tab and you will see the screen shown in Figure 8.
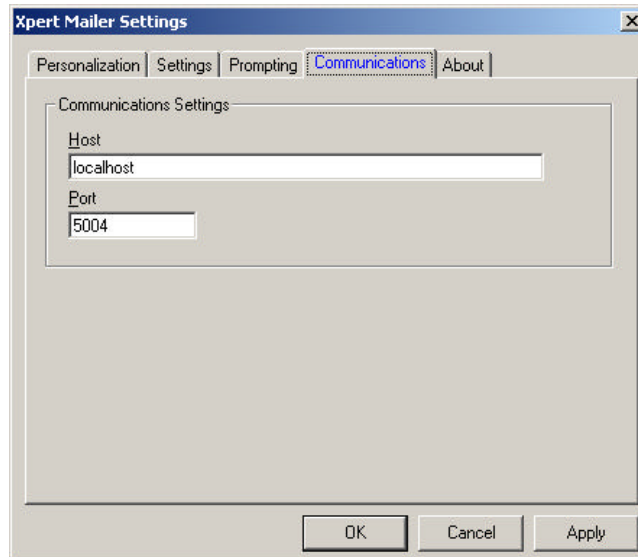
(Figure 8 – Xpert Mailer Communication Settings)

Figure 8 shows the setting that is required for a "Local Host" installation. In the "Host" field, type "localhost" in all lower-case letters (do not type the quotations). In the "Port" field, type "5004" – this is the internal data connection that the computer will make to access the server software. Click "Apply" or "OK". (Note: Clicking "OK" will close the Xpert Mailer Settings dialog, and you will have to reopen it to perform other changes or configurations.

Configuring for a "Remote Host" or network server:

This setting is not available for the Solo version. A remote host is used when the server is a separate piece of computer equipment, located on a network that is accessible by the computer that you are using. This network may be part of your company network that your system is connected to and you use every day, or it may be accessed via a dial-up or other type of remote connection. There is one set of rates and rules that are on the server, and accessed by everyone using the Xpert Mailer on the network. This is the most common use for Xpert Mailer in a larger organization, as having many copies of the rating database requires more support for a company's IS department when rates change.   For assistance with connecting your system to your network, please contact your company's computer support or IS person.

The difference between the connection that is configured for a "Remote Host" and a "Local Host" is that a Remote Host requires that the Communication Settings for Xpert Mailer has the proper I.P. address or computer name entered for the server that is running the Tranfinity Server entered into the "Host" field. An I.P. address has up to 12 numbers arranged as such: ###.###.###.### and identifies a specific computer. In some cases, the server you are required to access may have a name that could be something that you can read – like "utilities" or whatever it may have been named by your IS staff or administrator. (Often, it is some arcane non-word like "appserver" or something along this line!) Your company's computer support or IS person will provide you with the I.P. address or computer name for the server that you will access for Xpert Mailer. Enter that address or name into the "Host" field and your screen should look something like the information in Figure 9.
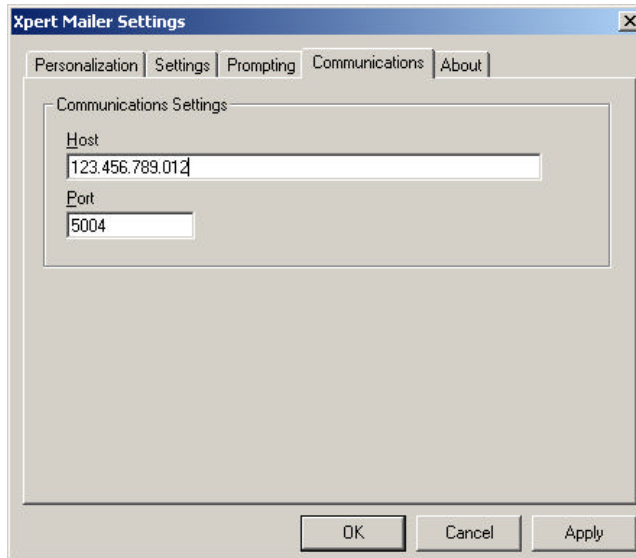
(Figure 9 – I.P Address in the "Host" field of Communications)

The default port setting for Xpert Mailer is 5004. If this should cause a conflict on the particular machine that you are using, change the port in this dialog to a port that is not being used at this address. This will need to be done for each installation of the Xpert Mailer Add-in that is installed for the users of the program.

If the server is not running on either a remote or local platform, or if the I.P. address/computer name and/or Port are incorrect, you will get the following error message (Figure 10):
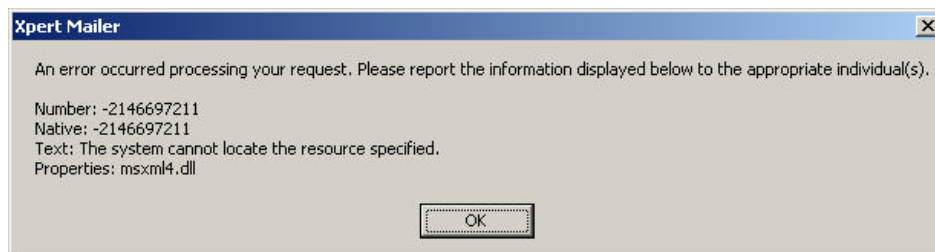
(Figure 10: Remote Server inaccessible)

Configuring the Xpert Mailer for the User:

The Xpert Mailer will require certain items of information to function properly, and to provide the user and any affiliated system(s) with the information that will be of greatest benefit. Most of this information is very self-explanatory, but other items are unique to Xpert Mailer. From your MSWord application, select "Xpert Mailer" from the Menu Bar, and then select "Settings" from the drop-down menu. You will be provided with the Xpert Mailer Settings screen at the default "Personalization" tab (Figure 11). Clicking your mouse in the "Name" field (or pressing "Alt" and the "N" keys simultaneously) will place the cursor in this field. (The "Alt" and "[Letter/Number]" function works for all of the fields on this screen with the appropriate letter or number that is underlined – this is abbreviated as "Alt+N", etc...).

(Figure 11 – Xpert Mailer Settings – Personalization)

Enter your name in the Name field, and then press the "Tab" key, or "Alt+C" to move to the "Company" field.

Enter the Company name, and press the "Tab" key, or "Alt+1" to move to the "Address 1" field.

Enter the Street Address of the company office where you work in this field, then press the "Tab" key, or "Alt+2" to move to the "Address 2" field.

IF you have a Suite number or building number, etc... enter that information in the "Address 2" field. If there is no information for this field, you may bypass it. Press the "Tab" key, or "Alt+t" to move to the "City" field.

Enter the City information for your office. Continue with the State, and Zip Code. The Zip Code must be a Zip Code that is configured on the system to allow the correct rates to be displayed. The manufacturer configures the Zip Codes. If applicable, enter the Department that you work for. Press the "Tab" key to move to the "User ID" field, and enter your User ID (provided by your System Administrator in multiple user installations – if you are not provided with a User ID – leave this field blank). If your company has more than one location, either enter the Location ID that was provided to you by your System Administrator, or click the button to the right of this field to select your location (by name) from the pop-up menu. (If you have not been given a Location ID to use, leave this field blank). Press <Enter> once all the required fields are entered and click the "Apply" button. *(Note: "User ID" and "Location ID" are not applicable to Solo installations)*

Once the data has been entered into the fields, your screen should look something like Figure 12:

(Figure 12: Personalized Settings filled out for the User)

Once the "Apply button has been clicked – you are ready to move on to "Settings" – this will allow you to configure how Xpert Mailer behaves when you use it. Click on the "Settings" tab.

Xpert Mailer Settings – "Settings" tab:

The Settings tab has three basic sections that can be seen below (Figure 13):

- Auto-Text Select – how the system selects text when you use Xpert Mailer.
- Mailroom Order – enables the system to generate a Mailroom Order sheet, and whether to print it, and optional barcode configuration.
- Screen enabling – whether or not to display certain screens to the User when processing a document with Xpert Mailer.
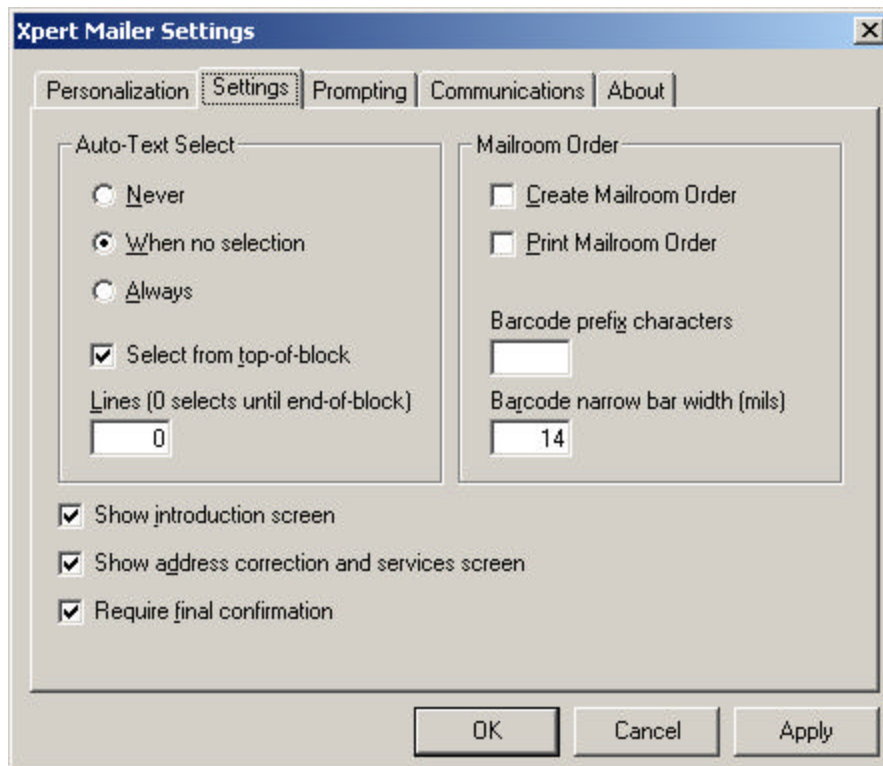
(Figure 13 – Settings tab – default)

Auto-Text Select:

This section applies to how the Xpert Mailer will handle the text in the Address Block or cells of your document when you right-click the mouse and select "Xpert Mailer" from the pop-up menu.

If the "Select from top-of-block" box is checked, the Xpert Mailer will automatically read from the top of the address block you have right-clicked in with your mouse. It will read either down the number of lines that you have specified in the "Lines" field, or read to the end of the block you right-clicked in if the value for the "Lines" field is "0".

The "Auto-Text Select options are as follows:

If the "Never" radio button is selected, then there will be no text automatically selected by Xpert Mailer when you right-click in the address block of your document. You will have to pre-select any text that you want to have utilized as a destination address to get the carrier rates you wish to compare. This setting is NOT recommended, as the Xpert Mailer will be much easier to use when one of the following selections is enabled.

If the "When no selection" radio button is selected (default setting) then Xpert Mailer uses the block of text that you have pre-selected and will use that for the address. IF there is no text that has been pre-selected, then Xpert Mailer will automatically capture text in the block that you have right-clicked in, depending on the setting of "Select from top-of-block" and the "Lines" setting. If you are using pre-selected text for Xpert Mailer to capture for getting express carrier rates, you must right-click within the text that you have selected.

"Always" is the most commonly used selection. The system will attempt to capture the address information automatically (according to the "top of block" and Lines" settings) from the block of text that you have right-clicked in with your mouse.

There are a few things that should be noted with the "format" of the address information when using Xpert Mailer: The Xpert Mailer is making an assumption that the address information is typed in a manner as it would be in an "address block" (or as you put an address on a letter) and not in a single line of text, or some other unusual format.

This means that while you can use Xpert Mailer on an address such as this:

Joe Somebody
ABC Company
1244 West Main Street   *(Xpert Mailer supports 2 lines of Street/Suite information in the address block)*
Anywhere, CA 94500

Caution: An address in a single line such as this:

"*Joe Somebody, ABC Company, 1244 West Main Street, Anywhere, CA 94500*"

Would not work with Xpert Mailer in an MSWord Document.

Also, be aware that MSWord "wraps" text when it hits the margins of the page, and that information that is displayed as multiple lines on the document may really only be one line of data, much as this paragraph is. Xpert Mailer and other tools that capture information from MSWord documents usually require what is known as a "Carriage-Return/Line Feed" between each line of text. Don't worry about this - it happens automatically when you press the <Enter> key on your keyboard.

Creating or Printing the Mailroom Order:

The next section addresses the creation or printing of the "Mailroom Order" document. This document can allow you to send your document, with the Mailroom Order attached, directly to the mailroom so that the Mail Clerk or Administrative person there can process it correctly. Because the Mailroom Order has all of the information required to instruct someone to properly process your document, there is no need for you to keep all of the different carrier Express Envelopes or packaging at your desk.

There are four fields in the Mailroom Order settings, but in reality only two of them will affect the user. The first field is the "Create Mailroom Order" checkbox. This instructs the Xpert Mailer to execute a process that creates the Mailroom Order as a Word document in the background (other than a few seconds delay – you will not observe anything happening).

The "Print Mailroom Order" checkbox will instruct the Xpert Mailer to then drive this document to your default Windows printer – again as a background process. If you are part of a group of users that shares a networked printer, there are a few things that you may want to consider when processing a document and using Xpert Mailer:

With a network printer, sometimes you will have to wait for your document while someone else is printing theirs, or you may print two documents and find that someone else's print job "snuck in between" the two documents that you printed. Because of this, we suggest that when using Xpert Mailer and your default printer is a networked printer, you first print your main document and immediately use Xpert Mailer to compare rates and then generate the Mailroom Order. This reduces the chance that you will have another print job between the two documents, and also if there should be any gap between your print jobs, you can compare the addresses between your document and the Mailroom Order to ensure that it is YOUR Mailroom Order and the destination address matches your main document. If you are fortunate enough to have your own printer, then these issues need not worry you.

If you want to create the Mailroom Order, but not print it automatically, then the Xpert Mailer will generate this document and place it in the Xpert Mailer directory on your PC. (In most cases, this will be on the C: drive, but it may be another drive letter designation, depending on your computer). We will use "C:\Xpert Mailer\LastMailroomOrder.doc" for this example. **NOTE:** This document is overwritten by Xpert Mailer each time you create a new Mailroom Order, so if you wish to save it for some reason, then immediately after you have created the Mailroom Order, go to "C:\Xpert Mailer\ LastMailroomOrder.doc" and save it with another name – preferably in a directory that you normally work in, and perhaps the same one that your main document is being saved in. You may even want to save it as a similar name as the main document, with "MO" either appended or suffixed to the name, so that it is easy to locate when you are searching for it. The method for this is entirely up to you, or your company policy. These are just suggestions in the event that you do not print the Mailroom Order automatically.

The other two fields in this section have to do with the barcode that is printed on the Mailroom Order. Check with your supervisor, company computer support person or IS Department before changing the value(s) in these fields.

> The "Barcode prefix characters" field exists to place a character in the front of the numbers that are encoded into the barcode on the Mailroom Order. Some companies have integrated shipping systems in their mailrooms that already communicate with accounting systems, or other software. These often use a barcode or number to initiate the data exchange with the other system. By placing a specific character in the barcode, this communication can be modified to allow the system to capture the Address and Shipment Method data from the Xpert Mailer database instead of another system that it may communicate with for shipping.

> The "Barcode narrow bar width (mils)" field simply instructs the Xpert Mailer what size to print the barcode on the Mailroom Order. Some printers may have trouble imaging some barcode sizes, so this value can be changed from the default "14" to a "12" if your printer is printing a barcode that cannot be scanned by the Mailroom, if they use a barcode scanner for processing. Most printers will work fine with the default setting of "14" for this field. Human-readable text always prints below the barcode on the Mailroom Order.

Screen enabling:

There are three different "optional" screens that may be displayed when the Xpert Mailer processes a transaction. None of them are required, but at least two of them are commonly used in most offices. The three screens are the "introduction screen", the "Address correction and services" screen, and the "Require final confirmation" screen.

"Show introduction screen"
The first time that you use Xpert Mailer (unless you have already unchecked the field for "Show introduction screen") you will be shown the screen below (Figure 14). This screen is to be used more as an introduction to Xpert Mailer and not used after the first time. Checking the "Skip this screen in the future" box will disable this screen in the future

This screen can be disabled from the Settings screen (Figure 13) by un-checking the "Show introduction screen" checkbox – the top checkbox in the lower left corner of the "Settings" screen.
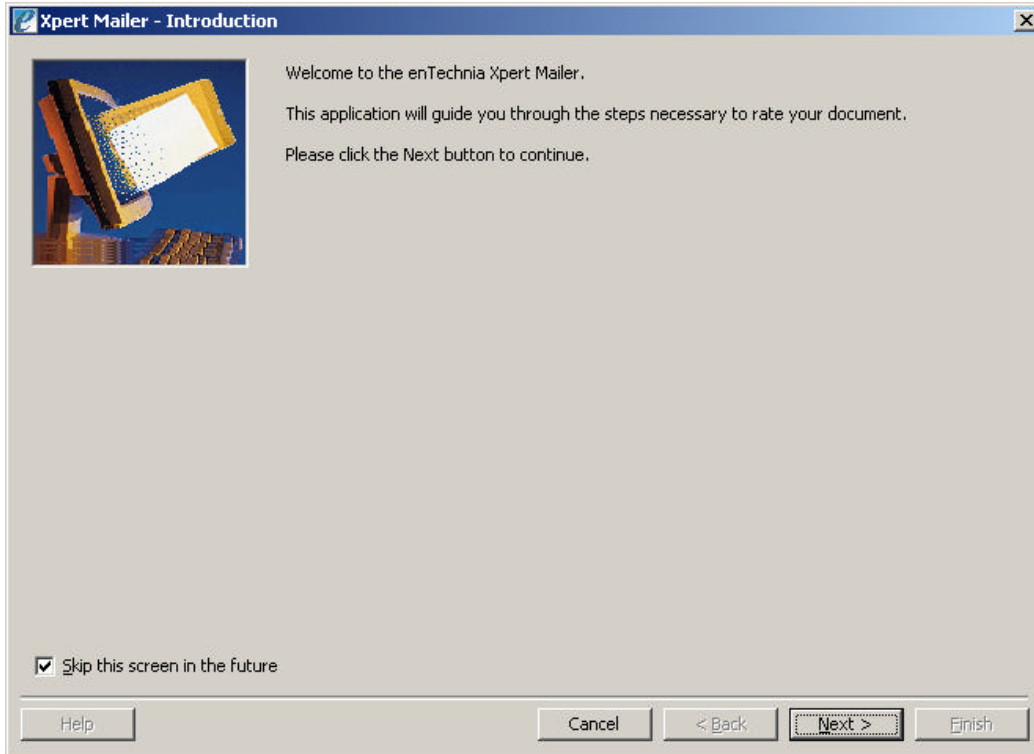
(Figure 14 – Introduction screen)

"Show address correction and services"

This screen is a commonly used screen if your company sends out any documents that require a special service with the carrier – such as Insurance (Declared Value), or Delivery Confirmation. Also, this screen (Figure 15) offers data fields for the entry of additional information, such as Client/Matter, Escrow, Policy or Claim data, etc… Two of them are shown in the example below. If your company or processes do not require any of this information, then this screen can be disabled by un-checking the checkbox for "Show address correction and services screen".
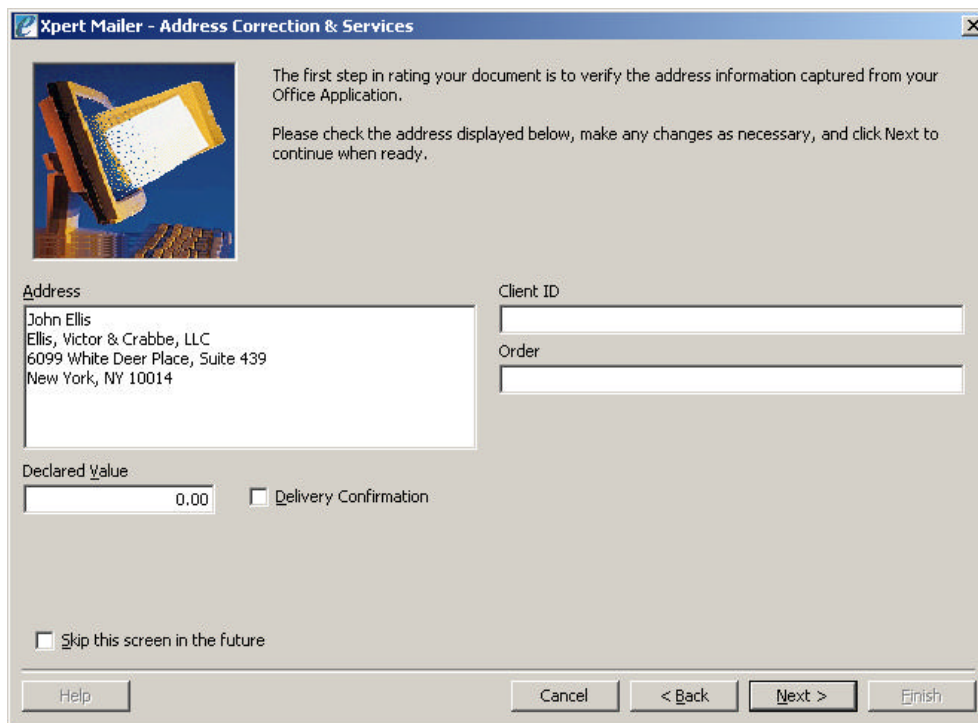
(Figure 15 – Address Correction and Services screen)

"Require final confirmation"

This screen exists to inform you that the entire process of generating an Xpert Mailer transaction is complete. It can be useful in situations where a network is notoriously slow, or if there are problems with network printers. This screen is not displayed until the Xpert Mailer database has been updated, and any Mailroom Order document has been generated. In most cases, this screen is not necessary and if it is deactivated, it will reduce your operation by a keystroke or mouse-click. Un-checking the "Don't show this dialog in the future" box (Figure 16) will prevent this screen from being displayed at the end of your Xpert Mailer transaction.
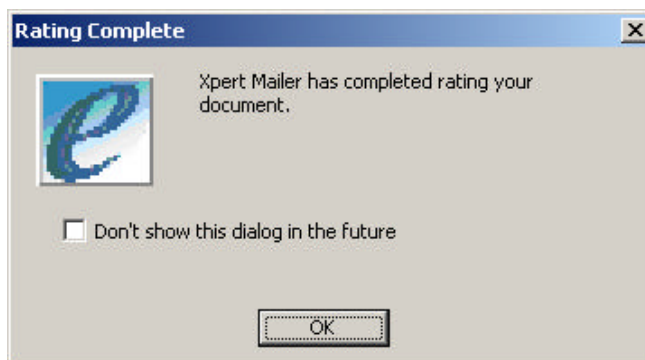
(Figure 16 – Final confirmation screen

The default for the Final confirmation screen has a small check box in the lower left corner that is checked "Skip this screen in the future". If you want this screen to show in the future, click your mouse in the checkbox to uncheck it and the screen will appear until you recheck this box.

The Address Correction and Services screen has varying uses, depending on the needs of your business. In the graphic in Figure 15, you will see that there is an "Address" field that shows the name and address information of the recipient. This is a default field that will always be displayed on this screen. Also, there is a "Declared Value" field and a "Delivery Confirmation" field that are also default fields for this screen. Figure 15 shows two additional fields to the right of the Address field, which are labeled "Client ID" and "Matter #". These fields are user-configurable to allow additional data to be captured with the transaction. If there is no requirement to capture additional data with an Xpert Mailer transaction, then the screen can be disabled by either checking the "Skip this screen in the future" box or by turning it off on the "Settings" screen of the Xpert Mailer Settings (Figure 13).

Putting a value for the document or packet in the "Declared Value" field will have the Xpert Mailer consider the value of the item for insurance purposes when rating the packet or envelope with the carrier. Not all values will be rated depending on whether or not it "triggers" the value for the carrier to insure the item (or exceeds the maximum that they will insure for), and the insurance rate for the carriers can vary.

Checking the "Delivery Confirmation" box will enable any applicable service (and possible charge) to have the carrier provide a service that allows you to be informed when the item was delivered. This service and any associated fee will vary by carrier and is not available from all carriers for all service levels.

Please view the carrier information for the carrier(s) that you use at your company to get a better understanding of the services they offer and the fees that are associated with their services and options.

Depending on how your business operates and its needs may determine how your screens will be enabled. If your IS or Operations Management have not determined how they wish for the screen to be displayed, you hopefully will have found this section useful in setting up the way you use Xpert Mailer.

Configuring the Xpert Mailer field names & prompts:

As you read in the previous section, the Address Correction and Services screen (Figure 15) has some additional information that can be captured with each transaction. There are actually a number of additional fields that can be enabled on this screen for the acquisition of data when processing a document on Xpert Mailer. This section will cover how to enable or disable these fields, and whether or not to make the data entry a requirement to processing.

On your Office2000 menu bar, select "Xpert Mailer" and "Settings" from the drop-down menu. Click on the "Prompting" tab and you will see the default settings for prompting (Figure 17).

(Figure 17 – Prompting Settings screen)

The settings in the screen as defaulted when Xpert Mailer is installed, will provide the fields that are displayed in the Address Correction and Services screen (Figure 15). By default, the Client ID is enabled, and Auxiliary Field 1 is enabled, (and also labeled "Matter #"). These are two particularly common fields in legal offices, which are common users of this product.

Reading across the Prompt field settings, there are four options for the configuration of each field:

The first checkbox, on the left column is the enabling checkbox. If you check the box, then the field will be displayed on the Address Correction and Services screen. If it is unchecked, it will not be displayed.

The next field is the "Label" field. This is user-configurable to read whatever you may want to name the field prompt. Even though the first two fields are already "named" (Client ID and Order ID) you can change the name(s) of the Label for your own use if these do not fit your needs.

The 3rd setting is for the length of the field data. Default is 40 characters, which is the maximum number of characters that can be held in the fields. If you have no need for this many characters, you can shorten the fields to the length that best fits your needs.

The fourth setting is the "Required" checkbox. If the checkbox for an enabled field is checked "Required", then the data must be entered into the field before Xpert Mailer will allow you to continue past the Address Correction and Services screen.

Example: Adding a field to the Address Correction and Services screen

In this example, we will add a field to the Address Correction and Services screen. For a Law Office that is handling many customers, matters and in some situations, multiple cases for each matter, the default fields may not be enough. We will add a "Case #" field to the prompts. We will also make the 3 fields required data, so the system must have the data entry performed before moving on.

Open this screen in Xpert Mailer (Xpert Mailer/Settings/Prompts tab) until you see the screen in Figure 18. Now modify the "Aux 2" field (the fourth field down). Check the box to enable "Aux 2". Name the Label for "Aux 2" by typing "Case #" into the Label field. Press the {tab} key once and the cursor will move to the "Length" field. Press the {delete} key twice and type "8". Check the "Required" box for this field. Also, check the "Required" boxes for the Client ID field and the Aux 1 field. Your screen should look like the screen in Figure 18:
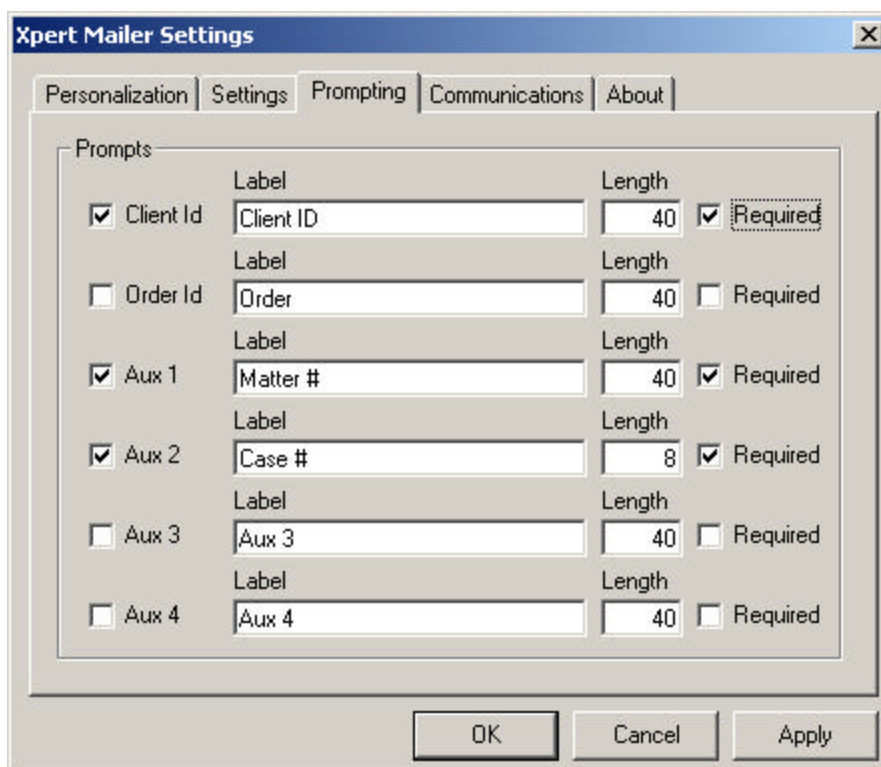
(Figure 18 – Prompting Settings with Case # added)

Now click "Apply" and then click "OK". You have changed your settings for the Xpert Mailer Address Correction and Services screen. Time to test it! Open a new Word document and type an address - you can use:

Joe Smith
ABC Company
1241 West Main Street
San Diego, CA 92101

Or any other address you want.

When you have finished typing, right-click your mouse in the address block (anywhere in the 3 or 4 lines of the address that you just typed) and select "Xpert Mailer" from the menu that pops up from your cursor. When you get to the Address Correction and Services screen, it should now appear like the screen below (Figure 19):

(Figure 19 - Address Correction and Services screen with "Case #" field prompt added)

Without entering any data into any of the three additional fields, click the <Next> button. You should receive an error message in a small window that will appear (Figure 20):
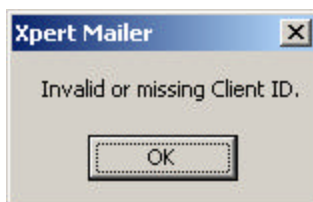
(Figure 20 – "Empty field" message for Client ID)

If any of the three fields that are configured as "Required" fields were to be left empty, a similar message would appear for each of them – but only one message will appear per each required field that needs filling. (i.e.; If both Client ID and Matter # are required, and the Client ID field is empty, the system will only notify you of the empty Client ID field until you fill it. If the Matter # is also left empty – the system will message you separately on that field after you have filled the Client # field and clicked <Next> without filling the Matter # Field). After clicking <OK> in the error message, you will be returned to the screen in Figure 19.

Enter data into each field (Client ID, Matter #, and Case #) in the Address Correction and Services screen. Now click <Next> and you will see the rate shopping screen (Figure 21).
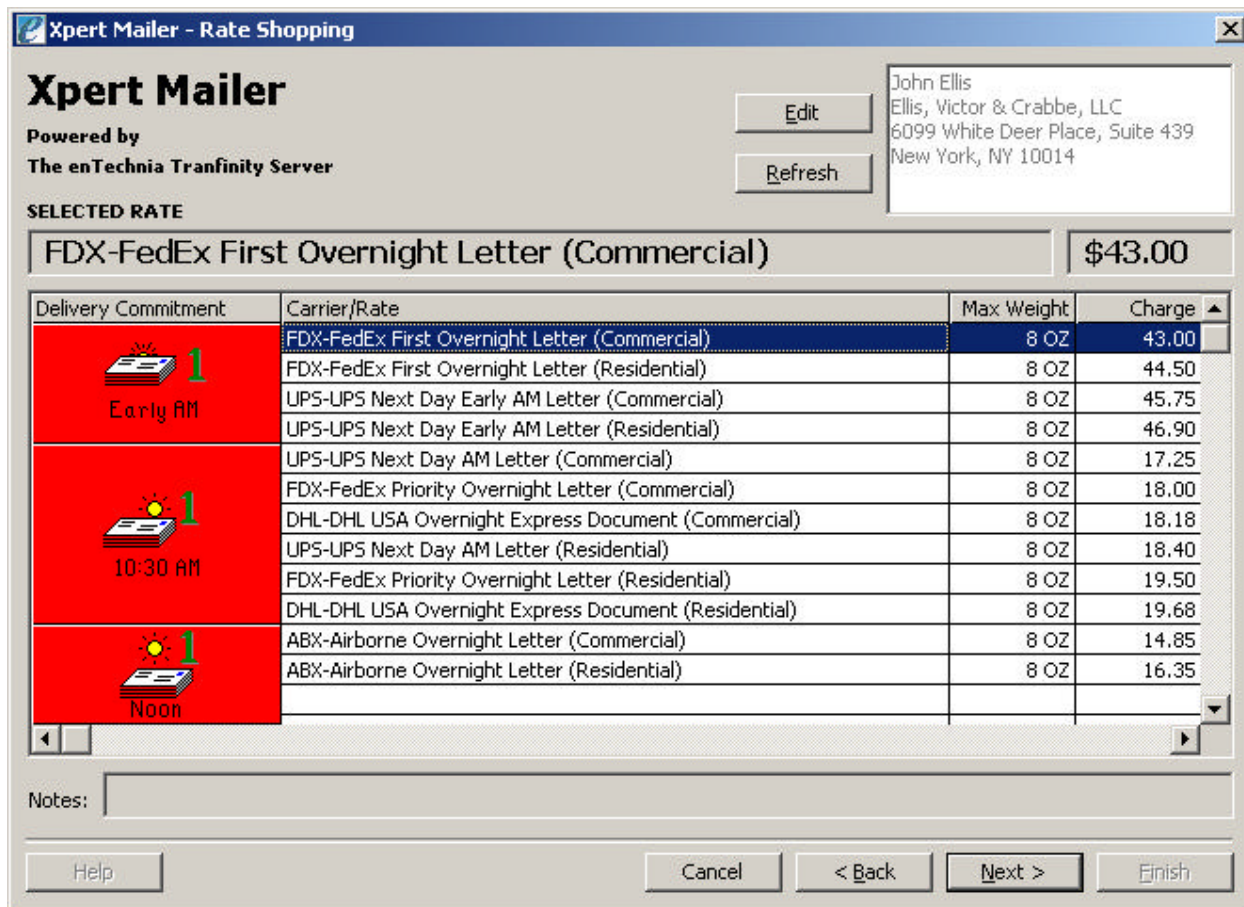
(Figure 21 – the Xpert Mailer Rate Shopping screen)

The Rate Shopping screen is the heart of the information that is provided to the user by Xpert Mailer. It shows the different rates and carriers for the services that are enabled in Xpert Mailer to be compared. This screen shows the destination name and address information in the upper right-hand corner. There are two buttons next to the address field – <Edit> that allow editing of the address, and <Refresh> that will have the system re-rate against any changes in the destination address.

Using the Xpert Mailer (Common Example):

In most cases, using the Xpert Mailer in day-to-day activity will be fairly simple and can be broken down into four steps:

- Right-click in the address block and select Xpert Mailer from the pop-up menu.

- Select special services (if any) and enter additional data into the prompt fields.

- Select a carrier and rate for the document.

- Print the Mailroom Order document.

Once the parameters are established as to how your business requires Xpert Mailer to operate, it becomes a simple, repeatable function that you can do in a matter of seconds. The main idea behind the Xpert Mailer is to save time preparing Express Carrier documents, help select the best value to get the document to it's destination with the carrier(s) that your company uses, and be able to ensure that the charges incurred can be accounted for to the department that is responsible for them.

Each time that you use the Xpert Mailer, you will be able to save time and money, and reduce errors in the mailing process.

The example on the following pages shows Xpert Mailer being used in the configuration that was shown in the prior configuration, with a Client ID being a "required" field, and an "Order #" being an optional field that is prompted for.
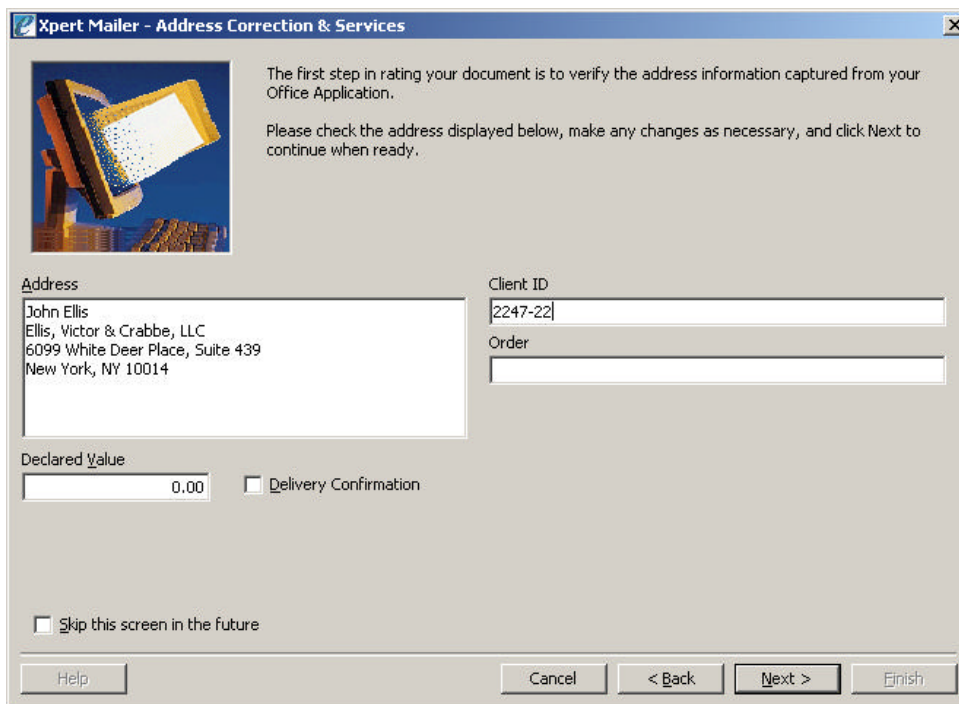
Processing with Xpert Mailer:

First, right-click with your mouse in the address of the letter or document that you are sending
(Figure 22)
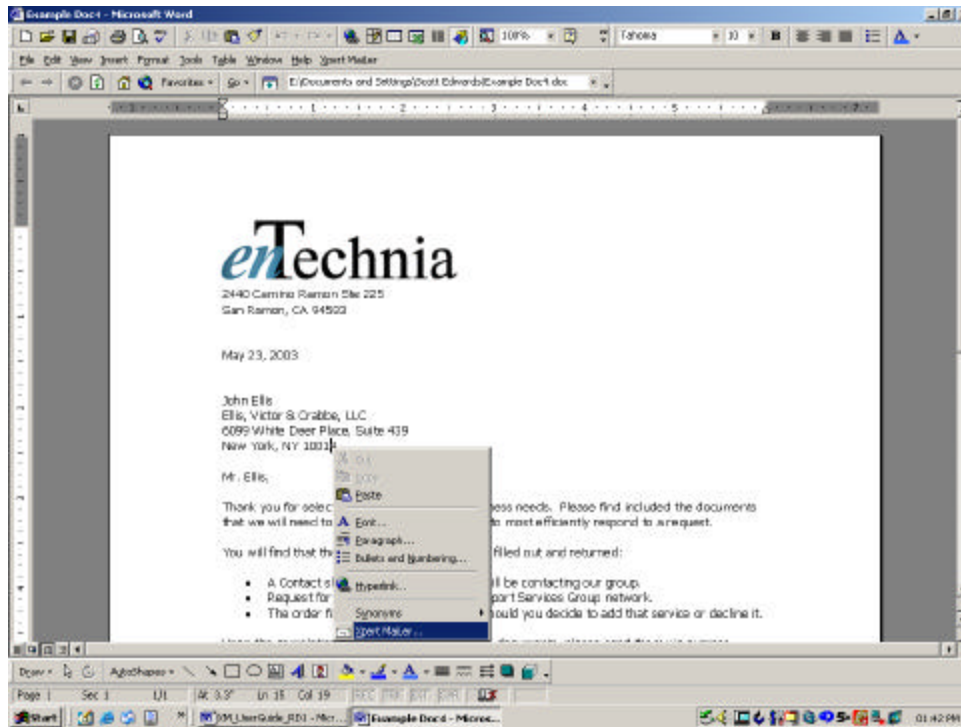
(Figure 22 - Right-click menu in a Word Document)

Select "Xpert Mailer" from the bottom of the menu, and the address block will be selected, and you will be displayed the screen in Figure 23 – the Address Correction & Services screen.

(Figure 23 - Address Correction & Services screen)

Click the <Next> button and you will be displayed the fees for the carriers and delivery rates that are enabled on your system. (Figure 24 – Note: your rates and service selections will likely be different from the rates shown in this example)

(Figure 24 - Rate Shopping screen)

Select the rate for the delivery commitment that you require for the document. Scroll as needed to display all the rates. Then click the <Next> button to see the "Verify Selection" screen (Figure 25).
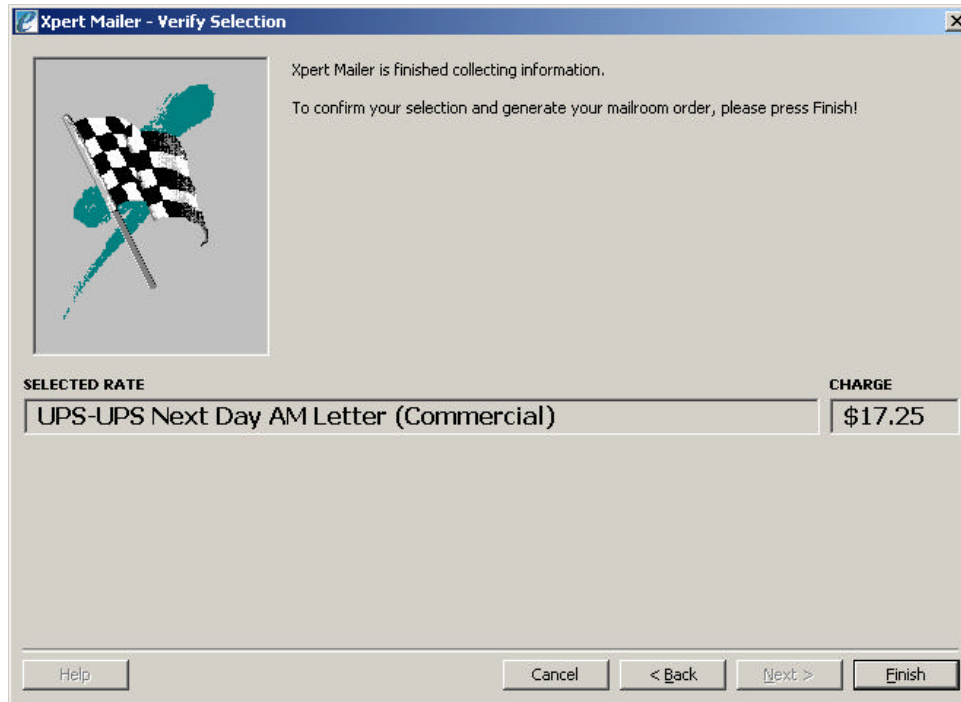
(Figure 25 - Verify Selection screen)

Clicking the <Finish> button in the Verify Selection screen will then create (and if configured so, also print on your default Windows printer) the Mailroom Order (Figure 26) for your transaction. Include this page with your document when you send it to the mail processing area or shipping room.

(Figure 26 – Mailroom Order page).

You have just completed an Xpert Mailer transaction! Congratulations. We hope that you will find our application a useful and timesaving tool within your business!

Contacting us:

For more information on other enTechnia products and services as well as optional modules for the Xpert Mailer, please contact enTechnia at (925) 866-4199 (Ext 2) or check us out on the web at: www.entechnia.com

For Support issues, please contact our on-line support team at: support@entechnia.com for a quick answer to your question.

We appreciate your business!

enTechnia

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Glossary:

Add-in – A program that allows certain functions to be used from within Microsoft Office applications that support "Add-in" capability. Xpert Mailer is an "Add-in" that links the Word and Excel MSOffice applications with the Tranfinity Server to provide the rating and delivery options to you without leaving the application you are working in.

Address Block – The lines that make up a properly formatted address. For a business address in the U.S., it is commonly structured as such:

```
<Name>                    OR    <Company>
<Company>                       <Street Address>
<Street Address>                <City>, <ST> <Zip Code>
<City>, <ST> <Zip Code>
```

Airborne Express (Airborne) – A Seattle-based Express Service that was recently acquired by DHL. Airborne Express remains as the Domestic (U.S.) express line for small packages, letters and lab packs moving in one to two days.

Auto-text select – The process of allowing Xpert Mailer to select the text from within MSWord without the User having to "Click and Drag" to highlight the text themselves. Logic is placed in the Xpert Mailer software to help identify and select the address information more quickly.

Barcode or Bar code – A graphic symbol that contains information. Special scanners that can read this information to expedite data-entry can decode it. Most barcodes have human-readable text beneath them in the event the scanner cannot read the barcode, or the scanner is unavailable.

Carrier – A business that makes it's living by moving goods from one location to another. In the case of Xpert Mailer, the carriers are the common parcel and letter carriers such as Airborne, DHL, FedEx, UPS and the US Postal Service.

Configuration – A program or process that allows you to specify how you wish certain aspects of a computer program to work. For Xpert Mailer, this is accessed using the "Xpert Mailer/Settings" menu selection from within MSWord or MSExcel.

Configuring – The process of using the configuration program to make the Xpert Mailer application work in the manner you require.

Default Windows Printer – The printer that is set up on a Windows-based computer as the printer to be used as the "default" – when the User selects no other available printer.

Destination Address – The address of the person or business that is receiving the sent item(s). The Zip Code of the destination address is used by the majority of carriers to determine the cost to transport the item(s) being sent.

DHL – The largest international Express carrier in the world moving urgent shipments between most countries. Specializing in small packages and envelopes, they recently acquired Airborne Express to obtain a Ground delivery presence in the United States.

Error Message – A message that is displayed to the User when some process does not successfully complete. In some cases this may be due to insufficient or "bad" information, or a bad connection between the Client software and the Server, or other incompatibility.

Express Packaging – Carrier-specific packaging (in most cases supplied by the carrier) that displays their logo and service(s). To be used when that specific carrier and service is being selected for transport of a package or document.

Federal Express (FedEx) – Recognized as the Premier carrier for urgent letter and parcel shipments (Same Day, Next Day, etc...) as well as a major player emerging in the Ground Package delivery market. Specializing in the Express market, as well as residential small to mid-sized shipments via Ground services.

Information Systems – In this case, a group of personnel and associated equipment that functions to provide a business with the ability to gather, store, manipulate and dispense computerized data.

Install / Installation – Adding the software functionality of the Xpert Mailer to your computer by running the "install" program on the CD.

Local Host – When the "Server" is being run on the same computer as the "Client" application that is requesting the information or process. In this case, it is dealing primarily with how the computer is configured to interact with the Server software.

Mailroom Order – A document automatically produced by Xpert Mailer (Using MSWord) that has the information required to allow a Mailroom Clerk or other personnel to easily mail or ship the letter or packet processed with the Xpert Mailer application.

MSOffice – A group of software applications developed by Microsoft to allow you to work efficiently while performing your daily tasks of producing documents, spreadsheet, presentations and other data-analysis functions.

Multiple User – in this case, when multiple person(s) are using Xpert Mailer to access one copy of the Tranfinity Server on a computer network. This is a common installation in businesses with more than one person who send documents.

Packet – A small carrier-specific parcel, which by definition of its size and markings, will generally ship for a fixed price to a destination Zip Code. Varies by carrier.

Rate – Two definitions in this case:
      1) The process of determining a cost for the delivery charges for a letter or parcel.
      2) The actual Fee that is charged by a carrier to deliver a letter or parcel.

Rate Shopping – In this case, performing a range of "Rating" processes to allow comparison between carriers and services to offer options on delivery of a letter or parcel.

Rating – In this case, the process of comparing the specific weight, dimensions, origin location and destination location Zip Code of a letter or packet to determine the cost for a carrier to transport the item between the locations.

Remote Host - When the "Server" is being run on a different computer as the "Client" application that must communicate across a network to request the information or process. In this case, it is dealing primarily with how the computer is configured to interact with the Server software on the remote computer.

Settings – Where a User can configure the Xpert Mailer to operate in the manner that they require. Accessed using the Menu Selection "Xpert Mailer/Settings" from MSWord or MSExcel.
Setup – A computer program that helps install software in Microsoft Windows-based PCs and Servers.

Tranfinity Server – A high-speed "rules engine" produced by enTechnia Software, that allows other applications to request information or processes to be executed on command.

United Parcel Service (UPS or "Brown") – The commercial carrier that transports the largest number of small parcels in the United States. Specializing in Ground-Service transportation of small to mid-size shipments to both businesses and residences.

User – In this case, User is any person who is accessing the Xpert Mailer from an MSOffice application while they are working at their computer.

US Postal Service (U.S.P.S.) – The United States Postal Service, the major carrier of envelopes and small packages in the United States of America. Specializing in daily deliveries to every residence and business in the country.

When no selection – Part of the Auto-text select process. If this configuration item is activated, the software will only "auto-select" if the User has not already highlighted a block of text to be used for the Xpert Mailer process.