

User Guide

Version 8.0

The purpose of this document is to provide insight on how to configure and use various features of Assurety Integrated Mailing Solutions (AIMS) application. Features relative to use by Administrator and Application User will be mentioned separately wherever applicable.

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Note:

In this guide or document the word job means Mail.dat and vice versa. Both terms can be used interchangeably.

1 AIMS Login

To access the AIMS dashboard, a user must login using provided credential. The following steps needs to be performed.

- i. Launch provided URL of AIMS Plus.
- ii. Enter User ID.
- iii. Enter Password.

If the entered credentials match, then user will be redirected to the AIMS dashboard.

Upon having trouble to access AIMS, user can perform following actions.

- i. In case of incorrect/invalid password error, user can recreate password by clicking on a linked text, '*Forgot Your Password*', underneath *Login* button.
- ii. In case of License expiry, user can upload a license file by clicking on a linked text, '*Upload License*', underneath *Login* button.

1.1 [Forgot Your Password?](#)

Whenever user forgot the password; user can reset it by clicking on the “Forgot Password?” text which is located underneath the password field on a login screen.

- The link opens a new page in which user needs to enter new password and click on a “Send” button.
- This will send a password recovery request.
- A new password will be sent to the user via email address provided.

Note: User needs to enter “Username” on a Login screen in order to process to the password recovery screen.

1.2 Upload License

AIMSPlus license enables a user to access AIMSPlus for mail editing or perform administrative operation. For example, to create branch or add multiple users etc.

1.3 [Logout](#)

A user can logout from AIMSPlus by clicking 'Logout' option in drop down menu displayed after clicking on the arrow on top-right corner of screen.


1.4 [About](#)

About section shows the details of a licensed version of AIMSPlus.

AIMS Settings

2 Settings

Only the users having administrator rights is able to access the AIMS settings. Any changes made by administrator will be applied on entire application. In order to navigate the AIMS settings, follow these steps.

- i. Login to AIMS Plus.
- ii. Look for setting icon. 
- iii. Upon clicking on gear icon, it will redirect user to AIMS settings.

2.1 General

This section of AIMS Settings consists of those that are applicable to all areas of the application regardless whether any module is accessed by an Administrator or User.

2.2 Manage Company

In this section, a user can update Company Name. In order to perform this action, user must follow the steps.

Settings → General → Manage Company

The Company Name will be display in following functions.

- i. Export
- ii. Copies
- iii. Modified via HDR file changes
- iv. Merged Job
- v. Job Template (Edit Function)

User cannot change Company Code as it is AIMS auto generated. When a new license is purchased, there is a default value stored in this field User can only modify the Company Name in this section. In order to save the changes, user needs to click Save button and to discard the changes made by clicking on a Cancel button.

2.3 Branch Settings

This feature allows users with Administrator rights to decide whether branches can have the same User License Code (ULC) or will each branch have a unique ULC.

Perform following steps to modify branch settings.

Settings → General → Branch Settings

If the **Enable Duplicate ULC** is enabled (mark checked) then it will allow the current user to create multiple branches with same ULC.

- Every branch will have unique ULC if it is left unchecked.
- Clicking *Save* button will update the branch's ULC and by clicking *Cancel* button, the user will get redirected to dashboard.

2.4 Manage Branches

User can make modification in the data of the branches. The following actions can be performed.

- i. Add branch
- ii. Edit branch
- iii. Delete branch

Navigate the following steps to access Manage Branch.

Settings → General → Manage Branch

User can also sort the columns of a grid as per ascending or descending order. The following fields of a grid can be sorted as per user requirement.

- Branch Name
- Branch Code
- ZIP + 4/ Postal Code
- CRID
- Scheduler Corp ID
- Scheduler ID
- User License Code


The by default selected branch is Branch 01 which does not contain the following information.

- IMtb and IMb Mailer ID
- eDoc Sender CRID
- Scheduler Corp ID
- Scheduler ID
- Sequence number for IMcb, IMtb and IMb

2.4.1 [Add Branch](#)

User can add new branch by performing following steps. Branch can be added anytime and could be assign to multiple users at a same time.

Settings → Manage Branch → Add Branch

To add a branch, user must click the  icon. This will redirect user to the **Configure Branch** page where a user needs to enter validated data in the fields in order to make a branch. In order to configure MID a user needs to identify the following parameters.

- Select a 6- or 9-digit Mailer ID
- What should be the starting sequence number for IMtb, IMcb and IMb
- What should be the date on which the serial numbers are to start from

Each of the above fields is optional apart from MID which must be populated otherwise the record will not be saved. Once the user has filled out the fields, click on Add button and the MID information will be saved against the branch.

By default, if there is only 1 MID record and it will be marked as Default otherwise, in case of multiple MID records the user needs to select which MID to be marked as Default.

- i. To save all of the branch information including the MID info; user needs to click *Save* button.
- ii. If at any point the user clicks Cancel button then user gets redirected to **Manage Branches** page.

2.4.2 Edit Branch

User can edit any branch by performing following steps. Branch can be edited anytime and could be reassign to any user at a same time.

Settings → General → Manage Branch → Edit Branch

To edit a branch, user must click the edit icon. This will redirect user to the **Configure Branch** page where a user can update existing data. By clicking on a Save button, all the changes made will be saved and in case of clicking Cancel button, no changes will be saved. User can perform following actions on **Configure MID**.

User can make modifications in a MID of a branch as per followed.

- Add a new MID against the Branch
- Modify an existing MID information
- Delete a MID associated with the Branch

If a MID is deleted, there will be no impact on any Mail.dat Job in which the MID has been used only that it will not be available for:

- IMcb generation
- IMtb re-sequencing
- IMb re-sequencing

In order to modify MID, a user needs to perform following steps.

- i. Click on the edit icon besides a MID record which will display Update MID popup containing all the fields that can be modified.
- ii. Modify the information and click Update button to save entered data.
- iii. Once modified information is saved successfully, a user will get redirected to the Manage Branch page.

Note: A MID marked as default cannot be deleted, the user will have to create another MID record mark that as default and then delete the original MID.

2.4.3 [Delete Branch](#)

In order to delete a branch, a user needs to perform following steps.

Settings → General → Manage Branch → Delete Branch

User needs to click on cross icon in order to delete a branch. Before branch getting deleted, a user will be displayed a confirmation prompt.

If user clicks *OK* button, then a branch will get deleted from a database and AIMS.

If user clicks on *Cancel* button, then the branch remains as-it-is.

Note: If there are no active users tied to the Branch or Jobs imported in that Branch only then will the Branch record be deleted, otherwise an error message will be shown.

2.5 [Manage User](#)

In order to access the AIMS, Users need to be created which can have different rights based on whether a user is marked as:

- **Admin:** They have configuration rights of operating entire AIMS features. (Based on Licenses)
- **User:** They have access to all features (Based on Licenses) but not allowed to access to Settings menu.

User needs to perform following steps to access Manage Users page.

Settings → General → Manage Users

Users with Administrator rights are able to:

- Add new users
- Modify existing user information
- Delete users
- Reset current session status of a user

2.5.1 [Add User](#)

A new user can be added by an admin anytime by performing following steps.

- Settings → General → Manage Users → Add User

An admin needs to click on user plus icon to add new user. By clicking this icon, a user will be redirected to **Add User** page. To enter new user information, admin needs to follow these steps:

- Enter a valid user ID.
 - i. User ID must be at least 8 characters long.
 - ii. Only alphabet and numbers are allowed.
- Provide a valid password.
 - i. Password should be of 8-20 characters.
 - ii. Must have at least one number.
 - iii. Must have one alphabet.
 - iv. No special characters.
- Select a user role.
 - i. User
 - ii. Admin.
- The Active option must be checked for the user account otherwise user will not be able to login.
- Assign one or more branches to this User.
 - i. User must be associated with at least one branch.
- Upon selecting any branch as default for a user, then following fields must be populated automatically.
 - ii. CRID
 - iii. Scheduler ID
 - iv. Scheduler Corp ID
 - v. PO Credentials
 - vi. MID
- Admin can also add the PostalOne! User ID and password which the user would be able to use for Scheduling feature.

- After entering required user information, click *Save* button.

If all the user information is valid then user account will be created and confirmation message will be displayed.

- New user account will be displayed at user profile grid.

Note: *If at any moment Cancel button is clicked then no record will be added and user will be directed back to Manage Users page.*

2.5.2 [Edit User](#)

A user data can be edit by an admin anytime by performing following steps.

- Settings → General → Manage Users → Edit User

An admin needs to click on edit icon to edit user data. By clicking this icon, a user will be redirected to Edit User page. In order to modify user data, follow these steps.

- i. If the Active check is marked off then the User will no longer be able to access the application.
- ii. To mark Active for an In-Active user.
 - a. Repeat Steps 1 to 2.
 - b. Mark the Active checkbox.
- iii. Click *Save* button.
 - a. If all information is valid then confirmation message will be displayed.
 - b. User will be redirected to Manage Users page.


Note: *If Cancel button is clicked then no information will be updated and the user will be directed to Manage Users page.*

2.5.3 [Delete User](#)

In order to delete a user, an admin needs to perform following steps.

- Settings → General → Manage Users → Delete User

Figure 16 - Delete User

Admin needs to click on  icon in order to delete a user. Before user getting deleted, an admin will be displayed a confirmation prompt.

- If admin clicks Ok button, then a user will get deleted from a database and AIMS.
- If admin clicks on Cancel button, then the user remains as-it-is.

The following conditions are checked before deleting a user.

- There are no Jobs imported by that User.
- There is at least 1 more user record with Admin rights.

2.5.4 [Reset Session](#)

This option allows a current user session to be terminated if for any reason an Active user was unable to login with a valid password. In order to navigate this, follow these steps:

- Settings → General → Manage Users → Reset Session

Admin needs to click on reload/refresh icon in order to reset user's session. Before user's session getting deleted, an admin will be displayed a confirmation prompt.

- If admin clicks *Ok* button, then a user will get deleted from a database and AIMS.
- If admin clicks on *Cancel* button, then the user remains as-it-is.

2.6 [Manage CSV Template](#)

User can manage the existing job templates by following these steps.

- Settings → General → Manage CSV Template

A user can look for any job template from any branch by selecting from given branch dropdown list. User can perform following action from grid.

- Add new CSV template

- Edit existing template
- Delete the selected template

2.6.1 [Add Template](#)

User can navigate to the add template page by following these steps.

- Settings → General → Manage CSV Template → Add Template

User needs to enter the data in following fields.

- i. Form Row No.
 - The starting row number in flat file.
- ii. To Row No.
 - The ending row number in flat file.
- iii. Column No.
 - The column number in flat file.
- iv. Column Separator
 - The separator used in a template. It could be one of following.
 - Comma (,)
 - Semi Colon (;)
- v. Template Name

After clicking *Save* button, a new CSV file template will be created.

Note: *If at any moment Cancel button is clicked then no record will be added and user will be directed back to Manage CSV Template page.*

2.6.2 [Edit Template](#)

User can navigate to the edit template page by following these steps.

- Settings → General → Manage CSV Template → Edit Template

After clicking *Save* button, all the changes made will be saved successfully and previous data cannot be restored.

Note: *If at any moment Cancel button is clicked then no record will be added and user will be directed back to Manage CSV Template page.*

2.6.3 [Delete Template](#)

In order to delete a template, a user needs to perform following steps.

- Settings → Manage CSV Template → Delete Template

User needs to click on cross icon in order to delete a template. Before template getting deleted, a user will be displayed a confirmation prompt.

- If user clicks *Ok* button, then a template will get deleted from a database and AIMS.
- If user clicks on *Cancel* button, then the template remains as-it-is.

2.7 [Reference Data](#)

To allow user to create appointment and update, reference data needs to be downloaded via these two formats.

- Automatic at scheduled times
- Manual

Follow these steps to download reference data.

- Settings → General → Reference Data

2.7.1 [Manual Download](#)

To download a reference data manually, user needs to follow these steps.

- Settings → General → Reference Data → Manual Download

Following steps needs to be perform to download data successfully.

- i. Click *Start* button in Manual Download section.
- ii. Wait under the File Status to be change to Completed.
 - This indicates that the process has been finished successfully.
- iii. Once the downloading starts; it cannot be paused or canceled.
 - Clicking on a *Cancel* button; nothing going to happened.
 -

2.7.2 [Automatic Download](#)

To schedule a reference data to be downloaded automatically, user needs to follow these steps.

- Settings → General → Reference Data → Automatic Download

Following steps needs to be perform to download automatic data successfully.

- i. Mark the Active checkbox.
- ii. Select one of following methods
 - i. Weekly Update based on time and day
 - Time format (hh:mm)
 - Day
 - ii. Daily update based on time only
 - Time format (hh:mm)
- iii. Click on Save button to confirm the schedule.

Note: *If any previous settings are modified but clicked Cancel button then the changes will automatically discard.*

2.7.3 [Deactivate Automatic Data Download](#)

User can deactivate automatic scheduled download by following these steps.

- Settings → General → Reference Data → Automatic Reference Data

To deactivate the scheduled automatic download, user needs to perform following steps.

- Mark *Active* checkbox to uncheck which will halt all the automatic scheduled downloads.
- Click on Save button to save the changes made.

2.7.4 [Password Request](#)

User can look for the total password requests by following these steps.

- Settings → General → Password Request

This screen shows all the passwords requests that user has made using currently active/logged-in account.

2.8 [Schedule Tracking](#)

AIMS has the functionality to automatically retrieve responses from FAST against a previously submitted request using MRRR message when FAST had responded with a tracking ID. The feature looks for any available Tracking ID in the system (sent by FAST) to send MRRR request to seek the updated status as per the defined schedule.

To navigate the tracking, following steps needs to be followed.

- Settings → General → Schedule Tracking

To execute the tracking, follow these steps.

- i. Select time duration when to send tracking request:
 - a. After every "N" Minutes or
 - b. After every "Y" Hours
- ii. Click *Save* button to save changes.

2.8.1 [Delayed Tracking Configuration](#)

If due to any response there is no response from FAST, users with Admin level privileges can schedule delayed tracking or when to stop sending tracking requests. Follow these steps to navigate it.

- Settings → General → Schedule Tracking

Make sure the checkbox is marked Active.

- i. Select hours after which tracking requests are to be halted.
- ii. Check Send Tracking request after preferred Date/Time checkbox
- iii. Click on *Save* button

2.8.2 [Modify Tracking Configuration](#)

To modify any of the Tracking Configurations, following steps needs to be performed.

- Settings → General → Schedule Tracking

Update the changes. Mark the Active checkbox unchecked. This will no send any configuration requests. Update the times when to send tracking requests.

- Click *Save* button to save all the changes made.

Note: *Clicking on Cancel button will not save updated configurations and keep old settings.*

2.9 [Manage Partners](#)

Partners are those 3rd party carriers to whom Containers have been passed onto for Palletization and/or Transportation. This module allows users to configure Partner information so that their respective Container information can be fetched from FAST whenever data is available.

To manage partner, user needs to follow these steps.

- Setting → General → Manage Partners

2.9.1 [Add Partner](#)

User needs to follow the following steps to add new partner.

- Setting → General → Manage Partners → Add Partner

By clicking Add button a new partner will be added. Only administrators are allowed to add/edit/delete/view Partner Profiles' data.

Note: *Partner profile data cannot be deleted in a case when any Consignee Appointment ID is associated with the partner. Name and roles are required for partner. These credentials are used for appointment query.*

2.9.2 [Search Partner](#)

In order to search partner, user needs to follow these steps.

- Settings → General → Manage Partner → Search

Figure 29 - Search

Upon entering the data in a following field, user will get a partner data in a form of grid.

- i. Name
- ii. Roles
 - a. Mailer
 - b. Printer
 - c. Comingle
 - d. Consolidator
 - e. Co-Palletizer
 - f. Carrier

2.10 [AIMS Page Settings](#)

AIMS allows user to set features to be display in the “List of Jobs” page. User needs to follow these steps to enable or disable these functions on job list's page.

- Settings → General → AIMS Page Settings

3 Mail Assurety

The main editing features of AIMS lie within Mail Assurety module through which individual and batch records can be impacted in a single or multiple file (depending on the functionality).

To navigate to these settings:

- Settings → Mail Assurety

3.1 Job Import

There are configuration settings for different features which are applied whenever a Jobs is imported.

- AIMS Website
- Batch Tool

To navigate this module, follow these steps.

- Settings → Mail Assurety → Job Import Settings

The settings will be applied only on branches thus different branches can have different settings for any feature.

Note: *Only users with Admin level rights can make changes to the settings for a respective branch.*

3.1.1 [AIMS Prefix ID](#)

This feature allows an Administrator level user to decide what prefix would be added to a Job upon performing following actions:

- i. A new Job is created in AIMS via Merge or Split functionalities.
- ii. An existing Job's copy is created by a user.
- iii. A Job is exported with uniquely assigned AIMS ID instead of Mail.dat Job ID.

User needs to follow these steps to set AIMS ID Prefix:

- Settings → Mail Assurety → Job Import Settings → AIMS Prefix ID

Enter a maximum 3-character value in:

- AIMSID Prefix for Original Job

- AIMSID Prefix for Replica Job

Click on “Save” button to save all the changes made.


Note: *Avoid setting special characters and/or spaces in AIMS ID Prefix as some features will display errors during execution.*

3.1.2 Mail.dat Template

At times there would be a need to have default Mail.dat Template applied whenever a Job is imported into AIMS. This saves a user from manually applying Mail.dat Templates (which can be tedious if the number of Jobs is large or are imported during off hours).

To configure Mail.dat Template perform the following steps:

- Settings → Mail Assurety → Job Import Settings → Mail.dat Template

When you click on an  icon, it will expand the section and user will get the fields which will help to navigate a particular template.

1. Users
 - a. Select a user name from a given dropdown.
2. Template Name
 - a. Select a template name from a given dropdown.

If a user chooses to set the branch default, then mark the checkbox. To get a preview of the select template then user needs to click on a “View Template”.


3.1.3 Recalculate Piece Count and Weight

This configuration serves dual purposes as it allows the Administrator to have AIMS correct at import time for a branch:

- 2 Count of pieces in PDR / PBC, PQT, CQT and CSM files
- 3 Correct the weight derived from CPT, MPU and CSM files with count of pieces per handling unit

This ensures that the user does not have to manually correct weights and/or piece counts for imported Jobs should there be any error in the Mail.dat provided from Presort.

Calculate Mail.dat for Pieces & Copies Count

Turning on this configuration will only calculate pieces and copies information in Mail.dat files (where applicable) with respect to actual piece record(s) count(s) in Piece /PQT file. To turn on this setting, user needs to click on an  icon to expand the menu.

- Settings → Mail Assurety → Job Import Settings → Re-calculate Piece Count and Weight


Mark the “*Calculate Mail.dat for Pieces and Copies and Weight*” to enable it.

Now whenever a Job would be imported, the CSM, CQT and PQT files would be updated as piece counts would be synchronized. All other files would remain unaffected.

To turn off this feature, user needs to unmark the “*Calculate Mail.dat for Pieces and Copies and Weight*” checkbox.

Note: By default, all import time settings are turned off.

Calculate Mail.dat for Mail Piece Dimensions

This configuration allows the correction of weights and other dimensions as mentioned in Mail.dat driven by the CPT, MPU files for consolidation at CSM level. To turn on this setting, user needs to click on an  icon to expand the menu.

- Settings → Mail Assurety → Job Import Settings → Re-calculate Piece Count and Weight


Mark the “*Calculate Mail.dat for Mail Piece Dimensions*” to enable it.

Now whenever a Job would be imported, the MPU and CPT files would be updated as piece counts would be synchronized. All other files would remain unaffected.

To turn off this feature, user needs to unmark the “*Calculate Mail.dat for Mail Piece Dimensions*” checkbox.

Note: By default, all import time settings are turned off.

3.1.4 [PostalOne! Validation](#)

AIMS allows users to run PostalOne! validations on all successfully imported Jobs so that users can view any errors and/or warnings present in a Job. Jobs are then marked as having passed PostalOne! validations or failed. This configuration will execute PostalOne! validations on all imported Jobs. To turn on this setting, user needs to click on an  icon to expand the menu.

- Settings → Mail Assurety → Job Import Settings → Re-calculate Piece Count and Weight

Mark the *“Run PostalOne! Validations at time of Job Import”* to enable it.

Now, whenever a Job is imported, all PostalOne! validations implemented in AIMS would be run against it with result then marked on Job Dashboard and for details the PO Validation page can be viewed.


To turn off this feature, user needs to unmark the *“Run PostalOne! Validations at time of Job Import”* checkbox.

Note: *By default, this option is turned off.*

3.1.5 [Allow Duplicate Jobs](#)

This configuration allows user to import duplicate jobs in a branch

- With the Original business job ID
- With AIMS ID as business job ID

To turn on this setting, user needs to click on an  icon to expand the menu.

- Settings → Mail Assurety → Job Import Settings → Allow Duplicate Jobs

Mark the *“Allow Duplicate Jobs”* to enable it. Or Mark the *“Import Job with AIMS ID”* to enable it.

Note: *If Import Job with AIMS ID check box is checked then job will be imported with AIMS ID as a business job Id if this checkbox is not selected then it will import job with its original Job Id.*

3.1.6 AIMS Revision No


This configuration allows user to uniquely identify duplicate jobs on AIMS dashboard whenever a duplicate job is imported/ a replica job is created (as a result of copy job)/a new job is created (as a result of split action) in AIMS. Revision numbers are updated on the basis of two conditions:

- Licensed User's Job Number
- Job ID

User can select only one condition at a time for a branch.

- If Licensed User's Job Number setting is turned on then every time a job is imported with same Licensed User's Job number, then it will increment Revision number by 1.
- If Job id settings is turned on then every time job with same job Id is imported Revision number value will be incremented by 1.

Note: *user can import duplicate job only when 'allow duplicate job' settings are turned on.*

To turn on this setting, user needs to click on an  icon to expand the menu.

- Settings → Mail Assurety → Job Import Settings → Revision Number

User can select any one of the following options.

- Select Licensed User's Job Number or Job ID. (only one can be selected at a time)


Note: *By default, Licensed User's Job Number is selected so if any job with same job number is imported, its revision number will be incremented by 1.*

3.1.7 [Postal One! Client Validation](#)

AIMS PO! Export Feature allows User to export the imported job as a compressed zipped file to the Postal One! user can export job as

- Original job
- Updated job.

This configuration allows user to see the status of their PostalOne! exported job after completion of client validation, Only Administrator level user have rights to turn on or turn off this configuration.

To turn on this setting, user needs to click on an  icon to expand the menu.

- Settings → Mail Assurety → Job Import Settings → Postal One! Client validation Service

Mark the “*PostalOne! Client Validation*” to enable it and unmark it to disable.

Note: *If this setting is turned off the status of Postal One! Exported job will update after completion of server validation.*

Turning on this setting will update the Postal One! Exported job status as success or failed and will make containers available for further update after completion of client validation for below defined container statuses only

4. Original job with Preliminary (P) container status.
5. Original job with Ready to pay (R) container status.
6. Update Ready to pay (R) container status.

Note: *Status of the Jobs other than above defined statuses (i.e., Cancel, Transportation update, Paid) will not be updated after client validation, status of the jobs with these container statuses will be update only after completion of server validation.*

3.1.8 [Import Validation](#)


Since Mail.dat provides a number of alphanumeric values in a number of fields along with certain enumeration values so there are chances invalid values could be present in any one of these fields.

By invalid, the following is implied:

- The value is no longer supported by Mail.dat and the Job is not allowed to be processed
- The value data-type is supported and supported by Mail.dat but it will fail PostalOne! validation(s)
- There is a required mandatory field whose value is missing and the Job will not be imported by AIMS

The following are 3 types of import validation checks present:

1. **Validate Required Fields:** Check at import time if all mandatory fields are populated.
2. **Validate Required Fields Data Types:** Check at import time that valid values are populated in mandatory fields.
3. **Validate Referential Integrity:** Check the referential integrity of Mail.dat fields.

To turn on this setting, user needs to click on an  icon to expand the menu.


- Settings → Mail Assurety → Job Import Settings → Import Validation

Mark anyone of validation to enable it and unmark it to disable. On Job Import page, the respective Error description will be displayed if a Job violates the marked validation.

Note: *By default, all validations are turned off.*

3.1.9 [PostalOne! Export Auto Finalize](#)

This configuration allows user to auto finalized their Postal One Exported successful jobs statements that are exported with Ready to pay (R) container status.

To turn on this setting, user needs to click on an  icon to expand the menu.

- Settings → Mail Assurety → Job Import Settings → PostalOne! Export Auto Finalize

Mark the checkbox to enable it and unmark it to disable.

Note: turning off this setting will not auto finalize any statement in AIMS even if it is finalized by Postal one clerk on BCG (Business customer Gateway).

3.1.10 [Campaign Settings](#)

AIMS allows user to enable or disable the feature that runs a campaign. Follow these steps to perform this action.

- Settings → Mail Assurety → Job Import → Campaign Settings

User need to enable “Auto Generate Campaign Code” to get interlinked attributes gets enabled which are following.

- Mailer Campaign Grouping ID
- ULC
- Job ID
- Serial No.

3.1.11 [PMOD Settings](#)

PMOD stands for *Priority Mail Open and Distribute*. User needs to follow these steps.

- Settings → Mail Assurety → Job Import → PMOD Settings

User needs to define maximum number of trays in a job and maximum sac weight. This will apply to every job that will get uploaded in a branch in which the setting is applied. Other branches will stay separated with this setting.

3.1.12 Spoilage Settings

Spoilage setting allows the user to set the functions of spoilage. User needs to follow these steps.

- Settings → Mail Assurety → Job Import → Spoilage

User can define if they want to reset the pervious spoilage markers upon using a new spoilage CSV via Batch tool or WEB. By checking the box all pervious spoilage indicators would be removed and only the new CSV items for the spoilage would be marked. Other branches will stay separated with this setting.

By selecting the PO! Export the new spoilage file would not be applied to the PO exported job on the container statues R and onwards. P marked containers would be marked.

3.2 Job Restrictions

If an Administrator rights user wants to restrict the usage for a specific Mail.dat® version for any specific reason, then that is possible through this setting. If a Mail.dat® version is restricted, no user will be able to import any job belonging to that Mail.dat® version and/or no job can be upgraded to that particular Mail.dat® version.

To set the Job Restrictions perform the following steps:

- Settings → Mail Assurety → Job Restrictions

Mark the checkbox to enable it and unmark it to disable.

Figure 43 - Job Restrictions

Select one or both of the following:

- **Restrict Import Of:** Any Job containing this Mail.dat version will not be imported.
- **Restrict Upgrade To:** Job will not be allowed to be upgraded to this particular Mail.dat version.

Click on a “Save” button to save the settings or “Cancel” button to discard the changes made.

Note: *By default, there are no restrictions applied.*

3.3 Publication Numbers

This section allows a user with Administrator level rights to populate list of Publication Numbers. This list will be used when a user wants to edit or modify a Periodicals mailing job. These values will appear in the MPA file in a drop down from which a user can select the desired value. Follow these steps to navigate through the Publication Number.

- Settings → Mail Assurety → Publication Numbers

3.3.1 Add New Publication Number

To add publication number, perform the following steps:

- Settings → Mail Assurety → Publication Numbers → Add Publication Number

Following fields needs to be filled by the user in order to proceed to add the Publication number.

- USPS Publication Number
- Title
- Publisher
- Finance Number
- State
- City
- Permit Zip+4

Click “Save” button to save all the changes made. Upon clicking on “Cancel” button, all the changes made will be discard.

3.3.2 Modify Publication Record

To modify publication record, user must click the edit icon.

- Settings → Mail Assurety → Publication Numbers → Edit Publication Number

Click “Save” button to save all the changes made. Upon clicking on “Cancel” button, all the changes made will be discard.

3.3.3 Delete Publication Record

In order to delete a user, an admin needs to perform following steps.

- Settings → Mail Assurety → Publication Number → Delete Publication Number

Admin needs to click on cross icon in order to delete a user. Before user getting deleted, an admin will be displayed a confirmation prompt.

- If admin clicks “*Ok*” button, then a publication number will get deleted from a database and AIMS.
- If admin clicks on “*Cancel*” button, then the publication number remains as-it-is.

3.4 Permit Numbers

This section allows a user with Administrator level rights to populate list of Permit Numbers. This list will be used when a user wants to edit or modify a Job other than Periodical’s mailing.

These values will appear in the MPA file from which the desired value can be selected. Follow these steps to navigate through the Permit Number.

- Settings → Mail Assurety → Permit Numbers

3.4.1 Add New Permit Number

To add permit number, perform the following steps:

- Settings → Mail Assurety → Permit Numbers → Add Permit Number

Following fields needs to be filled by the user in order to proceed to add the Publication number.

- Permit Number
- Permit Holder Name
- State
- City
- Permit Zip+4
- Payment Account Number
- Payment Method

Click *"Save"* button to save all the changes made. Upon clicking on *"Cancel"* button, all the changes made will be discard.

3.4.2 Modify Permit Record

To modify permit record, user must click the edit icon.

- Settings → Mail Assurety → Permit Record → Edit Permit Record

Click “Save” button to save all the changes made. Upon clicking on “Cancel” button, all the changes made will be discard.

3.4.3 Delete Permit Record

In order to delete a permit record, an admin needs to perform following steps.

- Settings → Mail Assurety → Permit Record → Delete Permit Record

Admin needs to click on cross icon in order to delete a Permit Record. Before user getting deleted, an admin will be displayed a confirmation prompt.

- 2 If admin clicks “Ok” button, then a permit record will get deleted from a database and AIMS.
- 3 If admin clicks on “Cancel” button, then the user remains as-it-is.

3.5 Customer Info/Permit Info

Customer Info:

This feature enables users to access comprehensive information about their customers, including personal names, dedicated IDs, business names, contact numbers, business addresses, and more.


3.5.1 [Add Customer Info](#)

Users can easily add new customers by selecting the "Add Customer" button located in the top right corner of the grid. Upon clicking, a new screen will be displayed, allowing users to input the details of the customer they intend to add. After filling in all the required information, users can choose to save the data by clicking the save button. Alternatively, they can opt to discard the information by selecting the cancel button.

3.5.2 [Delete Customer Info](#)

This feature enables users to delete customer information effortlessly by clicking the button. Upon clicking, an alert screen will pop up, providing users with the option to confirm the deletion by clicking "OK." If users decide to cancel the deletion, they can do so by selecting the "Cancel" option.

3.5.3 [Edit Customer Info](#)

Users can easily edit the existing customers by clicking  button. Upon clicking, a new screen will be displayed, allowing users to re-input the details of the customer they intend to modify. After filling in all the required information, users can choose to save the data by clicking the save button. Alternatively, they can opt to discard the information by selecting the cancel button.


Permit Info:

This feature allows users to retrieve detailed information such as permit number, customer ID, postage payment details, authorization number, state, city, and other relevant data.

3.5.4 Add Permit Info

Users can easily add new permit info by selecting the "Add Permit" button located in the top right corner of the grid. Upon clicking, a new screen will be displayed, allowing users to input the details they intend to add. After filling in all the required information, users can choose to save the data by clicking the save button. Alternatively, they can opt to discard the information by selecting the cancel button.

3.5.5 [Edit Permit Info](#)

Users can easily edit the existing permit info by  clicking button. Upon clicking, a new screen will be displayed, allowing users to re-input the details they intend to modify. After filling in all the required information, users can choose to save the data by clicking the save button. Alternatively, they can opt to discard the information by selecting the cancel button.

3.5.6 [Delete Permit Info](#)

This feature enables users to delete existing permit information effortlessly by clicking the button. Upon clicking, an alert screen will pop up, providing users with the option to confirm the deletion by clicking "OK." If users decide to cancel the deletion, they can do so by selecting the "Cancel" option.

3.6 [By/For Validation](#)

User can modify the permit number for BY/For Validation by following these steps.

- Settings → Mail Assurety → By/For Validation

User can perform following actions.

1. Add
2. Edit
3. Delete

3.6.1 [Add Permit Record](#)

In order to add new permit record user needs to follow these steps.

- Settings → Mail Assurety → By/For Validation

Once all the fields have been filled, user needs to click “*Save*” button to save all the records entered in the fields. Upon clicking “*Cancel*” button all the record will get discard.

3.6.2 [Edit Permit Record](#)

User needs to click an edit icon from grid which redirects user to Modify Permit Record page. User can update the permit record anytime by following these steps.

- Settings → Mail Assurety → By/For Validation → Edit Permit Record

User needs to enter valid data in order to modify data. Click “*Save*” button to save changes. Click “*Cancel*” button to discard modifications made.

3.6.3 Delete Permit Record

User needs to click an icon from grid which will show a prompt message to the user with two options.

- Click “Ok” to delete selected record.
- Click “Cancel” button to discard deletion.

3.7 Verification Facility Info

This menu allows users

3.7.1 Add New Verification Facility Info Record

To add Verification Facility Info, perform the following steps:

- Settings → Mail Assurety → Verification Facility Info → Add Verification Facility Info

Figure 56 - Add Verification Facility Info

Click “Save” button to save all the changes made. Upon clicking on “Cancel” button, all the changes made will be discard.

3.7.2 Edit Verification Facility Info Record

To modify Verification Facility Info, user must click the edit icon.

- Settings → Mail Assurety → Verification Facility Info → Edit Verification Facility Info

Figure 57 - Edit Verification Facility Info

Click “Save” button to save all the changes made. Upon clicking on “Cancel” button, all the changes made will be discard.

3.7.3 Delete Verification Facility Info Record

In order to delete a Verification Facility Info record, an admin needs to perform following steps.

- Settings → Mail Assurety → Verification Facility Info → Delete Verification Facility Info

Admin needs to click on cross icon in order to delete a Verification Facility Info. Before user getting deleted, an admin will be displayed a confirmation prompt.

- If admin clicks “*Ok*” button, then a Verification Facility Info will get deleted from a database and AIMS.
- If admin clicks on “*Cancel*” button, then the Verification Facility Info remains as-it-is.

3.8 Tare Profile

Tare profiles are used to define the weight of empty container (Different types of pallets, trays and Top caps) that can be later utilized for the calculation of gross weight of the containers.

- Settings → Mail Assurety → Tare profiles

Administrators can create a set of profiles that can have the usually used container information. Later on, these profiles can be utilized by application users as per the need.

3.8.1 Add Tare Profile

Only Administrator level user can add, associate or edit tare profile. To add Tare Profile, perform the following steps:

- Settings → Mail Assurety → Tare Profile → Add Tare Profile

Click “Save” button to save all the changes made. Upon clicking on “Cancel” button, all the changes made will be discard.

3.8.2 Tare Associate

To associate tare profile with any branch. Click *Associate* text-link against tare profile which will redirect user to the tare page as shown in the figure:

- Select branch from the branch list box.
- Click on right shift operator button shown in figure:
- Click “*Update*” button which will associate the tare profile with the selected branches.
- Clicking on “*Cancel*” will not make any changes.

Note: *user can associate single Tare profile with multiple branches as well.*

➤ **Remove Associate**

Administrator user can also remove associated branches from the tare profile. To remove any branch from associated branch list:

- Click on Associate link against tare profile which will redirect user to the tare page.
- Click on the branch from associated branch list box.
- Click on left shift operator button.
- Click “*Update*” button.

Clicking on “*Cancel*” will not make any changes.

3.8.3 [Edit Tare Profile](#)

To modify Verification Facility Info, user must click the  icon.

- Settings → Mail Assurety → Tare Profile → Edit Tare Profile

Modify the data and click “Save” button to save changes. Clicking “Cancel” will redirect user to the Tare profile.

3.8.4 [Delete Tare](#)

In order to delete a Tare Profile record, an admin needs to perform following steps.

- Settings → Mail Assurety → Tare Profile → Delete Tare Profile

Admin needs to click on cross icon in order to delete a Tare Profile. Before user getting deleted, an admin will be displayed a confirmation prompt.

- If admin clicks “Ok” button, then a Tare Profile record will get deleted from a database and AIMS.
- If admin clicks on “Cancel” button, then the Tare Profile record remains as-it-is.

3.9 CRID Verification

AIMS facilitates users with Administrator level rights to Verify "Mail Owner CRIDS" using this feature. To perform CRID verification perform the following steps:

- Settings → Mail Assurety → CRID Verification

Follow these steps to work on this.

- Mark the "*I agree to the Terms of Service*" checkbox.
- Click on "*Save*" button beneath Legal Agreement menu (Do read the terms and conditions in Legal Agreement).
- Provide a valid CRID value in each of the branches under **Manage Branches** menu.

3.10 Upload Zone Matrix File

User can upload zone matrix file by following these steps.

- Settings → Mail Assurety → Upload Zone Matrix File

A file must be in ".txt" format. Once the uploading completed, the screen will display following messages.

1. If green tooltip is displayed then it means file is successfully uploaded.
2. If red tooltip is displayed then it means file have some issues and uploading got failed.
 - a. Change of file format
 - b. Invalid data
 - c. Error in data

Mail Assurety

4 Mail Assurety

AIMS is divided into 6 core modules under which there are number of features available for varying purposes. Mail Assurety allows a user of AIMS (Administrator or User) to:

1. Import Jobs
2. Modify single or multiple records in:
 - a. Single Mail.dat file
 - b. Multiple Mail.dat files
3. Export Jobs as
 - a. Original
 - b. Updated
 - c. Deleted
 - d. Campaign specific

Upon successful login, a user will be directed to the Job Dashboard.

4.1 Mail.dat

The Job Dashboard shows all the Jobs that have been successfully imported into AIMS and is the landing page of the application upon successful Login for the default branch of the user (in case of multiple branches assigned).

A user can search for a particular Job via any of the following search filters:

1. **Job ID:** The Mail.dat Job ID present in the Job
2. **Job Originator:** Search via username
3. **Job No:** We can search for a specific job number
4. **AIMS ID:** The unique ID provided by AIMS
5. **Presentation Category:** We can Search for Presort or MLOCR
6. **Class:** We can search for FCM or STD or any other imported category
7. **Job Name, Title and Issue:** We can search for a specific Name number
8. **Shape:** We can search for LTR, FLTS Cards etc.
9. **DTAC Version:** We can search the last 3 available versions through dropdown.
10. **Job Import Date:** We have an option to search for imported jobs from the last 7 days till custom dates
11. **PO Statues:** We can filter out all the jobs with the current PO Statues

4.2 Job Import

Jobs that follow the Mail.dat specifications and structure and which are in ZIP format only can be imported in AIMS by performing the following steps:

1. Go to Import Job screen from title bar of Mail Assurety.
2. Select a branch through which the job must be processed from the Branch dropdown and selected branch will be shown with import status heading also.
3. Select the job file (supported job file format is ZIP) using the dialog box by browsing the physical path of the job where it's placed.
4. You can upload multiple files by browsing and selecting a single file at a time.
5. Click on Upload button.
6. Job uploaded successfully and error description will be shown as N/A.

Note: Any configurations turned on that modify records in the Job will be activated and information updated accordingly only if the Job import status is marked as Successful.

4.2.1 [Detail in A Job Grid](#)

In order to view or modify any information in a Job, click on Job ID value either on Job Dashboard page or on Job Import page which will direct the user to Job Details page.

4.2.2 [Locked Job/ Unlocked Job postages](#)

The job gets locked upon making changes in the existing files for other users.

Job ID: sb000184

4.2.3 [Unlocked Job](#)

Once the desired function is completed the job Auto unlocks. User can click on an lock icon in order to unlock a locked job.

Job ID: 00000861

4.3 [Summary](#)

The job summary contains the information of all the files exists in a Job.

4.3.1 [Job Info](#)

A User can view comprehensive information of the Mail.dat and its Containers from Job Details screen. At first glance user can see statuses and destinations of the containers in Pie charts.

4.3.2 [Job Detail](#)

AIMS allows users to modify single and multiple records in individual files via the Job Details page.

To enter into modification of an individual file perform the following steps:

➤ Job ID → Summary → Job Details → Select File

Figure 69 - Job Detail

Depending on the type of file the following functionalities are provided in each:

1. Edit a single existing record
2. Edit multiple records
3. Delete a single record
4. Delete multiple records
5. Add a new record (available in only selected files)

Note: *Some functionalities are restricted and will give error messages due to:*

1. Referential integrity compromised because of action performed
2. Records should only belong to the same segment
3. Cascade affect is violating Mail.dat structure
4. All records in a particular file would be deleted which is not allowed in mandatory files

4.4 [File View Detail's](#)

All the jobs imported into AIMS have files which could be viewed and edited through file view. File view gives us all the availed files in the mail.dat. we can click each file and perform certain actions which are available.

4.4.1 [HDR File view](#)

We can view the HDR file and edit all editable fields which contain important information about the job.

4.4.2 SEG File view

We can view the segments in the job. This would show us if the job is multi-segmented. We can select multiple segments at once to edit.

We can also see the fields divided into optional and mandatory separators so that critical data would be populated.

4.4.3 CPT File view

This would show all the components in the job. We can select multiple component's at once to edit or delete from the job.

We add CCR file by selecting signal or multiple components in the job then clicking the Add CCR function.

Once we have selected all the required CCR felids to be added we can click save and all the related components would be modified to show the added new CCR.

Note: We can view the same from the edit function of the component.

4.4.4 [MPU File view](#)

We can view all the available MPU in the file and edit the required MPU if needed

4.4.5 Edit Record

To modify a single record in any particular file:

1. Click on desired file on Job Details page.
2. Select one or more records
3. User can search for record(s) via Search options available. These vary from file to file.
4. Click on Edit link.
5. Make desired changes.

6. Click on Save button.
7. Click on OK popup if there is a cascading effect on other files.
8. Clicking on Cancel button in popup will only make changes to the file and no other files.
9. Clicking on Cancel button will not make any changes
10. File status will be updated to C.
11. Job will become locked and Export will not be possible.
12. Click on Lock icon to unlock the Job for Export.
13. Only the user who modified the file can make further changes or any user with Administrator rights can do so.
14. To make further changes in other files or same file, repeat Steps 1-8.

Note: *When a record is updated in a file, that particular file will be exported whenever an Update export is performed.*

4.5 [Merge Jobs](#)

We can merge more than 2 jobs including the campaigns and create a new job with merged segment or independent segment from the dashboard view. The merging conditions are it should be of the same class, shape and presort.

We can select the new merge file name of our choice. We have an option of electing independent segment which would keep all the files segment separate from each other or we can select merged segment as well which will make one segment for the job

Note: Those jobs with same shape in segment record will be considered for merging's

4.6 Delete Record

To delete a single or multiple record in a file, perform the following steps:

1. Click on desired file on Job Details page.
2. Select one or more records.
3. Click on Delete link.

4. Click on OK button in confirmation popup.

5. Record(s) will be deleted.
6. File status would be updated to C if there is at least 1 record remaining.
7. Optional files can have all records deleted and thus would no longer contain any records on Job Details page.

8. For Update export, the deleted record would have status D.
9. HDR file would be updated with deleted record(s) count.

Note: *Following are some restrictions in record deletion:*

1. All records in mandatory file cannot be deleted.
2. In some file's records belonging to the same segment can be deleted only.

4.7 Validations

The validation section runs a validation action which check the records that exists in a job and display issues / error in this section. Upon clicking "Validate" button a valuation runs which check the records of all files.

4.7.1 Postal One

User can validate job as per PO! Validation by following these steps.

- Select Job → Validation → PO! Validation

User needs to click on a “*PO! Validate*” button. This will execute a validation check in a job.

- If any issue occurs then it will display in a form of grid.
- If there is no issue exists then no record will be displayed.
- User needs to re-click “*PO! Validate*” button every time after fixing mentioned issues.

4.7.2 Job Validation

This function checks the validation of job by checking the records entered in a file.

- Select Job → Validations → Job Validation

User can validate a job in three ways which are following.

- 1) PO Validation – This checks the job according to Postal One rules.
- 2) Seamless – This checks the job for Seamless requirements.
- 3) By/For – This checks the job for By/For data.

4.8 Modify

Job modification allows user to make changes in files of existing job. The actions performed in any of these features will impact the file records.

4.8.1 [Header](#)

A user can modify the header file by following these steps:

Select Job ID → Modify → Header

All the fields that container * at the end of the filed must be filled. The following fields are mandatory.

- Job Name / Title & Issue
- Contact Name
- Contact Email
- Original Software Vendor Name
- Original Software Version
- File Source
- Contact Telephone Number
- Mail.dat Presentation Category
- Original Software Products Name
- Original Software Version

4.8.1 [Manage CSM](#)

User can modify the CSM file by following these steps.

- Select Job → Modify → Manage CSM

User can view data as per following attributes.

- Pallets
 - Displays only pallets data.
- Loose Trays
 - Display the records having loose trays.
- Siblings
 - Sibling records displayed.
- View All

User can perform following actions in order to make modifications in CSM file.

1. Select any record from a grid.
2. Select any action from a given linked text.
 - a. CSM Edit
 - b. Unpalletized
 - c. Post. & Log Info
 - d. Transportation
 - e. Schedule
 - f. Label
 - g. Gen. Label
 - h. Add Siblings
 - i. Delete
3. Making changes in these records will impact all the files that are interlined with the CSM files.

4.8.2 MCR Management

User can modify the MCR records by following these steps.

- Select Job → Modify → MCR Management

User can edit the record by selecting any record from a grid and click on an *Edit* lined text. User can also delete the record by clicking on a Delete lined text.

4.8.3 [MPU & CPT Info](#)

It synchronizes the data modification of CPT, MPU and CSM file which contains fields that are inter-dependent on each other and will automatically get updated upon making changes in other fields.

To access this, select Job → Modify → MPU & CPT Info

User with admin rights can perform following actions:

1. Update data in the fields.
2. Add new values of CCR file.
 - a. Select Characteristics
 - b. Select Characteristics Type
3. Click on Add button to add values
4. Delete values
5. Click on Save button to save changes made

4.8.4 [SEG & Permit Info](#)

This module allows a user to modify information in the Segment (SEG) and/or Mailer Postage Account (MPA) file while also change the mapping of Mail Piece Unit (MPU) to MPA.

To modify desired information, perform the following steps:

Job Details page → Modify → SEG & Permit Info

Make updates in the record. Click on *Save* button. Note that clicking on *Cancel* button will not make any changes.

1. If any changes are made in the SEG section then only Segment file will be updated.
2. If any changes are made in the MPA section then only MPA file will be updated.
3. If the MPA Unique Sequence ID value is changed and Save button is clicked with or without making any modifications the only the MCR file will be changed.
4. Original Export will display updated values but with status O.
5. Updated Export will display new values but with status U for records.
6. Additional MPA could also be added to the primary MPA
7. Data of the Additional MPA could be edited via this feature

4.8.5 Containers

This feature allows users to select and perform multiple editing functions on records present in Container Summary (CSM) file and has some grouped functions which are not present in the individual file edit.

To access Container's menu:

- Navigate to Job Details page
- Click on Modify menu
- Click on Containers option
- User would be directed to Modify Containers page

A user can select what type of records in CSM file he / she wants to see displayed. On the very top of the Container Details page are display options:

1. **View by Pallet:** Shows Pallet records
2. **Include Loose Trays:** show loose trays records as well as Pallet records
3. **View All:** displays all the records in CSM file
4. **Postage and Logistics Information:** This feature allows users to make changes to certain CSM fields that pertain to Postage and Logistics information.

To modify record information, perform the following information:

- a. Select the desired view
 - b. Select desired records
 - c. Click on Postage and Logistics Information link
5. **Unpalletize:** User can unpalletize those trays which are palletize.

1. In case there is conflicting information, then that field would contain no value. If the user makes changes to that field, then updated value would be saved otherwise values would not be impacted
2. Click on Save button
3. User would be directed to Modify Containers page
4. Record status would be updated to U
5. File status would be updated to C

4.8.6 Schedule Management

Modifies the records of CSM file in order to update and split data at the same time.

- To access this, select Job → Modify → Schedule
1. Users with Admin rights are able to perform following actions:
 - a. Search for a particular record using container values.
 - b. Click on Save button to apply value for search.
 2. Click on Reset button to restore previous values.
 3. View records by Pallets
 4. Check or uncheck the checkbox in order to display the data containing Loose Trays.
 5. Edit records
 - a. Select a record by marking checkbox in a grid.
 - b. Click on Edit button
 6. Click Unpalletized to unpalletized the records.

The records can be edit by following these steps:

1. Check or uncheck the checkbox in order to apply changes to Palletize Trays Siblings
2. Click Save button to save changes made.
3. Click Cancel button to discard the editing process.

Note: *Fields shown as blank may contain different values for multiple records selected.*

4.8.7 Transportation Management

Modifies records of transportation to perform data modification.

- To access this, select Job → Modify → Transportation

User with Admin rights can perform following actions:

1. Search for a particular record using container values.
 - a. Click on Save button to apply value for search.
 - b. Click on Reset button to restore previous values.
2. View records by Pallets
3. Check or uncheck the checkbox in order to display the data containing Loose Trays.
4. Edit records
 - a. Select a record by marking checkbox in a grid.
 - b. Click on Edit button
5. Click Unpalletized to unpalletized the records.

The records can be edit by following these steps:

1. Check or uncheck the checkbox in order to apply changes to Palletize Trays Siblings
2. Click Save button to save changes made.
3. Click Cancel button to discard the editing process.

Note: *Fields shown as blank may contain different values for multiple records selected.*

4.8.8 [Label Management](#)

It allows to edit the information of the label to generate tray and pallet labels containing modified data in a one place.

To access this, Select Job → Modify → Label Management

User with Admin rights can perform following actions:

1. Search for a particular record using container values.
 - a. Click on Save button to apply value for search.
 - b. Click on Reset button to restore previous values.
2. View records by Pallets

3. Check or uncheck the checkbox in order to display the data containing Loose Trays.
4. Edit records
 - a. Select a record by marking checkbox in a grid.
 - b. Click on Edit button
5. Generate Labels

4.8.9 Split Job

This feature allows users to break a single Job into small Jobs. The new Jobs that are created can be given Job IDs by:

1. User input
2. AIMS generated unique ID based on Branch Settings.

Through the Split job functionality users can select single and multiple Containers with respect to:

1. Pallet
2. Loose Trays
3. Facility
4. Container Status
5. Transportation
6. MPU/CPT

To split a Job, perform the following steps:

1. Navigate to Job Details page
2. Click on Modify menu
3. Click on Split menu
4. Select desired view
 - a. View by Pallet: shows records with Pallet records displayed
 - b. Include Loose Trays: show loose trays records as well as Pallet records
 - c. View All: displays all the records in CSM file
5. Users can also filter records via Search option provided
 - Segment
 - Container Grouping Description
 - Container Status
 - Postage Grouping ID
 - Container Type
- Display Container ID
- Container Level
- Unique Container ID
- Entry Point for Entry Discount - Postal Code
- Container ID
- Entry Point for Entry Discount - Facility Type
- User Info Line 1
- Container Destination Zip
- User Info Line 2
- Display Cont. ID Range, Cont. ID Range

4.8.10 Split Job

1. Split Job via pallets and loose Trays

To split a Job by either Pallet or Loose Trays, perform the following steps:

1. Navigate to Job Details Page
2. Click on Modify menu
3. Click on Split menu. There must be least 2 containers or 2 loose trays in the Job
4. Select desired View:
 - a. View by Pallet
 - b. Include Loose Trays
5. Select desired records
6. Click on Proceed button
7. Select Job ID generation
 - a. AIMS automatically generated unique ID
 - b. Provide Job ID of 8 characters. (*Spaces and special characters not supported*)
8. Provide Job Name (optional) otherwise same Job Name will be kept
9. Click on Split button
10. User will be directed to new Job
11. If Leave a Copy option was checked then a copy of split records would remain with original
12. Clicking on Cancel would direct the user to Split Job page

2. Split Job via Facility and Container Status

Another way to split a Job is via View by Facility option which displays container records that are assigned to specific facilities and with their respective statuses.

This way, a user has multiple split options within this view.

To split a Job, perform the following steps:

1. Navigate to Job Details Page
2. Click on Modify menu
3. Click on Split menu. There must be least 2 containers or 2 loose trays in the Job
4. Click on View by Facility radio button
5. Select records via Container status
6. There are 2 ways to move further: View and Proceed
7. If the user decides to click on View button, then
 - a. Split Job page is displayed showing list of Containers from previous selection
 - b. User can filter containers via Search options
 - c. Select the desired containers and click on Proceed button
 - d. Preview of Split Job is displayed
 - e. Select Job ID generation
 - i. AIMS automatically generated unique ID
 - ii. Provide Job ID of 8 characters. (*Spaces and special characters not supported*)

- iii. Provide Job Name (optional) otherwise same Job Name will be kept
- 8. Click on Split button
- 9. User will be directed to new Job
- 10. If Leave a Copy option was checked then a copy of split records would remain with original
- 11. Clicking on Cancel would direct the user to Split Job page
- 12. If the user decides to click on Proceed button directly then
- 13. Select Job ID generation
 - b. AIMS automatically generated unique ID
 - c. Provide Job ID of 8 characters. (*Spaces and special characters not supported*)
- 14. Provide Job Name (optional) otherwise same Job Name will be kept
 - a. Click on Split button
 - b. User will be directed to new Job
 - c. If Leave a Copy option was checked then a copy of split records would remain with original
 - d. Clicking on Cancel would direct the user to Split Job page.

3. Split Job via Transportation

To split a Job by either Pallet or Loose Trays, perform the following steps:

- 13. Navigate to Job Details Page
- 14. Click on Modify menu
- 15. Click on Split menu. There must be least 2 containers or 2 loose trays in the Job
- 16. Select desired View:
 - a. View by Pallet
 - b. Include Loose Trays
- 17. Select desired records
- 18. Click on Proceed button
- 19. Select Job ID generation
 - a. AIMS automatically generated unique ID
 - b. Provide Job ID of 8 characters. (*Spaces and special characters not supported*)
- 20. Provide Job Name (optional) otherwise same Job Name will be kept
- 21. Click on Split button
- 22. User will be directed to new Job
- 23. If Leave a Copy option was checked then a copy of split records would remain with original
- 24. Clicking on Cancel would direct the user to Split Job page

4. Split by MPU/CPT

Another way to split a Job is via View by Component option which displays MPU & CPT records that are assigned to specific facilities and with their respective statuses.

This way, a user has multiple split options within this view.

To split a Job, perform the following steps:

1. Navigate to Job Details Page
2. Click on Modify menu
3. Click on Split menu. There must be least 2 containers or 2 loose trays in the Job
4. Click on View by Component radio button
5. Select records via Container status
6. Click on Split button
7. User will be directed to new Job
8. If Leave a Copy option was checked then a copy of split records would remain with original
9. Clicking on Cancel would direct the user to Split Job page
10. If the user decides to click on Proceed button directly then
 - a. Select Job ID generation
 - AIMS automatically generated unique ID
 - Provide Job ID of 8 characters. (Spaces and special characters not supported)
11. Provide Job Name (optional) otherwise same Job Name will be kept
 - a. Click on Split button
 - b. User will be directed to new Job
 - c. If Leave a Copy option was checked then a copy of split records would remain with original
 - d. Clicking on Cancel would direct the user to Split Job page.

4.8.11 [Add Pallet](#)

This feature allows a user to add Pallets to lose trays and other handling units other than Pallets in a Job. It will only make changes in the CSM file.

To add Custom Pallet(s) perform the following steps:

1. Navigate to Job Details page
2. Navigate to Modify → Add Pallet
3. Click on Modify → Add Pallet menu
4. All lose tray records will be displayed.
5. If there are no lose trays then no records would be available

A user can also filter records by using the following search filters:

- Segment
- Container Grouping Description
- Container Status
- Postage Grouping ID
- Container Type
- Display Container ID
- Container Level
- User Container ID
- Entry Point for Entry Discount - Postal Code
- Container ID
- Entry Point for Entry Discount - Facility Type
- User Info Line 1
- Container Destination Zip
- User Info Line 2
- Container ID Range

1. Enter Container ID values then click on Search button.
2. Select the desired lose trays by checking the checkbox against the records.
3. Select / enter information in the Pallet Details grid
4. Click on Add Pallet button
5. The selected lose trays record(s) would be assigned to that Pallet record and no longer displayed in the grid.

6. Clicking on Cancel button would not make any changes.
7. On Original Export the newly added Pallet record would be present and all the associated trays would be linked with it with status O.
8. On Updated Export, the newly added Pallet record would be present and all the associated trays would be linked with it with status U.

4.8.12 Add Sibling

This feature allows users to Add Sibling records for loose containers as well as Pallets. Its impact is on the Container Summary (CSM) file only and has no cascading impact in any other file. Add Sibling feature is available for both Presort and MLOCR Jobs. Multiple siblings can be added against multiple containers of same container type.

To add Sibling Container(s) for Presort Jobs, perform the following steps:

1. Navigate to Job Details Page
2. Click on Modify menu
3. Click on Add Sibling menu
4. User will be directed to Add Sibling Page
5. Select one or more containers of same container type
6. Click on Add Siblings Containers link

A pop-up screen will be displayed. Choose the Container Type for the sibling to be create. Click on *Add* button.

1. Sibling record will be added
2. Newly created siblings will be shown in the same pop-up for viewing information
3. Clicking on Cancel button will not add a new Sibling record
4. Sibling record will be inserted in CSM with record status I
5. In Original Export, the HDR file will contain updated CSM record count

6. In Update Export, the HDR file will contain updated CSM record count with Sibling record status as
I

1. **Add Sibling in MLOCOR Jobs**

For MLCOR Jobs, Sibling records can be created in two ways:

1. Import Scan file in txt format
2. Using Add Sibling tab

To add Sibling records via import file, perform the following steps:

1. Navigate to Job Details Page
2. Click on Modify menu
3. Click on Add Sibling menu
4. Click on Import Scan file tab
5. Browse the .txt file from specific location.
6. Click on Upload button.
7. Scan file successfully uploaded and the summary information will be displayed
8. User will be directed to the Add Sibling tab automatically
9. Clicking on Cancel button will not upload the file and record(s) would not be added
10. User will be navigated to the import scan file tab for new .txt file selection.

If there is at least 1 Sibling record in an MLOCOR Job then Sibling records can be added via Add Sibling tab. To do so, perform the following steps:

1. Navigate to Job Details Page
2. Click on Modify menu
3. Click on Add Sibling menu
4. There must be at least 1 Sibling record already added in the Job
5. Click on Add Sibling tab
6. Select number of desired records
7. Click on Add Sibling Containers link
8. Select Container Type
9. Click on *Add* button.
10. Sibling records added and shown in popup for information.

11. Click on *Close* button.
12. Against original record, count is increased under Number of Physical Containers column.
13. Sibling record will be inserted in CSM with record status I.
14. In Original Export, the HDR file will contain updated CSM record count.
15. In Update Export, the HDR file will contain updated CSM record count with Sibling record status as I.

4.8.13 Recalculate Pieces

This feature allows users to correct the dimensions and piece counts in a Job.

For dimensions correction, the following are impacted in MPU and CSM files:

1. Weight is driven from CPT file and then summed in MPU.
2. Number of Pieces in PQT are then multiplied with MPU Weight and value is placed in Total Weight Product Only field in CSM file.
3. Length, Width and Thickness in CPT are copied into MPU file same fields.
4. If a piece file is present then Number of Copies and Number of Pieces in PQT, CQT and CSM files is derived from records in the piece file.
5. If piece file is not present, then Number of Copies and Number of Pieces is derived from PQT file and change is made in CQT and CSM files.

Note: *This feature can automatically run at import time if the configuration is enabled.*

4.8.13.1 Recalculate Pieces

To perform re-calculation of piece and copies count, perform the following steps:

1. Navigate to Job Details page.
2. Click on Modify menu.
3. Click on Re-calculate Pieces menu.
4. Click on Re-calculate Piece Count and Weight button.
5. If there are one or more discrepancies in piece counts then message will be displayed.
6. Click on *Fix & Update* button.
7. Piece counts would be corrected in respective files
8. For Original Export, the piece counts would now be corrected in PQT, CQT and CSM files
9. For Update Export, the HDR file would contain update status for PQT, CQT and CSM files and record status in each of the files would be U

4.8.13.2 Calculate Mail.dat for Mail Piece Dimensions

To correct the weight and dimension of Component, Mail Piece and Container(s) in a Mail.dat Job, perform the following steps:

1. Navigate to Job Details page
2. Click on Modify menu
3. Click on Re-calculate Pieces menu
4. Click on Re-calculate Piece Count and Weight button
5. If there is one or more discrepancies in weight or dimensions in any of the files then message will be displayed

Recalculate Pieces

1. Click on Fix & Update button
2. Weights and dimensions would be corrected accordingly where discrepancies were present

Calculate Mail.dat piece dimensions

1. For Original Export, the weight and dimensions would now be corrected in MPU and CSM files
2. For Update Export, the HDR file would contain update status for MPU and CSM files and record status in each of the files would be U.

4.8.14 [CQT & PQT Info](#)

It synchronizes the data modification of CQT/PQT file so that the fields which are inter dependent will automatically get updated when changes made in a data.

- Select Job → Modify → CQT & PQT Info

Users with admin rights can perform following actions:

1. Edit the data of CQT file.
2. Edit the data of PQT file.
3. Click on Save button when done with the changes.
4. Click on Cancel button to discard the editing of data.

4.8.15 [Spoilage](#)

To By using this screen we can mark the spoilage in the job with the help of CSV file. We can upload the CSV file and it would mark the pieces according to the data provided in the file.

4.8.16 [Add MPA](#)

To By using this screen we can Add a new MPA to the MPA file. We would have to enter the mandatory fields after selecting the “Postage Payment Method” for Stamps and Permit.

Once required data is entered, we need to press the Add button so that we can move to the next process of connecting the MCR in the same page.

Once the mandatory fields are added to the MCR section we can save the recorded by using the SAVE button and our new MPA would be added to the job.

4.9 Generate

These set of features allow users to generate forms and barcodes for respective Mail.dat Jobs. These functions do not have any cascade affect and only impact CSM or piece files (PDR or PBC when Barcode functionalities are used)

4.9.1 Barcode

The functionalities under Barcode feature are only applicable for a Job that meets the following conditions:

1. Full-Service Indicator has value F or M in Segment file.
2. There is at least 1 barcode for handling units.
3. There is at least 1 barcode in piece file (PDR or PBC).

The Barcode functionalities allow users to:

1. Generate IMcb(s) for pallet(s)
2. Re-sequence IMtb for handling units
3. Re-sequence IMb(s) for piece file.

4.9.2 Generate IMcb

To generate IMcb(s) for Pallet records along with the conditions defined above; there must be at least 1 Pallet record in the Job.

To generate IMcb(s), perform the following steps:

Select Job ID → Generate → Barcode → Generate IMcb (tab)

1. Select the desired Segment ID from Segment dropdown
2. Filter records (if needed) by using any of the following search filters
3. Select desired records checkbox or click on Select All Containers button
4. Click on Generate Barcode link
5. Click on Generate Barcode button

6. Select desired Mailer ID as configured in Manage Branches.
7. New IMcb(s) value(s) would be generated.
8. The sequence number for that Mailer ID in the Branch as defined in Section 1.1.3 would have its count incremented by the number of IMcb(s) generated.
9. Record status in CSM files would be set to U.
10. Clicking on Cancel button would have no impact.

For Original Export: The new updated IMcb(s) value(s) would be seen against the respective Pallet(s) record(s).

For Updated Export: The HDR file would have CSM file status as C and records in the CSM file would have status.

4.9.3 Re-Sequence IMtb

Unlike an IMcb, AIMS do not generate brand new IMtb values but rather modified the IMtb value with Mailer ID and Sequence Number.

The additional conditions for IMtb generation are that there must be at least 1 IMtb record against the handling unit. If there are no IMtb records in CSM file then this tab would not be accessible by the user.

To re-sequence IMtb, perform the following steps:

Select Job ID → Generate → Barcode → Re-sequence IMtb (tab)

Then follow these steps.

1. Select desired Segment ID from Segment dropdown.
2. Filter container records if needed from Search.
3. Select desired records checkbox or click on Select All Containers button.
4. Click on Re-sequence Barcode link.
5. Select Mailer ID from dropdown.

6. Select desired Segment ID from Segment dropdown.
7. Filter container records if needed from Search.
8. Select desired records checkbox or click on Select All Containers button.
9. Click on Re-sequence Barcode link.
10. Select Mailer ID from dropdown.
11. Click on Re-sequence Barcode button.
12. IMtb(s) against selected handling unit(s) would be re-sequenced containing selected Mailer ID and Serial Count.

13. Record status in CSM files would be set to U.
14. Clicking on Cancel button would have no impact

For Original Export: The new updated IMtb(s) value(s) would be seen against the respective container(s) record(s).

For Updated Export: The HDR file would have CSM file status as C and records in the CSM file would have status U.

4.9.4 Re-sequence IMb

Similar to IMtb Re-sequencing, IMb(s) are also re-sequenced and have the same set of conditions for Segment Full-Service Participation Indicator field but require that at least 1 IMb be present in the respective piece file (PDR or PBC). If there are no IMb records in CSM file then this tab would not be accessible by the user. To Re-sequence an IMb, perform the following steps:

Select Job ID → Generate → Barcode → Re-sequence IMb (tab)

1. Select desired Segment ID from Segment dropdown
2. Filter piece records if needed from Search
3. Select desired records checkbox or click on Select All Mail Pieces button
4. Click on Re-sequence Barcode link
5. Select Mailer ID from dropdown
6. Click on Re-sequence Barcode button

IMb(s) against selected containers would be re-sequenced containing selected Mailer ID and Serial Count.

1. Record status in CSM files would be set to U
2. Clicking on Cancel button would have no impact

For Original Export: The new updated IMtb(s) value(s) would be seen against the respective container(s) record(s).

For Updated Export: The HDR file would have CSM file status as C and records in the CSM file would have status U.

4.9.5 Manage Barcode

AIMS allows user to manage barcodes directly from this screen.

Select Job ID → Generate → Manage Barcode

This screen contains a grid which holds the values of MID and Serial Number. User can perform following actions:

1. Barcode Type selection
 - a. IMcb
 - b. IMtb
 - c. IMB
2. Modify MID
3. Modify Serial Number
 - a. Start
 - b. End
4. User needs to select a record in order to modify the data.

User needs to modify the MID by selecting a record from a given grid. Update fields as per required.

Modify the fields desired fields and click “Modify Serial”. It will save the updated record.

4.9.6 Labels

Users can generate Labels for handling units and pallets via this feature which can be done in 2 ways:

1. Labels menu from Generate section.
2. Using Labels link in Container Summary file.

The fields which are printed on Labels are as follows:

- Label: Destination Line 1
- Label: Destination Line 2
- Label: Contents Line 1
- Label: Contents Line 2
- Label: Entry (Origin) Point Line
- Label: User Information Line 1

- Label: User Information Line 2
- Label: Container Label CIN Code
- Label: IM™ Container Barcode or IM™ Tray Barcode

4.9.7 Label Printing from Generate Menu

To generate Labels for handling units and pallets, perform the following steps:

Select Job ID → Generate → Labels

1. Select Generate IMtb Labels checkbox for handling unit(s) label(s).
2. Click on Generate Labels button.
3. PDF file would be downloaded. Open the PDF document via any PDF viewing software to view labels printed.

1. Select IMcb checkbox for pallet(s) label(s) and click on Generate Labels button. If there are no Pallets then this option would be disabled.
2. PDF file would be downloaded. Open the file in any PDF viewing software to view labels printed.
3. Label fields are then filled out in CSM file.
4. **For Original Export:** The label fields in CSM file will be populated.
5. **For Updated Export:** The label fields would be populated for all handling units that met the label printing conditions with record status U.
6. There is no impact in HDR file for this functionality.

4.9.8 Label Printing from Container Summary File

Labels can be printed when viewing the Container Summary file. To do so, perform the following steps:

Select Job ID → Modify → Manage CSM

Select desired containers (filter if needed) and click on Generate Labels link.

1. Choose which type of labels to be printed based on selection.
2. If Tray or Sack is selected then the Intelligent Mail Tray Barcode (IMtb) option is enabled or if a Pallet is selected then the Intelligent Mail Container Barcode (IMcb) option is enabled.
3. Check the desired selection and click Proceed button.
4. If both options are checked then 2 label files would be downloaded in zip format. Extract the zip file first.
5. If only one option is selected then label file in PDF is downloaded.
6. Click on Close button once done.
7. Labels are downloaded in the PDF file and can be viewed using any PDF viewing software.

4.9.9 Custom Labels

Users can generate Labels for handling units and pallets via this feature which can be done in 2 ways:

3. Labels menu from Generate section.

4.9.10 Postage

This feature is available for Mail.dat 17-1 and above version jobs that meets the below criteria

- Mail class standard
- Mail shape Letter or Flats

Postage statement will be generated for following container statuses only

1. Preliminary (P)
2. Ready to Pay (R)
3. Original (O)
4. Not closed
5. Transportation update
6. Paid (X)

While no postage statement will be generated for Container statuses

1. Cancel (C)
2. Delete (D)

4.9.11 Selection View

There are following display options on Generate Postage page.

1. **View by Pallet:** Shows pallets records
2. **Incl Loose Trays:** (This option is present with view by pallet option) it will display both pallets and loose tray records.
3. **View by Loose Trays Only:** display loose tray records only.

4. **View by Facility:** Display records with respect to facilities

4.9.12 Generate Postage

This feature allows user to Generate Postage for standard letters or flats jobs, by default Postage for all the containers is generated, but user can generate postage for selected containers as well

To generate postage for selected containers, follow the steps defined below

1. Navigate to Job Details page
2. Click on Generate menu.
3. Click on Postage link.
4. Select desired containers
5. Click Generate button.
6. Clicking on generate button will generate postage for the selected containers only.

Note: Postage will be generated with respect to Postal Service Technical Specification rules and all the rates will be as per notice 123.

Postage for selected containers will not be saved and if user comes back to postage page it will show postage for all containers to save postage for selected containers

1. Click on *Save* button.
2. Clicking on save button will save generated postage for selected containers and insert it on PS dashboard.
3. Those selected containers will be disabled after saving postage.
4. User can generate and save postage for remaining containers.

Note: Unique Postage View ID will be generated for each statement.

Note: User can generate and save multiple Postage statements.

4.9.13 Search Containers

User can search any container by using following search criteria:

1. Container ID

2. Container Type
3. Destination Zip
4. Container Status
5. Display Container ID
6. Container Level
7. Locale Key
8. Postage Mailing Date
9. Entry Zip
10. CSM ID Range

4.9.14 View Postage

To view Postage, follow below defined steps:

1. Navigate to Job Details page
2. Click on Generate menu.
3. Click on Postage link.
4. Click on Postage View ID link present in Postage View grid.
5. Clicking on Postage View ID link will open page.

4.9.15 Export Postage

User can Export Postage Statement from

1. Postage View Grid
2. From Postage Page

Postage statement can be exported in Excel file or in pdf file, to export Postage from postage View grid follow the steps defined below:

1. Navigate to Job Details page
2. Click on Generate menu.
3. Click on Postage link.
4. Click on Excel icon / Pdf icon to export Postage.
5. Postage statement will be downloaded on user's computer

To export Postage from Postage page, follow the steps defined below:

1. Navigate to Job Details page
2. Click on Generate menu.
3. Click on Postage link.
4. Click on Postage view ID link.
5. Click on Export to Excel/save as PDF button.
6. It will Download postage in Excel/Pdf file.

4.10 [Manage Campaigns](#)

This feature is only available for Mail.dat 17-2 and above version Jobs that meet the following criteria:

4. Mail Class is of Standard or First Class
5. Mail Shape is of Letters or Flats
6. There is at least 1 IMb in the piece file

4.10.1 [Summary Info](#)

The first file for a Campaign is the Referenceable Mail Summary Record (RMS) file. This feature allows the creation, modification and removal of Referenceable Mail Summary Record (RMS) file in the Job.

4.10.2 [Add](#)

User needs to follow these steps to perform in order to update Summary Info records.

- Select Job → Manage Campaigns → Summary Info

If there is no existing RMS record then Generate RMS file page would be displayed. Otherwise, existing RMS records would be displayed. User needs to select a record and then click on a “Add” link on the top of a grid.

3. Click on *Save* button.
4. User would be directed to RMS File page where record would be displayed.
5. In Original Export, the HDR file would now contain information about RMS file and count of records.
6. In Update Export, the HDR file would now contain information about RMS file and count of records with record status as I.

4.10.3 [Edit](#)

To modify information about an existing RMS record, perform the following:

- Select Job → Manage Campaigns → Summary Info

User can select one or multiple records via checkbox.

1. Click on Edit button.
2. Make desired changes and click on *Save* button.
3. Records would be modified accordingly.
4. **For Original Export:** Updated fields would be seen in exported RMS file.
5. **For Update Export:** The HDR file would contain status C for RMS file and the status of records in RMS file would be U.

4.10.4 [Delete](#)

The Delete functionality allows the removal of RMS / RMB and its subsequent RMR/ RMB records. If the user decides to Delete an RMS record, then all associated RMR/ RMB records will be de-linked accordingly.

To Delete an RMS record, perform the following:

- Select Job → Manage Campaigns → Summary Info

Select one or multiple records via checkbox and click on *Delete* button. A pop-up will prompt with following options.

1. Click on OK button to delete.
2. Click Cancel button to discard changes.

4.10.5 Mail Info

This feature allows a user to create, modify and remove Component or Piece Barcode (PBC) / Piece Detail Records (PDR) with a Campaign created in Summary Info. To access this, feature the following conditions must be met:

1. There must be at least 1 record in Summary Info (RMS file).
2. There must be at least 1 barcode in PDR or PBC file.

4.10.6 Add Mail Info Record

To add a new RMR record, perform the following steps:

- Select Job → Manage Campaigns → Mail Info → Add Mail Info Record

User will be directed to Not Linked tab where all Piece or Component records that have not been linked to a Campaign would be displayed.

1. Select how to create linkage via Component or Piece Records.
2. Once a single record has been linked then for subsequent linking, it cannot be changed unless all linked records are deleted first.
3. Select one or more records via checkbox.
4. Click on Add Referenceable Mail Record link.
5. Enter desired information the popup.

6. Click on Add button.
7. Records that were selected would now be displayed in the Linked tab.
8. On successfully linking records the Referenceable Mail Record file would be created in the Mail.dat Job.
9. For Original Export, the HDR file would contain RMR file information and record count
10. For Updated Export, the HDR file would contain record status C for RMR file and record status would be I in RMR file.

An error message will be displayed if there is no record found in the Lined RMR tab.

4.10.7 Add Mail Info Record

To modify information about one or multiple records perform the following steps:

- Select Job → Job Details → Select Referenceable Mail Record

User can select one or more records checkbox.

7. Click on Edit link.
8. Update desired information.
9. Click on Save button.
10. User would be directed to Mail Info page where modified values would be displayed.

- **For Original Export:** There would be no update in HDR file
- **For Updated Export:** The HDR file status would be C and new information would be present in RMR file with record status U.

4.10.8 Delete Mail Info Record

RMR records can be deleted in two ways:

1. From RMR file via File details page.
2. From Linked tab in Mail Info

Delete RMR Record from File Details

To delete an existing RMR record, perform the following steps:

- Select Job → Job Details → Select Referenceable Mail Record

5. Select one or more records checkbox.
6. Click on Delete link.
7. Records would be deleted.
8. **For Original Export:** The count of records in RMR file would be reduced.
9. **For Updated Export:** The count of records in RMR file would be same but deleted records would have record status D.

Delete RMR Records from Lined Tab

To delete RMR Records from Mail Info Linked tab, perform the following steps:

- Select Job → Manage Campaign → Mail Info

1. Click on Linked tab.
 2. Select desired records checkbox and click on Delete link.
 3. Click on OK button in confirmation popup.
 4. Records are moved to Not Linked tab.
- **For Original Export:** The count of records in RMR file would be reduced.
 - **For Updated Export:** The count of records in RMR file would be same but deleted records would have record status D.

4.10.9 [Generate RMB](#)

The RMB can be generated by importing CSV file.

Using CSV File Import

To generate RMB records using CSV file perform following steps:

1. Navigate to Job Detail.
2. Click on Campaign menu.
3. Click on Generate RMB link.
4. Enter / Select data from RMB Details grid
5. Click Import CSV File tab.
6. Select CSV file which should only contain IMb values that are present in the Job.
7. Click Upload button.
8. Matching IMb count and /or mismatching IMb count with values would be displayed
9. Duplicate and invalid barcodes will be displayed in Duplicate/invalid IMb(s) list.

10. To export invalid IMBs click CSV file icon, it will export all duplicate and invalid IMBs in CSV file.
11. Click Generate button.
12. User would be directed to RMB File page where newly added records would be displayed.
13. RMB file is not exported with Original Export. It is only available via Campaign Export option.

Once RMB records are generated, then further records can be added from File Details page by clicking on Referenceable Mail Record link and repeating Steps 4 to 10.

4.10.9.1.1 Edit RMB Record

To modify an existing RMB record perform the following steps:

1. Navigate to Job Details page.
2. Click on Referenceable Mail Record file link.
3. Select one or more RMB records.
 - a. Filter records if needed from Search options.

4. Click on Edit button.
5. Make the desired changes.
6. Click on Save button.
7. User would be directed to RMB File page where modified records would be displayed.
8. Clicking on Cancel button would not make any changes
9. RMB file is not exported with Original Export.
 - a. It is only available via Campaign Export option.

4.10.9.1.2 Delete RMB Record

To delete one or more records, perform the following steps:

1. From File Details page click on RMB file link.
2. Select desired records. Filter records via Search if needed.
3. Click on Delete link.
4. Click on OK button in popup.

User would be directed to Referenceable Mail Barcode file page where deleted records would no longer be displayed.

4.11 Seamless Acceptance

User can perform Seamless Acceptance actions in this section. This section works around Barcodes.

4.11.1 Validations

User can validate a job by following these steps.

Select Job → Modify → Seamless Acceptance → Validation

User needs to click on a “Re-validate” button in order to check if the job is validated or not. User can download the list in excel format. Clicking on a “Details” button will display the details of an error along with piece ID, error code and error description.

This detail can be download in a form of excel sheet. User can search a particular record from a search panel.

4.11.2 Delivery Point Validation

AIMS allows user to verify delivery point in a job. To access the Delivery Point Verification;

Select Job → Seamless Acceptance → Click on “Validate” button.

4.11.3 IMb Verify

In order to verify the unmatched IMB, user needs to perform these steps.

- Select Job → Modify → Seamless Acceptance → IMB Verify

Figure 162 - Unmatched IMb Barcode

User needs to upload a CSV file in order to run a check for a unmatched Imb barcode. The records displayed can be gets downloaded in an excel format.

4.11.4 IMtb/IMcb Verify

User can have check for a unmatched IMtb and IMcb barcode by following these steps.

- Select job → Modify → Seamless Acceptance → Unmatched IMtb / IMcb Barcode

This result file can be download in an excel format.

4.11.5 Duplicate IMcb

User can check duplicate IMcb by following these steps.

- Select Job → Seamless Acceptance → Duplicate IMcb

Figure 164 – Duplicate IMcb Barcode

The list of all the duplicate IMcb exists appear in a form of grid and following information will ne display.

- Sn o.
- Job ID
- Revision No.
- AIMS ID
- Barcode
- Duplicate Container Count

4.11.6 Duplicate IMtb

User can check duplicate IMcb by following these steps.

- Select Job → Seamless Acceptance → Duplicate IMtb

Check marks the Search MID and Serial checkbox.

The list of all the duplicate IMcb exists appear in a form of grid and following information will ne display.

- Sn o.
- Job ID
- Revision No.
- AIMS ID
- Barcode
- Duplicate Container Count

4.11.7 Duplicate IMb

Each Mail Piece should have a unique Intelligent Mail barcode (IMb). AIMS allows users to remove duplicate barcode (IMB) from mailings so as to get correct number of mail pieces in their mailings and calculate the price accurately.

This functionality only impacts the piece file within the Job (either PDR or PBC) and if there is no piece file present then this feature is disabled.

To remove duplicate IMb(s) perform the following steps:

1. Navigate to Job Details page
2. Click on More menu
3. Click on Duplicate IMb menu
4. List of duplicate IMb(s) would be displayed with count of number of duplicates
5. Click on Remove Duplicate IMb & Sync Job button

6. Duplicates would be removed
7. Only piece file would be updated
8. In Original Export, there would be no change in piece file (either PDR or PBC) record count
9. In Update Export, the piece file status would be updated in HDR file and record status would be U for every individual record

Figure 166 - Duplicate IM Barcode

4.11.8 STID

To update Service Type Identifier (STID), perform the following steps:

1. Navigate to Job Details page
2. Click on More menu
3. Click on STID menu
4. Select value from Segment ID dropdown
5. Click on checkbox against STID records to be updated
6. Click on Update STID link

7. Select value from dropdown
8. Click on Save button
9. All piece file records belonging to the selected segment would have respective STID values updated in IMb field.
10. For Original Export, there would no update of any kind in any file.
11. For Update Export, the HDR file would have record status C for piece file (PDR or PBC in the Job) and record status U for all records in the respective piece file.

4.11.9 Manage By/For

The By/for Management can be performed by following these steps.

- Select Job → Seamless Acceptance → Manage By/For

User can perform edit and delete action by selecting any record from a grid.

- Once the status checks completed then it will get saved in a MCR file.

Duplicate IMb STID

User can check duplicate IMb STID by using this page. This functionality only impacts the piece file within the Job (either PDR or PBC).

4.12 Palletization

AIMS allows users to create pallets using the Palletization module. This module has 3 types of features:

1. **Palletize:** This screen shows us the available loose tray to be palletized and template selection.
2. **Import CSA:** CSV upload screen.
3. **Pallet template:** Design your own template as per your requirement.

4.12.1 Palletize

This Module enable us to create new pallets on all available loose trays if the proper conditions are met in the set template. It gives us the proper break down of how many pallets would be made and for what would be the sort level for them

Once you click the update mail.dat button the new pallets would be added to the job and would be visible through the CSM table.

We can also change the selection of the template from the drop-down menu and use different templates to meet different requirements.

4.12.2 Import CSA

This Module enable us to import a CSA so that palletization could be performed through CSV file which has all the important data in the correct format.

4.12.3 Pallet Template

This screen enables us to make multiple templates for pallets according to our needs. Once we have made templates, we can select the template which we want to be available during palletization.

We can copy a template which the help of copy button to make a duplicate template. With the help of edit button we can edit any available template

We can customize the template by selecting or de-selecting any sort level we want to palletize.

By clicking save button all the changes would be saved in the new template or if have edited an existing template it will update the named template.

4.12.4 FCM Template

We can set up FCM template as well

By clicking ADD button we can add a new template

once all the required data is entered, we can add a new recorded by the plus sign then save it so that this template could be used when required.

4.13 Export

AIMS allows users to export Jobs in zip file formats for submission to PostalOne! or for other uses. There are 3 types of Export features:

1. **Original:** All files present in the Job that are supported by AIMS at time of import.
2. **PostalOne!** Job is sent to PostalOne! hot folder for immediate submission.
3. **Campaign:** Only HDR, RMS and RMB files are exported.

4.13.1 Mail.dat

This Export functionality allows users to only export Mail.dat files to their local system or on a networked drive. It does not include support for RMB file.

Original Job

To Export a Job as Original containing all Mail.dat files in the Job, perform the following steps:

1. Navigate to Job Details page
2. Click on Export menu
3. Click on Mail.dat link
4. Select whether to export with
 - a. Job ID present in the Job or
 - b. AIMS assigned unique ID
5. Click on Original Job radio button
6. Click on Export Job button
7. Zip file will be downloaded in a few minutes depending on size of data
8. Exported job would be in ZIP format, the user can open the zip formatted file or save the export zip file in the specified location.

All records will be exported with record level status O. All file level status will be O; files not present will have status N with record count 0. User can rename the file before an export.

Deleted Job

This option allows users to Export a Delete transaction for PostalOne! submission and would only include the HDR and SEG file with no other files present.

o Export a Delete transaction, perform the following steps:

1. Navigate to Job Details page
2. Click on Export menu
3. Click on Mail.dat link
4. Select whether to export with
 - a. Job ID present in the Job or
 - b. AIMS assigned unique ID
5. Click on Deleted Job radio button
6. Click on Export button
7. Zip file will be downloaded in a few minutes depending on size of data
8. Exported job would be in ZIP format, the user can open the zip formatted file or save the export zip file in the specified location.

4.13.2 Cont. Mailing

This feature allows us to send mailing to Postal One with an option of modification from the same screen.

We can view the job details on the top half of the page which gives us the information about the job which is submitted to PostalOne.

We can view all the available containers in the job and can filter results from the search menu. In the search menu we have a range filter for Display Cont ID and Cont ID.

We can filter these results on Pallets or on Loose Trays.

We can filter the results from the range selection also which allows us to filter out the required containers for postage calculation and PO submission.

The selected records could be edited from the edit button.

We can generate postage on the selected containers and save them before sending them to PostalOne.

The saved postage can be downloaded in Excel format or PDF same as the postage module.

We can export the file on a new cont. Status once the postage is saved for the selected containers. is open for further submission and editing.

4.13.3 Postal One!

This feature allows user to Export imported job to Postal One. To use this feature Postal batch Settings must be configured and postal file location settings must be defined on applications web.config file.

PostalOne! File Location" in 'Web.config' and 'PostalOne! Batch Tool settings should be same.

4.13.4 Original Job

To export Job as Original containing all Mail.dat files in the Job, perform the following steps:

1. Navigate to Job Details page
2. Click on Export menu
3. Click on Postal One! Link.
4. Set container status from dropdown.
5. Click PO! Export button.
6. Zip file will be Exported to the Postal One! Export Folder.
7. All records will be exported with record level status O. All file level status will be O; files not present will have status N with record count 0.

8. All the containers will be exported with Selected container status (P or R).

Once the job is exported successfully it will show job status as in progress and PO! Export button will become disabled. After successful upload of job on Postal one! PO! Export screen will display. If job is failed during client validation it will show message as shown in figure and job will become available for export again so that user can fix issues and export job again.

After successful upload of job on Postal one! PO! Export screen will display.

4.13.5 Update

This option will only available after successful upload of Original job on Postal one! User can export update directly by selecting container from PO! export screen or from detailed Container screen. To Export a Job as an Update from PO! Export screen shown in figure 2.6.2.2 perform the following step

1. Navigate to Job Details page
2. Click on Export menu
3. Click on Postal One! Link.
4. Check the checkbox against desired container status.
5. Set container status.
6. Click PO! Export button.

Note: User can export update for the next allowed statuses only else it will show error message and job will not export.

To export Job as an Update from PO! Export detail page; perform the following steps

1. Navigate to Job Details page
2. Click on Export menu
3. Click on Postal One! Link.
4. Check the checkbox against desired container status
5. Click View which will re-direct user to the detailed view of selected containers.
6. Select containers.
7. Set container Status (Ready to pay (R), Transportation (T), cancel (C), Paid (P))
8. Click PO! Export button.
9. Zip file will be Exported to the Postal One! Export Folder.
10. All the containers will be exported with record files status as 'U' and file status as 'C'.
11. All the containers status will be updated in CSM file as well.
12. Clicking on *Back* button will redirect user to the main screen.

Note: Only next allowed container statuses will be present in drop down on detailed containers page.

After successfully exporting update, in progress containers will not be available for further update until its client validation /server validation is completed depending on the branch settings. Once the PO! Submission is completed then it will update containers count and containers will become available for further update.

Note: Only successful containers count will be updated against the respective container statuses in grid.

4.13.6 Include Spoiled / Wasted / Short Pieces

PO! Export feature also allow user to mark spoiled, wasted and short pieces while exporting update.

user can only mark and export spoiled/wasted short pieces with Ready to pay containers in update transactio

To export spoiled/wasted/short piece with mail.dat file check the Include Spoilage / Wasted or Shortage Piece check box while exporting job.

4.13.7 Delete Job

PO! Export feature allows user to export delete job, delete job option will be available

1. When Original job is successfully uploaded on PostalOne! with Preliminary container status.
2. Original job with container status (P or R) is failed at server validation.

For server validation Failed original jobs user will be redirected to PostalOne! Export page. A message and Delete button will be present on Postal one Export page.

Note: *When an Original Job is failed at server validation only delete option is available for that job and user cannot Export any update for such job until delete transaction is successfully exported.*

To Export delete transaction for job uploaded successfully with preliminary container status, perform the following steps:

1. Navigate to Job Details page
2. Click on Export menu
3. Click on Postal One! Link.
4. Click on Send Delete Transaction button.
5. It will export only Header and Segment file.
6. All files and record status will be 'D'.

After successful completion of delete transaction job will become available for Export again.

Note: When PO! Submission for delete transaction is in progress user will not be able to send any other transaction of same job if user tries to export any transaction it will show message.

4.13.8 Campaign

This feature only allows Export of Campaign files supported by PostalOne! thus, only the following files are exported:

1. HDR
2. RMS
3. RMB

4.13.9 Original

To export Campaign supported files, perform the following steps:

1. Navigate to Job Details page
2. Click on Export menu
3. Click on Campaign link
4. Select whether to export with
 - a. Job ID present in the Job or
 - b. AIMS assigned unique ID
5. Click on Original radio button in Transaction Type section
6. Click on Export Campaign button
7. Zip file will be downloaded in a few minutes depending on size of data
8. Exported job would be in ZIP format, the user can open the zip formatted file or save the export zip file in the specified location.
9. All records will be exported with record level status O. All file level status will be O; files not present will have status N with record count 0

4.13.10

Delete

This option allows users to Export a Delete transaction for Campaign submission and would only include the HDR, RMS and RMB file with no other files present.

To Export a Delete transaction, perform the following steps:

1. Navigate to Job Details page
2. Click on Export menu
3. Click on Mail.dat link
4. Select whether to export with
 - a. Job ID present in the Job or
 - b. AIMS assigned unique ID
5. Click on Deleted Job radio button
6. Click on Export button
7. Zip file will be downloaded in a few minutes depending on size of data
8. Exported job would be in ZIP format, the user can open the zip formatted file or save the export zip file in the specified location.

4.14 More

These functions do not have any impact of Mail.dat Jobs when it comes to the final Export in any regard. They operate within AIMS and work only when a Job is unlocked.

4.14.1 Downgrade Job

AIMS allows user to downgrade a Job from a higher Mail.dat version to a lower Mail.dat version.

To downgrade a Job, perform the following steps:

- a. Navigate to Job Details page
- b. Click on More menu
- c. Click on Downgrade Job

4.14.2 Upgrade Job

AIMS allows users to upgrade a Job from a lower Mail.dat version to a higher Mail.dat version.

To upgrade a Job, perform the following steps:

1. Navigate to Job Details page
2. Click on More menu
3. Click on Upgrade Job link
4. Select desired Mail.dat version. Job would be upgraded to selected Mail.dat version
5. User would be directed to Upgraded Job Details page
6. We can click the checkbox and keep only the newer version job after the upgrade

Note: It is advised to upgrade sequentially rather than skipping Mail.dat versions to avoid any data issues.

4.14.3 Copy Job

This function allows a user to make an exact copy of an existing Mail.dat Job with all current records and file statuses. The Job ID that will be assigned will be of Mail.dat and a new unique AIMS ID as configured.

To copy an existing Mail.dat Job, perform the following steps:

1. Navigate to Job Details page
2. Click on More menu
3. Click on Copy link
4. Select in which Branch is the replica Job to be made
5. New Job ID would be displayed on top of the page

To navigate to the new Job user needs to click on Job ID link. On the Job Details page of new Job would be the Parent Job ID and newly assigned unique AIMS ID.

Note: There is no limit to the number of copies that can be made within AIMS. The only limitation is the database space storage.

4.14.4 Delete Job

To delete a Job in AIMS, perform the following steps:

1. Navigate to Job Details page
2. Click on More menu
3. Click on Delete link
4. Click on Delete button
5. Job would be removed from AIMS
6. User would be directed to Job Dashboard page for his / her default branch with success message displayed.

Note: *The Delete functionality is a "soft delete" and will continue to exist in the database. To permanently remove it, contact the database administrator so that hard delete can be performed via SQL.*

4.14.5 Job Edit

It allows user to modify the records exist in a field without splitting job.

- Select Job → Modify → Job Edit

Users with Admin rights are able to perform following actions:

1. Select file and fields.
2. Select ranges (From and to).
3. Searching for fields exists in the existing file.

4.14.6 Copies

This feature allows the user to perform two functions:

1. Modify the information of available component(s) in a Mail.dat Job
2. Create the Component Characteristic File (CCR) if needed.

mation about available component(s), perform the following steps:

1. Navigate to Job Details page
2. Click on Modify menu
3. Click on Copies menu
4. Click on Edit button by scrolling to the end of a row.

4.14.7 Edit Copies

Edit information in desired fields

1. Click on Save button
2. Click on OK button in confirmation popup to synchronize weight change. This will impact MPU and CSM files weight fields

3. User would then be directed to Modify Copies page where changes can be seen
4. Clicking on Cancel button will direct the user to Modify Copies page

4.14.8 Postage Adjustment Record

This feature allows users to create the Postage Adjustment Record (PAR) file

To mark Spoilage, perform the following steps:

1. Navigate to Job Details Page
2. Click on Modify menu
3. Click on Spoilage menu
4. Select / enter valid data in all fields
5. Click on Save button
6. New PAR record will be created and PAR file will be displayed on Job details page
7. Clicking on Cancel button will direct the user to Job Details page

Note: When creating new PAR file records via Spoilage the following are impacts:

1. For Original Export, the HDR file will contain PAR file record status and count of records
2. For Update Export, the HDR file will contain PAR file record status and count of records as well as PAR file with record status as I

4.14.9 [Account Info](#)

This feature allows users to modify associations between Mail Piece Units and Mail Postage Accounts. This functionality impacts the MPU / C - Relationship Record (MCR) file.

This is only possible if there are multiple Permits (for non-Periodical Jobs) and /or Publication Numbers (for Periodical Jobs) available for that particular branch (see Section 1.2.3 and Section 1.2.4 for details).

To modify the association of an MPU with an MPA, perform the following steps:

1. Navigate to Job Details page
2. Click on Modify menu
3. Click on Account Info menu

4.14.10

Edit Piece & Postage Associate

In order to modify the Piece and Postage Associate, follow these steps.

1. Click on Edit button besides a record
2. Click on Modify Association link in popup
3. Select value from dropdown
1. Click on Update button
2. Record would be modified
3. Clicking on Cancel button would not make any changes
4. User can view the change in MCR file from File details page
5. For Original Export, the MCR file will contain the new account association with MPA
6. For Update Export, the HDR file will contain record status C for update in MCR file

7. For Update Export, the MCR file will contain the new account association with MPA and have U in record status field

5 Mail.dat Template

In Mail.dat file management, modification is considered as a time-consuming activity especially where the users have large data to be handled at individual file or fields level. This feature will let users define field values against a file of your choice and apply those values on a single or multiple job.

Further, these values will be saved in a form of a template for future use so you may re-use the same set of values if needed.

Following functions are incorporated in the Mail.dat templates:

1. Creation of single or multiple templates
2. Support of last 4 released and supported Mail.dat by PostalOne!
3. User specific templates
4. Templates associated to a specific branch
5. Apply an edit template explicitly on single or multiple Jobs
6. Apply an edit template automatically on Job import

5.1 Add New Template

To create a new template, perform the following steps:

1. Click on Mail.dat Template link on menu bar
2. A new page will open with the heading of Mail.dat Template. Any previously created templates would be displayed

3. To add a template first select a branch from the branch dropdown and click on Add button.
4. User would be directed to Add Template page
5. Enter Template Name
6. Enter Template Description
7. Select desired Mail.dat versions. User can select one or multiple versions
 - a. If user selects multiple Mail.dat versions then only common fields and e-numerations would be available
8. Select a file from Mail.dat File dropdown
9. Select a field from Mail.dat Fields for that file
10. User can input any of the following values:
 - a. Blank value
 - b. Pre-defined value from Mail.dat
 - c. Custom value input by user
 - d. Date from Calendar if it's a date field
11. Click on Add field after selecting a file, field and value
12. Once done, click on Save button
13. User would be directed to Edit Template page where newly added template would be displayed
14. To explicitly apply a template.

5.2 Edit Job Template

Users can edit existing Mail.dat Templates in which following functionalities are available:

1. Remove existing field in a file
2. Add a new field in existing file
3. Add a new file field which was not previously present

To modify an existing template, perform the following steps:

1. Navigate to Mail.dat Template page.
2. Select desired Branch to whom the user has access to
3. Click on Edit button besides an existing record
4. To add a new file or field repeat Step# 11 and 12.
5. To remove an existing field, click on Delete button besides a record
6. Click on Save button once done
7. User would be directed to Mail.dat Template page

5.3 Delete Job Template

Users can delete existing Mail.dat Templates provided that:

The template is not marked as Default Import Template and import time template application setting is not turned on as detailed in

There is at least 1 more template record present for that Branch

If import time is not configured then the template record can be deleted

To Delete an existing template, perform the following steps:

1. Navigate to Navigate to Mail.dat Template page
2. Click on Delete button besides a record
3. Click on OK button in confirmation popup

1. Record would be deleted

2. User would remain on Mail.dat Template page

5.4 Apply Job Template to Existing Job

Templates can be applied in 2 ways:

1. Explicitly selecting Jobs from Jobs Dashboard page
2. Automatically applied on successful Job Import

5.4.1 Manually Apply Template

To manually apply a template, perform the following steps:

1. Navigate to Jobs Dashboard page
2. Select desired Jobs (filter if needed)
3. Click on Actions dropdown
4. Select Job Edit Template option
5. Select desired Template from popup. To view Details, click on View Template link. Templates made by other users can also be viewed and applied by clicking on Another user's radio button
6. Click on Apply button

Template would be applied with following updates:

- a. File(s) status would be updated to C
- b. Record status would be updated to U
- c. Changes can be seen on viewing the desired files and fields

5.4.2 Automatically Apply Template

To apply a template automatically at import time, perform the following steps:

1. Navigate to Mail.dat Template page
2. Click on Active checkbox
3. Click on Default Import Template checkbox
4. Make sure import setting for template.
5. All Jobs imported for that Branch would have template applied

6. To stop automatic template application at import time, check off Default Import Template checkbox.

6 PO! Dashboard

All the jobs Exported to Postal One! using Export to PostalOne! feature is displayed on 'PO! Dashboard' User can access 'PO! Dashboard' from Mail product menu bar.

This feature allows user to view status of the PO! exported jobs. There are three statuses of the job

1. In progress
2. Success
3. Failed

In progress and failed transactions are displayed in "InProgress / Failed jobs" tab, while successful transaction (client and Server both statuses should be success) are displayed in 'uploaded jobs' tab.

6.1 Client Status

Client status shows the Client validation status of PO! Submitted jobs. This status will update if PostalOne! Client validation setting is turned on.

6.2 Server Status

This status shows the server validation status of PO! Submitted jobs, this status is updated only after completion of server validation at PO! to update server status click on *Refresh* button.

Clicking on refresh will pull the Receipt and status will be updated according to the receipt file, if receipt file is not present then status will not update until receipt is available in such case wait for few more minutes and refresh again.

6.3 Uploaded Jobs

All the successfully uploaded Transaction of Mail.dat (that are exported from AIMS) are present on Uploaded jobs page. In case of multiple transactions most recent transaction is displayed on top in successful jobs grid.

User can view multiple transactions by clicking on link present in "*No. of Transactions*" column which will open all the transactions of selected job in same window.

6.4 [View Errors](#)

PO! Dashboard allows user to view and fix Errors of PO! failed jobs.

To view Errors of PO! failed jobs follow the defined steps:

1. Navigate to PO! dashboard page.
2. Click on view link against failed job. it will open errors page.

6.5 [Quick Fix](#)

User can fix Errors of PO! client validation failed jobs by using Quick fix link.

To fix any error follow the below defined steps:

1. Navigate to PO! dashboard page.
2. Click on view link against failed job, it will open errors page.
3. Click on Quick fix link against errors page.

7 Archive Job

Users can utilize this feature to archive their current jobs by following the outlined steps below:

- Go to the mail.dat dashboard.
- Choose the job you wish to archive.
- Open the Action dropdown menu.
- Select "Archive" from the options.
- The jobs you selected will now be archived.

7.1 [Re-import Job](#)

User can reimport their archived job by following the outlined steps below:

- Open the "Archived Jobs" section.
- Select the option to re-import next to the specific job you are interested in.
- New AIMS ID would be generated.

Note: It will re-import as a fresh Job

7.2 Export Job

User can export their archived job by following the outlined steps below:

- Open the "Archived Jobs" section.
- Select the option to export next to the specific job you are interested in.
- New AIMS ID would be generated.

7.3 Restore

User can export their archived job by following the outlined steps below:

- Open the "Archived Jobs" section.
- Select the option to restore next to the specific job you are interested in.

Note: All elements related to the job will be restored

8 CSA Label

To navigate to CSA Labels, we have the clickable link on the Mail.dat dashboard

To access the CSA label feature, users need to follow the steps below:

- Navigate to "Settings."
- Under "Pallet Assurety," go to "Palletization."
- Select the branches for the available options and move them to the "Included" section.
- In the default section of the FCM Palletization settings, check the CSA option.
- Click the "Save" button to apply the changes.

8.1 Import CSA

To generate CSA, users must upload a CSV file by following the steps outlined below:

- Navigate to the CSA label.
- Choose the desired branch from the dropdown menu.

- Click on the "Import" button.
- Select the "Choose File" option.
- Complete the process by clicking the "Upload" button.

8.2 Generate CSA Labels

Print CSA label:

After the user uploads the file, they can generate a label for the uploaded file by following these steps:

- Once the file is uploaded, select the CSA ID from the dropdown menu.
- This selection will enable the user to print the label for the specific CSV file they uploaded.

While printing the label, the user can include optional fields based on their preferences. These optional fields include:

- Job ID
- Pallet Group ID
- Entry Point Line 1
- Entry Point Line 2
- Job Name
- Mailer ID
- User Info Line 1
- User Info Line 2
- DTAC Version
- Serial Number
- E-induction Indicator
- Mis-Shipped Indicator

The user can print multiple CSAs by selecting the desired container destination zip codes through checkmarks. Simply mark the checkboxes corresponding to the container destination zip codes for

which they want to print CSAs. Additionally, they user will also have the options to define the no of pallets and the no of copies if they want to print. After completing all the necessary steps, the user can finalize the process by clicking on "Generate Labels" located at the top left corner of the grid.

Add Sibling - Physical Pallet

To add siblings to the physical pallets, follow the steps outlined below:

- Navigate to the Import CSA page.
- Select "Add Sibling – Physical Pallet."
- Choose "Branch" on the top right.
- Use the dropdown to select the CSA ID.
- Provide the Job ID.
- Check the records you want to add as siblings.
- Click on Add Siblings.

This will Create Physical pallet As a Siblings of Logical Pallet only the records which “Dest zip” range in exists between “Container Dest. zip code” of Generate Label Records.

slf checked “Remove Existing Physical Pallet in mail.dat” will remove the existing Physical Pallet, and if checked “Delete Physical Pallet after linking” will remove selected record.

9 Pallet Assurety

This section covers the configuration for features that support Palletization of Mail.dat Jobs in AIMS and can only be configured by users with Administrator level rights.

- Settings → Mail Assurety → Pallet Assurety

9.1 Palletization

This section allows a user to decide which branches will be allowed to use features available under Pallet module and whether already Palletized jobs should be re-Palletized.

To enable Palletization for a Branch, perform the following steps:

- Settings → Mail Assurety → Pallet Assurety → Palletization

Admin need to follow these steps to perform Palletization.

1. Select any branch from Available Branches section.
2. Click on forward arrow to move branch(es) into Included Branches section
3. Click *Save* button will save the modification made
4. Clicking *Cancel* button will not make any changes

Note: *By default, no branch is available for Palletization.*

➤ Remove Palletization

To remove a Branch from Palletization, perform the following steps:

- Settings → Mail Assurety → Pallet Assurety → Palletization → Remove Palletization
1. Select a branch(es) from Included Branches section
 2. Click on backward arrow to move branch(es) into Available Branches section
 3. Click on *Save* button
 4. Clicking on *Cancel* button will not make any changes.

9.1.1 [Label List Data](#)

This section describes how the latest Label List available by USPS can be downloaded into AIMS so that Pallet's creation and Label printing can be performed. Since Label Lists are updated by USPS it is recommended to download Label Lists when a new Label List is released. The application of Label List data is for all branches in AIMS.

To download Label List, perform the following steps:

1. Navigate to AIMS Settings → Pallet Assurety → Label List Data
2. Select the desired year. It is recommended to download with current year
3. Click on *Start* button
4. Click on *OK* button in popup
5. Clicking *Cancel* button will not download Label List. If there is a previously downloaded Label List then it will not be updated.

10 Postage Assurety

AIMS settings contain Postage Assurety which allows user to add Postage which will get synced with a job uploaded using same account.

10.1 Promotions and Incentives

AIMS allows user to perform Postage addition. Follow these steps to setup Postage Assurety.

- Settings → Postage Assurety

User can perform following actions on Promotions and Incentives page.

- Add new Promotions and Incentives
- Active / Inactive existing

10.1.1 Add New Promotion & Incentives

In order to add new Promotion and Incentives, user needs to click “Add” button showed on a grid.

- Settings → Postage Assurety → Add New Promotions & Incentives

User needs to fill record in following fields which are mandatory.

1. Name
2. Type
 - a. Content
 - b. Incentive
 - c. Fee
3. Mail Class
 - a. First Class
 - b. Std Mail
 - c. Pkg Service
 - d. Std / Periodicals Co-Mailing
 - e. Other
4. Discount Available

- a. dollars (\$)
 - b. Percentage (%)
5. Start Date
6. End Date
7. Characteristics
8. Mail Shape
9. Rate Type
 - a. Regular
 - b. Non-Profit

These fields are optional.

1. Permit Number
2. CRID
3. Promotion Description

When all the fields are filled, user needs to click one of following buttons.

- Click “Save” button to save all the information entered.
- Click “Cancel” button to discard the action.

Once a valid data is entered in the fields, a success message will be displayed.

A new record gets added in a list with a particular Code number.

10.1.2 [User Configuration](#)

