



## Relay<sup>®</sup> Integrity Express Version 2.4.4

Quick Start Guide

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# 1 - Creating a Relay Integrity Express Template

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## Introduction

Relay Integrity Express provides Relay Inserters 2500 – 8000 with mail piece split and 2D Barcode placement. No Professional services are required and it is easy to set up a template in four quick steps.

To begin, you need to sign in to Relay Communications Hub at the following URL:

https://client.relayhub.us.pitneybowes.com/

The user name and instructions for setting your password are provided in your Welcome Email.

Once you have signed in the Relay Communications Hub web page is displayed.

## **Getting Started**

To create a Template follow the instructions below:

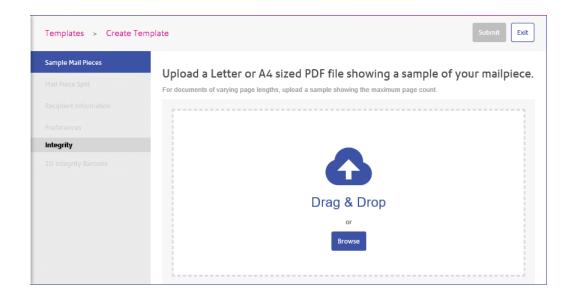
1. Click 🗉 in the right-hand panel.

The following page is opened:

	Templates			
<u>⊪</u>	Create New Template			
£1	Template Name	Last Updated	Created By	-
	Custom Enhance			o
	Zero removal			o
	HouseHolding			o
	Accumulation Template			٥
	Enhance2			0
	SalesDemo			0
	BArcodeAtBack			۰ .

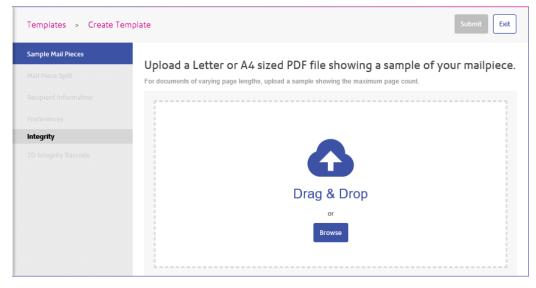
2. Click Create New Template.

This opens the Sample Mail Pieces page.



## Uploading a Sample Mail Piece

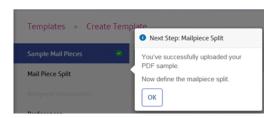
Continue in Sample Mail Pieces page, shown below:



- 1. Either:
  - · Drag and drop the file into the panel, or
  - Click Browse to navigate to and select the one you need.

Your file is opened in the **Templates** page.

2. A message is displayed advising that the operation was successful and which options to define next.



Click OK.

**Note:** A green check mark appears next to **Sample Mail Pieces** in the Template slide out menu.

## Specifying Mail Piece Split

Your file contains a number of mail pieces, each one destined for a different recipient. Specifying where the mail pieces end, or are split, ensures that the recipient received only the mail piece intended for them and not the entire file or part of another recipient's mail piece.

You can split a mail piece in one of two ways, both are described below:

- Where The Page Count is The Same Every Time on page 6
- Where The Page Count May Sometimes Vary on page 7

#### Where The Page Count is The Same Every Time

If your the page count in your mail pieces will be the same every time, create a page split as described below:

- 1. In the Template slide out menu select Mail Piece Split.
- 2. In My Page Count select Will be the same every time.
- 3. Specify How many pages.

This must be a whole number.

- 4. Click Apply Split Criteria.
- 5. A message is displayed advising that the scissors graphic, shown below, is used to indicate the mail piece split. Click **OK**.

**X**----<sup>1.3</sup>-----

The number shown above the dotted line given the mail piece and side number. In the example, 1.3, the mail piece in number 1 and the side number is 3.

Note: A green check mark appears next to Mail Pieces Split in the Template slide out menu.

#### Where The Page Count May Sometimes Vary

If your the page count in your mail pieces may sometimes vary, create a page split as described below:

- 1. In the Template slide out menu select Mail Piece Split.
- 2. In My Page Count select May Sometimes Vary.

Further options are then displayed in the panel:

Mail Piece Split My page count:	100000022 01 of 01		
Will be the same every time			
May sometimes vary ?	CLISTONER 8 0600 88 88 8 1001 4011	8 88 (Mot	n-Fri 7am-Sp
You can use our recommended page split text, or define your own. Use recommended text area	512345678 Mr William J Henderson 427 West Linton Crescent Watford Hertfordshire WD17 1AD	1000002	
<ul> <li>Define my own text area</li> </ul>	SUMMARY		
Recommended text area	Previous Balance as of 8/7/2001		2,000.00
Recommended lext area	Purchases and Cash Advances	+	1,466.22
	Payments and Other Credits	-	600.00
SUMMARY	FINANCE CHARGE	+	38.67
	Payment Due Date		21/8/2001
	Minimum Amount Due		58.09
The text area appears on	Approved Credit Limit: £8,000		
	Credit Used: £2904.59		
The first page 🔹	Credit Available: 2006.11		
	To increase your predit limit, call about do do do do		
Apply Split Criteria			

- 3. Select either:
  - Select **Use recommended text area** and continue to step #6. In the panel, the recommended text is show in **Recommended text area**, in the example this is, "Summary". In the mail piece "Summary" is outlined in green.
  - Select Define my own text area and continue to step #4.
- 4. Click and drag a box around the required text.

Note: The selected text must only appear once in the mail piece.

A further box is opened in the Mail Piece Split panel giving Your defined text area.

- 5. Select whether The copy in this text area will:
  - Never Change so that the same text is used to find the correct page.
  - Always Change to find the text box rather than the text.. If you select this option continue to step #6.
- 6. Select The text area appears on from the list.
- 7. Click Apply Split Criteria.
- 8. A message is displayed advising that the scissors graphic, shown below, is used to indicate the mail piece split. Click **OK**.

**X** ... 1.3

The number shown above the dotted line given the mail piece and side number. In the example, 1.3, the mail piece in number 1 and the side number is 3.

Note: A green check mark appears next to Mail Pieces Split in the Template slide out menu.

## Identifying Recipient Information

To identifying recipient information, follow the procedure below:

**Note:** In this section only the **Recipient Name**, **Recipient Address** and **Unique Identifier** are required. The **Recipient Email** is only required where mail pieces are to be emailed rather than posted.

1. In the left-hand panel click **Recipient Information**.

This opens the **Recipient Information** page, shown below:

Sample Mail Pieces 🛛 🥝	Recipient Information	- 52 % +		Page 1 of 38
Mail Piece Split 🛛 🥝		mmerer Page 2 d'3	^	and the same state of the same
Recipient Information	Identify recipients by drawing a box around each of the following fields.	STRUCTURE IN CONTRACT STRUCTURE IN CONTRACT IN CONTRAC		A 12 A 20 A 2 A 10 A 20 A 2 C 10 A 20 A 20 A 20 A 2 C 10 A 20 A
Preferences	Recipient Name * 🕕	U LLUTIO/O to/theruine 427 theruine Centeri Value Mathematical Math		Number 19 Day Street Bank States
Integrity	Select a Zone 💌	BUNNARY         Interview		
	Recipient Address *	Number of DBMS         IE IF Subscription Statements         DBMS         DBMS <thdbms< th="">         DBMS         DBMS</thdbms<>		
	Select a Zone 💌	Certian 60x8 protein grant of hot by a security and a security ane		1.1
	Unique Identifier *	bank giro credit 🚳		L. I aret.
	Select a Zone 💌	Normality Statement and Statem		North Control of Contr
	Recipient Email			
	Select a Zone			And a second sec

The panel on the left gives the **Recipient Information**, the middle panel shows the uploaded file and the right-hand panel gives a preview of the settings as you apply them.

2. Click and drag a box around the recipient name in the mail piece.

This area appears as a green box, as shown below. The number is the zone, which you'll need in the next step. If required, click to delete the box.

We strongly recommend making the box longer to accommodate longer recipient names in the remainder of the file.



3. From **Recipient Name** select Zone 1, created in the previous step.

The required zone is displayed in the list with the name of the recipient from the mail piece on which the box was created.

- 4. Click and drag a box around the recipient address.
- 5. From **Recipient Address** select Zone 2, created in the previous step.

We strongly recommend making the box larger to accommodate longer addresses in the remainder of the file.

The required zone is displayed in the list with the address from the mail piece on which the box was created.

- 6. Click and drag a box around the a unique identifier, for example, the recipient's account number.
- 7. From Unique Identifier select Zone 3, created in the previous step.

- 8. If available, click and drag a box around the a recipient email.
- 9. From Recipient Email select Zone 4, created in the previous step.

**Note:** A green check mark appears next to **Recipient Information** in the Template slide out menu.

## Specifying Preferences

To specify a template name, follow the procedure below:

1. In the Template slide out menu click **Preferences**.

This opens the **Preferences** page, shown below:

Templates > Create Te	mplate	Submit
Sample Mail Pieces	Preferences	
Mail Piece Split 🛛 📀	Template Name *	
Recipient Information	Give the template a memorable name	
Preferences	Click on Validate Preferences to check the	
Integrity	entered name	
	Validate Preferences	

Use \_\_\_\_\_\_\_ to adjust the scale in which the mail piece is displayed.

- 2. In **Template Name** type in a name.
- 3. Click Validate Preferences.

Note: A green check mark appears next to **Preferences** in the Template slide out menu.

## Creating a 2D Integrity Barcode

Currently, the only Integrity option is to place a 2D barcode on a page.

To create a 2D Integrity Barcode, follow the procedure below:

1. In the left-hand panel click 2D Integrity Barcode.

This opens the **2D Integrity Barcode** page.

2. Click Enable Barcode.

A message is displayed advising that the selected inserter options will add blank pages to your mailpieces. These options are described in **Configuring Inserters**.

3. Click **OK** to close the message.

The following is opened:

Templates > Create	Template			Submit Sav	e as Draft Exit
Sample Mail Pieces Mail Piece Split	<ul> <li>2D Integrity Barcode</li> </ul>	▲ _ <u>260 %</u>	+ x: 13 mm y: 27 mm	Use Recommended Posi Page	
Recipient Information	Disable Barcode	•		^	
Preferences	Inserter Model*	_ 1	Suggested B:	and from the	100 C
Integrity	Relay 5000	•	• Juggested b		ii ann an ann an an an an an an an an an a
2D Integrity Barcode	Inserter Module High Capacity Sheet Feeder	20	We recommend yo You can move it by just make sure it si isn't blocking anyth Once you're happy	dragging and ays in the gree ing else on the	
	Simplex or Duplex*		the button "Check		1.1
	Simplex	40	ок	*	
	Envelope*				
	440 / 48 - 00				
	Check Barcode Placement				

Click **OK** to close the message.

- 4. In Inserter Model, select the model of the inserter you will be using.
- 5. In Inserter Module, select the required module.
- 6. In **Simplex or Duplex**, select whether the documents using this template will print single- or double-sided.

If you select **Simplex**, a blank back side is displayed in the **Pages** panel for every front side of the template.

The following is shown at the end of every mail piece:

≫-----

Each page has a two digit designation, for example, 1.1 indicates that the page is the first mail piece's first side, 1.2 is the first mail pieces second side and 3.3 indicates that the third mail piece's third side.

- 7. In Envelope, select the size required.
- 8. In Fold, select how the mail pieces are to be folded.
- 9. In Insert, select either:
  - No Insert
  - The required insert from those available
- 10. In Address Location, the area of the mail piece in which the address appears.
- 11. Do one of the following:
  - Click Use Recommended Position.
  - Click and drag the barcode into the required position and click **Check barcode Placement** to ensure that the location is satisfactory. If it is not, repeat until you find one that is satisfactory.
  - Type in the x and y coordinates the barcode is placed. These coordinate specify the center of the barcode. Click **Check barcode Placement** to ensure that the location is satisfactory.

If it is not, repeat until you find one that is satisfactory.

If barcode placement is unsatisfactory, as indicated by its red border, scroll through the job or click a red page number open the effected page. Click and drag the barcode to a location clear of other content, where its border changes to amber. One way of doing this quickly is to click Use Recommended Position and resubmit the Template.

A message is displayed to confirm that the draft is submitted successfully.

12. Click Submit.

**Note:** A green check mark appears next to **2D Integrity Barcode** in the Template slide out menu.

## Configuring Inserters

To configure a Template's inserter, follow the procedure, next:

1. From within the **Templates** page, shown below, find the new template and click 🍄.

•	Templates			
<b>⊡</b>	Create New Template			
۵	Template Name	Last Updated	Created By	
<u>2</u> 1	Test 1	27/02/2018	riedemo@yopmail.com	۵
	RIE Demo Invoice	28/02/2018	riedemo@yopmail.com	<b>•</b>
				Inserter Settings
				Edit Delete

2. From the context menu select **Inserter Settings** (only for Relay 5000 – 8000).

The following is displayed:

For this barcode, change the camera position on your
nserter to:
96mm Right Of Center

- 3. Click **Download Instructions** to download a PDF file describing this process. We strongly recommend that you print these and have them available while undertaking this procedure.
- 4. Insert the flash drive into a USB slot on the PC.
- 5. Click Download Inserter Settings.
- 6. Click the down arrow on the **Save** button.
- 7. Navigate to the required location on the flash drive and click **Save as**.
- 8. Click Save.
- 9. Make a note of the **Inserter Camera Position**, you will need this to set the camera on your inserter so that it is able to read the barcodes on the pages of your job. You the need to remove the flash drive and use it to load the file onto your chosen inserter. Use the measurement given in **Inserter Camera Position** and change the inserter's camera position, if required.

## 2 - Submitting and Downloading Output Files

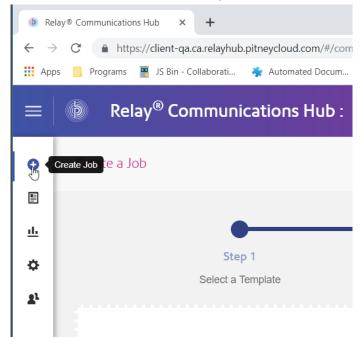
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## Submitting a Job

Use your newly created template to apply the 2D barcode to documents that are in the same format.

1. Click Create a Job, on the Relay Communications Hub home page.



2. Select the template you want to use and click **Next Step** in the upper right of the screen.

=	Relay <sup>®</sup> Communications Hub : QA	Comp	? 🝞 Gyan Admin
0	Create a Job		Next Step
<u>ıtı</u>	0	•	•
۵	Step 1 Select a Template	Step 2 Select Mailpieces to Upload	Step 3 Job Properties
<b>2</b> 1			0001100000
		Based 1	

- 3. Either:
  - Drag and drop the file into the panel, or
  - Click Browse to navigate to and select the document. The document should be in the PDF format.

0	Create a Job		Back Next Step
<u>ılı</u>	•	O	
¢	Step 1	Step 2	Step 3
gi.	Select a Template	Select Mailpieces to Upload	Job Properties
		•	
		Drag & Drop	
		or	

- 4. Click **Next Step** after the file is added.
- 5. Enter a name for the job in the **Job Name** box. Click **Submit** in the upper right of the screen.

Job Properties		
Job Name 🚺		
Monthly Invoices		

A pop up message displays indicating the documents are being uploaded. When complete, a green check mark appears and a confirmation message is displayed stating that the PDF has been successfully uploaded.

	Succ	ess!			
$\checkmark$					
All documents successfully uploaded.					
Template Custom Enhance is now being applied to this job					
	View Job Reports	Create New Job			

Click the View Job Reports button to see the reports.

## Downloading Output Files

1. Click 🏪 in the left-hand panel to go to the **Job Reports** screen, a green check mark indicates the job is complete.

	Prelay <sup>®</sup> Communications H	ub :					🧿 🚯 Gyan Admin
0	Job Reports			Q Search fo	r a job	16/02/19 - 22/02/19	🖀 🖸 Export 🖉
≞ <u>⊥</u>	22 Feb 2019 Demo Updated Sales Demo gyanadmin@yopmail.com	15:28:51 坐 🛅	Demo     Template: Updated Sales Demo     Complete Your output file	e is ready for download.			と Download Output Files
£l	21 Feb 2019	-	Job Summary	Print	Email		
			Input File			Status	Date Completed
			Demo.pdf			<ul> <li>File Uploaded</li> </ul>	22/02/2019 15:28
				Pages		Documents	Recipients
			Output	24		12	12

- 2. Click *C* in the upper right corner of the screen to ensure you have the most up to date information.
- 3. Select the file you want to download from the list.
- 4. Click the **Download Output Files** button in the upper right of the screen to download the document, which now have the 2D barcode applied and will be ready for insertion using your Relay Inserter.

5. Alternatively, you can also click  $\stackrel{\checkmark}{\simeq}$  in the left-hand panel to download your document.

# 3 - More Information

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