



ConfirmDelivery for Windows™ Quick Start Guide

Version 2.1.3.52

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ConfirmDelivery for Windows™

Introduction

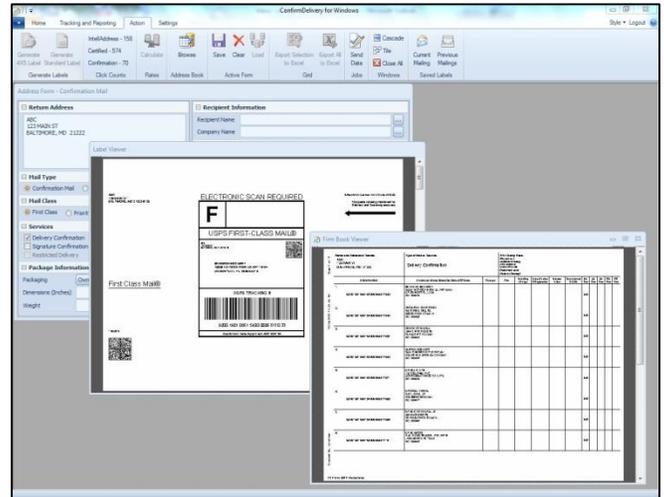
Using all the features of *ConfirmDelivery.com*, *ConfirmDelivery for Windows* is easy to implement and highly flexible.

- Installs on any PC and connects seamlessly to your address database.
- Rapidly process large volumes of mail in automated environments.
- Versatile batch processing and data extraction capabilities.

Once loaded on your system, *ConfirmDelivery for Windows* enables your database to connect to the United States Postal Service national tracking and address verification system. Select multiple addresses from your database to generate address sheets or labels of your choice.

This Quick Start Guide will walk you through the basic functionality of *ConfirmDelivery for Windows*.

To download *ConfirmDelivery for Windows*, please visit <https://secure.confirmdelivery.com/MAILNet/files/Windows/ConfirmDelivery.application>.



ConfirmDelivery for Windows™

Launching the Software

ConfirmDelivery for Windows is a standalone software application that can be launched from a desktop shortcut (Figure 1.1) or from the Windows Start Menu (Figure 1.2).



Figure 1.1

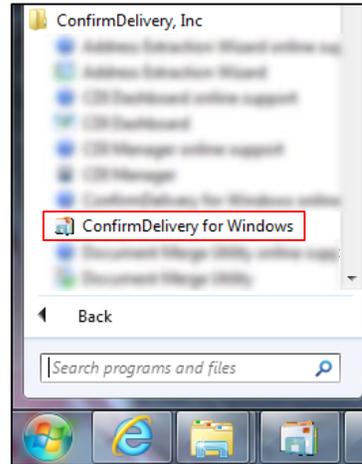


Figure 1.2

Once the software is launched, login using your *ConfirmDelivery.com* username and password (Figure 1.3).

Note: You must register an account on *ConfirmDelivery.com* before using *ConfirmDelivery for Windows*. Try the *ConfirmDelivery for Windows* demo by logging in with the username "mailer" and password "mailer".



Figure 1.3

Connecting to an Address Database

ConfirmDelivery for Windows can connect to virtually any type of address database, from a simple Excel file to a SQL Server database. The following step by step instructions will guide you through connecting to an Excel file (.xls or .csv).

Step 1: On the Settings tab, select “External Data Connection Wizard” (Figure 2.1). This will open the Data Connection Wizard (Figure 2.2).



Figure 2.1



Figure 2.2

Step 2: Select “Address Book” and click Next (Figure 2.3).



Figure 2.3

Step 3: Select the type of database to connect with and click Next. As an example, Microsoft Excel Spreadsheet has been selected (Figure 2.4).

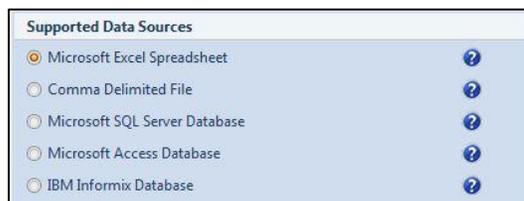


Figure 2.4

Step 4: Click the “...” button (Figure 2.5). This will open the file explorer dialog (Figure 2.6).

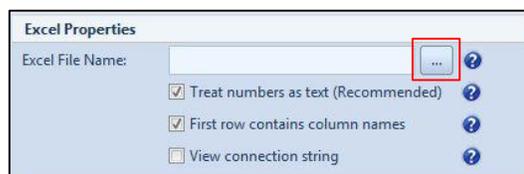


Figure 2.5

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Step 4 (Continued): Select your address database file and click “Open” (Figure 2.6). Click Next.

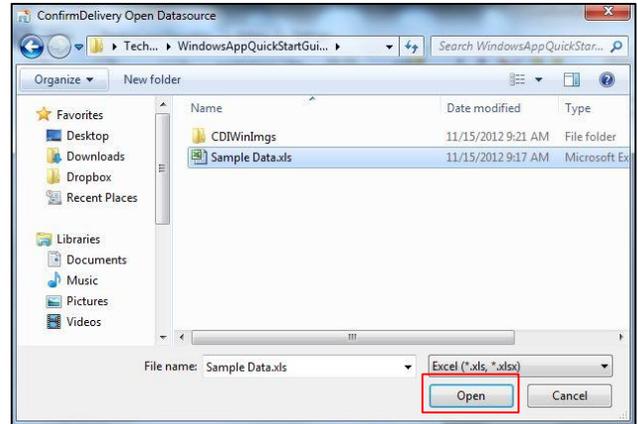


Figure 2.6

Step 5: Open the “Table Name” dropdown menu and select the appropriate table or sheet where your address data resides (Figure 2.7).

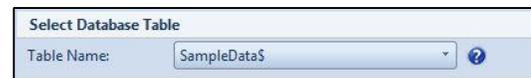


Figure 2.7

Note: For Excel files, tables are often named by default as “Sheet 1”, “Sheet 2”, etc.

Step 6: Begin mapping your address database (Figure 2.8). Match the predefined table fields (left) with the appropriate column names in your database (right). Click Next.

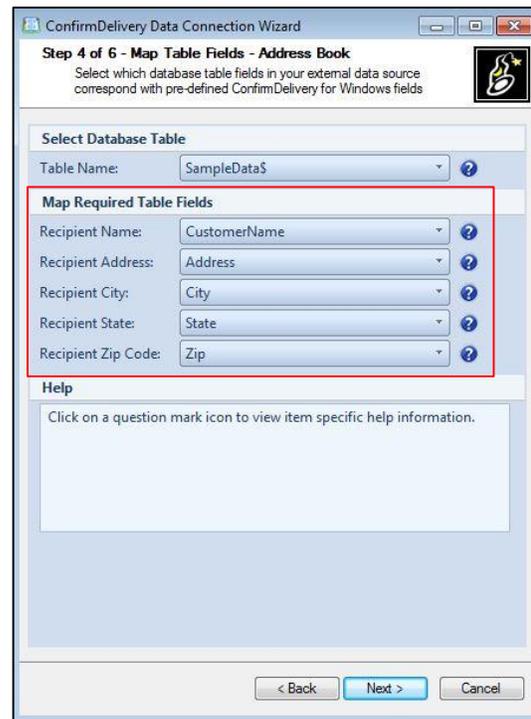


Figure 2.8

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Step 6 (Continued): Continue mapping your address database to the optional table fields (Figure 2.9). Match the optional predefined table fields (left) with the appropriate column names in your database (right). Click Next.

Note: If you do not have any optional fields to map, simply click Next.

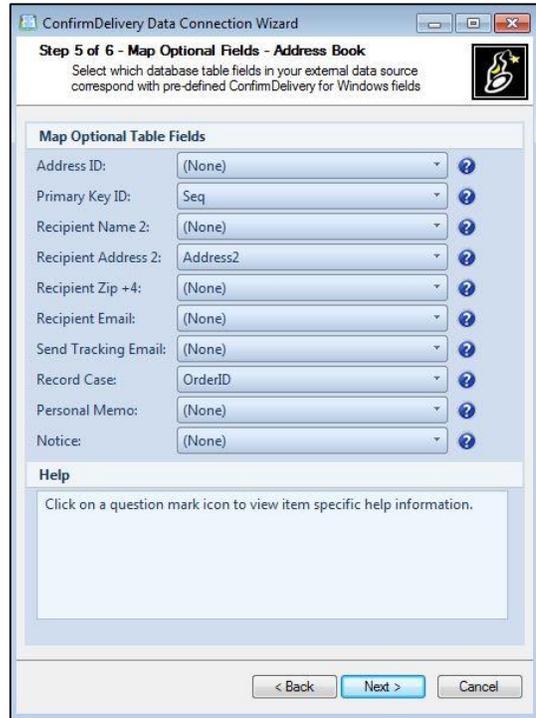


Figure 2.9

Step 7: Click “Finish” on the Data Connection Wizard (Figure 2.10). When prompted to save your settings, click Yes (Figure 2.11).

Your address database is now connected to *ConfirmDelivery for Windows*.

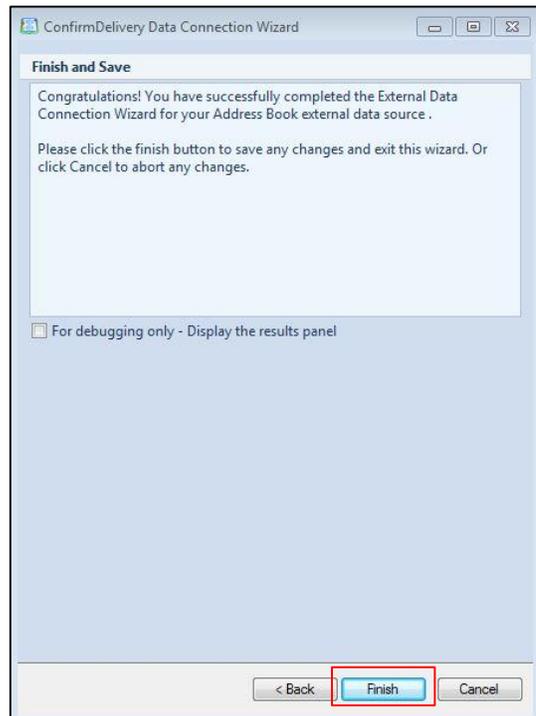


Figure 2.10

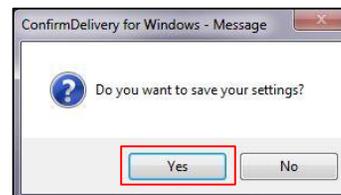


Figure 2.11

Start New Mailing

The following step by step instructions will guide you through the process of creating mailing labels and address sheets with *ConfirmDelivery for Windows*.

Step 1: To start a new mailing, click the “Start New Mailing” button on the Home tab (Figure 3.1). This will open the Address Form screen (Figure 3.2).



Figure 3.1

Figure 3.2

Step 2: Select a Mail Type (Figure 3.3). You can only select a mail type if you have purchased transactions for that type of mail.

Figure 3.3

Step 3: Select a Mail Class (Figure 3.4).

Figure 3.4

- First Class
 - Weight: 1 – 13 Ounces
 - Delivery Time: 1 – 3 Days
- Priority Mail
 - Weight: 1 Ounce – 70 Pounds
 - Delivery Time: 1 – 3 Days
- Package Services
 - Weight: Variable
 - Delivery Time: 1 – 9 Days

Figure 3.5

Step 4: Select applicable Services (Figure 3.5).

Note: Service availability depends on the combination of the selected Mail Type and Mail Class.

Figure 3.6

Step 5: Optionally include Package Information (Figure 3.6).

Note: Package Information is optional. However, when you indicate a Weight, the total postage dollar amount will automatically print on the Firmbook for each mail piece when generated.

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Step 6: The recipient address(es) can be selected from the mapped address book or keyed manually on the address form (Figure 3.7).

Click the “...” button at the end of the Recipient Name field (Figure 3.7) to open your address book (Figure 3.8).

- To select a single address from the address book, simply double-click on the address (Figure 3.8).
- To select every address in the address book, click the “Select All” button, then click the “Select” button (Figure 3.8).
- To select multiple addresses, hold down the “Ctrl” key on your keyboard while clicking each address, then release the “Ctrl” key and click “Select” (Figure 3.8).

Recipient Name [...]
Company Name [...]
Address
Apt / Suite
City
State [v] Zip [] - []
Additional Information
Record / Case [...]
Notes
Notices: None [v] Lock [x]
Recipient Email Information
Email Address [] Send Email [x]
Address Options
Standardize Address(es) [x] Update Address Book? []

Figure 3.7

Name	Delivery Address	Secondary Unit Info	City	State
Allan Granados	2966 S 200 E, Apt 51		South Salt Lake	Utah
Balazs Tarnai	422 Sawmill Road		Greensburg	Pennsylvania
Brandon McCurry	10000 Victoria Park Lane	Apt 10104	Davenport	Florida
Christina Chartouri	160 ROUND HILL RD		GREENWICH	Connecticut
Chuck Crandell	3909 N. Paradise Rd.		Flagstaff	Arizona
CLIFTON BENNETT	1030 W MORENO AVE	apt#204	colorado springs	Colorado
Daniel R. Cain	312 Williams Avenue		South Milwaukee	Wisconsin
Darrell Young	1501 Joann St		Columbia	Missouri
David E Crandall Jr	269 Klondike Rd		Charlestown	Rhode Island
David Green	1428 W HUNTINGTON AVE APT B		JONESBORO	Arkansas
David Zareski	264 Lower Stella Ireland Road	Apt #4A	Binghamton	New York
Derek Fenton	188 N Summit Dr # 117		Holts Summit	Missouri
Donald Smith	200 Washington St	Front Door	Brighton	Massachusetts
Douglas Ricketts	PO Box 923		Oakhurst	Oklahoma
dustin berna	420 ne 24th street		wilton manors	Florida
FERNANDO GONZALEZ/LUIS R.R.	6522 CAMP BULLIS RD APT 4108		SAN ANTONIO	Texas
gary l. miller	1624 clinton ave se		roanoke	Virginia
George Philip Foord	5051 Occoquan Overlook		Woodbridge	Virginia
H. Green, Rita	27716 Cook Rd.	Tlr. 57	Olmeted Township	Ohio

Select All Cancel Select

Figure 3.8

Step 7: Click the “Notices” dropdown to select a notice from the menu, or type a custom notice in the “Notices” field (Figure 3.9).

Step 8: The Address Options offer the ability to Standardize Addresses and Update Address Book (Figure 3.10).

- Standardize Address(es): when selected, this feature will correct and standardize improper addresses and ZIP + 4 assign each address.
- Update Address Book: when selected, this feature will replace the improper addresses in your address database with the standardized addresses.

Notices: None [v]
Recipient Email: None
Email Address
Address Options
Standardize Address(es) [x] Update Address Book? []

Figure 3.9

Address Options
Standardize Address(es) [x] Update Address Book? []

Figure 3.10

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Step 9: Click one of the “Generate Labels” buttons to begin processing your mailing. These options are dependent on the Mail Type selected:

- Confirmation Mail: creates 4x5 Mailing Labels or full page 8.5 x 11 Mailing Labels (Figure 3.11).
- Certified Mail: creates full page 8.5 x 11 Mailing Labels (Figure 3.12).
- IntellAddress Mail: creates Portrait 8.5 x 11 Mailing Labels or Landscape 8.5 x 11 Mailing Labels (Figure 3.13).

If “Standardize Address(es)” was selected (Step 8), your addresses will be standardized once a Generate Labels button is clicked (Figure 3.14). Any critical address errors will be reported (Figure 3.15).

- Click “Continue” to generate mailing labels using the reported addresses (Figure 3.15).
- Click “Cancel” to halt the entire process (Figure 3.15).

Your mailing labels will begin processing (Figure 3.16).



Figure 3.11



Figure 3.12



Figure 3.13

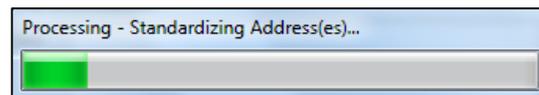


Figure 3.14

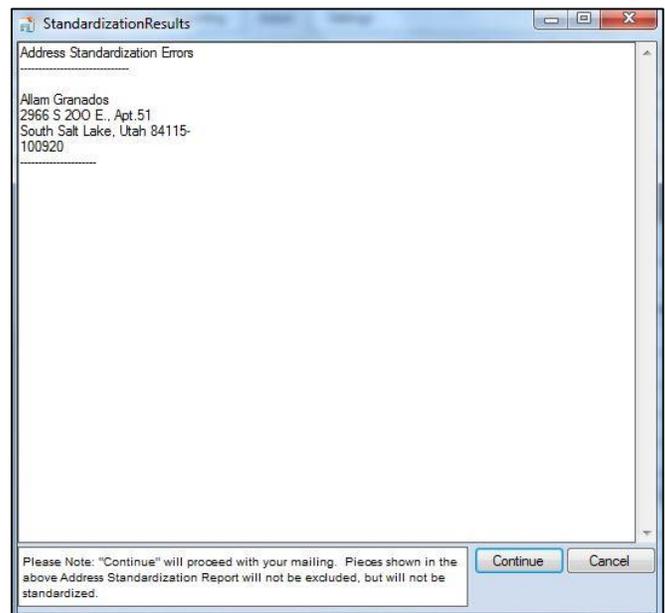


Figure 3.15

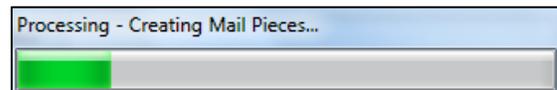


Figure 3.16

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Step 9 (Continued): Once your mailing labels have been generated, you will be prompted to generate a Firmbook (Figure 3.17). Click “Yes” to generate this documentation.

Note: The Firmbook is optional, and can be used as a legal Proof of Mailing document.

Your Mailing Labels and Firmbook are now ready to print (Figure 3.18).

Note: See “Saved Labels” on Page 12 to learn about printing your labels at a later time.



Figure 3.17

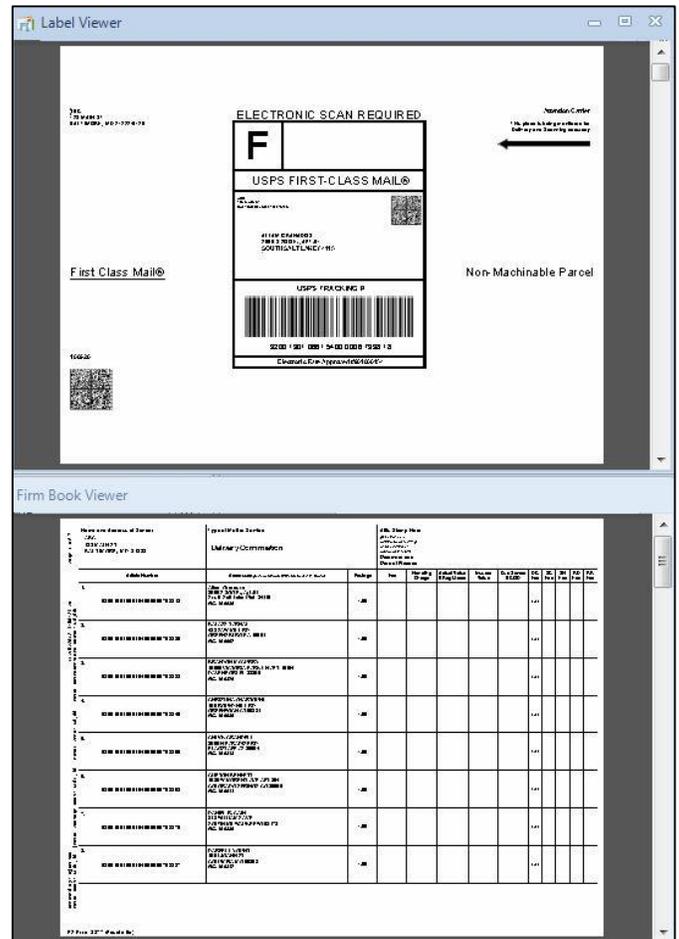


Figure 3.18

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Saved Label Queue

All mailing labels created with *ConfirmDelivery for Windows* are saved locally on your computer for future access. This allows a user to create multiple batches of labels, and then print them all at once at a later time.

This feature is located on the Action tab under “Saved Labels” (Figure 4.1).

Current Mailing: Chronologically displays all labels created during the current software session (Figure 4.2). These labels can be printed.

Note: Once the software is closed, the labels under *Current Mailing* are moved to *Previous Mailings*.

Previous Mailings: Displays a list of all previous mailings by the date and time created. Click on any of the previous mailings, and then click the “Open File” button to display the mailing labels for printing (Figure 4.3).

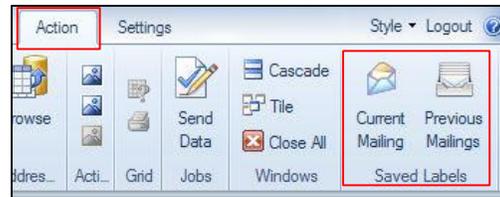


Figure 4.1

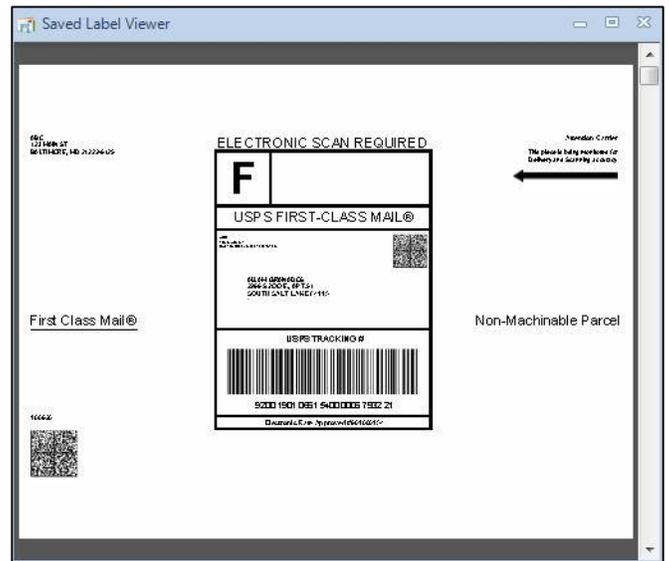


Figure 4.2

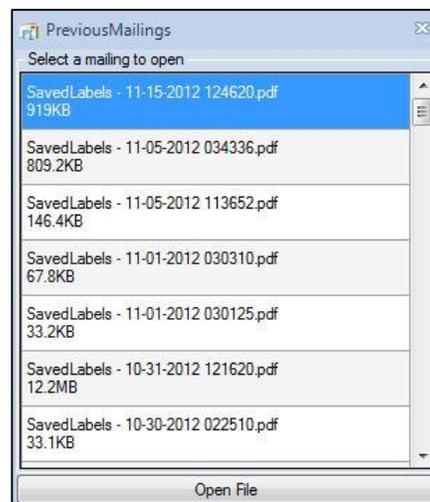


Figure 4.3

Basic Settings

The following is an overview of the basic settings for *ConfirmDelivery for Windows*. These options are located on the Settings tab.

Print Record/Case: When enabled, information entered in the Record/Case Number field on the Address Form will print on the mailing label (Figure 5.1).



Figure 5.1

RC Location: If “Print Record/Case” is enabled, this option allows you to choose where the Record/Case Number will print on the mailing label (Figure 5.2).

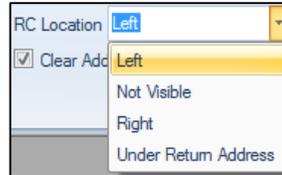


Figure 5.2

Always Standardize: When enabled, your addresses will be standardized by default (Figure 5.3). See Step 8 under Start New Mailing for more information on Address Standardization.

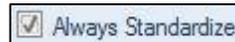


Figure 5.3

Clear Address After Label Creation: When enabled, all recipient address data in the Address Form will clear after the mailing label is created (Figure 5.4).

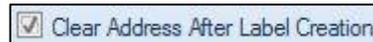


Figure 5.4

Troubleshooting

Microsoft OLEDB Driver

ConfirmDelivery for Windows requires a Microsoft OLEDB driver to be installed on your computer. If you are receiving an error upon launching *ConfirmDelivery for Windows*, it's likely that this driver has not been installed.

Step 1: To download this driver, visit

<http://www.microsoft.com/en-us/download/details.aspx?id=23734>.

Step 2: Click the “Download” button (Figure 6.1). If your download doesn't start automatically, click “Start Download” on the following page (Figure 6.2).

Step 3: Click “Run” and follow the on-screen instructions to complete the installation (Figure 6.3).

Note: You may need to consult with your in-house Computer Network Administrator to download and install this software.

Other troubleshooting issues

Please contact ConfirmDelivery Customer Support at **(888) 960-MAIL** or email support@confirmdelivery.com.

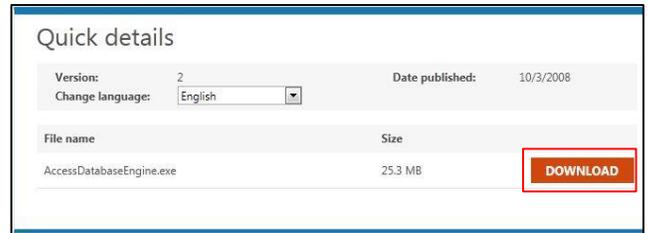


Figure 6.1

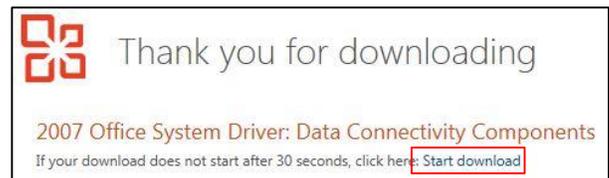


Figure 6.2



Figure 6.3