High Density Mail Setup Instructions

Because connections matter.

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Introduction to High Density Mail (HDM)

What is High Density Mail?

This feature will allow the WTS users to Receive and Deliver mail from either the Website or Android mobile device to a Recipients Mail Folder. Email and SMS notifications can also be configured to alert the Recipient that mail has arrived and needs to be picked up/delivered.



Enabling High Density Mail for a Customer

High Density Mail (HDM) can only be enabled by a **Support User** for any **Standard** or **Premium Package Tracking accounts**. Quadient can enable or disable this at any time at no charge.

1. Login to the customer's account as a **Support User** and navigate to *Admin* → *Expert* → *Advanced System Settings*.



2. Check Enable High Density Mail and then click Submit to save the setting.





3. When enabled, a new icon will show under the App menu at the top and will be available for any user that has the Receive and Deliver user permission or higher.



4. Clicking this button will take the user to the **HDM section** of WTS and will be navigated to the **Receive Mail screen.** All HDM-related functions will be available via the **Toolbar**.

| by Quadient | | 🕅 High Density Mail | | | | | | | | |
|----------------------|--|-------------------------------------|--|----------------|--|--|--|--|--|--|
| | | CD Dashboard | Receive Mail Retrieve | Manage Folders | යියි Recipients | | | | | |
| Research / Report | Receive Mail Select Recipient | ٩ | | | | | | | | |
| Retrieved Mail Today | The last 20 records will display below, if a folder or recip | ient was scanned on accider | t it can be removed by selecting the delete ic | m. | | | | | | |
| | 2 Mail Records Recipient Harris, Dustin | Received Date + 11/17/2022 09:26:00 | Sam | | Mail Storage Location Harris, Dustin Folder | | | | | |
| | Harris, Dustin | 11/17/2022 09:21:3 | 7am | | Harris, Dustin Folder | | | | | |



Manage Folders

The Manage Folders screen is used to print Recipient Folder Labels that are used to easily identify, store, and receive/retrieve mail that is stored in the Recipient Mail Folder. These folders are then typically placed into Mail Organizers. Recipient Folder Labels will have a barcode that can be scanned to quickly mark the Recipient Mail Folder as 'Mail Received'. This page will allow the user to mass print Recipient Folder Labels using a range of filters and can see when they were last printed.

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|---|-------|---------------------|-------------------------|--|--------------------------|------------------------|--------------|-----------------------------|
| | | | C Dashboard | Receive Mail | Manage Folders 유영 Reci | pients | | |
| < Research / Report | Manag | je Folders | | | | | | |
| Find Mail Pending Mail Acceived Mail Today Retrieved Mail Today | | Respirent harris | Badge ID Cost Center | Malibox Number Cempany Lest Protect Never | Recipient Location EMail | Room Classification | Department | |
| | 쪻 | Recipient | Recipient Location | | failbox Number | Classification | Last Printed | Group |
| | | Harris, Ivory | Neopost Field Sales | | | | Never | |
| | | Harris, David | Shipping | | | | Never | |
| | | Harris, Michael | Neopost Field Services | | | | Never | |
| | | | | | | | | Check all Group Label Print |

What you need:

- WTS User with at least *Receive and Deliver* privileges
- SubPrint installed and configured
- Workstation with a Label Printer
- **Containers** (like Manila Folders, Mail Boxes, etc.) that the **Recipient Mail Folder Label** will be placed onto and where their **Mail** will be placed into
- Badge ID is a requirement to print folder labels!



Printing Recipient Mail Folders

1. Login to WTS, click on HDM under the *App Menu*, and then Manage Folders.



2. Using the filters available, search for the Recipients that need **Recipient Folder Labels** to be printed and then click on *Find*.

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|--|-------|-------------------|-------------------------|--|--|------------------------|--------------|-----------------------------|
| | | | Co Dashboard | Receive Mail | Manage Folders 888 Recipi | ents | | |
| < Research / Report | Manag | e Folders | | | | | | |
| Find Mail Pending Mail Received Mail Today Pending Mail Today Pending Mail Today | | Beginet harris | Badge ID Cost Center | Malibox Number Company Last Print Never | Recipient Location EMail Find Char | Room Classification | Department | |
| | * | Recipient | Recipient Location | | Mailbox Number | Classification | Last Printed | Group |
| | | Harris, Ivory | Neopost Field Sales | | | | Never | |
| | | Harris, David | Shipping | | | | Never | |
| | | Harris, Michael | Neopost Field Services | | | | Never | |
| | | | | | | | | Check all Group Label Print |

 Select the Recipients to have Recipient Folder Labels printed for. Check All is available at the bottom of the screen. Optionally, you can click the Label button to the left of the Recipient to manually print out their Recipient Folder Label.

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|------------------------|-------|---------------------|------------------------|-----------------------|-------------------------|----------------|--------------|-----------------------------|
| | | | C Dashboard | Receive Mail Retrieve | Manage Folders 융용 Recip | ients | | |
| < Research / Report | Manag | ge Folders | | | | | | |
| D Find Mail | | Racipient hannis | Badge ID | Mailbox Number | Recipient Location | Room | Department | |
| Received Mail Today | | | Cost Conter | Company Last Print | EMail | Classification | ~ | |
| | | | | | Find Clear | | | |
| | * | Recipient | Recipient Location | 1 | Mailbox Number | Classification | Last Printed | Group |
| | | Harris, Ivory | Neopost Field Sales | | | | Never | |
| | | Harris, David | Shipping | | | | Never | \checkmark |
| | | Harris, Michael | Neopost Field Services | | | | Never | |
| | | | | | | | 2 | Check all Group Label Print |





4. Click on Group Label Print. All the Recipient Folder Labels will then be sent to the Label Printer via SubPrint.

| 00001283 | John Tyler |
|------------|------------|
| Gamma East | |

5. Place the **Recipient Folder Label** onto your desired **Container** that will house this Recipients mail.



6. Finally, store the **Recipient Mail Folders** how you see fit. These will be used for **Receiving** and **Retrieving Recipient Mail**.



Receiving HDM Mail

The **Receive Mail** screen is used to receive all mail against Recipients inside of WTS by using **Recipient Mail Folders**. These folders are then typically placed into a **Mail Organizer** for storage. **Mail Organizers** can be anything from a filing cabinet, a shelf, etc. where these **Recipient Mail Folders** will easily be found for Receiving and Retrieving Recipient mail.



Mail is received by sorting mail into their respective **Recipients Mail Folders** (*These labels are printed and managed under Manage Folders*) and scanning the **Recipient Folder Label** that has been placed onto them or entering and selecting the Recipient from the list.

Once selected, the **Recipient, Date/Time,** and the Mail Storage Location will display in the grid below and the next **Recipient Mail Folder** can be scanned in. If an incorrect folder was scanned by accident, then the user can click the **Delete** button to remove that status event from occurring.

| by Quadient | | ☆High Density Mail | | | | | | | | | |
|-------------------|--|--|---|--|--|--|--|--|--|--|--|
| | | Co Dashboard | Receive Mail | Anage Folders 유명 Recipients | | | | | | | |
| Research / Report | Construction of the second | www.et | t can be removed by selecting the delete lo | a | | | | | | | |
| | 2 Mail Records Recipient | Received Date + | | Mail Storage Location | | | | | | | |
| | Harris, Dustin Harris, Dustin | 11/17/2022 09:26:06a 11/17/2022 09:21:37a | m | Harris, Dustin Folder Harris, Dustin Folder | | | | | | | |





The Recipient, Badge ID, Username, Mail Storage Location, and the Date/Time will be recorded upon scanning the Recipients Mail Folder and the status will be set to 'Mail Received'. Email and/or Text Messages will be sent out if a Communication Rule has been set up for the 'Mail Received' status.

What you need:

- WTS User with at least *Receive and Deliver* privileges
- **Recipient Mail Folders** printed and stored/organized. See Manage Folders in the previous section
- Workstation with a Barcode Scanner

Receive Mail Workflow

1. WTS User sorts mail into their respective *Recipient Mail Folders* and brings them to a workstation.



2. Login to WTS and click on HDM under the *App Menu*





3. Scan the Folder Label found on the *Recipient Mail Folder* using a connected Barcode Scanner. This marks the folder as '*Mail Received*'. Repeat until all folders have been scanned.

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|-------------------|--|--|---|--|
| | | Co Dashboard Receive Mail | Manage Folders 83 Recipients | |
| Research / Report | Receive Mail Select Recipient The last 20 records will display below. If a folder or recipient | 3 Int was scanned on accident it can be removed by selecting the delete icc | a | |
| | 2 Mail Records Recipient Hantis, Dustin Hantis, Dustin | Received Date + 11/17/2822 09:26.06am 11/17/2822 09:21.37am | Mail Storage Location Hanns, Dualin Folder Hanns, Dualin Folder | |

4. Finally, return the *Recipient Mail Folders* to their proper filing bin/cabinet/location so they can be easily found in the future.





Retrieving HDM Mail

The **Retrieve** screen is used to look up a Recipient by scanning their **Badge ID** or using the **Recipient Field** to display all packages that are to be delivered and/or if they have any pending mail in their **Mail Folder**. The WTS user will then scan their **Mail Folder** and any packages that are being **Retrieved** by the Recipient. This will the **Recipient Mail Folder** as **'Mail Retrieved'** and the status for each package as **'Retrieved'**. The **Signature**, **Signed By**, **Location**, and **User** are all saved against the Mail Folder for future reference.

| by Quadient | ☆ High Density Mail | | | | | |
|-------------------|---|--------------------------------------|--|--|--|--|
| | C5 Dashboard Receive Mail | Retrieve Manage Folders 😤 Recipients | | | | |
| Research / Report | Retrieve Select Recipient Recipient Recipient Recipient After selecting a Recipient, their packages will be displayed below along with their Storage Location and Recei | atterfirme | | | | |

What you need:

- WTS User with at least *Receive and Deliver* privileges
- Workstation with a Barcoded Scanner and a Signature Pad

Retrieve Mail Workflow

1. Login to WTS, click on HDM under the App Menu, and then on Retrieve. (*Retrieve is also available on the Package Tracking Toolbar if enabled*)

| WTS web | | | | | | | | Ŷ | Packa | ges | | | | | | | | Help \$ | Support Admin (| |
|------------------------|------------|-------------------|---------------|------------|------|-----------|---------------|------------|-----------|----------|-----------|--------------|---|---------------|-------------|-------|------|---------|-----------------|--------------------------------------|
| | | | 6 | Dashboard | 6 | E Receive | Multi-Receive | Verity | 6 | Retrieve | T B Deliv | er St Action | . | ႐ို Alerts ဆြ | ලි Recipien | ts | | | | |
| < Research / Report | Dashbo | oard | | | | | | | | | | | | | | | | | | > Available Widgets |
| C Find Package | hill, Pa | ckage Statis | stics | | | C | in, D | elivery Ac | ctivity | | | с | ; | hill, Ree | ceipt Act | ivity | | | c | Package V Tracking |
| Current Undelivered | * Includes | statuses where | e the Package | e was rele | ased | | 2022 | 2022 | 2022 | 2022 | 2022 | 2022 | | 2022 | 2022 | 2022 | 2022 | 2022 | 2022 | Damage Report |
| Pending Pickups | Package | Pending Deliver | ry: | | | 49 | Jun | . but | Aug | Sen | 0.4 | New | | lun | dot | Aug | Sen | 04 | New | |
| Route Manifests | Packages | Received This N | Month: | | | 11 | 14 | 138 | 20 | 16 | 29 | 15 | | 16 | 150 | 39 | 21 | 38 | 11 | G |
| Route Notes | Packages | Delivered* This | Month: | | | 15 | _ | _ | | | | | | | | | | | _ | Visit Delta Report |
| Beceived Today | Average | Time To Deliver T | This Year: | | | 2.1 Days | | | | | | | | | | | | | | Î <u>nÎÎ</u> , Deliveries by User |
| Pickup Report | | | | | | More | | | | | | | | | | | | | | IIII, Transaction Count |
| Search | c | arrier Analy: | sis | | | c | haa w | /eekly Ca | rrier Ana | lysis | | с | ; | | | | | | | illi, Vorriller Evente |
| Recipient Q | Carrier | | Teday | blass | 0.4 | Sec. | Caular | 184 | 0 14 | 5.44 | 14.6. 45 | MR 40 | | | | | | | | L. |
| | Canada | Post | Today | 0 | 1 | 0 0 | DHI | VIK- | 0 | 18-44 | 116-40 | 0 0 | | | | | | | | Received On |
| PO Number Q | USPS | | | 0 | 0 | 16 0 | FedEx | | 0 | | | 0 0 | | | | | | | | |
| | Other | | | 0 | 10 | 23 21 | LTL | | 0 | | | 0 0 | | | | | | | | 25 Delivered On |
| Tracking Number Q | | | | | | | UPS | | 0 | - | | 0 0 | | | | | | | | Demered on |
| | | | | | | | USPS | | 0 | | | 0 17 | | | | | | | | High Density V Mail |
| User Event Report | | | | | | | Other | | 10 | |) 1 | 10 16 | | | | | | | | |
| All Events ~ | | | | | | | | | | | | More | | | | | | | | |
| All Users 🗸 | | | | | | | - | | | | | | _ | | | | | | | |



2. Scan the Recipients Badge ID or manually search and select Recipient

| by Quadient | ☆Packages | | | | | | | | | nin 🌐 🎹 | 0 🚺 |
|---|--|----------------------------------|--|-------------------|--------------------------------|------------|-----------------|------------------|--|------------------|----------------|
| | | CD Dashboard | Receive 🛞 Multi-Receive | Verify | Retrieve T | Deliver | Action D Alerts | 응용 Recipients | | | |
| Research / Report Definition Find Package Current Undelivered Pending Pickups Doube Marifests @) Route Marifests @) Route Notes | Retrieve Select Recipient Requet Haris, Duth Sea an O or arter A Requet Recipient Location: Product E EMail: dustin harris@quadient.c Cell: | Q ngineering(Shipping) com | | | | | | | | Job Fun Defau | ndion Ilt V |
| Received Today | Harris, Dustin has maill Plea | se ask the Recipient if they we | ould like to pick it up. If so, you can sc | an the barcode on | their Mail Folder to mark as I | letrieved. | | | | | |
| Pelivered Today | Select Items to Retriev | ve | | | | | | | | | |
| Search | Tracking Number or Mail Record Scan Tracking Number/Mail Record or mar | d rk items to be retrieved | Print Pick List | | | | | | | | |
| Recipient Q | 19 packages Tracking Number | 1 | Received Date | | Statu | | | Storage Location | | Group | |
| | WTS000008000 | | 11/10/2022 10:50:56am | | Rece | red | | | | | |

3. If the **Recipient** has mail available for pickup, a message will be shown on the screen and their **Mail Folder** can be seen with its **Storage Location**.

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|---|---|--|--|----------------------|----------------------------|
| | 600 | shboard 🛛 😰 Receive 🛞 Multi-Receive 💅 | Verify Retrieve Carlo Reference Action | Alerts 28 Recipients | |
| Research / Report Pind Package Gurrent Undelivered Pending Pickaps Brucke Manifests Win Route Monifests | Retrieve Solect Recipient Nargent Hirris, Dustin Son p. 10 orders Anapost Recipient Location: Product Engineering(Sh EMail: dustin harris@quadient.com Cell: | <u>q</u> | | | . za Frennin Derfault ∽ |
| Received Today | Harris, Dustin has mall Please ask the Re | cipient if they would like to pick it up. If so, you can scan the ba | rcode on their Mail Folder to mark as Retrieved. | | |
| Delivered Today | Select Items to Retrieve | | | | |
| Search | Tracking Number or Mail Record Scan Tracking Number/Mail Record or mark terms to be retrie | Print Pick List | | | |
| Recipient Q | 19 packages Tracking Number WTS0000008000 | Received Date 11/10/2022 10:50:56am | Status Received | Storage Location | Group |

4. *Scan* the **Recipient Folder Label** on the container to check the box or manually check it and do the same for any **Packages** to also be retrieved. Click on *Group Retrieve*.

| Please Confirm Group Status Change | е | |
|---|-------------------------|---------------------------|
| Recipient | Tracking No. | Date Received |
| Harris, Dustin | WTS000007999 | 11/10/2022 10:44:40am |
| Harris, Dustin | WTS000008000 | 11/10/2022 10:50:56am |
| Delivery Status | | |
| Select Delivery Status Retrieved | V | |
| Select Delivery Location Product Engineering(Shipping) | Q or enter details here | |
| Capture Signature | | Release Without Signature |



- 5. Collect a **Proof of Delivery** via one of the following methods:
 - Click *Capture Signature* and have the Recipient sign for the package(s)/mail via a Signature Pad

| | | Receive | Multi-Receive | y Verify | © ■ Retrieve | T Beliver | K Action | () Alerts | 읎 뤊 Recipients | |
|---------------------|--|-----------------------------------|---------------|----------------------|-------------------|-----------|-----------------|-----------|-----------------------|---------------------------|
| Research / Report | Pleas | e Confirm | Group Stat | us Chan | ge | | | | | |
| Find Package | Recipient | | Tra | icking No. | | | Date Received | | | |
| Current Undelivered | Harris, Du | ustin | W | rs0000007999 | | | 11/10/2022 10:4 | 4:40am | | |
| 🐏 Pending Pickups | Harris, Du | ustin | W | rs0000008000 | | | 11/10/2022 10:5 | 0:56am | | |
| Prote Manifests | Deliver Select Deliver Retrieved | y Status | | ~ | | | | | | |
| Pickup Report | Select Deliver Product Er | y Location ngineering(Shipping |) | Q <u>or e</u> | nter details here | | | | _ | |
| Search | Capture | Signature | | | | | | | F | Release Without Signature |

• Click **Capture Signature** and have the **Recipient** scan their **Badge ID** in place of the signature and their name will gray out and a **physical signature will not be required or release without signature and input reason for no signature**

| ୍ଭ | |
|------|--|
| යිලි | |
| | |

• Click Release without Signature and provide the reason



HDM on the Handheld

HDM on the handheld is very similar to the site instructions.

← Action

Picked

Next Action

Reminder 1 Retrieve Package Store Package Tdel

Receive Mail 0

Next Action Schedule

Contactless Delivery Second Notification Lockers to Office

Portal User Claim Package"

Receive Mail

1. Click Action



- 2. Select Receive Mail
- 3. Scan Folder label



Retrieve Mail

- 1. Click Action
- 2. Select Retrieve

Package

- 3. Scan Student badge
- 4. Select Packages





5. Select Folder

6. Select Retrieve

7. Select Submit



8. Deliver like a normal package



