



Help

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1. DFS Help Space

Welcome to Your Go-To Resource Center

Find the Answers You Need, When You Need Them

The DFS Help Space is designed to provide clear, accessible, and easy-to-follow instructions for all the systems and services we offer.

Explore Our Comprehensive Guides



API & Web Services - Learn how to integrate with DFS Systems.



Billing - Understand DFS's billing process, invoicing structure, and how to manage postage escrow accounts.

 Link block header image

DFS Glossary



DFS Standard Offerings



Flight Status - Approved users, get real-time tracking and visibility into your work orders, ensure SLAs are met.



Portal - Navigate Portal with ease, from submitting work orders, uploading files and managing campaigns.



Vault - Manage and access important documents with our Vault system.



ZEUS Master the powerful system for work order management, automation, and workflow optimization.

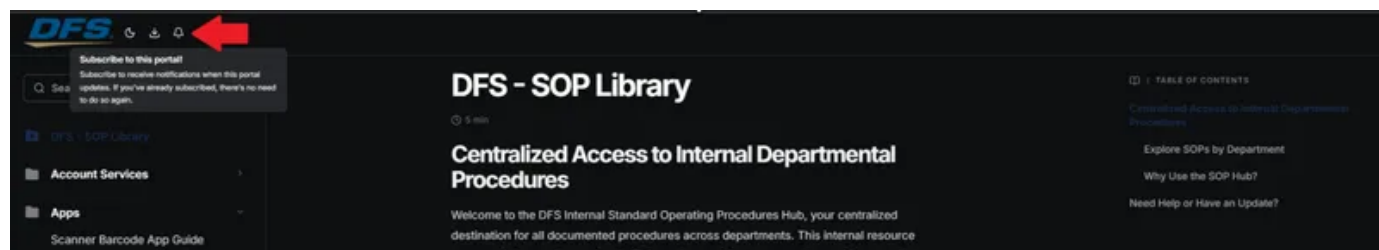
Why Use the Help Hub Space?

- **Centralized Information** - All system guides, and tools are in one place-no more hunting through emails.
- **Easy to Navigate** - Organized by system and department, so you can quickly find what you need when you need it.
- **Up-to-Date Resources** - Guides are regularly reviewed and updated to reflect the latest processes, tools, and system updates.

- **Self-Service Learning** - Learn at your own pace! This space is great for new team members, cross-training, or refreshing your knowledge.
- **Includes Visuals & Step-by-Steps** - Many guides include screenshots, demos, and clear instructions for visual learning.
- **Searchable & Accessible** - Use keywords to quickly find relevant content across multiple systems and topics.
- **Supports Compliance & Quality Control** - Following SOPs ensures we meet customer's expectations, and industry standards.

Stay In The Know

Subscribe to this Portal! To receive notifications when an update occurs, simply click on the notification icon on the top left of the page and enter your email.



Feedback & Support

Search for any Standard Operating Procedure by using the 'Ask a Question' feature at the top right-hand corner.

Submit an SOP Change Request by emailing the Tech Writing department using the links found in the Support section at the bottom of all active SOP documents.

[Email Tech Writing](#)



2. From File to Finished: The Mailroom Experience

At Document Fulfillment Services (DFS), turning a digital file into a professionally printed and mailed piece is more than just a process—it's a streamlined experience built on precision, reliability, and efficiency.

From File to Finished: The Mailroom Experience offers a clear, step-by-step look into how we handle your documents—from the moment they arrive in our system to the time they're sealed, sorted, and sent on their way.

Whether you're new to our services or simply want a better understanding of what happens behind the scenes, this guide is designed to provide insight into the workflow that drives our commitment to quality and timeliness.

Part 1: Becoming A Customer At DFS

Part 2: DFS In Action

Part 3: The Money Part

2.1. Becoming A Customer of DFS

A straightforward guide to getting started with Document Fulfillment Services (DFS)

Step 1: Let's learn about your job

We start by getting to know you and your mailing needs. Here are a few things we'll ask:

- What kind of documents are you sending?
 - We'll ask for this again later as part of setting up your jobs, it's all part of keeping your data safe.
- How often do you send them?
- How many envelopes do you mail each time?

This helps us understand what you're trying to accomplish, so we can build the right solution for you.

Step 2: Getting you a quote

Once we understand your job, we'll build a custom quote. It includes:

- Materials (like paper and envelopes)
- Labor (the work involved)
- Services (like printing, folding, and inserting)
- Postage

When you get your first invoice, there won't be any surprises.

Step 3: Making it official

When the quote looks good to you, we'll finalize things with an agreement. This makes sure:

- We're aligned on responsibilities
- Deadlines are clear
- Costs are confirmed

Once that's done, Welcome Aboard!

Step 4: Meet your DFS Team

You'll work with two key people:

1. **Project Manager** – Helps set everything up the right way.
2. **Account Services** – Your main day-to-day contact. They make sure everything runs smoothly and your needs are being met.

Need help? Contact them at AccountServices@dfsmail.com

Step 5: Show us an example

We'll ask you to send us samples of the documents again that you provided in Step 1.



We'll review it/them and offer suggestions to make sure the document works well for printing and mailing.

Step 6: We build your Custom App

Behind the scenes, we create a simple system (we call it an "app") that knows how to handle your files automatically - so there's no manual setup each time.

Step 7: You review the samples

We'll send you digital (or printed) samples from your app. This is your chance to check:

- Is the info right, correct, accurate?
- Does it look good?

If it all looks great, we're ready to go.

Step 8: Go-Live!

Your project is now active. From now on, you'll send us files and our system will take care of the rest.

In the beginning, we'll watch things closely to make sure everything runs just right.

2.2. DFS In Action

We're live, here's what's next.

Step 1: What we do with your data

Here we will explain what happens when you send a file to DFS.

1. When you send us a file we call it a "job" and that job is assigned a [Work Order ID](#) which is a tracking number for that file.
You will now be able to track this job in [Portal](#) which is our secure online platform that gives users direct access to their account with DFS.
2. Your Custom App automatically processes your file and sends reports that tell you how many pieces of mail were processed and how much paper and or envelopes were used. You will also be sent samples for you to review. If your report and samples are correct then we move on to the next step.

✓ What if something goes wrong?

What if you can't send your file?

If you are unable to send your file, please reach out to [Account Services](#) and they will help you fix whatever problem you are having.

What if your file is sent with the wrong name or sent to the wrong location?

The App will send an error message to [Account Services](#) and someone from the team will contact you and ask you to send a new file with the correct name or direct you to the correct way to send the file. When the new file is sent, the process will start again from the beginning.

What if you send a corrupt or broken file?

If there is something wrong with the file that we received, the App will send an error message to [Account Services](#) and they will work with programming to figure out what is wrong with the file. They will then contact you and work with you to resolve the issue. When a new, corrected file is sent, the process will start over from the beginning.

What if you don't receive your Report and Samples?

If you don't receive the Report and Samples in the expected timeframe, please reach out to [Account Services](#) . The team will look into what happened and work with you to resolve any issues if they exist.

Step 2: Time to print

After your job is reviewed and approved, it is made available to our Print team who will get to work on printing your job. As the job is printing, they will review the output to ensure quality standards are met.

✓ What if something goes wrong?

If we encounter any issues printing the file, our team will work internally to resolve the problem. If we require your help, [Account Services](#) will reach out to you.

Step 3: Lettershop – Where it All Comes Together



This is where we turn all of the printed paper into a piece of mail. Our inserting machines will fold the piece of mail, place it in an envelope and seal it closed to be given to the postal carrier. This happens automatically because your custom app placed barcodes on each piece of page that tells the machines which pages should go together in an envelope.

Our Insert Team watches closely to make sure the machines are doing it's job and they are always ready to step in when they need to.

✓ **What if something goes wrong?**

What if we don't have enough envelopes or other items?

Account Services is automatically notified

- If we get the item(s) from you, you are notified right away.
- If we supply the item(s) we already have more on the way.

When we get what we need or agree upon a work around, the job will be completed.

Step 4: Time to Mail

Once everything has been printed and our team ensures everything meets our quality standards, the mail is sent to a sorting facility where postage is applied and everything is mailed.

2.3. Reports and Invoices

Part 1: Prepaying for Postage

Before any mail is sent through DFS, you'll need to set up a prepaid postage account - what we refer to as a [Postage Escrow](#) account. This account ensures that funds are available in advance, so your mailings go out without delay.

Once a job is completed and mailed, the actual postage amount used is withdrawn from this account.

For a detailed explanation of how the escrow account works, how to fund it, and how to monitor balances to reconcile transactions, please refer to the [Postage Escrow Guide](#).

Part 2: Your Bills

You will receive 2 different kinds of bills: Postage Invoices and Service Invoices

- **Postage Invoices** reflect the actual postage amounts withdrawn from your Postage Escrow account. It's important these are paid promptly to ensure your account remains funded for future mailings.
 - **Service Invoices** cover the agreed-upon project costs — including things like printing, inserting, programming time, paper, and envelopes. There won't be any surprises here, as all of these details were reviewed and finalized when you became a customer.
-

Invoices and Reconciliation

Now let's take a quick look at what you can expect to see on your bill. We'll give you a brief overview of your invoices, along with the supporting reports that break down and explain each charge.

Postage Invoice

Your Postage Invoice reflects the total postage used during your billing period. In the example below, the billing period covers one full month.



Document Fulfillment Services
2930 Ramona Ave #100
Sacramento, CA 95826
+19163749002
payables@dfsmail.com

Invoice

BILL TO

Customer Name
Attn:
Customer Address

INVOICE #	DATE	TOTAL DUE	DUE DATE	TERMS	ENCLOSED
999999P	01/30/2025	\$15,502.50	01/30/2025	Due on receipt	

QUANTITY	ITEM	DESCRIPTION	UNIT PRICE	AMOUNT
1	Postage	Postage Usage January 2025 Jobs Postage for Jan 2025 Jobs See report	15,502.50	15,502.50

SUBTOTAL 15,502.50
TAX 0.00
TOTAL 15,502.50
BALANCE DUE **\$15,502.50**

Postage Summary Report

The Client Postage Summary Report sometimes called the *Postage Summary Report* provides a multi-page overview of the Total Postage used during your billing period. It breaks down postage usage by the different job types we receive from you.

In the example below, the customer has a single job called "Daily Letters".

This report shows both the dollar amount of postage used and the number of mail pieces sent, organized by each USPS Mailing Class.



Client Postage Summary

Customer Name

Document Fulfillment Services



Reporting Period

1/1/2025 to 1/31/2025

Report Date

2/2/2025

JOB DESCRIPTION	TYPE	WEIGHT	PIECES	AMOUNT
Daily Letters				
	Letter	1oz	24,375	\$15,502.500
			Total 24,375	\$15,502.500
			Total 24,375	\$15,502.500

The second part of the Postage Summary report shows the funds deposited into your Postage Escrow account during the billing period, along with any adjustments that were made during that time.





Client Postage Summary

Customer Name

Document Fulfilment Services



Reporting Period

1/1/2025 to 1/31/2025

Report Date

2/2/2025

Client Postage Summary for all Jobs

CLIENT TOTALS	TYPE		QUANTITY	AMOUNT
Deposits			1	\$16,338.200
Adjustment	Reference	Comment	0	\$0.000
	Letter		24,375	(\$15,502.500)
	Usage Total		24,375	(\$15,502.500)
	Total With Adjustments			(\$15,502.500)
			CURRENT BALANCE	(\$16,883.008)

Service Invoice

The Service Invoice includes charges for the services performed and any products used during your billing period. All pricing on this invoice reflects the terms outlined in your agreement with DFS.

In the example below, the agreement specifies one rate for printing the first image of each [Mail Piece](#), and a different rate for any additional images. It also includes a fee per envelope. Since this is a sample, each line item is shown with a \$0.00 charge for illustration purposes.



Document Fulfillment Services
2930 Ramona Ave #100
Sacramento, CA 95826
+19163749002
payables@dfsmail.com

Invoice

BILL TO

Customer Name
Attn:
Customer Address

INVOICE #	DATE	TOTAL DUE	DUE DATE	TERMS	ENCLOSED
999999	01/30/2025	\$0.00	01/30/2025	Due on receipt	

QUANTITY	ITEM	DESCRIPTION	UNIT PRICE	AMOUNT
0		SERVICE INVOICE FOR January 2025		0.00
24,375	Laser Printing	Laser Printing First (Initial) Sheet	0.00	0.00T
18,652	Laser Printing	Laser Printing (Additional) Sheet	0.00	0.00T
24,375	Envelopes	#10 Outgoing Envelopes	0.00	0.00T

SUBTOTAL	0.00
TAX	0.00
TOTAL	0.00
PAYMENT	0.00
BALANCE DUE	\$0.00

Work Order Billing Report

The [Work Order Billing Report](#) provides totals for a Service Invoice broken out by Work Order ID. It shows the number of images and mail pieces as well as the cost of postage and shipping. At the end of the report it lists a summary of the totals for envelopes and Paper for the entire billing period in addition to the Mail Piece and Image totals.

To verify or reconcile your Service invoice, you'll want to refer to the summary totals at the end of the report.

For example:

- The quantity for "Laser Printing First (Initial) Sheet" should match the "Mail Count" total since each piece of mail at least one initial sheet.
- We would then subtract the Total "Mail Count" from "Total Papers" to determine the quantity for "Laser Printing (Additional) sheets".
- The quantity for "#10 Outgoing Envelopes" is clearly listed where it says "DFS-Standard # 10 Double Window (Blue Tint)".



Work Order Billing Report
Customer Name

ZEUS

Reporting Period
1/1/2025 to 1/31/2025

Invoice #
18652

Report Date
2/2/2025

Process/Due Date	Workorder Info	Electronic Image Count	Printed Image Count	Mail Count	Postage Used	Shipping
100000 - Letters	1/4/2025 - 1/7/2025	0	183	78	\$49.608	\$0.00
100001 - Letters	1/8/2025 - 1/10/2025	0	1,494	906	\$576.216	\$0.00
100009 - Letters	1/11/2025 - 1/14/2025	0	57	21	\$13.356	\$0.00
100100 - Letters	1/15/2025 - 1/21/2025	0	2,230	1,115	\$709.140	\$0.00
100121 - Letters	1/22/2025 - 1/25/2025	0	504	504	\$320.544	\$0.00

CompletedBilled - 2/2/2025 5:05 AM

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Work Order Billing Report
Customer Name

ZEUS

Reporting Period	Invoice #	Report Date
1/1/2025 to 1/31/2025	18652	2/2/2025
100225 - Letters	1/26/2025 - 1/29/2025	0 644 414 \$263.304 \$0.00

100291 - Letters	1/30/2025 - 1/30/2025	0 24 9 \$5.724 \$0.00
------------------	-----------------------	-----------------------

100379 - Letters	1/31/2025 - 2/1/2025	0 6 3 \$1.908 \$0.00
------------------	----------------------	----------------------

TOTALS	0 43,027 24,375 \$15,502.500 \$0.00
Total Number of Work Orders	8
Total Number of Days Processed	17

Site ID	Electronic Images	Printed Images	Mail Count	Letters	Flats	Foreign	Shipping
Sacramento	0	43,027	24,375	24,375	0	0	\$0.00

CompletedBilled - 2/2/2025 5:05 AM

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Work Order Billing Report
Customer Name

ZEUS

Reporting Period	Invoice #	Report Date
1/1/2025 to 1/31/2025	18652	2/2/2025

Inventory Category	Consumption Totals	Postage Adjustments	Adj. Amount
Envelope	DFS-Standard # 10 Double Window (Blue Tint)	24,375	Total Postage Adjustments
Paper	24# White Paper	41,175	Postage Usage Breakdown
Paper	8.5 x 11 20# Plain Paper	1,852	Letter 1oz 24,375 \$15,502.500
	Total Envelopes	24,375	Postage Usage 24,375 \$15,502.500
	Total Papers	43,027	Postage Usage with Adjustments \$15,502.500
		67,402	Total Shipping \$0.00

This is a basic overview of DFS Invoices and Reports. [Account Services](#) will provide you with answers to any questions you may have regarding the use of reports to verify charges specific to your agreement.

3. API & Web Services

Document Fulfillment Services offers licensed customers use of an API to provide an alternative means of interacting with a program relevant to your implementation.

Currently, the following products have an API available:

Portal Web Services

Web Services

Webhook

SSO Integration

3.1. Portal Web Services

End Point – SOAP

URL: <http://services.dfsmail.com/services/ClientPortalService.svc>

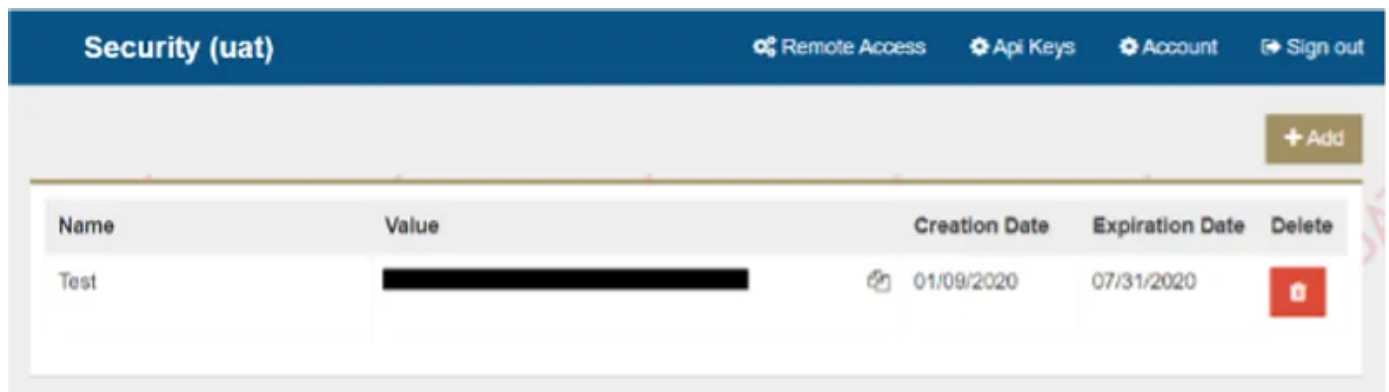
Encoding – MTOM

Upload File Size Limit – 250 MB

Token

To generate a token (API Key), the proper security role needs to be added to your user account from DFS. The API key will be linked to the specific user, therefore, that user must have proper permissions to perform actions on behalf of that customer.

- URL: <http://security.dfsmail.com/>
- Click on Api Keys menu option and click add to generate a new Token. (example below)



Name	Value	Creation Date	Expiration Date	Delete
Test		01/09/2020	07/31/2020	

Add the Token to the service reference configuration inside the endpoint section. Example:

Text

```
<bindings>
  <basicHttpBinding>
    <binding name="BasicHttpsBinding_IClientPortalService" maxReceivedMessageSize="2147483647" maxBufferSize="2147483647" messageE
      <security mode="Transport"/>
    </binding>
  </basicHttpBinding>
</bindings>
<client>
  <endpoint address="https://services.dfsmail.com/services/ClientPortalService.svc" binding="basicHttpBinding" bindingConfiguration=
    <headers>
      <token>{API KEY}</token>
    </headers>
  </endpoint>
</client>
```

Notes

- The Customer Number (Id) is required as a parameter in all the methods to avoid conflict of getting or updating information from another customer.
- To find Customers Id, use the `GetCustomers()` method the get a list of Customers and their Ids for that user.
- If the Start and End Date are sent as null it will automatically search for the last seven days.
- The maximum date range for the search is 31 days if is more than that the service will throw an exception.

Methods

//Get all the Work Orders pending for authorization for the specified customer and Job Name.

```
IEnumerable<e.WorkOrder> GetWorkOrderPendingAuthorizationByJobName (int customerId, string jobName);
```

//Approve a Work Order (Job) with pending for authorization status sending Customer Id and Work Order Id (Job Id)

```
bool AproveJob(int customerId, int jobId);
```

//Reject a Work Order (Job) with pending for authorization status sending Customer Id and Work Order Id (Job Id)

```
bool RejectJob(int customerId, int jobId, string comments);
```

//Get a list of open Work Orders (Jobs)

```
IEnumerable<e.WorkOrderDetails> GetAllWorkOrders(int customerId);
```

//Get a list of open Work Orders (Jobs) with a specific status.

```
IEnumerable<e.WorkOrderDetails> GetWorkOrdersByStatus(int customerId, string status);
```

//Get a list of open Work Orders (Jobs) with a date range.

```
IEnumerable<e.WorkOrderDetails> GetWorkOrdersByDate(int customerId, DateTime? startDate, DateTime? endDate);
```

//Get a list of closed Work Orders (Jobs) with a date range.

```
IEnumerable<e.WorkOrder> GetAllWorkOrdersHistory(int customerId, DateTime? startDate = null, DateTime? endDate = null);
```

//Get Customer current postage balance.

```
decimal GetCurrentBalance(int customerId);
```

//Get a list of postage records by date range.

```
IEnumerable<e.PostageHistory> GetPostageHistoryList (int customerId, DateTime? startDate = null, DateTime? endDate = null, string type = null);
```

//Get a list of items related to the customer.

```
IEnumerable<e.Item> GetAllItems(int customerId);
```

//Get a list of items related to the customer and contains the name sent in the parameter.

```
IEnumerable<e.Item> GetItemsByName(int customerId, string itemName);
```

//Get list of related customers to the user (Customer , Customer Name)

```
Dictionary<int, string> GetCustomers();
```

//Upload file to Portal Customers Files

```
void UploadFiles(int customerId, string filename, System.IO.Stream file);
```

Example

```
Service.ClientPortalServiceClient client = new Service.ClientPortalServiceClient();
```

```
String filePath = (@"C:\testUpload.zip");
```

```
FileStream fs = new FileStream(filePath, FileMode.Open, FileAccess.Read); client.UploadFiles(137, "testUpload.zip", fs);
```

Entities

```
public class Item
```

```
{
```

```
    public string Number { get; set; }
```

```
    public string Name { get; set; }
```

```
    public int QtyTotalAtDay { get; set; }
```

```
}
```

```
public class PostageHistory
```

```
{
```

```
    public int? Id { get; set; }
```

```
    public DateTime PaymentDate { get; set; }
```

```
    public string TransactionType { get; set; }
```

```
    public int? WorkOrderId { get; set; }
```

```
    public decimal Amount { get; set; }
```

```
    public decimal StartingBalance { get; set; }
```

```
    public decimal EndingBalance { get; set; }
```

```
    public string Reference { get; set; }
```

```
}
```

```
public class WorkOrder
```

```
{
```

```
    public int Id { get; set; }
```

```
    public string Name { get; set; }
```

```
    public DateTime CreateDate { get; set; }
```

```
    public DateTime? DueDate { get; set; }
```

```
    public string Status { get; set; }
```

```
}
```

```
public class WorkOrderDetails : WorkOrder
```

```
{
```

```
    public string StatusId { get; set; }
```

```
    public int CustomerId { get; set; }
```

```
    public string CustomerName { get; set; }
```

```
public DateTime ArrivalDate { get; set; }  
public DateTime DepartureDate { get; set; }  
public int PrintingPercentage { get; set; }  
public int InsertingPercentage { get; set; }  
}
```

3.2. SSO Integration

Introduction

Welcome to the DFS SSO Integration Guide! This guide is designed to help you understand SSO Integration and how to implement it.

What is SSO Integration?

SSO integration stands for **Single Sign-On integration**, and it refers to the process of allowing users to access multiple applications or services with **one set of login credentials** (typically a username and password). Instead of requiring separate logins for each service, SSO enables centralized authentication.

Who is This Guide For?

This guide is for individuals and/or organizations that need to access any combination of the following with DFS:

- Zeus
- Portal
- Flight Status
- Vault
- Services
- Database
- Permissions Required
- API

How to Use This Guide?

Whether you are a new or current customer, this guide will walk you through:

- Identity Provider (IdP)
- Authentication Configuration
- User Attribute Mapping
- Security and Authentication Rules
- Testing and Validation
- Support and Contact Recommendations
- Additional Considerations

How It Works

Implementing Single Sign-On (SSO) is an efficient and secure way for users to access multiple applications with a single set of credentials. Below, we outline the information we need to properly configure SSO for your organization.

Identity Provider (IdP)

- SSO requires an Identity Provider (IdP) to authenticate users. Please ensure that your organization has already set up an IdP such as Active Directory Federation Services (ADFS), Okta, Azure AD, Google Identity, OneLogin, or any other compatible identity

provider. DFS will need the following information:

- Identity Provider (IdP) Name
 - What platform are you using for SSO?
- IdP URL
 - The authentication service URL (typically something like <https://idp.example.com>).
- IdP Public Certificate
 - Please provide the public certificate that the IdP uses to sign the OpenID Connect or OAuth responses. This is necessary to validate the authenticity of the authentication responses.

Configuration for OpenID Connect (OIDC) or OAuth

Currently DFS supports OpenID and OAuth protocols. Depending on the protocol used for SSO (OpenID Connect or OAuth), we will request the following information:

OpenID Connect (OIDC)

- Issuer URL
 - The base URL of the IdP that identifies the authentication server (e.g., <https://accounts.google.com>).
- Client ID
 - The unique identifier of the client used to authenticate your application with the IdP.
- Client Secret
 - The secret key generated when registering your application with the IdP.
- Redirect URI
 - The URL where the IdP will send users after authentication.
- Scopes
 - The permissions requested to access user information (e.g., openid, profile, email).

OAuth

- Authorization Endpoint (Authorization URL)
 - The URL where users will be redirected to authorize access. This endpoint is usually something like <https://idp.example.com/oauth/authorize>.
- Token Endpoint (Token URL)
 - The URL where the application can exchange the authorization code for an access token (and optionally a refresh token). For example: <https://idp.example.com/oauth/token>.
- Client ID
 - The unique identifier obtained when registering your application with the OAuth provider.
- Client Secret
 - The secret key used to authenticate your application to the OAuth provider.
- Redirect URI
 - The URL to which the IdP will send the authorization code after the user grants access.
- Scopes

- The permissions requested by the application (e.g., read, write, profile, etc.).
- Refresh Token Endpoint (optional)
 - If you plan to use refresh tokens, the URL to obtain new access tokens using a refresh token.

User Attribute Mapping

It is important to ensure that the user attributes provided by the IdP align with what our platform requires. Common attributes include:

- Full Name
 - FirstName, LastName
- Email Address
 - Email
- User Roles
 - Roles, Permissions
- User ID
 - User ID or UID
- User Group
 - User Group, if applicable
- Please specify which attributes should be provided and how they should be formatted.

Security and Authentication Rules

To ensure a successful implementation, we need to confirm the following:

- Logout Policy
 - Are there any specific requirements for user logout, such as automatic expiration or the use of "single logout" (SLO)?
- Session Duration
 - What is the standard session duration for users in your platform? This information is important to manage sessions and expiration.

Testing and Validation

Before moving to production, it is important to perform tests to ensure that the SSO integration works correctly. We will need:

- Test Users
 - Please provide a set of users for login tests and to verify that the user attributes are being transmitted correctly.
- Testing Environment (Sandbox)
 - If you have a testing or staging environment where we can perform the integration tests without affecting the production environment, please provide the details.

Support and Contact

In case adjustments are needed or issues arise during the integration, it is helpful to have a contact within your team:

- Contact Name
 - Person responsible for configuring the IdP or SSO.

- Support Email
 - Email address for technical issue resolution.
- Phone Number (optional)
 - For faster response in case of urgency.

Additional Considerations

Estimated Setup Time

- Depending on the complexity of the integration and the availability of the required data, SSO integration may take between 3 to 4 weeks.
 - This includes testing and adjustments.
 - Note: We can add the code to support SAML, however this will take additional development time.
- Additional Documentation
 - If your identity provider has technical documentation (e.g., integration guides for OIDC or OAuth), we would appreciate it if you could share that with us for faster integration.

4. Billing

At Document Fulfillment Services, we understand the importance of accurate and efficient billing to keep your operations running smoothly. Our billing systems are designed to ensure transparency, accuracy, and ease of use, giving you full control over your financial transactions.

The following guides are designated to help you understand and navigate through the most frequently asked questions:

[Postage Escrow Guide](#)

[Postage Ledger - Report Guide](#)



4.1. Postage Escrow Guide

Welcome to the DFS Postage Escrow Guide! This guide is designed to help you understand and maintain your Postage Escrow account.

What is Postage Escrow?

Upon signed contract or agreement, DFS will request an initial postage deposit. This deposit is a minimum escrow balance that will be applied to your account for upcoming postage related jobs. This escrow reserve minimum is based on volume.

Who is This Guide For?

This guide is for any individual looking to:

- Fund or replenish their Postage Escrow
- Understand the Postage Escrow process

How to Use This Guide?

Whether you are a new or current customer, this guide will walk you through:

- Determining an appropriate postage escrow balance
- Monitoring your postage escrow account
- Funding your postage escrow account should you run negative

How It Works

Permit Indicia Process

DFS utilizes a permit indicia process for mailing through the USPS. This means we can deliver your mail to the USPS faster and more efficiently, as the indicia is applied directly to envelopes during manufacturing, eliminating the need for metering and stamps.

Postage Deposit Account Setup

DFS requires a minimum 2-month postage deposit account to be set up prior to your first mailing. This is to ensure your account at DFS always maintains a positive balance for continued mailing.

Billing Cycle

DFS bills customers 30-days in arrears for actual postage used the prior month. With standard contract terms of 30 days, that puts payment in a 60-day cycle. By paying your monthly invoices, you will be replenishing your postage account to ensure mailings continue uninterrupted.

Payment Options

DFS submits monthly invoices via email and can accept payment via Check, ACH with no additional fees, or by credit card with a standard 3.25% transaction fee.



Monitoring Your Account

DFS has a few ways for you to monitor your Postage Escrow Account:

- Our secure online Portal gives you full access to your postage ledger, showing your initial deposit amount, deductions by work order, deposits/payments made to replenish your account, as well as your Current Balance.
- With each invoice from DFS, you will receive a postage report showing your beginning and ending balance, any deposits made, and all work order deductions for the period.
- In addition to the exportable postage ledger, DFS offers a postage Usage Report that can be ran at any time on Portal. The reporting includes -by job- the type, weight, pieces mailed, and postage amount used. You'll also receive a summary of your account to assist with balancing.

Postage Reconciliation & Deposit Refund Process

Your postage account is reconciled at the end of each month. Then, at the end of the contract or relationship, your account will go through a final reconciliation to settle your account.

If all invoices are paid, you can expect a full refund for your deposit amount. If there are open invoices on your account, you would instead expect a refund of your deposit amount less any open invoices.

EXAMPLE 1:	EXAMPLE 2:	EXAMPLE 3:
Initial Deposit Amount: \$50,000	Initial Deposit Amount: \$50,000	Initial Deposit Amount: \$50,000
Postage Used During Contract: \$1,500,000	Postage Used During Contract: \$1,500,000	Postage Used During Contract: \$1,500,000
Payments Applied: \$1,500,000	Payments Applied: \$1,500,000	Payments Applied: \$1,550,000
Open Invoices: \$0	Open Invoices: \$40,000	Open Invoices: \$0
Refund Amount: \$50,000	Refund Amount: \$10,000	Refund Amount: \$55,000

Frequently Asked Questions

✓ How can I access my postage escrow account?

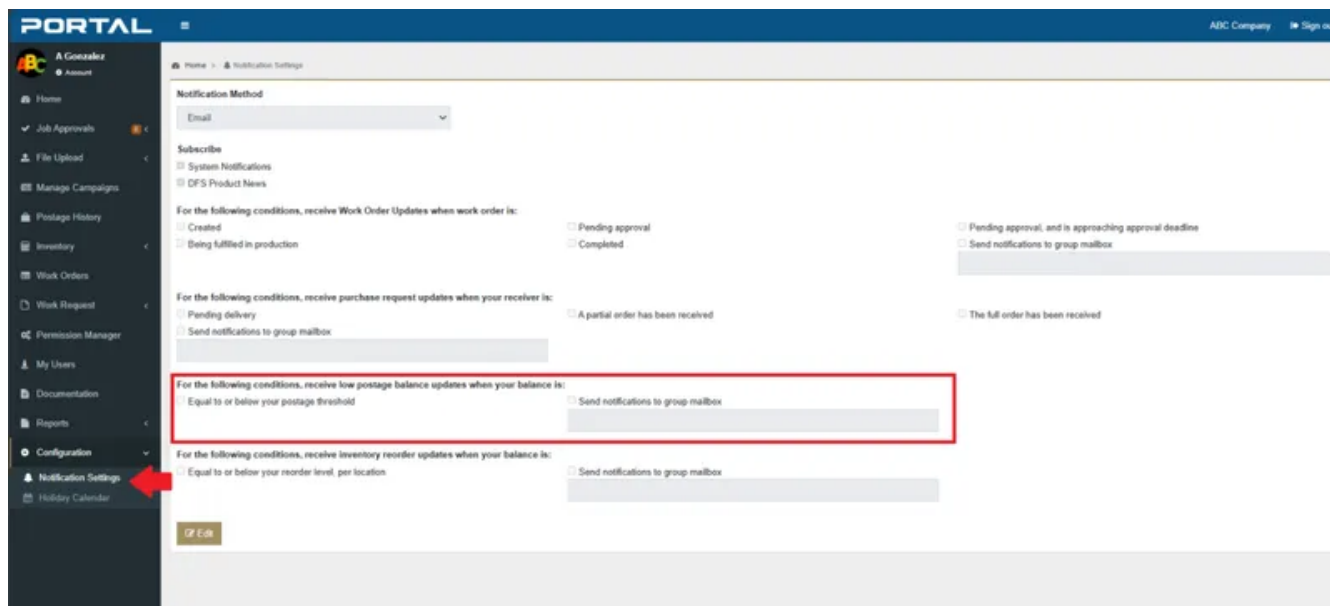
To access your postage escrow account, you must navigate to Portal. A direct link is below:

[Portal - Postage History](#)

✓ How can I prevent my account from going negative?

On Portal, we offer a variety of Notifications for your account. This includes an alert when your postage escrow account is at or below your postage threshold. This will alert you, or a group mailbox, in advance of your account going negative, giving you time to replenish your account.

Portal - Notification Settings



PORTAL ABC Company Sign out

A Gonzalez Account

Home

Job Approvals

File Upload

Manage Campaigns

Postage History

Inventory

Work Orders

Work Request

Permission Manager

My Users

Documentation

Reports

Configuration

Notification Settings

Holiday Calendar

Home > Notification Settings

Notification Method

Email

Subscribe

☐ System Notifications

☐ DFS Product News

For the following conditions, receive Work Order Updates when work order is:

☐ Created ☐ Pending approval ☐ Pending approval, and is approaching approval deadline

☐ Being fulfilled in production ☐ Completed ☐ Send notifications to group mailbox

For the following conditions, receive purchase request updates when your receiver is:

☐ Pending delivery ☐ A partial order has been received ☐ The full order has been received

☐ Send notifications to group mailbox

For the following conditions, receive low postage balance updates when your balance is:

☐ Equal to or below your postage threshold ☐ Send notifications to group mailbox

For the following conditions, receive inventory reorder updates when your balance is:

☐ Equal to or below your reorder level, per location ☐ Send notifications to group mailbox

Save

✓ How can I request an additional postage escrow invoice to fund my account?

To request an additional postage escrow invoice, or a review of your account, please contact Billing@dfsmail.com

DFS Billing

✓ Who can I contact to discuss my postage escrow account?

For any questions related to your postage escrow account, please contact Billing@dfsmail.com.

DFS Billing

 [DFS Postage Brochure.pdf](#)



▼ **Revision History**

Version Date	Updater Name	Description
March 18, 2025	Deanna Dockter	Initial draft
March 18, 2025	Angelica Gonzalez	Edits for flow and content
March 26, 2025	Deanna Dockter	Modifications from Postage Brochure

4.2. Postage Ledger - Report Guide

This quick guide is designed to assist you in generating a postage ledger report in Portal.

What is Postage Ledger?

A postage ledger is a record-keeping tool used to track postage expenses, transactions, and usage over time. This report option is available in Portal.

✓ Who is This Guide For?

Customers and administrators that need to review past usage of an account. For Budget tracking, department billing, audit support and postal efficiency.

✓ How to Use This Guide?

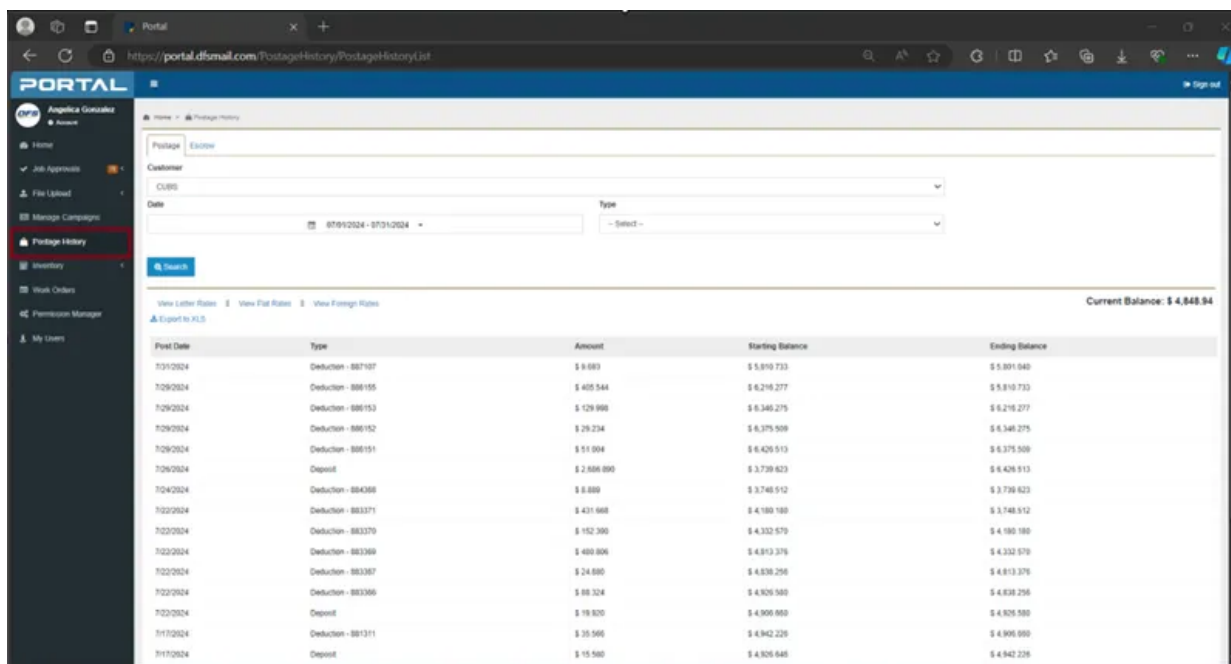
Whether you're a new or returning user, this quick guide will walk you through:

- The steps to generate a report, download and save it.
 - Monitor past postage usage.
-

✓ Postage Ledger Download Process

To view and download the postage ledger report from Portal, follow these simple steps:

1. Log into your Portal account.
2. From the main screen, go to Postage History Tab like shown below.
 1. Enter the filters based on what the customer name, date and type of transaction you are wanting to view. Or leave the Type blank to bring them all up in your search.



3. Once the desired report is pulled, simply click 'Export to XLS' to Download the Ledger to your computer.

1. Open or Save
4. Done, you're successfully pulled a Postage Ledger Report.

DFS		Postage History				PORTAL	
		Document Fulfillment Services					
Reporting Period		ABC				Report Date	
7/1/2024 to 7/31/2024						8/9/2024	
Post Date	Type	Reference	Amount	Starting Balance	Ending Balance		
7/31/2024	Deduct	999999	\$9.693	\$5,810.733	\$5,801.040		
7/29/2024	Deduct	999999	\$405.544	\$6,216.277	\$5,810.733		
7/29/2024	Deduct	999999	\$129.998	\$6,346.275	\$6,216.277		
7/29/2024	Deduct	999999	\$29.234	\$6,375.509	\$6,346.275		
7/29/2024	Deduct	999999	\$51.004	\$6,426.513	\$6,375.509		
7/26/2024	Deposit	999999	\$2,686.890	\$3,739.623	\$6,426.513		
7/24/2024	Deduct	999999	\$8.889	\$3,748.512	\$3,739.623		

Create a Support Ticket



Email Account Services

▼ **Revision History**

Version Date	Updater Name	Description
July 7, 2025	Angelica Gonzalez	Initial draft



5. DFS Glossary

Welcome to the DFS Glossary, a resource designed to help you understand key terms, phrases, and industry-specific language used within our company. Whether you are new to the team or looking for clarity on certain terms, this glossary serves as a quick reference to ensure consistency in communication and understanding across the company.

Our goal is to provide clear, concise definitions that make it easier to navigate our processes, guides, and services. This glossary will be regularly updated to reflect any and all new terms and changes in our business language.

▼ Glossary

Term	Definition
.NET	A free, open-source development platform created by Microsoft that allows developers to build and run applications for web, desktop, mobile, cloud, gaming, and IoT using languages like C#, F#, and Visual Basic.
520S	SCREEN 520S Press printer that handles printing for all work orders require roll paper stock.
Account Services	Customer facing team that collects and corresponds to customer requests and inquiries. They can be

Term	Definition
	reached at AccountServices@dfsml.com.
Active	Defines whether the item is currently in use or has been deactivated.
Accumulator	A mechanism within the AutoSET MB Inserting equipment that gathers multiple sheets of paper intended for the same recipient (keyline) into a single, ordered set. Grouping them by barcode logic that is read on the machine.
Additional Images	Refers to extra images that are processed for printing and inserting. These can include additional inserts that must be added to the original file processed.
Address Slip	Refers to the added slip page containing only the recipient's and/or sender's address and/or company logo.
Adjustment Dial	These are mechanical controls on folder machine that allows operator to precisely set and regulate the pressure between rollers. These dials are critical for achieving the correct roller tension needed to feed and fold paper accurately.
Agency	Non-DFS authorized groups that have access to assigned customers, account management and collaborate closely with DFS.
Air Compressor	Refers to the section in the printer's control interface that manages and monitors air compressor system, which is essential for several core printer functions.
Air Shaft	A hollow, expandable shaft inserted into the roll's core; inflated using air pressure to hold the roll in place during operation.
All Client Deposit Report	Lists all deposits made by clients, detailing transaction amounts, dates, and associated accounts.
All Client Invoicing Report	Provides a consolidated view of invoices issued to all clients, detailing amounts, dates, and payment statuses.
All Client Postage Balance Report	Displays the current postage balance for all clients, helping track available funds for operations.
All Customer User Report	Provides a comprehensive list of all customer users within the system, including their Agency, First and Last name as well as their email address and customer name associated with that user.
All Inventory Balance Report	Offers a snapshot of current inventory levels across all items, detailing quantities on hand and their valuation. This report aids in assessing stock availability over a specific period of time.
Alternate Format Large Print (LGP)	General large print file
Alternate Format Data Not Encrypted DEE	General file that remains open or unprotected
Alternate Format Data Encrypted (DEN)	General file format protected with encryption.

Term	Definition
Alternate Format Audio (Not Encrypted)	Audio file accessible without encryption.
Alternate Format Audio Encrypted (AEN)	Audio file protected or encoded for security.
Apollo	Oce VarioPrint 6250 Printer that handles all printing for work orders requiring non roll paper stock.
Athena	Oce VarioPrint 6250 Printer that handles all printing for work orders requiring non roll paper stock.
autoSET GRB High Speed Inserter	Refers to a fully automated inserting system designed for high-volume production environments. It collates, folds, inserts, seals Letters into envelopes, at high speeds reducing manual labor.
autoSET B4 High Speed Inserter	Refers to a fully automated mail inserting system designed for high-volume production environments. It collates, folds, inserts, seals Letters, or Flats envelopes at high speeds reducing manual labor. It combines speed, flexibility and precision.
Bad/Defective Product Adjustment	To log the quantity of damaged produced received by the Vendor, or a customer supplied item.
Barcode	A machine-readable representation of information required on all documents that are printed, inserted and mailed out of DFS.
Barcode Quiet Zone	For 2D barcodes, the quiet zone should be a minimum of one margin width on all sides of the barcode. Maintaining a proper quiet zone is essential for ensuring reliable data capture on all DFS inserting equipment.
Billable	It is to categorize if a work order is subject to charges.
Billing Template	Serves as a standardized framework for generating client invoices.
Binary Code	These are sequences of data, that is printed as a barcode that automate how our inserting machines pulls, collates, folds, inserts and sorts documents in all jobs. These codes communicate with the inserter machine's software to correctly insert mail.
BRE	Business Reply Envelope
Buffer	Refers to a section of the machine that temporarily holds and stages documents before they are moved to the inserting section. This helps with mail pieces that have more than one page, as it ensures that complete mail pieces are correctly assembled.
C = Cyan	A bright blue shade: one of the primary colors used in color mixing for printing.
C#	C# (pronounced "C-Sharp") is a modern, object-oriented programming language developed by Microsoft for building a wide range of applications across desktop, web, mobile, and cloud platforms.
Campaign	DFS offers campaign creation via Portal. A marketing image can be added to Statements, these are all images provided by the customer.
CASS	USPS - Coding Accuracy Support System is a program that verifies the accuracy of address-matching software, that helps mail standardization.

Term	Definition
Category	Refers to the type of inventory: Paper / Envelope / Inserts/ Other
Certificate of Mailing (PS Form 3817)	Is an official form from the USPS that provides proof that your mail was sent. It shows the date your mail piece(s) was accepted by USPS, but it does not include tracking or insurance. This is available for First-Class Mail, Priority Mail, and some International mail.
Certified Process	A process that is used follows USPS rules and ensures an official proof of mailing receipt as proof the item was sent. This includes a unique tracking number to monitor delivery status.
Client Completed Document	Any document(s) that a Client has sent to the DFS PO Box, instead of their County office.
Client Consumption Summary Report	Tracks the total postage and resource consumption for each client over a specified period.
Client Postage Activity Report	Logs all postage-related transactions, including refills, deductions, and usage per customer.
Client Postage Summary by WO Report	Breaks down postage usage per work order, linking costs to specific jobs for detailed tracking.
Client Postage Summary Report	Summarizes postage usage by customer, offering insights into their spending patterns for work done.
Client Work Order Activity Report	Provides a record of all work orders processed for a customer, including status updates and modifications on their jobs.
Client Work Order Summary Report	Offers an overview of completed and ongoing work orders, helping monitor workflow efficiency.
Configuration	Serves as a centralized hub for managing DFS system-wide settings, automation rules, notifications, and operational setups.
Command Workstation	A centralized job management software used to control and monitor print production on EFI Fiery servers.
County(s)	The original sender of the mail piece, which may need to update the recipient information or further action.
Create Date	Refers to the date the work order was formally initiated and recorded, marking the beginning of the process.
Current Number	Refers to a system-generated number based on the most recently created item. This number is primarily used by the programming team to reference and point to the appropriate variable inventory required for jobs that require variable inserts in production.
Customer	The stakeholder that works with DFS. The customers are the ones that generate demand and interact by placing and tracking work orders. Receiving invoices, making payments, manage customer requests.

Term	Definition
Customer Approval Date	Shows the Date and Time of when the authorized customer user approved the job for production.
Cutter	A precision device that trims the roll paper to the correct length or separates printed files; integrated with the press for inline finishing.
Daily Frequency	Refers to the schedule of when an item is set to show up on the queue to be counted. Occurs once every business day.
Dallas	Oce VarioPrint 6250 Printer that handles all printing for work orders requiring non roll paper stock.
Data Points	Refers to an individual piece of information or specific value that is collected in a statement. Each data point represents a single unit of measurement in a structured format inside a campaign.
Destroy	Refers to the action of getting rid of an inventory item using the destroy tool.
Departure Due Date	Refers to the scheduled date by which a job must leave the production floor to meet downstream deadlines such as client-specific SLAs.
DFS	Document Fulfillment Services
Direct Print	Refers to a workflow setup in programming on jobs that require more than one paper stock. This is setup to automatically pull different pagers from different trays based on the media requirement. (e.g., Page 1 from Tray 1 and Page 2-3 from Tray 2).
Divert	Refers to an automated procedure that detects and removes mail pieces from the production flow when an error or a condition is met in an inserting machine. This is a critical process that ensures accuracy, and quality of all outgoing mail.
Document # of Pages Report	Tracks the number of total documents, pages and images loaded to Vault over a specific period.
Double Feed	Occurs when the feeder accidentally picks up two or more sheets at once instead of a single sheet in the Feeder. This can result in envelopes containing incorrect or extra pages.
Due Date	The deadline by which the assigned work order or job is expected to be completed and mailed.
Duplex	Prints on both sides of the paper (front and back). Types: Long-edge binding: Like a book, flips pages side-to-side. Short-edge binding: Like a notepad, flips page top-to-bottom.
Electronic & Printed	Refers to the type of work order that involves a combination of both electronic and printed services.
Electronic Type	This type of work order is processed digitally without physical printing and inserting. These can be delivered by email, or our online portal.
Email Templates	Refers to the predesigned, reusable layout for internal emails that are setup in Zeus rules for notification purposes.
Feeder	Mechanical module designed to pick up and deliver individual sheets or inserts from a paper stack into the inserter track. It is one of the first and most critical stages in the inserting process. It separates and feeds one sheet a time.
File Name	Refers to the identifiable name given to an electronic file.

Term	Definition
FD Ticket Templates	Pre-built tickets used to create tickets quickly and consistently. These help ensure required information is captured upfront, reduce manual entry, and standardize how common requests are submitted and handled.
FLAT	A non-folded piece of mail that consists of 19-74 pages.
Flight Status	A system tool designed to track and monitor the progress of a work order as it moves through various stages in production.
Flight Status Report	Displays the summary of work performed by a production operator across departments and based on a specific date range.
Floor Count	Quantity of inventory that is stored on the production floor.
Fold Plates	Mechanical guides within the folder section that control the number, type, and position of folds (e.g., C-Fold, Z-Fold, Half Fold) applied to all documents before they proceed to the insertion station of the machine if one is available.
Foreign	International mail sent outside the domestic region.
Frequency of Physical	The scheduled interval for conducting physical inventory counts to ensure data accuracy (e.g. weekly, monthly, quarterly).
General Tab	Provides a high-level overview of the inventory item and its key identifying details. This tab displays the item name and number, a visual reference of the item, current quantity on hand, as well as other important historical details.
GSM	Grams per square meter - this metric unit is used to measure the weight and density of paper by indicating how many grams of a single square meter of the paper would weight. Higher GSM number = Heavier and Thicker Paper stock.
Hand Work	Refers to the department within DFS that focuses on inserting non-automated work that must be done by hand or with slower machinery due to inventory requirements.
Hand Work Operator	Person responsible for completing manual tasks such as hand inserting documents, collating, sorting, labeling, bundling, or packaging materials that have a higher page count and do not qualify to be mailed as Letters.
Head Cleaning	Refers to the work that is performed to remove dried ink, debris, or air bubbles from the printhead nozzles, ensuring stable jetting, proper droplet formation, and high-quality output.
HOA Stamps	HOA ordered. USPS Forever Stamps.
HOAM-9-STAMPED	HOA #9 Double Window #9 - Genetic with STAMP.
HOAMBLT-09-3WIN-STAMPED	HOA #9 Windowed Remit envelope with TRIPLE/HIDDEN Window with STAMP.
Holiday Calendar	DFS' holiday schedule with key closure dates and events in the calendar year.
Hopper	Is a mechanized tray designed to store and dispense paper (inserts) one at a time into the inserting track. Each hopper can be adjusted for different sizes and types of media and programmed to release in a precise sequence for assembly and mailing.
Householding	Refers to the programming setup of grouping documents that can be mailed out together.

Term	Definition
Image Count	Refers to the total number of impressions that are printed, front and back of a sheet of paper.
IMAGENET	The document imaging system used for scanning, recording and digitally returning images.
In Production	Refers to the status of a work order that is actively being printed or inserted.
Inactive	Refers to the action of marking an inventory item or template that is no longer used in Zeus.
Ink Fill	Refers to the controlled process of replenishing the printer's ink reservoir with approved ink cartridges/containers specific to the printer model.
Initial Order Adjustment	To add or subtract quantities for the initial receiving process, when a Receiver process is not used.
Insert Operator	Person responsible for operating inserting equipment that places printed letters, into envelopes or packages for mailing distribution. Operator reviews work orders, sets up machines, monitors accuracy and troubleshoots machine issues.
Insert - Buckslip	Refers to an Insert work order that is pushed for printing & cutting.
Insert Code	On jobs that require additional insert materials, an insert code is added to the keyline data line to aid production teams on configuring equipment to correctly call, pull and insert into the required mail piece(s).
Insert - Full Page	Refers to a full-page insert work order that must be printed, and folded inhouse. To be included with a job later.
Insert & Mail	Refers to a type of work order/job that was printed outside DFS but must be inserted, and then mailed at DFS.
Inventory	Refers to materials used to satisfy work order completion. Categories include; Paper, Envelope, Inserts, Other.
Inventory Analytics	Data-Driven Insights. This tab offers a visual breakdown of inventory trends, helping teams optimize stock levels and reduce inefficiencies.
Inventory Attachment	Refers to the visual representation of the item for reference.
Inventory History	A chronological record of all transactions related to the item, including receipts, usage transfers, and adjustments.
Inventory Ledger	Serves as a detailed record of all inventory related transactions, allowing for precise tracking of stock movements. Inbound & Outbound transactions. Adjustments. Timestamps & User Logs.
Inventory Manager	Refers to the process of tracking, controlling, and optimizing the storage, movement, and availability of materials such as paper and envelopes. It ensures that the right quantity of inventory is available while preventing overstock or shortages.
Inventory Name	Refers to a unique naming designation assigned to an item stored at DFS. This does not repeat.
Inventory Number	Refers to a unique numbering designation assigned to an item stored at DFS. This does not repeat.
Inventory Physical	Refers to the process of manually counting and verifying the actual stock held at the DFS Warehouse, ensuring that inventory records match the physical quantities on hand.

Term	Definition
Inventory Reorder	Refers to the process of replenishing stock when it reaches a predetermined threshold to ensure continuous availability. This process is crucial for maintaining operational efficiency and meeting customer demand.
Inventory Summary	An overview of the current stock levels, including quantities on hand, usage trends, and potential shortages.
Inventory Transfer	Refers to the action performed to move inventory between two locations.
Inventory Usage by Date	Refers to the tracking of inventory used within a specific period of time.
Inventory with No Attachment Report	Identifies inventory items that do not have a sample or mockup attached to them. This helps in detecting issues related to verifying correct usage.
IPM	Images per minute.
Item Description	Refers to a brief overview of the item's purpose, specifications, and key details.
Item Name	Refers to the name of the inventory item for easy identification.
Item Number	Refers to a unique identifier assigned to the item.
Job Description	This section in a work order, outlines specific job details that are unique to the type of customer and/or job type.
JobFlow	A powerful automation software designed to streamline and manage prepress and print production workflows. It allows print service providers to build custom workflows that automate repetitive tasks, reduce manual errors, and increase productivity.
Job Frequency	Refers to how often a specific inventory task or job is scheduled to be executed, whether it's daily, weekly, monthly, or based on other criteria.
Job Template	Refers to a set of parameters for a job that has been setup in the system.
Job Template Report	Offers a predefined list of various job types, streamlining the setup and execution of all jobs, active and inactive. Including gathering information broken by package.
JobID	Unique number assigned to each customer Job within Zeus.
K = Black	"K" stands for Key, which is the black plate in traditional printing. It's used to add detail, depth, and contrast.
KCMY - Color Denomination	K = Black C = Cyan M = Magenta Y = Yellow. Together, KMCY inks combine in various percentages to reproduce a full-color spectrum in printing-commonly known as CMYK printing.
Keyline	A code added to mail pieces to assist in sorting and tracking.
Last Order Date	The most recent date this item was ordered.
Last Order Quantity	The amount last purchased to track trends and replenishment needs.
LETTER	A standard letter-sized piece of mail that consists of 1-6 pages.

Term	Definition
<u>LETTERHW</u>	A standard letter-sized piece of mail that consists of 7-9 pages.
<u>LETTER6X9</u>	A half-fold letter sized piece of mail that consists of 10-18 pages.
<u>Letter Shop</u>	Refers to the team responsible for inserting all documents into envelopes in high-level operated inserting machines. Ensuring that all mail is accurately inserted and approved for mailing.
<u>Location</u>	Refers to the physical location from where the work is being performed.
<u>Machine Counter</u>	This part on the inserting machine tracks the number of processed pieces, allowing operators to monitor the production volume, identify discrepancies, and maintain accurate records.
<u>Mail Count</u>	This represents the actual number of mail pieces that were completed and prepared for mailing. This is the most accurate number used for billing, reporting, and USPS submission.
<u>Mail Piece</u>	Refers to a single addressed item of mail, like a letter, flat, or oversized piece.
<u>Mailed Date</u>	Refers to the date of when a work order was completed in the system and marked as Mailed.
<u>Mailing Class</u>	Refers to the category of mail service selected based on several factors such as costs, size, weight, and delivery speed.
<u>Mail.DAT</u>	Refers to the standardized electronic file format used by mailing industry to communicate detailed data about a mailing job in the US. Linked data files that describe: Mailing structure, postage details, piece details and other job information.
<u>Manual Adjustment</u>	To add or subtract quantities, such as customer ship back request, not associated with Waste.
<u>Marketing Mail</u>	Formerly known as Standard Mail is bulk mailing service designed for advertising, newsletters, and other correspondence that is not personal or time-sensitive.
<u>MICR</u>	Magnetic Ink Character Recognition - a specialized printing technology used primarily for printing checks and other financial documents.
<u>Missed Feeds</u>	A missed feed happens when the feeder fails to delivery any sheet during a feed cycle. This creates a gap in the document flow that can lead to incomplete mail pieces, frequent production stops and rework causing delays in the process.
<u>Month End Report</u>	Compiles comprehensive financial data at the close of each month, summarizing work order revenue, and other key metrics.
<u>Monthly Frequency</u>	Refers to the schedule of when an item is set to show up on the queue to be counted. Occurs every 1st of the Month.
<u>MyWork Report</u>	A personalized production report showing all work orders and tasks assigned to a specific Flight Status user who printed or inserted a job.
<u>NCOA</u>	USPS - National Change of Address is a service that provides a database of change-of-address records. Assisting with updating mailing lists and ensure accurate delivery.
<u>Need Customer Approval</u>	Refers to the term used when a work order requires customer authorization prior to being rolled out for production.
<u>Neopost DS 600i Inserter</u>	Refers to a high-performance automated mailing system designed to take the inserting complexity out of preparing mail. This machines folds, collates multiple pages, inserts, and seals them, while verifying

Term	Definition
	accuracy through advanced control features.
Neopost IS5000AI Meter Machine	It's a high-volume machine with key features like applying postage to mail by weighing and rating on the fly with an integrated scale and rate calculator to ensure each mail piece has the correct postage based on weight and destination.
NX Inkjet	SCREEN NX Inkjet Truepress printer that handles printing for all work orders requiring roll paper stock.
OMR Sensor	Optical Mark Recognition Sensor is designed to detect marks printed on the paper to signal/trigger where to perforate, cut, or stack the paper.
On Hold	Refers to the status of a work order that has been paused in the process by a DFS representative or at the customer's request.
One Time Frequency	Refers to the timing of when an item is set to show up on the queue to be counted. Occurs each time it is added to an inventory item and used for emergency requests.
Original Image Count	Refers to the total number of images that are processed for printing.
Output Type	Refers to the format and method of a work order. Indicating how the production process should handle, process, and distribute mail. It defines whether the job is electronic, printed, inserted, mailed, or if it is a test work order.
Over Piece	When the inserting machine camera gets a bad read and splits the mail piece into two or more sets.
OVERSIZED	A non-folded piece of mail that contains 75 pages or more.
Package	Refers to the file(s) that is setup on a work order for print and mail.
Package Type	Refers to the type of package/file that is setup in a work order for print and mail based on weight requirements. Some package types include; LETTER, LETTER6X9, FLAT, and OVERSIZED.
Pagination	Refers to the numbering and sequencing of pages within a document set. This ensures that all pages belonging to a single recipient are printed, grouped, and inserted in the correct order.
Perforation	Refers to the paper with small holes punched into it, making it easy to tear along the perforations for documents like payment stubs.
Perforator Pro	Refers to the configuration process of the TECNAU perforation module that enables the creation of horizontal/vertical perforations on printed jobs. Adjusting the blades, position, depth, job parameters, paper path alignment and sensor calibration.
Phoenix	Oce VarioPrint 6250 Printer that handles all printing for work orders requiring non roll paper stock.
Physical Adjustment	Refers to the action of adding or subtracting x amount of materials from the system to keep the on hand quantity true.
Physical Count History	Records all scheduled intervals for conducting physical inventory counts. These are all logged at an item level or in the inventory physical screen.
Pickup Requested	Refers to a section of the work order setup to show if the work order needs to be picked up for inserting.
Piece Count	This is the number of envelopes used. It represents the planned quantity before production is completed. Refers to the total number of individual letters within the work order.

Term	Definition
<u>PlanetPress</u>	A document composition and automation software designed to help businesses create, manage, and distribute dynamic, personalized, and print-ready documents.
<u>Portal</u>	Portal is our secure online platform that gives users direct access to their account with DFS. Portal offers secure file uploads, job approvals and rejections, real time production tracking, and a full postage ledger.
<u>Portal Upload History</u>	Refers to the DFS log that tracks all files, work orders, and documents uploaded to our Portal site.
<u>Poseidon</u>	Oce VarioPrint 6250 Printer that handles all printing for work orders requiring non roll paper stock.
<u>Post Date</u>	Refers to the date when the inventory transaction is officially recorded in the system and affects an inventory balance.
<u>Postage</u>	Refers to the dollar amount required to send a letter or parcel by mail.
<u>Postage Escrow</u>	A prepaid account that holds funds specifically designated for covering future postage expenses.
<u>Postage Preference</u>	Refers to the logistics' choice for mailing out a specific job. Choices include; Commingling, USPS, UPS, FedEx, and UPS.
<u>Postage Rate Manager</u>	Refers to the centralized section inside Zeus that manages and applies accurate postage rates to all jobs based on the different rate types of mail; Letters, Flats, and Foreign rates.
<u>Postage Usage by Date</u>	Refers to the tracking of postage funds used within a specific period of time.
<u>Postage Usage by Date Report</u>	Tracks and reports on postage expenditures over specific timeframes, aiding in budget management and forecasting.
<u>Postcards</u>	This type of work order involves printing and mailing out postcards.
<u>PostalOne!</u>	Refers to the USPS online business platform that allows mailers to manage and submit mailing documentation electronically. Replaces manual hardcopy paperwork for mailings. Submits and manages postage statements and Mail.DAT files.
<u>PR Number</u>	Refers to a system-generated unique identifier assigned to each purchase request within Zeus.
<u>Print Color</u>	Refers to the color requirement of a file printed. Options include, Black & White, or Color.
<u>Print Files</u>	Refers to a digital file intended for printing, inserting, and mailing. Ensuring consistent formatting and appearance across different printers.
<u>Print Mode</u>	Determines how a print file must be printed; One-Sided or Two-Sided.
<u>Print Operator</u>	Person responsible for setting up, running, and maintaining printing equipment to produce work order output. Preparing jobs, monitors quality, troubleshoots issues while using the Flight Status system.
<u>Print Traveler</u>	Detailed document that physically and digitally follows a job through the entire DFS process. It details WO name and number information, as well as other important requirements to successfully complete the job.
<u>Printed Type</u>	This type of work order is physically printed, inserted, and then mailed out through several distribution methods; USPS, FedEx, UPS, Commingling.

Term	Definition
<u>Printing</u>	Refers to the team responsible for printing all documents in high-level operated printing equipment. Ensuring that all mail is accurately printed and is approved for the next stage in the production process.
<u>PRISMAsync Remote Manager</u>	It's a centralized, remotely accessible hub, giving print operators the tools to stay productive, efficient, and in full control of the jobs once sent to any of the Canon printers.
<u>Production</u>	Refers to the division within DFS that is responsible for printing, inserting and mailout letters. The production department ensures that all mail is accurately printed, properly inserted into envelopes/boxes, and mailed on time.
<u>Production Job #</u>	Refers to the number assigned to a job to be set up for printing and inserting equipment. This is setup in Zeus and visible in every work order for operator handling.
<u>Production Lead</u>	Leader responsible for overseeing daily production activities, and setting up jobs accurately, and based on priority. First in line for operators related escalations with work orders, and communication with upper management.
<u>Production Supervisor</u>	Responsible for overseeing production operations, leading teams, and ensuring performance, quality, and efficiency goals are consistently met. Provides direction, coaching, and coordinates with other departments to align production flow.
<u>Programming</u>	The department within DFS that sets and maintains coding standards, as well as managing customer/job specific code.
<u>Purchase Request</u>	The electronic entry submitted by a customer, administrator or vendor to request the procurement of inventory.
<u>Quantity On Hand</u>	Current system-recorded stock level for that inventory item.
<u>Quarterly Frequency</u>	Refers to the schedule of when an item is set to show up on the queue to be counted. Occurs every 1st of each Quarter.
<u>Ready for Inserting</u>	Refers to the status of a work order that is fully done printing, the work order is now ready to be inserted.
<u>Ready for Mailing</u>	Refers to the status of a work order that has been fully printed, fully inserted, this work order has passed all verification requirements and is approved for mailing.
<u>Ready for Production</u>	Refers to the status of a work order that is ready for the first stage in the production process. Also known as 'Ready to Print'.
<u>Receiver</u>	A transaction completed in Zeus to record a shipment arriving.
<u>Regenerate</u>	Refers to the action of recreating or rebuilding the listing based on current requirements.
<u>Returned Mail</u>	Any mail that is undeliverable and sent back to DFS.
<u>RISO</u>	RISO Inkjet Color printer that handles printing for Direct Print jobs, as well as work orders that require color printing and shelf stock.
<u>Roller Tension</u>	Refers to the amount of pressure applied between and the rollers that feed, guide, and fold the paper through the machine. The tension controls how tightly or loosely the rollers grip the paper as it moves through each stage of the folding process.

Term	Definition
<u>RoHs Compliant</u>	Restriction of Hazardous Substances. The materials used in its circuit boards, wiring, and plastic parts don't contain high levels of harmful chemicals. It's safer to handle, better for recycling, and environmentally friendly compared to others.
<u>RTB</u>	Return to Board
<u>RTB (300 - CBNM)</u>	California Board of Naturopathic Medicine
<u>RTB (400 - BRN)</u>	Board of Registered Nursing
<u>RTB (500 - BPM)</u>	Podiatric Medical Board of California
<u>RTB (700 - RCB)</u>	Respiratory Care Board
<u>SCREEN NX Inkjet TruePress</u>	Refers to a production-grade digital press that can print out at high-speeds while handling variable data on the fly. Streamlining production operations, from roll to cut-sheet, for greater efficiency.
<u>Segment Rollers</u>	Rollers that are divided into multiple "segments", each of which can operate together or individually. They ensure even contact and consistent tension across the width of the sheet; they guide and transport paper through folder plates and rollers.
<u>SFTP</u>	Secure File Transfer Protocol is a way to safely send and receive files over the internet.
<u>Shut Down</u>	Refers to the controlled procedure used to safely power down the printer at the end of a production cycle shift.
<u>Simplex</u>	Prints on One-Side of the paper only. Usually the Front side of the page.
<u>SLA</u>	Service Level Agreement
<u>Special Instructions</u>	Often added to work orders to provide specific department directions or notes that clarify or modify the standard operating procedures for a task, ensuring it's completed accurately.
<u>Splice</u>	The process of connecting the end of one roll paper to the beginning of a new roll to allow continuous operation without stopping the press.
<u>Standard Printing (Fiery Command)</u>	Refers to the process of sending print files (PDFs) through a RISO print management software where operators can control and customize print settings such as paper type, color profiles and finishing options. It allows users to preview and organize files.
<u>Start-Up</u>	Refers to the sequence of steps taken to safely power on and prepare the 520S printer for operation.
<u>Statement Layout</u>	Refers to the structured format and design of a statement. It defines how information is presented on the document when creating a campaign.
<u>Tags</u>	An additional identifier that is attached to a work order, or file, to facilitate quick identification, tracking, and organization.
<u>Tap Test</u>	Refers to a method that involves tapping the mail piece on all sides to verify that the delivery address remains visible within the window, with a 1/8-inch clearance on all sides. This is to prevent the mail from being mis-sorted during the automation process.
<u>Test - Printing & Inserting</u>	Used for quality control and verification before full production. This type of work orders refers to jobs that must be printed and inserted into envelopes but not shipped/mailed out.

Term	Definition
Test - Printing & Shipping	Used for quality control and verification before full production - This type of work orders refers to a test batch that is printed and then shipped to verify both the print & delivery processes.
Test - Printing Only	Used for quality control and verification before full production - This type of work orders is a trial run of printing without inserting or mailing.
Test - Printing, Inserting, & Shipping	Used for quality control and verification before full production. This type of work orders includes a full test run of printing, inserting, and shipping to check the entire workflow.
Test - Processing Only	Used for quality control and verification before full production. This type of work orders is data handling and processing without physical printing. This ensures data formatting, and when applicable, workflow automation.
Threshold	Refers to a predefined value (or limit) that acts as a trigger for CalSAWs processing used during high volume runs.
Ticket	Refers to the digital record required by DFS to manage and track customer inquiries, issues, or requests for assistance, allowing for organized and efficient customer support.
Total Postage	Refers to the sum of postage funds used in a work order, report based on date range.
TOF Mark	Refers to the printed indicator that signals the beginning of a new page within the printed roll for accurate alignment.
TP	Twin Printer or Twin Performance Mode. Refers to the printer using two imaging engines working in tandem - one for each side of the sheet. (Duplex printing)
Transferred	Refers to the history of moving a work order from one location to another approved location for printing, inserting and mailing.
Turnaround	Refers to the time it takes to complete a task or work order, from initiation to completion.
Under Piece	When a double stuff occurs or if a mail piece is removed before the "sets" counter in the inserting machine.
Unwinder	A motorized unit that holds and feeds rolls of paper into the press; regulates tension and ensures smooth feeding.
Users Audit Report	Logs all system authorized usernames, roles and permissions.
USPS	United States Postal Service
Vacuum	Refers to a suction-based mechanism used to pick up and separate individual sheets of paper from a stack. It plays a crucial role in ensuring accurate, consistent, and reliable feeding.
VarioPRINT 6330	This is part of Canon's VarioPRINT 6000 TITAN series, designed for high-volume, monochrome production printing. This assists with setting up the Media, Preferences, Workflows, Configuration of the overall printer.
Vault	Vault is a system that provides a secure, convenient, and seamless way to store and manage your documents, payments and personal information.
Vendor	Outside entity that works with DFS with providing product.

Term	Definition
<u>Waiting for Quality Control</u>	Refers to a work order that is idle waiting for QC approval from a Shift Supervisor. This status can be active at every stage in the production process. Before or after printing, before or after inserting, before the job mails.
<u>Warehouse</u>	Warehouse is a department within DFS responsible for the receiving, storing, managing, and operating Zeus system to ensure inventory levels are accurate.
<u>Warehouse Count</u>	Quantity of inventory that is stored in the warehouse space.
<u>Waste Adjustment</u>	To add or subtract waste caused by damage from printing or inserting a job.
<u>Waste Paper</u>	Refers to any printed or unprinted paper that is rendered unusable or unsuitable for its intended purpose during the production process. This includes paper that must be discarded due to errors, malfunctions, or setup processes.
<u>Webbing</u>	Refers to the process of feeding roll of paper, known as a "web", through the press. This is all managed by a series of rollers that keep the paper taut or stretched as it travels through the machine.
<u>Weekly Frequency</u>	Refers to the schedule of when an item is set to show up on the queue to be counted. Occurs every Monday.
<u>WIP</u>	Work-in-Progress status, indicates if the item is currently being used in an active work order in production.
<u>Wiper Cleaning</u>	Refers to the work that is performed to wipers that over time, accumulate ink buildup, dust, and paper fibers. Which can interfere with effective head cleaning and cause streaks, smudging, or nozzle blockage.
<u>WO - Transfer Batch</u>	Refers to the task of reassigning multiple work orders' location by using Flight Status, all at the same time.
<u>Work Order</u>	Refers to a paper/electronic request to perform work on a specific job. It provides detailed instructions on what needs to be done, with what inventory materials, and by when.
<u>Work Order Adjustment</u>	To log the quantity of inventory that was not recorded accurately by a work order.
<u>Work Order Attachments</u>	Refers to files or documents added to a work order to provide additional information, such as sample files, and reports.
<u>Work Order Billing Report</u>	Generates a summarized listing of individual work orders, over a specific period of time ensuring accurate invoicing based on completed and verified work orders.
<u>Work Order Color Code</u>	Refers to the identifier that is preset to id jobs with certain criteria. Such as Logistics; FedEx, UPS vs. Commingling.
<u>Work Order Description</u>	It provides a short detail explanation of the job to be performed within the work order.
<u>Work Order History</u>	Refers to a record of all activities and details associated with a specific work order, from its creation to completion, including status updates, inventory used and any relevant notes.
<u>Work Order ID</u>	Refers to a unique numeric identifier assigned to a job for record purposes.

Term	Definition
Work Order Name	Refers to a unique identifier assigned to each job to distinguish it from others in the system. This assists with managing job setups according to their requirements.
Work Order Pickup Report	Refers to a report that is emailed out when a job is scheduled for pickup.
Work Order Status	This indicates a work order's current stage in the process. (In progress, completed, and cancelled).
Work Produced by Date Report	Documents the volume and details of work completed within designated periods, facilitating a productivity analysis.
Year End Frequency	Refers to the schedule of when an item is set to show up on the queue to be counted. Occurs every 1st of December.
ZEUS	Zeus or Zero Errors Users System, refers to the DFS proprietary enterprise system used for job or work order tracking, inventory control, billing, and documentation purposes.
Zeus Internal Ticket	Refers to a work order related issue. Each ticket identifies a specific issue that needs a resolution before the work order can go to a Verified status.
Zeus Rule	Refers to the process of configuring or defining rules, that dictate how actions are handled based on the specific condition and criteria. Often used to update mass work order updates.

Revision History

Revision Date	Updater Name	Description
March 6, 2025	Angelica Gonzalez	Initial draft
July 8, 2025	Angelica Gonzalez	Final review
February 17, 2026	Angelica Gonzalez	Edits to list



6. Flight Status

Mission Control for Production Work Orders

Flight Status is a powerful, real-time tracking and visibility platform built by DFS. This system provides control and transparency over all work orders as they move through different stages of the production process.

Track. Manage. Execute.

Flight Status transforms the way production operators handle work orders by providing a centralized digital hub that keeps everything organized and up-to-date.

Why Flight Status?

- **Clarity** in every work order status
- **Accountability** from all operators handling a work order
- **Speed** in detecting issues before they escalate
- **Confidence** that every work order stays on course

For DFS Production Operators

For a complete list of documentation that supports users see: [Flight Status](#)

Key Features at a Glance

- **Real-Time Visibility** - Instant updates as work orders move through each production stage - know where every work order stands without asking.
- **Digital Work order Hub** - Authorized production operators get a clean, intuitive interface to view, and manage work order efficiently.
- **Stage-by-Stage Tracking** - Easily track work orders from initial print queue to insertion, and final prep for mailing - no steps missed, no delays unnoticed.
- **Role-Based Access** - Ensure the right people have access to the right tasks. Only authorized users can view and modify work orders.

Support & Training

New to Flight Status? DFS offers internal self-training guides and support to ensure new users have all the tools they need to fully use the system to their advantage.

[Submit a Support Ticket](#)

Your Work Order. On Track. Every Time.



7. DFS Standard Offerings

In this section you will learn about what DFS has to offer for your job needs. We cover all mailing types, from USPS First Class to Certified, to FedEx and UPS. Offering a full suite of standard envelopes, for whatever your job entails!

[Sample Customer Reports](#)

[Delivery Options](#)

[Privacy Policy](#)

[DFS Overview](#)

[Document & Mail Standards](#)

7.1. Sample Customer Reports

Introduction

This document outlines the types of customer reports available, the standard delivery format, and options for customization. It ensures clarity on what customers can expect and how special requests are handled.

Available Reports

Report Type	Purpose	Standard Format	Custom Options	Notes
NCOA (National Change of Address) Report	Provides updated address information using USPS Change of Address data	.CSV	Alternative delimiters - custom fields (pending programming review)	Helps reduce undeliverable mail and increase postal savings.
Certified Report	Confirms addresses are standardized and deliverable per USPS requirements	.CSV	Alternative delimiters - custom fields (pending programming review)	Ensures address list accuracy and compliance with USPS standards.

Samples

 111112-Sample_Certified_Report.csv	
 111112-Sample_NCOA.csv	

Standard Report Format

- Default Format: .CSV
- Alternative Delimiters: Upon request, reports can be provided using other delimiters.
- Delivery method: Secure file transfer of customer-specified method.

Customization Options

- Customers may request additional fields or data elements in their reports.
- All custom field requests are reviewed by the Programming Team for feasibility and approval.
- Approved requests may require additional setup time and may impact turnaround.

Request Process

- Customer submits request through the Account Service team.
- Standard format reports are provided unless a different delimiter or custom field set is required.
- Programming reviews any customization requests.
- Upon approval, reports are generated and delivered as agreed.



Service Standards

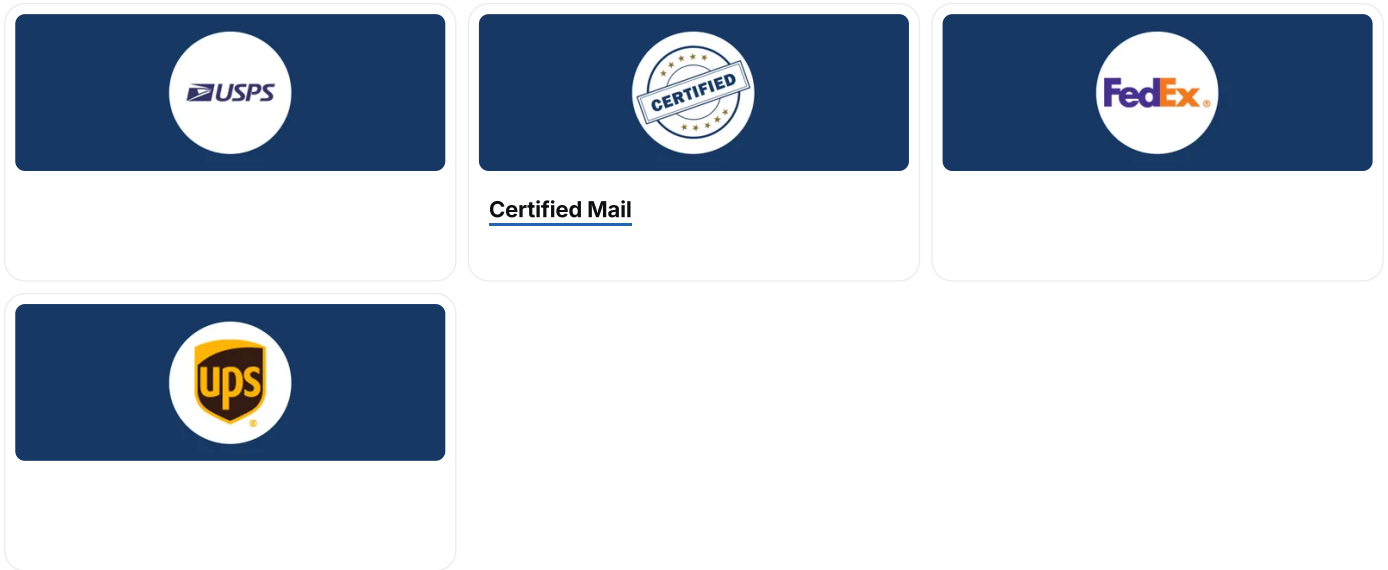
- Turnaround Time: Standard reports are delivered within the normal job completion timeline.
- Custom Requests: May extend turnaround based on complexity and programming requirements.

Contact Information

For report delivery questions, format changes, or custom field requests, please contact your Account Service team.

[Submit Request](#)

7.2. Delivery Options





7.2.1. Certified Mail

Introduction

If you're looking to send your mail out Certified, with or without signature, you are in the right place! DFS offers an automated solution to the entire process - completely eliminating the green card process. Your labels will be auto generated, no more hand writing addresses! You also have the option to manually pull tracking updates or connect with APIs for seamless updates!

What is Certified Mail?

Certified Mail is a service option from the USPS, providing the sender with a mailing receipt, a tracking number with full history, and delivery confirmation with signature options. This service can be used on Letters (#10 and 6X9) as well as Flats (9x12) and Priority Mail.

Who is this guide for?

This guide is for Customers who want to use DFS services to:

- Automatically generate USPS Certified Labels to deliverable addresses.
- Setup manual or API processes to receive Certified Tracking Updates and Signatures.

How to use this guide?

Whether you are new to Certified Mail, or a seasoned sender, this guide will walk you through:

- How DFS generates Certified labels & tracking numbers.
- USPS Address Processing & NCOA requirements.
- Your preferred handling options for Undeliverable Mail.
- How you can obtain Status Updates & Signatures.

Getting Started

To get started, you will need to be a current customer of DFS. If you are an existing customer you can request a new job by contacting AccountServices@dfsmail.com.

If you are a new customer looking for mailing services, please contact your Sales Rep directly or submit an inquiry to Sales@dfsmail.com to discuss onboarding!

USPS Requirements & Options

- DFS can run your addresses through the NCOA Database before generating Certified Labels.
 - NCOA is a fee based product, however it has the most up to date addresses with Move Updates from the USPS allowing for better delivery.
 - NCOA requires a minimum of 100 unique addresses.



- CASS will run instead of NCOA, either by customer choice or if the job fails to meet the minimum record count of 100 unique addresses.
- Addresses must have a successful Delivery Point Validation to generate Certified labels.
 - <https://postalpro.usps.com/address-quality/dpv>

DFS Options - How Certified Works

DFS Processing Flow

- You transmit your address list/job files to DFS via Portal or SFTP.
 - Address List (XLS, CSV, TXT, etc.) plus the notice(s) to be sent, or
 - Job Files such as a precomposed PDF
- DFS automation retrieves your file and:
 - Assigns a unique work order number to track your Job
 - Your addresses are then ran against the USPS database & processes to generate Certified Labels & Tracking Numbers
 - If the supplied address is valid, with an associated DPV, a Certified Label will be generated.
 - If the address is invalid, you can choose to
 - **Downgrade** to First Class Mailing; no tracking, no signatures or,
 - **Flag for No Mail;** the address will be listed on an Exception Report and the piece will not be printed, nor mailed.
- Samples of your job along with reports including tracking numbers, will be provided back via our secure online Portal.
 - You will be required to review and approve your job before printing & mailing occurs.
- Your approved job is now set for mailing from DFS via USPS Certified Mail!

Mail Piece Tracking & Signature Updates

- You can obtain Tracking Reports & Signatures 2 different ways:
 - Manually download Tracking Reports & Signatures via a third-party website.
 - Request DFS-API Automation to retrieve Tracking Updates & Signatures on a scheduled basis
 - Reports & Signature Files to be loaded to an SFTP site
 - DFS can post to our hosted SFTP for your retrieval
 - Or we can deliver to a Custom SFTP location

Examples

Certified Labels

Labels are generated automatically and printed on a standard sheet of paper. All required information to track & deliver is contained within the barcodes applied; eliminating the need for green cards.



DFS
2930 RAMONA AVE. #100
SACRAMENTO CA 95826

999999

VOID- DO NOT MAIL -VOID

2025-02-10

95826

C4013161

Retail

2.0 OZLTR



0901000005390

USPS CERTIFIED MAIL™



9414 0000 0000 0000 0000 00



John Smith
1234 Main St
Anywhere, CA 99999-9999

Certified Envelopes

DFS offers 3 custom envelope solutions for Certified Mail.

- #10.5; Large Single Window - USPS Approved!
- 6.5X9.5; Large Single Window - USPS Approved!
- 9X12; Large Single Window - USPS Approved!

CERTIFIED MAIL



Reporting Options

Initial Reports

DFS will always provide an initial report containing Recipient Name, Address, and Tracking Number. This report is posted to Portal with every file successfully processed at DFS for Certified Mailing.

In addition to the initial tracking report, DFS will provide a Processing Summary noting the total mail pieces, total images, and expected materials to be used (Envelopes, Paper).

Tracking Updates & Signature Files

API Process

If you choose to connect to the USPS with DFS APIs, you will be able to:

- Receive automated reporting at an ongoing, scheduled date/time of your choosing
- Receive signature files for successful deliveries at an ongoing, scheduled date/time of your choosing.



-
- Determine the location you receive these files
 - DFS SFTP
 - Custom SFTP
-

Manual Process

If you opt out of the API process, you will be provided with login credentials to a third-party website. This website will allow you to:

- Track all Certified mail sent via DFS
 - Track specific pieces for status or delivery
 - Download one/many/all available Signatures of Delivery
 - Run reporting specific to your needs, using available filters.
-

Requesting Certified Job Setup at DFS

Now that you know how DFS manages your mailing for USPS Certified using fully automated processes, we hope you are interested in utilizing our services! To get started;

- Contact your Sales or Account Services Representative.
 - If you are unsure who to contact, please reach out to AccountServices@dfsml.com. One of our team members will be ready to assist!
- Have available:
 - Estimated Mail Pieces sent Certified Monthly/Annually
 - Tentative Mailing Schedule (Daily, Weekly, Monthly, Other)
 - Test Files if available, or an overview of what your input to DFS will be (Address Data File(s), or prepared mailings such as PDFs)
 - DPV Failure Option: Downgrade or No Mail
 - Reporting Option: API or Manual-Web Based

7.3. Privacy Policy

BIT California, LLC, a California limited liability company, doing business as Document Fulfillment Services ("DFS," "we," "us," or "our"), provides this Privacy Policy on behalf of itself, its parent, subsidiaries, and affiliates.

This Privacy Policy explains how we handle personal information in two contexts:

- Our service operations performed for business customers
- Our corporate website and marketing activities

This Privacy Policy is intended to align with a SOC 2 Type II control environment by clearly describing data handling, retention, and accountability boundaries. This Privacy Policy does not replace contractual terms (including confidentiality, data protection, and security obligations) agreed to with a customer.

1. Scope and roles

Service operations (Customer Data)

In performing contracted services, DFS may receive files or data from a customer that can contain personal information about the customer's end users or recipients ("Customer Data"). DFS processes Customer Data only to perform the services the customer has contracted for. The customer remains the controller (or business) for Customer Data, and DFS acts as a service provider or processor.

DFS is not the custodian of Customer Data for purposes of individual access, correction, deletion, portability, or similar requests. Requests and disputes related to Customer Data must be directed to the customer. If we receive such a request directly, we will refer the request back to the customer, unless required by law.

Website and marketing

When you visit our corporate website, we may collect certain information automatically (including through cookies) and use it for marketing, analytics, and to better understand and engage prospective business customers.

2. Information we collect

A. Service operations

DFS does not seek to collect personal details about individuals for its own purposes in service operations. However, Customer Data provided by the customer may include personal information (for example, names, addresses, account-related fields, or other information the customer includes in production files).

B. Business contact information

We may collect business contact information, such as:

- Name, business email, business phone number
- Company name, job title, department
- Communications and correspondence with DFS (including support requests and onboarding communications)

C. Website data, cookies, and identifiers

When you use our website, we may collect:



- IP address and approximate location derived from IP
- Browser and device information
- Pages viewed, links clicked, referral URLs, and timestamps
- Cookie identifiers and similar tracking technologies

We use cookies and related technologies and may attempt to identify or associate a website visitor with a business contact or company for marketing purposes. We may also use marketing automation and enrichment vendors to augment or enrich website and cookie-derived data to improve marketing insights and outreach.

3. How we use information

A. Service operations

We use Customer Data only as needed to perform the contracted services, including:

- Intake, validation, preparation, production, and fulfillment workflows
- Operational support and issue resolution related to a work order
- Service quality checks and production integrity activities
- Customer-requested reproductions or reruns within the retention window (when applicable)

DFS does not sell Customer Data and does not use Customer Data to market to the customer's end users.

B. Business operations and relationship management

We may use business contact information to:

- Respond to inquiries and provide customer support
- Manage onboarding, account administration, and billing communications
- Maintain business records and operational documentation

C. Website and marketing

We may use website data to:

- Operate and secure the website
- Measure website performance and campaign effectiveness
- Identify prospective business customers and conduct business-to-business marketing
- Enrich marketing data using third-party marketing automation and enrichment vendors

4. How we share information

A. Service providers and vendors

We may share personal information with vendors who provide services to DFS, such as:

- Website hosting, analytics, and security providers
- Marketing automation and enrichment vendors (for website visitor and marketing data)
- IT, monitoring, and support tooling providers



We require vendors to protect information and to use it only to provide services to DFS, consistent with applicable agreements.

B. Customer-directed disclosures

We may share information as directed by a customer, consistent with our contract, for example to support a customer workflow or request.

C. Legal and compliance

We may disclose information if necessary to comply with law or legal process, including subpoenas, court orders, or other lawful requests, or to protect the rights, property, and safety of DFS, our customers, or others.

D. Corporate transactions

If DFS is involved in a merger, acquisition, financing, reorganization, bankruptcy, or sale of assets, information may be disclosed as part of that transaction subject to appropriate confidentiality protections.

5. Data retention and deletion

Customer Data retention

DFS retains Customer Data only for as much use and as much time as needed to perform the contracted services. As a standard practice, DFS purges Customer Data no later than 45 days after work order completion, unless:

- A customer contract requires a shorter retention period (in which case the contract controls), or
- We are required to preserve information due to a legal obligation (including a subpoena or similar legal process), legal hold, or to comply with applicable law

Website and marketing data retention

We retain website and marketing data for as long as reasonably necessary to support marketing, analytics, security, and business recordkeeping, subject to applicable law and our internal retention standards.

6. Individual rights and requests

Customer Data requests

DFS is not the custodian or controller for Customer Data. Any request to access, correct, delete, or otherwise exercise rights over Customer Data must be directed to the customer that owns the relationship with the individual. If DFS receives a request regarding Customer Data, DFS will refer the requester to the customer and may notify the customer of the request where appropriate.

Website and business contact data requests

Depending on your location and applicable law, you may have rights regarding personal information we control in a business contact or website context. You may contact us as described in Section 12.

7. Cookies and marketing choices

You can control cookies through your browser settings and, where available, consent or preference tools on our website. Disabling certain cookies may affect website functionality. You may also opt out of certain marketing communications by using the unsubscribe



mechanism included in those communications.

8. Data security

DFS maintains an information security program designed to protect Customer Data and other information. Our safeguards are intended to be consistent with a SOC 2 Type II control environment and may include administrative, technical, and physical controls such as access controls, least privilege, monitoring, and security incident response procedures.

No method of transmission or storage is completely secure. We work to maintain appropriate safeguards, but we cannot guarantee absolute security.

9. Data transfers

DFS primarily operates in the United States. If information is transferred across borders, DFS will take steps designed to maintain appropriate protections consistent with applicable law and contractual obligations.

10. Children's privacy

Our services and website are intended for business use and are not directed to children. We do not knowingly collect personal information from children.

11. Changes to this Privacy Policy

We may update this Privacy Policy from time to time. The "Last updated" date reflects the most recent revision. If we make material changes, we will post the updated policy on our website and may provide additional notice where required by law.

7.4. DFS Overview

This section is an introduction to DFS. We will highlight our staticstics and capabilities as well as introduce you to our team.



 [DFS Statistics & Capabilities](#)
[Overview](#)



[Meet the DFS Team](#)

7.4.1. DFS Statistics & Capabilities Overview

Established: 2002

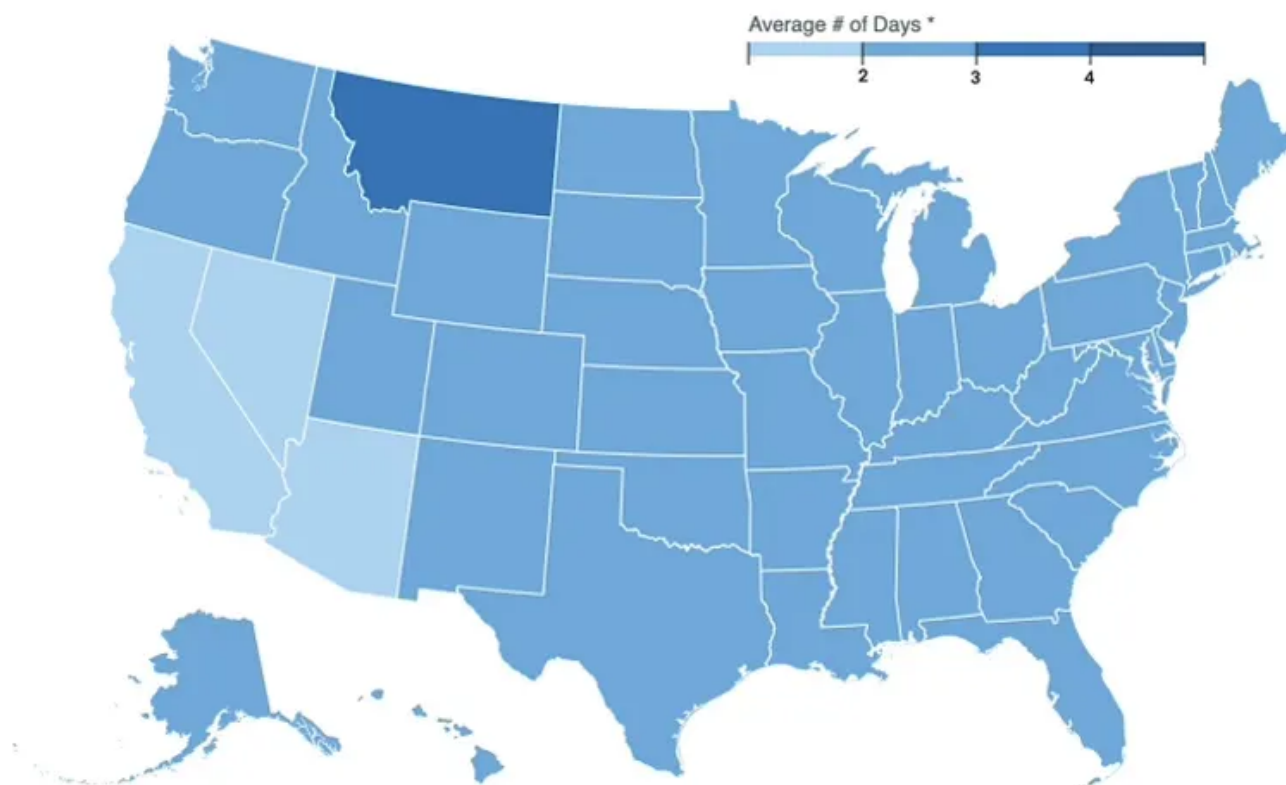
Certifications

- SOC 2 Type II
- SOC 1 Type II
- HIPAA, PCI DSS

Speed & Reach

Delivery to 92% of U.S. addresses within just 3 days

(Source: Internal tracking & logistics data)



DFS leverages advanced mail processing and national distribution infrastructure to ensure rapid delivery timelines without compromising accuracy. Your communications reach stakeholders quickly and reliably.

Implementation Time

- **Average Implementation Time:** Just 3 weeks



Services at a Glance

DFS provides a full suite of services backed by an intuitive, secure customer portal:

- Full-color variable printing
- Certified Mail
- Intelligent Inserting
- ADA Compliant Mailings (Braille / Audio)
- UPS/FedEx Automated Documents
- Online Bill Pay
- Online Document Presentment
- Desktop Publishing & Data Processing
- NCOA / Householding
- Mailroom & Return Mail Services
- Dedicated Account Managers

Annual Volume Highlights

Category	Volume (Annually)
Certified Mailings	1.5 million
FedEx & UPS Document Packages	3.6 million
Payments Processed	670,000
Mailroom Interactions	360,000
ADA Compliant Mailings	124,000
Digital Communications	1.3 million
Pages Processed	1.1 billion
Mail Pieces	216 million
Hosted Documents	5.2 billion

Scalable, High-Performance Infrastructure

Whether you send 10,000 or 10 million communications monthly, DFS delivers consistent performance, data security, and compliance — with real-time tracking, analytics, and support built in.

7.4.2. Meet the DFS Team

At the core of our operation is a dedicated team of professionals working together across specialized departments to ensure every project is executed with precision, quality, and care. This section introduces the key members of each department, highlighting their roles and contributions to our end-to-end process. By understanding who does what, you'll gain insight into the collaborative effort that powers our success and ensures your mail reaches its destination seamlessly.

Account Services - Available via AccountServices@dfsmail.com

- Renee Roberts
- Mike Feeley
- Megan Gadreault
- Deanna Dockter, Director of Administration
- DJ Chavez, Operations Manager
- Lyle Blue, National Sales Director

Billing - Available via Billing@dfsmail.com

- Ger Lo
- Kris Peterson, CFO

7.5. Document & Mail Standards

In this section you will learn about DFS standards for print ready documents.



[Standard Address Positions](#)



[Standard Page Breaks](#)



[DFS Envelopes Suite](#)



[Barcode Position & Logic Explained](#)

7.5.1. DFS Envelopes Suite

Introduction

DFS offers a collection of envelopes that are designed and printed to support our customer's needs. Our envelopes ensure streamline production and enhance the recipient's experience. Presentation, functionality, and consistency are some of the key factors for delivery.

Purpose

The purpose of this document is to educate team members, customers, and stakeholders on what envelope suites are, how they are used, and why they are important. It outlines the common types of envelopes, and how they contribute to streamlined mailing workflows, improved production quality, and cost-effective operations for DFS.

What Are Envelope Suites?

An envelope suite is a standardized set of envelope sizes, styles, and specifications used consistently across print and mail operations to ensure compatibility with printer, inserting equipment, and mailing requirements. This includes various envelope such as #10 envelopes, return envelopes, and flat envelopes.

Using an envelope suite helps:

- Maintain uniformity and brand consistency across mailings
- Streamline production and inserting processes
- Ensure postal compliance and optimize postage rate
- Reduce errors and production delays by working with pre-approved formats.

DFS Envelope Suite

Each envelope type is tailored to ensure the recipient's address is perfectly positioned in the window for accurate delivery. In the examples below, you'll see how proper alignment of the address within each type of file helps avoid delivery issues, misreads, or returns-ensuring your mail reaches its destination smoothly.

DF E-103 (DFS Standard #10 Envelope)



DF E-105 (Single Pistol Window 6x9)



DF E-912 (Oversized Windowed Envelope)

PRESORTED
FIRST-CLASS MAIL
U.S. POSTAGE
PAID
DFS

Document Fulfillment Services
2930 Ramona Avenue, Suite 100
Sacramento, CA 95826

1: 999999, 04, 6
Document Fulfillment Services
Attn: Admin
2930 Ramona Avenue, Suite 100
Sacramento, CA 95826

▼ **Revision History**

Revision Date	Updater Name	Description
May 1, 2025	Angelica Gonzalez	Initial draft

7.5.2. Document Folding

Introduction

When preparing mail for insertion into envelopes, the folding process plays a key role in ensuring accuracy, and presentation. Understanding how documents are folded, ordered, and inserted helps our customers visualize the journey from printed page to finished mail piece.

This guide provides an overview of:

- **Folding Types**
- **Nesting Methods**
- **Subsetting Details**
- **Page Order & Insert Sequence**
- **Flat Envelope Usage**

Our goal is to give you a clear understanding of these processes so you can make informed decisions about format, design, and the most cost-effective way to send your mail.

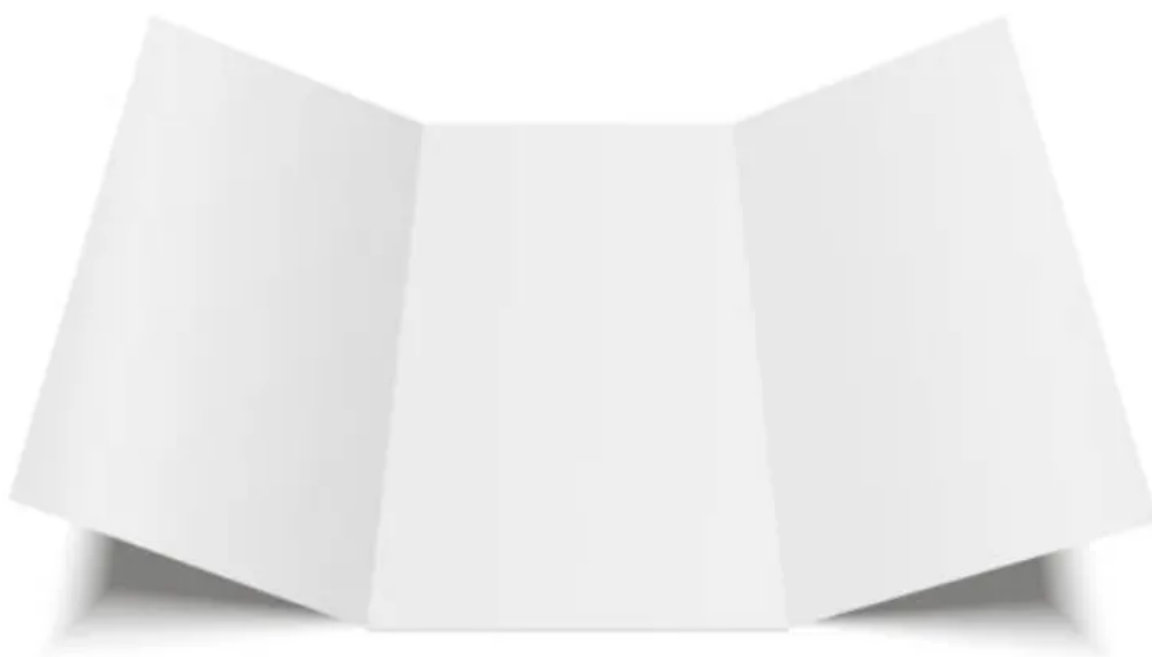
✓ Folding Types

The standard folds applied to pages to fit them into envelopes (e.g., C-fold, half fold, Z-fold).

#10 Outbound Envelope

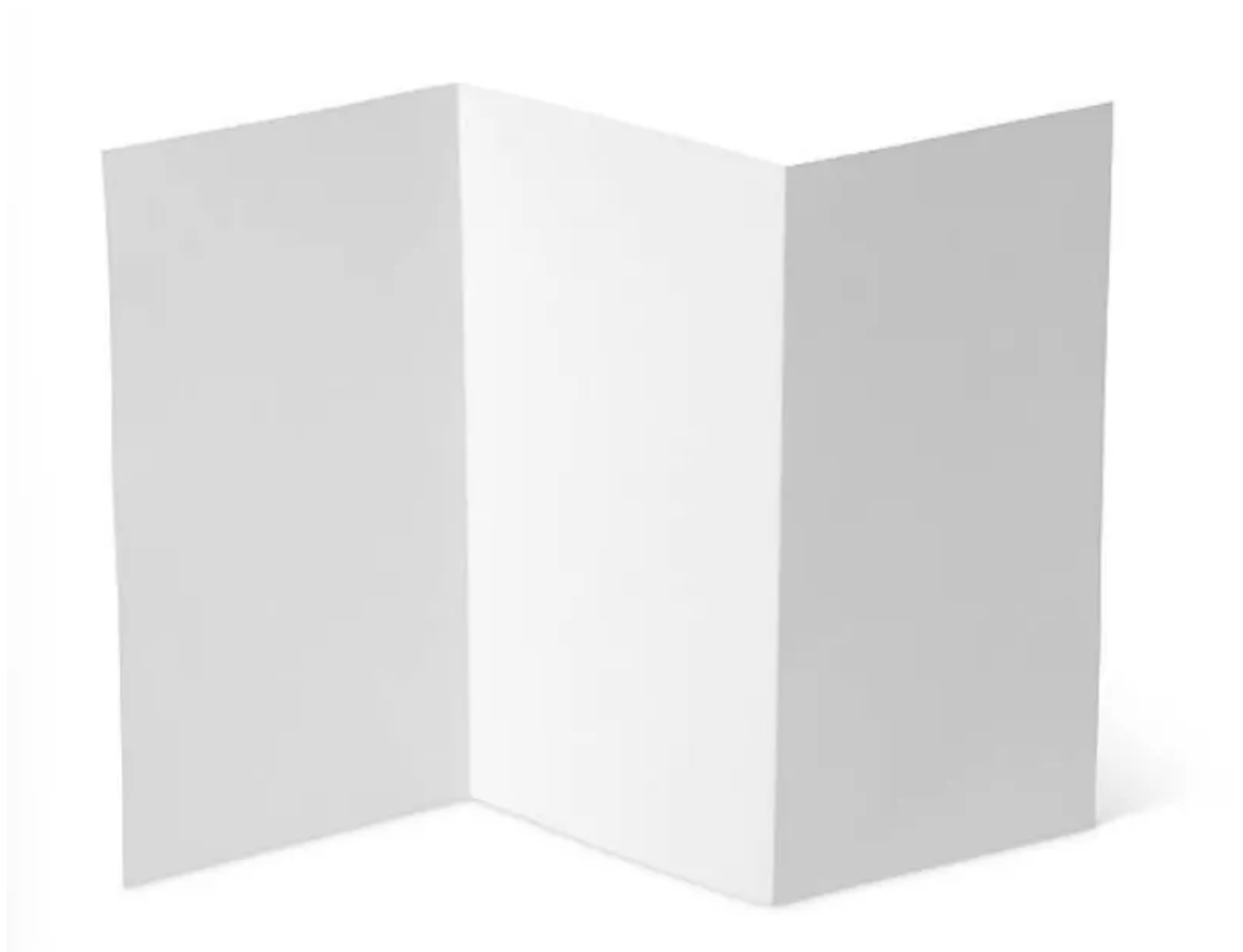
Documents are folded in one of two ways:

- **C-FOLD**



C-Fold

- **Z-FOLD**

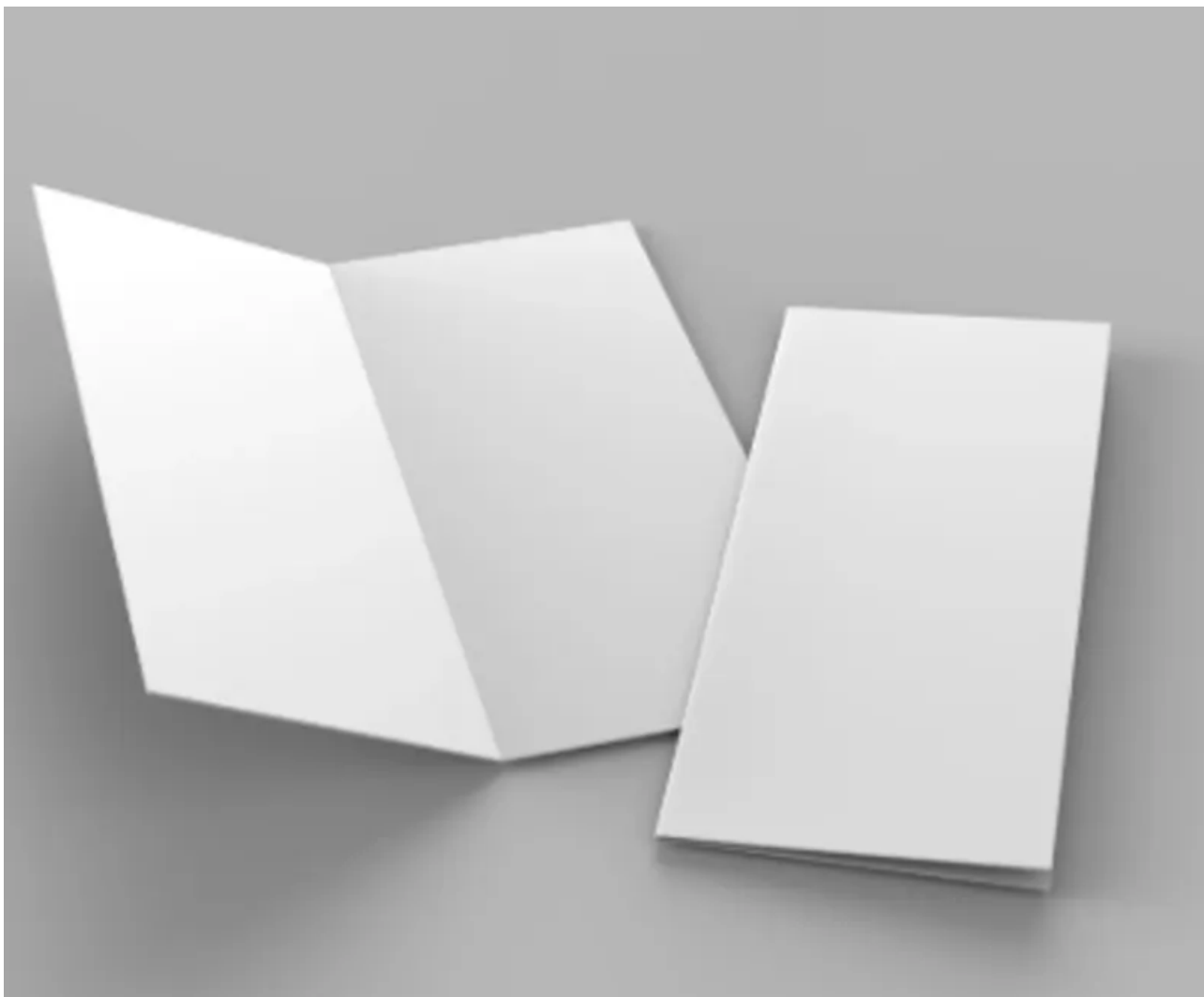


Z-Fold

#6x9 Outbound Envelope

Documents are folded as follows:

- **HALF FOLD**

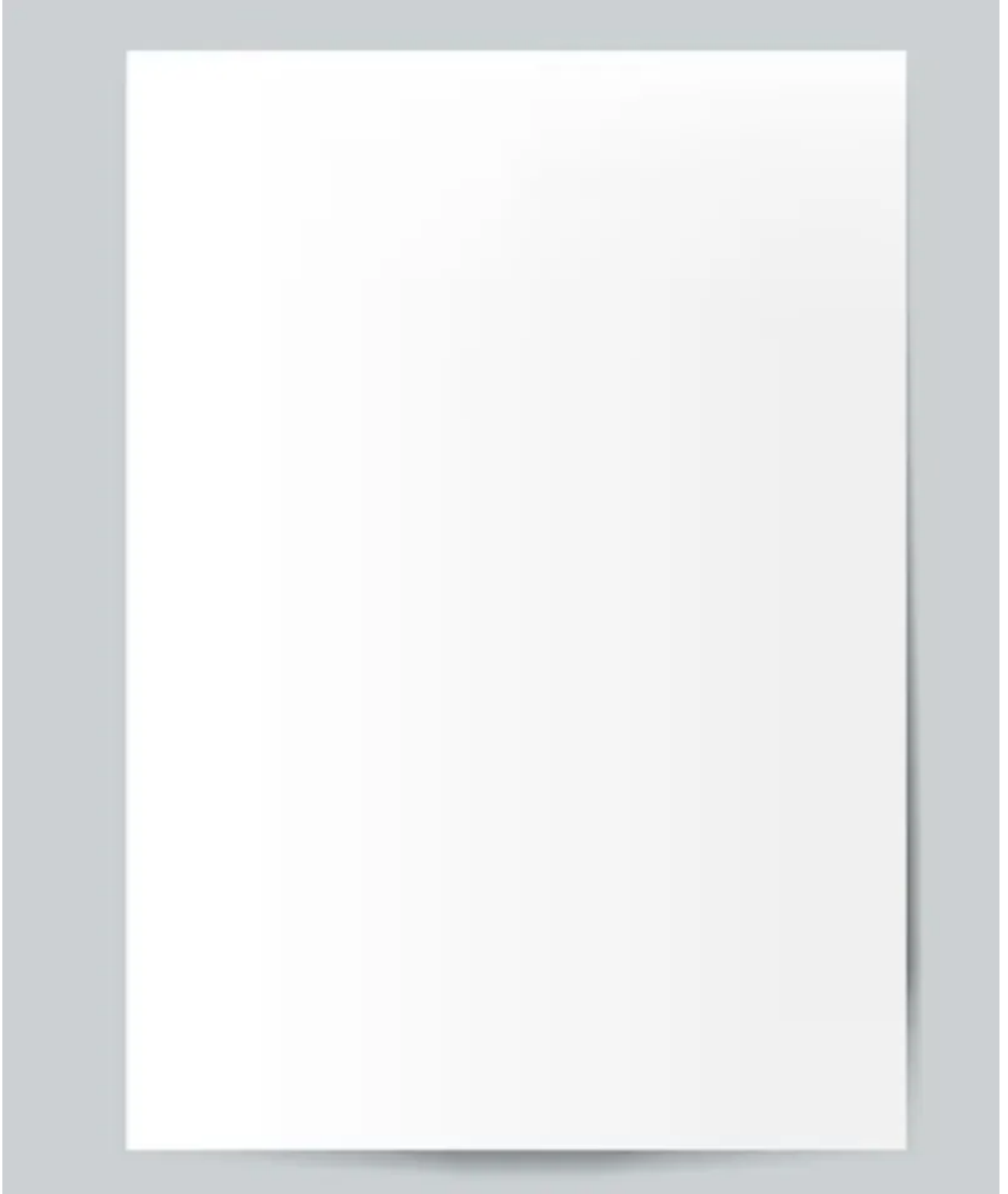


Half Fold

Flat Envelopes (e.g., 9x12)

Documents are not folded, used for larger mailings:

- NO FOLD



✓ Nesting & Subsetting Methods

Nesting of documents refers to how multiple pages are grouped, folded together, combined with additional inserts.

- **For Letters (C-Fold, Z-Fold)**
 - This typically is up to 4 pages nested (grouped together and then folded).
 - For mail pieces with more than 4 pages, nesting occurs in subsets to optimize machine handling and insertion.
- **For 6x9 (Half Fold)**
 - This typically is up to 6 pages nested (grouped together and then folded).
 - For mail pieces with more than 6 pages, nesting occurs in subsets to optimize machine handling and insertion.
- **For Flats (No Fold)**
 - This typically is up to 20 pages are nested (grouped together and then folded).
 - For mail pieces with more than 20 pages, nesting occurs in subsets to optimize machine handling and insertion.

Subsetting helps manage large documents efficiently:

- Each subset is folded and inserted into the envelope.
- Subsetting is determined based on current production quality guidelines.
- **Example: a 9-page Letter document might be broken into sets of 4, 4, and 1 pages.**

✓ Page Order & Insert Sequence

Documents are inserted in the exact order displayed on the pagination page.

- This method is used to ensure page sequence is preserved from start to finish.
 - Page 1 of 4, Page 2 of 4, Page 3 of 4, and Page 4 of 4.
- Inserts are then added to the track of the inserting machine as the documents pass through the equipment.
- With the Outbound Envelope being the last component to be grabbed for insertion.

✓ Flat Envelope Usage

These are envelopes used on documents that require no folding. Typically those mail pieces that are larger packets.

7.5.3. Standard Address Positions

Introduction

In this industry, accuracy and compliance with USPS regulations are critical to ensuring timely delivery and cost-effective processing. Maintaining uniform address placements is critical for proper alignment and/or folding during the insertion process and for seamless USPS processing. Inconsistent positioning can lead to misreads, rejections, or mailing delays.

Purpose

The purpose of this document is to define and standardize address positions within all mailing projects to ensure consistency, and accuracy throughout production. One important quality control measure used in DFS production is the [Tap Test](#). This document outlines the purpose, and importance of this test as it relates to address visibility and mail piece integrity. By incorporating a tap test during the testing phase, all DFS teams can proactively identify and resolve potential address position issues. This preventive measure supports operational efficiency, minimizes rework, and ensures every piece is accurately inserted and USPS ready from the start.

Examples of Address Positions

In the examples below, you'll see DFS's suite of envelopes, each featuring perfectly formatted address placements tailored for different mail types - **Letters (Letter-Fold or Z-Fold)**, **Letter6x9 (Half-Fold)**, and **Flats (No-Fold)**.

These layouts ensure professional presentation and optimal mailing processing time.

Letter in a #10 Envelope

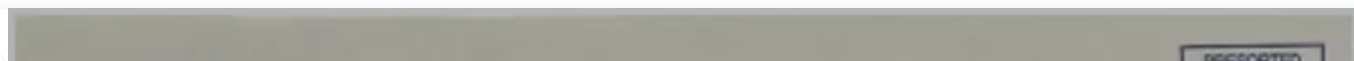


Letter6x9 in a 6x9 Envelope



Flat in a 9x12 Envelope

Flat in a 9x12 Envelope



Address Position Requirements

To qualify for automation discounts and efficient delivery, the USPS requires addresses to:

- **Be clearly visible** through the envelope window or printed directly on the envelope.
- **Be parallel to the longest edge of the mail piece**
- **Be formatted according to the USPS standards**
 - Including ZIP+4, and consistent font
- **Use a 10 to 12-point font size**
- **Include a delivery address line, and city/state/ZIP**
- **Fall within the OCR Read Area:**
 - From the bottom edge: 5/8" minimum
 - From the left and right edges: 1/2" minimum
 - From the top edge: 2-3/4" maximum

Consequences of Poor Address Positioning

Failure to meet address position standards can result in:

- Mail piece **rejection from automation**, can require manual processing and can incur extra costs.
- **Delivery delays** due to unreadable addresses or misrouted mail.
- **Returned mail** if addresses fall outside the readable window.
- Wasted postage and **inventory costs** due to reprints or remailing.
- Inserting Department can have **folding issues** setting up your job if the addresses are not consistent causing all of the above issues.

Helpful Tips for Creating a Mailing

- Use window envelope **template** examples to design address areas and **test positioning**.
- Conduct a **Tap Test** during testing to ensure the address remains within the window.
- Use **address block** bounding boxes in your layout file to control spacing.
- Include a 1/8" to 1/4" **safety margin** around the address area inside the window.
- **Test** with actual **stock and envelopes** before final production.
- Standardize **address blocks** with **style sheets or template**.



Size Requirements for Automation Mail

To qualify for USPS automation rates and to ensure proper processing:

Mail Piece Type	Minimum Size	Maximum Size	Maximum Weight
Postcards	3.5" x 5"	4.25" x 6"	1oz
Letters	3.5 x 5"	6.25" x 11.5"	3.5oz
Flats	6.125" x 11.5"	12" x 15"	13oz

- Pieces must be uniformly thick and flexible for sorting machines designed to go at high speeds.

7.5.4. Standard Packages & Page Breaks

Introduction

Precise weight management is crucial for ensuring mail pieces meet postal regulations, qualify for the correct rate categories, and are processed efficiently. This document provides an overview of page break points based on commonly used weights of paper stock, ink coverage, envelope type, inserts, and other mailing components.

Purpose

The purpose of this document is to support accurate job setup, cost estimation, and mailing efficiencies by offering general guidelines for component-based weight calculations. While the figures presented are based on industry standards, actual results may vary due to fluctuations in materials. Therefore, we require a physical test in the production environment for final validation.

▼ Scope

Roles and Responsibilities

Name	Responsibilities
Account Services	• Receive and review system-generated tickets for each work order that errors out or has been placed on-hold by Production. • Collaborate with relevant departments to identify the root cause of the issue and escalate when necessary. • Report recurring issues or workflow gaps to management for continuous improvement efforts. • Determine whether customer input is required for resolution.

What are Page Breaks?

Page breaks matter as every sheet of paper adds weight to a mail piece. Postage rates (especially for USPS First-Class Mail) are based on weight categories - typically in 1-ounce increments (e.g., 1oz, 2oz, 3oz, etc.).

If a document or letter has too many pages, the final mail piece could shift into a higher postage category, costing more money and adding difficulty with the reconciliation of final reporting.

Who is this guide for?

This guide can be an essential resource for first time customers. It can help customers understand the formatting of their documents for seamless production, ultimately improving efficiency, and reducing errors across all mail pieces.

Consistent page break standards help ensure:

- Accurate page counts
- Accurate postage estimates and final costs
- Easier handling for mailing equipment



Standard Package Names & Page Breaks

20# 8.5x11 Plain Paper

Package	Page Range
LETTER	1-6
LETTERHW	7-9
LETTER6X9	10-18
FLAT	19-74
OVERSIZED	75+

***Additional Inserts may alter the final page breaks at a customer/job level

24# 8.5x11 Plain Paper

Example: <https://dfsmail.freshdesk.com/a/tickets/207607>

Package	Page Range
LETTER	1-6
LETTERHW	7-9
LETTER6X9	10-15
FLAT	16-62
OVERSIZED	63+

***Additional Inserts may alter the final page breaks at a customer/job level

Additional Packages that may be used

Foreign Packages

Package Name
LETTER-FOREIGN
LETTER6X9-FOREIGN
FLAT-FOREIGN
OVERSIZE-FOREIGN

Certified

- Certified packages can vary depending on the package setup.
 - **DCA = LETTER, LETTER-CERT, LETTER-FOREIGN**
 - LETTER exists for pieces that fail to qualify as certified.
 - FOREIGN exists for pieces that are noted as foreign.
- **Parathon** isn't fully automated and uses a mix of packages that do not include Certified.
 - Account Services prefers to include CERTIFIED in package names, when possible, like the DCA scenario above.



Feedback & Support

For questions, corrections, process updates, or additional guidance related to this SOP, please contact the Technical Writing Department using the button below.

[Submit a Support Ticket](#)

Revision History

Revision Date	Updater Name	Description
June 30, 2025	Angelica Gonzalez	Initial draft
December 5, 2025	Angelica Gonzalez	Edits to links
February 9, 2026	Angelica Gonzalez	Updates to glossary words
February 19, 2026	Angelica Gonzalez	Updates to document

7.5.5. Barcode Position & Logic Explained

Introduction

This document provides an example of a properly formatted mailing document layout, highlighting the key elements that must be present to meet standards in DFS printing, and inserting. This serves as a visual guide for quality assurance teams, production staff to verify that all barcode layout components are correctly positioned and functional across each stage of the mailing process.

Purpose

The purpose of this document is to demonstrate how a well-prepared keyline and barcode should look and function. By following this example, DFS can prevent production errors, and ensure smooth and compliant workflow from printing to mail delivery.

It emphasizes critical elements such as:

- **Barcode readability & positioning**
 - **Insert logic**
-

Printing Department Scope

The printing team is responsible for ensuring the visual and structural quality of the printed document. Key layout elements include:

- **Barcode Placement:** 2D barcodes must be fully visible, unobstructed, and positioned for machine readability.
- **Print Mode & Pagination:** Ensure the correct duplex/simplex print mode and verify pagination sequence.

Inserting Department Scope

The inserting team ensures the correct assembly and integrity of the final mail package. The layout must support:

- **2D Barcode Functionality:** Barcode must be scannable and follow correct logic to trigger the appropriate insert components.
 - **Insert Configuration:** Inserts must be loaded correctly in hoppers with matching binary codes per job specifications.
-

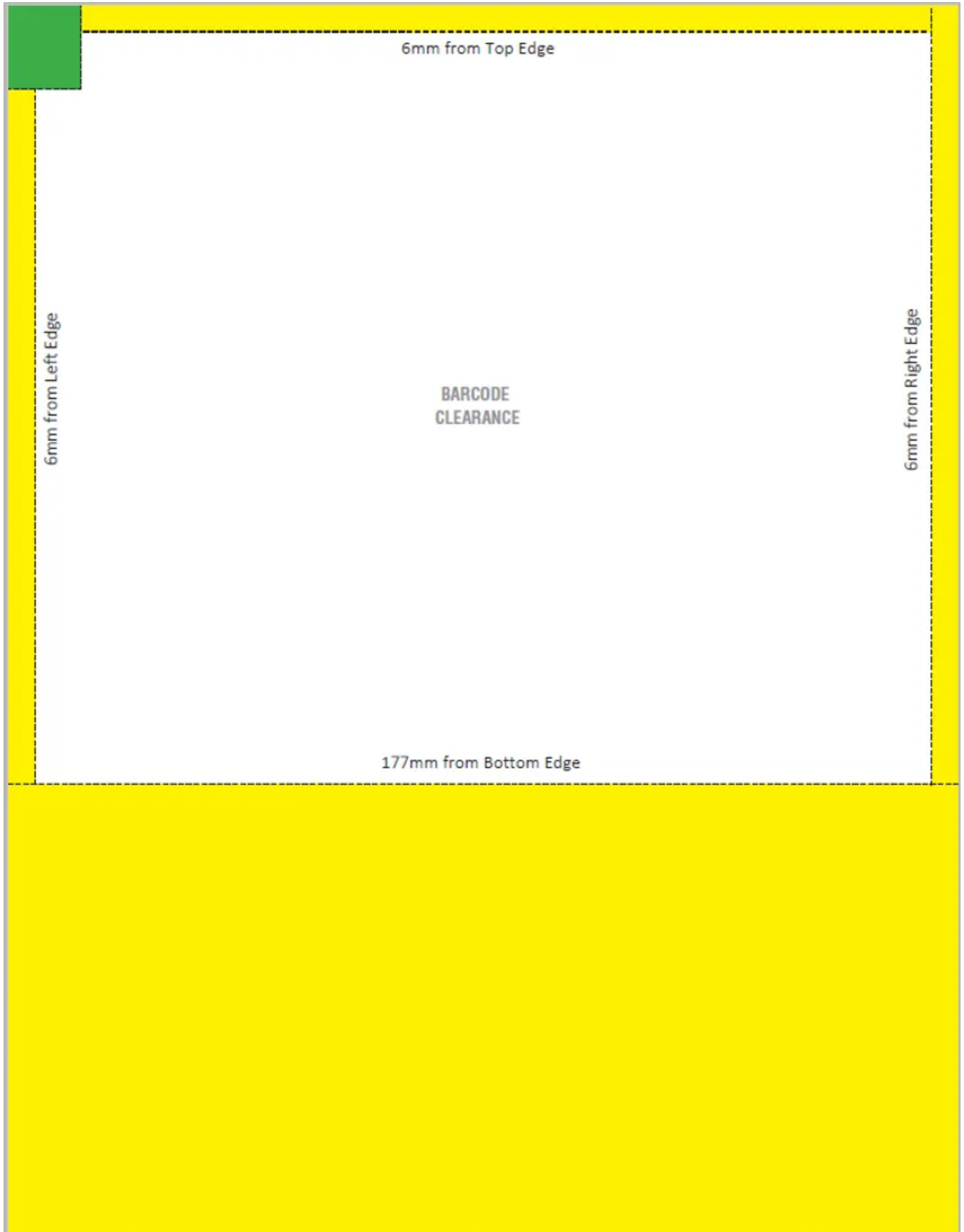
Barcode Layout Guide

This outlines the barcode clearance requirements for placing a barcode on a mail piece (sheet of paper). To ensure readability and compliance, the barcode must be surrounded by a clear white space or [Barcode Quiet Zone](#).



For optimal placement:

- **Letter-sized pieces:** Position the barcode adjacent to the recipient address.
- **Flat (non-folded) pieces:** Position the barcode in the **top right** or **top middle** area of the piece.



Example of a DFS Generated Keyline

Keyline - This is a DFS-generated sequence of numbers printed on each mail piece to uniquely identify and track individual recipients within a job. Typically located next to the recipient's name and address, the keyline appears in sequential order and serves as a reference point for tagging, sorting, and quality control. This first digit in the keyline represents the initial data point, followed by additional coded information relevant to the mailing process.



1.999999.S1.00.0

Recipient Name

Street Number & Name

City, State Zip Code

Work Order ID - This is a unique identifier assigned to a specific job. This serves as a reference number that links all job-related details to an electronic work order that provides clear instructions on how a job should be handled from end-to-end workflow.

Print Mode - This digit in a Keyline sequence, shows how a job is setup to be printed -S (**Simplex**) or D (**Duplex**) - it determines the requirement of how that mail piece should be printed; One-Sided or Two-Sided.

Insert Code - On jobs that require additional insert materials, such as flyers, brochures, or return envelopes, an insert code is added to the keyline data line to aid production teams on configuring equipment to correctly call, pull and insert into the required mail piece(s).

Pagination - Refers to the numbering and sequencing of pages within a document or mailing set. This pagination process ensures that all pages belonging to a single recipient are printed, grouped, and inserted in the correct order.

Binary Code in a 2Barcode - Every document must include a barcode that is essential to the inserting process for each job. This barcode contains pagination and insert component data, which instructs the inserting equipment on which inserts to pull and how to assemble the pages. It ensures that all pages intended for a single recipient are accurately grouped, ordered, and mailed correctly.



COMPANY NAME

Tel. (999) 999-9999 Fax (999) 999-9999
www.companywebsite.com

67890 Abcdefg
City, State Zip

Print Mode

Keyline Number

Work Order ID

Insert Code

Pagination

2D Barcode

1.999999.S1.00.0

Recipient Name
Street
Number & Name City,
State Zip Code

STATEMENT

Pg. 1

ACCOUNT #	STATEMENT DATE
09-999999	1/30/2025

STATEMENT AMOUNT DUE
1,234.00

REMIT TO: Return Address
12345 Abcdefg
City, STATE Zip



Revision History

Revision Date	Updater Name	Description
May 5, 2025	Angelica Gonzalez	Initial draft
May 22, 2025	Angelica Gonzalez	Updates

7.5.6. USPS Address Quality

USPS Address Quality: CASS and NCOA

Accurate addresses are essential for timely delivery and USPS compliance. USPS provides two options to ensure address quality: **CASS™ Certification** and **NCOA® (National Change of Address)** processing. These services can be used separately, or in tandem, to maximize deliverability.

What is CASS?

CASS™ (Coding Accuracy Support System) is a USPS certification process that standardizes and validates addresses.

- **Included service:** All addresses are run through CASS if NCOA is not selected.
- **Purpose:** Ensures addresses are complete, correctly formatted, and valid for USPS delivery.
- **Checks performed:**
 - Validates city, state, ZIP, and street combinations.
 - Assigns proper ZIP+4™ codes.
 - Runs **Delivery Point Validation (DPV®)** to confirm the address exists for USPS delivery.

Benefits of CASS:

- Improves address consistency and accuracy.
- Reduces undeliverable mail.
- Ensures addresses meet USPS formatting standards.

What is NCOA?

NCOA® (National Change of Address) is a USPS-licensed database containing 48 months of permanent change-of-address (COA) records.

- **Requirements:**
 - Requires at least **100 unique addresses** in a mailing to qualify.
 - If the mailing does not meet this minimum, **CASS will be run by default.**
- **Purpose:** Matches customer addresses against USPS COA records and updates them if a recipient has filed a move order.

Benefits of NCOA:

- Provides the most up-to-date USPS move data.
- Helps meet USPS Move Update requirements.
- Reduces mail delays and undeliverable pieces.
- Often used in tandem with CASS for maximum accuracy.

DPV: Delivery Point Validation

DPV® is a USPS process that confirms an address exists as a deliverable point (house, apartment, PO Box, etc.).

- **Pass:** The address is valid and USPS can deliver mail to it.



- **Fail:** The address is incomplete, inaccurate, or not recognized as deliverable.

Impact:

Failing DPV means the mailpiece may be returned or undeliverable.

Certified Mail Note: If you have a Certified mailing, USPS requires addresses to pass DPV in order for labels to be produced.

- **Passing DPV Codes:** Y (validated), S (valid, missing secondary).
- **Failing DPV Codes:** N (not validated), D (secondary invalid).

How They Work Together

- **NCOA + CASS:**
 - NCOA first updates addresses with USPS change-of-address data.
 - CASS then standardizes and validates the updated address, applying DPV.
- **CASS Only:**
 - If NCOA is not selected or the job does not meet the 100-address minimum, addresses are run through CASS.

Return Codes Quick Reference

When addresses are processed through CASS or NCOA, return codes indicate whether the address passed validation or why it failed. Below is a simplified guide:

Code	Meaning	Impact
DPV = Y	Delivery Point Validated	Address is deliverable. (Certified labels can be produced.)
DPV = S	Valid but Secondary Missing	Deliverable, though may require unit/apartment correction. (Certified labels can be produced.)
DPV = N	Not Validated	Address not recognized as deliverable; must be corrected.
DPV = D	Secondary Present but Invalid	Address has a unit number, but USPS does not recognize it as valid.
NCOA: Moved/Forwarding	Address updated with a USPS move record	Address replaced with forwarding address, if available.
NCOA: Moved, No Forward	Recipient filed a move, but no forwarding address on record	Mail will be undeliverable.
NCOA: No Match	No COA record found	Original address remains; CASS will still validate for accuracy.
CASS: Invalid City/ZIP	City, state, or ZIP do not match USPS data	Must be corrected before mailing.
CASS: Nonexistent Address	Street/number combination is not recognized	Address is undeliverable.



CASS_NCOA Return Codes

 CASS_NCOA Return Codes.pdf	
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 For the full technical list of return codes, see the [USPS PostalPro DPV Guide](#).

7.5.7. Check printing controls

DFS can support check printing as a controlled, audited manufacturing process where the customer remains the custodian of record and final authority over issuance, approval, and bank instructions. We align our production workflow to the customer's treasury controls, bank requirements, and internal policies (including any required pre-approvals, authorized signers, and sequence rules), then execute to those controls with documented chain of custody, reconciliation, and exception handling.

Where check work differs from standard transactional print is that we treat three items as "high risk assets" and control them accordingly: (1) blank check stock, (2) check sequence and MICR content, and (3) signature assets (whether wet-signature, digitized signature, or signature block logic). Below is how we safeguard each area, and how we typically recommend customers reduce fraud exposure (including Positive Pay).

For guidance on implementations, please see our list of [Customer questions and recommendations](#)

How we secure blank check stock (blank until printed)

Meet the requirement

- Secure storage (restricted access): Blank check stock is stored in controlled-access areas with role-based access, physical access logging, and camera coverage appropriate for secure production environments.
- Inventory control and reconciliation: Stock is received, counted, logged, and tracked by lot. Job-level issues are recorded and reconciled to expected usage, including spoilage, reprints, and voids.
- Controlled movement: Stock movement from storage to production is performed under documented process controls so chain-of-custody is maintained from receipt through destruction of waste.

Exceed the requirement (when the customer desires it)

- Dual-control handling for high-risk runs: Two-person verification for stock pulls, returns, and end-of-run reconciliations.
- Segregated "caged" storage and tighter pick windows: Stock only staged immediately prior to production to reduce exposure time.
- Customer-specific stock isolation: Dedicated locations, unique labeling, and job gating so one customer's check stock never commingles operationally with another's.

Check sequence control, MICR, and security features

Meet the requirement

- Sequence governance: We print checks under explicit sequence rules provided by the customer (start, end, gaps, void rules). We reconcile "printed" vs "expected" and produce exception reporting for any breaks in sequence (for example, spoilage or reprints).
- MICR line integrity: MICR data (routing, account, check number) is produced from the customer-approved source file and controlled through our job setup, proofing, and run-time validation steps.
- Security features: We support common check security features (for example microprint, warning bands, pantograph backgrounds, toner adhesion features, and other deterrents) based on the customer's check design standards and bank acceptability.

Exceed the requirement (when the customer desires it)

- Enhanced file-to-print validation: Automated checks for duplicate check numbers, out-of-range sequences, payee field presence, and threshold rules (for example, additional review for checks over a customer-set amount).
- Tighter exception workflows: Predefined decision trees for voids, reprints, and stop/reissue scenarios so the customer receives consistent reporting back to treasury and AP.

Signature security (the most sensitive element)

Meet the requirement

- Signature assets are treated as restricted data: Signature images or signature authorization rules are stored and handled under least-privilege access, with strong authentication, audit logging, and encrypted storage.
- Separation of duties: Access to signature assets is limited to a minimal set of authorized personnel and systems, and separated from general production access wherever practical.
- Controlled use: Signatures are applied only for the specific job and records authorized by the customer's rules (for example, signer matrix, dollar thresholds, or "no signature" rules for certain payment types).

Exceed the requirement (when the customer desires it)

- Customer-managed signatures: We can structure the workflow so the customer retains primary control of signature release logic (for example, job-based authorization, threshold-based signer logic, or release approvals before print).
- Additional hardening and audit artifacts: Expanded logging and review checkpoints for signature usage, including periodic access reviews aligned to the customer's governance cadence.

Positive Pay recommendation (fraud reduction)

DFS strongly recommends Positive Pay as the standard control for live check issuance. In a typical workflow, the check is not considered "live" until the customer (or their treasury team) transmits the issued-check file to their bank (check number, amount, and payee). The bank then matches presented items against the Positive Pay register and only honors items that match the customer's authorized list. This materially reduces fraud risk even if a physical check is altered or counterfeited, because the bank decisioning is driven by the customer's issued-check data.

Security and audit posture

DFS maintains a control environment aligned to enterprise expectations for sensitive data handling, including SOC 2 Type II and NIST CSF certification. We can map the check-print workflow controls above into the customer's required control framework (access control, logging, change management, incident response, and vendor governance) so the customer can document how production aligns to their treasury and risk requirements.

Customer questions and recommendations

7.5.7.1. Customer questions and recommendations

Below are implementation considerations that your Account Services Specialist will guide you through when discussing check processing & printing.

1) Governance and roles (custodian of record)

Questions

- Who is the custodian of record for check issuance (treasury, AP, or another group), and who is the authorized approver for exceptions (voids, reprints, stop/reissue)?
- Who owns the bank relationship and Positive Pay enrollment (including contacts for file format, transmission method, and exception handling)?
- Are there written policies we must follow (check issuance policy, signer policy, fraud controls, retention policy)?

Recommendations

- Confirm a single "check issuance owner" and a named backup approver to avoid delays during exceptions.
- Document the end-to-end issuance workflow (data file creation, approvals, production, Positive Pay transmission, bank exception review).

2) Bank requirements and Positive Pay configuration

Questions

- Is Positive Pay required today, and is it check-only or payee-name Positive Pay?
- What file format does the bank require (CSV, fixed-width, BAI2 add-on, bank-specific template)?
- What is the required cutover timing (when must the issued-check file be at the bank for same-day coverage)?
- How are exceptions handled at the bank (customer portal review, daily exception window, delegated approvers)?

Recommendations

- Use Payee Positive Pay when the bank supports it (it materially reduces alteration risk).
- Establish a consistent daily transmission schedule tied to production completion (so checks are never "live" without Positive Pay coverage).
- Define an exception SLA (who reviews bank exceptions, how quickly, and what happens after cutoff).

3) Check stock (blank stock control and ownership)

Questions

- Will the customer provide check stock, or should DFS source and manage it under the customer's specifications?
- Are there stock constraints (brand, paper weight, watermark, toner-lock, preprinted security background, color requirements)?
- Should stock be dedicated per account/program (separate inventories for different bank accounts or payment types)?

Recommendations

- Treat blank stock as controlled inventory with lot tracking and reconciliation to printed output.
- Keep stock dedicated by customer and, if needed, by account/program to reduce cross-use risk and simplify audits.

- Define destruction procedures for obsolete stock and spoilage (including documentation requirements).

4) Check layout, security features, and bank acceptance

Questions

- Does the customer already have a bank-approved check template, including MICR placement and line formatting?
- Which security features are required vs preferred (microprint, pantograph, warning band, toner adhesion, UV features, etc.)?
- Are there branding or messaging requirements on the check (remittance messaging, payee instructions, customer service lines)?

Recommendations

- Use a bank-approved template and treat layout changes as controlled changes (with customer approval before production).
- Align security features to practical fraud deterrence and bank acceptance (avoid features that create scanning/read issues).
- Maintain a controlled version history for check templates and MICR formatting.

5) MICR line content and sequence rules

Questions

- Confirm routing and account numbers, check number length, and any special MICR formatting requirements.
- What are the required sequence rules (start/end ranges, gap handling, void numbering, reprint numbering)?
- Are there multiple bank accounts/programs that require separate sequences?

Recommendations

- Define a single source of truth for check number assignment (customer system or DFS workflow) and lock it down.
- Produce a post-run reconciliation report (expected vs printed, voids, reprints, spoilage) to support audit and Positive Pay.
- Separate sequences by account/program and prevent overlap by design.

6) Data file content, approvals, and release to print

Questions

- What is the input file format and required fields (payee name, address, amount, invoice/remittance detail, check number if preassigned)?
- What approvals are required before printing (treasury release, AP approval, dollar-threshold review)?
- Are there controls for high-dollar payments (additional approval, dual-control release, separate run)?

Recommendations

- Implement a "release to print" step owned by the customer (primary and backup approver).
- Add validation rules before production (required fields present, amount format, duplicate detection, threshold handling).
- For high-dollar checks, consider an additional approval gate and/or separate controlled production batch.

7) Signature handling (policy, assets, and thresholds)

Questions

- What signature method is required (wet signature, digitized signature image, signature block without image, or authorized signer text)?
- What are the signer threshold rules (for example: signer A under \$X, dual signatures above \$X)?
- Who is authorized to approve signature asset changes (new signer, signature replacement, emergency revocation)?

Recommendations

- Treat signature assets as restricted data with least-privilege access and audit logging.
- Use threshold-based rules when required and confirm how “dual signature” is represented operationally.
- Establish a formal change process for signature updates (approval, effective date/time, audit record).

8) Exception handling (voids, reprints, stops, and returns)

Questions

- What constitutes an approved reprint (lost mail, damage, customer request) and who authorizes it?
- Should reprints reuse the original check number or issue a new check number (and how is the original voided)?
- How do you want stop payments and reissues handled operationally and in reporting?

Recommendations

- Define a standard policy for reprints vs stop/reissue (and align it with bank Positive Pay controls).
- Ensure every exception results in updated reporting back to the customer for Positive Pay (voids and reissues included).
- Maintain an exception log that ties directly to reconciliation reporting.

9) Mailing controls (because checks are negotiable instruments)

Questions

- What mailing class and service levels are required (First-Class, Certified, signature required, tracking requirements)?
- Are there address hygiene requirements (NCOA, CASS, return processing rules)?
- Should checks be inserted with remittance detail, stubs, or additional enclosures (and do any of those change by payee type)?

Recommendations

- Use mail tracking where appropriate for high-value payments and define escalation paths for “not delivered” scenarios.
- Align address hygiene and return mail processing with the customer’s reissue/stop policy.
- Keep insert logic deterministic and auditable (especially if different inserts go to different payee categories).

10) Reporting, audit artifacts, and retention

Questions

- What reports are required after each run (issued-check register, void/reprint report, sequence reconciliation, postage/mailing manifest)?
- How long must production artifacts be retained (files, reconciliation reports, job tickets, camera footage where applicable)?
- Are there customer audit requirements (internal audit, external audit, SOC mapping, on-site audits)?

Recommendations

- Provide standard run packages: issued-check register, Positive Pay file confirmation, and sequence reconciliation with exceptions.
- Align retention to the customer's compliance needs and bank dispute windows.
- Map controls to the customer's audit framework (and share evidence artifacts in a controlled manner).

11) Implementation and testing (before going live)

Questions

- Do you have a bank test plan for Positive Pay (test file submission, exception simulation, timing validation)?
- What is the cutover plan (first live run date, parallel run needs, rollback plan)?
- Who signs off on the final proof (layout, MICR, security features, file validation)?

Recommendations

- Run a formal end-to-end pilot: print proof, MICR verification, Positive Pay test submission, and exception simulation.
- Confirm operational SLAs (file delivery deadlines, print completion windows, Positive Pay transmission timing).
- Establish a controlled change process post-go-live (template changes, bank changes, signer changes, account changes).

8. Service Add-Ons

8.1. TrackNTrace

Introduction

Track N Trace is a mail tracking platform used to monitor mailings and individual mailpieces using USPS scan data.

Users can search for specific mailpieces to review available tracking activity, delivery estimates, and scan history, or use reporting tools such as the Scan Export to retrieve detailed scan data for one or more mailings. This information can be used to research mailpiece status, review mailing performance, and troubleshoot delivery or tracking questions.

Purpose

- Provide step-by-step instructions for tracking individual mailpieces in TrackNTrace.
- Explain how to access and generate the Scan Export Report.
- Help users locate mailpiece scan information and understand the information returned by TrackNTrace.

Who Should Use This Guide

- **Track N Trace Users:** Individuals with access to Track N Trace who need to locate individual mailpieces, review tracking and scan information, or generate Scan Export reports for their mailings.

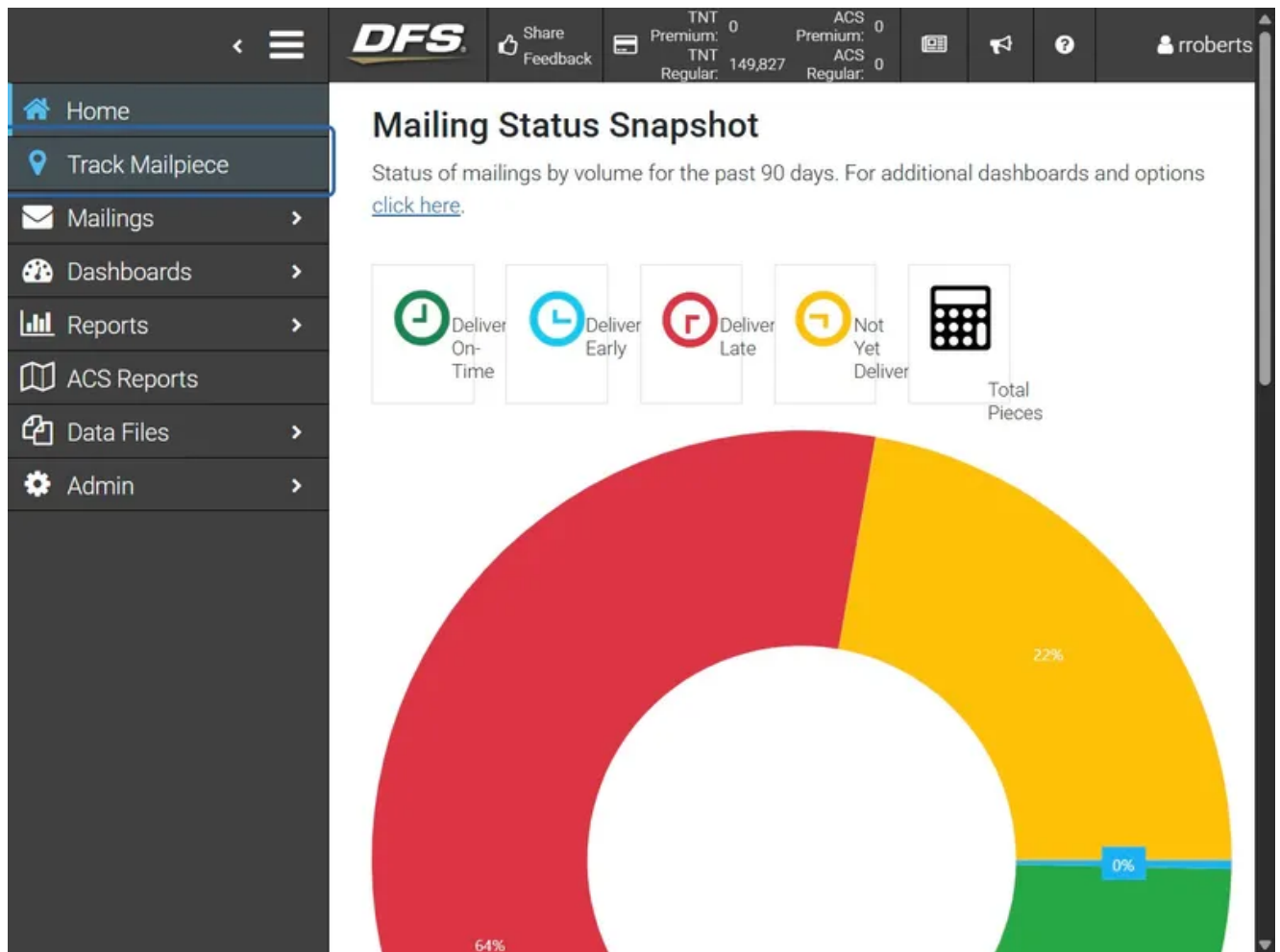
Tracking a Mailpiece

The **Track Mailpiece** screen allows users to locate individual mailpieces within a mailing and review available USPS tracking and scan information. This can be used to research the status of a mailpiece, determine when and where it was scanned, and review estimated delivery information.

Step-By-Step

- 1 **Go to Track and Trace - [Home Page](#)**

2 Click on Track Mailpiece



3 Select the Mail Group where appropriate

<

≡



Share

Feedback

TNT Premium: 0

TNT Regular: 149,827

ACS Premium: 0

ACS Regular: 0

roberts

Home

Track Mailpiece

Mailings

Dashboards

Reports

ACS Reports

Data Files

Admin

Track Mailpiece

Barcode

Destination or Origin

Mail Group

All Mail Groups

Mailing

All Mailings

More...

Search

Clear

Mailing Date

6/27/2026

to

All Mail Groups

4X0470

G4GEBF

HC6HUB

RPBZEP

UQSYWV

UZLZDM

Name

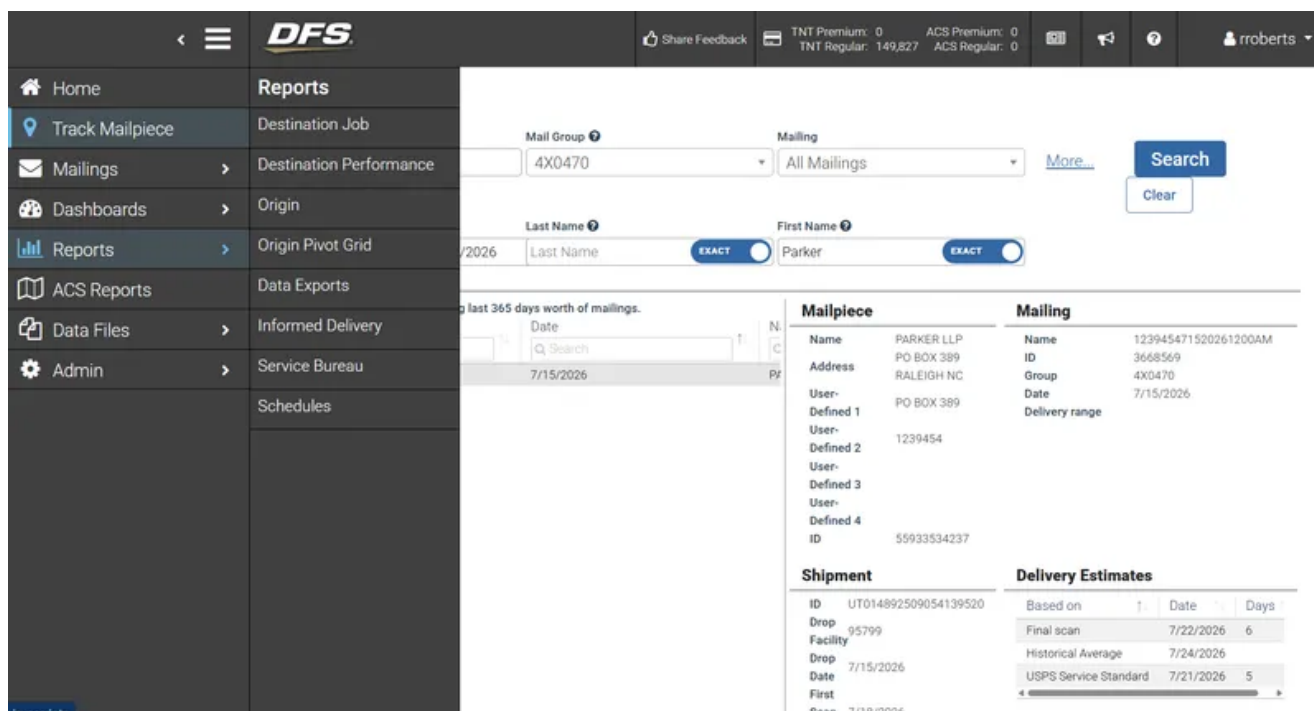
EXACT

120 / 268

121 / 268

122 / 268

7 Details about the selected mailpiece appear in the right pane



Mail Group		Mailing	
4X0470	All Mailings	More...	

Last Name		First Name	
Parker	EXACT	Parker	EXACT

Mailpiece		Mailing	
Name	PARKER LLP	Name	123945471520261200AM
Address	PO BOX 389 RALEIGH NC	ID	3668569
User-Defined 1	PO BOX 389	Group	4X0470
User-Defined 2	1239454	Date	7/15/2026
User-Defined 3		Delivery range	
User-Defined 4			
ID	55933534237		

Shipment		Delivery Estimates	
ID	UT014892509054139520	Based on	Final scan
Drop Facility	95799	Date	7/22/2026
Drop Date	7/15/2026	Days	6
First Scan	7/18/2026	Historical Average	7/24/2026
		USPS Service Standard	7/21/2026
		Days	5

Search Parameters

Navigate to **Track Mailpiece** from the left navigation menu. Use one or more of the available search fields to narrow the results, then select **Search**.

The standard search fields include:

- **Barcode:** Search using the Destination or Origin barcode associated with the mailpiece.
- **Mail Group:** Limit results to a specific Mail Group.
- **Mailing:** Limit results to a specific mailing.
- **Mailing Date:** Enter a date range to limit the mailings included in the search.
- **Last Name:** Search for a mailpiece using the recipient's last name.
- **First Name:** Search for a mailpiece using the recipient's first name.

The **EXACT** option next to the First Name and Last Name fields determines whether the entered value must exactly match the name associated with the mailpiece.

Select **Clear** to remove the current search criteria and begin a new search.

Additional Search Options

Select **More...** to display additional fields that can be added to the search screen.

Available search fields include:

- Barcode
- Mailing



-
- Mailing Date
 - Address
 - Zip Code
 - Last Name
 - First Name
 - User-Defined 1
 - User-Defined 2
 - User-Defined 3
 - User-Defined 4
 - Service Type
 - Delivery Status
 - Expected Return Date
 - Expected Return Value
 - Visible in Track N Trace

Select the desired fields and then select **Done**. The selected fields will be available as additional search criteria on the Track Mailpiece screen.

Search Results

After selecting **Search**, matching mailpieces display in the results section. Select a mailpiece from the results to view the information associated with that piece.

The information available may include:

Mailpiece

- Recipient name
- Address
- User-Defined fields
- Mailpiece ID

Mailing

- Mailing name
- Mailing ID
- Mail Group
- Mailing date
- Delivery range

Shipment

- Shipment ID
- Drop facility



- Drop date
- First scan date
- Piece count

Delivery Estimates

Track N Trace may provide delivery estimates based on available information, including:

- Final Scan
- Historical Average
- USPS Service Standard

Delivery estimates are dependent on the tracking information available for the mailpiece and may not represent an actual delivery confirmation.

Destination and Scan Information

The **Destination** section displays information for the selected mailpiece, including its barcode and ZIP Code.

When USPS scan information is available, the **Scans** section provides the scan history for the mailpiece. Scan details may include:

- Date
- Facility
- City
- Operation
- Clock Stopped

Troubleshooting

If the expected mailpiece is not returned, first verify the **Mailing Date** range. The search only returns mailpieces that meet the criteria currently entered on the screen.

If too many results are returned, narrow the search by using a Mail Group, Mailing, recipient information, barcode, or another available search field.

If searching by recipient name does not return the expected result, verify the spelling and review whether **EXACT** is enabled. An exact search requires the value entered to match the information associated with the mailpiece.

If the mailpiece is displayed but the **Scans** section shows **No data available in table**, Track N Trace does not currently have scan information to display for that mailpiece. The presence of a mailpiece in Track N Trace does not guarantee that USPS scan data will be available.

A **No First Scan** or **No Final Scan** result indicates that the corresponding scan is not available in Track N Trace. Other information, such as the USPS Service Standard or Historical Average, may still be displayed and should not be interpreted as confirmation that the individual mailpiece was delivered.

Reporting

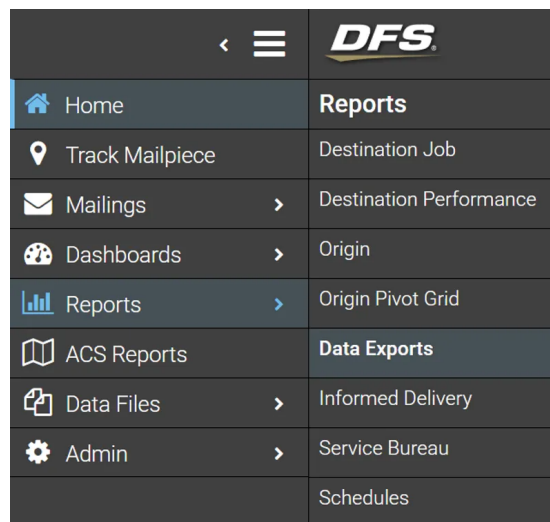
Scan Export Report

The **Scan Export** report provides detailed tracking and USPS scan information for mailpieces within one or more selected mailings. The report can be used to research mailpiece activity, review scan history, identify the last available scan, and export scan-level data for additional analysis or troubleshooting.

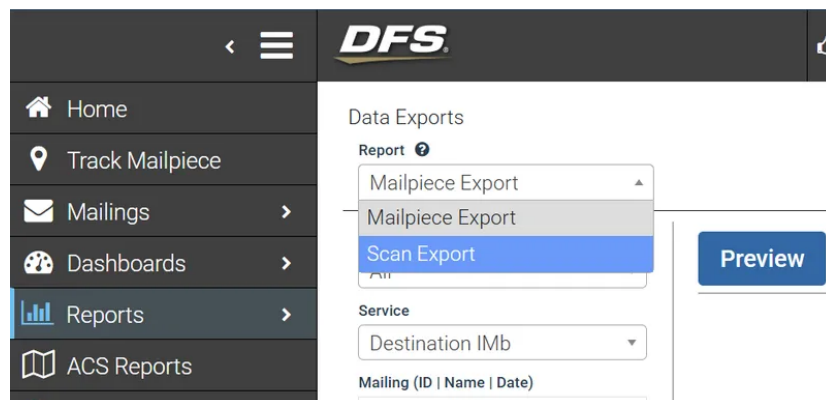
Unlike the **Track Mailpiece** screen, which is useful for researching individual mailpieces, the Scan Export report allows users to retrieve scan information for multiple mailpieces within selected mailings.

Accessing the Scan Export Report

1. From the left navigation menu, select **Reports**.
2. Select **Data Exports**.



1. From the **Report** dropdown, select **Scan Export**.



The Data Exports screen displays the available filters used to identify the mailings and mailpieces to include in the report.

Filtering the Report

Use the available filters to narrow the data included in the Scan Export.

Available filters include:



- **Company:** Limits results to the selected company.
- **Service:** Selects the mail tracking service. For mailpiece destination tracking, select **Destination IMb**.
- **Mailing (ID | Name | Date):** Search for and select one or more mailings. Mailings can be located using the search field above the list.
- **Mail Group:** Limits results to a selected Mail Group.
- **States:** Limits results based on state.

One or multiple mailings can be selected. When researching a specific job, searching by **Mailing ID** can quickly narrow the mailing list.

Previewing Scan Data

After selecting the appropriate mailing(s) and filters, select **Preview**.

The preview displays the available records matching the selected criteria and is useful for verifying that the correct mailing and data have been selected before requesting an export.

The preview displays a maximum of 300 rows. If the selected criteria return more than 300 records, only the first 300 rows will be displayed on the screen. The exported report is not limited to the records displayed in the preview.

The Scan Export contains detailed mailing, mailpiece, delivery, and scan information. Available information includes fields such as:

- Mailing ID
- Mailing Name
- Mailing Group
- Shipment ID
- Drop Facility
- Drop Date
- Entry Scan Date
- Barcode
- Routing ZIP
- Last Scan Date
- Last Scan Facility
- Estimated Delivery Date
- Days in System
- Delivery Address
- Full Name
- First Name
- Last Name
- User-Defined fields
- Scan Facility
- Scan Operation Code
- Scan Date
- Scan Time



- Scan Operation Description
- Final Scan indicator

Use the horizontal scroll bar at the bottom of the preview to review additional columns that are not immediately visible on the screen.

Understanding Scan Records

A mailpiece may appear on multiple rows in the Scan Export. Each row can represent a separate scan event associated with that mailpiece.

The **Scan Operation Code**, **Scan Date**, **Scan Time**, and **Scan Operation Description** provide information about individual scan activity. For example, the Scan Operation Description may identify processing activity or a logical delivery event.

Because the report contains scan-level data, the number of rows in the report should not be interpreted as the number of unique mailpieces.

Exporting the Report

After confirming the appropriate data, select the **Download/Export** icon located in the upper-right corner of the report area to request the export.

Scan Export files can contain a significant amount of data and **may take a long time to generate**. The report does not need to remain open while the export is being processed.

An email notification is sent when the requested report has finished generating and is available for download.

Downloading a Completed Export

The completed report is not downloaded directly from the Scan Export screen.

After receiving the email notification either follow the link in the email or:

1. Return to Track N Trace.
2. From the left navigation menu, select **Data Files**.
3. Select **Download Mail Files**.
4. Locate the completed Scan Export file and download it.

Troubleshooting

If the expected mailing does not appear, use the **Mailing (ID | Name | Date)** search field to search for the specific Mailing ID or other known mailing information. Also verify that other selected filters are not excluding the mailing.

If the preview returns unexpected results, verify the selected **Company**, **Service**, **Mailing**, **Mail Group**, and other filters before requesting the export.

If multiple mailings are selected, the resulting report can contain records from each selected mailing. Narrow the selection to a single mailing when researching a specific job or mailpiece.

If the preview contains what appear to be duplicate mailpieces, review the scan-related columns. A single mailpiece can have multiple scan events and therefore appear on multiple rows.

If the export does not appear immediately after it is requested, allow time for processing. Scan Export files can take a significant amount of time to generate. Wait for the email confirming that the report is available before attempting to retrieve the completed file



from **Data Files > Download Mail Files.**

Revision History

Revision Date	Updater Name	Description
August 19, 2026	Nikkita Parker	Initial document creation

9. Portal

Document Fulfillment Services offers a customer Portal that is designated to provide real-time access, easy navigation, and full control over all work orders. With our collection of helpful guides, you'll have everything you need to navigate the system effortlessly.

Navigate Portal Using the Following Guides:

[User Guide](#)[Creating a Campaign](#)[Demo Deck](#)[Portal Security Options](#)[SFTP & Data Transfer](#)[Widgets](#)[Work Order Life Cycle](#)[Work Order Request](#)

9.1. User Guide

Introduction

Welcome to the Portal Guide! This guide is here to help you navigate Portal with ease for a seamless experience with DFS.

What is the Portal?

Portal is our secure online platform that gives users direct access to their account with DFS. Portal offers secure file uploads, job approvals and rejections, real time production tracking, and a full postage ledger.

✓ Who is This Guide For?

This guide is for customers who want to use Portal to:

- Log in and configure their account
 - Manage role groups, permissions, and users
 - View and track work orders
 - Review and monitor postage usage and balances
 - Place and track inventory orders
 - Submit support requests
-

✓ How to Use This Guide?

Whether you're a new or returning user, this guide will help you get the most out of your customer portal.

Getting Started

How to register and log in

Dashboard Overview

Key sections and their functions

Account Management

Updating profile details and preferences

Inventory & Postage

Placing inventory orders, tracking job progress and viewing postage

Support & Troubleshooting

Submitting tickets, FAQs, and common navigation issues

✓ Getting Started

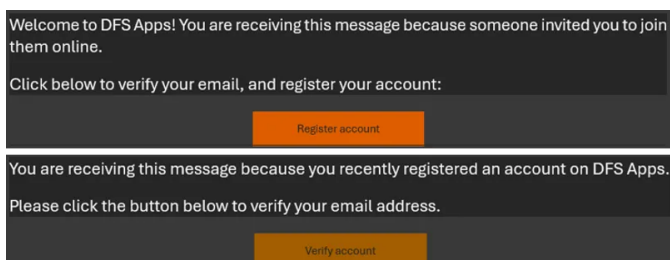
How to Register?

Step 1: DFS Creates a Primary User Account. Current users can also create accounts on behalf of other members of their organizations.

Before you can access Portal, DFS must create your primary user account with the default settings. To start this process, the user will need to provide the following basic information:

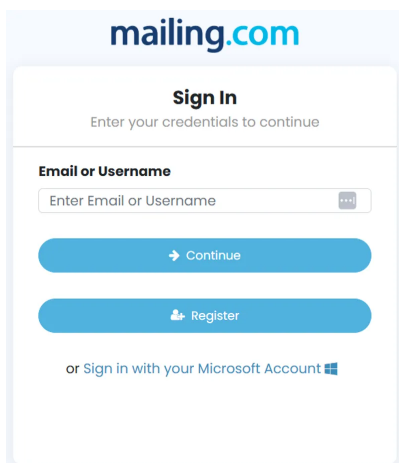
- Full Name
- Email Address

Once DFS sets up your primary user account, you will receive an email invitation with a link to complete your registration. Once you complete the registration, you'll receive the last email asking to verify your Account.



How to Log In?

1. After your account is active, visit the portal: <https://portal.dfsmail.com/>
2. Enter Your Email & Password
3. Click Sign In

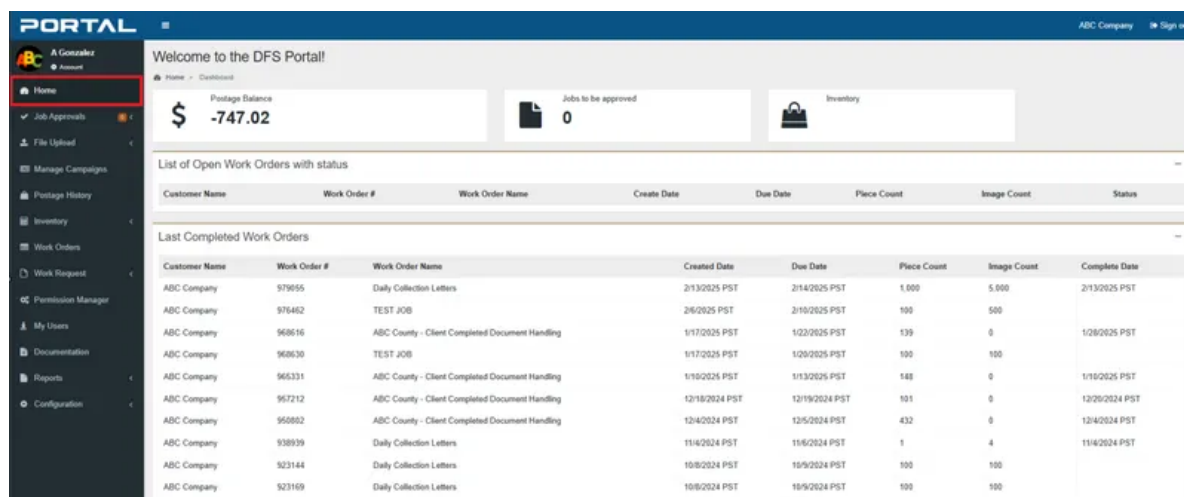


1. You will now have access to your Dashboard, where you'll see your Work Orders, Inventory, Upload, and have the ability to pull Reports, plus so much more.

Dashboard Overview

The Home Page serves as the central dashboard for your portal. Here, you can:

- View recent activity on your account
- Access quick links to commonly used features
- See an overview of pending tasks and job approvals
- Navigate to different sections using the menu



The screenshot shows the DFS Portal dashboard. The top navigation bar includes the user name 'A Gonzalez', the company 'ABC Company', and a 'Sign out' link. The main content area is titled 'Welcome to the DFS Portal!' and features three summary cards: 'Postage Balance' at -\$747.02, 'Jobs to be approved' at 0, and 'Inventory'. Below these are two tables. The first table, 'List of Open Work Orders with status', has columns for Customer Name, Work Order #, Work Order Name, Create Date, Due Date, Piece Count, Image Count, and Status. The second table, 'Last Completed Work Orders', has columns for Customer Name, Work Order #, Work Order Name, Created Date, Due Date, Piece Count, Image Count, and Complete Date. The left sidebar contains a menu with options like Home, Job Approvals, File Upload, Manage Campaigns, Postage History, Inventory, Work Orders, Work Request, Permission Manager, My Users, Documentation, Reports, and Configuration. The 'Home' option is highlighted with a red box.

Job Approvals

This job approval section allows you to review and approve jobs before they proceed to production and view a history of your approvals.

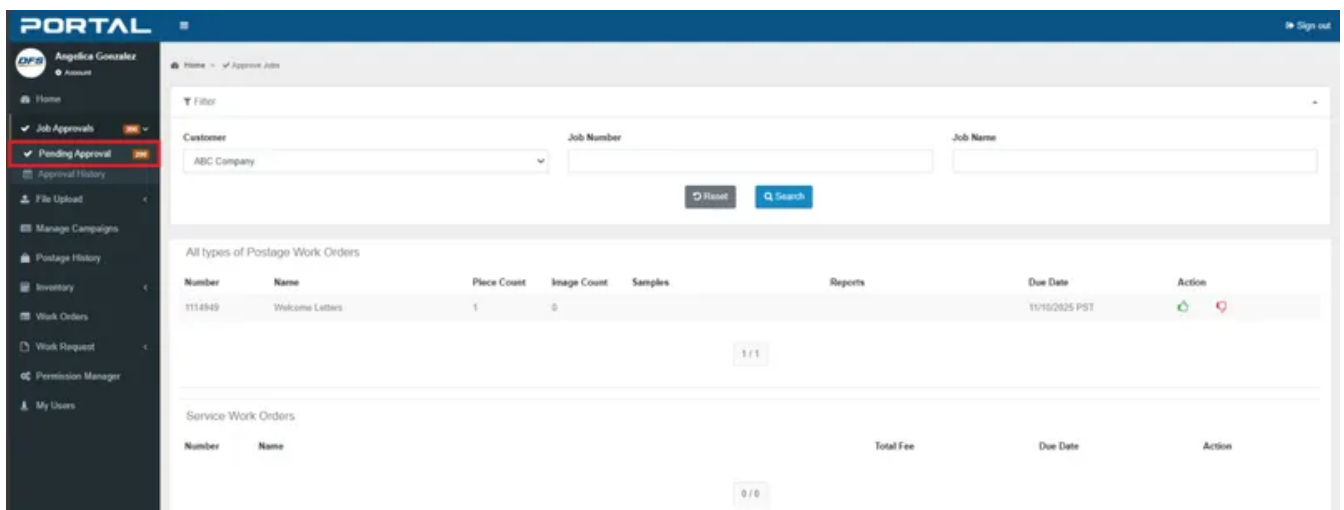
Jobs Pending Approval

Jobs that require your approval before production will appear here.

- List of all jobs awaiting approval, with the ability to filter through.
- You can expect a Report(s) and Sample(s) from your processed job, along with any customized reporting.

Work Order Action

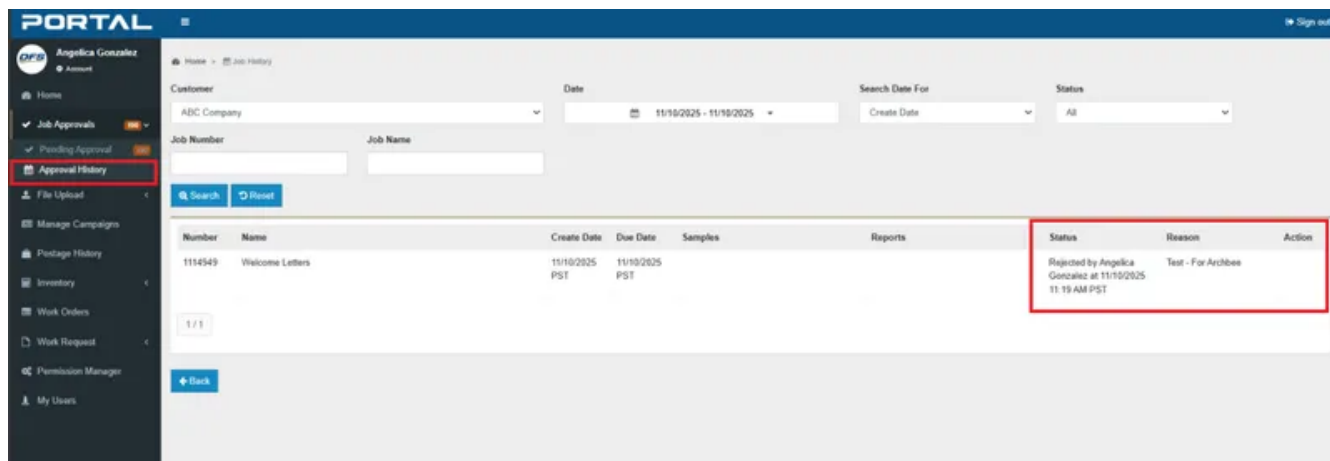
- **Green Thumbs Up = Approve**
 1. The Work Order will be released for Production.
- **Red Thumbs Down = Reject**
 1. The Work Order will be Rejected.
 2. Depending on your preferences, you will receive an email with the Rejection details.



Job Approval History

Track all previously approved or rejected jobs.

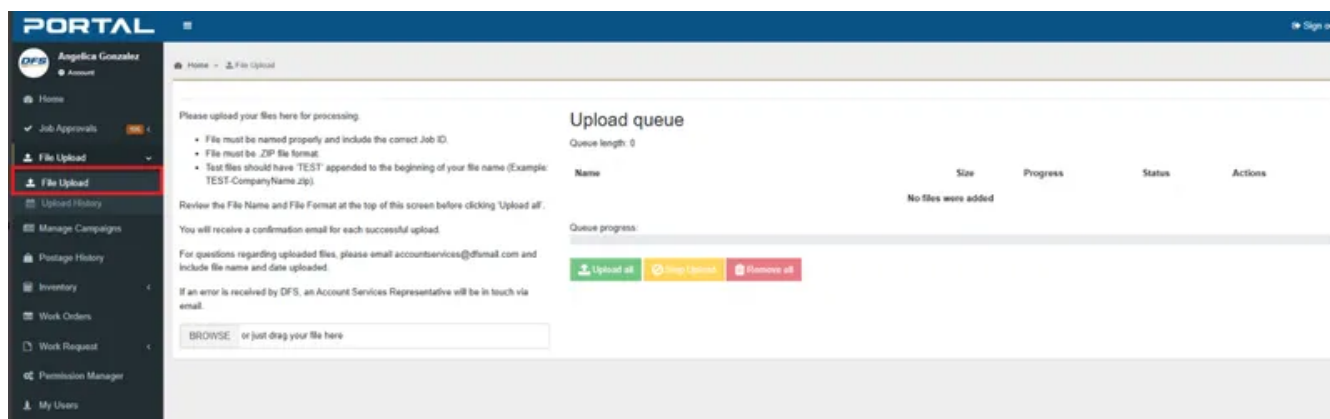
- View historical approvals and rejections with user details, date and timestamps, and associated reports and samples.
- Filter results by date range, job type, or status.



File Upload Options

Portal offers a secure method to upload files to DFS.

- Accepts multiple file formats (ZIP or PGP preferred, but can also accept single file uploads such as PDF, TXT, etc. when needed)
- Drag-and-drop or browse to upload files.
- Uploading with your provided Job ID triggers automation at DFS.



File Upload History

View a record of all uploaded files.

- Ability to view history of past uploads including file name, date submitted, and user who initiated the upload.
- Successful file uploads are stored for 45 days.

PORTAL ABC Company [Sign out](#)

A Gonzalez
Account

Home

Job Approvals

File Upload

File Upload

Upload History

Manage Campaigns

Postage History

Inventory

Work Orders

Work Request

Permission Manager

My Users

Documentation

Reports

Configuration

Home > Upload History

While your history is permanently kept, uploaded files are retained for only 45 days

Name	Date	Expiration Date	Customer	User	Status
This is a pdf.pdf	5/19/2023 1:48 PM	7/3/2023 1:48 PM	ABC Company	Natalie_1182	✓
DFS_BarcodeGuide.pdf	2/9/2021 8:25 AM	3/26/2021 9:25 AM	ABC Company	nin10doe	✓
DD_UploadTest_84072020.zip	4/7/2020 1:21 PM	5/22/2020 1:21 PM	ABC Company	nin10doe	✓
DD_UploadTest_84072020.zip	4/7/2020 1:18 PM	5/22/2020 1:18 PM	ABC Company	nin10doe	✗
DD_UploadTest_84072020.zip	4/7/2020 1:06 PM	5/22/2020 1:06 PM	ABC Company	nin10doe	✗

1 / 1

[Back](#)

Manage Campaigns

Manage marketing and operational campaigns from one place.

- Create, edit, and track campaigns.
- Assign jobs and layouts to campaigns.
- Monitor campaign setup and history.

PORTAL Angelica Gonzalez [Sign out](#)

A Gonzalez
Account

Home

Job Approvals

File Upload

Manage Campaigns

Postage History

Inventory

Work Orders

Work Request

Permission Manager

My Users

Home > Manage Campaigns

Customer:

Campaign Start Date:

Name:

Status:

[Search](#) [Reset](#) [Add](#)

Name	Status	Start Date	End Date
All time	Active	07/01/2025	12/31/2026
August 25 Payment Portal until March 26	Active	07/21/2025	03/25/2026
2025-11 November Savings Statement	Active	11/01/2025	10/31/2026
2025-11 November Loan Statement	Active	11/01/2025	10/31/2026
2025-11 November COD Statement	Active	11/01/2025	10/31/2026
2025-11 November ODA Statement	Active	11/01/2025	10/31/2026
November 2025	Active	11/01/2025	11/06/2025
2025-2026 MP2	Active	11/01/2025	11/15/2025

1 / 1

Postage History

Postage Usage

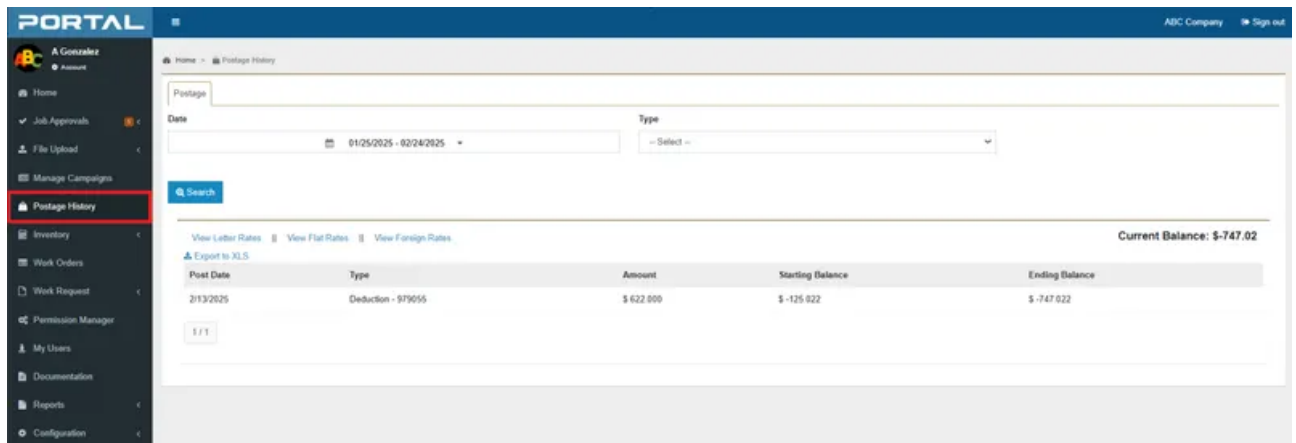
Track postage expenses and escrow balances for your account with DFS.

- Full ledger of postage usage and payments, with the ability to export.
- Monitor postage usage by work order or date range.
- View postage rates for your account.

Postage Escrow

- View Escrow balance.

- View Escrow payments.



PORTAL | A Gonzalez | Account | Home | Postage History | Sign out

Postage

Date: 01/25/2025 - 02/24/2025 | Type: -- Select --

[View Letter Rates](#) | [View Flat Rates](#) | [View Foreign Rates](#) | **Current Balance: \$-747.02**

[Export to XLS](#)

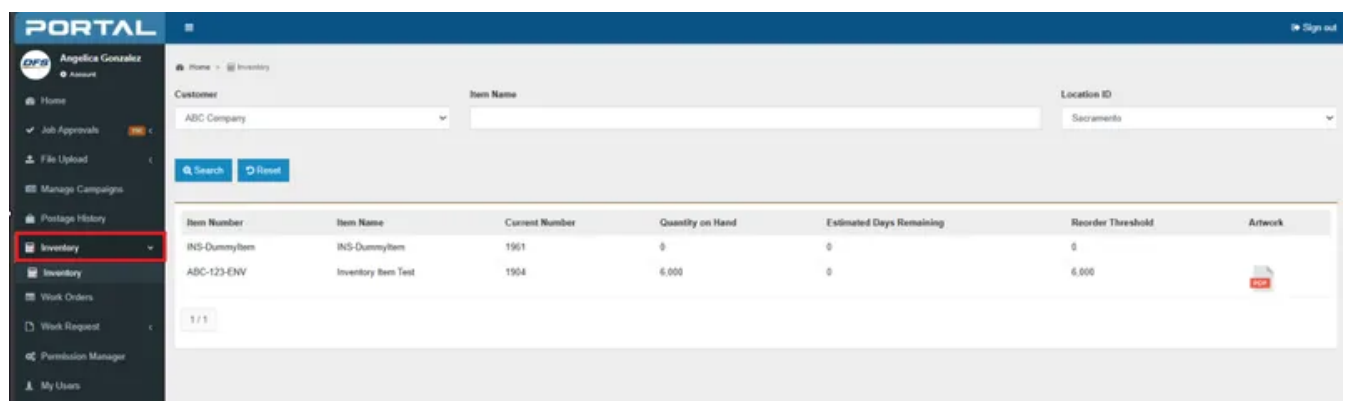
Post Date	Type	Amount	Starting Balance	Ending Balance
2/13/2025	Deduction - \$75055	\$ 622.800	\$ -125.822	\$ -747.022

1 / 1

Inventory

Monitor and manage your stored materials.

- View available inventory on hand at DFS.
- View images of your inventory items.
- Track inventory usage across all your jobs.



PORTAL | Angelica Gonzalez | Account | Home | Inventory | Sign out

Customer: ABC Company | Item Name: | Location ID: Sacramento

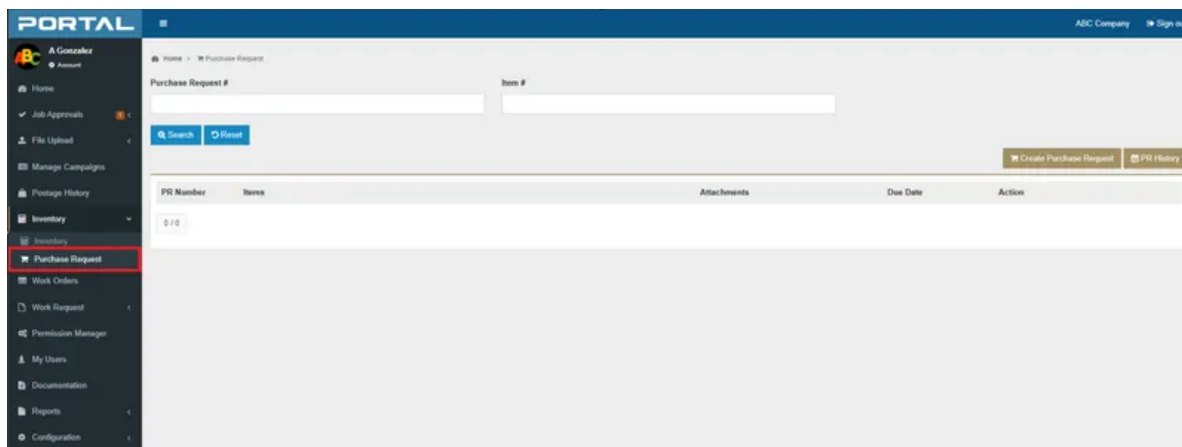
[Search](#) | [Reset](#)

Item Number	Item Name	Current Number	Quantity on Hand	Estimated Days Remaining	Reorder Threshold	Artwork
INS-DummyItem	INS-DummyItem	1961	0	0	0	
ABC-123-ENV	Inventory Item Test	1904	6,000	0	6,000	

1 / 1

Purchase Requests

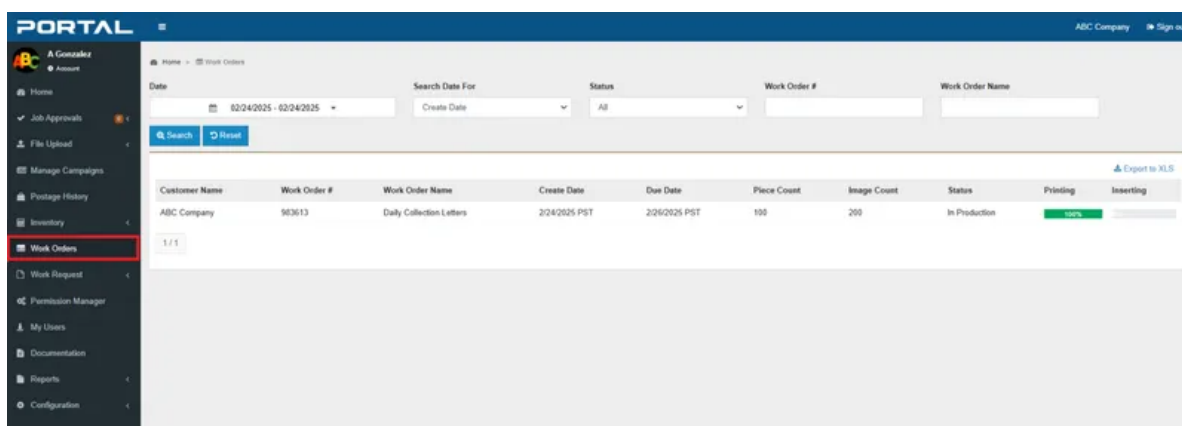
- Submit requests for inventory reorders to be procured by DFS.
- Submit requests for receivers for inventory deliveries to DFS.



Work Orders

This is where you will have full access to your work order progress at DFS.

- See all approved work orders as they move through production.
- Track real time progress of printing and inserting.
- Review historical jobs for completion date.
- Filters are available to assist with your search.



Work Requests

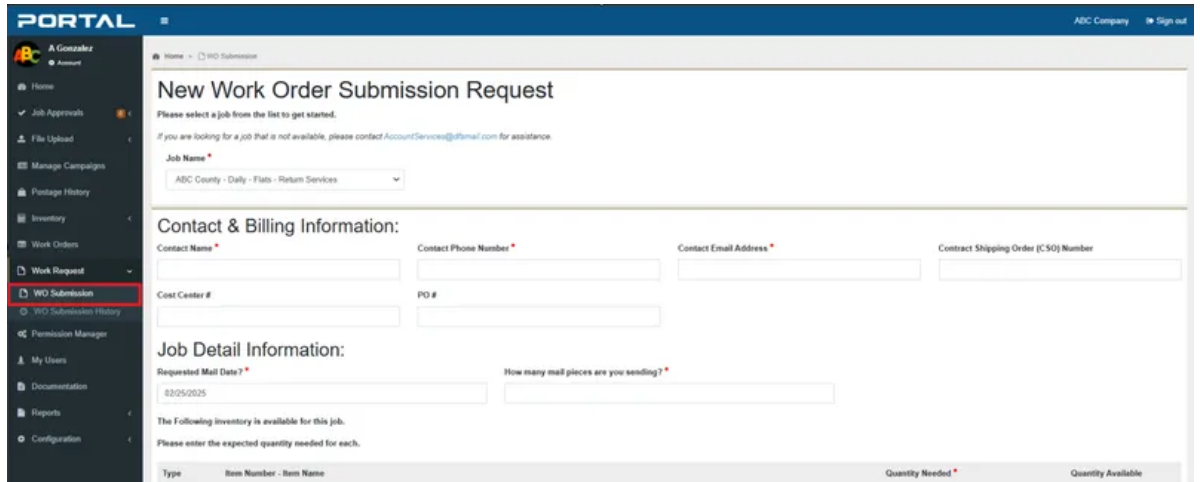
This is where you can access the DFS WO Request Submission process. This is a configurable job type that relies on you providing preprinted materials for insertion & mailing.

WO Submission

This process is used to submit a work order request to DFS when there is no associated data to process, such as jobs that are picked up for insertion and mailing only.

- Provide job details, including deadlines, requested inventory usage, pickup requirements, and special instructions.
- Attach relevant documents or sample files if available.

- Automated mail confirmation when the work order has been successfully submitted, along with a pickup ticket for courier & tracking through the process.



PORTAL ABC Company Sign out

Home > WO Submission

New Work Order Submission Request

Please select a job from the list to get started.
If you are looking for a job that is not available, please contact AccountServices@dfs.com for assistance.

Job Name *
ABC County - Daily - Flats - Return Services

Contact & Billing Information:

Contact Name * Contact Phone Number * Contact Email Address * Contract Shipping Order (CSO) Number

Cost Center # PO #

Job Detail Information:

Requested Mail Date * How many mail pieces are you sending? *

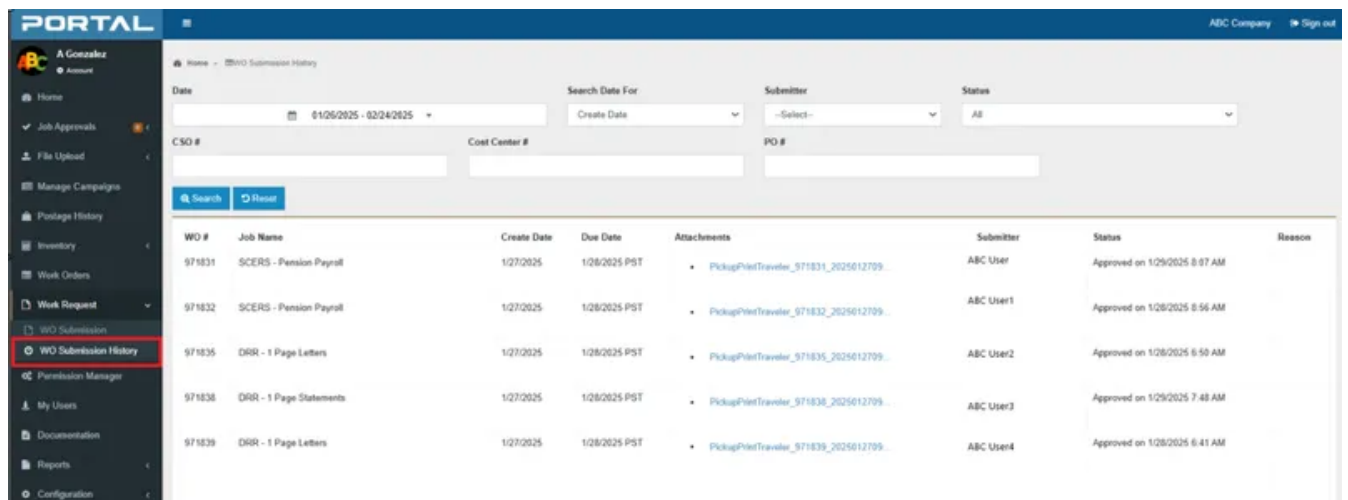
02/25/2025

The following inventory is available for this job.
Please enter the expected quantity needed for each.

Type	Item Number	Item Name	Quantity Needed *	Quantity Available
------	-------------	-----------	-------------------	--------------------

WO Submission History

Ability to view past work orders submitted via WO Submission, such as who submitted the WO, the WO number associated, and the full pickup ticket with all details submitted.



PORTAL ABC Company Sign out

Home > WO Submission History

Date: 01/26/2025 - 02/24/2025 Search Date For: Create Date Submitter: --Select-- Status: All

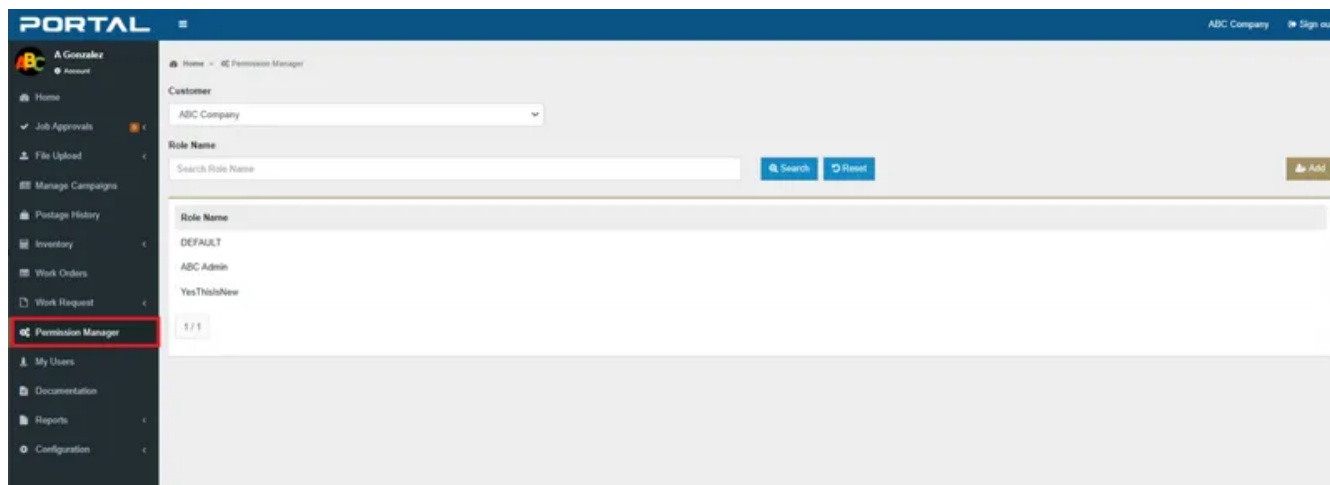
CSO # Cost Center # PO #

[Search](#) [Reset](#)

WO #	Job Name	Create Date	Due Date	Attachments	Submitter	Status	Reason
971831	SCERS - Pension Payroll	1/27/2025	1/28/2025 PST	PickupPrintTraveler_971831_2025012709...	ABC User	Approved on 1/29/2025 8:07 AM	
971832	SCERS - Pension Payroll	1/27/2025	1/28/2025 PST	PickupPrintTraveler_971832_2025012709...	ABC User1	Approved on 1/28/2025 6:56 AM	
971835	DRR - 1 Page Letters	1/27/2025	1/28/2025 PST	PickupPrintTraveler_971835_2025012709...	ABC User2	Approved on 1/28/2025 6:58 AM	
971838	DRR - 1 Page Statements	1/27/2025	1/28/2025 PST	PickupPrintTraveler_971838_2025012709...	ABC User3	Approved on 1/29/2025 7:48 AM	
971839	DRR - 1 Page Letters	1/27/2025	1/28/2025 PST	PickupPrintTraveler_971839_2025012709...	ABC User4	Approved on 1/28/2025 6:41 AM	

Permission Manager

The Permission Manager within Portal allows you to assign roles based on the level of access required for your team. All users are assigned the DEFAULT Role initially, which provides access to the permissions that are listed below.



Role Name: DEFAULT

If the permission is set to 'Yes', then that Role will have the following access options.

Role Permission	Access
Approve Jobs	The user can have access to view the screen, job history, samples, reports, approve/reject, view and limit each of those by job.
File Upload	The users can have access to view the screen, upload files.
Campaigns	The users can have access to view the screen, view campaign details, create a campaign, and edit campaign.
Postage History	The users can have access to view the postage history screen.
Inventory	The users can have access to view the inventory screen.
Approve Purchase Request	The users can have access to view the purchase request screen, view PR history, view attachments and approve or reject purchase requests.
Work Orders	The users can have access to view all work orders.
Documentation	The users can have access to view the documentation screen.
Reports	The users can have access to view reports.
Work Request	The users can have access to the WO submission tab.

Here is a look at how the page appears in Portal

Home >
Permission Manager >
Details Role

Role Name

DEFAULT

Approve Jobs

View Screen

Yes

View Job History

Yes

View Samples

Yes

View Reports

Yes

Approve or Reject

Yes

Limit By Job

No

View Jobs

File Upload

View Screen

Yes

Upload Files

Yes

Campaigns

View Screen

Yes

View Campaign Details

Yes

Create Campaign

Yes

Edit Campaign

Yes

Postage History

View Screen

Yes

Inventory

View Screen

Yes

Approve Purchase Request

View Screen

Yes

View PR History

Yes

View Attachments

Yes

Approve or Reject

Yes

Work Orders

View Screen

Yes

View Cancelled WO

Yes

Documentation

View Screen

Yes

Reports

View Reports

Yes

Work Request

WO Submission

Yes

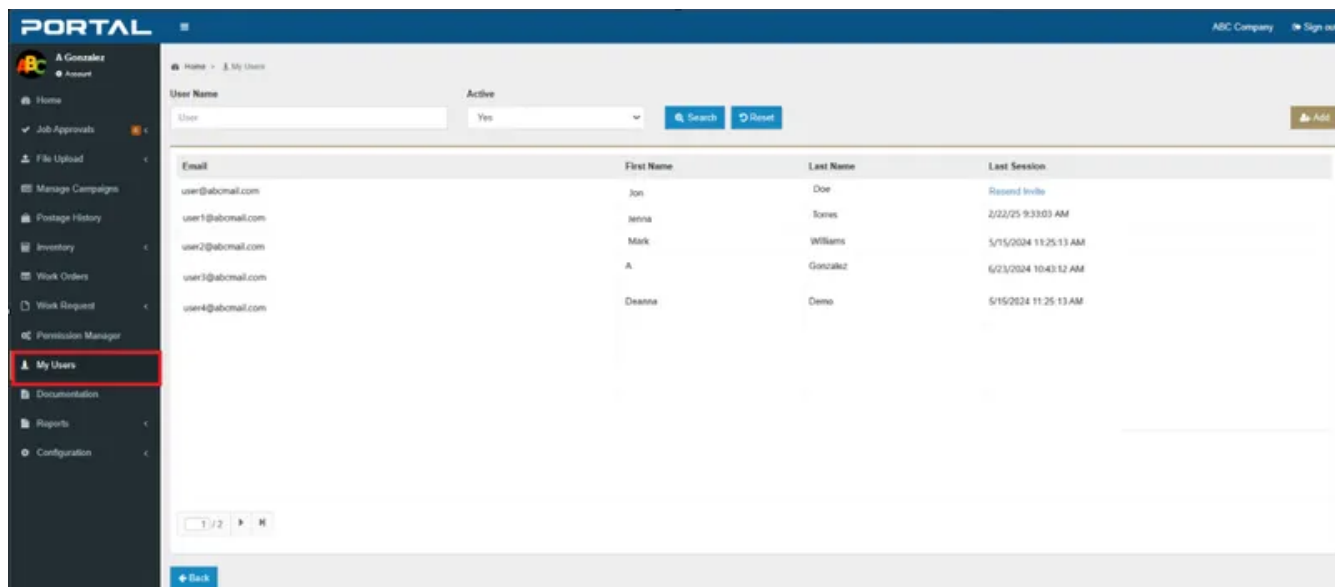
My Users

The My Users tab in Portal provides a comprehensive view of all users under your company profile, with the ability to manage each.

Key features of the My Users tab include:

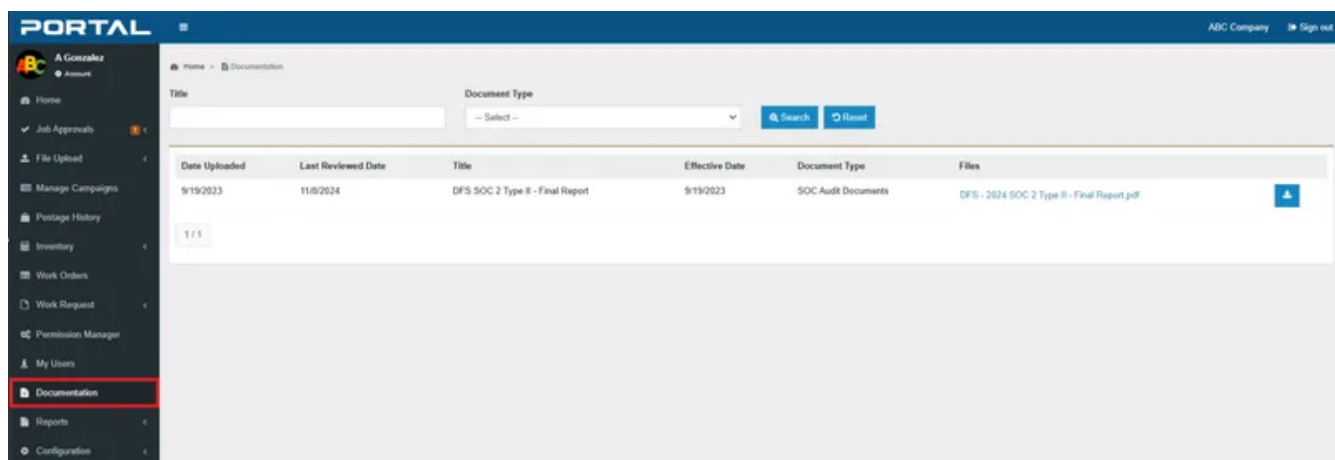
- A complete list of current and past users.
- Details on each user's last session history, including login timestamps.
- Assigned roles and corresponding access levels.
- A record of user activity within the portal, ensuring transparency and security.

This feature helps maintain efficient user management by providing insights into portal usage and access control.



Documentation

The documentation tab in Portal, when used, can be useful to store contracts, SOPs, and other generic documents and processes related to a specific customer.



Reports

The Reports tab in portal provides powerful reporting tools, allowing users to generate detailed data on postage usage, work order details, inventory usage, all filtered by date. Reports can be accessed and downloaded in PDF or Excel formats for easy analysis and record-keeping.

- Ability to pull data for postage used by dates
- Ability to pull WO Detail reporting
- Ability to pull Inventory usage by date
- Ability to pull an Entitlement Report for all users under your account

PORTAL ABC Company [Sign out](#)

A Gonzalez
Account

Home

- Job Approvals
- File Upload
- Manage Campaigns
- Postage History
- Inventory
- Work Orders
- Work Request
- Permission Manager
- My Users
- Documentation
- Reports**
 - Postage Usage by Date**
 - Work Order Details by Date
 - Inventory Usage by Date
 - Entitlement Report
 - Configuration

Home > Reports

Postage Usage by Date

Report Parameters

Format: Excel Date: 01/24/2025 - 02/24/2025 Search Date for: Create Date

[Download](#)

Home > Reports

Work Order Details by Date

Report Parameters

Format: PDF Date: 01/24/2025 - 02/24/2025 Search Date for: Create Date

[Download](#)

Home > Reports

Inventory Usage by Date

Report Parameters

Format: PDF Date: 01/24/2025 - 02/24/2025 Search Date for: Create Date ☐ Display Items by Job

[Download](#)

Entitlement Report Sample

Entitlement Report

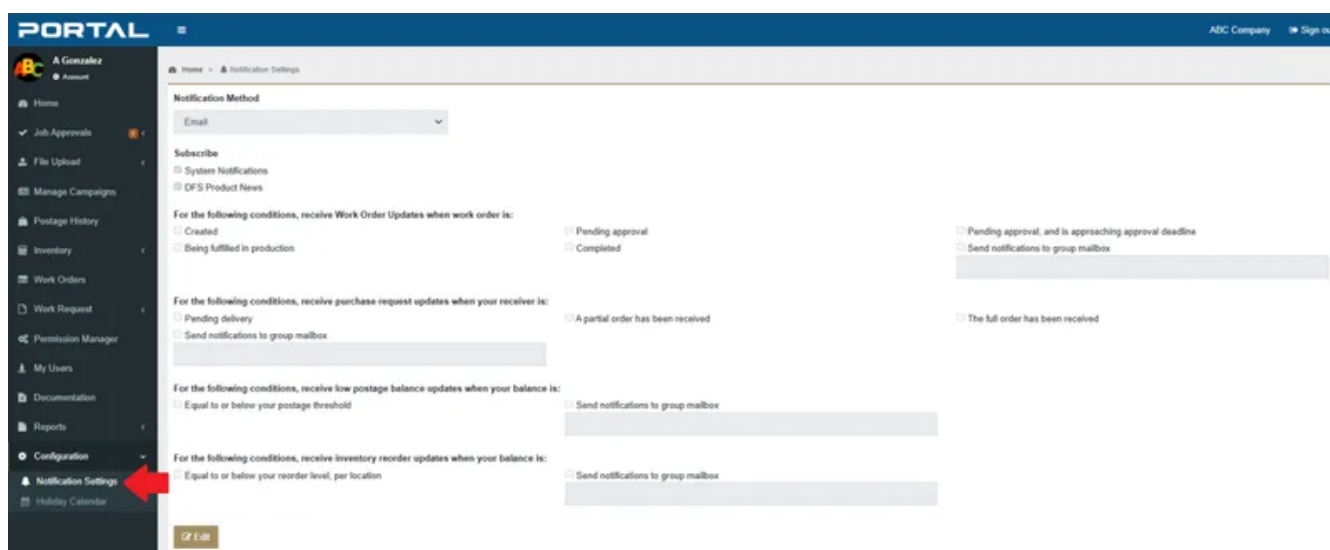
Never logged in								
		Portal		Vault				
Name	Email	Access	Role Name	Access	Role Name	Last Login Date	MFA Enabled	MFA Options
Jon Doe	user1@abcmail.com	Yes	DEFAULT	Yes	All Features	Never Logged In	No	

Logged in during past 30 days								
		Portal		Vault				
Name	Email	Access	Role Name	Access	Role Name	Last Login Date	MFA Enabled	MFA Options
Jenna Torres	user1@abcmail.com	Yes	DEFAULT	Yes	Document Management	22-Feb-25	No	
Mark Willias	user2@abcmail.com	Yes	DEFAULT	Yes	All Features	15-May-24	No	
A Gonzalez	user3@abcmail.com	Yes	DEFAULT	Yes	All Features	23-Jun-24	No	
Deanna Demo	user4@abcmail.com	Yes	DEFAULT	Yes	All Features	15-May-24	No	

Configuration

The Configuration tab in portal allows users to view and update notification settings for their Jobs, Inventory, and Postage. Additionally, it provides access to the Holiday Calendar, which displays scheduled closure days for DFS.

A portal user can subscribe to receive System Notifications and/or DFS Product News. This is extremely important as it gives you, the customer, visibility on all aspects of your job and if used correctly, can be a great asset to be proactive and engaged when working with DFS.



PORTAL A Gonzalez Account ABC Company Sign out

Home > Notification Settings

Notification Method
Email

Subscribe
☐ System Notifications
☐ DFS Product News

For the following conditions, receive Work Order Updates when work order is:
☐ Created ☐ Pending approval ☐ Pending approval, and is approaching approval deadline
☐ Being fulfilled in production ☐ Completed ☐ Send notifications to group mailbox

For the following conditions, receive purchase request updates when your receiver is:
☐ Pending delivery ☐ A partial order has been received ☐ The full order has been received
☐ Send notifications to group mailbox

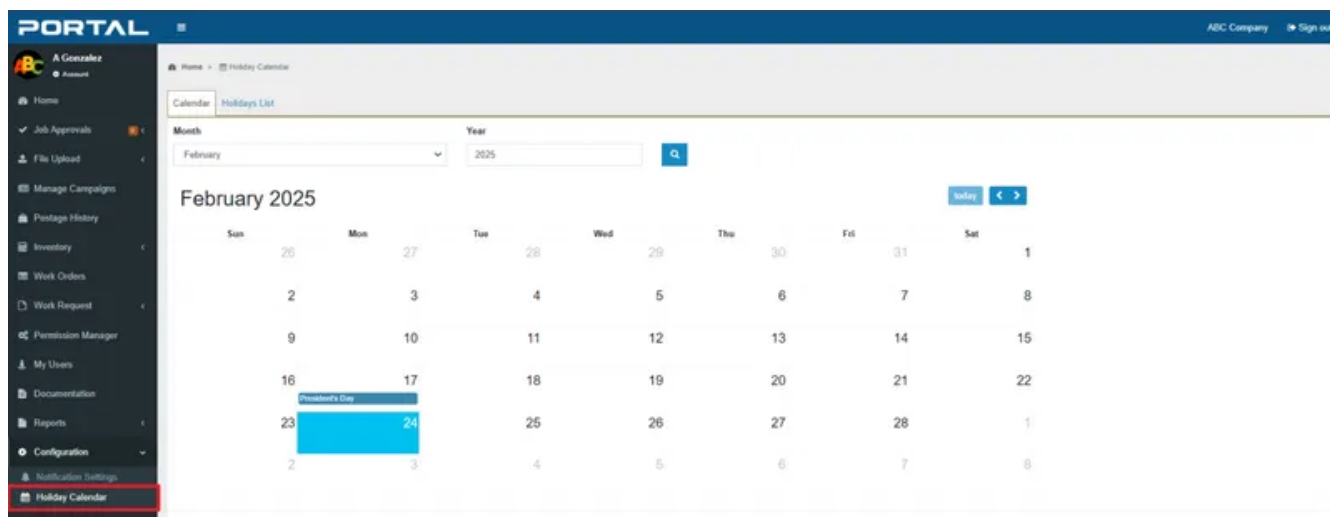
For the following conditions, receive low postage balance updates when your balance is:
☐ Equal to or below your postage threshold ☐ Send notifications to group mailbox

For the following conditions, receive inventory reorder updates when your balance is:
☐ Equal to or below your reorder level, per location ☐ Send notifications to group mailbox

LE Edit

Holiday Calendar

Any DFS observed holidays are noted here for visibility.



PORTAL A Gonzalez Account ABC Company Sign out

Home > Holiday Calendar

Calendar Holidays List

Month: February Year: 2025

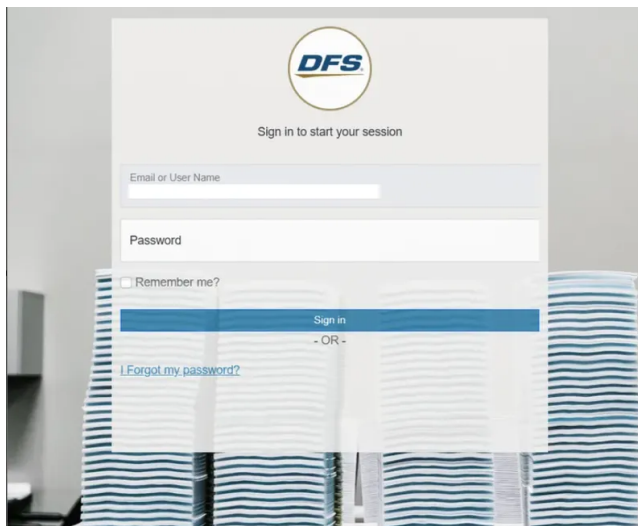
February 2025

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17 President's Day	18	19	20	21	22
23	24	25	26	27	28	1
2	3	4	5	6	7	8

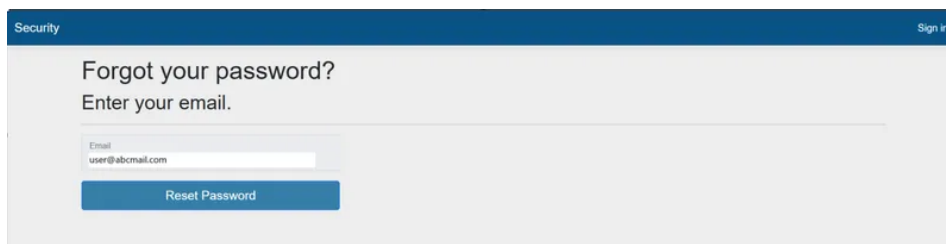
✓ FAQ's

✓ How can I reset my password?

Accounts are locked out when there are 5 unsuccessful login attempts. To Reset your password, simply click "I Forgot my password" below the login fields, and follow the prompts.



Enter your email, and you'll receive a link to Reset your Password.



✓ Why is my file not processing?

If your file is not processing, here are some scenarios to check for before uploading again:

- File name is incorrect or missing Job ID followed by a dash.
- Is it a zip file?
 - Internal contents of the zip file could also be named incorrectly if it's part of your setup to have designated file names.
- Is your file format correct?

✓ How do I Approve my job?

To approve your job, navigate to Portal/Pending Approval tab, you will see a list of work orders that require your attention, to approve the work order, click on the GREEN thumbs up option.

✓ **How do I Reject my job?**

To reject your job, navigate to Portal/Pending Approval tab, you will see a list of work orders that need your attention, to Reject your work order, click on the RED thumbs down option.

✓ **How do I check on the status of a Work Order?**

To check on your work order status, click on the button below. here you'll find a list of your jobs with real time progress updates.

[Check WO Status](#)

✓ **Where can I upload my file?**

To upload your file with your approved format & Job ID, access the link below and follow the prompts.

[Upload a File](#)

✓ **How can I see my file upload history?**

To view past history of jobs that have been uploaded via Portal, click here:

[Job Upload History](#)

✓ **How do I create a Campaign in Portal?**

Please refer to the [How can I create a Campaign?](#) for more detailed information.

✓ **Where can I see my Postage Balance and transactions?**

To view postage balances and past transactions, click here:

[Postage Balance](#)

✓ **How can I view my current inventory levels stored at DFS?**

If you have inventory stored at DFS and would like to know how much is on hand, view artwork, place an order, view past usage history, click here:

[My Inventory](#)

✓ How to request a Work Order Review?

Do you have questions about a past job? Request a WO Review via Account Services.

To ensure we can thoroughly review a completed job, we kindly ask you to submit a ticket by using the links below. Please also add the requested information when submitting a ticket. Providing detailed and accurate information will help our team assess your concerns and determine the best course of action.

1 Submit a Ticket

2

Request a Work Order Review

3 Add the following information in the ticket:

- ☐ Customer Name
- ☐ Work Order Number
- ☐ File Name or other identifiable marks in the file like a Case Number
- ☐ Photos of full mail contents and envelope, including all edges, please do not crop images.
- ☐ Exact description of the issue as reported to you (if applicable)

✓ How can I Pull/Hold my job from Production?

You've approved your job, but need to make changes? You can put in a request to pull or hold a job by submitting a ticket to Account Services.

Although DFS cannot guarantee a job pull/hold after approval, providing the information below as soon as you've noticed an issue, will help us expedite your requests.

- **Work Order Number**
- **Request Type: Pull and Cancel / Pull and Hold**
 - Our production team makes every effort to accommodate your request; it all depends on how far in the process the job is.
 - In cases where materials have been produced, a written request to destroy will be required.

Request to Pull/Hold my Job

To understand the cycle a Work Orde goes through, see [Work Order Life Cycle](#)

✓ **Have questions about your job mailing on time or mail not being received with the end recipient?**

We strongly recommend you view your work order history and details to check when the job in question mailed. Mailed dates are displayed in real-time.

We also invite you to visit the USPS website for more resources on mailing timelines.

[USPS - FAQs](#)

✓ **How can I submit a Work Order Request for Insertion and Mailing only?**

If you need your printed job to be picked up for insertion and mailing, please check out our Work Order Request/WO Submission process.

Work Order Request

[WO Submit Request](#)

✓ **How can I grant access to an ew user?**

To add a User to your account, navigate to Portal/My Users tab.

- 1 Click Add User
- 2 Enter a valid email address for the user you are attempting to invite
- 3 Choose what access roles you'd like them to have access to
- 4 They'll receive a registration email where they'll need to fill out some basic information to access Portal.
- 5 [Add User](#)

Create a Support Ticket

If you need further assistance, send a ticket into our system by using the button below.

[Email Account Services](#)

✓ Roles and Responsibilities

Name	Role	Responsibilities
Natalie Griffel	Project Manager	• Measure and verify project scope. • Facilitate scope change requests. • Facilitate impact assessments of scope change requests. • Organize and facilitate scheduled change control meetings. • Communicate outcomes of scope change requests. • Update project documents upon approval of all scope changes.
Account Services	Team Member/User	• Manage user access, troubleshoot issues, and oversee portal configurations. • Provides technical assistance, resolves user issues, and escalates issues with IT when needed.
Developers	Team Member	• Maintain and enhance the portal's functionality based on feedback and evolving requirements.
Customer Users	User	• Responsible for accessing and utilizing the portal's features according to their role-based permissions.

✓ Revision History

Version Date	Updater Name	Description
February 4, 2025	Angelica Gonzalez	Initial draft
February 12, 2025	Deanna Dockter	Edits for flow and content
November 10, 2025	Angelica Gonzalez	Updates to screenshots
May 4, 2026	Angelica Gonzalez	Updates to document steps
August 14, 2026	Angelica Gonzalez	Edits to document screenshots

9.2. Creating a Campaign

Introduction

Welcome to the Campaign Setup Guide! Whether you're launching a marketing campaign for the first time or editing an existing one, this guide will walk you through the essential steps to ensure a smooth and successful Campaign setup.

What is a Campaign?

A well-structured campaign requires a combination of strategic planning, system configuration and automation. Customers can opt into campaign setup at the time of onboarding or for current customers, this is a programming update. A marketing image can be added to Statements. These are all images provided by you, the customer, which are required to meet certain criteria for correct setup.

✓ Who Can Create a Campaign?

- **DFS Representatives:** DFS coordinates campaign Statement Layouts and Data Points based on customer's setup requirements. This step is required before Customers and Brokers can engage.
- **Customer:** After DFS setup, Customers can login to Portal and create or modify a Campaign for their associated job(s).
- **Broker:** After DFS setup, Brokers can login to Portal and create or modify a Campaign on behalf of their customer. This adds another layer of support for the Customer.

✓ How to Use This Guide

This guide will help you become familiarized with the Campaign features inside Portal.

Getting Started

How to Log In

Campaign Overview

Required criteria to correctly setup a campaign

Support & FAQs

Most frequently asked questions, and a link to direct customer support

✓ Getting Started

How to Log In?

Make sure you have access to Portal, and that your account is configured for Campaigns. For assistance with access, please submit a support ticket to DFS Account Services.

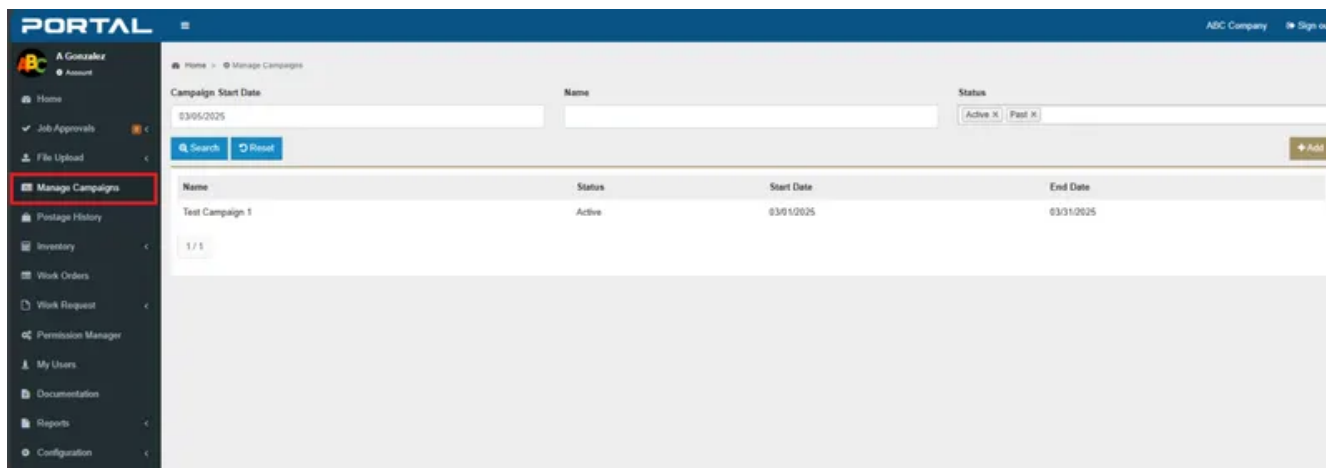
[Manage Campaign](#)

✓ Campaign Overview

Manage Campaigns

Here are some functions of this screen:

- **Campaign Start Date** - Displays when a campaign began or is scheduled to begin.
- **Name of the Campaign** - Shows the title of the identifier for the campaign.
- **Status** - Indicates whether the campaign is Active, or Inactive.
- **Search Options** - Users can search for campaigns by entering the above fields. View active or past campaigns and the details of how they were set up.
- **Reset Button** - Allows users to clear the search filters and refresh the list to display all available campaigns.
- **Add+ Button** - This allows user to setup a campaign.
- **The Start & End Date** - Allows quick visibility for users when figuring out dates.



Limitations & Requirements

Make sure the following information is readily available at the time of campaign setup:

- **Date Range**
 - Dates are extremely important; a past Campaign's date range cannot overlap a new/active campaign's date range.
 - Start Date - When you want the campaign to start, based on when your job will be transmitted to DFS.
 - End Date - When you want the campaign to end, so that another can begin.
- **Images**
 - A Campaign can support multiple, variable images
 - Formats accepted:
 - .jpg, .png
 - High Resolution
 - Approved Sizes:
 - Determined during setup, based on the Job Type and Position.
 - Image Name:

- We recommend you name your image(s) with something that you'll easily recognize as you set up the Campaign.

- **Positions:**

- A specific location on your job for the campaign image(s) to reside, determined during job setup.

*****This is limited to One campaign per job.***

Add/Edit Campaign

1. From the Manage Campaign tab in Portal. Click '+Add'

2. Fill out the fields according to the needs of the campaign:

1. **Campaign Name:** Name your campaign

2. **Statement:** A list of your approved Statement jobs will show here. You will set 1 Campaign per Job.

3. **Start Date:** When you want the campaign to start.

4. **End Date:** When you want the campaign to stop.

1. *Please ensure your campaign dates do not overlap. One should end before another begins (12/31/2024End, 1/1/2025Start)*

5. **Status:** Active/Pending

1. You cannot have two Active campaigns. If you mark one as Active, the system will automatically mark the other one as Pending.
3. Edit Campaign Details:
 1. Upload all needed images.
 1. You can only add one Image at a time.
 2. You can remove images as long as they are not attached to a position/criteria.
4. Set the Criteria/Rules for your Campaign:
 1. **Data Point:** You will see all Data Point options based on setup. Data Points can be set as a string, or text. Examples of data points are:
 1. Account Number
 2. Product Name
 3. Balances
 4. Addresses or Zip Codes
 2. **Condition:** You will see conditions based on the Data Point selected.
 1. Is equal to
 2. Is not equal to
 3. is blank
 4. is not blank
 5. contains
 6. does not contain
 7. begins with
 8. does not begin with
 9. ends with
 10. does not end with
 3. **Compare Value:**
 1. If the Condition (Previews step) is set to 'Is Equal to', or 'Does not contain' then this value will be enabled.
 2. The logic will require a value to be entered.
 4. **Images:**
 1. The Images drop down provides a list of all images previously added to the Campaign.
 5. **Example:**

Campaign Position/Criteria

+ Campaign Criteria for UpperRight Size: 1x3 Description: Upper Right

Data Point: Account Number	Condition: does not contain	Compare Value: 9999	Image: CWD Closed Door.jpg	Delete
Data Point: Account Number	Condition: is not blank	Compare Value: 	Image: CWD Closed Door.jpg	Delete Anything else, gets this default image. ←

+ Campaign Criteria for Bottom Size: 2x5 Description: Bottom

Data Point: Product Name	Condition: is equal to	Compare Value: Invoice	Image: CWD Closed Door.jpg	Delete
Data Point: Account Number	Condition: is between	Compare Value: 100	Image: CWD Closed Door.jpg	Delete ←

[Cancel](#) [Save](#)

5. Don't forget to save your campaign!

6. When adding a complex campaign, it is recommended to upload a TEST FILE to ensure the campaign is working as intended.

1. This is a WO that must be rejected.

FAQs

✓ How can I know that I setup my campaign correctly?

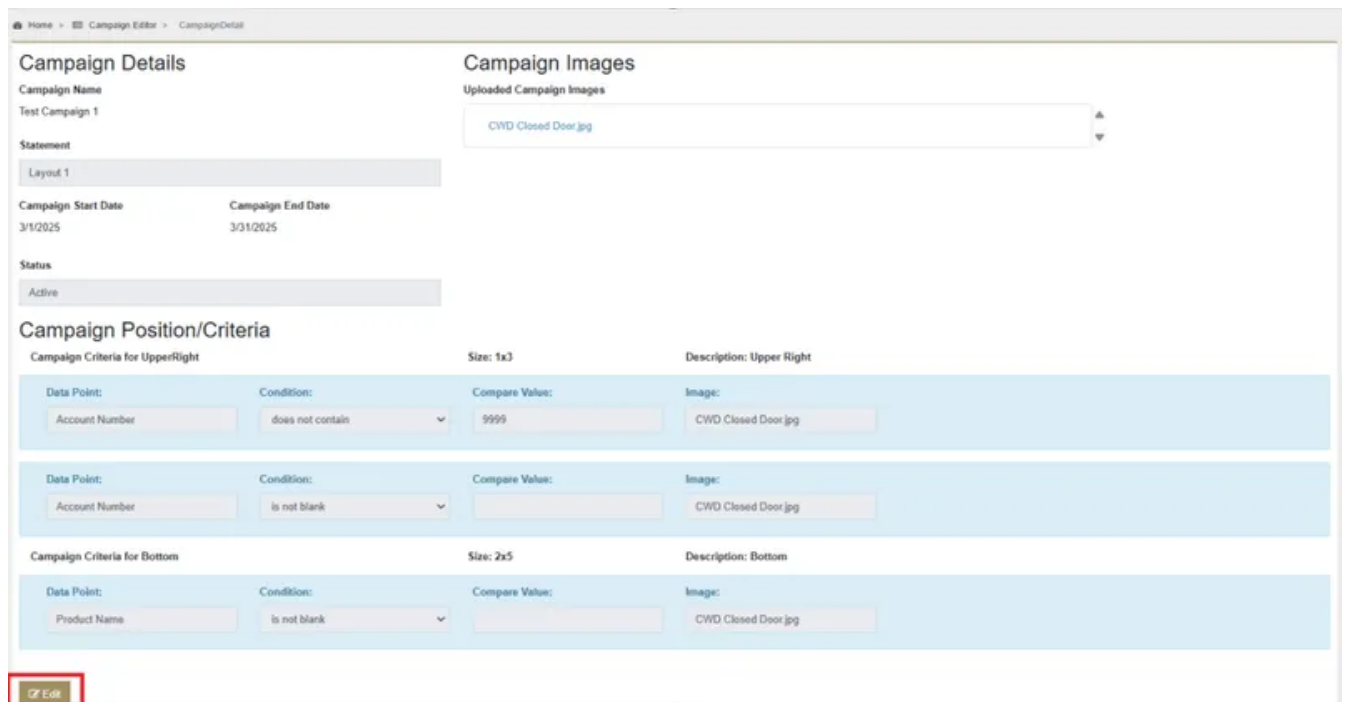
Submit a TEST Work order to test the campaign is working as intended.

- Please ensure that the work order created is Rejected as it is a Test and cannot mail.

[Upload Test File](#)

Can I Edit/Terminate an existing Campaign?

Yes! Simply navigate to the campaign and click on the 'Edit' button at the bottom. You can now edit your campaign.



The screenshot shows the 'Campaign Editor' interface. It includes sections for 'Campaign Details' (Campaign Name: Test Campaign 1, Statement: Layout 1, Campaign Start Date: 3/1/2025, Campaign End Date: 3/31/2025, Status: Active), 'Campaign Images' (Uploaded Campaign Images: CWD Closed Door.jpg), and 'Campaign Position/Criteria'. The 'Campaign Position/Criteria' section has two main areas: 'Campaign Criteria for UpperRight' (Size: 1x3, Description: Upper Right) and 'Campaign Criteria for Bottom' (Size: 2x5, Description: Bottom). Each area contains fields for Data Point, Condition, Compare Value, and Image. The 'Edit' button is highlighted at the bottom left.

Create a Support Ticket

If you need further assistance, send a ticket into our system by using the button below.

[Email Account Services](#)

Roles and Responsibilities

Name	Responsibilities
Account Services	- Manage user access, troubleshoot issues, and oversee portal> Campaign configurations. - Provides technical assistance, resolve user issues, and escalates issues with Programming when needed.
Programmer	- Configures campaign setup based on customer requirements at the time of onboarding. - Tests and troubleshoots setup to minimize issues when going live.
Customer Users	Responsible for accessing and utilizing the portal's campaign features according to their needs.

▼ **Revision History**

Version Date	Updater Name	Description
February 27, 2025	Angelica Gonzalez	Initial draft

9.3. Demo Deck

1 Portal

2 Dashboard Home

PORTAL

ABC Company Sign out

ABC

A Gonzalez

Account

Home

Job Approvals

File Upload

Manage Campaigns

Postage History

Inventory

Work Orders

Work Request

Permission Manager

My Users

Documentation

Reports

Configuration

Welcome to the DFS Portal!

Home > Dashboard

Postage Balance

\$ -747.02

Jobs to be approved

0

Inventory

List of Open Work Orders with status

Customer Name	Work Order #	Work Order Name	Create Date	Due Date	Piece Count	Image Count	Status

Last Completed Work Orders

Customer Name	Work Order #	Work Order Name	Created Date	Due Date	Piece Count	Image Count	Complete Date
ABC Company	983613	Daily Collection Letters	2/24/2025 PST	2/26/2025 PST	100	200	2/24/2025 PST
ABC Company	979055	Daily Collection Letters	2/13/2025 PST	2/14/2025 PST	1,000	5,000	2/13/2025 PST
ABC Company	976462	TEST JOB	2/6/2025 PST	2/10/2025 PST	100	500	
ABC Company	968616	ABC County - Client Completed Document Handling	1/17/2025 PST	1/22/2025 PST	139	0	1/28/2025 PST
ABC Company	968630	TEST JOB	1/17/2025 PST	1/20/2025 PST	100	100	
ABC Company	965331	ABC County - Client Completed Document Handling	1/10/2025 PST	1/13/2025 PST	148	0	1/10/2025 PST
ABC Company	957212	ABC County - Client Completed Document Handling	12/18/2024 PST	12/19/2024 PST	101	0	12/20/2024 PST
ABC Company	950802	ABC County - Client Completed Document Handling	12/4/2024 PST	12/5/2024 PST	432	0	12/4/2024 PST
ABC Company	938939	Daily Collection Letters	11/4/2024 PST	11/6/2024 PST	1	4	11/4/2024 PST
ABC Company	923144	Daily Collection Letters	10/8/2024 PST	10/9/2024 PST	100	100	

3 Job Approvals

Pending Approval

PORTAL

ABC Company Sign out

A Gonzalez

Account

Home

Job Approvals

Pending Approval

Approval History

File Upload

Manage Campaigns

Postage History

Inventory

Work Orders

Work Request

Permission Manager

My Users

Documentation

Reports

Configuration

Home > Approve Jobs

Job Number

Job Name

Search

Reset

Number	Name	Piece Count	Image Count	Samples	Reports	Due Date	Action
984616	ABC County - Client Completed Document Handling	10	20			2/26/2025 PST	

1 / 1

4 Approval History

PORTAL

ABC Company Sign out

A Gonzalez

Account

Home

Job Approvals

Pending Approval

Approval History

File Upload

Manage Campaigns

Postage History

Inventory

Work Orders

Work Request

Permission Manager

My Users

Documentation

Reports

Configuration

Home > Job History

Date

01/28/2025 - 02/26/2025

Search Date For

Create Date

Status

All

Job Number

Job Name

Search

Reset

Number	Name	Create Date	Due Date	Samples	Reports	Status	Reason	Action
983613	Daily Collection Letters	2/24/2025 PST	2/26/2025 PST			Approved by A Gonzalez at 2/24/2025 1:24 PM PST		
979055	Daily Collection Letters	2/13/2025 PST	2/14/2025 PST			Approved by A Gonzalez at 2/13/2025 8:45 AM PST		
976462	TEST JOB	2/6/2025 PST	2/10/2025 PST			Approved by Angelica Gonzalez at 2/6/2025 12:37 PM PST		

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5 File Upload

File Upload

PORTAL

ABC Company Sign out

A Gonzalez

Account

Home

Job Approvals

File Upload

File Upload

Upload History

Manage Campaigns

Postage History

Inventory

Work Orders

Work Request

Permission Manager

My Users

Documentation

Reports

Configuration

Home > File Upload

Current Number	Job Name	Filename Format
2201	Final Notice Letters	2201-{YourDetailsHere}.zip
2228	Daily Collection Letters	2228-{YourDetailsHere}.zip
2229	TEST JOB	2229-{YourDetailsHere}.zip
2244	Welcome Letters	2244-{YourDetailsHere}.zip
3769	Return Mail Test	*.*

Please upload your files here for processing. A confirmation email will be sent for each successful upload.

Note: Your job must be named properly for it to process successfully. Please review the File Name Format at the top of this screen to ensure your job is properly named.

If you are uploading a test file, append TEST- to the beginning of your file name (Example: TEST-CompanyName.zip)

BROWSE or just drag your file here

Upload queue

Queue length: 0

Name	Size	Progress	Status	Actions
No files were added				

Queue progress:

Upload all

Stop Upload

Remove all

6 File Upload History

PORTAL

ABC Company Sign out

A Gonzalez

Account

Home

Job Approvals

File Upload

File Upload

Upload History

Manage Campaigns

Postage History

Inventory

Work Orders

Work Request

Permission Manager

My Users

Documentation

Reports

Configuration

Home > Upload History

While your history is permanently kept, uploaded files are retained for only 45 days

Name	Date	Expiration Date	Customer	User	Status
This is a pdf.pdf	5/19/2023 1:48 PM	7/3/2023 1:48 PM	ABC Company	Natalie_1182	✓
DFS_BarcodeGuide.pdf	2/9/2021 8:25 AM	3/26/2021 9:25 AM	ABC Company	nin10doe	✓
DD_UploadTest_04072020.zip	4/7/2020 1:21 PM	5/22/2020 1:21 PM	ABC Company	nin10doe	✓
DD_UploadTest_04072020.zip	4/7/2020 1:18 PM	5/22/2020 1:18 PM	ABC Company	nin10doe	✗
DD_UploadTest_04072020.zip	4/7/2020 1:06 PM	5/22/2020 1:06 PM	ABC Company	nin10doe	✗

1 / 1

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7 Campaigns

PORTAL

ABC Company

Sign out

A Gonzalez

Account

Home

Job Approvals

File Upload

Manage Campaigns

Postage History

Inventory

Work Orders

Work Request

Permission Manager

My Users

Documentation

Reports

Configuration

Home > Manage Campaigns

Campaign Start Date

02/26/2025

Name

Status

Active X

Past X

Search

Reset

Add

Name	Status	Start Date	End Date
0 / 0			

8 Postage History

PORTAL

ABC Company

Sign out

A Gonzalez

Account

Home

Job Approvals

File Upload

Manage Campaigns

Postage History

Inventory

Work Orders

Work Request

Permission Manager

My Users

Documentation

Reports

Configuration

Home > Postage History

Postage

Date

01/27/2025 - 02/26/2025

Type

-- Select --

Search

View Letter Rates || View Flat Rates || View Foreign Rates

Current Balance: \$-747.02

Export to XLS

Post Date	Type	Amount	Starting Balance	Ending Balance
2/24/2025	Deduction - 983613	\$ 0.000	\$ -747.022	\$ -747.022
2/13/2025	Deduction - 979055	\$ 622.000	\$ -125.022	\$ -747.022

1 / 1

9 Inventory Manager

Inventory

PORTAL

ABC Company

Sign out

A Gonzalez

Account

Home

Job Approvals

File Upload

Manage Campaigns

Postage History

Inventory

Inventory

Purchase Request

Work Orders

Work Request

Permission Manager

My Users

Documentation

Reports

Configuration

Home > Inventory

Item Name

Location ID

Sacramento

Search

Reset

Item Number	Item Name	Current Number	Quantity on Hand	Estimated Days Remaining	Reorder Threshold	Artwork
ABC-123-ENV	Inventory Item Test	1904	6,000	0	6,000	

1 / 1

10 Purchase Request

PORTAL

ABC Company

Sign out

A Gonzalez

Account

Home

Job Approvals

File Upload

Manage Campaigns

Postage History

Inventory

Inventory

Purchase Request

Work Orders

Work Request

Permission Manager

My Users

Documentation

Reports

Configuration

Home > Purchase Request

Purchase Request #

Item #

Search

Reset

Create Purchase Request

PR History

PR Number	Items	Attachments	Due Date	Action
0 / 0				

11 Work Orders

PORTAL

ABC Company Sign out

A Gonzalez

Account

Home

Job Approvals

File Upload

Manage Campaigns

Postage History

Inventory

Work Orders

Work Request

Permission Manager

My Users

Documentation

Reports

Configuration

Home > Work Orders

Date

01/28/2025 - 02/26/2025

Search Date For

Create Date

Status

All

Work Order #

Work Order Name

Search

Reset

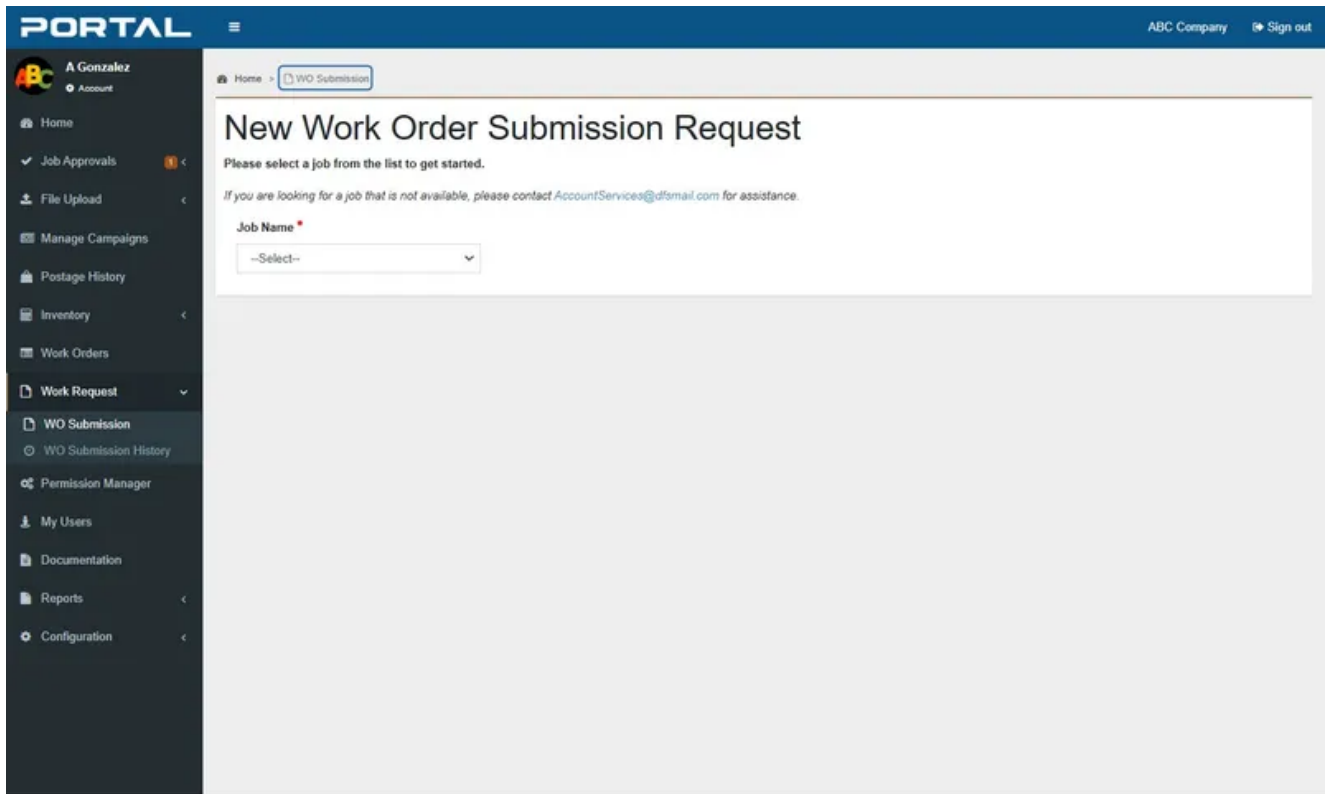
Export to XLS

Customer Name	Work Order #	Work Order Name	Create Date	Due Date	Piece Count	Image Count	Status	Printing	Inserting
ABC Company	976462	TEST JOB	2/6/2025 PST	2/10/2025 PST	100	500	Verified	100%	100%
ABC Company	979055	Daily Collection Letters	2/13/2025 PST	2/14/2025 PST	1,000	5,000	Verified	100%	100%
ABC Company	983613	Daily Collection Letters	2/24/2025 PST	2/26/2025 PST	100	200	Verified	100%	100%

1 / 1

12 Work Request

WO Submission



The screenshot shows the DFS Portal interface. The top navigation bar is blue with the word "PORTAL" on the left and "ABC Company" and "Sign out" on the right. A left sidebar contains a list of menu items: Home, Job Approvals, File Upload, Manage Campaigns, Postage History, Inventory, Work Orders, Work Request (expanded), WO Submission (selected), WO Submission History, Permission Manager, My Users, Documentation, Reports, and Configuration. The main content area has a breadcrumb trail "Home > WO Submission" and a title "New Work Order Submission Request". Below the title, it says "Please select a job from the list to get started." and provides a contact email "AccountServices@dfsmail.com" for assistance. A "Job Name" dropdown menu is currently set to "-Select-".

13 WO Submission History

PORTAL

ABC Company

Sign out

A Gonzalez

Account

Home

Job Approvals

File Upload

Manage Campaigns

Postage History

Inventory

Work Orders

Work Request

WO Submission

WO Submission History

Permission Manager

My Users

Documentation

Reports

Configuration

Home > WO Submission History

Date

01/28/2025 - 02/26/2025

Search Date For

Create Date

Submitter

--Select--

Status

All

CSO #

Cost Center #

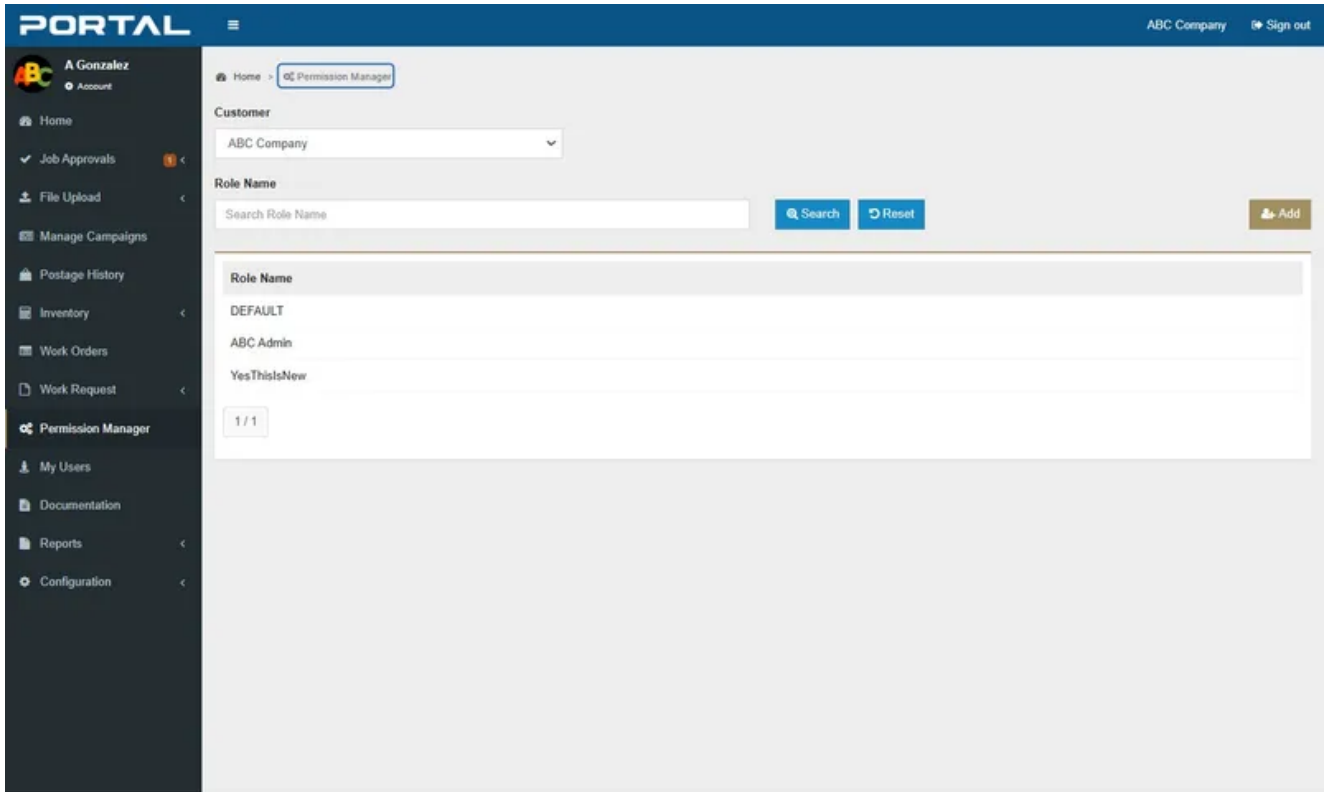
PO #

Search

Reset

WO #	Job Name	Create Date	Due Date	Attachments	Submitter	Status	Reason
972337	DRR - 1 Page Statements	1/28/2025	1/29/2025 PST	PickupPrintTraveler_972337_2025012810...	Operations DTECH	Approved on 1/29/2025 5:39 AM	
972385	Assessor Mail Services - Supplemental Notices	1/28/2025	1/30/2025 PST	PickupPrintTraveler_972385_2025012803...	Cynthia Arnold	Approved on 1/30/2025 6:29 AM	
972810	DRR - 1 Page Letters	1/29/2025	1/30/2025 PST	PickupPrintTraveler_972810_2025012909...	carlos velasquez	Approved on 1/31/2025 2:27 PM	
972813	DRR - 1 Page Statements	1/29/2025	1/30/2025 PST	PickupPrintTraveler_972813_2025012909...	carlos velasquez	Approved on 1/30/2025 5:50 AM	
972866	General Business Licenses	1/29/2025	1/31/2025 PST	PickupPrintTraveler_972866_2025012902...	Lisa Berkenpas	Approved on 1/31/2025 2:29 PM	
973266	Human Assistance - Month End Warrants	1/30/2025	1/31/2025 PST	- PickupPrintTraveler_973266_2025013008... 2_2025 FME Warrant Work Order.docx	Breanna Louangsarath	Approved on 1/31/2025 2:30 PM	
973286	Assessor Mail Services - Weekly HEX Mailing	1/30/2025	1/31/2025 PST	PickupPrintTraveler_973286_2025013009...	Aracely Vazquez	Approved on 2/3/2025 6:03 AM	
973289	DRR - 1 Page Letters	1/30/2025	1/31/2025	PickupPrintTraveler_973289_2025013009...	carlos velasquez	Approved on 1/31/2025	

14 Permission Manager



The screenshot displays the 'Permission Manager' interface within the DFS Portal. The top navigation bar includes the 'PORTAL' logo, a user profile for 'A Gonzalez', and the company name 'ABC Company' with a 'Sign out' link. The left sidebar contains a menu with options: Home, Job Approvals, File Upload, Manage Campaigns, Postage History, Inventory, Work Orders, Work Request, Permission Manager (highlighted), My Users, Documentation, Reports, and Configuration. The main content area shows the 'Permission Manager' page for 'ABC Company'. It features a 'Customer' dropdown menu set to 'ABC Company', a 'Role Name' search input field, and 'Search' and 'Reset' buttons. Below the search field, a table lists roles: 'DEFAULT', 'ABC Admin', and 'YesThisIsNew'. A pagination control shows '1 / 1'. An 'Add' button is located in the top right corner of the table area.

Role Name
DEFAULT
ABC Admin
YesThisIsNew

15 My Users

PORTAL

ABC Company

Sign out

A Gonzalez

Account

Home

Job Approvals

File Upload

Manage Campaigns

Postage History

Inventory

Work Orders

Work Request

Permission Manager

My Users

Documentation

Reports

Configuration

Home > My Users

User Name

Active

No

Search

Reset

Add

Email	First Name	Last Name	Last Session
lyleblue3@gmail.com	Lyle	Blue	2/6/2024 1:23:17 PM

1 / 1

Back

16 Documentation

PORTAL

ABC Company

Sign out

A Gonzalez

Account

Home

Job Approvals

File Upload

Manage Campaigns

Postage History

Inventory

Work Orders

Work Request

Permission Manager

My Users

Documentation

Reports

Configuration

Home > Documentation

Title

Document Type

-- Select --

Search

Reset

Date Uploaded	Last Reviewed Date	Title	Effective Date	Document Type	Files
9/19/2023	11/8/2024	DFS SOC 2 Type II - Final Report	9/19/2023	SOC Audit Documents	DFS - 2024 SOC 2 Type II - Final Report.pdf

1 / 1

17 Reports

Postage Usage by Date

PORTAL

ABC Company

Sign out

A Gonzalez

Account

Home

Job Approvals

File Upload

Manage Campaigns

Postage History

Inventory

Work Orders

Work Request

Permission Manager

My Users

Documentation

Reports

Postage Usage by Date

Work Order Details by Date

Inventory Usage by Date

Entitlement Report

Configuration

Home > Reports

Postage Usage by Date

Report Parameters

Format

PDF

Date

01/26/2025 - 02/26/2025

Search Date for

Create Date

Download

18 Work Order Details by Date

PORTAL

ABC Company

Sign out

A Gonzalez

Account

Home

Job Approvals

File Upload

Manage Campaigns

Postage History

Inventory

Work Orders

Work Request

Permission Manager

My Users

Documentation

Reports

Postage Usage by Date

Work Order Details by Date

Inventory Usage by Date

Entitlement Report

Configuration

Home > Reports

Work Order Details by Date

Report Parameters

Format

PDF

Date

01/26/2025 - 02/26/2025

Search Date for

Create Date

Download

19 Inventory Usage by Date

PORTAL

ABC Company

Sign out

A Gonzalez

Account

Home

Job Approvals

File Upload

Manage Campaigns

Postage History

Inventory

Work Orders

Work Request

Permission Manager

My Users

Documentation

Reports

Postage Usage by Date

Work Order Details by Date

Inventory Usage by Date

Entitlement Report

Configuration

Home > Reports

Inventory Usage by Date

Report Parameters

Format

PDF

Date

01/26/2025 - 02/26/2025

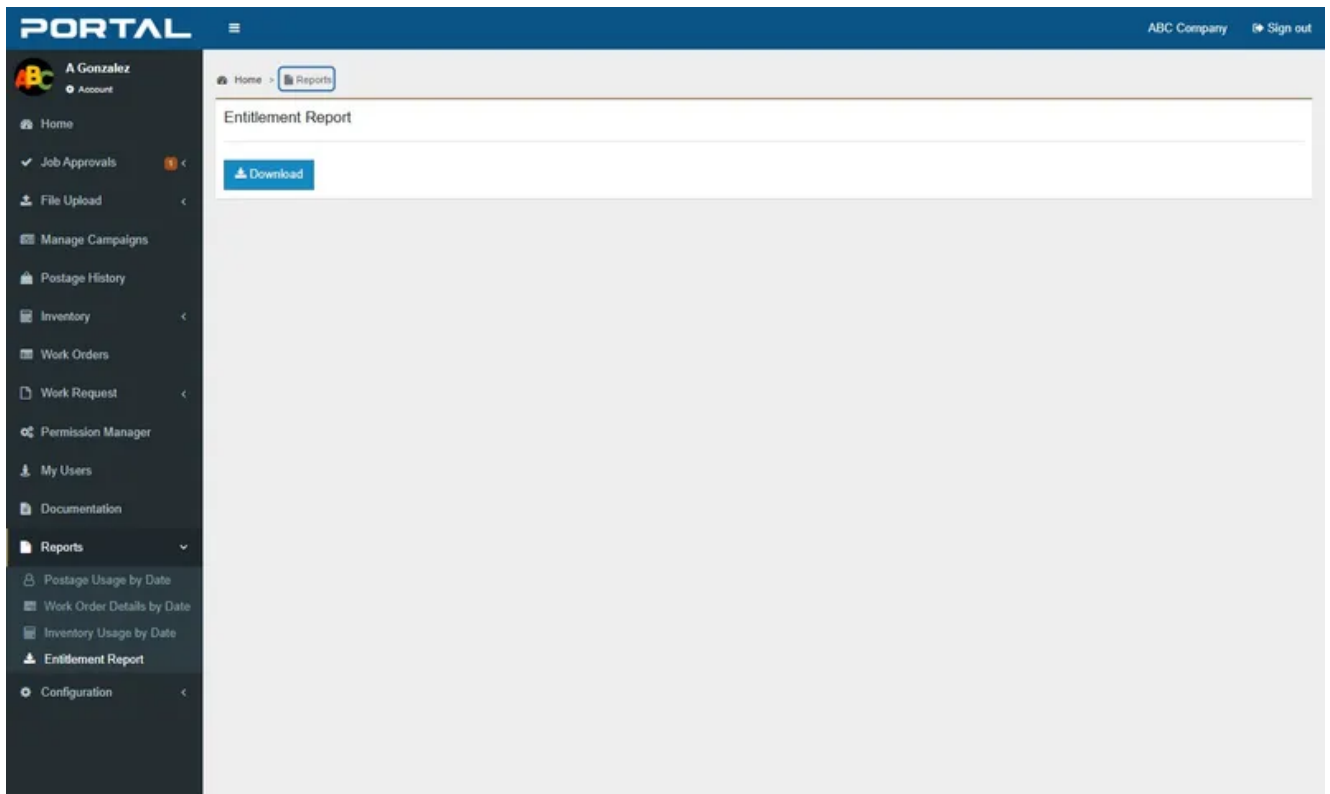
Search Date for

Create Date

☐ Display Items by Job

Download

20 Entitlement Report



21 Configuration

Notification Settings

PORTAL

ABC Company Sign out

A Gonzalez

Account

Home

Job Approvals

File Upload

Manage Campaigns

Postage History

Inventory

Work Orders

Work Request

Permission Manager

My Users

Documentation

Reports

Configuration

Notification Settings

Holiday Calendar

Home > Notification Settings

Notification Method

Email

Subscribe

☒ System Notifications
 ☒ DFS Product News

For the following conditions, receive Work Order Updates when work order is:

☐ Created
 ☐ Pending approval
 ☐ Pending approval, and is approaching approval deadline

☐ Being fulfilled in production
 ☐ Completed
 ☐ Send notifications to group mailbox

For the following conditions, receive purchase request updates when your receiver is:

☐ Pending delivery
 ☐ A partial order has been received
 ☐ The full order has been received

☐ Send notifications to group mailbox

For the following conditions, receive low postage balance updates when your balance is:

☐ Equal to or below your postage threshold
 ☐ Send notifications to group mailbox

For the following conditions, receive inventory reorder updates when your balance is:

☐ Equal to or below your reorder level, per location
 ☐ Send notifications to group mailbox

☒ Edit

22 Holiday Calendar

PORTAL

ABC Company Sign out

A Gonzalez Account

Home
Job Approvals
File Upload
Manage Campaigns
Postage History
Inventory
Work Orders
Work Request
Permission Manager
My Users
Documentation
Reports
Configuration
Notification Settings
Holiday Calendar

Home > Holiday Calendar

Calendar Holidays List

Month: February
Year: 2025

February 2025

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17 President's Day	18	19	20	21	22
23	24	25	26	27	28	1
2	3	4	5	6	7	8

9.4. Portal Security Options

Introduction

Welcome to the Portal Security Permissions Guide! This section will help you understand and configure the security options available in the DFS Customer Portal. These features are designed to give you control over who can access your portal and how they log in, keeping your data safe and secure.

What is the Purpose of Security Options?

The purpose of Security Options is to provide flexible tools for customers to manage user access. These settings allow you to restrict logins by network, enforce authentication standards, and apply password requirements specific to your organization.

✓ Who is This Guide For?

This guide is intended for Portal Administrators and any customer responsible for setting up or managing user access within their company. If you are not currently set up as an Administrator but need these permissions, please contact Account Services.

✓ How to Use This Guide?

This guide provides an overview of the security features available in the Portal. Each section explains the purpose of a specific option and how it can be applied within your organization.

Use this guide to:

- Understand what each security option does.
- Determine which settings best support your company's security requirements.
- Share with your internal IT or security team to decide which features to enable.
- Contact Account Services for setup or additional details when needed.

The goal of this guide is to give you clarity on what options are available so you can make informed decisions about your organization's Portal security.



✓ Available Options

IP Address Restrictions

- Restrict portal access by **single IP address**, **range of IP addresses**, or a combination of both.
- This ensures that only approved networks can connect to the Portal.

Domain Mask

- Limit user account creation to specific email domains.
- Example: only users with @yourcompany.com can register.

Multifactor Authentication (MFA)

- Require users to verify their login with a second step in addition to username and password.
- A one-time code or PIN is sent to the user to confirm identity.

Authentication App

- Support for common authentication apps such as Google Authenticator or Microsoft Authenticator.
- Works alongside MFA for enhanced security.

Password Requirements

- Apply customer-specific password policies. Options may include:
 - Minimum length
 - Character complexity (uppercase, lowercase, numbers, symbols)
 - Password expiration intervals
 - Restrictions on reusing old passwords

Site Name abccompany	Customer Number 11000	IP Access Restriction 99.999.999.99 1.99.999.999.999.11.111.111.111
Domain Mask @abccompany.com	User Credentials Restriction User ID x Email Address x	Force multi-factor authentication Yes
Authentication App Yes	Send Entitlement Report Yes	Frequency Monthly

Password Requirements

Password must contain a minimum of 8 characters.

Password must have at least 1 lowercase character ('a'-'z').

Password expires after 0 days.

☒ Use DFS password requirements default

Password must have at least 1 non letter or digit character.

Password must have at least 1 uppercase character ('A'-'Z').

Cannot reuse the last 0 passwords, including the current password.

Create a Support Ticket

If you need further assistance, send a ticket into our system by using the button below.

Email Account Services

▼ **Revision History**

Version Date	Updater Name	Description
August 29, 2025	Nikkita	Initial draft

9.5. SFTP & Data Transfer

Introduction

Welcome to the SFTP Guide! This guide is designated to help you navigate initiating a SFTP session with ease for a seamless experience.

What is the SFTP?

SFTP (Secure File Transfer Protocol) is a way to safely send and receive files over the internet. Think of it like sending a package through a secure courier instead of regular mail.

- **Secure:** It locks your files with encryption, so no one can peek at them while they travel.
- **Like a Safe Deposit Box:** You need a key (password or special code) to access the files.
- **Reliable:** It ensures files arrive complete without being damaged or altered.
- **Used for Important Transfers:** Businesses use it for sensitive data, like financial records or personal information.

So, if regular **file transfer** is like sending a postcard, **SFTP** is like using a locked, tamper-proof package!

✓ Who is This Guide For?

This guide is for any customer who wants to use SFTP to:

- Transfer files for testing and/or work order submissions.
 - Receive return files.
 - Receive reports and samples.
-

✓ How to Use This Guide?

Whether you are tech savvy or a technical novice, this guide will walk you through:

- Downloading and installing a SFTP Client.
- Initiating a SFTP session.
- Uploading and Downloading files.

We're always looking to improve, so if this guide doesn't answer all of your questions, please let us know.

Getting Started

First things first, you will need a SFTP client.

An **SFTP Client** is a software application that allows you to securely connect to an SFTP server to transfer files. Think of it as a **special mailbox** that lets you send and receive files safely over the internet.

How It Works (Simple Explanation)

- You **open** the SFTP client.
- You **log in** using a **username and password** (or a special key).
- You can **upload** (send) or **download** (receive) files.
- Your files travel **securely** so no one else can see or change them.

Example Uses

- A company shares confidential documents with employees.
- A website owner uploads files to a server.
- A business backs up important data to a secure location.

Popular SFTP Clients

- [WinSCP](#) (Windows-friendly)
- [FileZilla](#) (Easy to use)

So, an **SFTP Client** is like a **secure file mover** that helps you safely transfer important files between your computer and a remote server. 🚀

This guide will walk through the use of WinSCP but the steps are similar for most clients.

WinSCP

✓ Download WinSCP Client

We recommend [WinSCP](#) or [Filezilla](#). We will use WinSCP for this guide. If you are using an operating system other than Windows then Filezilla or another client will be a better choice for you.

After clicking the link for WinSCP, you will look for the following to start downloading the software

DOWNLOAD WINSCP 6.3.7 (11 MB)

1,147,135 downloads since 2025-02-20



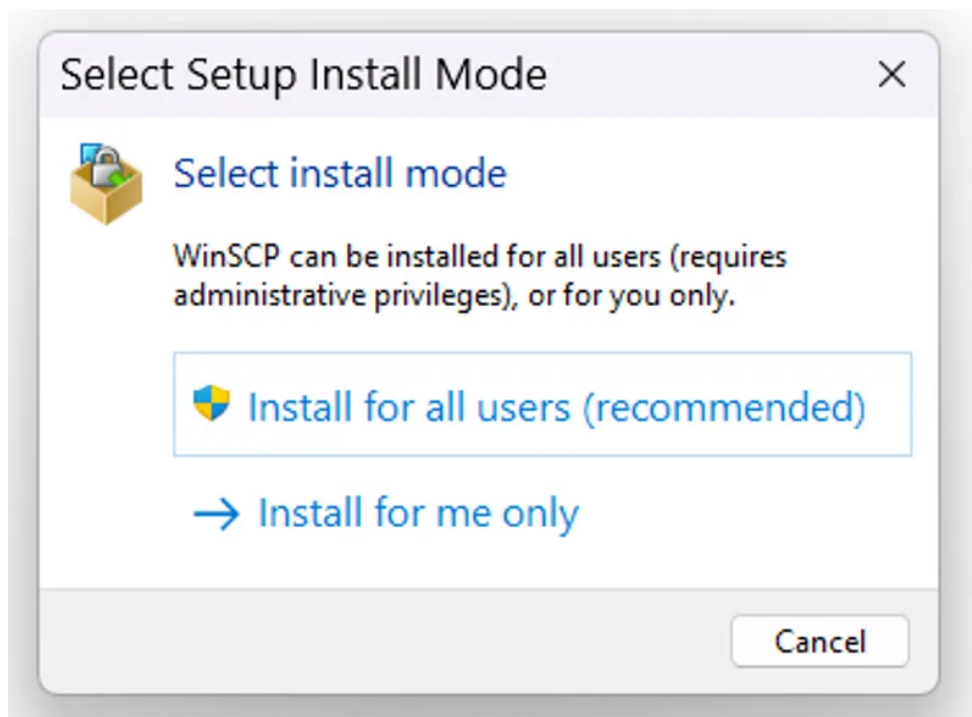
Get it from
Microsoft

What is this?

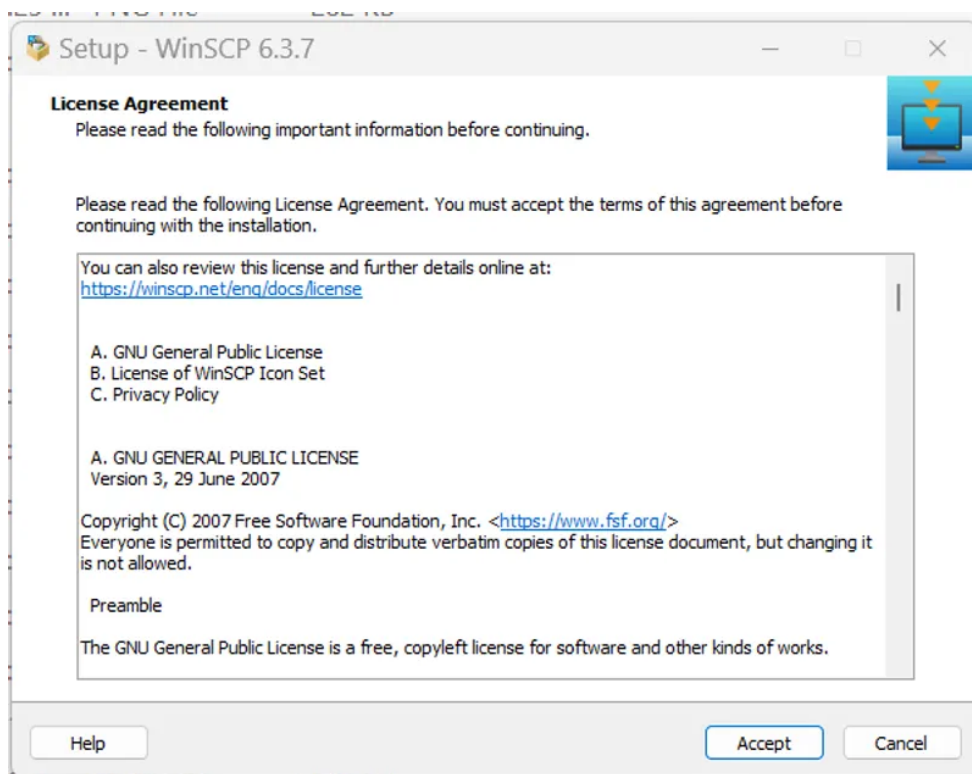
OTHER DOWNLOADS

✓ Install WinSCP Client

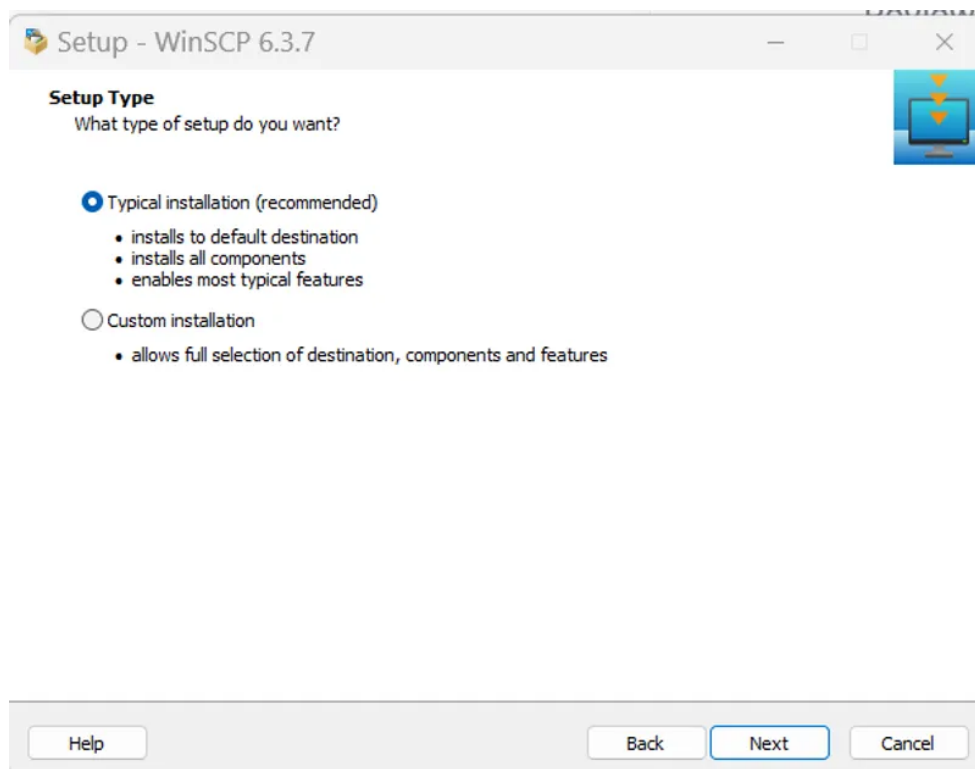
1. Double click the file that was downloaded.
2. A window will popup requesting you to select an Install Mode. We will be choosing "Install for all users (recommended)"



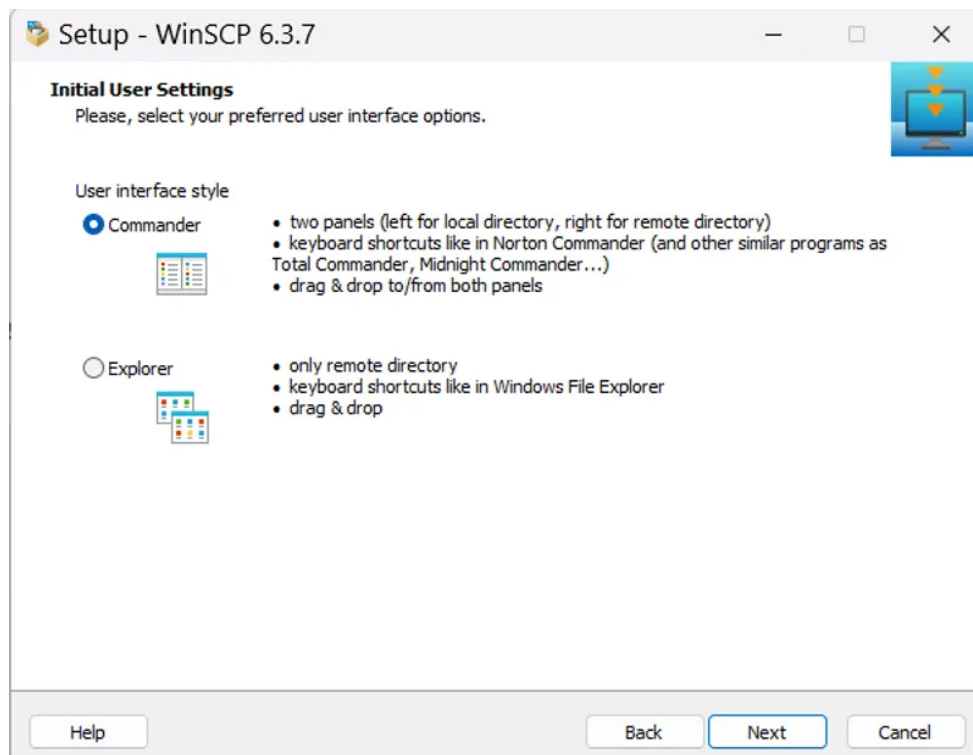
3. When prompted: "Do you want to allow this app to make changes to your device?" Select "Yes"
4. The next screen will be the License Agreement. Choose "Accept" to continue with the software install.



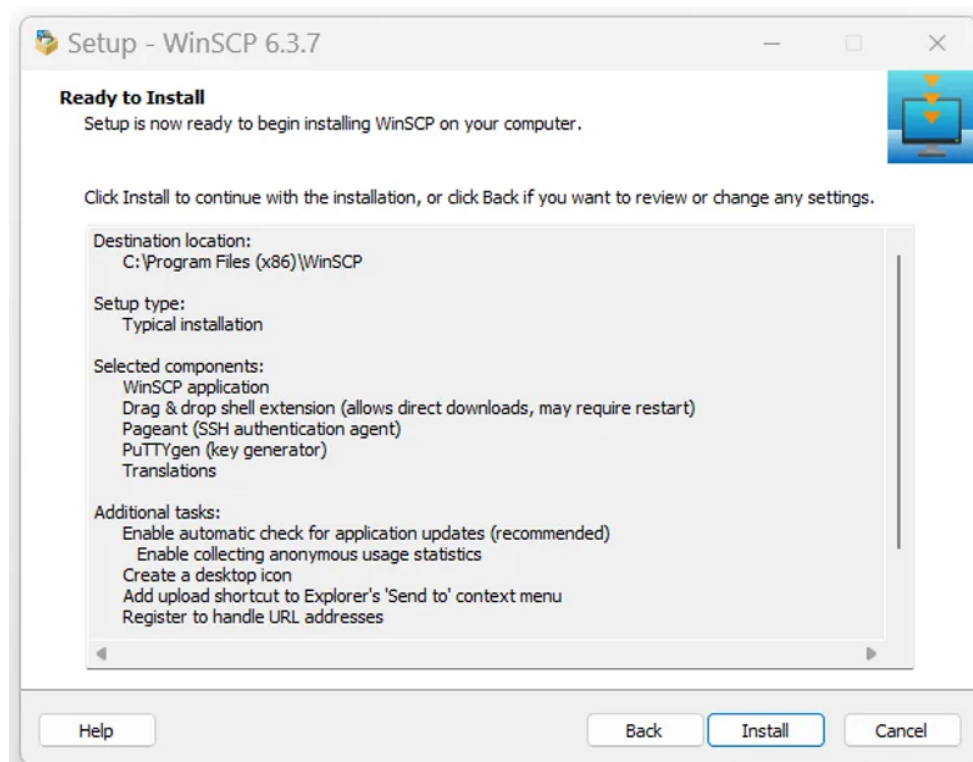
5. The next window asks which "Setup Type" you want. Select "Typical installation (recommended)" and click "Next".



6. For the "Initial User Settings" we suggest selecting "Commander" for use with this guide. Then click "Next".



7. Finally, we're ready to install. Click "Install".



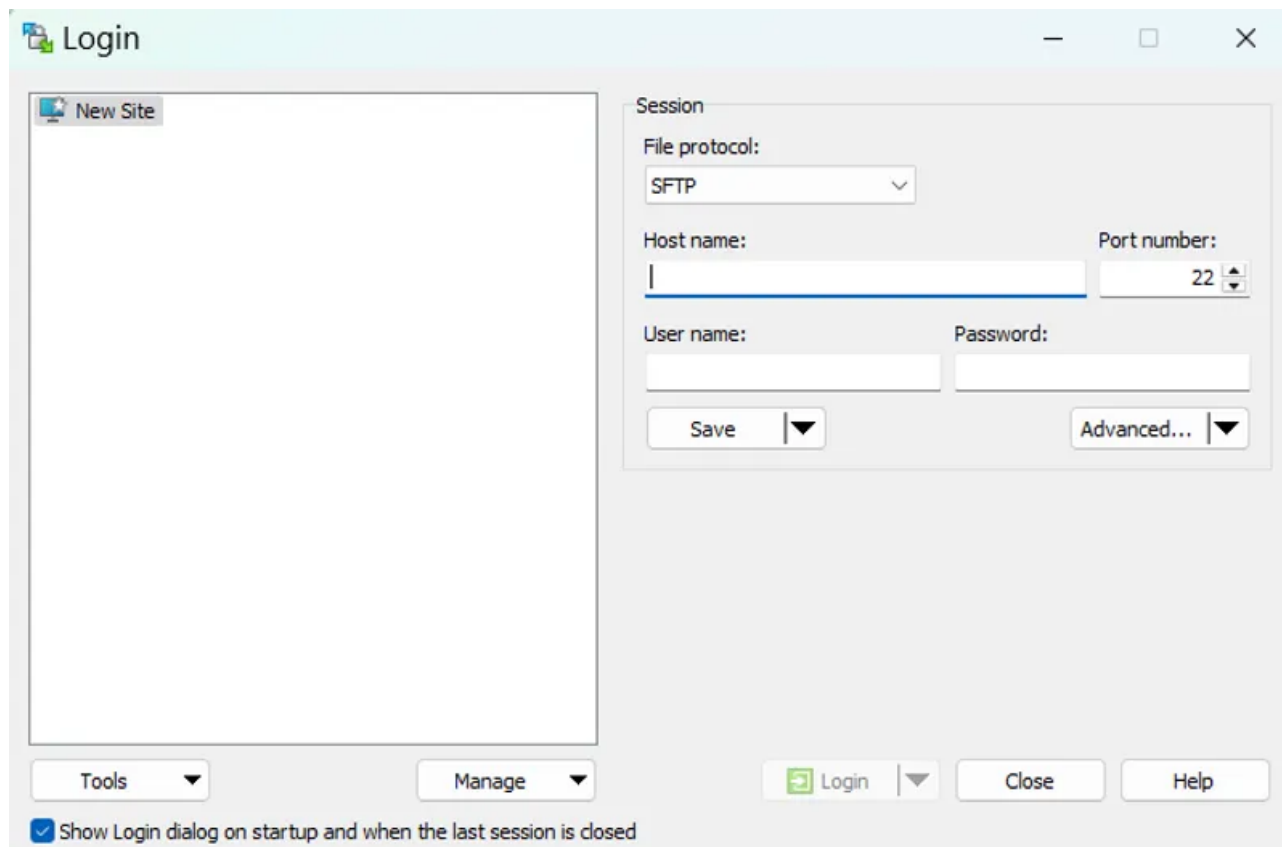
8. We have now completed the installation of WinSCP. If you leave the "Open Getting started page" option selected, when you click finished you will be taken to a webpage with detailed information for using WinSCP. We will provide basic instructions in this guide.

✓ Logging In with WinSCP

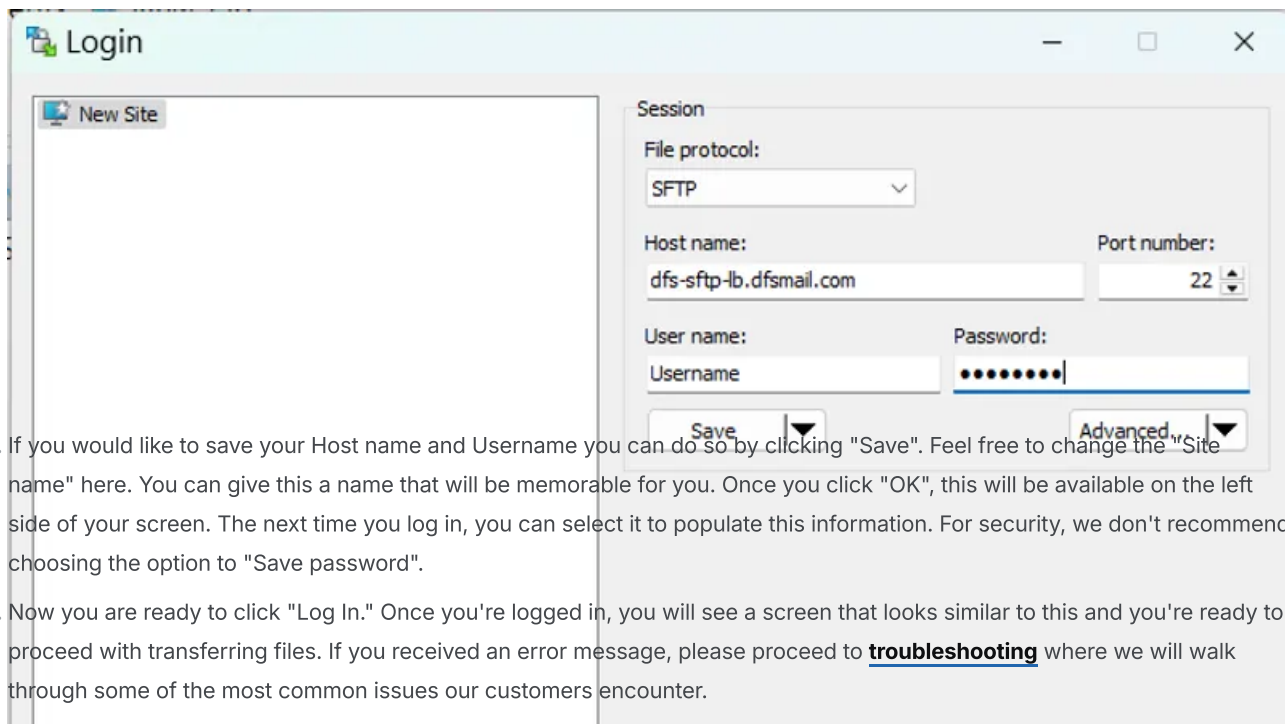
Now that you have the SFTP Client installed, you are ready to use your username and password to log in. If you don't already have an account set up, you will need to complete the [DFS SFTP Account Request Form](#) before going any further.

Username and Password

1. When you open the WinSCP application you will see the following login screen:



2. The SFTP Host Name for DFS is: `dfs-sftp-lb.dfsmail.com`. Always use Port number: 22 and enter your assigned Username and Password.



Login

New Site

Session

File protocol: SFTP

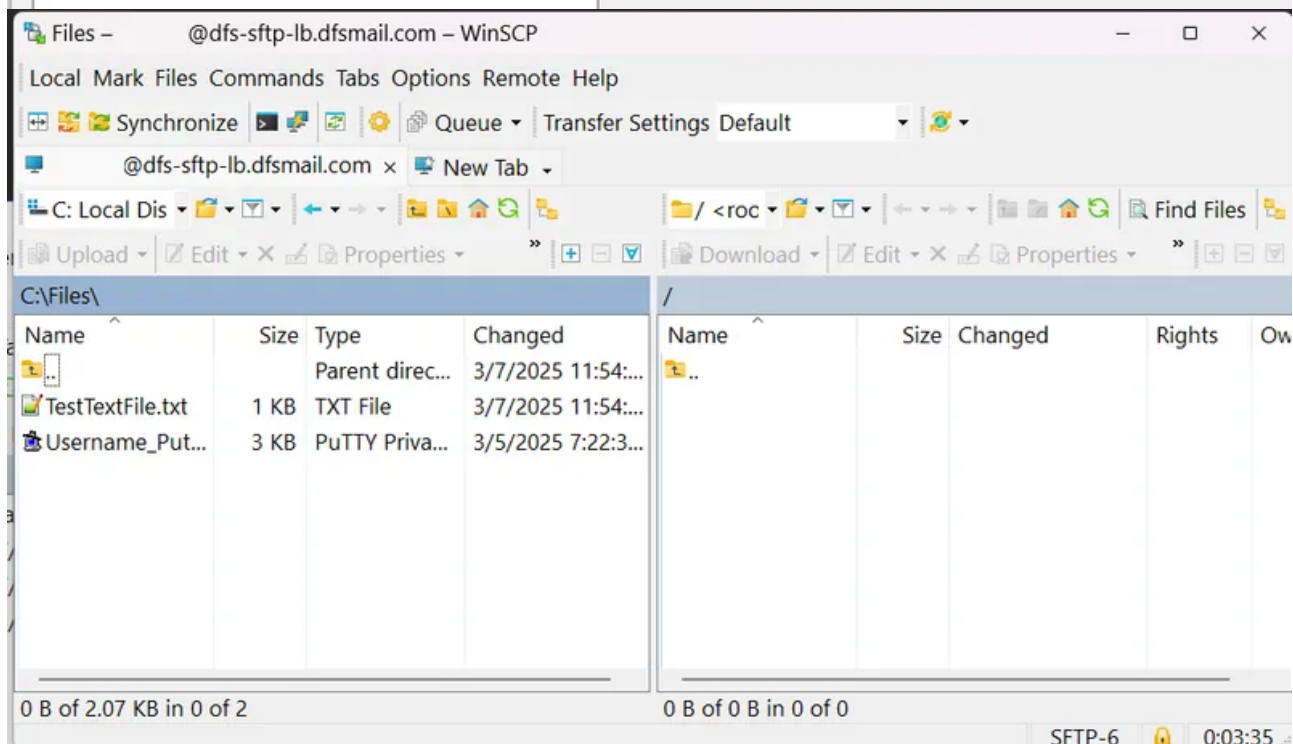
Host name: dfs-sftp-lb.dfsmail.com Port number: 22

User name: Username Password:

Save Advanced

3. If you would like to save your Host name and Username you can do so by clicking "Save". Feel free to change the "Site name" here. You can give this a name that will be memorable for you. Once you click "OK", this will be available on the left side of your screen. The next time you log in, you can select it to populate this information. For security, we don't recommend choosing the option to "Save password".

4. Now you are ready to click "Log In." Once you're logged in, you will see a screen that looks similar to this and you're ready to proceed with transferring files. If you received an error message, please proceed to [troubleshooting](#) where we will walk through some of the most common issues our customers encounter.



Files – @dfs-sftp-lb.dfsmail.com – WinSCP

Local Mark Files Commands Tabs Options Remote Help

Synchronize Queue Transfer Settings Default

@dfs-sftp-lb.dfsmail.com x New Tab

C: Local Dis / <roc Find Files

Upload Edit Properties Download Edit Properties

Name	Size	Type	Changed
..		Parent direc...	3/7/2025 11:54:...
TestTextFile.txt	1 KB	TXT File	3/7/2025 11:54:...
Username_Put...	3 KB	PuTTY Priva...	3/5/2025 7:22:3...

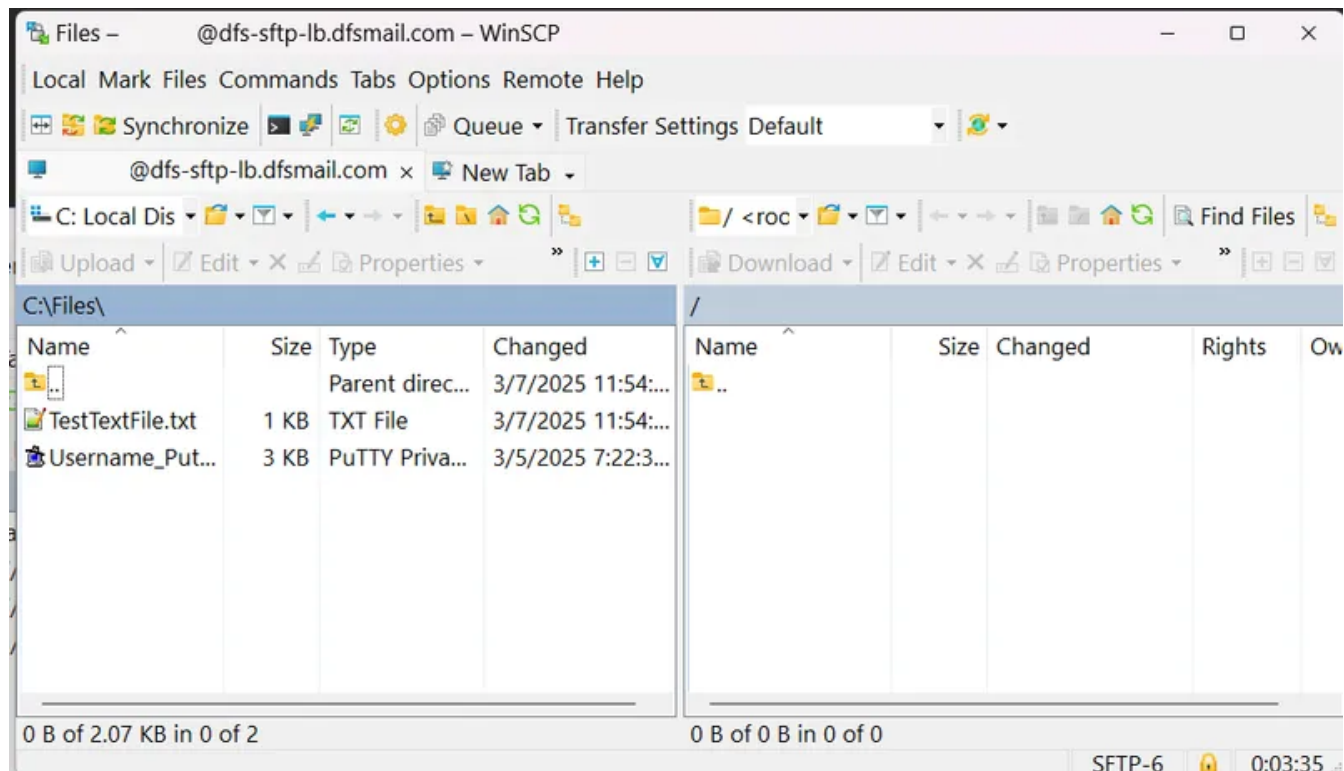
Name	Size	Changed	Rights	Ow
..				

0 B of 2.07 KB in 0 of 2 0 B of 0 B in 0 of 0 SFTP-6 0:03:35

✓ Transferring files with WinSCP

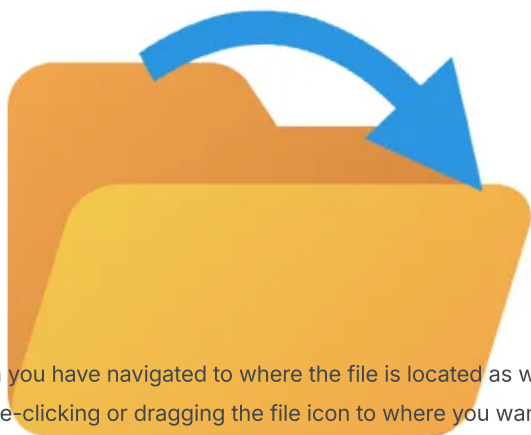
Let's start by familiarizing ourselves with the screen. As you can see, the bulk of the application screen is split in half. On the left you will see a folder location on your computer. The right shows the folders and files on the SFTP server.

In this example, there are 2 files on the computer used to log in to SFTP and there isn't anything in the SFTP directory.



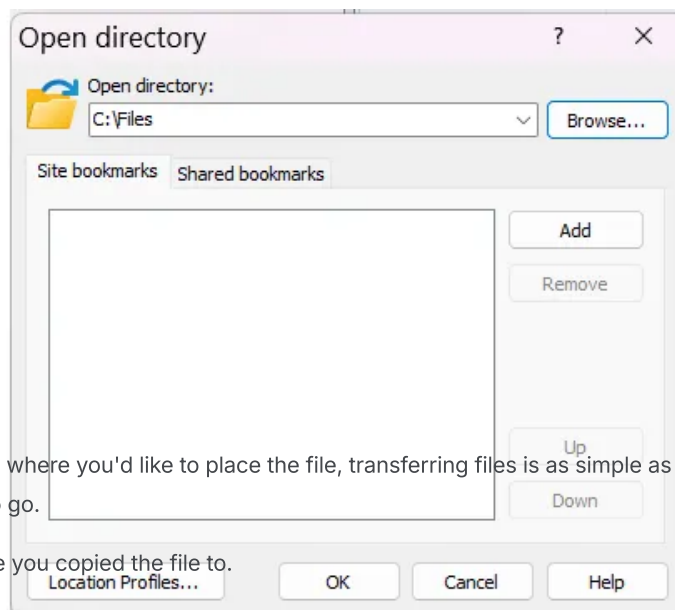
The first thing we are going to do is navigate to the location of the file we want to move and, in the opposite pane, we will navigate where we'd like to place the file. Remember, the left side is your computer and the right side is the SFTP directory.

If you are having difficulty using the interface to navigate to a file location, try clicking the "Open Directory" icon on the pane where you are trying to navigate and clicking Browse. This interface may be more familiar.

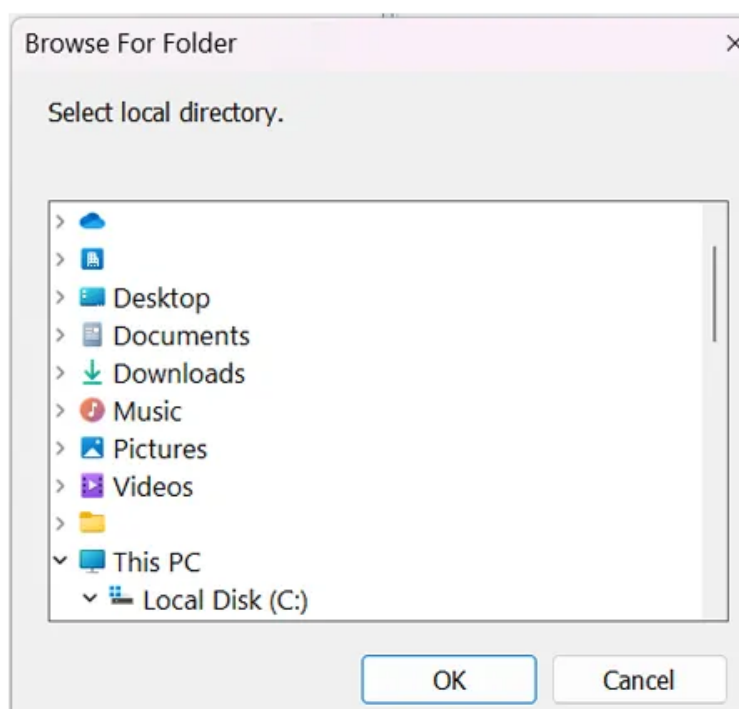


When you have navigated to where the file is located as well as where you'd like to place the file, transferring files is as simple as double-clicking or dragging the file icon to where you want it to go.

When the file is copied, you will see it appear in the pane where you copied the file to.



FileZilla



✓ Download FileZilla Client

We recommend [WinSCP](#) or [Filezilla](#). We will use Filezilla for this portion of the guide. If you are using an operating system other than Windows then Filezilla or another client will be the better choice for you.

After clicking the link for Filezilla, you will click the green "Download FileZilla Client" button if you have a Windows PC. If you are using a different operating system, click the link below where it says "More download options".

Download FileZilla Client for Windows (64bit x86)

The latest stable version of FileZilla Client is 3.68.1

Please select the file appropriate for your platform below.

Windows (64bit x86)

**Download
FileZilla Client**

This installer may include bundled offers. Check below for more options.

The 64bit versions of Windows 10 and 11 are supported.

More download options

Other platforms:    

Not what you are looking for?

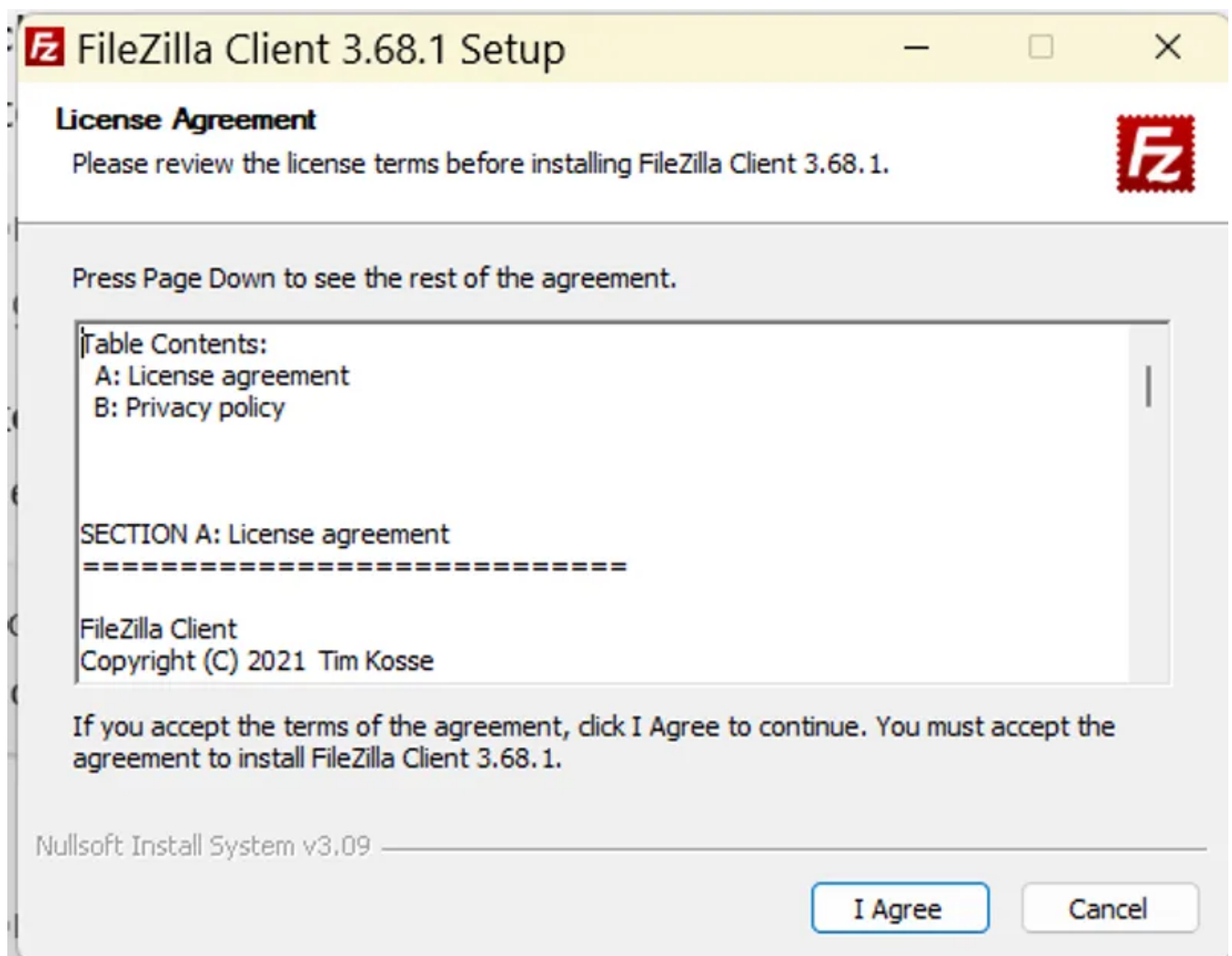
[Show additional download options](#)

Next you will select your edition. For this tutorial we selected the first option which is the FileZilla free version.

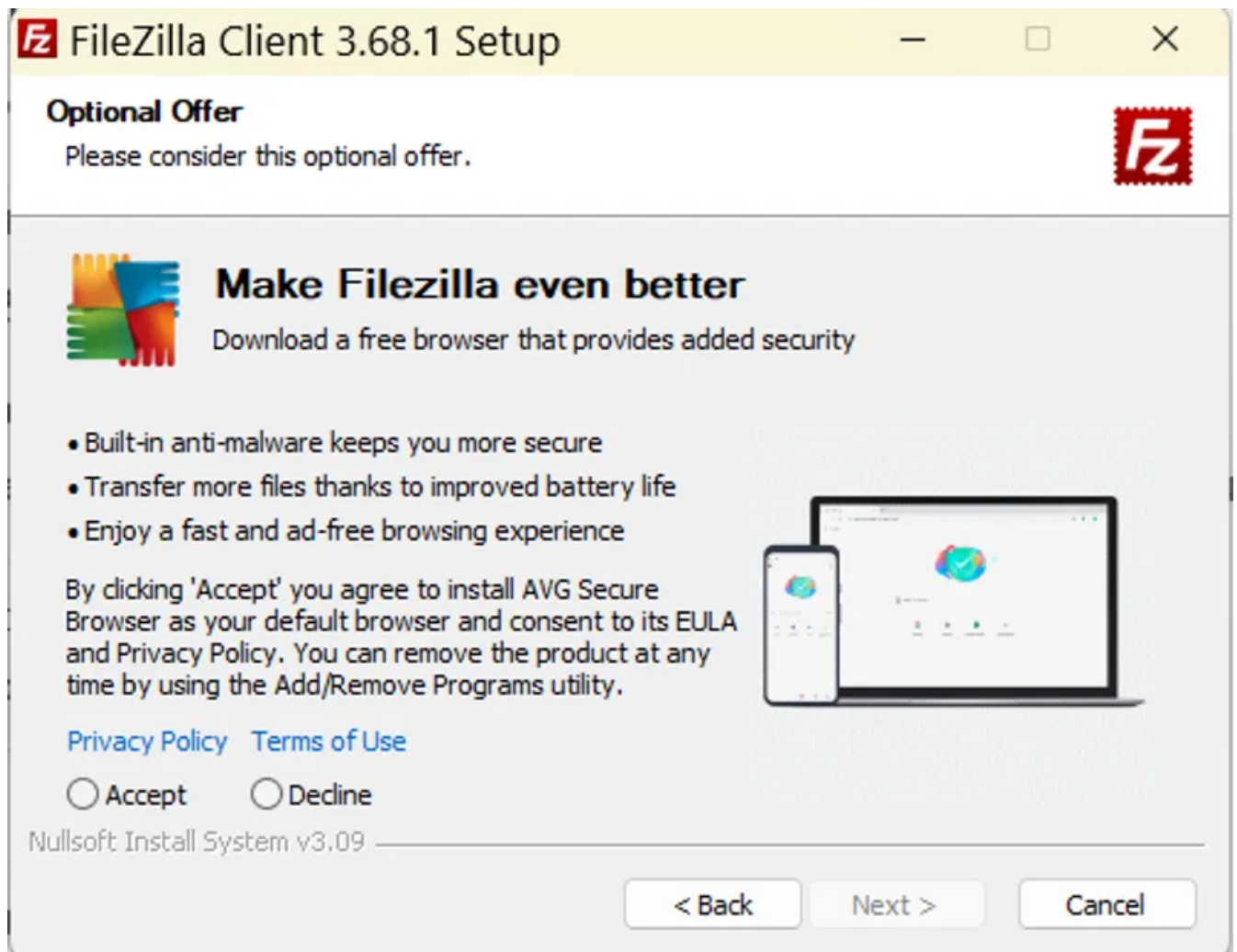
FileZilla Client: Select your edition

	FileZilla	FileZilla Bundle Includes FileZilla and FileZilla CLI	FileZilla Pro	FileZilla Pro Bundle Includes FileZilla Pro and FileZilla Pro CLI
FTP/FTPS/SFTP	✓	✓	✓	✓
Detailed Manual	X	✓	✓	✓
Batch Automation	X	✓	X	✓
<u>Multi-cloud Support</u>	X	X	✓	✓
Synchronization	X	X	✓	✓
	Download	Purchase	Purchase	Purchase

Next you will need to agree to the license agreement.

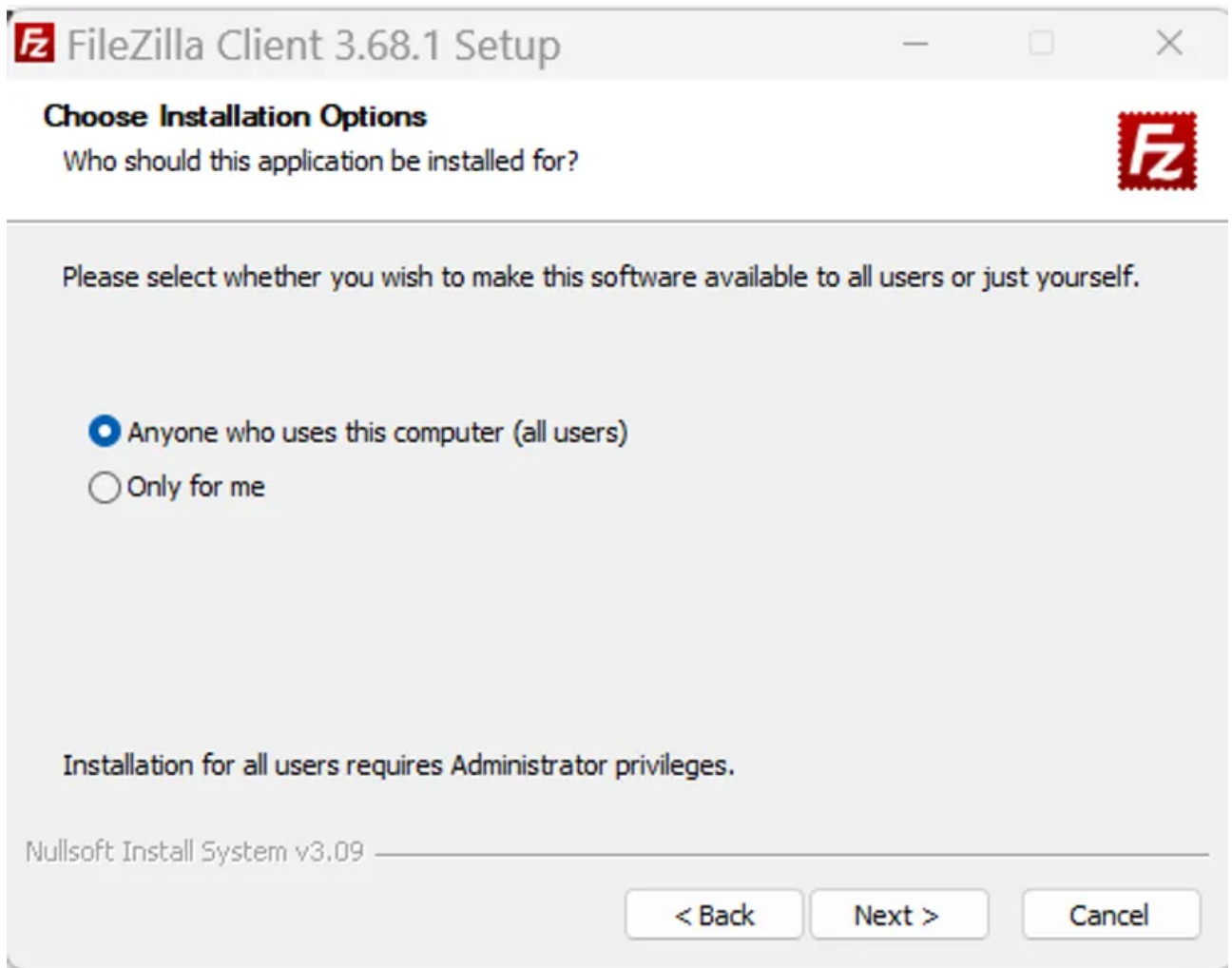


You will be presented with an additional offer. This is not necessary so you can select "Decline" and click next.

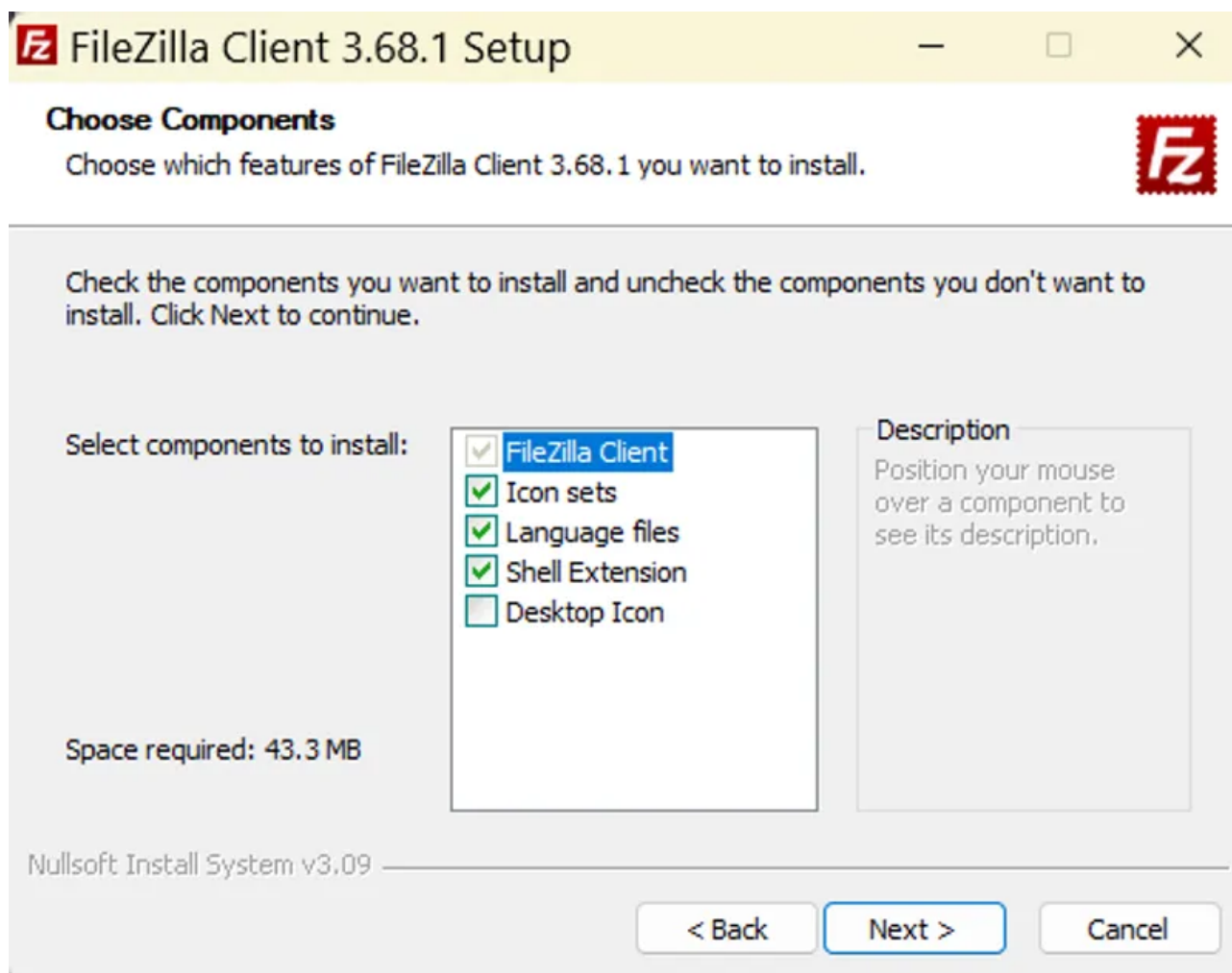


✓ Install FileZilla Client

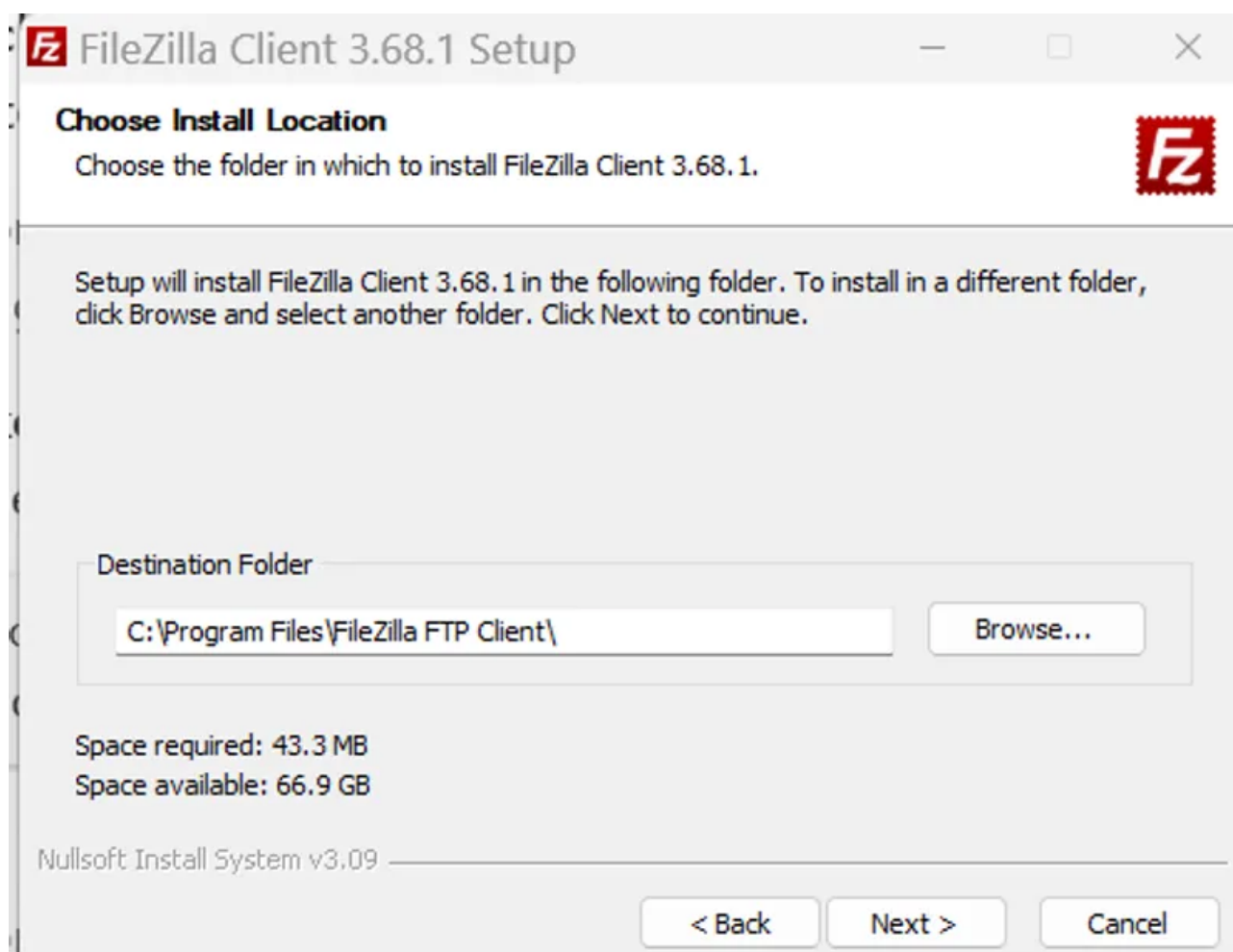
1. Double click the file that was downloaded.
2. A window will popup will install options. With this tutorial we selected the first option "Anyone who uses this computer (all users)"



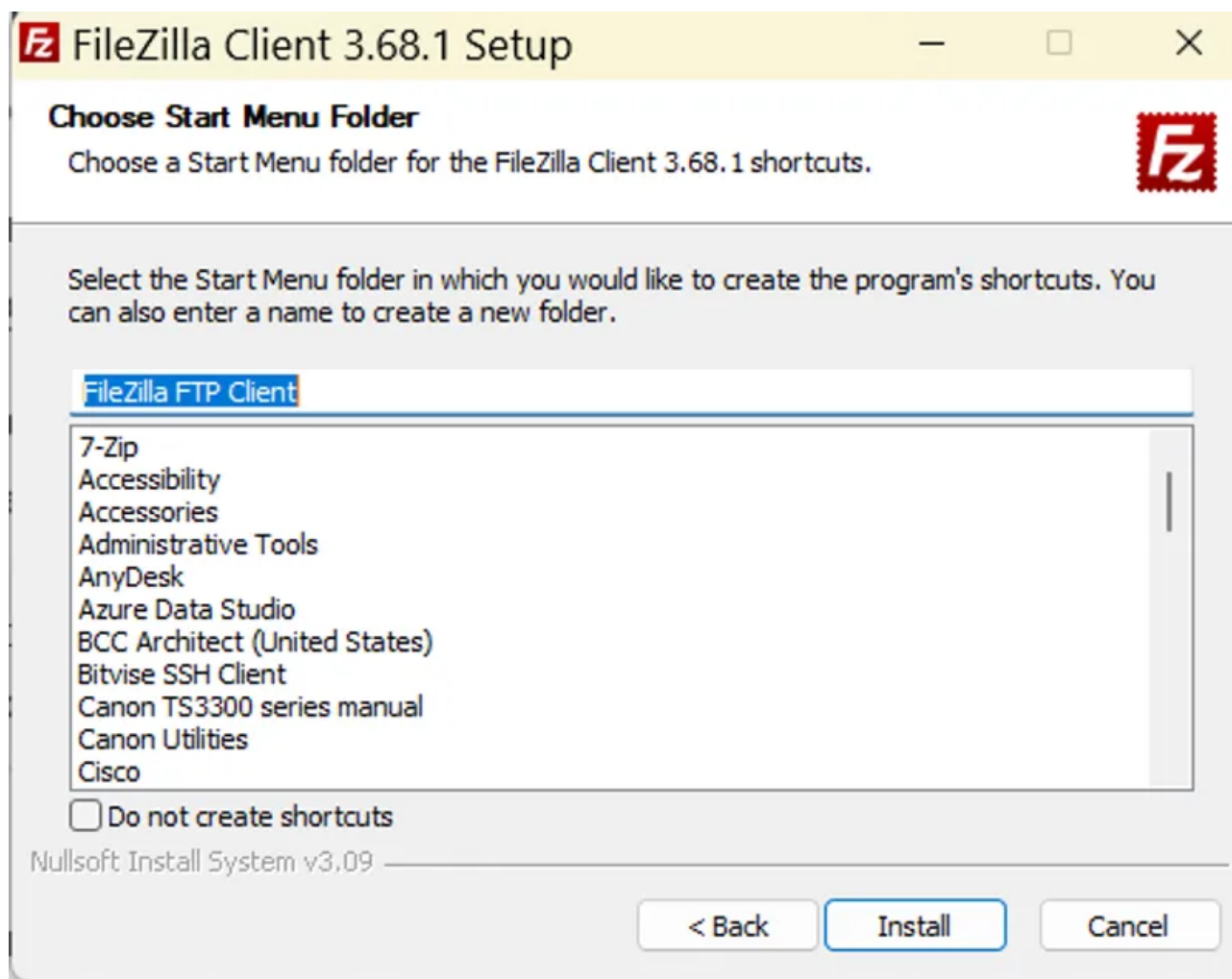
3. Next you will be prompted to choose components. Choose the ones that make sense for you and your organization.



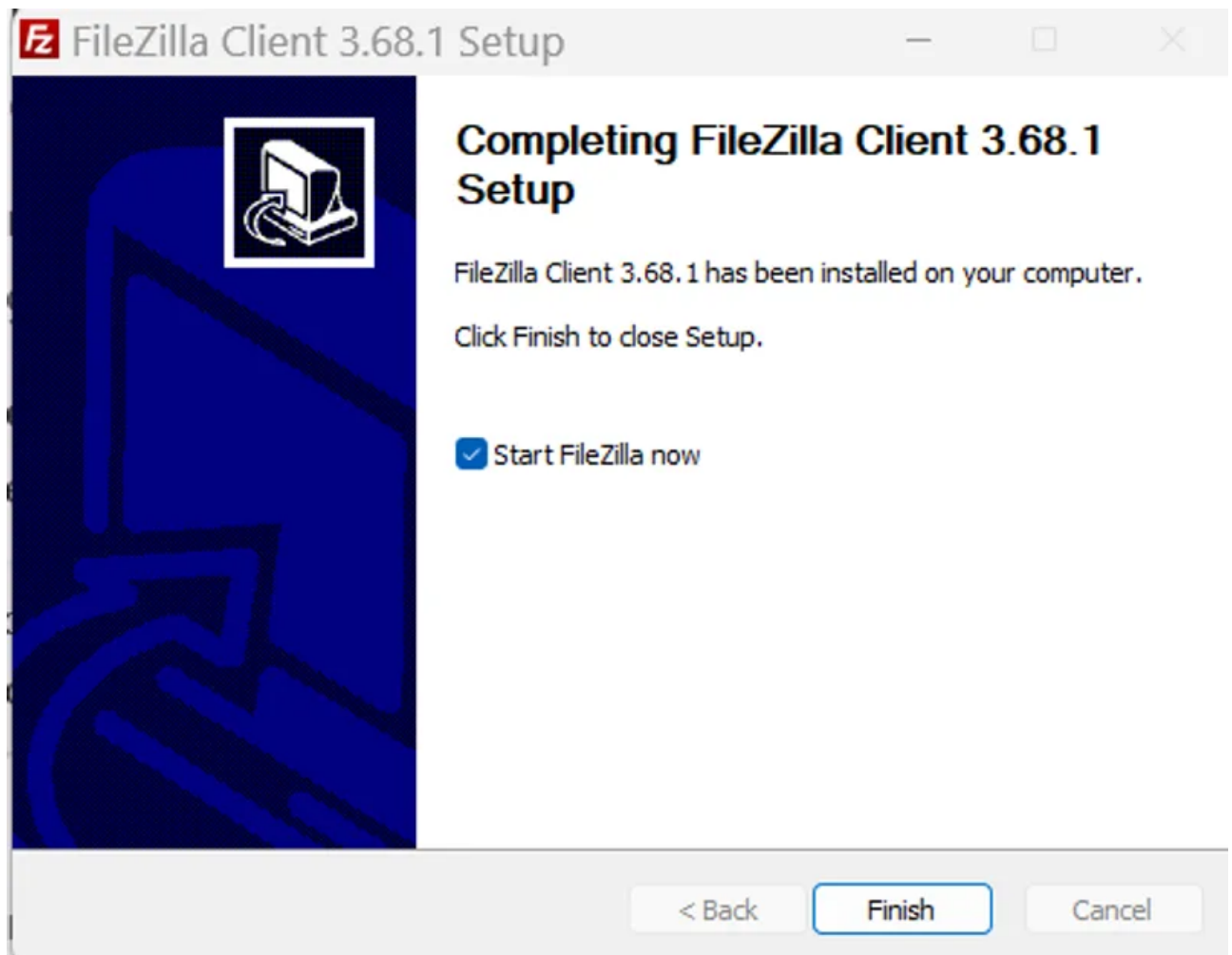
4. Your next window will request your install location. We used the default location.



5. The next window will ask you to choose the Start Menu Folder. We kept the default suggestion.



6. Once you have reached this window, click "Complete" and you will have completed the installation of FileZilla



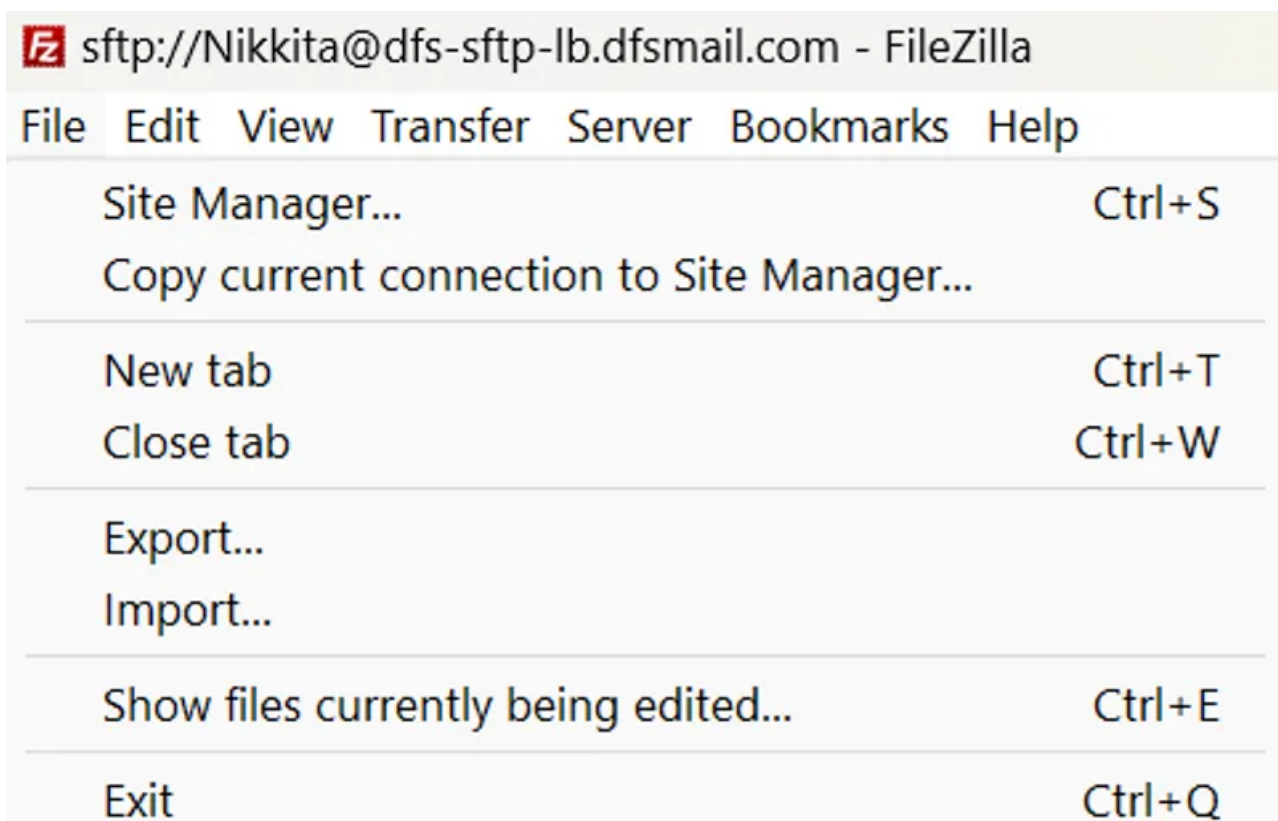
✓ Logging In with FileZilla

Now that you have the SFTP Client installed, you are ready to use your username and password and/or key to log in. If you don't already have an account set up, you will need to complete the [DFS SFTP Account Request Form](#) before going any further.

1. When you open the FileZilla application you will see the following a place for login information. If you are logging in using a password and don't have a need to save the host information then Quickconnect may be a good option for you. Enter dfs-sftp-lb.dfsmail.com for your Host along with your username, password and the Port number of 22. Then click Quickconnect.



2. If you plan to log in regularly and wish to save the Hostname and Port Number, the following option will be a better option for you. Select File and navigate down to Site Manager.



3. Next, click "New site" at the bottom of the screen.

Select entry:

My Sites

- The new site will be labeled "New site". You can type over this name. Choose a name that makes sense for you. In this example we named the site "DFS SFTP".

Site Manager

Select entry:

My Sites

DFS SFTP

- At the top of the right pane you will see a drop down for "Protocol". Select "SFTP - SSH File Transfer Protocol".

General Advanced Transfer Settings Charset

Protocol:

SFTP - SSH File Transfer Protocol

Host:

FTP - File Transfer Protocol

SFTP - SSH File Transfer Protocol

Jurisdiction:

Storj - Decentralized Cloud Storage

- Enter Host: dfs-sftp-lb.dfsmail.com and Port: 22. If you are using a Username and Password set your "Logon Type" as "Ask for Password". If you are using a public key select "Key file". For either option, enter your username where it says "User:".

General

Advanced

Transfer Settings

Charset

Protocol:

SFTP - SSH File Transfer Protocol

▼

Host:

dfs-sftp-lb.dfsmail.com

Port:

Jurisdiction:

Logon Type:

Ask for password

▼

User:

Username

Password:

●●●●●●●●●●

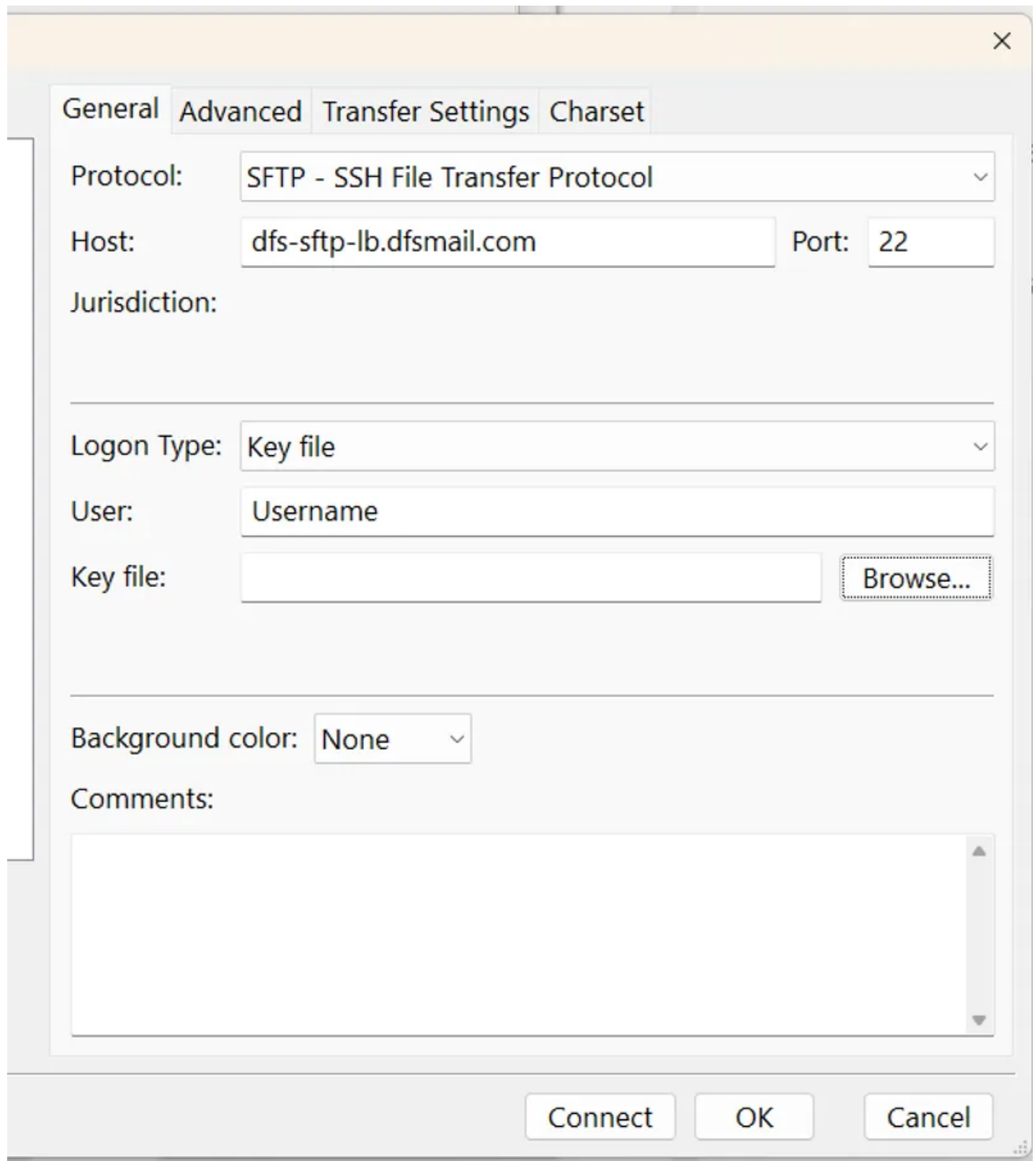
Background color:

None

▼

Comments:

7. If you selected "Key file", click "Browse..." to navigate to your key file.



DFS

General Advanced Transfer Settings Charset

Protocol: SFTP - SSH File Transfer Protocol

Host: dfs-sftp-lb.dfsmail.com Port: 22

Jurisdiction:

Logon Type: Key file

User: Username

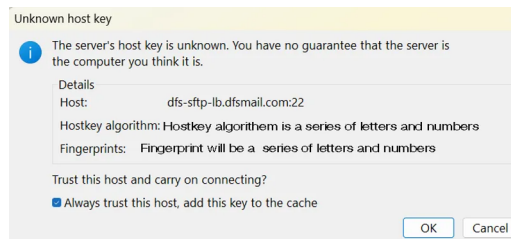
Key file: Browse...

Background color: None

Comments:

Connect OK Cancel

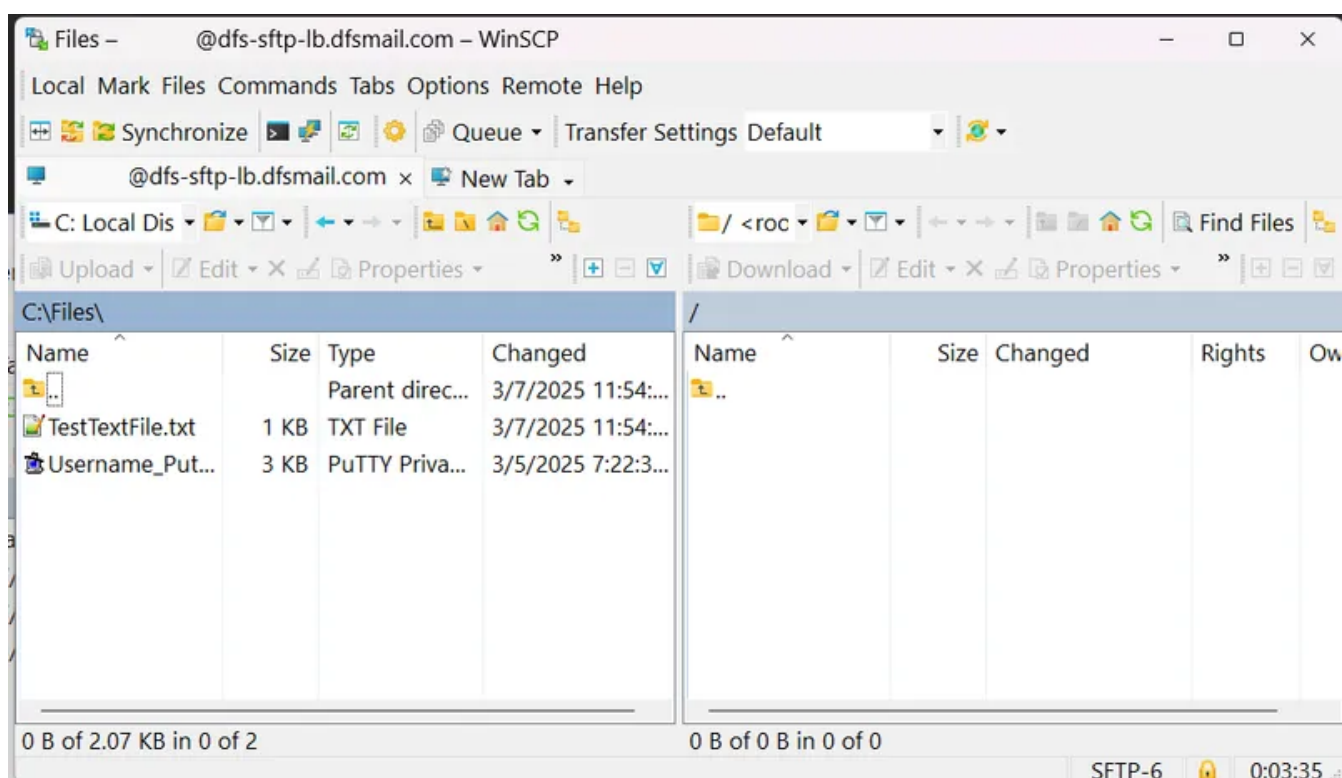
8. Click "Connect". If you are using a password, you will be prompted for your password.
9. You may be presented with a screen similar to the one pictured below. To avoid having this popup each time you login, ensure "Always trust this host, add this key to the cache" is selected and click "OK".



- If you received an error message, please proceed to [troubleshooting](#) where we will walk through some of the most common issues our customers encounter.

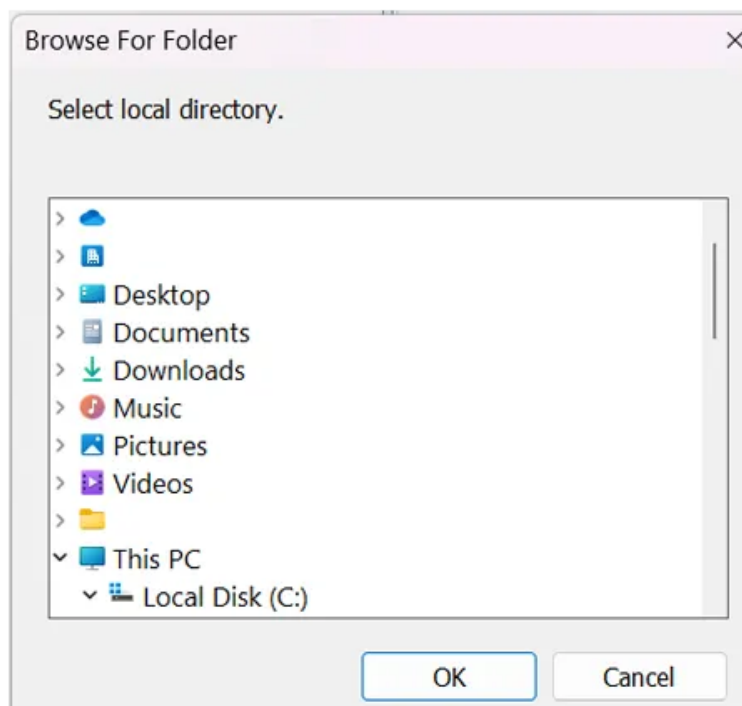
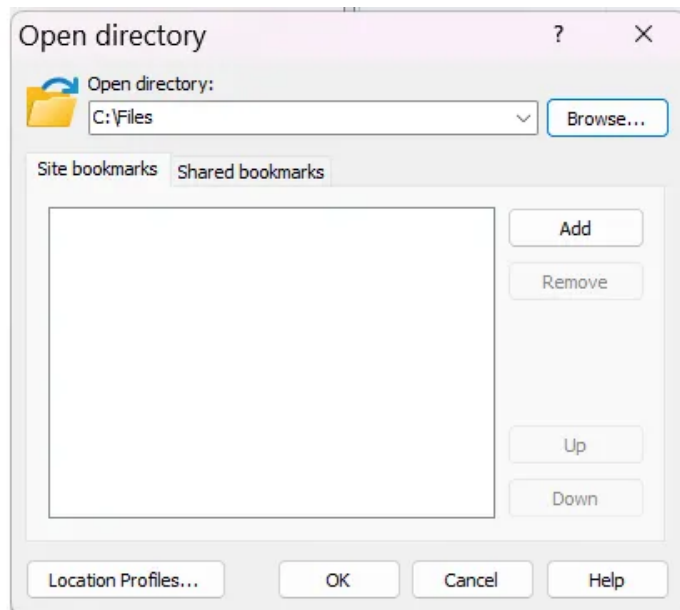
Transferring Files

Let's start with familiarizing ourselves with the screen. As you can see, the bulk of the application screen is split in half. On the left side you will see a folder location on your computer. The right shows the folders and files on the SFTP server. In this example, there are 2 files on the computer used to log in to SFTP and there isn't anything in the SFTP directory.



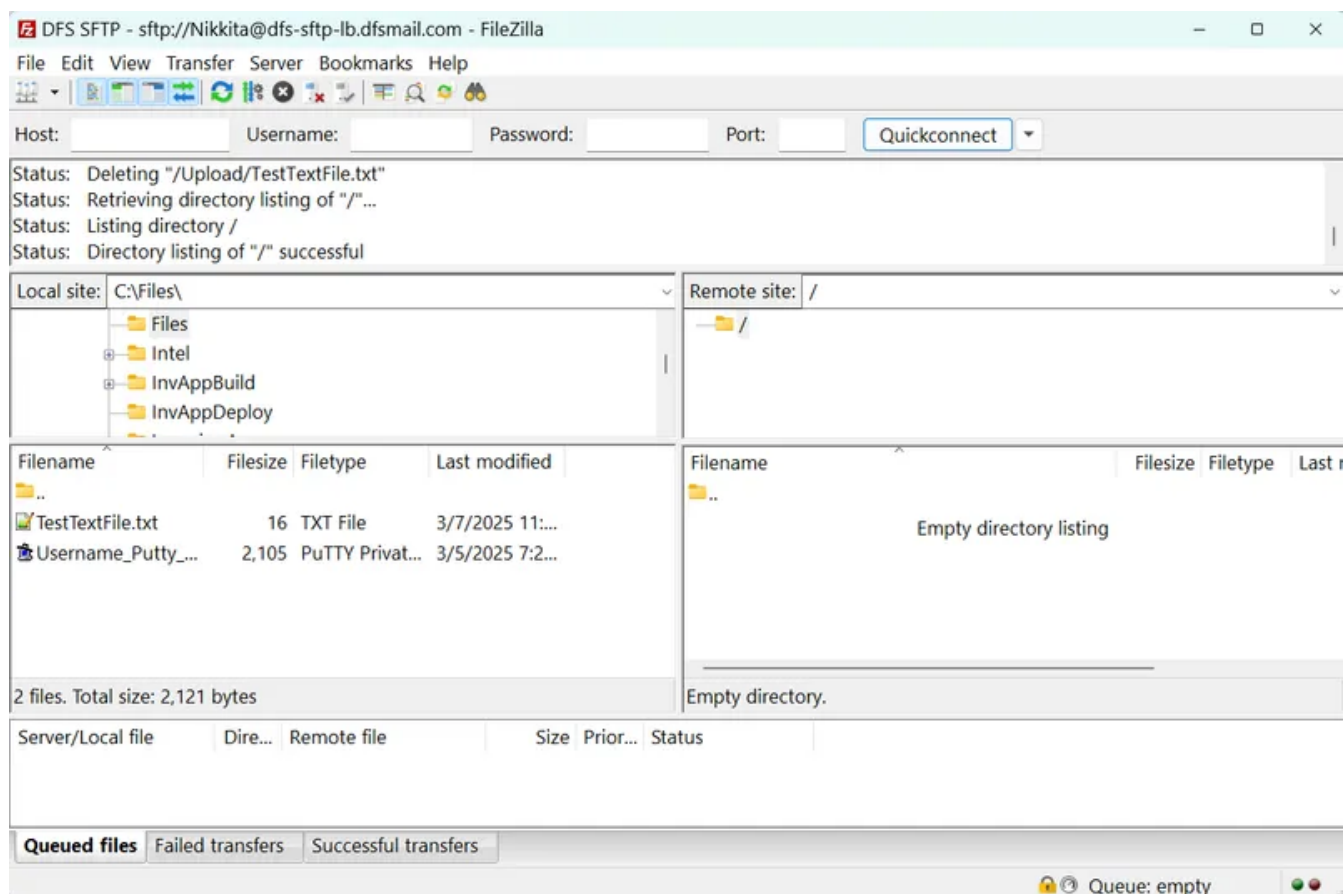
The first thing we are going to do is navigate to the location of the file we want to move and in the opposite pane, we will navigate where we'd like to place the file. Remember, the left side is your computer and the right side is the SFTP directory.

If you are having difficulty using the interface to navigate to a file location, try clicking the "Open Directory" icon on the pane where you are trying to navigate and clicking Browse. This interface may be more familiar.



✓ Transferring files with FileZilla

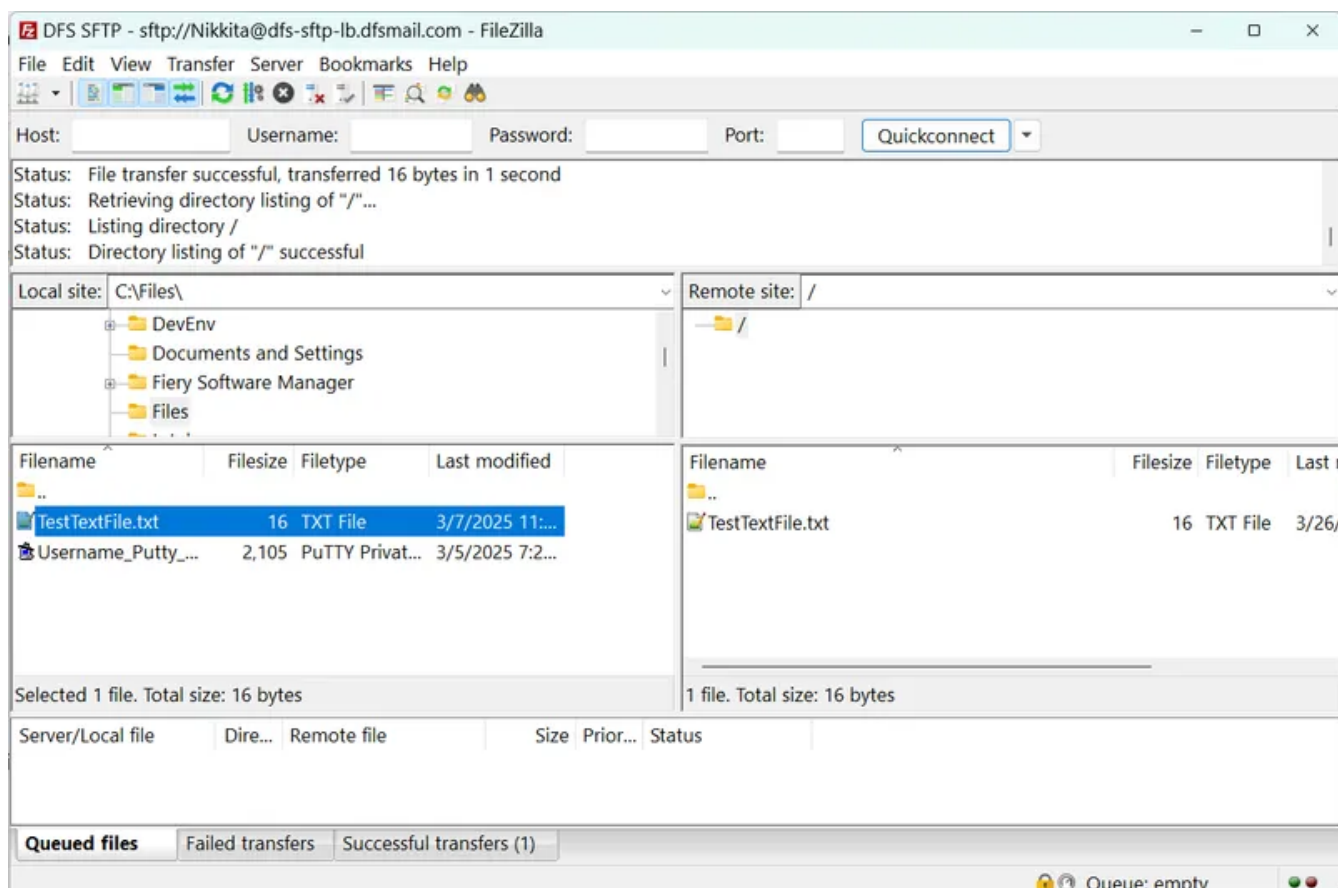
Let's start with familiarizing ourselves with the screen. As you can see, the bulk of the application screen is split in half. On the left side you will see folder locations and files within a selected directory on your computer. The right shows the folders and files on the SFTP server. In this example, there are 2 files on the computer used to log in to SFTP and there isn't anything in the SFTP directory.



The first thing we are going to do is navigate to the location of the file we want to move and in the opposite pane, we will navigate where we'd like to place the file. Remember, the left side is your computer and the right side is the SFTP directory.

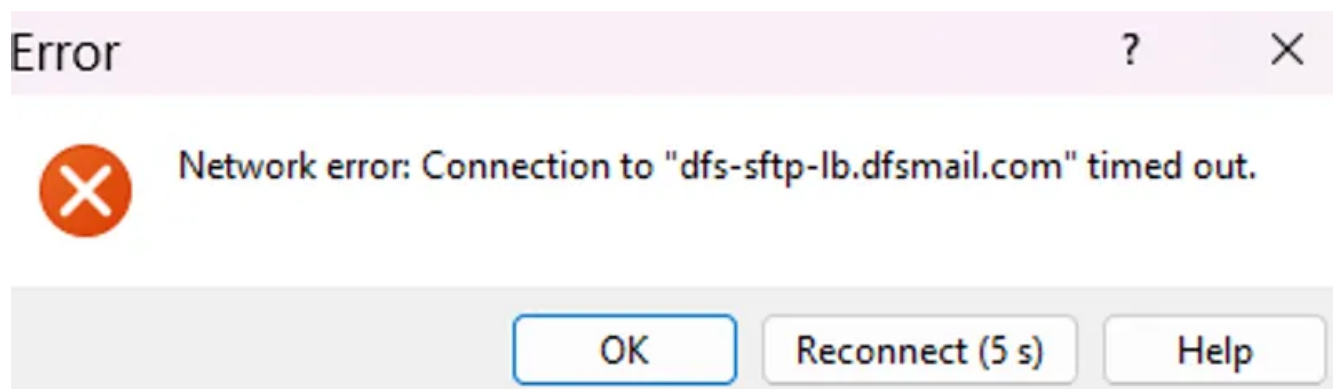
When you have navigated to where the file is located as well as where you'd like to place the file, transferring files is as simple as double clicking or dragging the file icon to where you want it to go.

When the file is copied, you will see it appear in the pane where you copied the file to.



Troubleshooting

✓ **Network Error: Connection to "dfs-sftp-lb.dfsmail.com" timed out**



Network Error: Connection to "dfs-sftp-lb.dfsmail.com" timed out

Double check your Host Name

Make sure you are connecting to dfs-sftp-lb.dfsmail.com

If there are any typos then you will be unable to connect.

Are you using Port Number 22?

You must set the port number to Port 22. Any other numbers would likely result in this error.

Has your Public IP address changed?

There are several scenarios that could cause a public IP address to change. If your public IP address has changed then a [ticket will need to be submitted to DFS](#) to update your Public IP address.

Here are some of the most common things that can cause a person's public IP Address to change

- **Dynamic IP Assignment** (Most Common)
 - Internet Service Providers (ISPs) often assign **dynamic** IP addresses using **DHCP (Dynamic Host Configuration Protocol)**. This means that when your modem/router reconnects or after a certain lease time expires, the ISP may assign a new IP address.
- **Modem/Router Reboot**
 - Restarting your modem or router can sometimes result in a new IP address, especially if your ISP assigns IPs dynamically.
- **ISP Network Changes**
 - ISPs may periodically reassign IP addresses for network optimization, load balancing, or maintenance.
- **Power Outage or Network Disruption**
 - If your connection is interrupted due to a power outage or ISP maintenance, your modem/router may get a different IP address when it reconnects.
- **Switching Networks or ISPs**
 - If you connect to a different network (e.g., moving from home Wi-Fi to a mobile hotspot), your public IP address will change.
- **Using a VPN or Proxy**

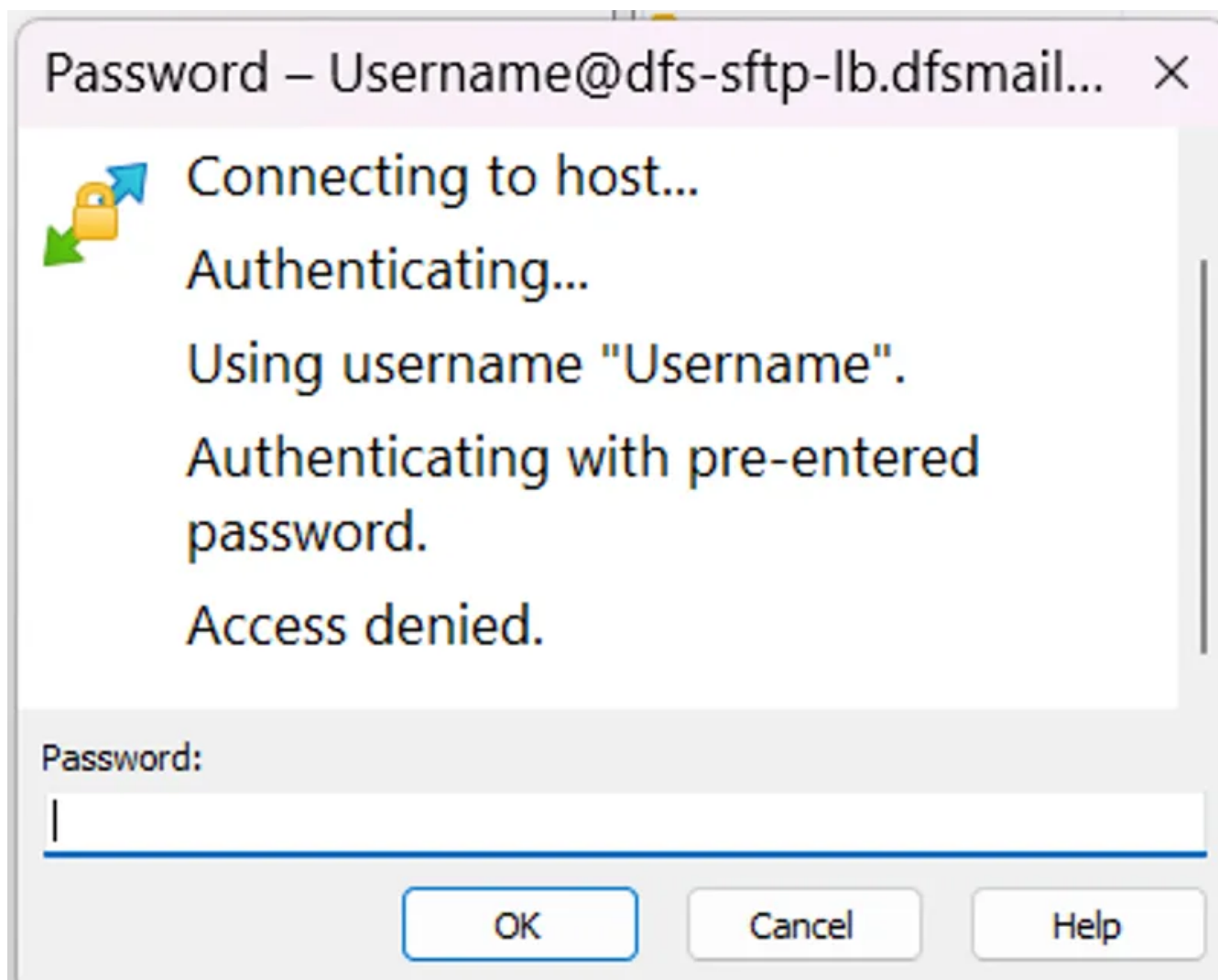
A Virtual Private Network (VPN) or proxy server can mask your real IP and provide a different public IP address.

Still having problems or your cause isn't listed?

Have you double checked everything and your issue is still not resolved? We're here to provide more advanced support to resolve your error. Please submit a support ticket by emailing Account Services.

[Email Account Services](#)

▼ Access Denied



This error is usually caused by incorrect credentials. Check the following:

Double check your username

This may sound simple but even the most insignificant typo in a username will cause an Access Denied error.

Double check your password

If you are using a password to login, make sure it's exact. Is your Caps Lock on? Could you have possibly entered a zero instead of the letter O? The password field in WinSCP is masked, so it's hard to be sure you entered every character correctly. If you keep getting a password denied error, try copying and pasting the password into the password field to make sure you have it right.

Still having problems or your cause isn't listed?

Have you double-checked everything and your issue is still not resolved? We're here to provide more advanced support to resolve your error. Please submit a support ticket by emailing Account Services.

[Email Account Services](#)

▼ All other errors

Are you experiencing an error that is not already listed?

We're here to provide more advanced support to resolve your error. Please submit a support ticket by emailing Account Services.

[Email Account Services](#)

▼ Documents and Forms

[DFS SFTP Account Request Form.pdf](#)

▼ Revision History

Version Date	Updater Name	Description
March 7, 2025	Nikkita Parker	Initial draft
March 26, 2025	Nikkita Parker	Added instructions for FileZilla

9.6. Widgets

Welcome to Your Portal Homepage

The Homepage dashboard is designed to give you quick access to the information that matters most to you. Using the customizable widgets, you can monitor work order activity, track work order approvals, and review work order postage activity—all from one convenient location.

Whether you're an internal team member or an existing customer, dashboard widgets allow you to organize information based on your needs and workflow.

What are Portal Widgets?

Portal Widgets are customizable dashboard sections that display work order information and give the user quick visibility to track certain historical activity.

Users Can:

- Add or remove widgets from their dashboard.
- Rearrange widgets by dragging and dropping them to different locations.
- Resize widgets to prioritize the information most important to each user.
- Create a personalized dashboard experience based on their preferences.

Think of widgets as individual information panels that can be organized to create your ideal workspace.

Internal Users → Team Members

- Monitor work order activity
- Track approval queues
- Review postage transactions

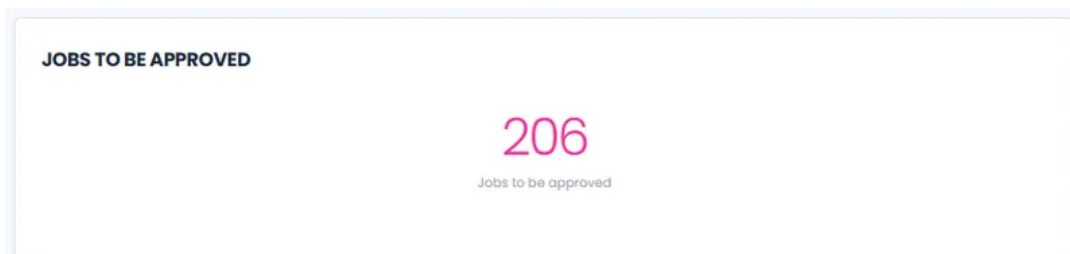
External Users → Customers

- Monitor job status in real time
- Track postage activity
- View pending approvals

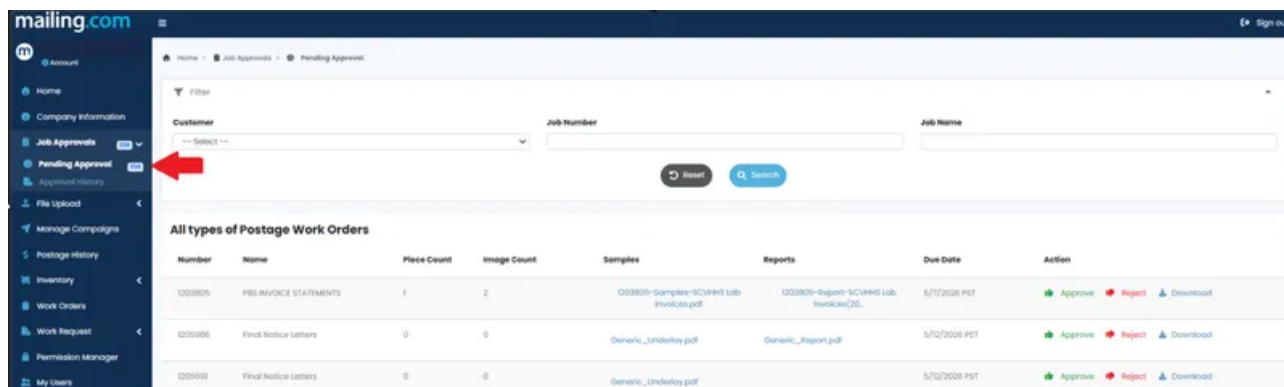
Available Dashboard Widgets

Jobs to Be Approved

Displays the total number of jobs currently awaiting approval. This widget helps users quickly identify pending work orders requiring review and action.



Clicking on the widget above will automatically route you to the Pending Approvals tab 



The screenshot shows the mailing.com dashboard with the 'Pending Approvals' tab selected. A red arrow points to the 'Pending Approvals' link in the left sidebar. The main content area displays a table titled 'All types of Postage Work Orders' with columns: Number, Name, Piece Count, Image Count, Samples, Reports, Due Date, and Action. The table lists three work orders with their respective details and actions (Approve, Reject, Download).

Number	Name	Piece Count	Image Count	Samples	Reports	Due Date	Action
Q23805	PBS INVOICE STATEMENTS	1	2	Q23805-Samples-SCVHHS Lab Invoice.pdf	Q23805-Report-SCVHHS Lab Invoice(20...	5/17/2026 PST	Approve Reject Download
Q25586	Final Notice Letters	0	0	Generic_Underlay.pdf	Generic_Report.pdf	5/12/2026 PST	Approve Reject Download
Q25588	Final Notice Letters	0	0	Generic_Underlay.pdf		5/12/2026 PST	Approve Reject Download

Completed Work Orders

Provides a list of recently completed work orders, including key details of the customer and work order like the piece and image count.

COMPLETED WORK ORDERS						
Customer Name	Work Order #	Work Order Name	Created Date	Mailed Date	Piece Count	Image Count
0 / 0						

▼ **List of Open Work Orders with Status**

Displays work orders and their production status, allowing users to monitor progress in real time.

LIST OF OPEN WORK ORDERS WITH STATUS							
Customer Name	Work Order #	Work Order Name	Create Date	Due Date	Piece Count	Image Count	Status
0 / 0							

✓ Postage History - Last 5 Deposits

Shows the five most recent postage account deposits for quick reference and account tracking.

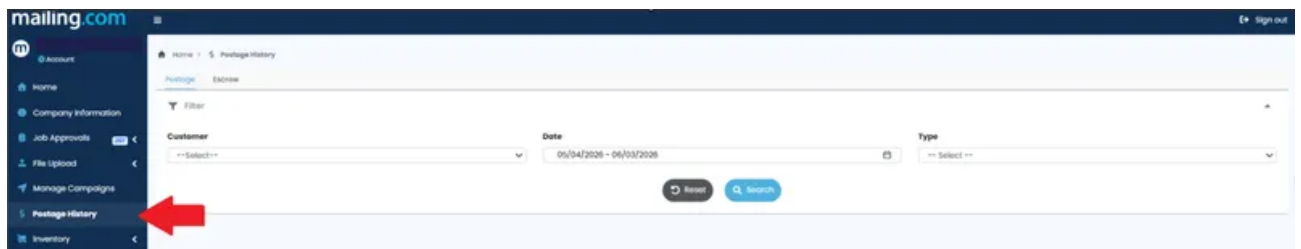
POSTAGE HISTORY

Last 5 deposits


[View All](#)

No records found.

View All  Takes you directly to the Postage History tab in Portal.



✓ Postage Pending Approval

Displays postage-related requests that are awaiting approval, helping users manage and monitor pending postage transactions.

PENDING APPROVAL			50% 75% 100%
Postage Pending Approval			
Number	Name	Due Date	
1203805	PBS INVOICE STATEMENTS	5/7/2026 PST	
1205986	Final Notice Letters	5/12/2026 PST	
1205991	Final Notice Letters	5/12/2026 PST	
1208168	Alternate Format Braille	5/15/2026 EST	
1209983	Alternate Format Large Print	5/20/2026 PST	
1 / 42  			

Service Pending Approval

Lists Service type of work orders currently awaiting approval.

PENDING APPROVAL			View All
Service Pending Approval			
Number	Name	Due Date	
No records found.			
0 / 0			

Postage History - Last 5 Deductions

Provides visibility into the five most recent postage deductions made from a customer account.

POSTAGE HISTORY		View All
Last 5 deductions		
No records found.		

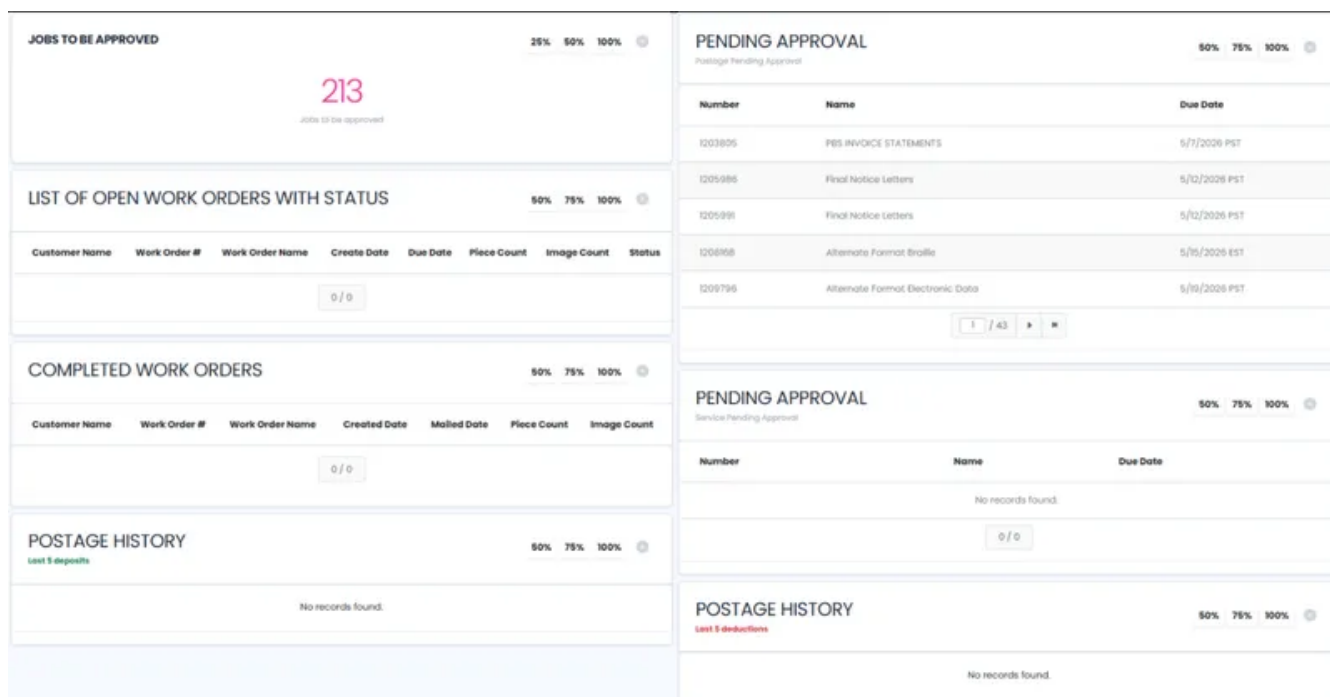
✓ Managing Your Widgets

To customize your dashboard:



1. Navigate to the Homepage and click on **Edit Layout**
2. Click on **+Add Widgets**
3. **Choose the widgets** you would like displayed → **Save**
4. **Drag and drop** widgets to rearrange their location.
5. **Resize** widgets as needed to emphasize important information.
 1. Option to zoom in/out by percentage: 25, 50, 75, 100%.
6. Select **Save** to keep your dashboard layout.
7. Select **Cancel** to discard any unsaved changes.

Tip: Arrange your most frequently used widgets near the top of the page for faster access throughout the day.



This flexibility allows each user to create a dashboard that best supports their responsibilities and daily tasks.

9.7. Work Order Life Cycle

Work Order Cycle

The Work Order Cycle refers to the sequence of statuses a work order progresses through—from initial creation to final verification and billing. Each stage represents a checkpoint to ensure accuracy, authorization, production execution, and completion.

✓ Process Overview

● Setup Phase

1. WO is Created

Customer and job template are selected. Depending on the customer and job, this is both an automated and manual process.

2. Created - Ready

All required details must be completed:

- Inventory
- SLA
- Counts
- Job Specifications

3. Pending Authorization

The work order is fully prepared and awaiting review and approval before production.

4. Review Decision

Decision	Decision
 Approved	 Rejected
The work order has been reviewed and authorized to proceed to production.	The work order was reviewed but not approved for production.
 Moves to Ready for Production	 Outcome: Work order is Cancelled in the system.

Production Phases

5. Ready for Production

The work order is released to the production floor and queued for printing.

6. Printing

Print operator sends job to the printer.

7. Ready to Insert

Printing is now complete. Job is then moved to the inserting department.

8. Inserting

The job is actively processed through inserting equipment.

Completion & Post-Production

9. Ready to Mail

Inserting is complete, requirements are met, and the job is ready for mailing preparation.

10. **Mailed**

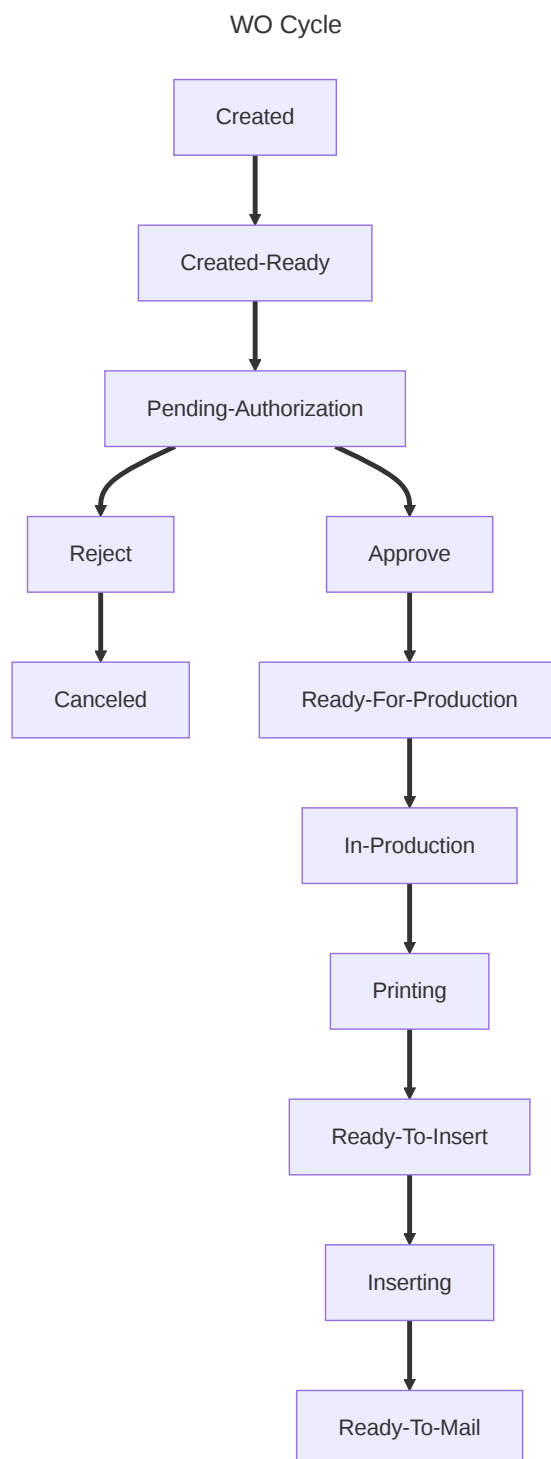
Job is completed by production and sent forward for review. If discrepancies are found, these is where they are corrected.

11. **Verified**

All checks are complete. Work order is ready for billing.

✓ Process Flow

This diagram shows the life cycle of how a work order moves once it is created and the possible outcomes.





9.8. Work Order Request

Welcome to the Work Order Request process! This will help you easily create requests for Inserting and Mailing services at DFS. This simple guide will walk you through each step to make sure your submission goes smoothly.

Purpose

The purpose is to assist customers in submitting work orders specifically for insertion and mailing. Printing services are not included as part of this process. All materials must be preprinted and ready for insertion.

✓ Who is This Guide for?

This guide is intended to be used by customers that are setup to have their physical mail picked up and inserted at DFS.

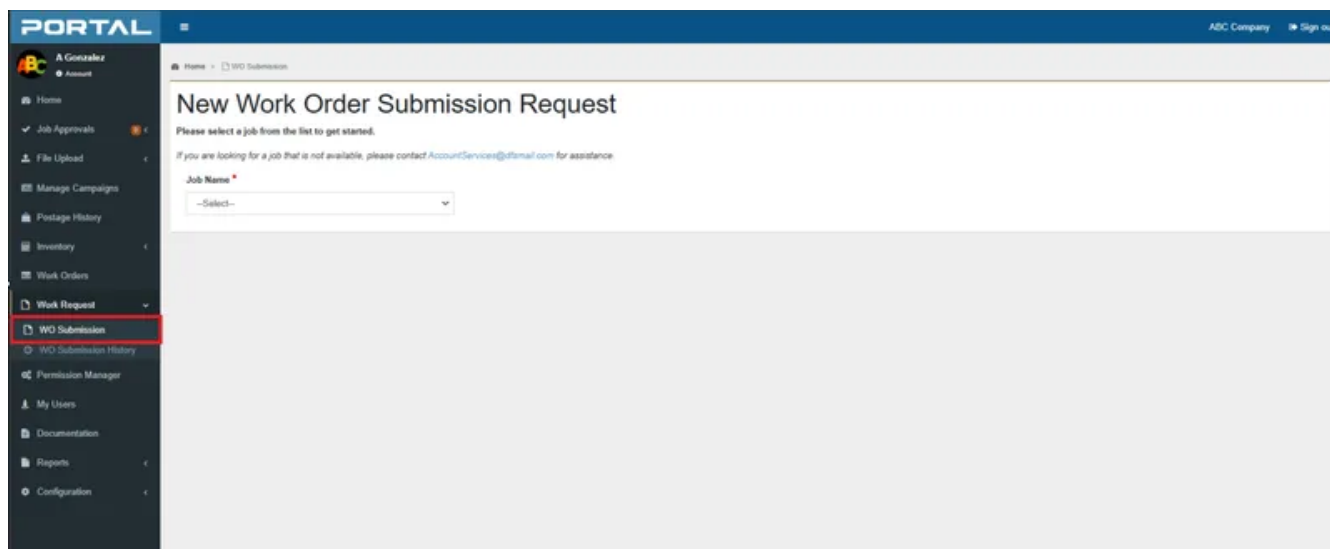
If you are not currently setup but are interested, please send your request to our Account Services team by clicking on the button below.

[Submit Your Request](#)

✓ Submitting Your Work Order Request

WO Submission

Once your account is set up for Portal WO Requests, your whole team can easily access the Work Request tab, including WO Submission and WO Submission History.

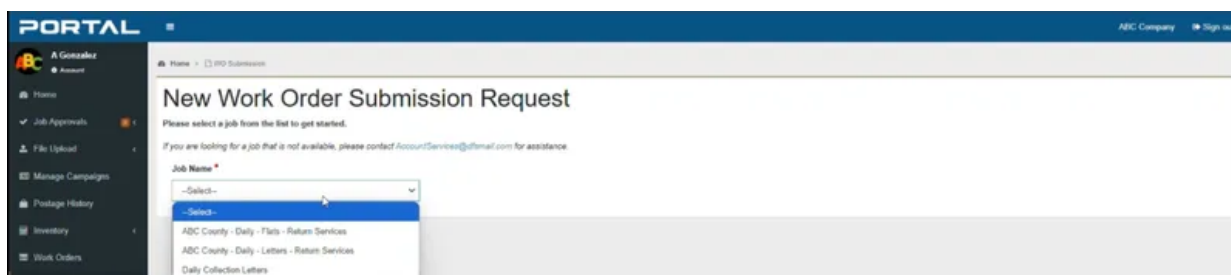


Initiate a Request

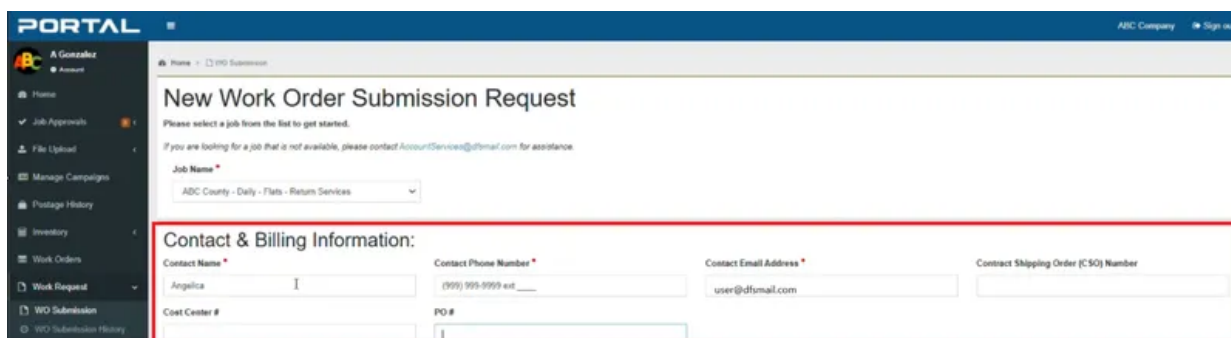
Navigate to WO Request/WO Submission tab

1. Based on your setup, you'll see a list of your available Job Templates.

1. If you do not see your job listed or need a new job added, please contact [Account Services](#) by creating a Support Ticket below.



2. Enter all Contact & Billing Information.



3. Enter Job Details:

1. Requested Mail Date is based upon your designated SLA, however, you may choose a later date.
2. Enter how many total mail pieces are you sending.
3. Fill in Inventory quantities needed for each type on the Quantity Needed column.
 1. Note: The categories listed will display based on the Job setup.
 1. If nothing is needed for a certain item, you must note that '0' are needed on the field.
 2. There are instructions on what to do if an item needed for your job is not listed.

Job Detail Information:

Requested Mail Date? *

How many mail pieces are you sending? *

The Following inventory is available for this job.
Please enter the expected quantity needed for each.

Type	Item Number - Item Name	Quantity Needed *	Quantity Available
Envelope	3 - USPS-PMFatRate-LARGE-Box - USPS Priority Mail Flat Rate Large Box		4,421
Envelope	4 - USPS-PMFatRate-MEDIUM-Box-CatSAWS Use - USPS Priority Mail Flat Rate Medium Box CatSAWS Use (Top-Loading)		788
Envelope	5 - USPS-PMFatRate-Envelope - USPS Priority Mail Flat Rate Envelope		1,376

If an item needed is missing from the list, please note it in the Special Instructions and Account Services will assist with your request.

Are there any Special Instructions for this work order submission?

4. Pickup Details & Submitting Your WO:

1. If you need pickup services, choose 'Yes' and fill in the required information.
2. Same-Day pickup services must be submitted prior to 10am PST.
3. Once you have filled in all the required information, click Submit to DFS.
4. A confirmation email with a work order number and required paperwork will be emailed to the person submitting the request.
 1. This paperwork is required at the time of pickup.

Pickup Details:

Is a pickup of materials required by DFS?

Yes

If you select no, you will be required to deliver your materials to DFS

Request pickup date?

02/14/2025

Select your pickup location from the available list, or add a new location below:

-Select-

Address 1

123 ABC Road

Address 2

City

Sacramento

State

California

Zip Code

95626

Save Address

Will inventory be included with this pickup? (papers, envelopes, and/or inserts)

Yes

Type

Item Number - Item Name

Quantity sending with pickup?

Action

Envelope

USPS-PMFlatRate-LARGE-Box - USPS Priority Mail Flat Rate Large Box

100

Delete

Receive Notification upon Receiving

user@abcmail.com

Cancel

Submit to DFS

***No work will be picked up without accompanying paperwork.

WO Submission History

- Portal users will be able to see a history of all work order submissions.
 - Important details listed:
 - When the job was submitted
 - When it was set to mail
 - Who submitted the job
 - Status of the job

PORTAL								
A Gonzalez Account Home Job Approvals File Upload Manage Campaigns Postage History Inventory Work Orders Work Request WO Submission WO Submission History Permission Manager My Users Documentation Reports Configuration Home WO Submission History Date 02/04/2025 - 03/06/2025 Search Date For Create Date Submitter A Gonzalez Status All CSO # Cost Center # PO # Search Reset								
WO #	Job Name	Create Date	Due Date	Attachments	Submitter	Status	Reason	
979678	ABC County - Daily - Flats - Return Services	2/14/2025	2/14/2025 PST	PickupPrintTraveler_979678_2025021437	A Gonzalez	Cancelled on 2/18/2025 12:48 PM	Non-Billable: test	
1 / 1								

Create a Support Ticket



If you need further assistance, send a ticket into our system by using the button below.

Email Account Services

▼ Revision History

Version Date	Updater Name	Description
February 14, 2025	Angelica Gonzalez	Initial draft

10. Vault

The DFS Vault System is a secure, user-friendly storage solution designated to help you manage, access, and protect critical documents with ease. Whether you're a first-time user or need a quick refresher, we've created a super-useful guide to help you navigate it.

[User Guide](#)

10.1. User Guide

Introduction

Welcome! This guide will show you how Vault enhances your experience by providing secure and easy access to your document archive, invoices and statements, and payment processing options. Whether you're looking for a copy of a mailed document, manage your templates, or to process or review payments. Our Vault system ensures that your information is safe while making the process hassle-free.

What is Vault?

Vault is a system that provides a secure, convenient, and seamless way to store and manage your documents, payments and personal information.

✓ Who is This Guide For?

This guide is for customers who want to use Vault to:

- Log in and configure their account
 - Explore your uploaded Files
 - View stored General Documents
 - View and manage their Clients
 - View Invoices and Statements
 - Manage notification settings
-

✓ How to Use This Guide?

Whether you're a new or returning user, this guide will help you get the most out of your customer vault.

Getting Started

How to register and log in

Dashboard Overview

Key sections and their functions

Account Management

Updating profile details and preferences

Invoice & Statement

Paying Invoices, reviewing Statements

Support & Troubleshooting

Submitting tickets, FAQs, and common navigation issues

✓ Getting Started

How to Register?

When you register for Portal, the primary account user can grant you access to the Vault system inside the user settings. This must be done by an appointed administrator for your company.

How to Log In?

1. After your account is active, you can visit Vault here:

[Vault](#)

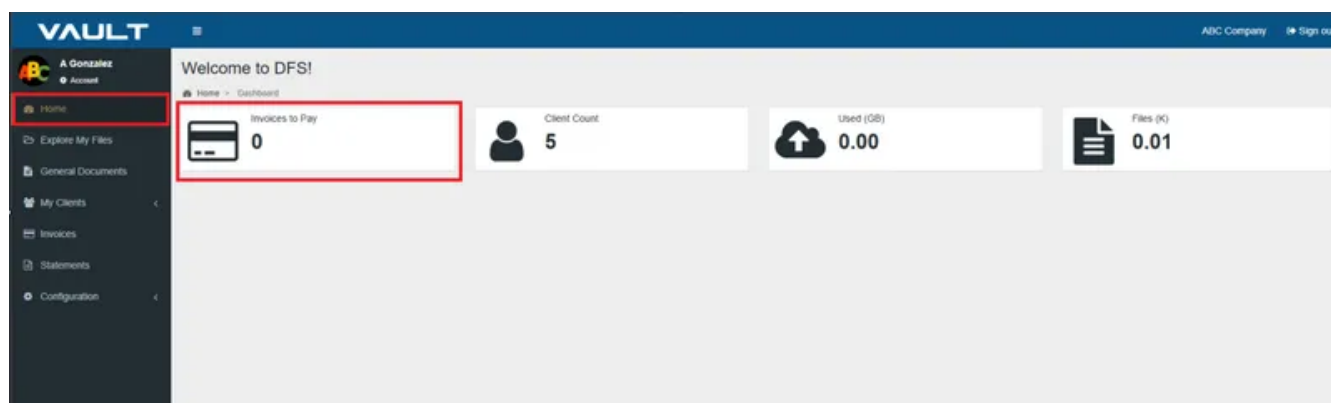
Dashboard Overview

Home

The Home Page serves as the central dashboard for your portal. Your central hub for securely managing payments, clients, and files. Below is the breakdown of each section to help you navigate and utilize its features effectively.

The Home section provides a quick overview of your account activity and key shortcuts, including:

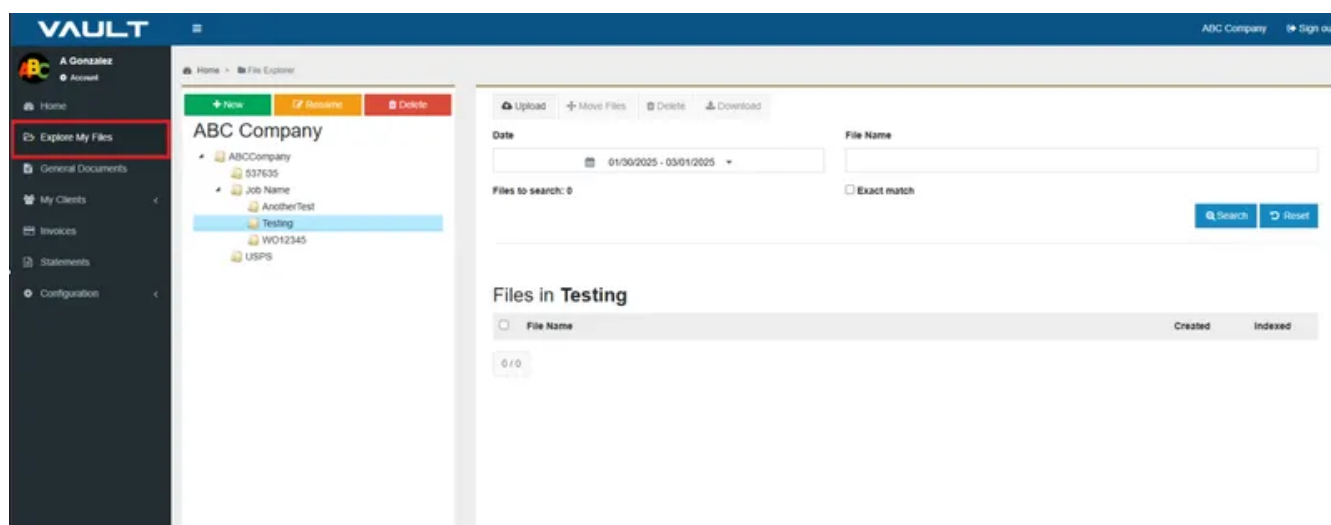
- **Invoices to Pay** - Easily access and settle outstanding invoices.
- **Client Count** - View the total number of clients linked to your account.
- **Files** - Quickly access stored documents for easy reference.



Explore My Files

A centralized location to browse and manage all files stored within the Vault. When applicable, you can upload, organize, and retrieve documents related to your transactions and clients.

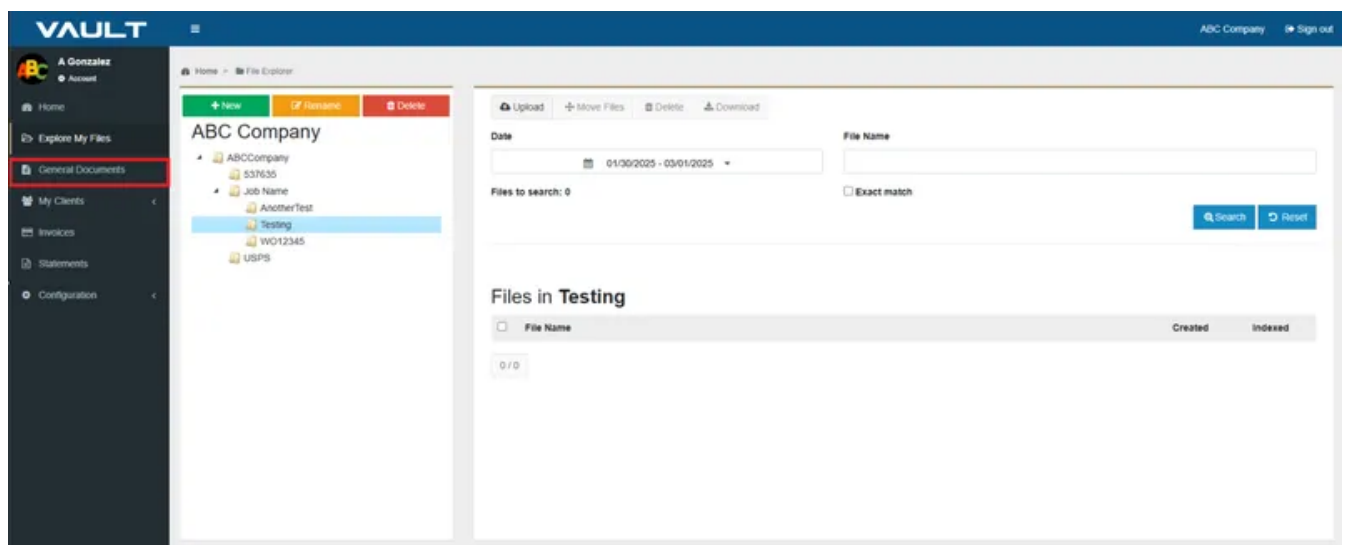
[Explore My Files](#)



General Documents

When applicable, this section houses important shared documents, such as agreements, policies, or other reference materials that you or your clients may need access to.

General Documents

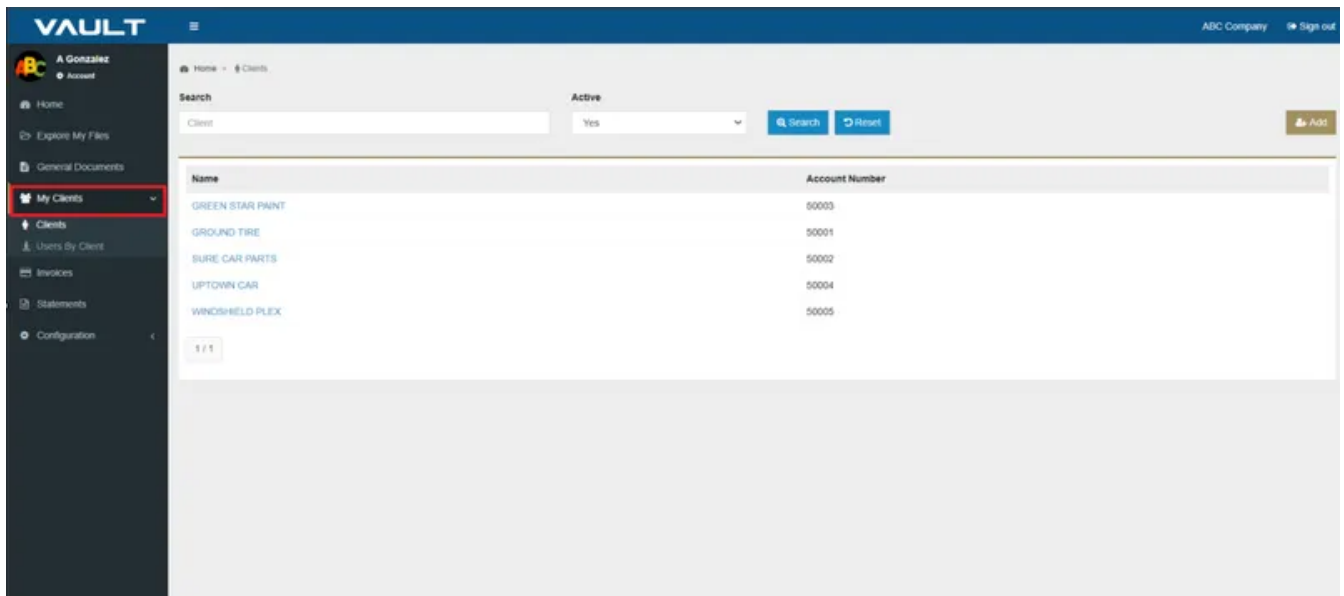


My Clients

View and manage your client database, including contact details, stored payment methods, and transaction history. This section allows you to update client information and track interactions.

To view a list of your clients, visit the direct link below:

My Clients

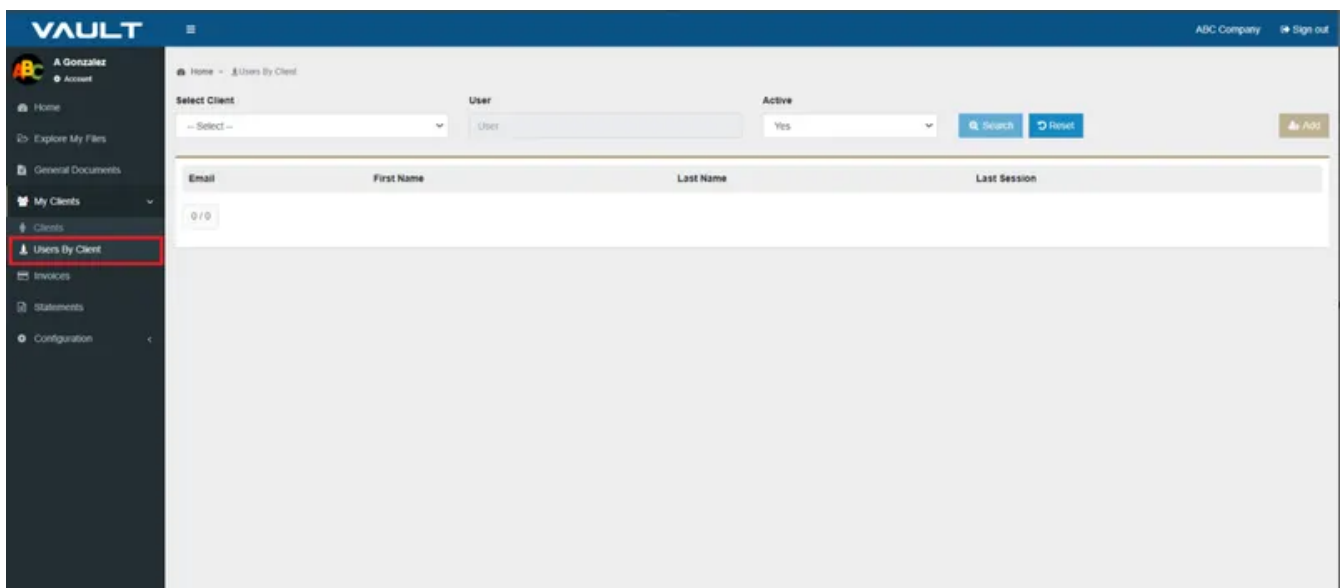


Name	Account Number
GREEN STAR PAINT	50003
GROUND TIRE	50001
SURE CAR PARTS	50002
UPTOWN CAR	50004
WINDSHIELD PLEX	50005

Users By Client

Monitor and manage authorized users within each client's account. This helps your business track access permissions and ensure the right individuals can manage payment details or invoices.

Users By Client



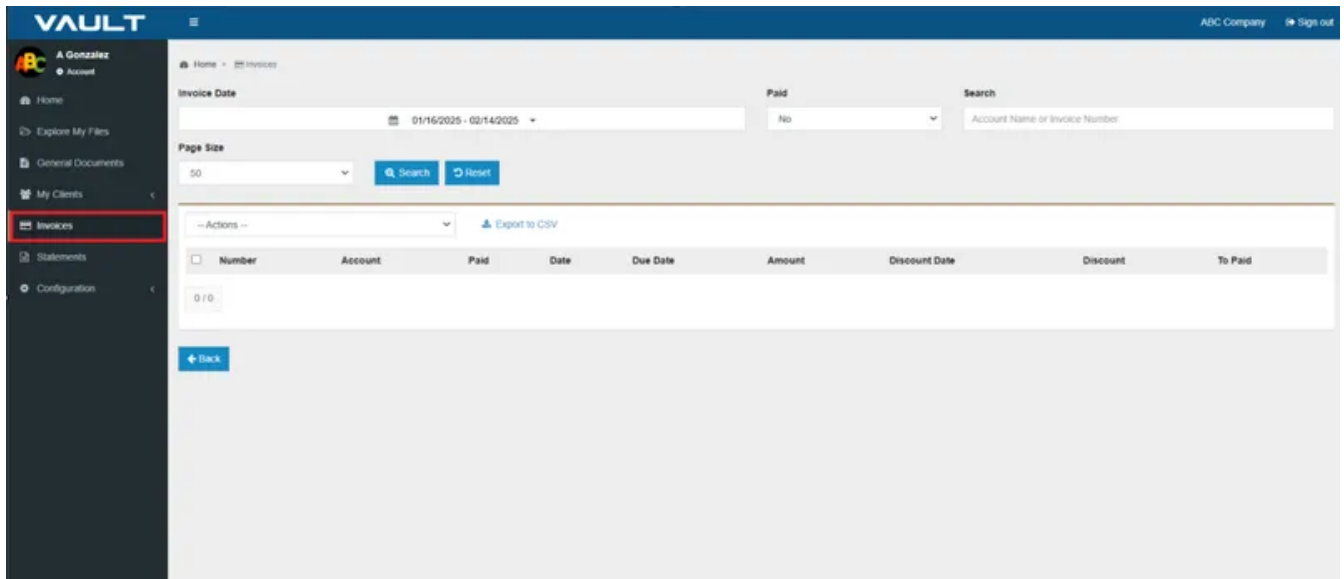
Email	First Name	Last Name	Last Session
0 / 0			

Invoices

Track, review, and process invoices. This section allows you to:

- View outstanding and paid invoices
- Set up automatic payments
- Download invoice copies for record-keeping

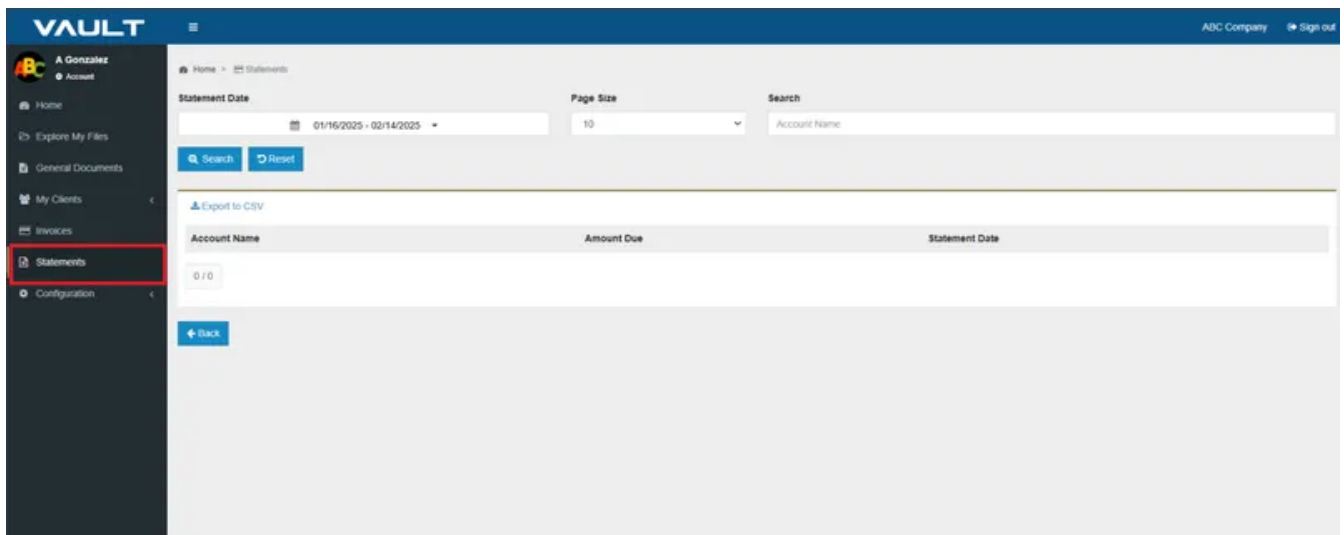
Invoices



Statements

Access detailed financial statements, including transaction summaries and payment history. This section helps with reconciliation and financial planning.

Statements



Configuration

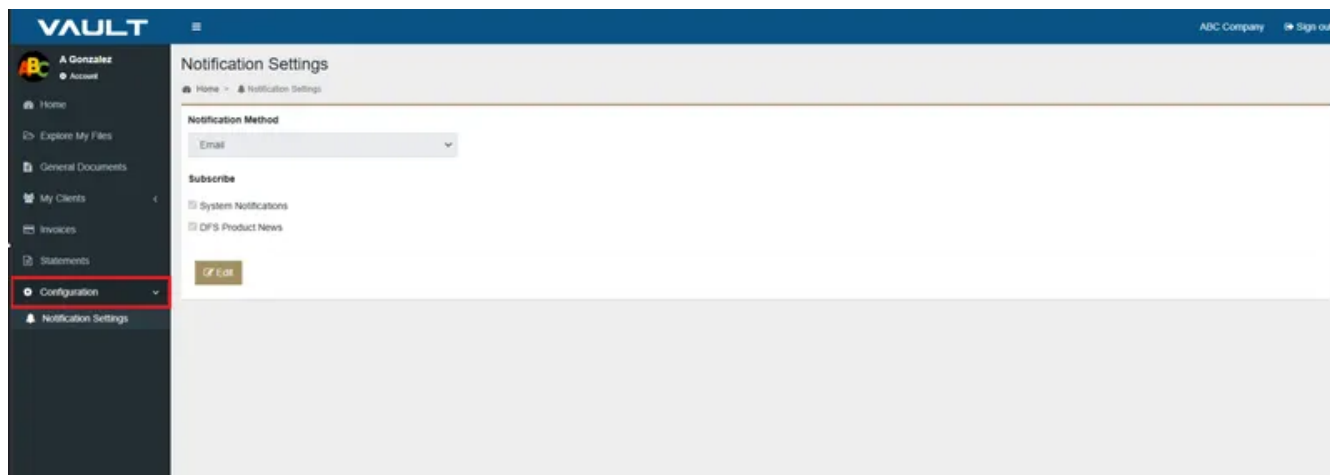
This section helps you stay informed without being overwhelmed by unnecessary alerts. By utilizing this section, you can efficiently manage your financial data while ensuring security and convenience. Customize your account notification settings, including:

Control how and when you receive alerts related to:

- Invoice due dates
- Payment confirmations
- Security notifications

Method of Notifications - Email or SMS

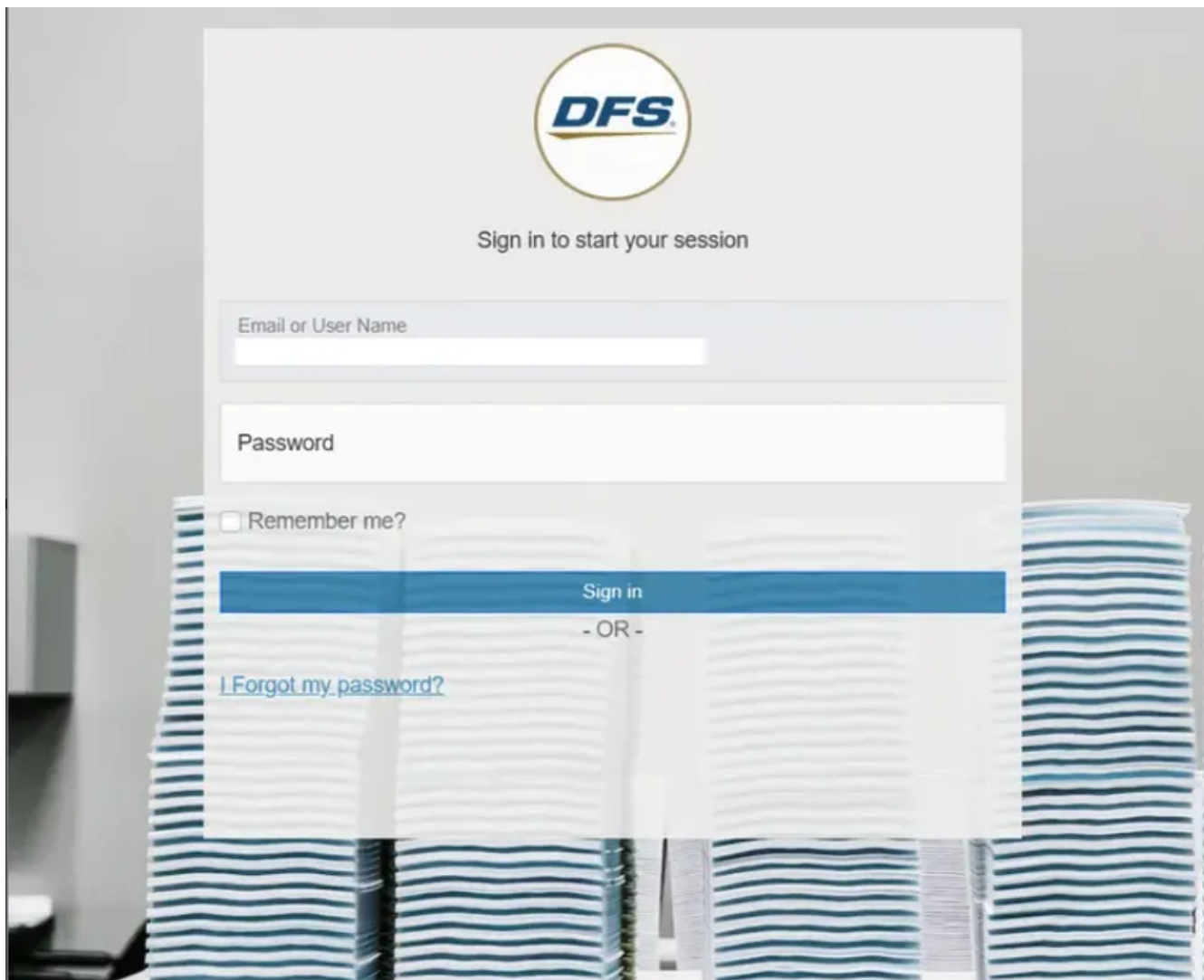
Configuration



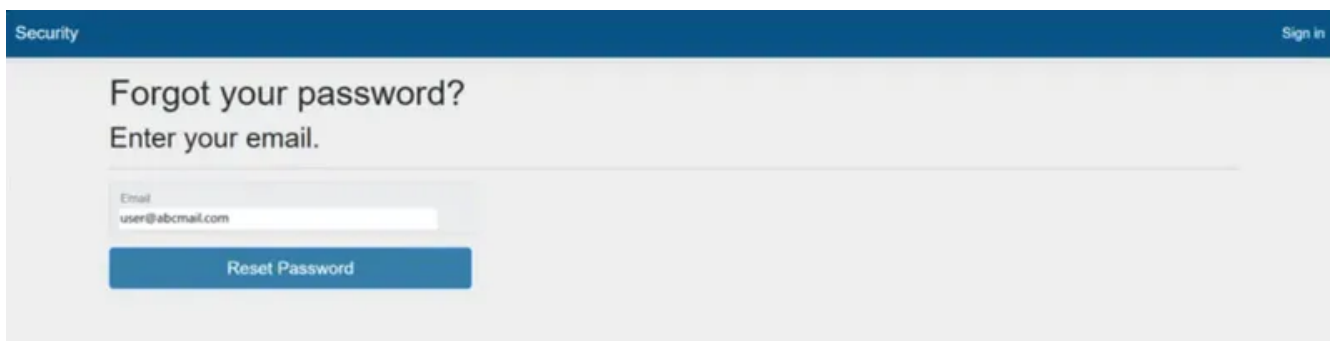
Frequently Asked Questions

✓ How can I reset my password?

Accounts are locked out when there are 5 unsuccessful login attempts. To reset your password, simply click "I Forgot my password" below the login fields, and follow the prompts.



Enter the email associated with your account and you will receive a link to reset your password.





✓ How can I grant access to a new user?

To give access to a new user, the primary admin user must create an account by gathering the following basic information from the new user:

- Valid email address

[Add User - From Portal](#)

1. The primary user must then navigate to Portal to add the account to their list of approved users.
2. Follow the basic prompts, and choose what access roles you'd like them to have available to them.
3. They'll promptly receive a Registration email where they'll need to fill out some basic information to get access.

Support

Need help or have a question about this guide? Send your question by emailing the Tech Writing department using the button below.

[Submit a Support Ticket](#)

✓ Roles and Responsibilities

Name	Responsibilities
Project Manager	• Measure and verify project scope. • Facilitate scope change requests. • Facilitate impact assessments of scope change requests. • Organize and facilitate scheduled change control meetings. • Communicate outcomes of scope change requests. • Update project documents upon approval of all scope changes.
Account Services	• Manage user access, troubleshoot issues, and oversee vault configurations. • Provides technical assistance, resolve user issues, and escalates issues with IT when needed.
Developers	• Maintain and enhance the vault's functionality based on feedback and evolving requirements.
Customer Users	• Responsible for accessing and utilizing the vault's features according to their role-based permissions.

▼ **Revision History**

Version Date	Updater Name	Description
February 20, 2025	Angelica Gonzalez	Initial draft

11. ZEUS

The Operational Brain of DFS

ZEUS is a robust and user-friendly platform designated to optimize workflow and simplify complex processes. With an intuitive interface and powerful capabilities, Zeus makes it easy to manage tasks, manage work orders, and streamline all operations-all in one place. From job and work order tracking to inventory control, billing and documentation, Zeus unifies every function into a single, seamless interface.

Whether you're a DFS team member or an approved customer, Zeus delivers clarity, precision, and full operational oversight.

Built for DFS. Powered by Zeus.

For DFS Employees

Zeus is your go-to tool for:

- Real-Time Job & Work Order Tracking.
- Full Inventory Oversight & Control.
- Automated Billing & Invoicing.
- Centralized Documentation & History Logs.

Every feature is accessible-ensuring that your workflow is faster, smarter, and error-free.

For Authorized Customers

Zeus if your go-to tool to:

- View & Manage Inventory Levels.
- Track Work Order Statuses - This can also be accessed via Portal.

Stay in the loop with live updates and real-time transparency on projects that matter.

Why Zeus?

- **Centralized Operations:** Everything DFS runs on-under one system.
- **Zero Error Infrastructure:** Built to reduce manual mistakes and increase accountability.
- **Secure & Scalable:** Controlled user access and high-level data security.
- **Live Insights:** See where a job stands at any moment, with full audit history.
- **Designed for Action:** Built from the ground up to match DFS workflows and scale with our growth.

Key Features at a Glance

- Work Order Lifecycle Tracking
- Dynamic Inventory Control
- Billing Integration & Payment Logs



-
- Secure Document Repository
 - Role-Based Access Control
 - Real-Time Dashboards & Alerts

Access Zeus

DFS Employees: Use their unique credentials to access the system functionality based on their role within DFS.

Customer Level: Login is permission-based.

- For access, contact our DFS Account Services Representatives

Security You Can Trust

- End-to-End Encryption
- Scheduled Backups & Redundancy
- Role-Based Access Levels
- Audit Logs for Full Transparency

Support & Training

New to Zeus? DFS offers internal self-training guides and support to ensure smooth onboarding and optimal usage.

[Submit a Support Ticket](#)

Zeus isn't just a system. It's the brain behind DFS operations.

Always connected. Always accountable. Always accurate.