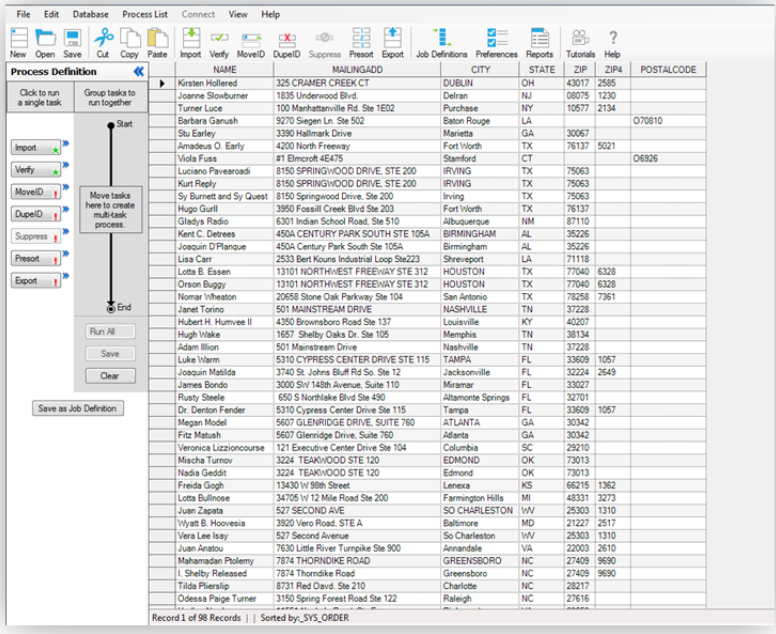
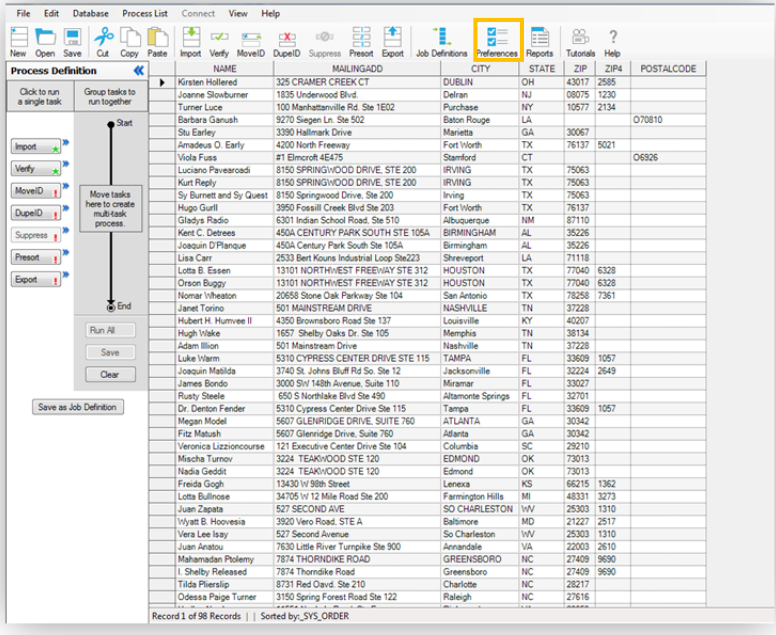
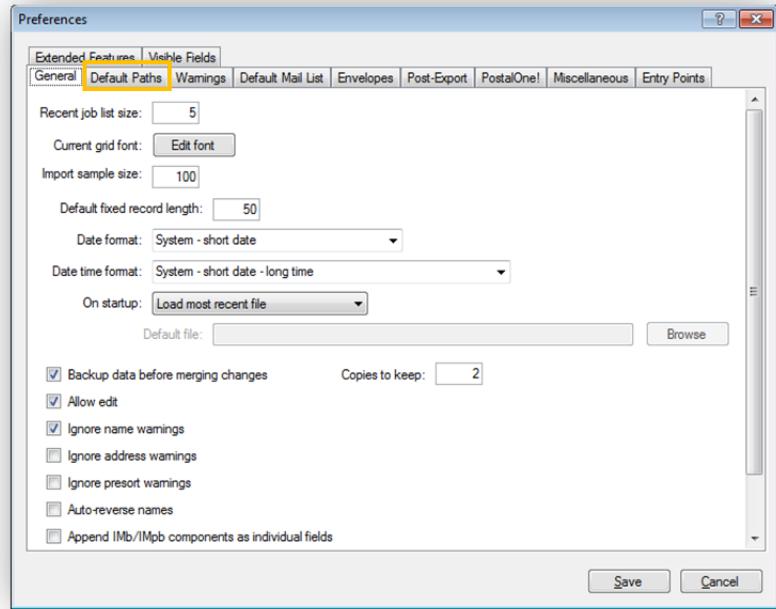


**Objective:** To export a mail list for printing using Envelope Designer or another application.

	Comment	ACTION – DO THIS
1	<p>The export function allows a file to be generated and saved outside of the ConnectRight Mailer application.</p>	 <p>The screenshot shows the ConnectRight Mailer interface. On the left, the 'Process Definition' panel has a 'Process Definition' section with a 'Start' button and a 'Process Definition' dropdown. Below this is a 'Process Definition' section with buttons for 'Import', 'Verify', 'MoveID', 'DupesID', 'Suppress', 'Presort', and 'Export'. The 'Export' button is highlighted. Below these buttons are 'Run All', 'Save', and 'Clear' buttons. At the bottom of the panel is a 'Save as Job Definition' button. The main window displays a list of records with columns for NAME, MAILING ADDRESS, CITY, STATE, ZIP, ZIP4, and POSTAL CODE. The status bar at the bottom indicates 'Record 1 of 98 Records   Sorted by SYS_ORDER'.</p>
2	<p>In order to simplify using your exported mail list to print your envelopes using Pitney Bowes Envelope Designer Plus, you can configure ConnectRight Mailer to launch Envelope Designer Plus during the export process.</p> <p>Select "Preferences" from the tool bar.</p>	 <p>The screenshot shows the ConnectRight Mailer interface, similar to the first screenshot. In this view, the 'Preferences' button in the tool bar is highlighted with a yellow box. The rest of the interface, including the 'Process Definition' panel and the main record list, is identical to the first screenshot.</p>

## ConnectRight™ Mailer Exporting a Mailing List

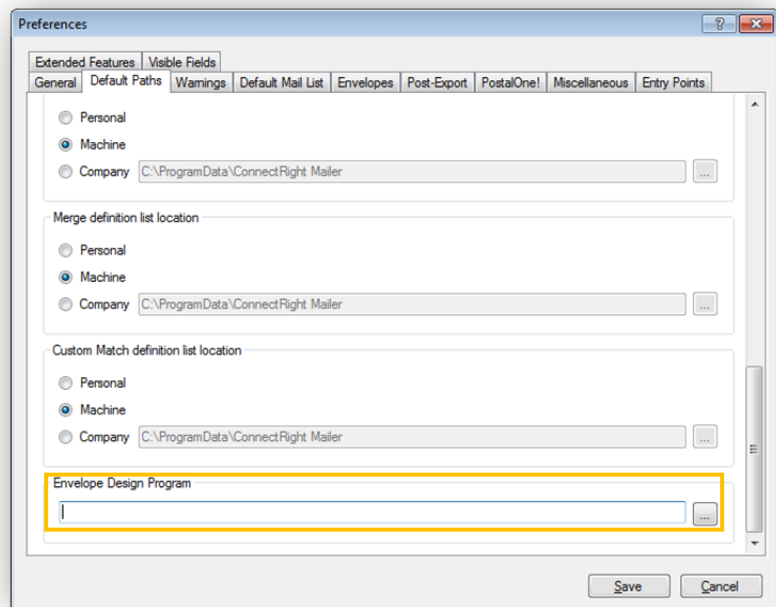
Select the "Default Paths" tab.



3

Scroll down to the "Envelope Design Program" field and browse to the Envelope Designer Plus program.

NOTE: This may have already been configured during the application installation process and nothing else is required.



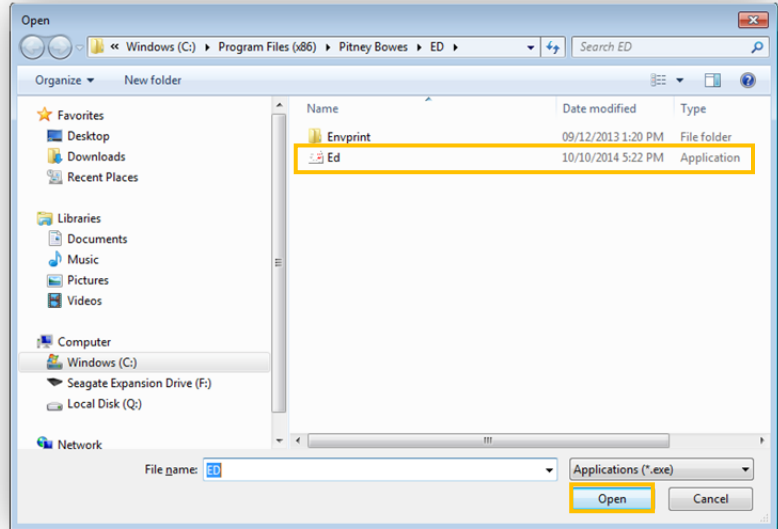
4

## ConnectRight™ Mailer Exporting a Mailing List

5

Envelope Designer Plus is typically saved to your main drive ("C:") under Program Files (or Program Files (x86) depending on your operating system) > Pitney Bowes > ED.

Select the "Ed" application and then click "Open."

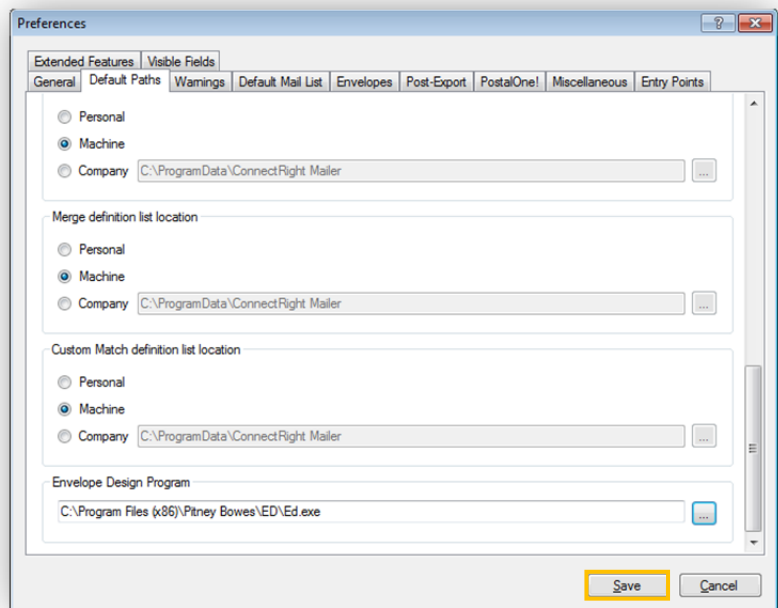


6

Finally, click Save to store your Envelope Design Program location.

To learn more about Envelope Designer, visit the following link:

<http://support.pb.com/ekip/index?page=content&id=RE15120>

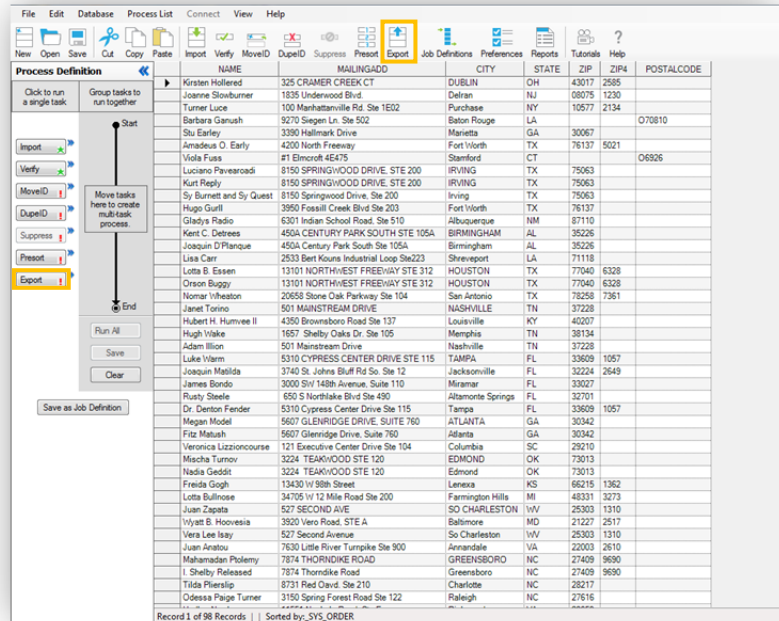


## ConnectRight™ Mailer Exporting a Mailing List

Begin by selecting the 'Export' option from one of the following locations:

- The 'Process Definition' menu
- The 'Export' icon on the tool bar or
- The 'Export' option in the 'File' menu

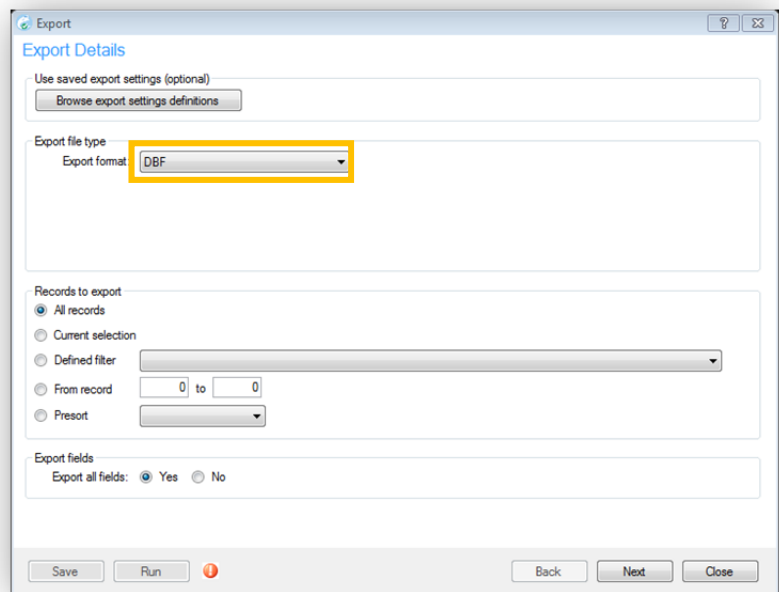
7



The 'Export Details' page will display.

Begin by selecting the format you would like to use when exporting your file

8

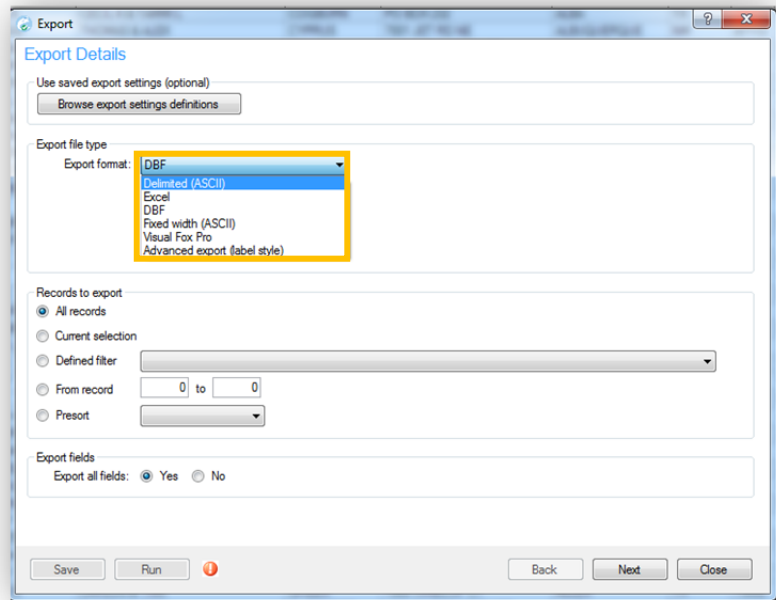


## ConnectRight™ Mailer Exporting a Mailing List

9

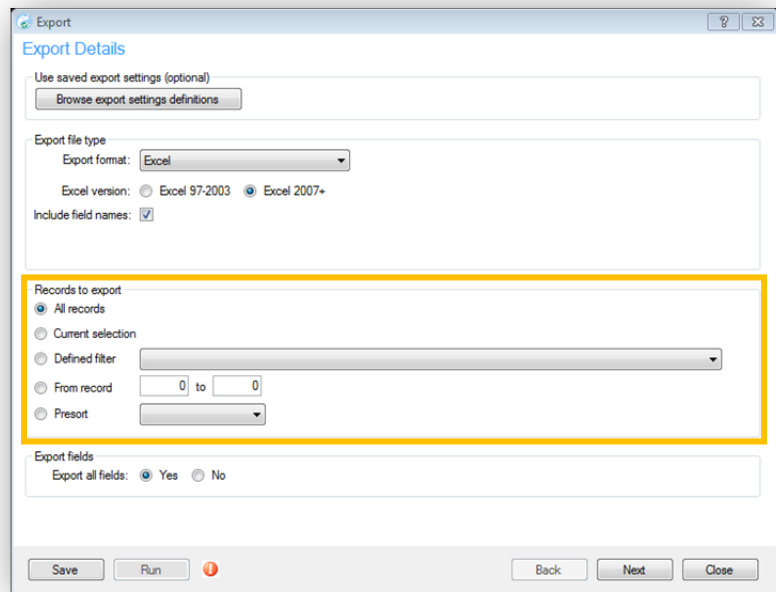
The drop down menu will give you a list of available File types.

Select the format you would like to use.



10

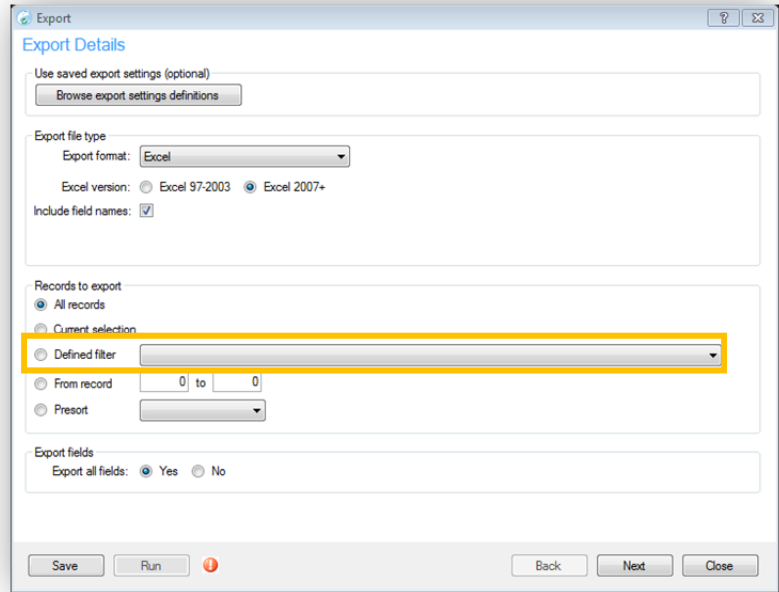
You can choose to export all the records in your list, or you can also customize which records to export.



## ConnectRight™ Mailer Exporting a Mailing List

11

To filter records that you wish to export, select a defined filter from the drop-down.

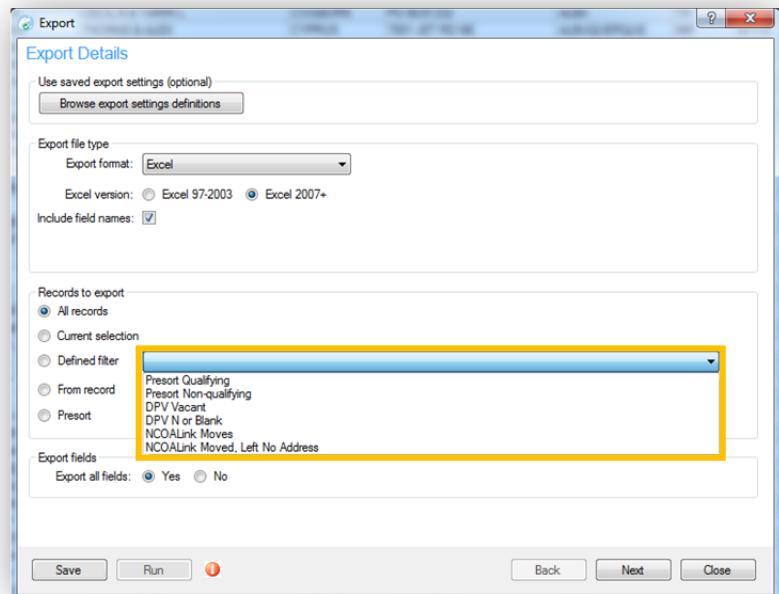


The screenshot shows the 'Export' dialog box with the following settings:

- Export format: Excel
- Excel version: Excel 2007+ (selected)
- Include field names:
- Records to export:  All records,  Current selection,  Defined filter (highlighted)
- From record: 0 to 0
- Presort: (empty dropdown)
- Export all fields:  Yes,  No

12

Filters can include addresses which did not qualify for presorting, or individuals which moved and left no forwarding address.



The screenshot shows the 'Export' dialog box with the 'Defined filter' dropdown menu expanded, showing the following options:

- Presort Qualifying
- Presort Non-qualifying
- DPV Vacant
- DPV N or Blank
- NCOALink Moves
- NCOALink Moved, Left No Address

## ConnectRight™ Mailer Exporting a Mailing List

13

You can also export a portion of the list by selecting the range of records to export.

The screenshot shows the 'Export' dialog box with the 'Export Details' section. Under 'Records to export', the 'From record' and 'to' fields are highlighted with a yellow box, both containing the value '0'. Other options include 'All records', 'Current selection', 'Defined filter', and 'Presort'. The 'Export format' is set to 'Excel' and 'Excel version' is 'Excel 2007+'. The 'Export all fields' option is set to 'Yes'.

14

The exported list can then be sorted in ascending or descending order.

The screenshot shows the 'Export' dialog box with the 'Export Details' section. The 'Presort' dropdown menu is open, showing 'Ascending' and 'Descending' options, which are highlighted with a yellow box. Other options include 'All records', 'Current selection', 'Defined filter', and 'From record'. The 'Export format' is set to 'Excel' and 'Excel version' is 'Excel 2007+'. The 'Export all fields' option is set to 'Yes'.

## ConnectRight™ Mailer Exporting a Mailing List

15

Finally, you can choose to export all the information in the mail list, including error codes, or simply export the name and address information.

The screenshot shows the 'Export' dialog box with the 'Export Details' tab selected. The 'Export format' is set to 'Excel' and the 'Excel version' is 'Excel 2007+'. The 'Include field names' checkbox is checked. Under 'Records to export', 'All records' is selected. The 'Export fields' section at the bottom has 'Export all fields' set to 'Yes'.

16

If you choose not to include all fields in your list, you will be directed to a screen giving you the option to select which fields to include.

The screenshot shows the 'Export' dialog box with the 'Fields to Export' tab selected. A list of fields is shown in a scrollable area, with a yellow box highlighting the list. The 'Fields to export' table is empty. The 'Include fields from processing' checkbox is unchecked. The 'Merge definitions available' section shows 'CSZ', 'ZIP 10-digit', 'ZIP9', and 'ZIP10 or PostalCode'.

Field name	Export name	Length
------------	-------------	--------

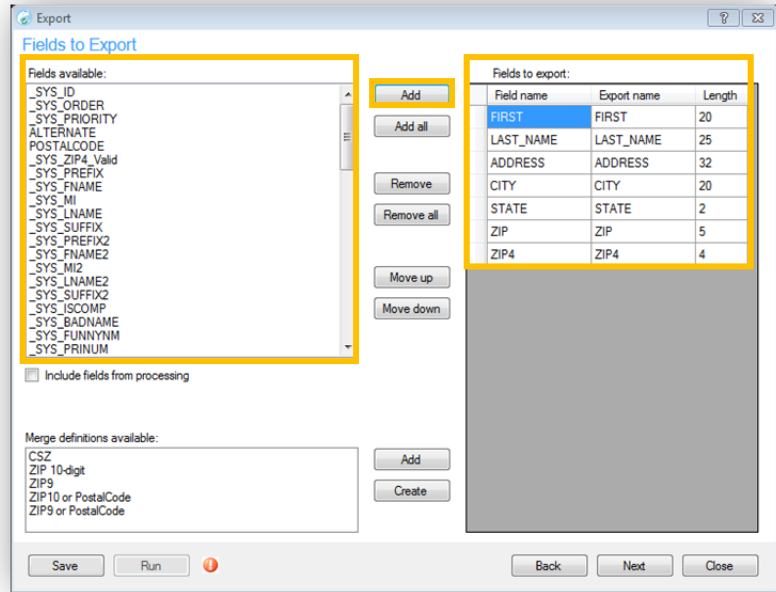


## ConnectRight™ Mailer Exporting a Mailing List

17

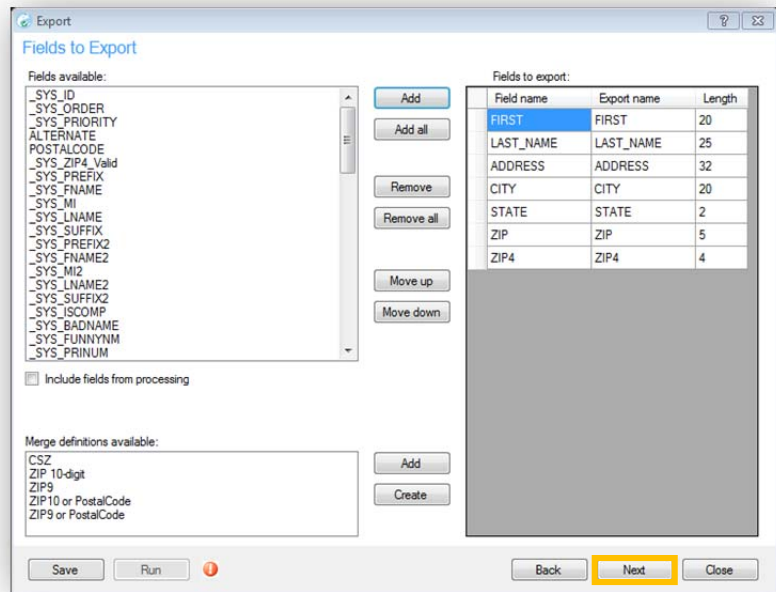
Click on any field you want to export, and select 'Add'.

Your choices will be displayed in the 'Fields to export' box.



18

When all desired fields have been selected, click the 'Next' button.

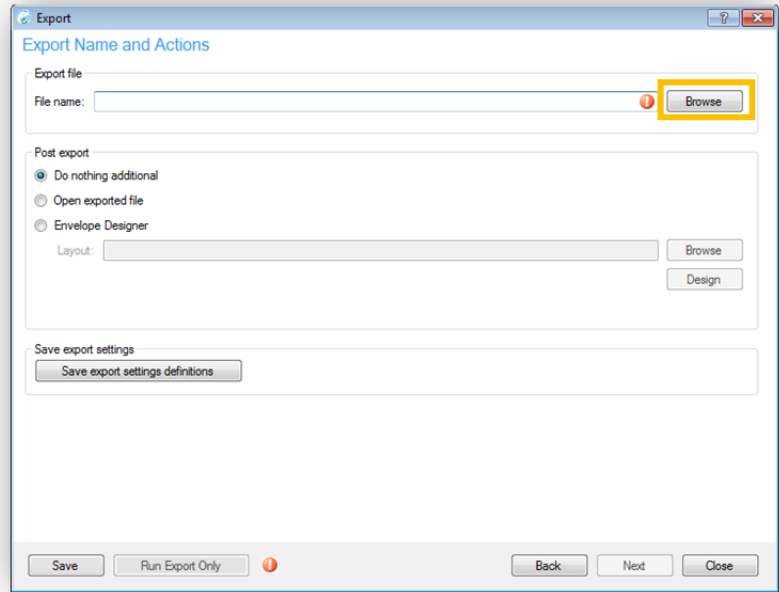


## ConnectRight™ Mailer Exporting a Mailing List

The Export Name and Actions screen will display.

From here you will be able to name your file and choose where to save it

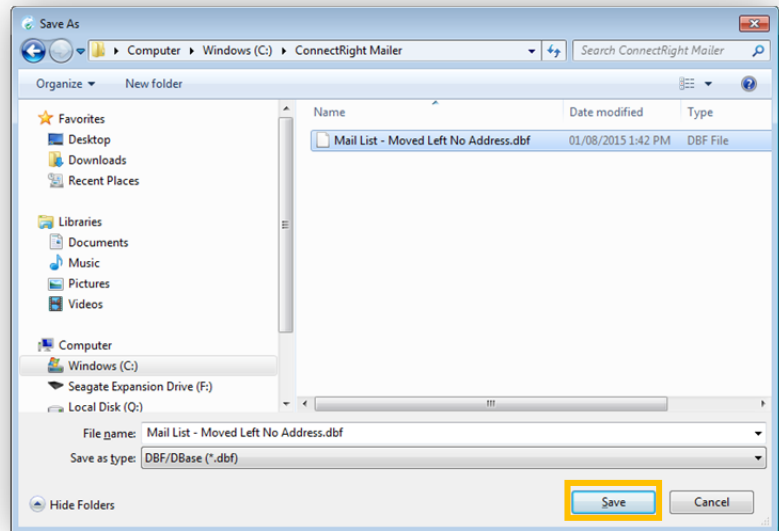
- 19 Select 'Browse' to choose the location you would like to save your file.



Select the location to save your mail list and enter a name for the file.

It is not necessary to add a file type extension. ConnectRight Mailer will add that for you.

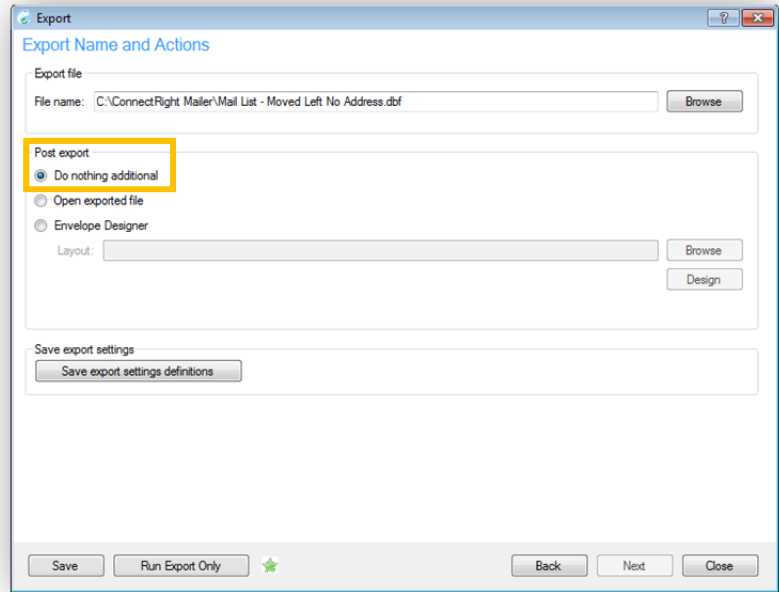
- 20 When you have selected a location and entered the file name, click "Save".



## ConnectRight™ Mailer Exporting a Mailing List

21

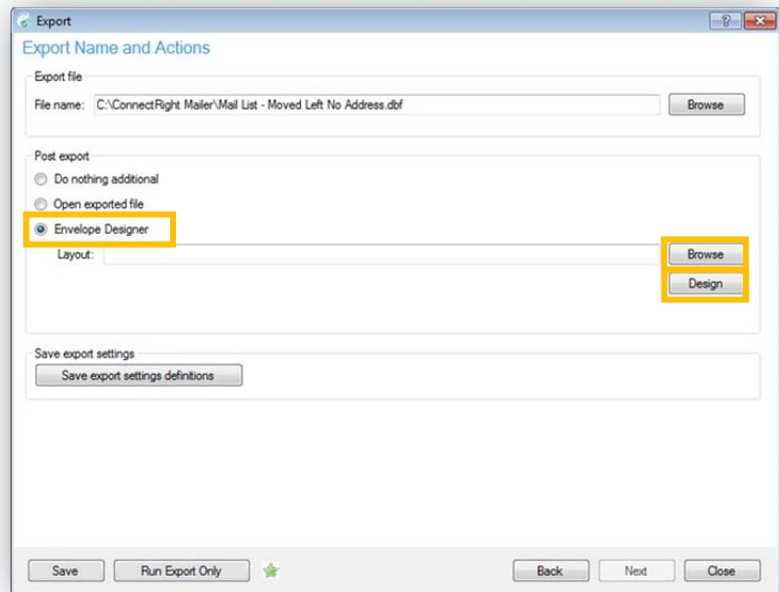
For the post export options, if you select "Do nothing additional", your list will process and save where indicated.



22

If you would like to print your list with Envelope Designer, select the Envelope Designer option in Post export. Browse to your envelope or label layout or select Design to create a new layout.

Finally, select "Run Export Only" to begin exporting your list.



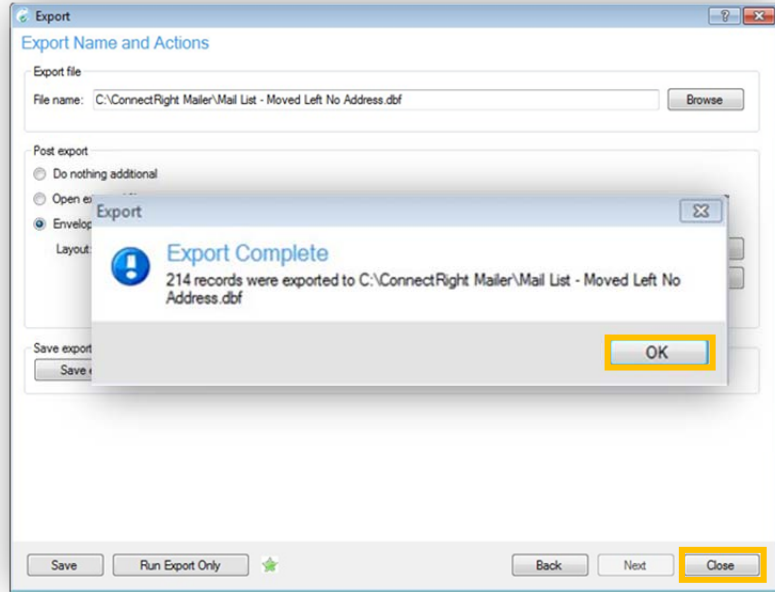
# ConnectRight™ Mailer Exporting a Mailing List

23

Once complete, ConnectRight Mailer will confirm your list has been successfully exported. If you selected Envelope Designer as a Post export option, your mail list will open in Envelope Designer.

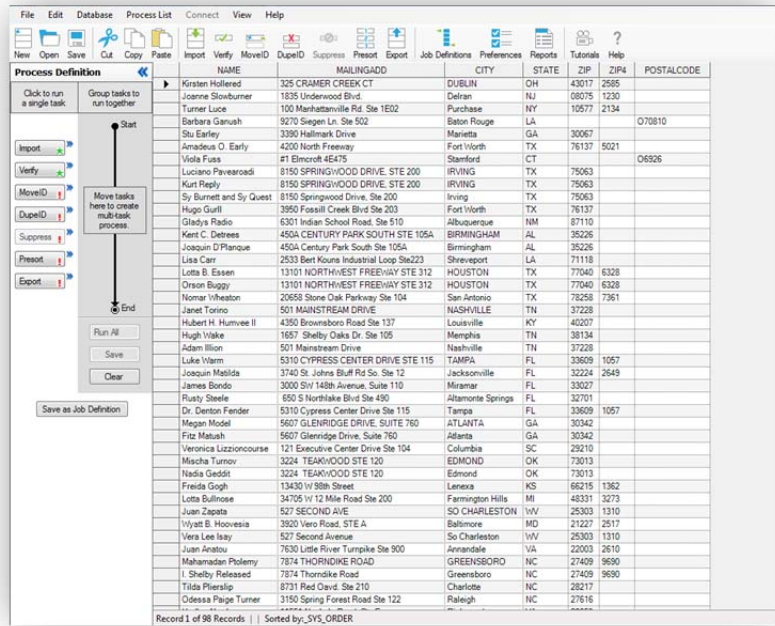
Click OK.

Then click Close to exit the Export Name and Actions screen.



24

Your mail list is exported and now ready for use.



NOTES: