WCM-Plus Quick Start Guide – Version 12.0

Installation

Installation Requirements

- You must have administrative rights on your computer prior to installing WCM-Plus.
- Recommended screen resolution is 800 x 600.

System Minimum Requirements

- Compatible with all Windows Operating System platforms and Microsoft Word/WordPerfect processor applications
- .NET Framework 2.0 (or higher)
- MDAC 2.8

Installation Instructions

1. Using your internet browser, go to http://www.walzpostal.com/postage-update.
2. Click on the installation option for your operating system (32-bit or 64-bit).
3. The first **WCM-Plus End-User License Agreement** window displays. Click on the check box for **I agree to the license terms and conditions** and click **Install.**
4. If .NET Framework 2.0 (or later) is not detected on your computer, you'll be prompted to install it. Click **Yes** to install.
5. Read through the .NET Framework 2.0 License Agreement and click **I Agree**. This version of .NET Framework must be installed with WCM-Plus.
6. The WCM-Plus installation begins.
7. WCM-Plus checks for older versions of the application and automatically uninstalls them. Click **Install**.
8. Click **Finish** to exit the setup wizard.
9. The first **Setup WCM-Plus (Options)** window displays. Click **Next** to enable installation of the Word/WordPerfect macro.
10. The second **Setup WCM-Plus (Options)** window displays. Click **Next**.
11. The third **Setup WCM-Plus (Options)** window displays. Click **Next**.
12. WCM-Plus displays a warning message that Microsoft Word will be closed.
13. Click **OK**. The install for WCM-Plus options begins.
14. WCM-Plus notifies you that the install for WCM-Plus options was successful.
15. Click **Finish** to complete the installation. The setup tool displays a message, indicating that the setup was successful.
16. Click **Close** to exit the WCM-Plus setup tool.

Postage Update Message

WCM-Plus displays the following message the first time the application is opened and again when the software is opened on (or after) a postage rate update. Click **OK** to continue.
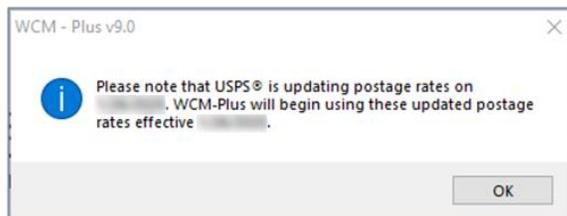

Figure 1: Postage Rate Increase Message

Getting Started

Accessing WCM-Plus

There are several ways to access WCM-Plus, which makes it versatile for both Word and WordPerfect users. The **W** icon displays:
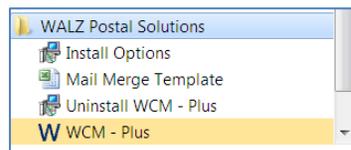
- In your Start menu:

Figure 2: Access to WCM Plus via Start Menu

- On your Windows desktop:

Figure 3: Access to WCM-Plus via Desktop Shortcut

- Within your preferred word processing program (Word or WordPerfect)

Customizing Default Settings

To customize WCM-Plus default settings:

1. Open WCM-Plus.
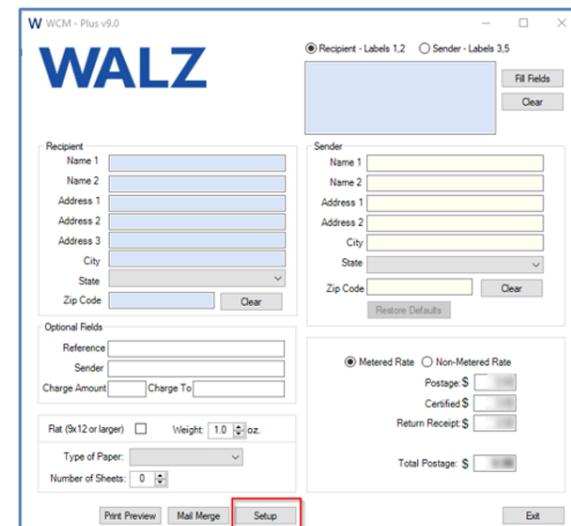2. Click on the **Setup** button or press **F9**.

Figure 4: Setup Button

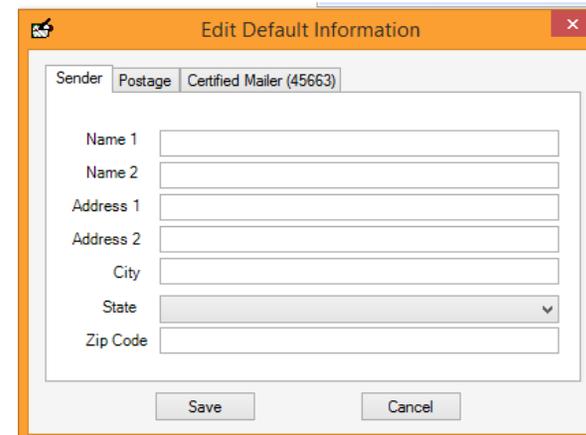3. The **Edit Default Information** window opens.

Figure 5: Edit Default Information

Sender Tab

This function gives you the ability to enter a sender address that displays as the default each time WCM-Plus is opened. You may also enter a new sender address from the main WCM-Plus window as needed without saving over the default.

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Figure 6: Edit Default Information – Sender Tab

Based on the values you enter on the **Sender** tab, WCM-Plus populates the default **Sender** fields on the right side of the main WCM-Plus window.

Figure 7: Main WCM-Plus Window – Default Sender Values

Postage Tab

This function allows you to set up a default postage profile and includes a postage calculator.

Figure 8: Edit Default Information – Postage Tab

Based on the values you enter on the **Postage** tab, WCM-Plus populates the default postage fields on the main WCM-Plus window.

Certified Mailer (45663)

This function enables you to easily make adjustments to label information, font size, and print margins for Certified Mailer (45663) forms.

Figure 9: Edit Default Information – Certified Mailer (45663)

- **Print Sender Label 2 with IMB:** Select this option to print a Sender address label that includes the intelligent Mail Barcode, used by USPS® for improved tracking of PS Form 3811 "Green Card" while enroute back to original sender.
- **Print Large Fonts:** This feature enables you to choose the size of the font printed on the mailer. Note that printing large fonts will restrict the amount of lines per label. Address 2 and Address 3 cannot be printed with large fonts.

- **Make this your default form type:** when selected, this is the default form for Mail Merge.
- **Disable Printing on Label 5:** If values are given for 'Charge Amount' and/or 'Charge To' fields, this information will be printed on Label 5. If aforementioned values are null, Sender address information will be printed on Label 5. When this checkbox is selected, nothing will be printed on Label 5.

Setting and Testing Margins

To assist you in setting up your print margins, WCM-Plus provides a Print Test Page feature.

1. Most printers will have **Top Margins** set between **60** and **65**, while **Left Margins** are set at **45**.
2. Set your margins and click **Save**.
3. To print a test page that generates dummy transactions with the newly-set margins, click **Print Test Page**.
4. If your sample print out appears too high on the label, increase your **Top Margin** settings. Likewise, if your sample print out appears too low on the label, decrease your **Top Margin** settings.
5. Note that as you decrease the **Left Margins**, all information entered moves to the left. As you increase the **Left Margins**, all information entered moves to the right.

When you have completed entering your default settings, click **Save**.

Printing a Single WALZ Mailer

Sender Information

There are multiple ways to insert recipient information into WCM-Plus, including:

- Data entry
- Word processing program icon
- Copy/paste
- Mail merge

Below are instructions for using the data entry method:

1. Starting from the left-side **Recipient** section of the main WCM-Plus window, fill in the following fields:
   a. **Name 1:** Enter the default contact name.
   b. **Name 2:** Enter the default company name. This field is optional.
   c. **Address 1:** Enter the street address, suite number, and/or building number.
   d. **Address 2:** Enter the street address, suite number, and/or building number. This field is optional. Note that this field is not available with the **Print Large Fonts** default selection.
   e. **Address 3:** Enter the street address, suite number, and/or building number. This field is optional. Note

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that this field is not available with the **Print Large Fonts** default selection.

    f. **City:** Enter the default city name.

    g. **State:** Select the default state by clicking on the drop-down arrow provided.

    h. **Zip Code:** Enter the default zip code. WCM-Plus always prints an IMb Tracing® barcode above the address. This barcode is used by the USPS® to help route mail more quickly. It is recommended that you enter a zip+4 (9-digit zip code).

    i. **Reference:** If desired, enter a reference number. This displays on Section C and the PS Form 3800 portions of the WALZ Certified Mailer under **Reference Information**.

    j. **Sender:** Enter an additional sender name if the sender is different from the sender fields filled in above (i.e., name of the person that prepared the Certified Mail). This field is optional.

    k. **Charge Amount:** If desired, enter a charge amount. This displays on Section B of the WALZ Certified Mailer for your records.

    l. **Charge To:** If desired, enter a name or account number that may incur internal billing charges. This displays on Section B of the WALZ Certified Mailer for your records.

2. Determine the postage.
3. Insert your WALZ Certified Mailer in the printer.
4. Click **Print**.
5. A preview screen opens, which gives you the opportunity to review the document for errors.
6. Click on the printer icon.
7. Select the desired print settings.
8. Click **OK**.
9. Your mailer is complete.

Using WCM-Plus Mail Merge Features

Mail Merge Database

WCM-Plus offers you the ability to upload an Excel file to perform a mail merge. Your spreadsheet must contain the following headers:

- **Name1:** Recipient contact name.
- **Name2:** Recipient company name. This field is optional.
- **Address1:** Recipient address.
- **Address2:** Recipient building, suite or apartment number. This field is optional.
- **Address3:** Recipient supplemental address line. This field is optional.
- **City:** Recipient city name.
- **State:** Recipient state (preferably in the 2-character abbreviated format).
- **Zip:** Recipient zip code (IMb Tracing® barcode requires a zip+4 format).
- **Reference:** Account, matter, or internal tracking number. This field is optional.

- **ChargeTo:** Name or account number of the party being charged for the postage and Certified Mail fees. This field is optional.
- **ChargeAmount:** Amount being charged to a party for the postage and Certified Mail fees. This field is optional.
- **Weight:** If the mail pieces are going to be different weights, this category will account for that in the postage detail. Blank or 1 in each row has the same effect on the postage calculation.
- **Sender:** Enter an additional sender name if the sender is different from the sender fields filled in above (i.e., name of the person that prepared the Certified Mail). This field is optional.
- **Flat: (9x12 or larger):** Use **1** for Flat; use **0** or leave the field blank for a non-Flat.

Note that the header definitions above are only suggestions. However, if you wish to import a particular field in the mail merge, you must use the exact heading titles as depicted above.

Mail Merge Tutorial

WALZ provides a sample template to help you construct your own. This sample template is used below to demonstrate how to use the WCM-Plus mail merge feature; however, you will need to replace this with your own data when performing a mail merge.

1. Open WCM-Plus.
2. If desired, make any necessary changes to the **Sender** default address.
3. Make any necessary adjustments using the postage calculator.
4. Click **Mail Merge**. Locate your template.
5. Insert the appropriate number of WALZ Certified Mailers into the printer.
6. Click **Print**.
7. A preview screen opens, which gives you the opportunity to review the document for errors.
8. Click on the printer icon.
9. Select the desired print settings.
10. Click **OK**.
11. Your WALZ Certified Mailers generated from the mail merge are now complete.

Additional Features

Refer to the *WCM-Plus User Guide* for information on the following topics:

- Accessing WCM-Plus using multiple methods (e.g., data entry, word processing icon, copy/paste, mail merge)
- Using the WCM-Plus mail merge feature
- Uninstalling WCM-Plus
- Frequently asked questions

The *WCM-Plus User Guide* is located at:
- **Windows 7 and Higher:** C:\Program Files (x86)\Walz\ WCMPlus
- **Windows XP:** C:\Program Files\Walz\WCMPlus

Technical Support

For questions about WCM-Plus or any other WALZ service, contact a WALZ Technical Support representative at (800) 882-3811 (Option 3) Monday – Friday, from 7:00 AM to 4:00 PM PT or via email at support@walzpostal.com.

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