

Using Stamps.com in TrialWorks

Version 11 and higher

Stamps.com automates the purchase and printing of postage electronically. Sign up for a corporate or single user account and add postage directly to your envelopes in TrialWorks.

Automatically add the cost of printed postage to the Costs tab.

Enter Credentials

If the firm has created a Multi-User corporate account complete the stamps.com Username and Password under the Global Settings > AddIns2 Tab

The screenshot shows the 'Global Settings (Main Office)' window with the 'AddIns (2)' tab selected. The 'Stamps.com Settings' section is highlighted with a green box. The 'User' field contains 'Corp' and the 'Password' field contains '*****'. Other sections include 'iManage Settings' and 'DocuSign Settings'.

Firm Settings	TW Registration / Upgrades	E-Mail/Fax Settings	Settlement Calculator
Formatting	Other Settings	AddIns	AddIns (2)

iManage Settings:

iManage Server:

iManAdmin:

iManPswd:

iManMatter:

iManClient:

DocuSign Settings:

User:

Password:

Stamps.com Settings:

User:

Password:

Create New Office Close Delete Current Office

Record: 1 of 8 No Filter Search

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<http://www.trialworks.com>
training@trialworks.com



If the firm has a single user account, complete the Stamps.com Username and Password under the User Defaults > Defaults Value > Other

SET DEFAULT VALUES

PLEASE SELECT THE FOLLOWING TRIALWORKS SYSTEM WIDE DEFAULTS FOR THIS USER

OK

User Settings and Help | Case List Filters | Template Settings | Calendar and Contact Settings | Global Settings (Read Only) | **Other**

iManage Settings:
 User:
 Password:
 Use Windows Authentication

Auto Terminate msaccess.exe Settings:
 Delay in seconds:
 The current msaccess.exe process will be automatically terminated (30) seconds after TrialWorks closes

DocuSign Settings:
 User:
 Password:

* Enter user/password in Global Settings.

Document Versioning:
 Compare Tool Command:
 Command must include the variables <Doc1> and <Doc2>. TrialWorks will replace those variables with the actual path to the documents being compared
 EXAMPLE:
 "C:\Program Files\Workshare\Compare\DeltaVw.exe" /original="<Doc1>" /modified="<Doc2>"
 * Leave blank to use Microsoft Word as the compare tool.

Stamps.com Settings
 User:
 Password:

Whether signing up for a multi-user Corporate Account or single user account, you need to enable TrialWorks to use Stamps.com. Under User Default > Default Values > User Settings, check the box to Use Stamps.com. You can also choose to Add to the Costs Tab.

SET DEFAULT VALUES

PLEASE SELECT THE FOLLOWING TRIALWORKS SYSTEM WIDE DEFAULTS FOR THIS USER

OK

User Settings and Help | Case List Filters | Template Settings | Calendar and Contact Settings | Global Settings (Read Only) | Other

WP-WORD: Office Location:

Author: Sort Order:

Bar ID: Envelope Tray:

Letter Punctuation:
 Use Stamps.com
 Add Postage to cost

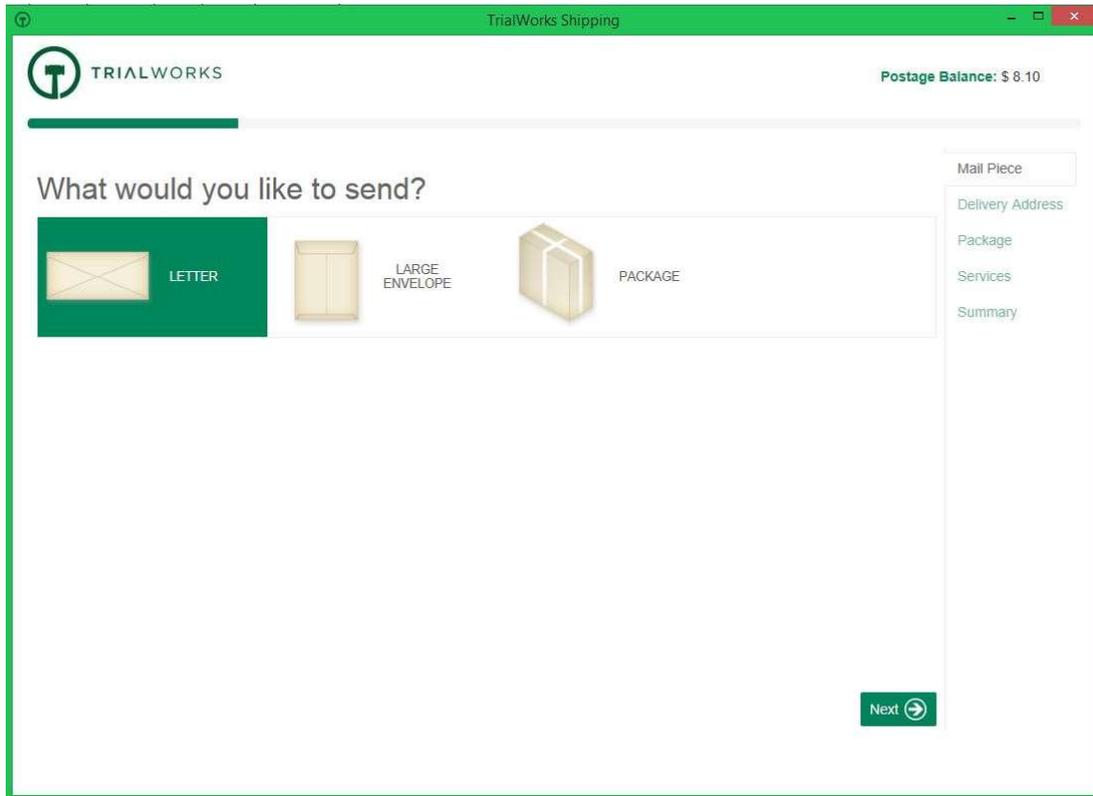
Typist:
 TAPI Extension:



Printing Envelopes

Once Stamps has been enabled whenever you choose to print an envelope will default to utilize the TrialWorks Shipping Application

- Choose the type of package you need to ship.



- Choose the Delivery Address for the Recipient.

The screenshot shows the 'TrialWorks Shipping' application window. At the top left is the TrialWorks logo and the text 'TRIALWORKS'. At the top right, it says 'Postage Balance: \$ 8.10'. The main heading is 'Who would you like to send to?'. Below this is a table with columns: Contact Name, ATTN, Label, Address, City, State, and ZipCode. The first row is highlighted in green and contains the following data:

<input checked="" type="checkbox"/>	Contact Name	ATTN	Label	Address	City	State	ZipCode
<input checked="" type="checkbox"/>	TrialWorks Case Management Software		Mailing	1550 Madruga Avenue Suite 580	Coral Gables	FL	33146

On the right side, there is a vertical sidebar with the following options: Mail Piece, Delivery Address (highlighted), Package, Services, and Summary. At the bottom of the window, there are 'Previous' and 'Next' navigation buttons.

- Confirm the Shipping Address is confirmed to USPS Standards if requested

The screenshot shows a dialog box titled 'Standardized Address by USPS'. Below the title, it asks 'Please confirm standardized address or keep original?'. There is a table with two rows:

Type	Address
<input type="radio"/> Original	TrialWorks Case Management Software 1550 Madruga Avenue Suite 580 Coral Gables, FL, 33146
<input checked="" type="radio"/> Standardized	TRIALWORKS CASE MANAGEMENT SOFTWARE 1550 MADRUGA AVE STE 580 CORAL GABLES, FL, 33146

At the bottom right of the dialog box is a green 'Next' button.



- Customize your mailing if weight changes or a different shipping date applies

The screenshot shows a web application window titled "TrialWorks Shipping". The interface includes a header with the TrialWorks logo and a "Postage Balance: \$ 8.10". The main content area is titled "Customize your letter" and features a "Letter" icon. Below this, there are four input fields: "Mailing Date" (10/27/2017), "Weight Lbs" (0.00), "Weight Oz" (1.00), and "Print On" (Envelope - #10, 4 1/4" x 9 1/2"). A sidebar on the right contains a vertical menu with options: "Mail Piece", "Delivery Address", "Package", "Services", and "Summary". At the bottom right of the form, there are "Previous" and "Next" navigation buttons.



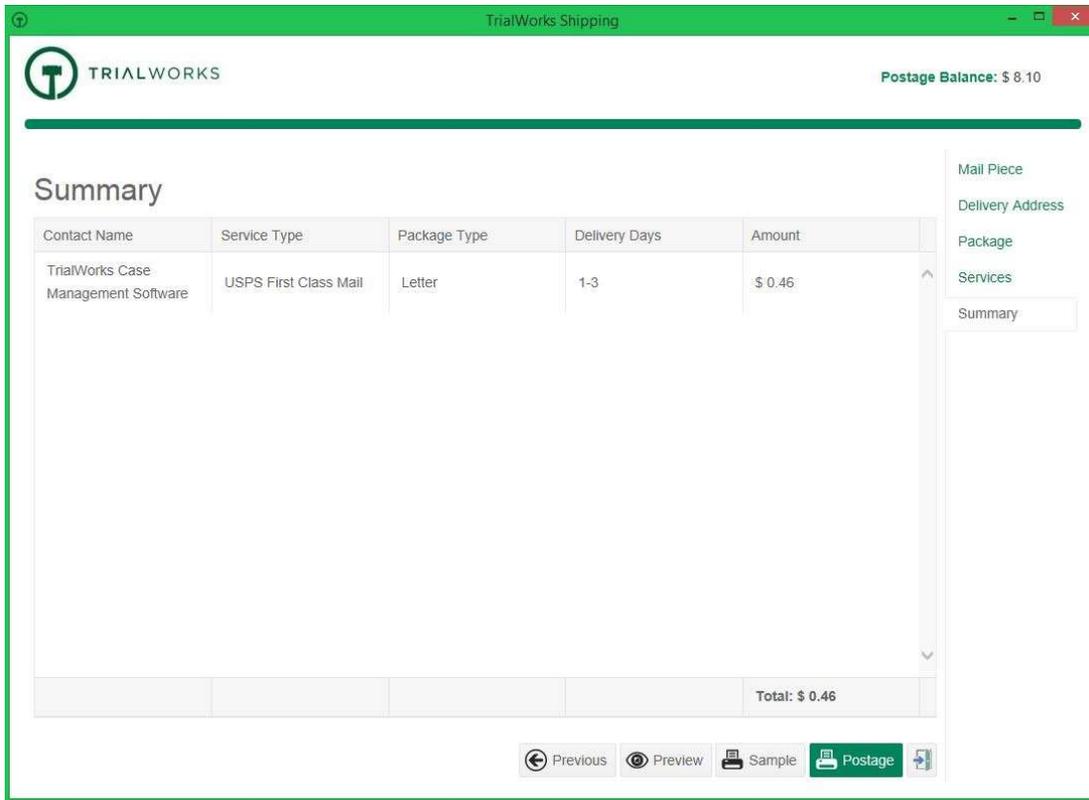
- Choose any additional delivery services necessary for shipping.

The screenshot shows the 'TrialWorks Shipping' application window. At the top left is the TrialWorks logo. At the top right, it displays 'Postage Balance: \$ 8.10'. The main heading is 'Choose delivery speed & cost'. Below this is a table with four columns: Service Name, Package Type, Delivery Days, and Amount. Three rows are visible, each with a radio button for selection. The first row is selected. To the right of the table is a vertical sidebar with menu items: Mail Piece, Delivery Address, Package, Services, and Summary. At the bottom of the table area are 'Previous' and 'Next' navigation buttons.

	Service Name	Package Type	Delivery Days	Amount
<input checked="" type="radio"/>	USPS First Class Mail	Letter	1-3	\$ 0.46
<input type="radio"/>	USPS Priority Mail	Letter	1-3	\$ 6.65
<input type="radio"/>	USPS First Priority Mail Express	Letter	1-2	\$ 23.75



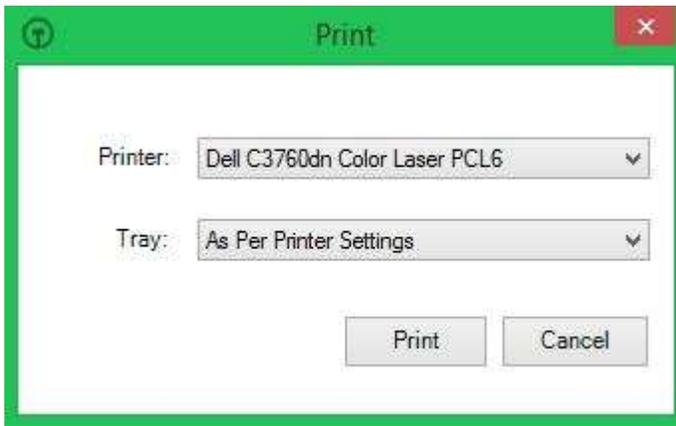
- Confirm the shipping options and click Postage. This will print the envelope for the Recipient.



- If you would like to Preview the printed envelope click Preview



- You can choose the printer and tray to print your envelope. Verify that the printer chosen has envelope printing capabilities.



NOTE: If you receive an Authentication Error when launching the envelope, the Username or Password has been entered incorrectly. Update those fields before attempting to print the envelope.

