

MailXstream Client User Guide

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What is MailXstream?

MailXstream is a cloud-based print-to-mail platform that enables organizations to automate their business mail directly from their desktop. By transforming traditional mailing from a manual, time-consuming process into an efficient automated workflow, MailXstream helps you:

- **Save Time** — Streamline mail processes by submitting documents electronically.
- **Reduce Costs** — Decrease printing, postage, and labor expenses through automation and postal optimization.
- **Simplify Workflows** — Centralize mailing operations with a single, easy-to-use platform.
- **Ensure Security** — Protect sensitive documents with secure, cloud-based processing.
- **Maintain Compliance** — Generate Certificates of Mailing (COM) for proof of delivery.

Whether you're sending invoices, statements, notices, or other business-critical correspondence, MailXstream handles the printing, inserting, and mailing so you can focus on your core business.

About This Guide

Purpose

This guide provides comprehensive instructions for using MailXstream as a Client user. It covers all features available to client organizations, from creating mail orders to managing account information and generating compliance documentation.

Intended Audience

This guide is intended for all Client users of MailXstream. Depending on your assigned role, you will have access to different features:

Role	Description
User	Submit orders for printing and mailing, and monitor order status through completion
Monitor	View and track order status in read-only mode without the ability to create or modify orders
Manager	Full order management capabilities plus access to accounting information, statements, and payment options
Admin	All Manager capabilities plus the ability to create, modify, and manage users and their access levels within your organization

Note: If you are a Printer operator or Partner administrator, please refer to the [Printer User Guide](#) or [Partner Admin Guide](#) respectively.

Prerequisites

Before using MailXstream, ensure you have:

- A valid MailXstream user account (provided by your administrator).
- A modern web browser (Chrome, Firefox, Safari, or Edge).
- Access to your organization's MailXstream account.
- Documents ready for mailing in PDF format.

Quick Start

For users who want to get started immediately, follow these essential steps:

Create Your First Order in 5 Steps

1. **Log in** to MailXstream using your User ID and password
2. **Click** the **Orders** item in the left menu
3. **Click** the + (Create Order) button
4. **Select** a template, enter an order name, and upload your document
5. **Click Submit** to send your order for processing

For detailed instructions, see [Creating a New Order](#) in the Managing Orders section.

Key Areas of MailXstream

Area	What You Can Do	Navigation
Dashboard	Monitor order activity and view metrics	Left menu → Dashboard
Orders	Create, view, and manage mail orders	Left menu → Orders
Account Info	View balance, payments, and statements	Left menu → Account Info
Order Templates	Browse available mailing configurations	Left menu → Order Templates
User Resources	Access tools and downloadable resources	Left menu → User Resources

Getting Started

This section walks you through accessing MailXstream and understanding the main interface.

Logging In

To access MailXstream:

Step 1. Open your web browser and navigate to your organization's MailXstream portal URL.

Step 2. Enter your **User ID** in the username field.

Step 3. Enter your **Password**.

Step 4. Click the **Sign In** button.



Figure 1: The MailXstream login screen

Tip: Your User ID is a username assigned by your administrator.

Password Recovery

If you cannot access your account:

Forgot your password?

1. Click **Forgot password?** on the login screen.
2. Enter your User ID.
3. Check your registered email for a password reset link.
4. Click the link and create a new password.

Forgot your User ID?

1. Click **Forgot User ID?** on the login screen.
2. Enter your registered email address.
3. Your User ID will be sent to that email address.

Note: If you don't receive the email within a few minutes, check your spam folder. Contact your administrator if issues persist.

Dashboard Overview

After logging in, you'll see the **Dashboard**—your central hub for monitoring mail activity.

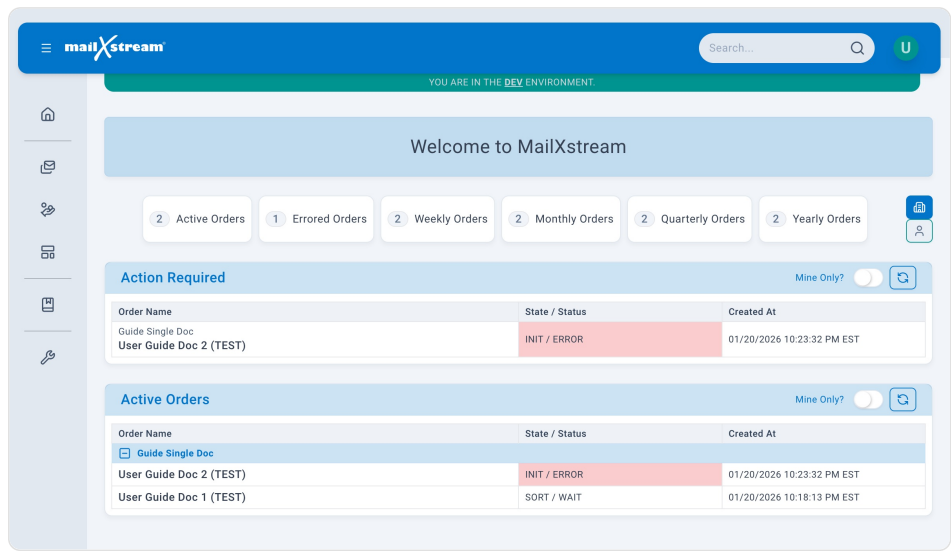


Figure 2: The Client Dashboard showing key metrics and recent activity

Dashboard Components

The Dashboard is organized into distinct sections:

Section	Description	Actions Available
Action Required	Orders needing your attention (errors or pending approval)	Click to view order details
Active Orders	Orders currently in processing	Click to view order details
Metrics Panel	Statistics showing order counts by status and time period	View counts for active, error, weekly, monthly, quarterly, and yearly orders
System Announcements	Important messages from your administrator	Read-only notifications

Filtering the Dashboard

Use the **My Orders Only** toggle in the top-right area to control what you see:

Toggle State	What You See
On (enabled)	Only orders you personally created
Off (disabled)	All orders for your entire organization

Tip: The dashboard automatically refreshes every 60 seconds. You can also manually refresh by pressing **F5** or clicking your browser's refresh button.

Navigation

The main navigation menu is located on the left side of the screen and provides access to all MailXstream features.

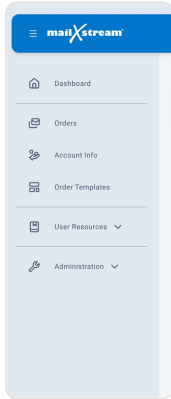


Figure 3: The main navigation sidebar

Main Menu Items

Menu Item	Description	Who Can Access
Dashboard	Return to the main dashboard overview	All users
Orders	View, create, and manage mail orders	All users
Account Info	View billing, balance, and payment options	Managers and Admins
Order Templates	Browse available order templates	All users
User Resources	Access tools, documents, and helpful links	All users
Administration	Access to User Management Tools	Admins

Top Navigation Bar

The top bar provides quick access to:

- **Search** — Search for orders by name or ID.
- **User Menu** (your name) — Access profile, password reset, help, and logout options.

Managing Orders

Orders are the core of MailXstream. This section covers everything you need to know about creating, tracking, and managing your mail orders.

Understanding the Orders Page

To access the Orders page:

1. Click **Orders** in the left navigation menu

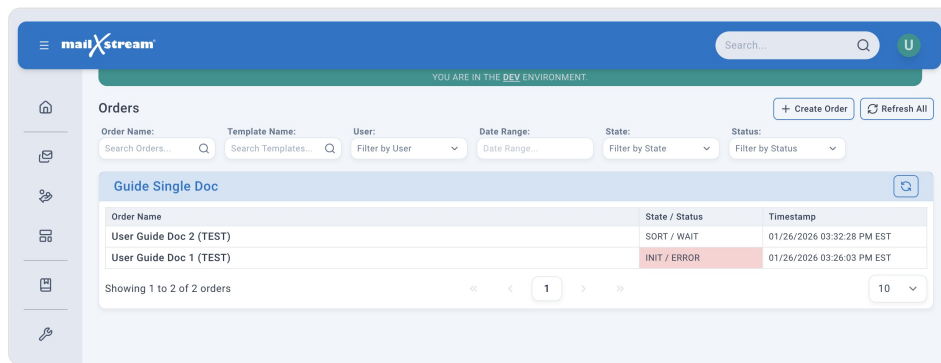


Figure 4: The Orders page showing orders grouped by template

Page Layout

The Orders page displays your orders organized by template. Each template section shows:

- Template name and description.
- List of orders using that template.
- Order status indicators.
- Quick action buttons.

Filtering Your Orders

Use the filter controls at the top of the page:

Filter	Options	Purpose
Order Name	Free text	Show orders where the name or id contains the entered text
Template Name	Free text	Show orders where the template name or id contains the entered text
User	All users in the client	Show orders submitted by the given user
State	Create, Init, Segment, Sort, Print, Insert, Mail, Complete, Cancelled, Deleting	Show orders with a specific state
Status	Init, Wait, Run, Queued, Complete, Error, Cancelled, Purged	Show orders in specific status
Date Range	Custom Range	Limit orders to a time period

Tip: Combine filters to quickly find specific orders. For example, set Status to "Error" and Date Range to "This Week" to see recent problem orders.

Viewing Order Details

Click on any order to view its complete details.

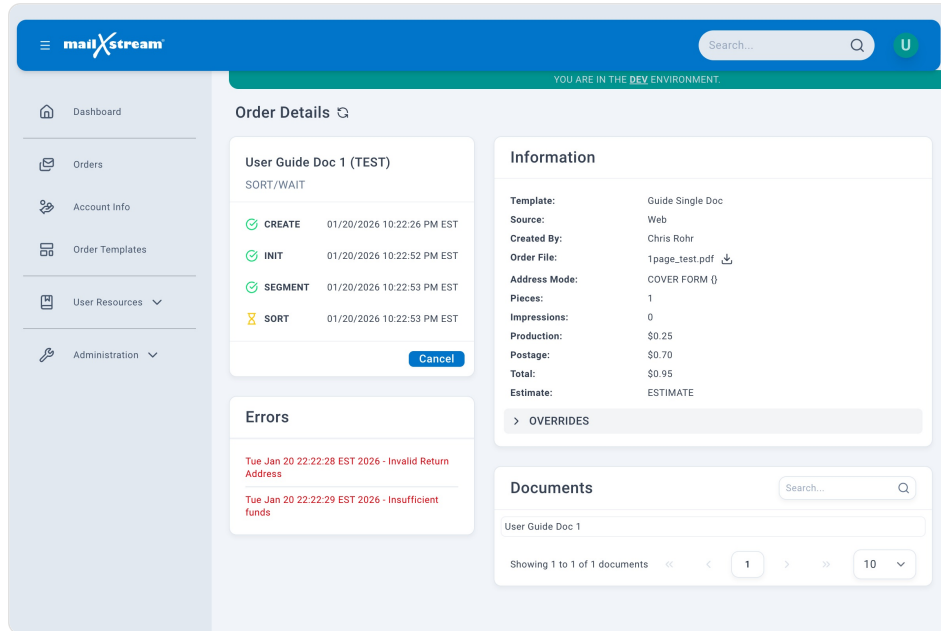


Figure 5: Detailed view of a single order showing status and documents

Order Detail Sections

Section	Information Displayed
Status	Order name, Current state/status, State/status history, Available actions
Information	Information about the order including who submitted it, the uploaded file, how many pieces and impressions were found, cost for the order, override values, and inserts
Documents	List of all documents successfully processed
Errors	Any errors that occurred (if applicable)
Errored Documents	List of all documents that failed

Available Actions

Depending on the order's status, you may see these action buttons:

Action	Description	When Available
Cancel Order	Cancel the order	When in Wait status
Submit Order	Push the order through to the next state	When order needs intervention
Generate COM	Create Certificate of Mailing	After mailing is complete

Creating a New Order

Follow these steps to submit a new mail order.

Step 1: Start the Order Creation

1. Navigate to the **Orders** page
2. Click the **+** (Create Order) button in the top-right corner
3. The order creation wizard will open

The screenshot shows the 'mailXstream' application interface. At the top, there is a navigation bar with the logo, a search bar, and a user profile icon. Below the navigation bar is a sidebar with several icons representing different sections of the application. The main content area displays a 'New Order' form. The form has a title 'New Order' and a sub-header 'To start off, please select your template for this order and give your order a name. This name must be unique. It will be used to reference the order, to check status and in notification emails.' Below this are two input fields: 'Template:' with a dropdown arrow and 'Name:' with a text input. At the bottom right are 'Cancel' and 'Next' buttons.

Figure 6: Step 1 — Selecting a template and entering the order name

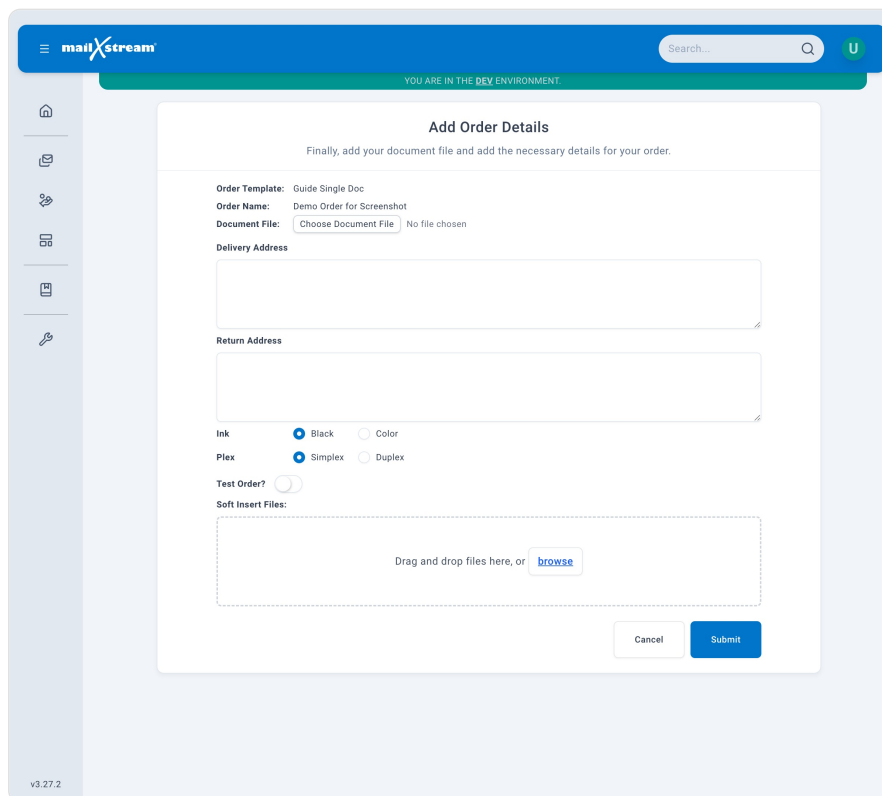
Step 2: Select Template and Name

1. **Select a Template** — Choose from the dropdown list of available templates. Each template defines the paper, envelope, and mailing configuration.
2. **Enter Order Name** — Provide a unique, descriptive name for your order.

Tip: Use a naming convention like `YYYY-MM-DD_Description` for easy identification (e.g., `2026-01-21_January_Invoices`).

3. Click **Next** to proceed.

Step 3: Configure and Upload



The screenshot shows the 'Add Order Details' form in the mailXstream application. The form is titled 'Add Order Details' and includes a sub-header 'Finally, add your document file and add the necessary details for your order.' The form contains the following fields and options:

- Order Template:** Guide Single Doc
- Order Name:** Demo Order for Screenshot
- Document File:** Choose Document File | No file chosen
- Delivery Address:** Text input field
- Return Address:** Text input field
- Ink:** Black Color
- Plex:** Simplex Duplex
- Test Order?:**
- Soft Insert Files:** Drag and drop files here, or [browse](#)

At the bottom of the form, there are 'Cancel' and 'Submit' buttons. The application header shows 'mailXstream' and 'YOU ARE IN THE DEV ENVIRONMENT.' The version number 'v3.27.2' is visible in the bottom left corner.

Figure 7: Step 3 — Uploading documents and configuring order options

1. **Upload Your Document** — Click the upload area or drag and drop your file(s).

Supported format: Only PDF documents are supported.

2. **Configure Override Options** (if available) — Some templates allow you to customize settings for a specific order:

Option	Description
Delivery Address	Override the recipient address
Return Address	Override the return address
Ink	Choose Black or Color printing
Plex	Choose Simplex (single-sided) or Duplex (double-sided)
Test Order	Mark as a test (won't be mailed)
Soft Inserts	Select content to merge into documents

3. **Review** — Verify all settings are correct.
4. **Click Submit** — Send the order for processing.

Important: Once an order is submitted and processing begins, it cannot be modified. Double-check all details before clicking Submit.

Understanding Order States and Statuses

Orders progress through a series of processing stages. Each order has both a **State** (current processing stage) and a **Status** (condition within that stage). Understanding these helps you track your orders effectively.

Order States

The State indicates which processing stage an order is currently in:

State	Stage	Description
Create	1	Order is being created, awaiting file upload
Init	2	Order initialized, preparing for processing
Segment	3	Documents being extracted and validated
Sort	4	Documents being sorted for optimal postal rates
Print	5	Documents sent to the print facility
Insert	6	Documents being inserted into envelopes
Mail	7	Printed items delivered to postal service
Complete	8	Order fully processed and mailed
Cancelled	—	Order was cancelled by user
Deleting	—	Order is being purged from the system

Order Statuses

The Status indicates the condition of an order within its current state:

Status	Meaning
Init	Stage is initializing
Wait	Waiting for action, approval, or resources
Run	Actively being processed
Queued	Waiting in queue for processing
Complete	This stage completed successfully
Error	An error occurred requiring attention
Cancelled	Processing was cancelled
Purged	Order data has been removed from the system

State and Status Progression

A typical successful order progresses through states as follows:

Create → Init → Segment → Sort → Print → Insert → Mail → Complete

Within each state, the status typically progresses:

Init → Queued → Run → Complete

Cancelling an Order

You can cancel an order if processing hasn't progressed too far.

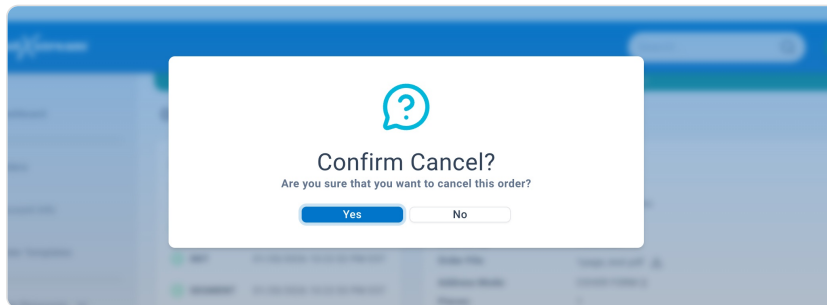


Figure 8: The cancel order confirmation dialog

To cancel an order:

- Step 1.** Navigate to the order details page.
- Step 2.** Click the **Cancel** button.
- Step 3.** Confirm the cancellation when prompted.

When Can Orders Be Cancelled?

Order State	Can Cancel?
Create	✓ Yes
Init	✓ Yes
Segment (Wait or Error status)	✓ Yes
Sort (Wait or Error status)	✓ Yes
Print or later	✗ No — printing has begun
Complete	✗ No — already mailed

Warning: Once an order enters the Print, Insert, or Mail state, it cannot be cancelled because printing has begun. Contact support immediately if you need to stop an in-progress order. Phone support is fastest: 1-877-365-MAIL (6245).

Downloading Documents

MailXstream allows you to download various files associated with your orders.

Available Downloads

File Type	Description	How to Download
Input File	The original document you uploaded	Order Details → Download Input File
Individual Documents	Processed documents ready for mailing	Order Details → Documents section → Click download icon
Certificate of Mailing	Proof of mailing for compliance	Order Details → Generate COM → Download COM

To download the input file:

1. Go to the order details page.
2. Click **Download Input File**.
3. The file will download to your browser's default download location.

Generating a COM

A COM provides official proof that your documents were submitted to USPS. This is essential for compliance and legal documentation requirements.

To generate a COM:

- Step 1.** Navigate to the completed order details page.
- Step 2.** Click **Generate COM**.
- Step 3.** Wait for generation to complete (status will update).
- Step 4.** Click **Download COM** to save the PDF.

Note: COM generation requires the order to be in `MAIL` or `COMPLETE` status. Generation may take a few moments for large orders.

The COM PDF includes:

- Order information and dates.
- List of all mailed documents.
- USPS acceptance confirmation.
- Unique certificate number for reference.

Order Templates

Templates define how your mail pieces are configured. Understanding templates helps you select the right one for each mailing.

Understanding Templates

An order template is a pre-configured set of mailing specifications. Your administrator creates templates that match your organization's common mailing needs.

Template Components

Component	Description	Examples
Paper Type	The paper stock for printing	Standard 20 lb, Premium 24 lb, Cardstock
Envelope Type	The envelope for mailing	#10 Standard, 6x9, Flat
Ink	Printing color mode	Black & White, Full Color
Plex	Printing sides	Simplex (1-sided), Duplex (2-sided)
Mail Class	USPS mail class	First-Class, Marketing Mail, Priority
Sort Type	Postal sorting for discounts	Presort First-Class, Automation
Address Mode	Where addresses appear	Window (shows through envelope), Printed on envelope
Return Address	Your organization's address	Pre-configured by administrator
Hard Inserts	Physical inserts included	Marketing flyers, Return envelopes
Archive Duration	How long documents are retained	30 days, 90 days, 1 year

Viewing Available Templates

To browse your available templates:

Step 1. Click **Order Templates** in the left navigation menu.

Step 2. Browse the list of templates configured for your organization.

Step 3. Click any template to view its full configuration details.

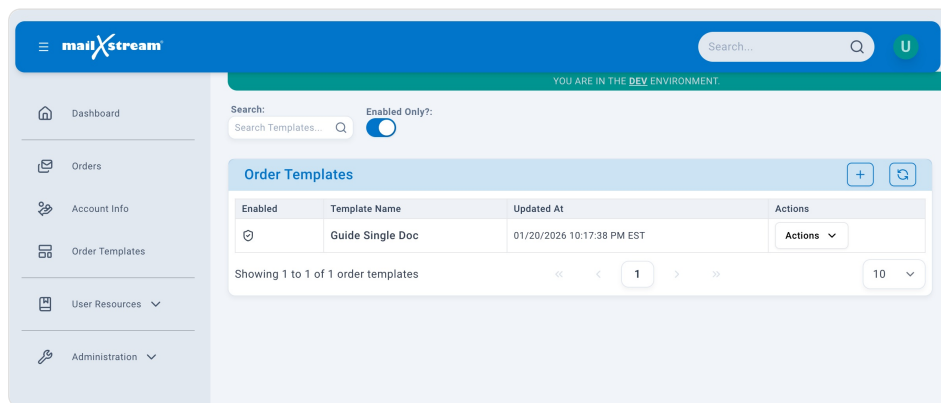


Figure 9: List of available order templates with configuration details

Note: Templates are configured by your administrator. If you need a new template or changes to an existing one, contact your administrator with the specifications you require.

Account Management

This section covers billing, payments, and account information. Access to these features may be restricted based on your user role.

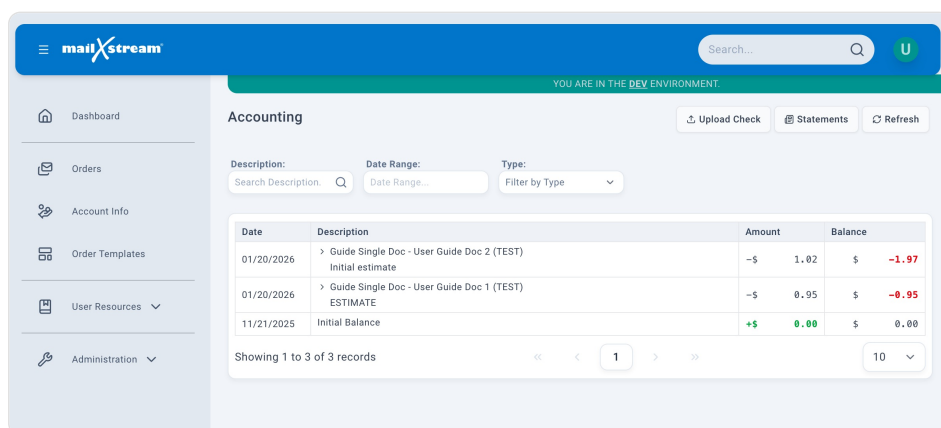
Note: Account management features are available to users with Manager or Admin roles. If you don't see these options, contact your administrator.

Viewing Account Balance

To view your account information:

Step 1. Click **Account Info** in the left navigation menu.

Step 2. View the account overview showing current balance and recent activity.



The screenshot shows the mailXstream Accounting interface. The left sidebar contains navigation options: Dashboard, Orders, Account Info, Order Templates, User Resources, and Administration. The main content area is titled 'Accounting' and includes search filters for Description, Date Range, and Type. Below the filters is a table with columns for Date, Description, Amount, and Balance. The table shows three records: two charges on 01/20/2026 and one initial balance on 11/21/2025. The current balance is \$ 0.00.

Date	Description	Amount	Balance
01/20/2026	> Guide Single Doc - User Guide Doc 2 (TEST) Initial estimate	-\$ 1.02	\$ -1.97
01/20/2026	> Guide Single Doc - User Guide Doc 1 (TEST) ESTIMATE	-\$ 0.95	\$ -0.95
11/21/2025	Initial Balance	+\$ 0.00	\$ 0.00

Figure 10: Account overview showing balance and charges

Account Overview Components

Section	Information Displayed
Current Balance	Amount owed or credit available
Recent Charges	Transaction history with dates and amounts
Payment Status	Status of any pending payments

Understanding Charges

Your account is charged for various services:

Charge Category	Description
Production	Printing, processing, and handling charges
Postage	USPS postage for each mail piece
Rebate	Postal discounts earned through presorting (shown as credits)
Total	Net amount for the period

Tip: Larger mailings typically earn greater postal rebates through presorting. Ask your administrator about presort optimization for high-volume mailings.

Payment Options

MailXstream accepts multiple payment methods.

To view payment options:

Step 1. Go to **Account Info**.

Step 2. Click **Payment Options**.

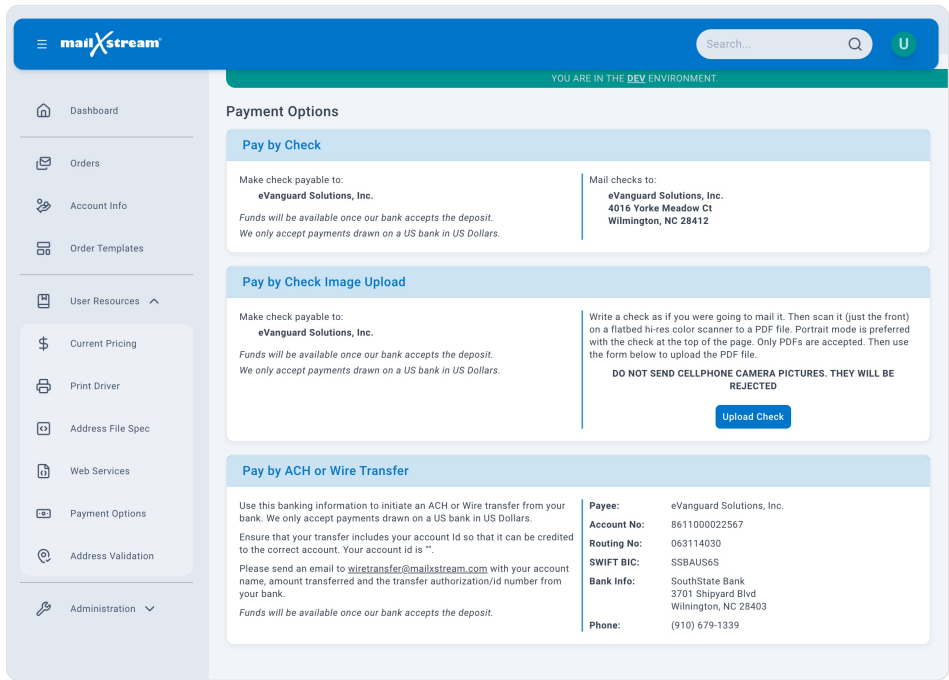


Figure 11: Available payment methods and instructions

Available Payment Methods

Method	Description	Processing Time
Check	Mail a check to the provided address	5-7 business days
ACH Transfer	Electronic bank transfer	2-3 business days
Wire Transfer	Direct wire payment	1-2 business days
Check Upload	Upload an image of your check	1-2 business days

Uploading Payment Checks

For faster payment processing, you can upload an image of your check.

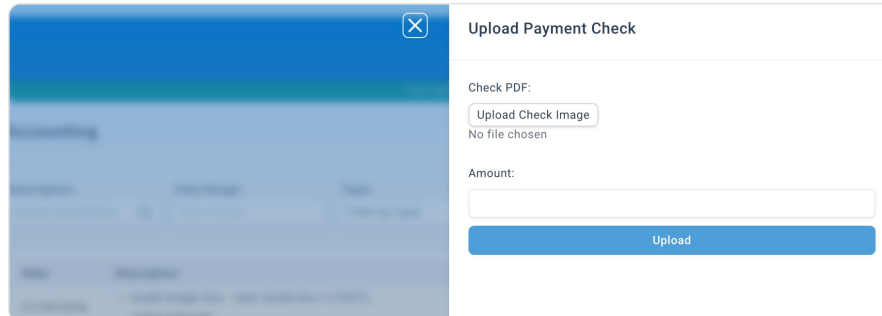


Figure 12: Check upload interface

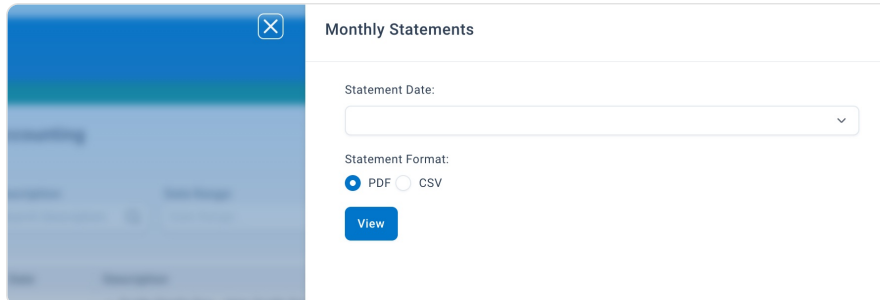
To upload a check payment:

- Step 1.** Go to **Account Info**.
- Step 2.** Click **Upload Check**.
- Step 3.** Click to select or drag and drop your check image file.
 - Supported formats: PDF.
 - Ensure the image is clear and all details are legible.
- Step 4.** Enter the check amount and any reference notes.
- Step 5.** Click **Upload** to submit.

Your payment will be reviewed and applied to your account. You can view the status of uploaded checks in the Payments section.

Downloading Statements

Account statements provide detailed records of all charges and payments.



The screenshot shows a web interface titled "Monthly Statements" with a close button (X) in the top left corner. Below the title, there is a "Statement Date:" label followed by a dropdown menu. Underneath, the "Statement Format:" section has two radio button options: "PDF" (which is selected) and "CSV". A blue "View" button is located at the bottom of the form.

Figure 13: Statement download options

To download a statement:

- Step 1.** Go to **Account Info**.
- Step 2.** Click **Statements**.
- Step 3.** Select the statement period (month/year).
- Step 4.** Choose the format:
 - **PDF** — Formatted for printing and records
 - **CSV** — For import into spreadsheets
- Step 5.** Click **Download**.

Tools and Utilities

MailXstream provides additional tools to help you prepare and submit mail orders.

Address Validation

The address validation tool verifies delivery addresses against the USPS database before you submit orders.

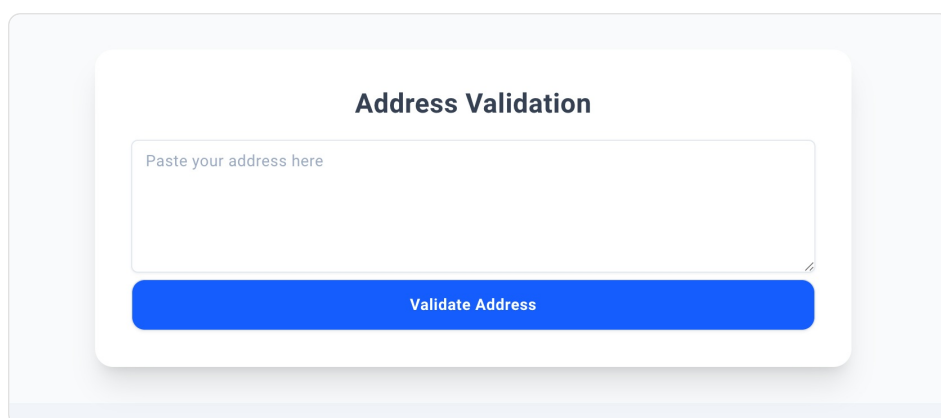
The image shows a screenshot of a web application interface for address validation. It features a white rectangular box with rounded corners and a subtle drop shadow. At the top center of the box is the title "Address Validation" in a bold, dark blue font. Below the title is a large, empty text input field with a light gray border and a small cursor icon at the bottom right. Inside the input field, the placeholder text "Paste your address here" is visible in a light gray font. Below the input field is a prominent blue button with rounded corners and white text that reads "Validate Address".

Figure 14: Address validation tool showing standardized results

To validate an address:

Step 1. Navigate to **User Resources** in the left menu.

Step 2. Click **Address Validation**.

Step 3. Enter the address to validate:

- Street Address.
- City.
- State.
- ZIP Code.

Step 4. Click **Validate**.

Step 5. Review the results.

Validation Results

The address validator provides:

Result	Description
Standardized Address	USPS-formatted address with corrections
ZIP+4 Code	Full 9-digit ZIP code for faster delivery
Delivery Point	Specific delivery location code
Status	Valid, Invalid, or Corrected

Tip: Validate addresses before creating orders to reduce errors and ensure successful delivery.

Upload Driver (MUD)

The MailXstream Upload Driver (MUD) is a print driver that lets you submit documents directly from any desktop application.

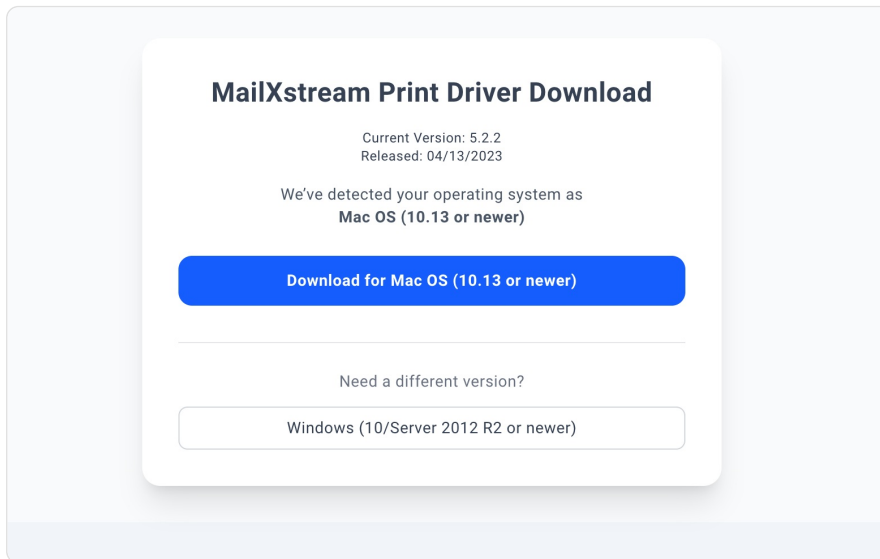


Figure 15: Upload driver download page with installation instructions

Downloading the Upload Driver

Step 1. Click your user name in the top-right corner.

Step 2. Select **MUD Download**.

Step 3. Download the installer for your operating system:

- Windows (.exe).
- macOS (.pkg).

Step 4. Run the installer and follow the on-screen prompts.

Using the Upload Driver

Once installed, the MUD appears as a printer in your applications:

Step 1. Open any application (Microsoft Word, Excel, PDF viewer, etc.).

Step 2. Open the document you want to mail.

Step 3. Select **File → Print** (or press Ctrl+P / Cmd+P).

Step 4. Choose **MailXstream** as the printer.

Step 5. Click **Print**.

Step 6. The MUD interface will open:

- Select a template.
- Enter an order name.
- Configure any options.

Step 7. Click **Submit** to send the order.

Tip: The MUD provides the same functionality as web-based order submission but integrates directly with your desktop workflow.

User Profile

Manage your personal account settings and preferences.

Updating Your Profile

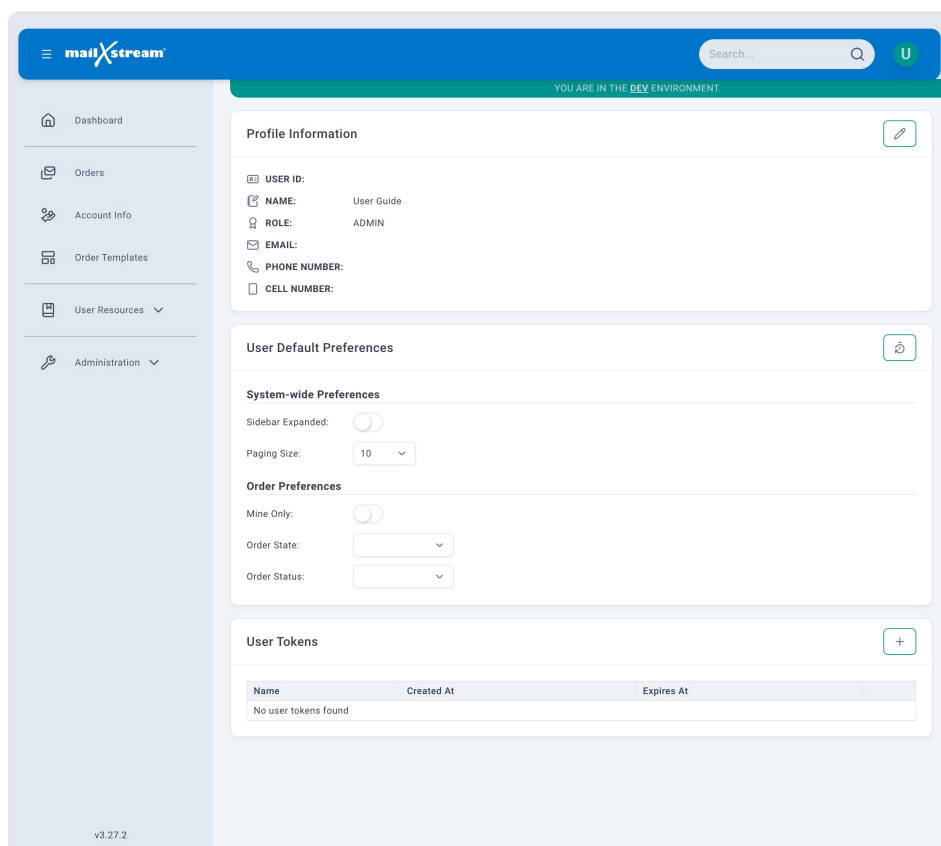


Figure 16: User profile settings page

To update your profile:

Step 1. Click your user name in the top-right corner.

Step 2. Select **Profile**.

Step 3. Update your information:

Field	Description
First Name	Your first name
Last Name	Your last name
Email Address	Your email (used for notifications and password recovery)
Phone Number	Contact phone number

Step 4. Click **Save** to apply changes.

Important: Keep your email address current. It's used for password recovery and system notifications.

Changing Your Password

Reset Password

Password

Confirm Password

Figure 17: Password change form

To change your password:

Step 1. Click your user name in the top-right corner.

Step 2. Select **Reset Password**.

Step 3. Enter your **Current Password**.

Step 4. Enter your **New Password**.

Step 5. **Confirm** your new password.

Step 6. Click **Update Password**.

Password Requirements

For security, passwords must meet these requirements:

- Minimum 8 characters.
- At least one uppercase letter (A-Z).
- At least one lowercase letter (a-z).
- At least one number (0-9).
- At least one special character (!@#\$%^&*).

Tip: Use a password manager to generate and store strong, unique passwords.

User Administration

This section covers user management features available only to users with the **Admin** role.

Note: If you don't see the **Administration** menu item in the left navigation menu, you don't have Admin privileges. Contact your organization's administrator if you need access to these features.

Accessing User Management

To access user management:

Step 1. Click **Administration** in the left navigation menu.

Step 2. The User Management page displays all users in your organization.

Viewing and Filtering Users

The User Management page displays users in a table with search and filter options.

Filter Options

Filter	Description
Name Search	Search users by name or User ID
Role Filter	Filter by user role (Admin, Manager, User, Monitor)
Enabled Only	Toggle to show only active users (enabled by default)

User List Columns

Column	Information Displayed
Enabled	Status indicator showing if the account is active
User ID	The user's login username
Name	First and last name
Contacts	Phone number and email address
Actions	Menu with available actions

Creating a New User

✕ **Create User**

First Name

Last Name

User ID

Email

Phone

Cell Phone

Role

Select a Role ▼

Allowed Templates

Memo

Figure 18: Create User form showing all available fields

To create a new user:

Step 1. Click the + **Add New User** button in the top-right corner.

Step 2. Complete the user information form:

Field	Required	Description
First Name	✓	User's first name
Last Name	✓	User's last name
User ID	✓	Login username (auto-generated from name, can be modified)
Email		Email address for notifications and password recovery
Phone		Primary phone number
Cell Phone		Mobile phone number
Role	✓	Assign a role (see User Roles)
Allowed Templates		Restrict which order templates this user can access
Memo		Internal notes about the user

Step 3. Click **Create** to add the user.

Note: The User ID must be unique. The system will verify availability as you type.

Tip: After creating a user, they will receive an email with instructions to set their password (if email is provided).

Editing a User

To edit an existing user:

Step 1. Find the user in the user list.

Step 2. Click the **Actions** menu (three dots) on the user's row.

Step 3. Select **Edit**.

Step 4. Modify the user information as needed.

Step 5. Click **Save** to apply changes.

Editable Fields

Field	Can Edit
First Name	✓
Last Name	✓
User ID	✗ (read-only)
Email	✓
Phone	✓
Cell Phone	✓
Role	✓
Allowed Templates	✓
Memo	✓

Enabling and Disabling Users

You can enable or disable user accounts without deleting them. Disabled users cannot log in but their account history is preserved.

To enable or disable a user:

- Step 1.** Find the user in the user list.
- Step 2.** Click the **Actions** menu (three dots) on the user's row.
- Step 3.** Select **Enable** or **Disable** as appropriate.
- Step 4.** Confirm the action when prompted.

Tip: Disable accounts for users who have left the organization or no longer need access, rather than deleting them. This preserves audit history and allows reactivation if needed.

Assigning User Roles

When creating or editing a user, you can assign one of four roles:

Role	Best For
Monitor	Stakeholders who need to view order status without making changes
User	Staff members who create and submit mail orders
Manager	Supervisors who need access to billing and account information
Admin	Users responsible for managing other users in the organization

Important: Be cautious when assigning the Admin role. Admins can create, modify, and disable other users, including other Admins.

Restricting Template Access

By default, users can access all order templates available to your organization. You can restrict access to specific templates when creating or editing a user.

To restrict template access:

Step 1. Create or edit a user.

Step 2. In the **Allowed Templates** field, select only the templates this user should access.

Step 3. Save the user.

Users with restricted templates will only see those templates when creating orders.

Tip: Use template restrictions to ensure users only submit orders using approved configurations for their department or role.

User Roles and Permissions

MailXstream uses role-based access control. Your assigned role determines which features you can access.

Role Comparison

Feature	Monitor	User	Manager	Admin
View Dashboard	✓	✓	✓	✓
View Orders	✓	✓	✓	✓
View Templates	✓	✓	✓	✓
Create Orders	—	✓	✓	✓
Cancel Own Orders	—	✓	✓	✓
Download Documents	—	✓	✓	✓
Use Address Validation	—	✓	✓	✓
View Account Balance	—	—	✓	✓
View Statements	—	—	✓	✓
Upload Payment Checks	—	—	✓	✓
View All Users	—	—	✓	✓
Create/Manage Users	—	—	—	✓
Modify User Roles	—	—	—	✓

Role Descriptions

Role	Description
Monitor	Read-only access to view and track order status. Ideal for stakeholders who need visibility without making changes.
User	Standard access to create and submit orders, monitor status, and download documents.
Manager	Extended access including account management, billing information, statements, and payment options.
Admin	Full access including the ability to create, modify, and manage users and their permissions within the organization.

Note: Contact your organization's administrator if you need access to features beyond your current role.

Troubleshooting

This section addresses common issues and their solutions.

Login Issues

Problem: Cannot log in to MailXstream

Possible Causes and Solutions:

Cause	Solution
Incorrect User ID	Double-check your User ID (case-sensitive)
Incorrect Password	Check Caps Lock; passwords are case-sensitive
Forgot Password	Click "Forgot password?" to reset
Forgot User ID	Click "Forgot User ID?" to receive via email
Account Disabled	Contact your administrator
Browser Issues	Clear browser cache and cookies; try a different browser

Order Errors

Problem: Order shows Error status

Steps to Resolve:

1. Click the order to view error details.
2. Download the error file for specific document issues.
3. Review the error messages.

Common Error Causes:

Error Type	Description	Resolution
Invalid Address	Recipient address cannot be validated	Correct the address and resubmit
Document Format	File format or structure not recognized	Check file format requirements
Page Count	Document exceeds template limits	Split into smaller documents
Missing Data	Required fields not populated	Ensure all required data is present

Cannot Cancel Order

Problem: Cancel button is not available

Explanation: Orders can only be cancelled during early processing states (Create, Init, Segment, Sort) when the status is Wait or Error.

If printing has begun: Call support immediately for urgent issues. Phone is fastest: 1-877-365-MAIL (6245).

Missing Menu Items

Problem: Cannot see certain menu items or features

Cause: Menu visibility is based on your user role.

Solution: Contact your administrator if you need access to additional features. See [User Roles and Permissions](#) for role capabilities.

Document Processing Issues

Problem: Documents not appearing in order or processing slowly

Troubleshooting Steps:

1. Verify the file format is supported by your template.
2. Check that the file uploaded successfully (no error messages).
3. Check file size — very large files take longer to process.
4. Verify the document isn't password-protected.
5. Ensure the document contains valid content (not blank pages).

Glossary

Term	Definition
Batch	A group of documents processed together for printing
Certificate of Mailing (COM)	Official USPS document proving mail was submitted
Duplex	Double-sided printing
First-Class Mail	USPS mail class with faster delivery (1-3 days)
Hard Insert	A physical piece included with the mailing (flyer, return envelope)
Impression	One side of a printed page
Mail Class	USPS service level (First-Class, Marketing Mail, etc.)
Marketing Mail	USPS mail class for advertising (formerly Standard Mail)
MUD	MailXstream Upload Driver — the print driver application
Piece	One complete mail item (letter in envelope)
Plex	Printing mode — simplex (1-sided) or duplex (2-sided)
Presort	Sorting mail by ZIP code to qualify for postal discounts
Simplex	Single-sided printing
Soft Insert	Digital content merged into documents (not a physical piece)
Template	Pre-configured mailing specifications
ZIP+4	9-digit ZIP code for precise mail routing

Support

For assistance with MailXstream, our support team is available to help.

Contact Methods

Method	Details	Best For
Phone	1-877-365-MAIL (6245)	Urgent issues, immediate assistance
Email	support@mailxstream.com	Non-urgent questions, documentation
Website	https://mailxstream.com	Resources, documentation, updates

Before Contacting Support

Please have the following information ready:

- Your User ID.
- Order number(s) if applicable.
- Description of the issue.
- Error messages displayed (screenshot if possible).
- Steps you've already tried.

Response Times

Priority	Description	Typical Response
Critical	System outage, cannot submit orders	Within 1 hour
High	Order errors affecting deadlines	Within 4 hours
Medium	Feature questions, non-urgent issues	Within 1 business day
Low	General inquiries, feedback	Within 2 business days

Changelog

Version 2.0 — January 2026

- Reorganized guide structure for improved usability
- Added "About This Guide" section with prerequisites and conventions
- Added Quick Start section for new users
- Enhanced step-by-step formatting throughout
- Added Glossary of terms
- Improved troubleshooting section with structured problem/solution format
- Updated all screenshots for MailXstream 3.27.x

Version 1.0 — January 2026

- Initial release of the Client User Guide
- Covers all client-facing features in MailXstream 3.27.x

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