



## Quick Start Instructions for Using Postage \$aver with Comma or Tab Separated Text Files (.csv, .tab or .txt)

[A quick demonstration using the Postage \\$aver sample file](#)

[Using Postage \\$aver with your own files](#)

### A quick demonstration using the Postage \$aver sample file

We suggest you run the sample file before using Postage \$aver for your own file. You won't have to set anything up and you can see how Postage \$aver works quickly and easily.

1.) After installing the Postage \$aver trial copy, double-click the Postage \$aver icon (the yellow postage stamp).

- For Windows, this should be on your desktop or in the Programs/Postage \$aver Software section in your start menu.
- For Mac, this should be in your Applications folder.

If you are asked for a registration code, click "Run As Pro Trial" (for a barcoded mailing) or "Run As Lite Trial" (for a nonbarcoded mailing) to continue your trial without entering a registration code.

2.) In Postage \$aver, click on the blue mailbox to start preparing your mailing. For a quick demo, just click "next" on each screen to use the sample information without making any changes, or you can fill in the actual information for your own mailings. There is a complete help page for each screen.

3.) After the information screens are complete, you will be asked to choose the mailing list file you want to use. Navigate to your "Documents" folder and choose "Postage \$aver Sample" (or "Postage \$aver Sample.xls").

4.) The next screen will verify that Postage \$aver can read the file, and will show you how many addresses the file contains. Click Finish to begin sorting the file.

5.) When the sorting is finished, you can choose the mailing reports you want to print.

6.) Next, Postage \$aver will be ready to print your addresses. You can choose any of several popular label formats, or you can choose to print addresses one-to-a-sheet, if you want to print directly on your mail piece. The addresses will be in the order that you need to assemble fill the required postal trays or sacks (and bundles, if required). Depending on the options you have selected, they can also include Intelligent Mail Barcodes (IMBs), optional endorsement lines, and "Or Current Resident" lines, as applicable.

You're finished! GREAT JOB!

## Using Postage \$aver with your own files

### Decide how you want to print your addresses:

Postage \$aver sorts your addresses in the order necessary for filling the required mail trays or sacks (and bundles, if required). You then have two options for printing your addresses:

- Postage can print your addresses, either on standard label formats or directly on your mail pieces. It's simple, and you don't need any other software.
- You may want to use a label format other than those that Postage \$aver provides, or you may want to use variable data printing to print your addresses as you are printing the mail pieces. In that case, Postage \$aver will sort your mailing list in assembly order and add barcodes and optional endorsement lines, if applicable, so you can use it for a mail merge or variable data printing.

### Setting up your file to use with Postage \$aver:

For Postage \$aver to prepare your mailing using your file, you just need to have each part of the address in a separate column. Postage \$aver needs the following columns.

- A single column containing the entire zip code, OR a column with the first five digits and a different column with the next four digits. These should be TEXT format columns, not zip code format. If you are not barcoding your mail, you only need the first five digits; and,
- A column with a city and a different column with the two-letter state abbreviation, OR a single column with both separated by a comma and space, as in "Houston, TX". This column can be in general format.
- If you are preparing a barcoded mailing, a column for the "delivery point code", explained below.

If you are using Postage \$aver to print your addresses, your file will need to separate columns for the other parts of the address for Postage \$aver to print. These include:

- Personal first and last names, which can be in separate columns or together in one column as the full name.
- A job title (optional).
- A company or organization name. Note that Postage \$aver usually needs at least a personal name or organization name, although you can do without both if you choose the option to have Postage \$aver print wording like "Current Resident" instead.
- A street address and, optionally, a second line for the street address.

### Additional requirements for barcoded mailings:

Barcoding is not required for bulk mail. However, it can provide additional benefits, such as slightly lower postage prices, faster delivery, free tracking, and a waiver of your annual bulk mailing permit fee.

But to add barcodes to your mailing, your list must first be "CASS-certified", to assure USPS that you have accurate zip+4 codes, and to provide an additional required two-digit "delivery point code". The delivery point code is never printed on your mail, but it is coded into the barcode.

Postage \$aver does not provide CASS certification for your mailing list. Software to do CASS certification is usually too expensive for small volume mailers to purchase. Instead, most small volume mailers use a list processing service that will certify your list for you for a much smaller charge (as low as under \$2 per thousand addresses). We have [more information about CASS certifying your list](#), including links to vendors.

You do not need to have CASS certification for nonbarcoded mail. For smaller mailings, it is often less expensive to send them without barcoding and not pay for CASS certification.

**To run a quick demo of barcoding, without CASS-certifying your list:** Postage \$aver can use the street address to create a delivery point code. While it will be good enough for a demo, it is not acceptable for an actual mailing. USPS requires that you CASS-certify your list for barcoded mailings, and can ask for a form that proves that you have done so, which you can only get through the CASS process.

### Adding optional columns to your file:

OK, just one more set up step...

If you will be doing a mail merge or variable data printing (and not using Postage \$aver to print your addresses), Postage \$aver may need to add data like the barcodes or optional endorsement lines (OELs) to your mailing list file, so you can print them.

And, either way, you may also want to add helpful information like the tray or sack number for each piece, or the tracking number, if you are using Informed Visibility tracking.

To have Postage \$aver add optional information, you'll need to make sure your file has the necessary columns:

Suggested Column Name	Purpose	Data Type	Minimum Size	Req. or Opt.
SEQUENCE	Sorting order	Number or Text	6	Optional
TRAY (or SACK)	Tray or sack number	Number or Text	5	Optional
BUNDLE (or group)	Bundle or group number	Number or Text	5	Optional
ENDORSEMENT	Optional Endorsement Line (OEL) for flats	Text	25	Required for flats *
BARCODE	Intelligent Mail Barcode	Text	65	Optional
SERIAL	Barcode Serial Number (if not using IV tracking)	Number or Text	6**	Optional
TRACKING	Tracking Number (if using Informed Visibility tracking)	Text	20	Optional

\* Optional Endorsement Lines (OELs) are the lines that look like \*\*\*\*\* 3D 587 that are printed above the address for mail that is prepared in bundles (flat-sized mail and nonmachinable letters). OELs indicate the sorting level and destination of the bundle. USPS strongly recommends the use of OELs, but in some circumstances allows, instead, a special colored sticker to be placed on the top piece of each bundle.

\*\* If you are a large-volume mailer that has a 6-digit mailer ID, then the minimum size of the serial number column is 9.

The column names shown are suggestions. Postage \$aver will automatically identify the correct columns to use if you use the suggested names shown, but you will always be given the opportunity to match Postage \$aver's fields to your column names even if Postage \$aver guesses incorrectly.

### Running Postage \$aver:

1. After installing the Postage \$aver trial copy, double-click the Postage \$aver icon (the yellow postage stamp).
  - For Windows, this should be on your desktop or in the Programs/Postage \$aver Software section in your start menu.
  - For Mac, this should be in your Applications folder.

If you are asked for a registration code, click "Run As Pro Trial" (for a barcoded mailing) or "Run As Lite Trial" (for a nonbarcoded mailing) to continue your trial without entering a registration code.

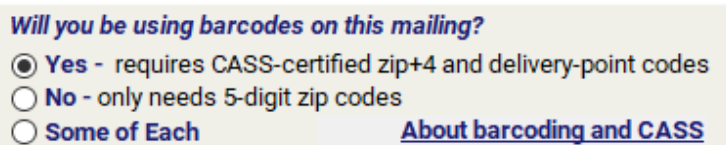
2. Start by running the Preparation Wizard, which you can do either by clicking on the blue mailbox on Postage \$aver's main screen, or by choosing Prepare Your Mailing from the menu and then choosing Preparation Wizard.
3. The Preparation Wizard will walk you through several screens so you can fill in information about your mailing. Each screen has a "GET HELP" button that explains the questions on the screen.

Postage \$aver will remember anything that you enter on these screens, so you only have to do it once for anything that does not change for each mailing.

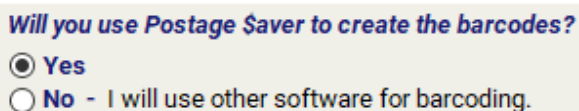
If you just want to demo the software, you can step through these screens without making any changes, except as described in the following hints.

Here are some specific hints for several of the screens:

- a. Mail Categories Screen (the first screen in the Wizard): If you are using Postage \$aver Pro (not Postage \$aver Lite), you have the option to add barcodes to your addresses.



If you choose to use barcodes, and you want Postage \$aver to print your addresses, be sure to choose YES to this question:



- b. Addressing and Mailing Screen (the second screen in the Wizard): Make sure you choose to have Postage \$aver print your addresses.

If you want to use Postage \$aver to print your addresses, choose the top option, as shown.

To print your addresses with a mail merge or variable data printing, choose the second option.

**How will you print your addresses?**

- I'll use Postage Saver to print them.**  
You'll choose your format when you start printing.
- I'll print them using a mail merge with Word or another program.**  
Postage Saver will prepare your file for the mail merge.
- I'll print them separately. I only use Postage Saver for reports.**  
For example, when using Postage Saver with utility billing software.

- c. On the Postage Saver Preferences screen (after the screen with the image of the postage statement):

If you are using Postage Saver to print your addresses, and you don't want Postage Saver to save any optional information in your mailing list file, choose "Don't save anything".

But if you are printing using a mail merge, choose the top option, "Save it in my mailing list file."

**How should Postage Saver save the information for your mailing?**

- Save it in my mailing list file.** - For saving sorting information in Excel, csv, tab-separated, Access and dBase files.
- Save it in a separate file and I'll import it into my file.** - For importing sorting information into Filemaker Pro files.
- Don't save anything.** - Simplest option. For using Postage Saver to print your addresses and reports without saving sorting information.

4. After the Postage Saver Preferences screen, you will see the standard "open file" window. Choose the mailing list file that you want to prepare. Then click Open.
5. Next up is the Column Selection screen. You use that to tell Postage Saver which columns in your file to use to find the information it needs. For example, for Postage Saver to print your addresses, it needs to know which column or columns in your mailing list file has the personal names (or the company/organization names, if you are not using personal names).

For each item that Postage Saver needs to use, there is a drop down list that will show all of the columns in your mailing list file, when you click the down arrow. You just choose the column that matches the item Postage Saver is looking for.

**Personal Names:**

*If your first and last names are in separate columns, select those columns here:*

*Or, if your first and last names are together in one column, select that column here:*

First Name:	<input type="text"/>	▼	✕
Last Name:	<input type="text"/>	▼	✕
Full Name:	<input type="text"/>	▼	✕

For example, you might have a column named "First Name" that has all the first names. You'd just select it from the list next to "First Name" on the screen.

**Personal Names:**

*If your first and last names are in separate columns, select those columns here:*

*Or, if your first and last names are together in one column, select that column here:*

First Name:

Last Name:

Full Name:

Columns that are required are shown with a red asterisk \*.

For detailed instructions for this screen, click the Get Help button at the bottom of the screen.

- Now Postage \$aver will sort your mailing list and show you its progress. When it has finished, it will give you the option of printing one or more reports. Choose the reports you want to print, or skip printing.

Select which reports to print:

<b>For the post office:</b>	<b>For assembling this mailing:</b>
<input checked="" type="checkbox"/> Postage Statement	<input checked="" type="checkbox"/> Mail Preparation Instructions
<input checked="" type="checkbox"/> Price Qualification Report	<input checked="" type="checkbox"/> Tags for Mail Trays

*You can also print these reports from the File menu any time before you run another job with Postage \$aver.*

You can print any report later by choosing that report from the File menu in Postage \$aver. The reports are saved only until you prepare another job with Postage \$aver.

If you selected the option to have Postage \$aver print your addresses, that's next.

If you would rather print them later, you can stop here. Then come back to Postage \$aver later, and go to the File menu to print. You can also print a sample address from the File menu.

To print your addresses, choose a print format.

**Choose the label format to use:**

**3 columns, 30 per page, 1 x 2 5/8 inches**  
Avery 5160/8160, etc. No barcodes.

**2 columns, 20 per page, 1 x 4 inches**  
Avery 5161/8161, etc.


**2 columns, 14 per page, 1 1/3 x 4 inches**  
Avery 5162/8162, etc.

**No label. Print directly on mail piece**  
using measurements at right

Note that the 3-column labels are too narrow to use to print postal barcodes. You must use a wider label.

Also, if you have selected too many lines of information to fit on the label you choose, you will see a warning and you will have to either choose a different label, or go back to the beginning and choose fewer columns to use (on the Column Selection screen). Postage \$aver automatically makes the printing smaller as necessary to fit as much as possible on each label format, but will not make the printing smaller than the minimum type sizes set by USPS (8-pt for nonbarcoded labels, 6-pt for barcoded labels.)

If you select "Roll labels, or print directly on the mail piece", Postage \$aver will print one address to a page. You will specify how far the address will be printed from the top edge and the left edge, and for the maximum width to allow for the address. You can also select the font size.



Font size: 9 ▾

From left edge (inches): 5

From top edge (inches): 3

Max. address width (inches): 4

These settings are only used if you are printing directly on your mail pieces or on roll labels. They are set automatically if you are printing on label sheets.

7. The addresses will be in the order you need for your trays or sacks (and bundles if applicable). That order matches the assembly instructions in the Mail Preparation Report. If you didn't already print that, you can do so by going to the File menu in Postage \$aver.

You can now follow those assembly instructions to prepare the trays or sacks that USPS requires to qualify for bulk rate postage. You can get the trays and sacks that you need from most post offices for free. If the assembly instructions tell you that you are required to bundle your mail before putting it in sacks, (mostly for flat-sized mail), size 64 rubber-bands are recommended (from most any office supply store).

You're finished! GREAT JOB!

### **Printing addresses from your file using a mail merge:**

If you selected the option to use a mail merge to print your addresses, your original file should now be in the order required for your bulk mailing. The order should match the order specified in the mail preparation instructions and the order of the listings on the price qualification report. Any information you asked Postage \$aver to add, like OELs, will be in the columns that you selected on the column identification screen when running Postage \$aver.

If Postage \$aver was unable to process some of your addresses (because of missing zip codes, for example), those addresses have been sorted to the end of the file. They have not been included in the postage calculations for the postage statement or on any of the reports. Such pieces should either be deleted from your mailing or mailed with regular stamps as first class mail. (Note that if you fix the errors and wish to include them in your mailing, you should rerun Postage \$aver so that they will be properly sorted and included in the reports.)

You can now print labels, envelopes, letters, etc. from your file using a mail merge with Microsoft Word, and the addresses will be in bulk mail order. If you're not familiar with doing a mail merge, you can watch [our quick tutorial video](#).

If you are doing a barcoded mailing, the barcodes will show up in the column you selected, but they will be in letter format, not barcode format. The barcode column will have something like this:

TADTAFTDTFDDDAATADTTDTDTFDDAFDFDTFTAFAFFDAFFDAFFFTDDTTDADTDFTTDAAT

When you set up your mail merge, choose “SmartBars12” as the font for the barcode column set at 12 point size (as explained in the [video](#)) and the font will convert the 65 letters into 65 bars according to USPS requirements. The SmartBars12 font was installed on your computer when you installed Postage \$aver.

### **Need More Help?**

All of the above information, plus a helpful tutorial on bulk mail, is contained in the Postage \$aver user guide. You can find it in the Instructions/Help menu when Postage \$aver is running.

If you cannot find what you need in the Help system, [please send us your question](#) and we will respond promptly. Thanks again for trying Postage \$aver.