

August 01, 2012

Getting Started with the Intelligent Mail® Barcode

Applies to: AddressRight® Pro

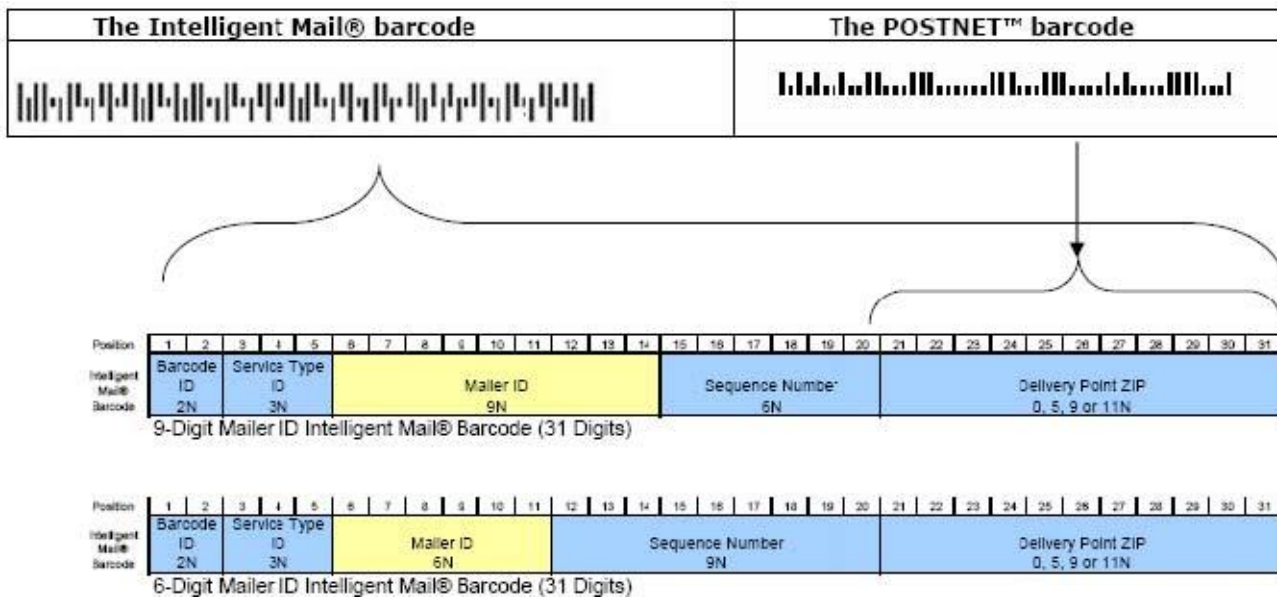
Purpose

This document provides instructions on how to start using the Intelligent Mail® barcode (IMb) in your AddressRight® Pro mailings. Using Intelligent Mail® barcodes will be required as of January 28, 2013 if you wish to obtain USPS® automation discounts.

About the Intelligent Mail® Barcode

The Intelligent Mail® barcode is a 65-bar USPS barcode that is used to sort and track letters and flats. It offers more accurate and detailed information about your mailings.

Unlike the POSTNET™ barcode, which only contains the delivery point ZIP Code, the new Intelligent Mail® barcode contains additional fields such as Service Type Indicator, Sequence Number, and Mailer ID. These fields expand your ability to number your mail so that you can uniquely identify each mail piece, track individual pieces, and provide greater visibility into the mailstream. To use the Intelligent Mail® barcode, you must populate the additional fields when setting up your mailing in AddressRight® Pro.



AddressRight® Pro • Getting Started with the Intelligent Mail® Barcode

The Intelligent Mail® barcode became available for use as an option in 2006, but will be a mandatory requirement for USPS automation discounts in January 2013. The USPS will no longer allow the POSTNET barcode to benefit from USPS automation discounts.

The Intelligent Mail® barcode replaces the functionality of several barcodes into one, including multi-service code, ACS™, POSTNET™, and PLANET®. The new requirements cover mail piece barcodes and new barcodes for tray labels, sack labels and container placards (pallets, rolling carts, etc.).

Overall, the Intelligent Mail® barcode has been designed to use USPS services, new applications, and future benefits, all inclusive in one barcode.

Procedures

Overview

Here is a brief overview of the procedures for setting up and using the Intelligent Mail® barcode in AddressRight® Pro:

1. Obtain a Mailer ID from the USPS®.
2. Enter your new Mailer ID in AddressRight® Pro.
3. Create your Intelligent Mail® barcode mailing in AddressRight® Pro.
4. Add the Intelligent Mail® barcode to your mail piece layout.
5. Print your mail list, selecting the mail piece layout you created and saved in step 4.
6. If you selected the **Full Service Intelligent Mail** box (in Procedure 3) or if your post office requires electronic documentation, you must submit via Mail.DAT® or Mail.XML®.

These steps are explained in greater detail in the remaining sections of this document.

NOTE: The information contained in **Procedure 1: Obtain a Mailer ID from the USPS®** is a reproduction of content provided in the USPS® web site (reproduced with permission).

Procedure 1: Obtain a Mailer ID from the USPS®

Steps to Obtain a Mailer ID for New Mailers

This document provides a very high level overview of how new commercial mailers can obtain a Mailer ID for automation-price mailing using the Intelligent Mail® barcode. Information includes:

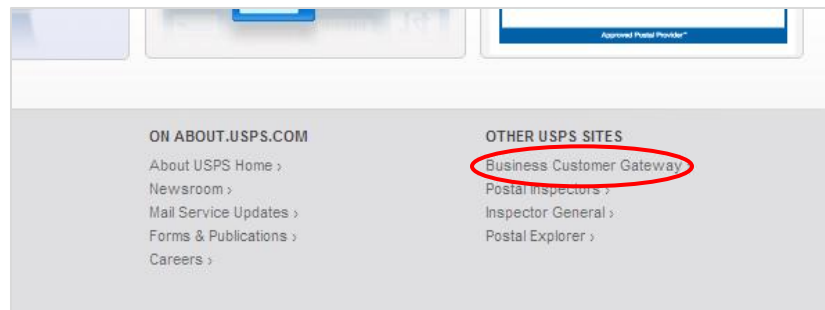
- Accessing the Business Customer Gateway
- Registering as a New User
- Noting the Customer Registration ID (CRID)
- Requesting a Business Service
- Assigning a Business Service Administrator (BSA)
- Obtaining a Mailer ID

For more detailed information, refer to the [User Access to Electronic Mailing Information and Reports Guide](#) (referred to in this document as the “Guide”) available on RIBBS® at <http://ribbs.usps.gov/index.cfm?page=intellmailguides>

NOTE: The screen shots may vary from the actual web site due to ongoing enhancements to the portal!

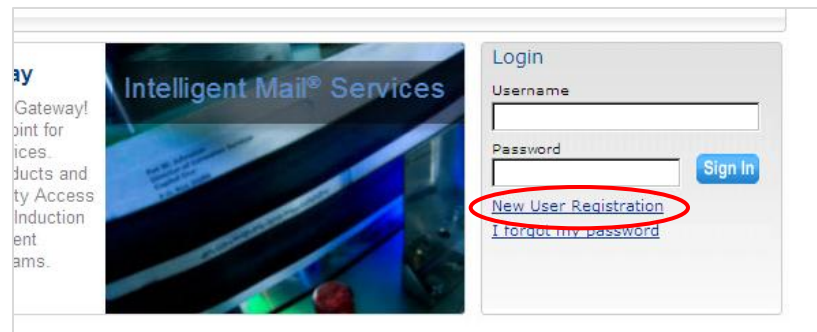
Accessing the Business Customer Gateway

On the USPS web site, click on the **Business Customer Gateway** link, located under the **OTHER USPS SITES** column in the bottom right hand corner of the web page.



Registering as a New User

1. On the Business Customer Gateway login page, click **New User Registration** located in the Login section.



AddressRight® Pro • Getting Started with the Intelligent Mail® Barcode

2. Pick a username, password and two security questions.

Create a username & password
* Indicates a required field

***Pick a Username**
Usernames need 6 characters. You can use your email address. ?
[Text Input]
[CHECK THIS NAME]

***Pick a Password**
Passwords need 7 characters, including a letter and number. They are case-sensitive. They can include special characters, but not your username or more than two repeat characters in a row. ?
[Text Input]
Password Strength: [Progress Bar] 0% Too Short
[Text Input]
Re-Type Password: [Text Input]

***Pick Two Security Questions**
Please answer two secret questions. If you forget your password, you will be asked for this information to re-gain access to our site.

***Pick Your First Security Question**
[Select]
Your Answer: [Text Input]
Answers are not case-sensitive. ?
Re-Type Your Answer: [Text Input]
[CONFIRM FIRST SECURITY ANSWER]

3. Enter contact and company information.

Next, we need your name and contact info
* indicates a required field

Enter Your Name
Title: [Select]
*First Name: [Text Input] M.I.: [Text Input] *Last Name: [Text Input]
Suffix: [Select]

Enter Your Address ?
*Country: [UNITED STATES]
*Company Name: [Text Input]
*Street Address: [Text Input]
Apt/Suite/Other: [Text Input]
*City: [Text Input]
*State: [Select] *ZIP Code™: [Text Input]

Enter Your Phone Number
*Type: [US] *Phone: [Text Input] Ext.: [Text Input]
Type: [US] Fax: [Text Input]

Enter Your Email Address
[Text Input]
*Re-Type Your Email Address: [Text Input]

Can we contact you?
Get communications from USPS and our partners.
 From USPS
 From USPS Partners

4. Read the Privacy Policy and click **Create Account**.

Please read our privacy policy.

Privacy Act notice: The information you supply will be used to provide you online registration capability for Internet-based services, and to provide those services. Please be aware that this service is voluntary, but that requested information is required to provide the service. Collection of information for this service is authorized by 39 U.S.C. 401, 403, & 404. We do not disclose your information without your consent to third parties, except to facilitate the

[Create Account]

Noting the Customer Reference ID (CRID)

Customer Reference IDs (CRIDs) are automatically assigned A) when you are awarded a bulk mailing permit, or B) during the initial login at the Business Customer Gateway. For each unique combination of company name and physical address, the USPS® will create a new CRID that connects a company's information at a specific geographic location across all USPS® applications. The CRID is required in order to sort using one of the Intelligent Mail® barcode options. To locate the CRID:

- 1) Click the **GATEWAY** link located at the top of most Business Customer Gateway web pages.

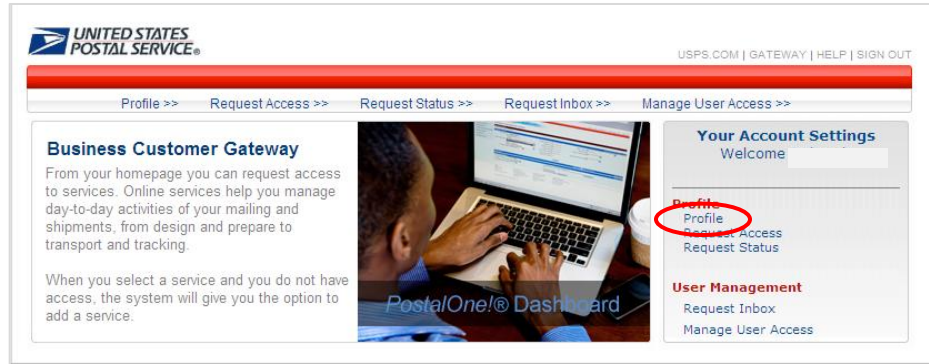
UNITED STATES POSTAL SERVICE®

USPS.CRM | **GATEWAY** | HELP | SIGN OUT

Profile >> Request Access >> Request Status >> Request Inbox >> Manage User Access >>

AddressRight® Pro • Getting Started with the Intelligent Mail® Barcode

- 2) Click the **Profile** link found under Your Account Settings.



- 3) The CRID is located in the Business Locations table.



For more information on **CRIDs**, see section 2 "Navigating the Business Customer Gateway" in the Guide.

Requesting a Business Service

A “business service” is functionality that mailers can request access for through the Gateway. A Service must be authorized before access is granted.

For more information on **requesting a service**, see section 2 “Navigating the Business Customer Gateway” in the Guide.

Obtaining a Mailer ID

1. If you are not on the *Select a Business Service* page, click the **GATEWAY** link found at the top of a Business Customer Gateway web page.
2. Under the Design & Prepare category, click the **Mailer ID** link.

Locate service where Service Name contains:

- Small Business Services**
 - Select Multiple Services (details)
- Account Services**
 - Incentive Programs (details)
 - Verification Assessment Evaluator (PostalOne!) (details)
- Design & Prepare**
 - Intelligent Mail Small Business (IMsb) Tool (details)
 - Mailer ID (details)**
- Mail & Transport**
 - Customer Label Distribution System (CLDS) (details)
 - Customer/Supplier Agreements (CSAs) (details)
 - Schedule a Mailing Appointment (FAST) (details)
 - Transportation Location Service (TLS) (details)
- Mailing Services**
 - Audit Mailing Activity (PostalOne!) (details)
 - Every Door Direct Mail (details)
- Shipping Services**
 - Manage Electronic Return Activity (PRS) (details)
 - Manage Electronic Verification Activity (eVS) (details)
 - Manage Scan Based Payment Activity (SBP) (details)
 - Online Enrollment (details)
- Track & Report**
 - Manage Mailing Activity (details)

Account Services

- Balance & Fees (PostalOne!)
- Manage Permits (PostalOne!)

Design & Prepare

- Automated Business Reply Mail
- Intelligent Mail Services
- Mailer ID**

Mail & Transport

- Centralized Account Processing System (CAPS)
- Customer/Supplier Agreements (CSAs)

Mailing Services

- Audit Mailing Activity (PostalOne!)

Shipping Services

- Manage Electronic Return Activity (PRS)
- Manage Scan Based Payment Activity (SBP)

Track & Report

- ADVANCE
- Product Performance Reports

Tools & Wizard

- Dashboard (PostalOne!)
- Postal Wizard (PostalOne!)

Customer Support

3. Select checkbox next to desired location(s), click **Next**.

Select Business Locations

Select at least one business location to associate to a service. This enables you to access the data for that business location.

You have selected the following online service:

Service

Mailer ID (details)

When using this service, you will be linked with the business locations you add to your user profile. If you would like to be linked with a business location that is not shown in the table below, click the **Add Location** button to add a new location to your profile.

After you have entered all of the desired business locations, attach them to the business service by selecting the check box next to each business name, and then click the **Next** button.

Click the **Cancel** button to return to the previous screen.

Existing Business Locations **Add Location**

	Business Name	CRID	Address	City	State/Province	ZIP/Postal Code
<input type="checkbox"/>	Pitney Bowes			Danbury	CT	

Cancel **Next >**

4. Review the information, click **Confirm**.

Assigning a Business Service Administrator (BSA)

Before selecting a service, the BSA must be identified.

Unless a different person is going to be the primary BSA, simply:

- Review the Terms and Conditions.
- Acknowledge that you've read and understand the agreement.
- Select the desired Business Name.
- Click **Yes**.

Business Service Administrator Approval

The Business Service Administrator (BSA) role must be in place to manage requests for access to a business location(s).

Click the **No Thanks** button if you do not want to assume the BSA role. Your request for access will be placed in a queue until the BSA role is filled. The BSA for this location will act on all requests for access to this Business Service.

Please review the following Terms and Conditions:

CONTENTS

- Section 1 GENERAL
- Section 2 TRANSACTION TERMS
- Section 3 USPS OBLIGATIONS
- Section 4 PARTICIPANT OBLIGATIONS
- Section 5 PARTICIPANT LIABILITY
- Section 6 GENERAL TERMS AND CONDITIONS
- Section 7 PRIVACY ACT
- Section 8 USER RESPONSIBILITY STATEMENT
- Section 9 EXECUTION

This Agreement entered into between the United States Postal Service® ("Postal Service" or "USPS") and Participant describes the terms and conditions pertaining to the Participant's participation in and use of Postal Service computer systems as described and authorized by the USPS. These terms and conditions are subordinate to, and do not supersede, any provisions of the Domestic Mail Manual (DMM®) or any other regulations or rulings of the USPS applicable to

By selecting this box, I agree to the USPS Online Agreement.

Please select which of the following companies for which you wish to become the BSA:

	Business Name	CRID	Address	City	State/Province	ZIP/Postal Code
<input type="checkbox"/>	Pitney Bowes			Danbury	CT	

No Thanks **Print** **Yes**

Access should be granted.

- Click **Continue**.

Business Service Administrator (BSA) Access Granted

You have been granted BSA privileges for the following business location(s):

Business Name	CRID	Address	City	State/Province	ZIP/Postal Code
Pitney Bowes			Danbury	CT	

Continue

For more information on **BSAs**, see section 2 "Navigating the Business Customer Gateway" in the Guide.

Obtaining a Mailer ID ... continued

You may need to go back to the Services page and click the **Mailer ID** link again.

1. Select the desired location from the Business Location drop-down.
2. Click **Request a MID**.

Welcome to the Mailer ID System

- [Export MID Data](#)
- [Address Book: Add Data Recipients](#)

Mailer ID Search

Mailer ID:

Business Location: **Pitney Bowes 06810-4148**

Customer Reference:

Selected CRID
 All CRIDs

Search **Request a MID**

Mailer ID Summary

Mailer ID	Business Location	Profile
	No company data was found.	

< Back **Page 0 Of 0** **Next >**

AddressRight® Pro • Getting Started with the Intelligent Mail® Barcode

- Use the MID Type drop-down to select a 6-digit or 9-digit Mailer ID. 6-digit MIDs are reserved for large volume (10,000,000 pieces+) mailers.
- Enter a number into the Number of MIDs Requested.
- Click **Request Mid**.

Insufficient Volume for 6 digit MID.

Apply For a Mailer ID

Select the type of MID you would like to request: 6 digit or 9 digit. You may apply for a maximum of 10 MIDs per site in one request. Please revisit this page if you would like to apply for more than 10 MIDs. Use the drop down menu to select either a 6 digit MID or a 9 digit MID.

Please fill in the following information

MID Type / Company Name / Quantity	6 Digit - Pitney Bowes - 0 Available
Number of MIDs Requested	<input type="text"/>

- For a mailer using FULL or BASIC and no other services, check option Full / Basic Service.
- Click **Request Mid**.

Mailer ID Program Option Details

Apply For a Mailer ID

Select whether you wish to assign a specific Mailer ID number or have the system assign it, and indicate which programs will be used with this Mailer ID (at least one must be selected).

Mailer ID Request # 1

<input checked="" type="radio"/> Automatically generate this Mailer ID.	Check the boxes for the program options you are selecting. Note: If you select one of these options you can not select a Package Product program option for this Mailer ID.
<input type="radio"/> Please try to assign the Mailer ID I have requested below. <input type="text"/>	
<input type="checkbox"/> Add a Customer Reference <input type="text"/>	<input type="checkbox"/> CONFIRM
	<input type="checkbox"/> Full / Basic Service
	<input checked="" type="checkbox"/> Full Service ACS (Must select Full / Basic Service to receive Full Service ACS)
	<input type="checkbox"/> One Code ACS (Submit Form 3573 to acs@usps.gov)
	<input type="checkbox"/> One Code ACS with CONFIRM (Submit Form 3573 to acs@usps.gov)
	<input type="checkbox"/> Traditional ACS Submit Form 3572 to acs@usps.gov. Traditional ACS is not available in conjunction with OneCode or Full Service ACS.
	Check the box for the Package Product Program option you are selecting. Only one program option can be selected. Note: If you select one of these options you can not select a program option from above for this Mailer ID. For either Package Products option, submit the PS Form 5051 to dconfirm@usps.gov or fax to 901-821-6244.
	<input type="checkbox"/> Confirmation Services for Package Service Products and Extra Services (i.e. Delivery Confirmation, Signature Confirmation, Certified Mail, Express Mail, Priority Mail Open and Distribute)
	<input type="checkbox"/> Electronic Verification System (eVS) for Package Products

- The new Mailer ID is displayed.
- Click **Return to Summary**.

Program Options

The following Mailer IDs have been issued in response to your request. Click on selected Mailer ID to change options.

New Mailer ID	
Mailer ID:	
Program(s) selected:	Full / Basic Service
Customer Reference (alias):	

For more information on **Mailer IDs**, see section 8 "Mailer ID System" in the Guide.

Procedure 2: Enter Your New Mailer ID in AddressRight® Pro

To enter your new Mailer ID in AddressRight® Pro:

- 1) Launch AddressRight® Pro.
- 2) Select menu item **Wizards > Mailing Permit Wizard**.
- 3) Click **Next** on the **Welcome** screen.
- 4) Enter the required fields on the **Mailing Role and Permit Information** screen:

- a. Enter the permit number in the Permit Number field.
- b. Select the appropriate permit type from the Permit Type drop-down.
- c. Enter the issuing post office city, state and ZIP in the Issuing Post Office fields. A nine-digit ZIP is required; use "0000" if you do not know the ZIP+4.
- d. Click **Next**.

The screenshot shows the 'Mailing Permit Wizard' window with the 'Mailing Role and Permit Information' tab selected. The window title is 'Mailing Permit Wizard' and it has a close button (X) in the top right corner. The main heading is 'Mailing Role and Permit Information' with a sub-heading 'Specify your role in this mailing and the permit information.' and an icon of a stack of papers. The form is divided into three sections: 'Role in Mailing' with radio buttons for 'Mail Owner' (selected) and 'Mailing Agent'; 'Permit Holder' with radio buttons for 'My Company (Agent)', 'Mail Owner', and 'Third Party'; and 'Permit Information' with fields for 'Permit Number', 'Permit Type' (dropdown menu showing 'Permit Imprint'), 'Date Issued' (dropdown menu showing '5/31/12'), 'Issuing Post Office' (text field with a small box for state), 'CAPS Customer ID', and 'Federal Agency Code'. At the bottom, there are buttons for 'Help', 'Cancel', 'Previous', 'Next', and 'Finish'.

- 5) Enter the required fields on the **Mailing Permit Information** screen:

- a. Enter the contact information in the Contact Name, Company Name and Telephone Number fields.
- b. Enter your address in the Address, City, ST and ZIP Code fields. A nine-digit ZIP is required for electronic documentation and full service.
- c. (optional) Enter your customer registration ID (CRID) in the Customer Reg ID field.
- d. Enter your mailer ID (MID) in the Mailer ID field.
- e. Click **Next**.

The screenshot shows the 'Mailing Permit Wizard' window with the 'Mailing Permit Information' tab selected. The window title is 'Mailing Permit Wizard' and it has a close button (X) in the top right corner. The main heading is 'Mailing Permit Information' with a sub-heading 'Enter your mailing permit information.' and an icon of a stack of papers. The form is divided into two sections: 'Permit Information' with fields for 'Contact Name', 'Company Name', 'Address', 'City, ST, ZIP Code', 'Telephone Number', 'Email', 'Customer Reg. ID', and 'Nonprofit Auth No.'; and 'Mailer ID' with a field for 'Mailer ID' and a 'Settings...' button. At the bottom, there are buttons for 'Help', 'Cancel', 'Previous', 'Next', and 'Finish'.

- 6) Update the name and description on the **Mailer Permit Wizard Summary** screen, then click **Next**.

Procedure 3: Create Your Intelligent Mail® barcode Mailing

To create an Intelligent Mail® Barcode mailing using the Presort Wizard:

- 1) Launch AddressRight® Pro.
- 2) Open target list (click **Mailing Lists** from the left menu then double-click the target list)
- 3) Select menu item **Wizards > Presort Wizard**.
- 4) Click **Next** on the **Welcome** screen.
- 5) Select option **Intelligent Mail** in the **Mailing Type** screen, then click **Next**.

Presort Wizard

Mailing Type Specify the type of mailing to perform.

Mailing Type

Intelligent Mail
This option requires Intelligent Mail barcodes on mail pieces.

POSTNET
Note: USPS plans to eliminate Automation discounts for POSTNET barcodes. For more information, please see 'Getting Started With the Intelligent Mail® Barcode' in the Documents folder on the AddressRight Pro DVD.

Always use Intelligent Mail (this page will no longer be shown)

Help Cancel Previous Next Finish

- 6) Update the **Sort Class and Piece Type** screen in accordance with your mailing, then click **Next**.
- 7) Update the **Mail Piece Information** screen in accordance with your mailing, then click **Next**.

8) In the **Mailing and Permit Information** screen:

- a. Enter the ZIP of your entry post office in the **Mail Drop ZIP Code** field.
- b. Select the permit holder you created in Procedure 2 of this document, then click **Next**.

Presort Wizard

Mailing and Permit Information Enter mailing information and select or create a permit.

This Mailing

Mail Drop ZIP Code: 06810 Job ID:

Mailing Date: 5/31/12 Statement Number:

Mailing Permit

Name	Permit #
Mailing Permit Wizard...	00
Pitney Bowes - Permit Imprint - 00	Permit Imprint
Sample Permit Imprint (DEMO)	

Contact: John Doe
Pitney Bowes
Mailer ID: 900000000

Help Cancel Previous Next Finish

AddressRight® Pro • Getting Started with the Intelligent Mail® Barcode

- 9) If you have entered a key for the Electronic Documentation option, the Mail.dat Information screen is displayed. If you do not plan to use Mail.DAT, leave this screen blank, otherwise enter the required fields:

NOTE: If this screen is not filled out, the Mail.DAT option will be disabled in both the Report section of the **Presort Progress** screen and the Electronic Documentation Wizard. If this screen is filled out, some of the fields will also be used as default settings in Mail.XML submissions.

- Enter your Mail.DAT license code in the License Code field.
- Enter your contact information in the Contact Name, Phone and Contact Email fields.
- Enter your verification facility information in the Verification Facility section.
- Click **Next**.

Presort Wizard
Mail.dat Information | Enter the information needed to create the Mail.dat files.

License Holder
License Code:
Contact Name: Phone:
Contact Email:

Verification Facility
Identifier: Name:
ZIP+4 Code:

This Mailing
Version: 11-2 12-1
 Generate Piece Detail Records

Buttons: Help, Cancel, Previous, Next, Finish

- 10) Update the Sorting Preparation screen in accordance with your mailing, then click **Next**.

- 11) In the **Intelligent Mail Settings** screen:

- Select option **Full Service Intelligent Mail**, if you wish to get Full Service discounts.
- If you do not select the Full Service option, select option **Sequence mail pieces** to generate sequence numbers. If you do not select either option, the sequence number applied to each mail piece will have the same value (000000 or 000000000).
- (optional) Select option **Address Change Service**, if you wish to include an ACS in your barcode.
- Click **Next**.

Presort Wizard
Intelligent Mail Settings | Specify your Intelligent Mail settings.

Services
 Address Change Service Full Service Intelligent Mail
 Forward Mail Piece (CSR)
 Return Mail Piece (ASR)
 Manual Corrections

Barcode Mailer ID
 Mail Owner Mailing Agent

Sequencing
 Sequence mail pieces
Method: Automatic Manual User Field
Starting Piece #: Tray: Pallet:

Buttons: Help, Cancel, Previous, Next, Finish

NOTE: A Full Service Intelligent Mail sort gives an additional \$0.001 or \$0.003 discount per piece if you submit your documentation electronically. The Full Service methods that are supported include Mail.DAT and Mail.XML.

AddressRight® Pro • Getting Started with the Intelligent Mail® Barcode

12) In the **Tray Label Layout** screen:

- a. If you did not select option **Full Service Intelligent Mail** on the previous screen and you do not wish to generate Intelligent Mail® container labels, select option **Intelligent Mail Container** in the Label Type section.
- b. Click **Next**.

The screenshot shows the 'Presort Wizard' window with the 'Tray Label Layout' tab selected. The window title is 'Presort Wizard' and it has a close button in the top right corner. The main heading is 'Tray Label Layout' with a sub-heading 'Describe your label stock.' and a folder icon. Below this, there are two sections: 'Printer Type' and 'Label Type'. Under 'Printer Type', there are three radio buttons: 'Dot Matrix', 'Laser or Inkjet' (which is selected), and 'Intelligent Mail Container'. Under 'Label Type', there are two radio buttons: 'Legacy Container' (which is selected and circled in red) and 'Intelligent Mail Container'. Below these is the 'Label Layout' section, which contains a table with columns 'Name' and 'Details...'. The table has three rows: 'Custom...', '2 x 5 sheet (3-1/4" by 2")', and '2 x 5 sheet (3-1/4" by 1-7/8")'. To the right of the table, there are labels for 'Paper: 2 x 5 sheet (3-1/4" by 2")', 'Label Size: 2" x 3.25"', and 'Layout: 2 x 5'. Below the table is a 'Details...' button and a 'Type: Tray Label' label. At the bottom, there is a 'Mailer Information' section with fields for 'Company Name: Pitney Bowes Inc.', 'City, ST, ZIP Code: Danbury CT 06810'. At the very bottom, there are five buttons: 'Help', 'Cancel', 'Previous', 'Next', and 'Finish'.

13) Update the name and description on the **Presort Wizard Summary** screen, then click **Finish**.

AddressRight® Pro • Getting Started with the Intelligent Mail® Barcode

To create an Intelligent Mail® Barcode mailing using the One Step Presort Wizard:

- 1) Launch AddressRight® Pro.
- 2) Open target list (click **Mailing Lists** from the left menu then double-click the target list)
- 3) Switch to the One Step Presort Wizard mode:
 - a. Select menu item **Tools > Settings**.
 - b. Click the **Preferences** tab.
 - c. Select option **Presort** in the One Step section.
 - d. Click **OK** to save settings.
- 4) Select menu item **Wizards > Presort Wizard**.

Presort Wizard
Use this wizard to describe and run your mailing.

1) Mailing Type
 Intelligent Mail POSTNET

2) Sort Class/Piece Type

Sort Class	Piece Type	Machinability
<input checked="" type="radio"/> First-Class Mail	<input checked="" type="radio"/> Letters	<input checked="" type="radio"/> Machinable
<input type="radio"/> Periodicals	<input type="radio"/> Flats	<input type="radio"/> Nonmachinable
<input type="radio"/> Standard Mail	<input type="radio"/> Postcards <input type="checkbox"/> Double	
<input type="radio"/> Package Services	<input type="radio"/> Parcels	
	<input type="radio"/> Irregular Parcels	

3) Piece Dimensions
Thickness: 0.1 in based on 1 piece(s)
Height: 4.125 in Width: 9.5

4) Piece Weight
 Fixed: 1 oz(s) based on 1 piece(s)
 Mixed - Use piece Weight and Thickness from address record

5) This Mailing
Drop ZIP Code: 06810 Date: 5/31/12
Job ID: Statement #:

6) Mailing Permit
Permit: Pitney Bowes - Permit Imprint - 00

7) Periodicals
Publication:

8) Mail.dat
Not specified

9) Sort Levels
First sort level: Automation
Second sort level: Nonautomation
Third sort level: Single Piece
Fourth sort level:

10) Advanced Options

 Pieces are barcoded
1 & 2-foot trays; 6" max. bundles; Not using pallets

11) Intelligent Mail
Mailer ID: Mail Owner (900000000)
Settings: Basic; Sequenced (Auto)

12) Discounts
Mail Drop Post Office
 SCF NDC ADC DDU
 Nonprofit Limited Circulation PVDS
 Mobile Barcode Promotion

13) Tray Labels
Layout: Laser/Inkjet; 2 x 5 sheet (3-1/4" by 2"); 2" x

14) Template Options
 Save template Run presort
Name:

- 5) In the **Mailing Type** section (1), select option **Intelligent Mail**.
- 6) Update the **Sort Class/Piece Type**, **Piece Dimensions** and **Piece Weight** sections (2, 3 and 4) in accordance with your mailing.
- 7) In the **This Mailing** section (5), input your entry post office ZIP in the **Drop ZIP Code** field.
- 8) In the **Mailing Permit** section (6), click **Select**, highlight the permit holder you created in Procedure 2, then click **OK** to return to the Wizard.

AddressRight® Pro • Getting Started with the Intelligent Mail® Barcode

- 9) If you plan to submit Mail.DAT, in the **Mail.dat** section (8), click Settings, fill in the required fields, then click **OK** to return to the Wizard.
- 10) Update the **Sort Levels** and **Advanced Options** sections (9 and 10) in accordance with your mailing.
- 11) In the Intelligent Mail section (11), click Settings.
 - a. Select option **Full Service Intelligent Mail**, if you wish to get Full Service discounts.
 - b. If you do not select the Full Service option, select option Sequence mail pieces to generate sequence numbers. If you do not select either option, the sequence numbers applied to each mail piece will have the same value (000000 or 000000000).
 - c. (optional) Select option **Address Change Service** if you wish to include ACS in your barcode.
 - d. Click **OK** to return to the Wizard.
- 12) Update the **Discounts** section (12) in accordance with your mailing.
- 13) In the **Tray Labels** section (13), click **Settings**.
 - a. If you did not select option **Full Service Intelligent Mail** in the Intelligent Mail section and if you wish to generate Intelligent Mail® container labels, select option **Intelligent Mail Container** in the Label Type section.
 - b. Click **OK** to return to the Wizard.
- 14) In the **Template Options** section (14), update the name, check **Save template**, then click **OK**.

AddressRight® Pro • Getting Started with the Intelligent Mail® Barcode

To setup Presort for submission via PostalOne! Using Mail.XML:

No additional steps are required in the Presort Wizards as you will be prompted for the missing information in the Electronic Documentation Wizard. However, the information required to submit can be entered (and saved) into the Presort Wizards as follows:

- 1) In the **Mailing and Permit Information** screen:
 - a. Double-click the permit holder you created in Procedure 2 to launch the Mailing Permit Wizard.
 - b. Click **Next** twice to display the **Mailing Permit Information** screen.
 - c. Enter your customer registration ID (CRID) in the Customer Reg ID field.
 - d. Click **Next**, then **Finish** to save your changes.

Mailing Permit Wizard

Enter your mailing permit information.

Permit Information

Contact Name:

Company Name:

Address:

City, ST, ZIP Code:

Telephone Number: Email:

Customer Reg. ID: Nonprofit Auth No.:

Mailer ID

Mailer ID: -

- 2) In the **Mail.dat Information** screen:
 - a. Enter your Mail.DAT license code in the License Code field.
 - b. Enter your contact information in the Contact Name, Phone and Contact Email fields.
 - c. Enter your customer registration ID (CRID) in the Identifier field.
 - d. Enter a value in the Name field.
 - e. Enter the permit holder's nine-digit ZIP in the ZIP+4 Code field.

Presort Wizard

Enter the information needed to create the Mail.dat files.

License Holder

License Code:

Contact Name: Phone:

Contact Email:

Verification Facility

Identifier: Name:

ZIP+4 Code:

This Mailing

Version: 11-2 12-1

Generate Piece Detail Records

- 3) The **PostalOne! Information** screen on the Electronic Documentation Wizard obtains its default values from the sources listed below. These values can be overridden.

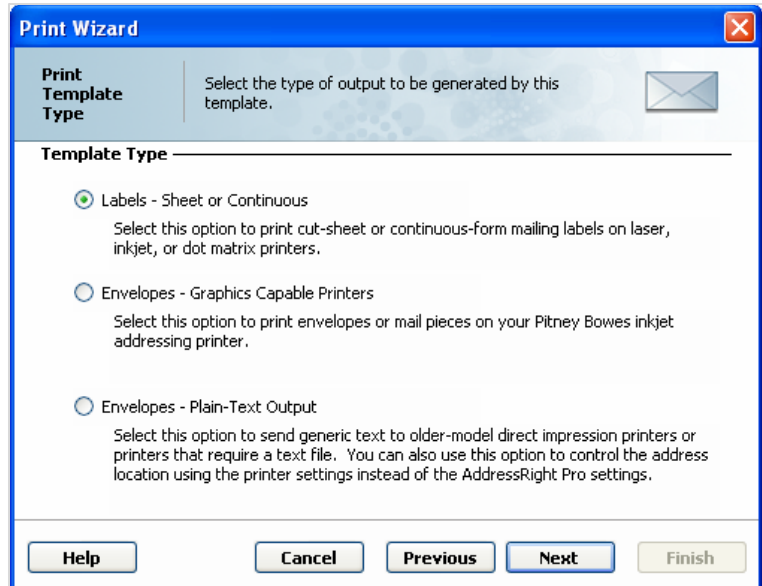
Submit Wizard Field	Presort Wizard (Screen > Field)	Submit Wizard Field	Presort Wizard (Screen > Field)
Customer Reg ID	Mailing Permit Information > Customer Reg ID	Identifier (2)	Mail.dat Information > Identifier
Mailing Title	Sorting Preparations > Documents > Title	Phone	Mail.dat Information > Phone
Name	Mail.dat Information > Contact Name	ZIP+4 Code	Mail.dat Information > ZIP+4 Code

Procedure 4: Add an Intelligent Mail® Barcode to the Piece Layout

To add an Intelligent Mail® barcode to your mail piece layout:

- 1) Run the Presort Wizard using the Mail Type option **Intelligent Mail**.
- 2) Select menu item **Wizards > Print Wizard**.

- 3) Click **Next** on the **Welcome** screen.
- 4) Select a Template Type option in the **Print Template Type** screen, then click **Next**.
- 5) Perform one of the following, then click **Next**.



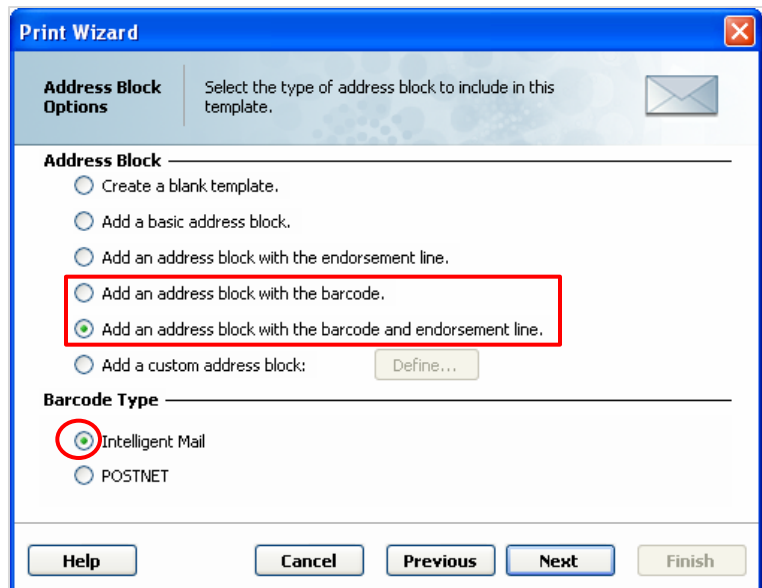
- a. Select the target printer from the Printer drop-down in the **Label Options** screen.
- b. Select the target printer from the Printer drop-down in the **Graphical Envelope Options** screen. Select option **Pitney Bowes Inkjet Addressing Printer**. Highlight the target Pitney Bowes printer in the list.

- c. Select the target driver from the Driver drop-down in the **Plain-Text Envelope Options** screen. Select the target printer from the Printer Model list.

- 6) Select a layout from the **Envelope Options** (or **Layout Options**) screen or double-click **New Envelope/Letter Layout** (or **New Label Layout**) to create a new template, then click **Next**.

- 7) In the **Address Block Options** screen:

- a. Select one of the Address Block options (#4, #5) that include 'barcode' in the text.
- b. Select the Barcode Type option **Intelligent Mail**.
- c. Click **Next**.



- 8) Update the name and description in the **Print Summary Wizard** screen, then click **Finish**.

- 9) Drag the address block to the desired location in the layout. Feel free to change the Font Color, Font Type, Font Size, etc.

- 10) Click the **X** in the upper right corner to save and close the template.

Procedure 5: Print Mail Pieces

To print a mail piece layout that includes an Intelligent Mail® barcode:

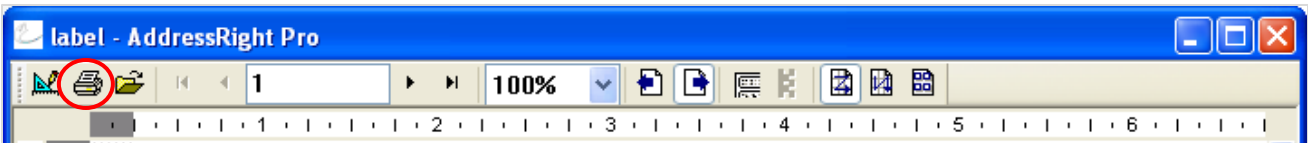
Option A: Print from the Print Template (mail piece layout)

This method requires that the target mail list has, at some point, been run through the Presort Wizard using the Mail Type option **Intelligent Mail**.

- 1) Click **Print** from the left pane menu.
- 2) Double-click the target mail piece layout from the Print Templates list.
- 3) Click the **Go To Preview Mode** toolbar icon (paper with magnifier – first from left).



- 4) Click the **Print Records** toolbar icon (printer – second from left).



- 5) Update the Print Range section in the Mail Print Setup dialog, then click **Print**.

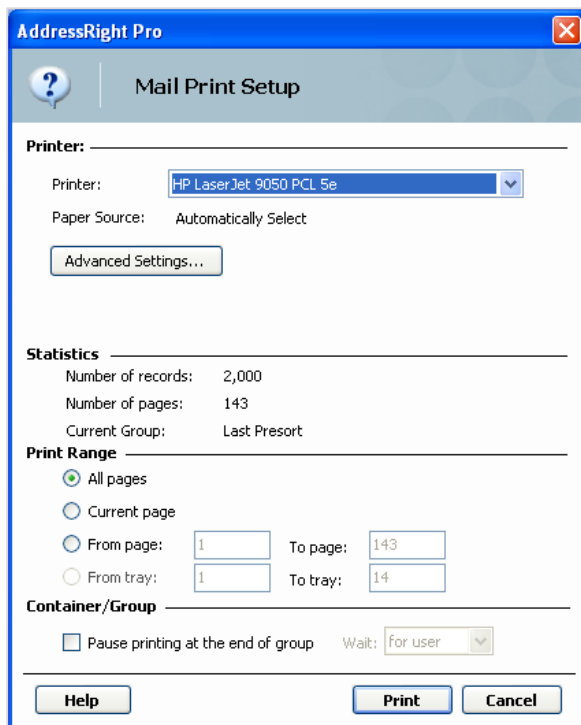


Figure A - Mail Print Setup for labels

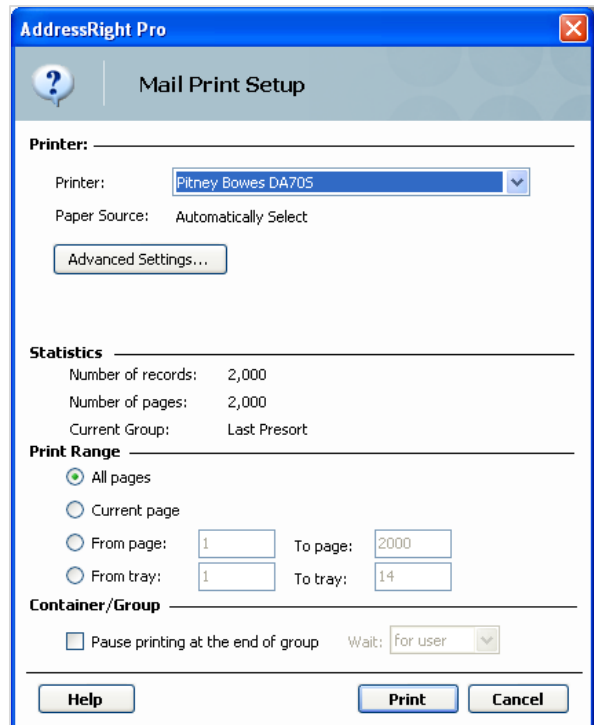


Figure B - Mail Print Setup for envelopes

Option B: Print from the presort Progress screen in the Presort Wizard

This method requires that the target mail list has just completed a presort and you have not closed the **Presort Progress** screen in the Presort Wizard.

- 1) Select the target layout from the Template drop-down in the Labels and Envelopes section of the Presort Progress dialog.
- 2) Click **Print**.
- 3) Update the Print Range section in the Mail Print Setup (Figures A and B) dialog, then click **Print**.

Procedure 6: Submitting Postal Documentation Electronically

You will need to submit postal documentation electronically if you any of your sort levels included Automation and your **Intelligent Mail Settings** screen has option **Full Service Intelligent Mail** checked, or if your local post office requires it.

NOTE: Electronic submission of postal documentation for automation discounts is **not** required until January 2014.

AddressRight® Pro supports two methods for submitting postal documentation electronically; Mail.DAT® and Mail.XML®; both require the purchase of the Electronic Documentation add-on.

The Electronic Documentation add-on lets you upload electronic postal forms to the PostalOne! system. You must establish an IDEAlliance account with the USPS®. Once granted, you will receive your User License Code and Verification Facility information required to create Mail.DAT® or Mail.XML® files.

You will also be required to open an account at the USPS® Business Customer Gateway and take a series of simple tests to ensure you are ready to submit a live mailing. See document *Getting Started with Mail.XML® in AddressRight® Pro* located on the AddressRight® Pro DVD for more details.

AddressRight® Pro • Getting Started with the Intelligent Mail® Barcode

Mail.DAT®:

Mail.DAT® is the mailing industry standard specification for a set of relational database files describing all the characteristics of a mailing. The USPS® accepts this electronic representation of the mailing as a replacement for the traditional hardcopy documentation.

- 1) Launch the Presort Wizard.
- 2) Advance to the **Mail.dat Information** screen:
 - a. Fill-in your license and verification facility information.
 - b. Select a Mail.DAT Version; as standards are frequently updated and old ones are retired, the number of versions available will vary based on the mailing date.
 - c. Click **Next**.
- 3) Navigate through the remaining setup screens; click **Finish** on the **Presort Wizard Summary** screen.

Presort Wizard

Mail.dat Information Enter the information needed to create the Mail.dat files.

License Holder

License Code:

Contact Name: Phone:

Contact Email:

Verification Facility

Identifier: Name:

ZIP+4 Code:

This Mailing

Version: 11-2 12-1

Generate Piece Detail Records

Help Cancel Previous Next Finish

- 4) After the sort is completed, check the **Mail.dat** option in the Reports section of the **Presort Progress** screen and click **Save Files**. You will be prompted for a location in which to save the Mail.dat files. Remember this location, as you will need to upload files from there to the PostalOne! web site.
- 5) Log into your PostalOne! Account on the Business Customer Gateway.
- 6) On the landing page, click the **Electronic Data Exchange (PostalOne!)** link in the Design & Prepare section to display a page that will guide you through the process of uploading the Mail.dat files associated with your mailing.

Presort Progress

Presort Progress Follow the steps to sort, print reports, and output labels.

Job Information

Presort Template: First Class - Letter - Basic Elapsed Time: 00:00:06

Phase: Sort Completed

100%

1. Sort Information

Presort	Count	Trays
Level Automation	1,954	13
Level Single Piece	46	1
Level N/A	0	0
Level N/A	0	0
Remainder:	--	--
Total:	2,000	14

2. Reports

Required: Qualification Report Postage Report Drop Shipment Report Tray Labels Save to file Location...

Recommended: Presort Summary ZIP Code Listing Container Listing Mail.dat

3. Labels and Envelopes

Template: DA705

Description:

View Print... Save Files... View Print... Save PDF...

Help Close

AddressRight® Pro • Getting Started with the Intelligent Mail® Barcode

Mail.XML®:

Mail.XML® is a mailing industry standard specification for forms-based bi-directional exchanges between participants in the mailing process. The USPS® also accepts this electronic representation of the mailing as a replacement for the traditional hardcopy documentation.

- 1) Sort the mail list using the Presort Wizard.
- 2) Select menu item **Wizards > Electronic Documentation Wizard**.
- 3) Click **Next** on the **Welcome** screen.
- 4) In the **Submission Method** screen:
 - a. Select **Method** option **PostalOne! using Mail.xml**.
 - b. Enter your login information.
 - c. Click **Next**.

AddressRight Pro

Submission Method Specify method for submitting and updating mailing documentation.

Method

PostalOne! using Mail.xml

Mail.dat file

Login

PostalOne! User:

Password:

Save password

Help Cancel Previous Next Finish

- 5) In the **PostalOne! Information** screen:

NOTE: Most of the fields are automatically populated for you based on entries you made during presort setup.

- a. Fill in the missing information.
- b. Click **Next**.

AddressRight Pro

PostalOne! Information Specify the information needed to create Mail.xml documents.

Identification

Customer Reg. ID:

Contact

Name:

Phone:

Verification Facility

Identifier: ZIP+4 Code:

Submitting Permit

Permit Number:

Permit Type:

ZIP+4 Code:

Help Cancel Previous Next Finish

AddressRight® Pro • Getting Started with the Intelligent Mail® Barcode

- 6) In the **Submit Mailing Documentation** screen:
 - a. Select **Action** option **Submit Mailing**.

NOTE: Most of the fields are automatically populated for you based on entries you made during presort setup.

- b. Fill in the missing information.
 - c. Click **Next**.

The screenshot shows the 'Submit Mailing Documentation' window in AddressRight Pro. The title bar reads 'AddressRight Pro'. The window has a blue header with the text 'Submit Mailing Documentation' and 'Submit mailing documentation to the PostalOne! system.' Below the header, there is an 'Action' section with three radio buttons: 'Submit Mailing' (selected and circled in red), 'Modify Mailing', and 'Cancel Mailing'. Below that is a 'This Mailing' section with the following fields: 'Statement Num.: 155502', 'Mailing Title:' (empty), and 'Piece Weight: 1 oz(\$)' based on 1 piece(s). At the bottom of the window are five buttons: 'Help', 'Cancel', 'Previous', 'Next', and 'Finish'.

- 7) Review your settings in the **Electronic Documentation Wizard Summary** screen, then click **Finish** to submit your mailing documentation.
- 8) The **Submit Mailing Progress** screen is displayed while your mailing is being processed (Figure C).
 - a. You can view, print or save the Mailing Status report when the process is completed (Figure D).
 - b. Click **Close** to return to AddressRight® Pro.

The screenshot shows the 'Submit Mailing Progress' window in AddressRight Pro. The title bar reads 'AddressRight Pro'. The window has a blue header with the text 'Submit Mailing Progress...' and 'The mailing is being submitted.' Below the header, there is a 'Job Information' section with the following fields: 'Mailing Name: Copy of Sample List 2000.apl', 'Operation: Submit mailing to PostalOne!', and 'Status: Submitting Mailing'. Below that is a 'Progress' section with a progress bar that is 25% full. Below the progress bar is a 'Report' section with a checked 'Mailing Status' and buttons for 'View', 'Print...', and 'Save PDF...'. At the bottom of the window are two buttons: 'Help' and 'Close'.

Figure C - Submission In Progress

The screenshot shows the 'Submit Mailing Progress' window in AddressRight Pro. The title bar reads 'AddressRight Pro'. The window has a blue header with the text 'Submit Mailing Progress...' and 'The mailing is being submitted.' Below the header, there is a 'Job Information' section with the following fields: 'Mailing Name: Copy of Sample List 2000.apl', 'Operation: Submit mailing to PostalOne!', and 'Status: Successfully Submitted'. Below that is a 'Progress' section with a progress bar that is 100% full. Below the progress bar is a 'Report' section with a checked 'Mailing Status' and buttons for 'View', 'Print...', and 'Save PDF...'. At the bottom of the window are two buttons: 'Help' and 'Close'.

Figure D - Submission Completed