INTELLIGENT MAIL® FOR SMALL BUSINESS MAILERS (IM®sb)

USER GUIDE

Table of Contents

| OVERVIEW | 3 |
|-----------------------------|----|
| GETTING STARTED | 4 |
| Log In to IMsb | 4 |
| STEP 1: CREATE NEW JOB | 6 |
| STEP 2: UPLOAD ADDRESS FILE | 11 |
| STEP 3: ADDRESS PROCESSING | 15 |
| STEP 4: OUTPUT PROCESSING | 18 |
| STEP 5: SUBMIT JOB | 23 |
| ADDITIONAL FUNCTIONS | 27 |
| RESOURCES | |

OVERVIEW

Intelligent Mail for Small Business Mailers (IMsb) is an online tool which will allow you to produce the Intelligent Mail barcode (IMb) for mailings.

- Maximum mailing size is equal to or less than 5,000 pieces
- Maximum yearly volume is equal to or less than 125,000 pieces per permit.

The IMsb tool currently only supports MAADC prices for letters and AADC for flats.

• 3 and 5 digit pricing is *not* available when using the tool.

Start Simple

To use the IMsb, no special software or installation is required. Users simply access the application via a Web Browser.

The IMsb Tool has been specifically developed for small business mailers to meet Full-Service requirements.

The IMsb tool helps users generate their address blocks with the unique Intelligent Mail barcodes within the address block.

The IMsb tool is currently designed for First-Class and Standard Mail permit holders. The IMsb tool will generate the address blocks on the following formats:

- Multiple labels
- Multiple envelopes
- 8 ½ x 11 inch letter size paper
- Mail Merge option allows you to personalize your letters.

Get Connected

Mail is proven to be one of the most profitable marketing methods when used correctly. The IMsb tool helps optimize communication with your target audience.

- When you submit your mailing list via the IMsb Tool, it will automatically compare that mailing list to the USPS Address Matching system, in real-time.
- The Tool will notify you of inaccuracies in your mailing list and give you an opportunity to make adjustments ultimately, saving your business time and money and ensuring that your mail is successfully routed to your customer.
- Users of IMsb are provided with 24x7 access to manage their mailing activities.

Through the use of IMb barcodes, customers gain enhanced visibility into their mailing activities and receive discounts.

Grow Powerful

Nothing works better than the Power of Mail for building one-to-one relationships with your customers... or bringing in new ones.

The IMsb Tool is available free-of-charge and will provide the ability to create postage statements with electronic submission to the acceptance units.

GETTING STARTED

Prerequisites

Before using the IMsb tool, you need to make sure you have the following prerequisites completed:

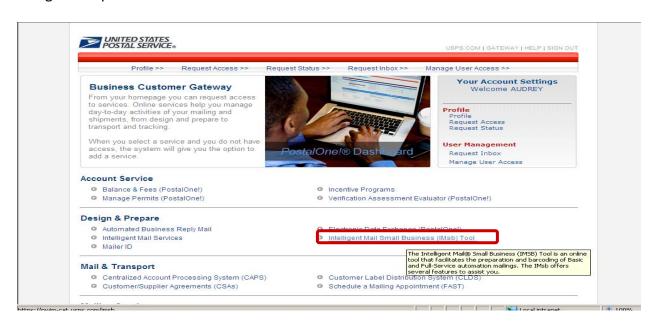
- Mailing Permit Mailer must have a postage permit, and use one of the following: Permit Imprint, Precanceled Stamps, Postage Meter
- 2. Business Customer Gateway Account
- 3. Customer Registration ID (CRID) Account
- 4. 9-digit Mailer ID (MID) Account
- 5. PostalOne!® Account

If assistance is needed on the above 5 prerequisites, please contact your local BMEU for assistance.

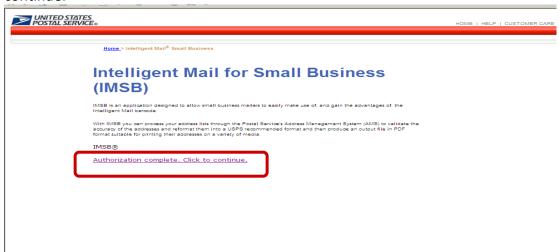
Log In to IMsb

Once you have the prerequisites described above, log on to the IMsb tool by:

- 1) Going to usps.com and select the Business Customer Gateway link (located at bottom of page).
- 2) Access IMsb by clicking the 'Intelligent Mail Small Business Mailing (IMsb) Tool' link within the Design & Prepare section.



From the Intelligent Mail for Small Business (IMSB) page, click "Authorization complete. Click to continue."



Read the terms on the 'Notice of License' and then click the "Accept" button to begin!



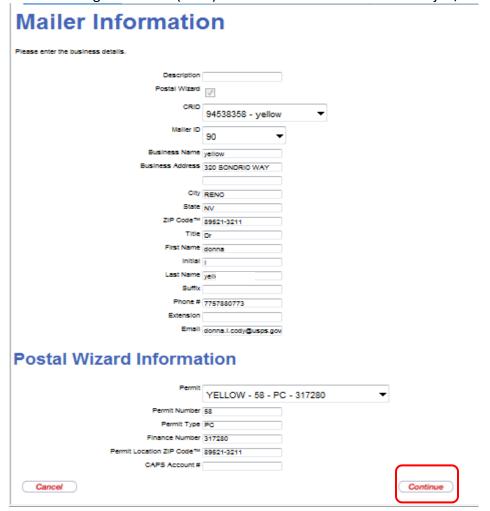
This is the landing page of the IMsb application. This page provides a brief description of the application, some of its features as well as the prerequisites for using the IMsb application.



STEP 1: CREATE NEW JOB

Select "Create New Job" from the Intelligent Mail for Small Business (IMsb) Tool page.

The first screen to appear after selecting **Create New Job** includes the Mailer Information and Postal Wizard sections. For the Mailer Information section you can select, via dropdown, which Customer Registration ID (CRID) and Mailer ID to be used for this job/mailing.

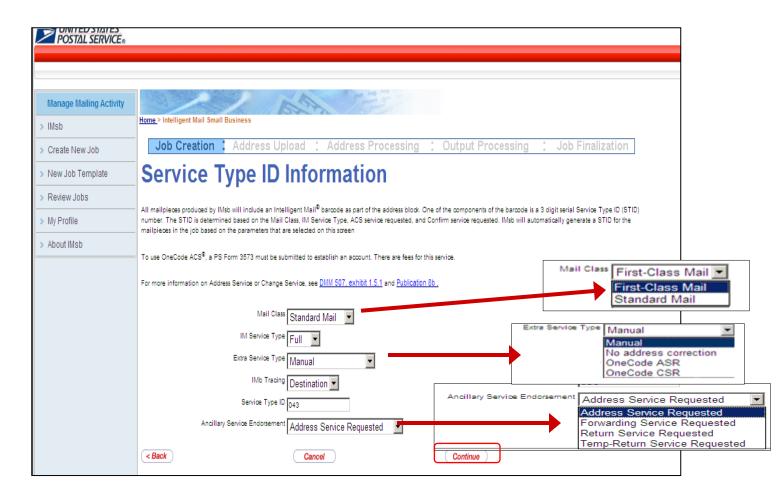


Upon clicking on Continue:

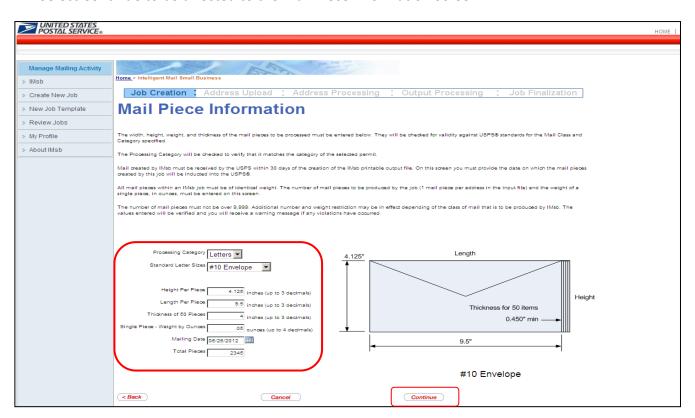
You will be directed to the Service Type ID Information Page, where you will make selections for the following: (1) Class of Mail; (2) IM Service Type (Full-Service or Basic Service); (3) Extra Service Type; (4) IMB tracing Service Type; (5) Ancillary Service Endorsement type.

The optimal or desired Intelligent Mail Service Type option is **Full-Service**.

- Items mailed under the <u>Full-Service</u> option offer additional benefits such as reduced prices and automated address correction service – and also must meet additional eligibility requirements.
 - Eligibility requirements for Full-Service include applying a unique Intelligent Mail tray barcode on tray and sack labels (which is supplied by the tool).



Select Continue to be directed to the Mail Piece Information Screen.



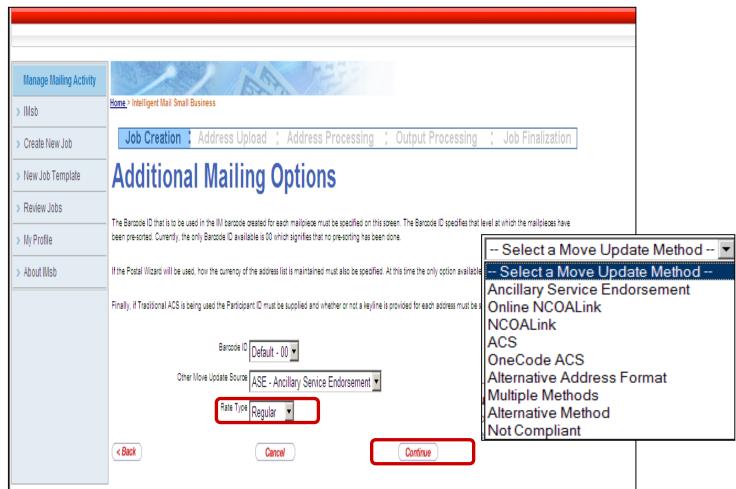
The Mail Piece information page lets you describe your specific mailing piece.

- 1. Select the Processing Category from the Drop Down menu.
- 2. Select the envelope size closest to the size of your mailpiece.
 - a. You will have the option to select a label size if so desired in a different section of the IMsb tool.
- 3. Enter the weight and thickness of the mailpieces to be mailed.
- 4. Select the **Mailing Date** on which the mailing/job will be brought to the Postal Service. Mailings prepared by IMsb must be received by USPS **within 30 days** of creating your labels or envelopes.
- 5. Enter approximate number of pieces to be mailed.

Click "Continue".

You will be directed to the **Additional Mailing Options** screen.

- 1. Select the Move Update Service Method for your mailing from the drop-down.
- 2. Select the Rate type.
 - a. If you are claiming **non-profit** rates, be sure to change the Rate type!



Click "Continue"

The Return address screen provides you with the option to print the return address on your mailpiece. If you already have the return address printed on your piece, you would not populate this section:

Note: The return address option is available to print on the following formats:

- #10 envelope
- 8.5x11 insert

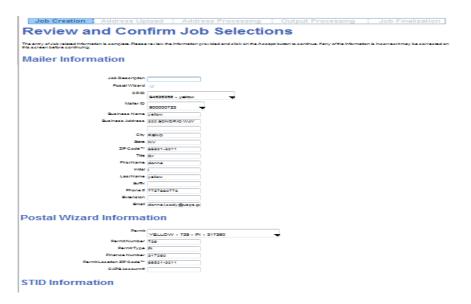
Note: The return address will not print if you select labels.



When finished with this page, select the continue button.

You will arrive at the Review and Confirm Job Section Page.

Note: Only some items can be changed or corrected from this page.



STID Information

To use OneCode &CS², PS Form SET3 must be submitted to establish an account. There are feet for this service.

For more information on Address Service or Change Service, see <u>DNN FOT, exhibit 1.5.1</u> and <u>Publication 80.</u>

Mail Class

Standard Mail

M Service Type

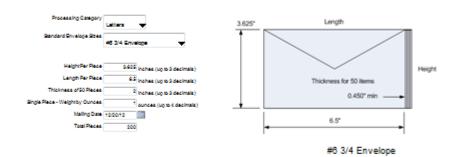
Full

Divers Service Type

Minutel

Minute

Mail Piece Information



Additional Mailing Information



Return Address Information



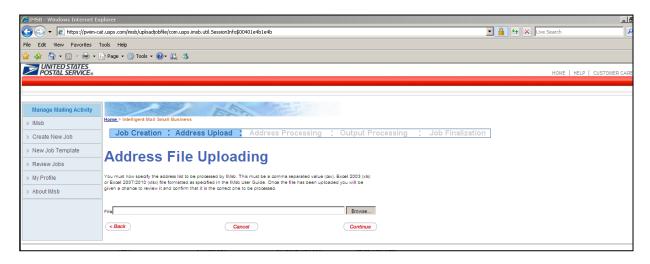
Upon clicking "Accept", a popup screen will display as shown below.

| Additional Mailing Information |
|---|
| Barcode ID Default - 00 |
| Other Move Update Source ASE - Ancillary Service Endorsement |
| Rate Type Regular ▼ |
| Return Address Information |
| Return Address Name IMSB Demo 1 |
| Windows Internet Explorer |
| Return Address - Address 123 Mair Select OK to submit the job request or Cancel to revise job selections. |
| Return Address - City Washingt OK Cancel |
| Return Address - State DISTRICT OF COLUMBIA |
| Return Address - ZIP Code™ 20280 |
| < Back Cancel Accept |

Click OK to submit your job request.

STEP 2: UPLOAD ADDRESS FILE

You must now specify the address list to be used in the mailing.



In order to upload an address list to the IMsb, the file must be in one of the following formats:

- Microsoft® Excel 2010
- Microsoft® Excel 2007
- Microsoft® Excel 2003
- Comma Separated Value (CSV)

For all of these formats, the first row in your file is called a <u>header</u> record. You create the columns that will be in the header record and then determine which fields will show up in the address block of your mailpiece. The following table describes specific field names that the IMsb looks for in the

first row (header record). Not all columns/fields are required. At a minimum your file must contain address, city, and state or address and city-state-zip header fields.

| Field Name | Description |
|--------------------|---|
| name | Recipient name, title, etc. or current resident. |
| company | Optional: Company name or current resident when choosing "no address correction" from the "Extra Service Type" option. |
| urbanization | Optional : Urbanization name used with some Puerto Rico addresses |
| address | Street address, PO Box (Example: 123 Main Street) |
| sec-address | Secondary address information (e.g. suite number, private mail box number, etc.). |
| city | City name |
| state | State name or 2 digit State name abbreviation (preferred) |
| zip | Optional : 5 digit ZIP Code [™] or 5 digit ZIP Code [™] plus ZIP + 4 [™] extension. If the ZIP + 4 [™] is provided it should be separated from the 5 digit ZIP Code [™] by a dash; e.g. 12345-6789. |
| city-state- zip | If the column is combined containing the city name, state name, and ZIP Code™, the city state and ZIP Code™ must be separated by at least one blank. If the ZIP + 4® is provided it should be separated from the 5 digit ZIP Code™ by a dash; e.g. 12345-6789. The city-state-zip field may be omitted if the last line components are provided in separate city, state and zip fields. |
| | |

Note:

- Field names are not case sensitive (e.g. name, NAME, Name, nAmE are equivalent).
- There is no required order in which the field must be defined within the file; i.e. the fields
 can be in any order within the records as long as they are in the same position (within all
 records) as denoted by the header record.
- The information will be included in the output address block in the following order:

Name: Mr. Bill Jones

company: DAISYS FLOWER SERVICE

urbanization (PR addresses only)OPTIONALsec-address:Third Floor

address: 475 LENFANT PLZA SW

city, state, zip: WASHINGTON DC 20260-0912

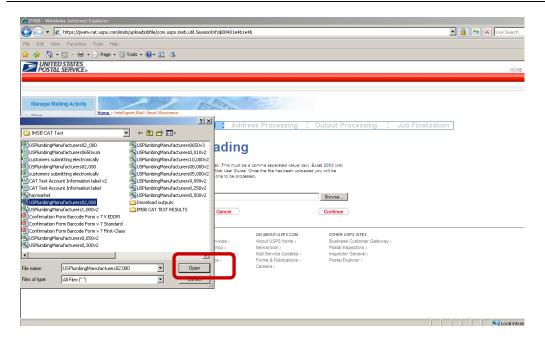
Your address list will be standardized by the AMS (Address Management System) process and some data that you provided may be corrected and/or combined. For example: suite or apartment numbers provided in the sec-address field will likely be appended to the address field data to provide a complete primary delivery point address.

When the files are in an accepted format (Excel 2010, Excel 2007, Excel 2003, or CSV) follow the steps shown on the IMsb Address File Uploading screen:

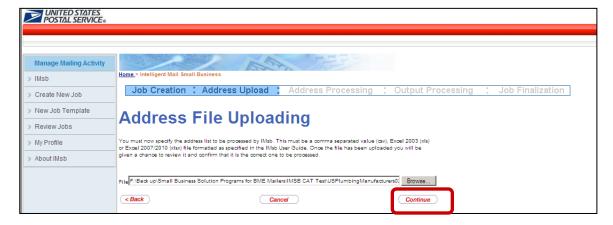
Select "Browse" to search for your Address List file on your computer.



Select the desired address list file from the pop-up window and click "Open".



Click "Continue"



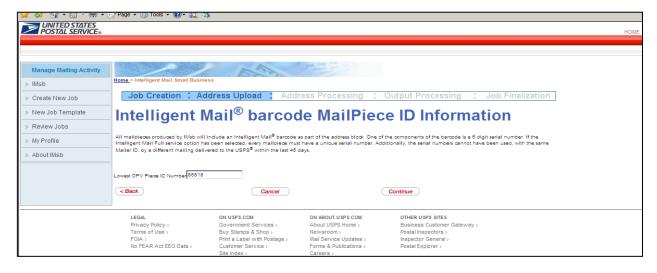
The IMsb tool will display the Address File Viewer on the Address File Uploading screen. The Address File Viewer table displays the pertinent information that IMsb will use to create address blocks for your mailpieces. You are required to confirm that this is the correct file before IMsb processes your addresses through the Address Management System (AMS) software (a system that matches your addresses to approved USPS addresses).



Click "Continue" to confirm this is the correct file.

At this point you will arrive at the Intelligent Mail® barcode MailPiece ID Information screen. All mailpieces produced by IMsb tool will include a unique Intelligent Mail® barcode as part of the address block. Once you produce these unique barcodes, they cannot be used again in a mailing within a 45 day period.

One of the components of the barcode is a 6 digit serial number. If the Intelligent Mail Full-Service option has been selected, every mailpiece must have a unique serial number. Additionally, the serial numbers cannot have been used, with the same Mailer ID, by a different mailing delivered to the USPS® within the last 45 days.

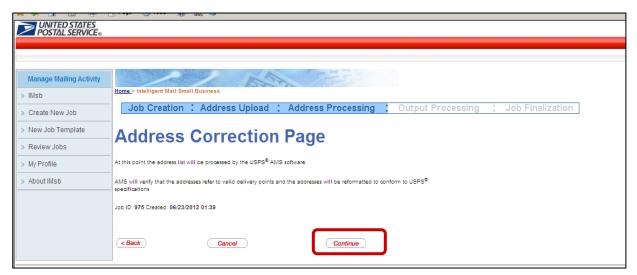


Click Continue to go to Address Processing

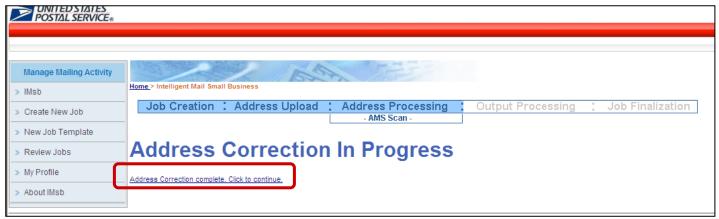
STEP 3: ADDRESS PROCESSING

AMS will verify that your addresses are valid addresses with the required delivery points. Your addresses will be reformatted to conform to USPS specifications.

Note: The AMS process only verifies that the address is a good delivery address; it does not check that the name/business associated with the address is accurate.



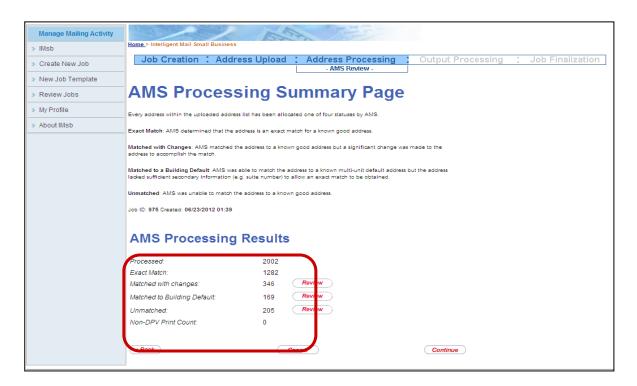
Click "Continue" to start the address correction process.



Note: After you click continues, it may take a few seconds for the IMsb tool to complete the address correction (depending on the size of the mailing). Once the address correction process is complete, you will see the "ADDRESS CORRECTION COMPLETE. CLICK TO CONTINUE"

By clicking the link above, you will be directed to the AMS Processing Summary Page. On this page, you will see data on your addresses. Each address within your address list is allocated one of four statuses by AMS.

- Exact Match- no correction was made by the USPS
- Matched with changes- The USPS added something to the address to make it correct.
- Matched to a building default- means its missing the apartment or suite #.
- Unmatched- Bad address according to USPS files.



At this point, by selecting the "Review" button, you may review the addresses in the matched with changes, matched to building default, unmatched addresses and non-DPV print count sections. During the review process you will have the option to take further actions regarding your address list. You also have the option to bypass the review process by selecting "Continue" if want the tool to accept the results returned.

- If you select any of the review choices, you will be taken to an AMS Default Entry Editor screen where, for each address, you can choose between using the AMS supplied address, the address you originally supplied, or not to have the IMsb tool print the address.
- If you choose to use an original address that does not match, it will be removed from the
 Delivery Point Validated (DPV) list and added to a non-Delivery Point Address list. The nonDelivery Point Address list will still be available for downloading; however the IMSB tool
 will modify those addresses STIDs to specify First-Class Mail. The non-DPV mailpieces will
 be mailed at the full single piece price.

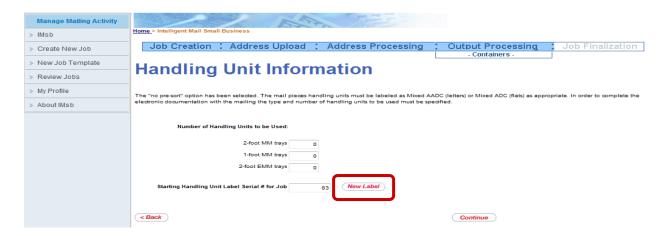


STEP 4: OUTPUT PROCESSING

The next step in the IMsb process is to prepare Intelligent Mail Tray labels, for Full-Service mailings. From the Handling Unit Information screen:

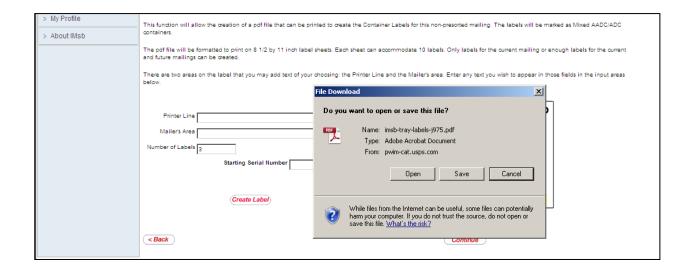
- 1. You will enter the number and type of Containers (Trays or Sacks) to be used to prepare this mailing.
- 2. The IMsb tool will populate the Starting Container Label Serial Number for the Job.
- 3. Click "New Label" for the IMsb tool to generate your Unique Intelligent Mail Tray Barcode (IMtb) Label.

Note: The tray labels must be generated using <u>card</u> stock or a <u>standard business card stock</u> which is perforated at 2×3.5 " such as an AVERY label 5371.



Optional: Enter the Printer Line information (if applicable) as well as the Mailer's Area information. **Required:** Enter the total number of Tray Labels to be generated and click "Create Label".







The **Downloads** screen shown below allows you to print your addresses on labels, envelopes or inserts. The addresses are provided in a .pdf format file which you can either open in Adobe® Reader or save to your computer.

Three labels sizes are available:

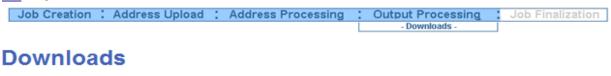
- Avery 5161 or equivalent to 1" x 4" label.
- Avery 5162 or equivalent to 1.33" x 4" label.
- Avery 5163 or equivalent to 2" x 4" label.

Envelopes sizes available: an update to the IMsb tool is planned which will allow optional sizing.

- #6 3/4
- #7
- #10

Insert option

<u>Mail Merge</u> -allows downloading of file to be used during mail merge option.



The results files produced by INsb are now available for retrieval. Files that can be retrieved are:

- the Delivery-Point-Validated addresses formatted to be printed on the specified mailing media (labels, envelopes, etc);
- full rate;

 the results from the AMS processing of the input address list, in csv, xis and xisx file forms

Job ID: 1784 Created: 12/13/2012 04:20

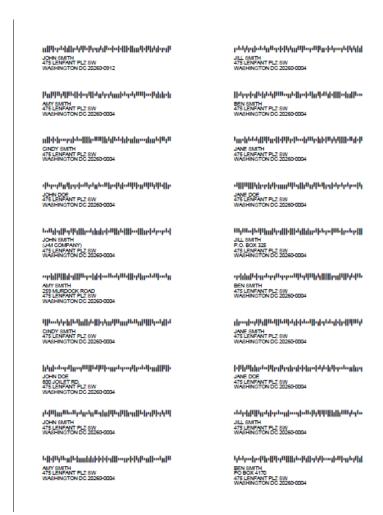
AMS Processing Results



Download Address File



Example of the PDF that will be generated upon choosing 1" Label as your output format.



Example of user selecting Number 6 3/4 Envelope from the output format:

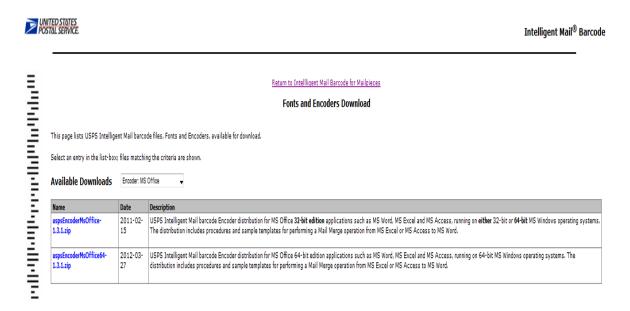


SAVE CORRECTED ADDRESS LISTS:



The IMsb tool allows you to save your corrected address list for future use: Downloading of:

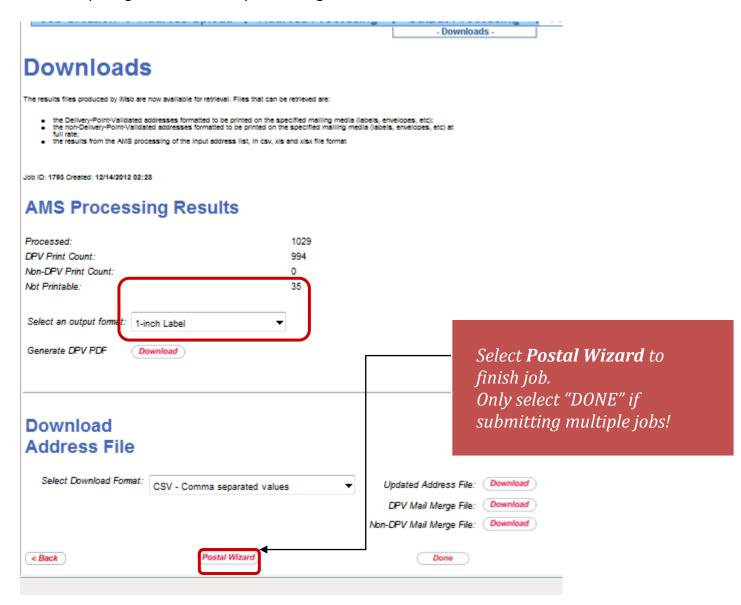
- 1. **Updated address list** will provide the updated address list to be saved in either a CSV or Excel for future use.
- 2. **DPV Mail Merge** allows you to merge the address block into a mail merge template.
 - a. The DPS Mail Merge file includes the unique intelligent mail barcode for each piece to be inserted on your mailpiece as long as the IMb font has been installed from the RIBBs page. (https://ribbs.usps.gov/onecodesolution/download.cfm)
 - b. The USPSIMB Standard Font should be set at 16pt font.
- 3. To download the font, go to https://ribbs.usps.gov/onecodesolution/download.cfm?downloads=Office&selection=5



4. **Non DPV Mail Merge** file allows for printing of bad addresses that can be mailed with a First-Class stamp.

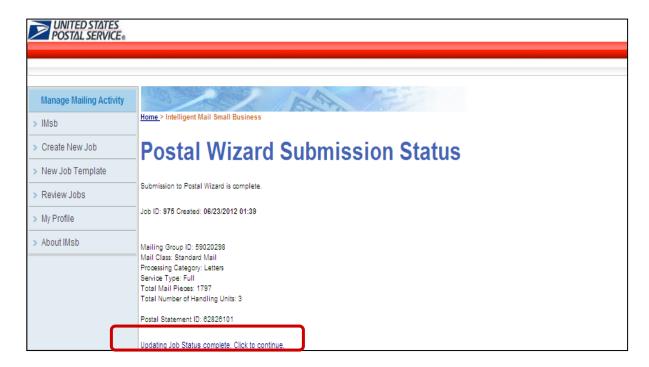
STEP 5: SUBMIT JOB

Click the **"Postal Wizard"** button on the bottom of the **Downloads** screen to generate the electronic postage statements for your mailing.

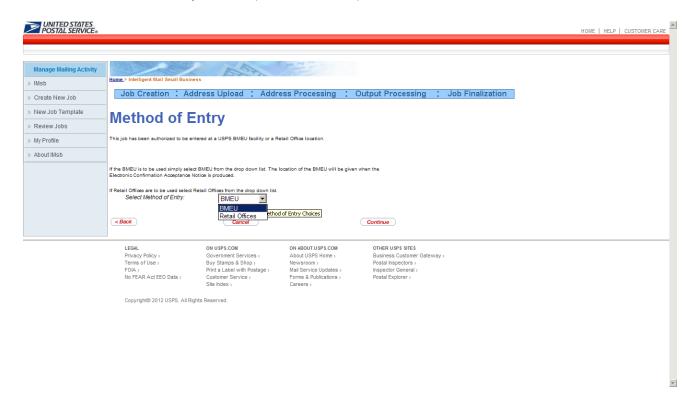


Very important to select Postal Wizard!

The screen below indicates that the IMsb Tool has sent your mailing information to *PostalOne!* Click the link, "Updating Job Status Complete. Click to Continue" on the bottom of the screen to finalize your job.

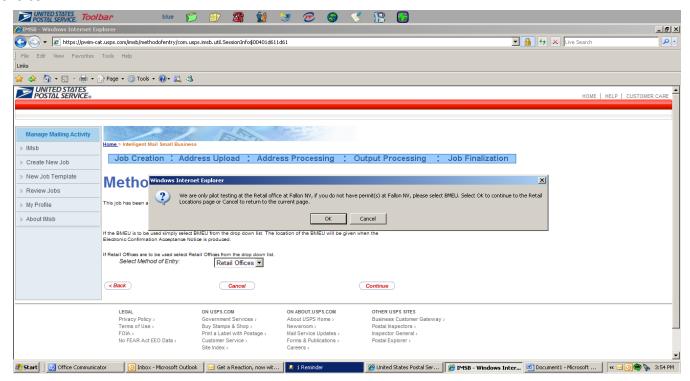


You are almost finished! Select the Method of Entry desired (BMEU or Retail).



When selecting Retail Offices, a pop-up message will appear that states: "We are only pilot testing at the Retail office at Fallon NV. If you do not have permit(s) at Fallon NV, please select BMEU. Select OK to continue to the Retail Locations page or Cancel to cancel to your job.

Note: When the Retail Option is fully deployed, you will be able to select the retail location of your choice.

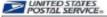


Review your mailing information, and then click the "Submit" button on the bottom of the page to upload your mailing to the *PostalOne!* system.

Print the *printer friendly* Electronic Confirmation Acceptance Notice (ECAN) and bring the notice along with your mailing to the site you have selected.







Electronic Confirmation Acceptance Notice

USPS Generated by Postal Wizard System Note to Maller: Your electronic postage statement was subr

Please print this form and present it along with your mailing to the Retail Office in FALLON, NV 120 N MAINE ST, FALLON, NV 894062930 by Dec 08, 2012.

The labels and electronic mailing information associated to this form, must match the physical mailing being presented to the USPS employee with this form.

presented to the USPS employ
Postage Statement ID:
Post Office of Permit:
Account Holder:
Account Number:
Permit Holder:
Permit Type:
Mailing Agent:
Mail Owner Permit Type:
Mail Owner Permit Number:
Customer Reference ID:
Mail Class:
Price Eligibility: 64263491 RENO,NV 88610-8651 YELLOW 1448080 1448080 YELLOW PI 739 YELLOW YELLOW PI 739

Price Eligibility: Processing Category: Mailer's Mailing Date: 11/08/2012

Actual Weight of Maller Declared Piece Weight: 0.0826 lbs, (1.0000 oz)

Total Mail Pieces: Total Weight: Total Postage Amount: 900 pos. 68.2600 lbs. \$ 249.30 1° MM Trays

Total Postage Amount to be Collected: Total Postage Amount - Prepaid by CAPS \$ 249,30

RETAIL Office of Mailing Hours

FALLON 120 N MAINE ST FALLON, NV 894062930 Mon, Tue, Wed, Thu, Fri 8:00 AM - 5:00 PM Sat Sun Closed

Note:
"This mailing may be subject to additional verification at the time of acceptance.
"This mailing can be processed at the self service terminal.
"...

Action

Please scan:

SCAN AT ACCEPTANCE



ADDITIONAL FUNCTIONS

Review Jobs contains a listing of the Jobs that the user has created on IMsb. Contains Job ID, Job Description, CRID, Mailer ID, Mailing Date, Business Name, Address and Contact. Also allows the information from a selected Job to be prepopulated into a new Job.

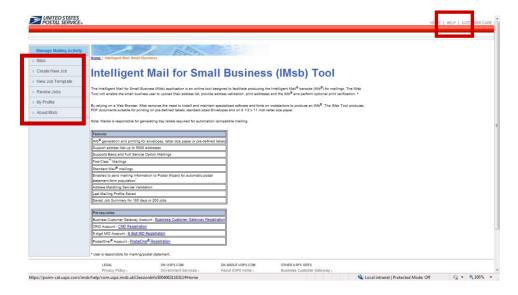


My Profile is a listing of all the CRIDs that the user has identified for inclusion in IMsb. Each of the CRIDs is profiled with the information that was identified in the Business Customer Registration (BCG) System including; addressing information, contact detail and all of the associated Mailer IDs.



Help Link

The "Help" link in the upper right corner provides additional information regarding the six buttons on the left side of the screen.



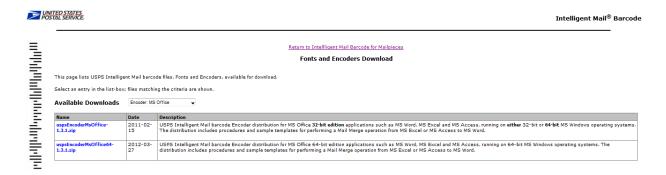
RESOURCES

1. The RIBBS Website

The USPS provides a number of technical and non-technical guides, informative documents and presentations, and other helpful tools to make it easier for you to take full advantage of the suite of Intelligent Mail barcodes. These valuable resources can be found on the USPS RIBBS website http://ribbs.usps.gov/

Additionally, you can find resources on how to download USPSIMB standard font for Mail Merge option. (16pt font)

https://ribbs.usps.gov/onecodesolution/download.cfm?downloads=Office&selection=5



2. Guides, Specifications and Manuals

For those new to Intelligent Mail services, there are several guides, specifications and manuals that will get you started and give a broad overview of the fundamentals of the program. Following is a list of primary sources of information.

Domestic Mail Manual (DMM)

This is the USPS manual that contains standards governing U.S. domestic mail services, descriptions of the mail classes and special services and conditions governing their uses, and standards for rate eligibility and mail preparation. Domestic mail is classified by size, weight, content, service, and other factors. http://pe.usps.com/text/dmm300/dmm300_landing.htm

A Resource Map to Intelligent Mail Documents

This lists all the documents and source materials that you will need to transition to Intelligent Mail services. It provides explanations of each document and information on how to find and print these documents. It is a reference source that will help you as you learn the ins-and-outs of Intelligent Mail services. This document can be found on RIBBS at http://ribbs.usps.gov/intelligentmail-guides/documents/tech-guides/ResourceMapToIntelligentMail.pdf

A Guide to Intelligent Mail for Letters and Flats

This guide provides guidance on how to prepare your mail and electronic documentation and identifies the data that will be provided at no additional charge for Full-Service option compliance. In addition, the Guide also describes what will be available in the first release of Intelligent Mail services. A Guide to Intelligent Mail for Letters and Flats can be found on RIBBS at http://ribbs.usps.gov/intelligentmail-guides/documents/tech-guides/GuidetoIntelligentMailLetter-sandFlats.pdf

User Access to Electronic Mailing Information and Reports Guide

The purpose of this guide is to provide information regarding Intelligent Mail Full-Service option reports and a walk through of the new Business Customer Gateway webpage, which will be accessible through the USPS.com home page. This guide is available on RIBBS at https://ribbs.usps.gov/intelligentmail-guides/documents/tech-guides/user-access/user-access.htm

3. Personal Support Resources

In addition to the guides and specifications listed above, you can also get help from USPS Intelligent Mail service experts.

To find your local **Business Mail Entry (BME) Manager**, go to the Business Mail Acceptance page: https://ribbs.usps.gov/index.cfm?page=bma

To find your local **Mailpiece Design Analyst (MDA**), go to: http://pe.usps.com/mpdesign/mpdfr mda lookup.asp

OneCode Confirm. Learn about the Intelligent Mail barcode format for OneCode Confirm by reviewing the Confirm Service Featuring OneCode Confirm User Guide (Pub. 197). For more information on the Confirm service, please call the Confirm Customer Help Desk at 800-238-3150, option 1 or visit https://mailtracking.usps.com or visit RIBBS at https://ribbs.usps.gov/index.cfm?page=intellmailonecode

OneCode ACS. Learn how the process works, the features available, and mailer requirements to receive electronic address corrections using the Intelligent Mail barcode. Downloadable OneCode ACS application and fulfillment access forms. For more information on the OneCode ACS, please contact the ACS Department via email at acs@usps.gov or by phone at 877-640-0724 or visit RIBBS at https://ribbs.usps.gov/acs/documents/tech_guides/

To contact the *PostalOne!* Help Desk call **1-800-522-9085**. For additional information about IMB Tracing please contact the National Customer Support Center at (800)238-3150.