How to prepare First-Class Mail with





How to Prepare First-Class Mail using MAILERS+4

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Welcome to Direct-Mail Marketing with MAILERS+4

This manual provides you with a checklist of the steps necessary to process a mailing for the automation and non-automation First-Class Mail® discounts possible using MAILERS+4. It includes a list of important elements required to get you started as a direct mailer, from mailpiece design for postal automation compatibility, to properly packaging the mailpieces in their containers and taking them to the post office.

This information can also be found on the MAILERS+4 DVD-ROM in tutorials folder. You can view a tutorial or print out a .pdf file of a publication. Other informative sources are the MAILERS+4 Manual, How to Prepare a Standard Mailing Using MAILERS+4 publication, and the Quick Start Guide.

Good luck with your direct-mail marketing initiative.

First-Class Mail Consists of three subclasses

- Postcards
- Letters, Cards
- Flats

Rules

- At least 500 sorted, addressed pieces, all the same size, shape and eight.
- To encourage barcoding, automation rates are lower than Presorted rates.



MAILERS+4 offers you a double benefit: it is a powerful program that can process your mailing for the best discounts possible; and it is a unique, versatile program that can enhance your database for an efficient, successful direct marketing campaign.

Step 1 — What You Need to Get Started

Checklist:

- Obtain a First-Class Mail Permit from your local post office.
- Determine payment type and obtain authorization from the post office.
- ☐ Get materials and supplies from the post office, including rubber bands, trays and sleeves.
- Purchase tie straps.
- □ Pick up any books or pamphlets including the Quick Service Guide (Pub 95).
- Obtain a mailing list or sales leads that target your market.

Obtain a First-Class Mail Permit

You must have a valid mailing permit before you can mail at presorted postage rates. You'll pay a fee when you apply and when you renew the permit. You can get Form 3615 from any Business Mail Entry Unit (BMEU) or Postal Business Center (PBC), but you must turn it in at the post office to which you will bring your mailings.

How to Apply - complete and turn in the application: Form 3615, Mailing Permit Application and Customer Profile. When you apply for your permit, you will need to know which postage payment method you want to use.

Determine Payment Type

Precanceled Stamps

If you want your mailing to look more personalized, use precanceled stamps.



Meter

Using a postage meter is a convenient way to pay for postage.

Meters are leased from authorized manufacturers.



Imprint

A permit imprint is a popular way to pay for postage. Instead of using stamps or a meter to print postage on each piece, you can have permit imprint information— called an

PRESORTED FIRST CLASS U.S. POSTAGE PAID NEW YORK, NY PERMIT NO. 1

indicia- printed in the upper right corner of the mailpiece.

Database Files

To process a mailing using MAILERS+4, you will need a database file. You can open the file directly into MAILERS+4, or create a new one from scratch.

Payment Types and Requirements

	Form 3615	Other	Other	
	(Yearly fee)	Fees	Forms	
Stamps	Х			_
Imprint	X	Χ		
Meter	X		3601-A	

Data Entry Using MAILERS+4

- 1 Click Database > Create.
- Select the preset Quick: Common Fields and click OK to create an empty data structure. Save the empty database in an appropriate location.
- 3 Select the **Format Fields** button. Click
 - AutoFormat and then **OK** to format the fields in your new database.
- 4 Click Tools > Data Entry > Design View. A data entry template will appear. Select File > Save View to save and close the template.
- 5 Click **Database > Append**. Enter the names and addresses of your mailing list and click Save after each record.

What if I don't have a database or sales leads?

If you do not have your own mailing list, finding the right leads may take some effort if you do it on your own. At Melissa Data, our Sales Leads specialists are eager to help you compile a list that best meets your needs.

Melissa Data offers Occupant, Business and Residential Mailing Lists, as well as targeted Specialty Sales Leads.

> For more details, call 800-635-4772 or visit www.MelissaData.com/Lists

Step 2 — Designing Your Mailpiece

Checklist:

- Verify your mailpiece qualifies for automation compatibility.
- Measure your mailpiece to determine if it qualifies for letter or flat rates.

The size of your mailpiece will determine the rates available to you. The major processing categories of Standard Mail (A) include letters or cards and flats. All the pieces in your mailing must be the same size, shape, and weight.

Making Your Mailpiece Automation Compatible

Making your mailpiece automation-compatible is important. Automated equipment can process mail quickly and more efficiently than manual operations can, allowing the Postal ServiceTM to set lower rates for these pieces and increase delivery time.

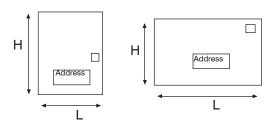
Your automation-compatible mailpiece should:

- Meet size and weight standards.
- ✓ The aspect ratio (length divided by height) is between 1.3 and 2.5 to 1.
- Be made of good quality white or lightcolored paper.
- Contain no sharp items including staples.
- Contain no bulky items larger than 1/4" thick.
- Be sealed securely with wafer tabs if applicable.
- ✓ Be readable by automation equipment.

How to Measure Your Mailpiece

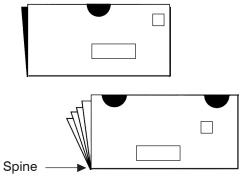
The length is the edge that runs parallel to the lines of the delivery address. The height is the perpendicular edge.

Self-Mailers and Booklets



Mailpieces that are designed to be mailed without envelopes are called self-mailers or booklets. For these pieces to claim letter automation rates, their open edges need to be fastened together. This prevents an open edge from jamming the high-speed processing equipment.

One of the easiest ways to keep the edges together is to use tabs or wafer seals, but you can also use tape or glue. Remember, staples are not permitted. The placement of the tabs depends on the weight (thickness) of the paper.



For detailed instuctions on using tab or wafer seals see QSG 201b and DMM 201.3.14

Letters

Although the post office allows letter mail to be a maximum of 11.5" in length, to ensure accurate and efficient processing, the USPS recommends your letter size mailpiece be less than 10.5" in length.

6-1/8" 6-1/2" 5" 11-1/2"

 Min
 Max

 Length:
 5"
 11 1/2"

 Height:
 3 1/2"
 6 1/8"

 Thickness:
 0.007"
 0.25"

 Weight:
 up to 3.5 ounces. Some

restrictions apply, verify with

your post office.

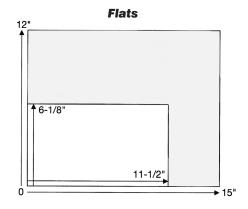
Automation letters must maintain an aspect ratio (height ÷ width) between 1.3 and 2.5.

Minimum and Maximum Sizes

Use the following chart as a guide when designing your mailpiece. Be aware of the differences between letter mail and flat mail, and check with the USPS regarding the differences in postage rates. For example, if you design a newsletter as an 8.5 x 11" piece,

Cards

Thickness, stiffness, and tear strength are the most important machinability characteristics for cards. Be sure to use at least a 75 pound card stock with a minimum thickness of 0.007".



	Min	Max
Length:	11 1/2"	15"
Height:	6 1/8"	12"
Thickness:	0.25"	0.75"
Weight:	less than 1	13 ounces
One dimension	n must exce	ed at least one
of the letter-si.	ze maximun	ıs.

then you will pay flat rates. If you fold the newsletter in half as an 8.5 x 5" self-mailer, you will pay lower letter rates. This booklet will describe how to process and mail letter size pieces in more detail.

Additional Resources
DMM 101, 201.3
QSG 201a, 201b, 301a
Notice 3-A, Letter-Size Mail
Dimensional Standards Template

Step 3 — Cleaning Your List Before You Mail

Checklist:

- Standardize addresses and add ZIP+4 Codes according to USPS requirements.
- □ Perform NCOA processing.
- Remove costly duplicate records.
- □ Print CASS Form 3553, sign and date it.

Maintaining Accurate Addresses

Cost-effective, consistent, and timely delivery of every mailpiece depends on an accurate address that is complete and correct in all its elements. An incomplete or inaccurate address needs additional handling, including manual processing, which can delay delivery and increase cost.

Address Hygiene

The addresses in an automation-rate mailing must be matched using a Coding Accuracy Support System (CASS)-certified process within 6 months before the mailing date. MAILERS+4 Address Check does this process for you.

The USPS requires that 100% of your automated mailing be CASS certified.

Verifying Addresses Using MAILERS+4

MAILERS+4 makes the process of standardizing addresses and adding ZIP+4 Codes simple and easy.

- 1 Click the **Address Check** button. Select appropriate options for this mailing, and click **Go**.
- 2 MAILERS+4 verifies your addresses against the USPS National Database and displays the results.
- 3 Select **Resolve Addresses** and highlight the address you want to resolve.

CASS Form 3553

	STATES SERVICE»		4	his form may be generate sing CASS-Certified son stabuse files. Any facel ormat as the printed for	frware in co inile must o			
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IdChange Ceviling	Company Name			5. IdChange Certified Sol	fivare Name	C Version	6. Configuration	
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C. eLOT Cestified Company Name			11. #107 Certified Softwo			12. Configuration		
elissa Data				AddressObject vers				
exis certifies comp	sany Name			2. MARE CONTINUE SURFAM	re Mane, Ver	sion & Model No		
					4. MLOCK Serial No.			
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b. EsChange		01/29/2008	07/27/2008	-	2566	01/21 From	7/2008 01/28/2009 To	
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- 4 Click **Resolve**. Here you can edit the address and search the database for possible matches.
- 5 Find and highlight the listing that matches the **Range**, **Directional**, and **Street Name** for your record.
- 6 Click **Replace** to resolve the error, replace the address data in your list, and add the ZIP + 4 code.
- 7 When you are finished resolving addresses, click on **Close**.
- 8 Click **CASS (Form 3553)** and complete the on-screen information.
- 9 Select **CASS Print** and your CASS Form 3553 is ready for you to take to the post office.

Address Change and Correction Services

National Change of Address (NCOA^{Link}) is a move-update service that lets you update your database with the most current forwarding information (for individuals, families, and businesses that have moved) before you mail.

Approximately 15% of the people in your database move every year. Update your records with NCOA^{Link} move-update service from Melissa Data and catch all the movers in your database.

What about addresses that cannot be standardized, or do not have a ZIP + 4 Code?

Direct mailers have three choices when addresses cannot be resolved (coded.)

- Do not mail to those people.
 Depending on your mailing initiative, it may not be necessary to mail to them.
- 2 The mailpiece is sent at a higher non-automation rate. The MAILERS+4 presort will separate the addresses accordingly.
- 3 You can attach a stamp and mail it at First-Class single piece rate.

For more details, call 800-635-4772 or visit www.MelissaData.com/NCOA

Preparing Your List for Servicing Using MAILERS+4

- 1 Click Services > Change of Address.
- 2 MAILERS+4 launches the ListWare application. Select applicable payment options.
- 3 Format the required fields and start processing your list.
- 4 ListWare will assemble and compress your list. Submit the compressed file to Melissa Data via ListWare or using FTP or E-mail.
- 5 Update your original list with returned data. Melissa Data will notify you via email or telephone when your file is ready for return. Average turnaround is within 24 hours.

Identifying Duplicates Using MAILERS+4

- 1 Click the **Duplicate Check** button.
- 2 Select the search criteria that you want MAILERS+4 to use to find the duplicate records and click **Go**.

MAILERS+4 will process and compile the duplicate records.

- Wiew the duplicates on screen for editing, or **Print** out the results report for future attention.
- 4 To edit records, or mark records for deletion, refer to the User's Manual.

How do I remove duplicates from my list?

When you run duplicate check and select "Mark records for deletion" MAILERS+4 will only flag the duplicate records. In order to permanently remove them:

- Click the Browse button to verify the marked records. (Indicated by the checkbox.)
- 2 Go to Database > Pack and select "deleted" records.
- 3 It is recommended to make a backup before processing. Packing will permanently remove the records from your list.
- 4 Make sure you print the CASS form before packing, or you will need to run Address Check again. Running Pack invalidates the CASS form.

Step 4 — Presorting For Postal Discounts

Checklist:

- Measure and weigh your mailpiece and enter in the correct data in the Presort Wizard.
- ☐ Select the appropriate presort categories to sort to.

Sortation Categories

You can receive a larger discount on postage if you share the work of processing the mail. When you do some of the preparation and sortation, it saves the Postal Service time and money and they pass the savings on to you.

To receive automation rates, addresses must be CASS processed, have a ZIP + 4 Code, and labels must be barcoded.

To receive non-automation rates, addresses must have a valid 5-digit ZIP Code and presorted packages must be rubberbanded.

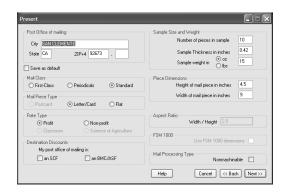
Miscellaneous pieces are known as residuals when the addresses have an invalid ZIP Code, no ZIP at all, or have international addresses.

Presort For Postal Discounts Using MAILERS+4

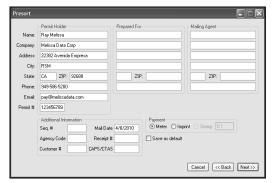
- 1 Click the **Presort** button.
- Select {- New Mailing -} and click Next>>.



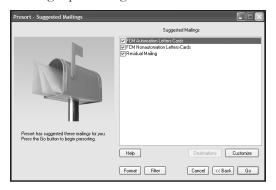
3 Fill in **Post Office of Mailing** information. (This is where you obtained your bulk permit.) You should **Save as Default** if this is the primary post office you use for bulk mailings.



- 4 Mark your selections for Mail Class, Mail Piece Type and Rate Type.
- 5 The information you place in the Sample Size and Weight screen is very important for accurate tray sortations and weight rates. Enter the information as accurately as possible and choose Next>>.
- 6 Complete the Postage Statement Information including the permit holder and payment type. Click **Next** >> .



7 The Suggested Mailings listing will show you what Presort levels your list may qualify for, and what levels it will attempt to sort to, in descending order from the lowest rate. Now click **Go** to begin presorting.



How do I accurately measure my mailpiece?

- Take 20 assembled mailpieces (including labels, inserts, and rubberbands) and flatten them by hand and release.
- 2 Measure the height of the stack to the nearest 1/8 inch and enter this amount as the thickness.
- Weigh the same 20 pieces to the nearest 0.0001 pound or 0.1 ounce and enter this amount as the weight.
- 4 Enter in the height and width of the piece.
- 5 MAILERS+4 will do the calculations per piece and enter this information on the postage statement.

Step 5 — Forms You'll Need to Take to the Post Office

Checklist:

- □ Review the Qualification Report and Postage Statement and make a copy for your records.
- Prepare to pay the amount of postage due on the Postage Statement.
- ☐ Sign the Postage Statement certifying you are in accordance with all USPS rules and regulations.

Postal Forms and Reports

Documentation must be generated by PAVE certified software like MAILERS+4. PAVE (Presort Accuracy Validation and Evaluation)

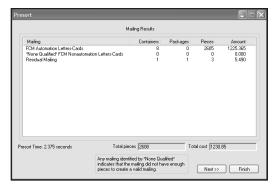


certified by the USPS means MAILERS+4 meets the standard of excellence for presort software. Certification at the Gold level is your guarantee that MAILERS+4 surpassed the standard qualification criteria for presorting and accuracy that includes First-Class, Standard Mail, and Periodicals.

Printing Postal Forms Using MAILERS+4

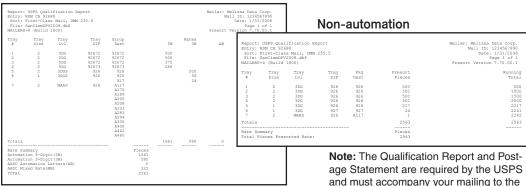
After running Presort, the Mailing Results Summary screen will show you the following:

- The rate levels your mailing qualified for after presorting.
- The number of pieces and cost at each rate.
- Your Total Cost and Savings of the mailing compared to single piece First-Class postage. Click Next >>.



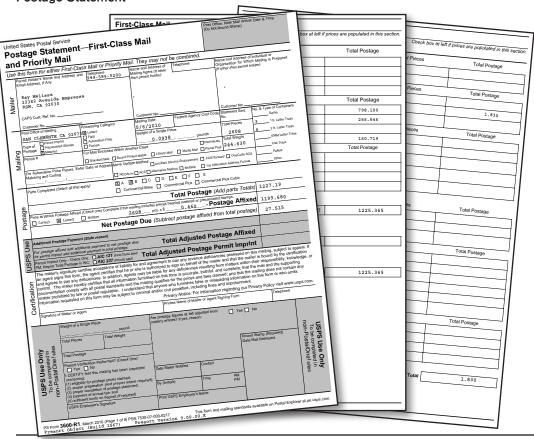
- 1 Print the Qualification Report for all of the presorted mailings listed. Highlight one mailing at a time (ie: FCM Automation Letters), select **Qualification Report** and click **Print**.
- 2 Select Postage Report>>, highlight the qualified mailings you want to mail and then Print to get the required Postage Statement.
- 3 Click Finish.

Qualification Reports: Automation



post office.

Postage Statement



Additional Resources
Form 3600 Postage Statement
User's Guide Chapter 9, 11

Step 7 — Printing Required Tray Tags for Containers

Checklist:

- Ensure tray tags are printed on correct paper stock, color, and size.
- □ Verify barcodes are not truncated when torn apart, if using pre-perforated paper.

Printing Tray Tags Using MAILERS+4

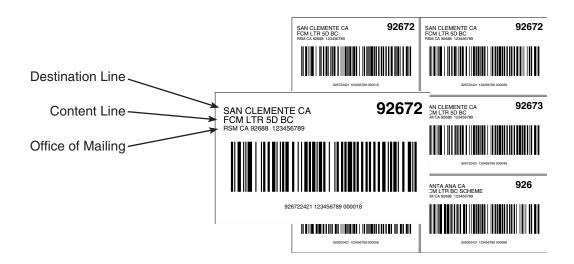
- While still on the Presort Reports screen, select **Tray and Sack**.
- 2. Click Print.

Tray Tag Information

Destination Line — shows the city, state, and ZIP Code (3 or 5 digits) of the destination postal facility. When required, the destination facility prefix (for example, "ADC") is used.

Content Line — shows the mail class, processing category, and other information required.

Office of Mailing — shows the origin or entry post office.



Step 6 — Printing Your Address Labels

Checklist:

- Verify the data on the label is printed according to USPS guidelines.
- □ Verify automation barcodes are not truncated and have 62 bars (POSTNET) or 65 bars (Intelligent Barcode).

Formatting Addresses Correctly

While formatting your label, keep in mind the optical character reader (OCR) scans an address from the bottom of the mailpiece to the top.

The Postal Service will deliver the mail to the address designated on the delivery address line, which is always the line immediately above the city, state, and ZIP + 4 line.

RICHARD SCHECHNER®

SCHECHNER ENGINEERING CORP®

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CAMBRIDGE MA 02139-4301

CAMBRIDGE MA 02139-4301

77 MASSACHUSETTS AVE STE 36

Using Proper Type Style

- In order for your addresses to be easily read by OCR's, be sure to use the following guidelines.
- Use simple sans serif type (like Arial) with uniform thickness.
- No bold, italic, extended or condensed type styles.
- Point size between 10 -12 points.
- No kerning or overlapping of characters or words too close together.
- Address block cannot be skewed more than 5 degrees. Be careful when attaching labels.
- Using uppercase characters throughout the address block is preferred over initial or title caps.
- > No punctuation.
- Left-justify every line in the address block.
- > Use two-letter state abbreviations.
- ➤ Use one space between the city and state, two spaces between the state and ZIP + 4 code.

What are the Elements of an Address

Label?

- City, State Zip+4
- Delivery Address
- Suite / Apartment
- 4 Company
- Name / Attention
- 6 Optional Endorsement Line
- Intelligent Barcode
- 9 POSTNET Barcode

Do I need an Optional Endorsement Line?

An Optional Endorsement Line can save you time and money. Instead of applying stickers, MAILERS+4 will print the endorsement information on the label to make packaging easier.



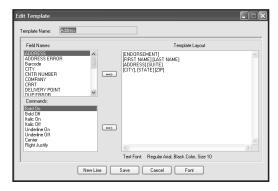
3 = 3-DIGIT 123

X = MXD ADC 123

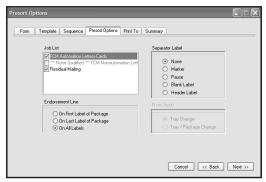
 \triangle = ALL FOR ADC 123

Printing Address Labels Using MAILERS+4

- 1 Click the **Print Address Labels** button.
- Select the appropriate label description from the list by highlighting it. (i.e. Avery 5161) Select **Next>>**.
- 3 At the Template tab, create a new template. Place the appropriate fields for your label design by double-clicking the Field Names. Save your template and click Next >>.



4 Select the following Sequence commands: Presort Order, Normal Sequence, All Pages and click Next >>. 5 Select the following Presort Options: The mailings from the Job List you wish to mail; print the Endorsement Line on all pieces; and a Header Label between tray changes. Select **Next>>**.



- 6 Select a compatible printer driver from the listing. Selecting Windows Driver is best for small ink jet and laser printers and will use your default printer in Windows Control Panel. Select **Next** >>.
- 7 Click **Preview** to verify your labels will print as expected, and click **Print** to start printing labels.

Additional Resources

Pub. 28 Postal Addressing Standards Notice 67 Automation Letters Template DMM 602, 708 QSG 708 User's Guide Chapter 10

Step 8 — Putting Labels on the Mailpiece

Checklist:

- □ Peel labels in order from left to right, top to bottom.
- Keep labels and mailpieces in the same order as the Qualification Report.
- □ Place labels in the proper location— with less than five degree correct skew— on the mailpiece.
- □ Ensure OCR readability according to USPS guidelines.

Mailpiece Clear Zones

Several places on the address side of a mailpiece are reserved for addressing and related information only. Always have your post office check the validity of your mailpiece before applying labels.

OCR Read Area — Extraneous (non-address) printing in the OCR read area can cause the rejection of the mailpiece. Be sure to have at least 1/2" all the

way around the label.

You may place non-address printing such as company logos, advertising, and die cuts within the OCR read area only if you position this printing so that the lowest point is above the delivery address line.

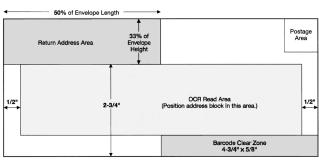
Return Address — The return address must be above the OCR read area and should be printed in a type size smaller than the type size used in the delivery address.

Barcode Clear Zone — To ensure that the barcode is readable by barcode sorters, the barcode clear zone must be clear of all printing, markings, and colored borders.

Address Labels

Be sure to use address labels that are at least 3" long to ensure proper fit of the barcode. When applying labels to your mailpiece, be sure to place the label as straight as possible within the OCR read area so there is less than a five degree skew.

********************5-DIGIT
Recipient Name
Delivery Address
City State ZIP Code



(Not Actual Size)

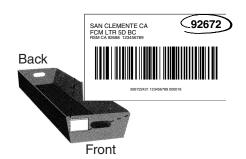
Step 9 — Assembling Your Mailpieces Into Containers

Checklist:

- Insert barcoded tray tags into holders.
- Place mailpieces into trays according to the Qualification Report.
- Sleeve appropriate trays.

First - Label Trays

Place a tray tag securely in the label holder on each tray. Do not tape labels onto trays or label holders. Do not make handwritten changes to preprinted barcoded labels—the machines read only the barcode.



Trays usually come in 1-foot and 2-foot lengths. Look at the Qualification Report in the "Tray Size" column to determine which to use.

When placing pieces or packages into trays, make sure the addresses face the front of the tray.

A200 A208

A233

A283 A294

A330

Second - Prepare Automation Sorts

It is easiest to start assembling the automated pieces first because packaging is not allowed. Since the endorsement line reflects each tray, match up pieces to the "Tray Zip" and "Tray Level" categories on the Oualification

Entry: RSM CA 92688 Sort: First-Class Mail, DMM 235.6 File: SanClemDPV2008.dbf MAILERS+4 (Build 1800) Tray Trav Trav Tray Group # Size Lvl ZIP Dest 5DG 92672 92672 2 2 5DG 92672 92672 3 2 5DG 92672 92672 92673 2 5DG 92673 3DGS 926 926 3DGS 926 926 927 926 MAAD A117 A170 A189

Report: USPS Qualification Report

Report and place the mailpieces into the tray. Pieces in full trays should not be rubberbanded.

In this example, place the groups from 92672 into the tray labeled 92672.

*****5-DIGIT 92672
Recipient Name
Delivery Address
City State ZIP Code





Third - Prepare Non-Automation Sorts

Entry: Sort: File:	RSM CA 926	s Mail, DMM 2008.dbf	-		
Tray #	Tray Size	Tray Lvl	Tray	Pkg Dest	
1	2	3DG	926	926	
2	2	3DG	926	926	
3	2	3DG	926	926	
4	2	3DG	926	926	
5	1	3DG	926	926	
6	1	3DG	927	927	
7	2	MAAD	926	A117	
l				7170	

In this example, each 3-DG package gets placed into its respective tray. The remaining packages get placed into a final mixed tray.

Next, assemble the package-based non-automation mailing. Now, the endorsement line reflects packages, not trays. These non-barcoded pieces

must be rubberbanded according to the groupings, "Package Destination," on the Qualification Report and then placed in their

926

corresponding trays.



How do I rubberband packages?

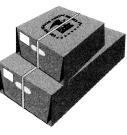
If your package is 1"-6" thick, place the first rubberband lengthwise, and the second rubberband around the height.

If your package is less than 1" thick, only place one rubberband around the height.



Fourth - Sleeve & Strap Trays

Sleeve all the trays and strap non-local trays for transport. Strapping is not required for trays going to your local post office. See your Business Mail Entry Unit (BMEU) manager for details.



Step 10 — Take It All to the Post Office

Checklist: Signed CASS Form 3553. Signed Postage Statement. Printed Qualification Reports. Sleeved and strapped trays. Payment ready. Deposit mail early in the day. Pick up extra supplies.

Verification & Acceptance of Mail

All presorted mailings are deposited at their designated Business Mail Entry Unit (BMEU) or drop points with completed, accurate postage statements.

Business mail acceptance clerks will make sure your mail is properly prepared so that the Postal Service can efficiently process and deliver it. They will check your mailing for correct postage payment, correct endorsements, proper addressing, and the contents' eligibility for the class of mail indicated. They will also check to see whether the mail is properly sorted and barcoded.

If problems are discovered with the preparation of your mailing, you may correct the errors, or pay additional postage to compensate the Postal Service for the errors found.

Remember, the BMEU acceptance staff is there to help you. They want your mailing to be a success. Using First-Class Mail for direct mail delivery is the most effective, efficient way to communicate with your customers and prospects. As you gain experience preparing mailings, you'll see how easy it can be.

Sources of Postal Information

Business Mail Entry Unit (BMEU)

Name of Unit Manager	Extension
Additional Contact	Extension
Address	
Telephone Number	
Telephone Number (Account Balance Inf	ormation)
Hours of Operation	

Postal Business Center (PBC)

Hours of Operation

Melissa DATA

22382 Avenida Empresa Rancho Santa Margarita, CA 92688-2112 800-635-4772

Office Hours: Mon - Fri 8 AM - 5 PM PST Tech Support: Mon - Fri 6 AM - 5 PM PST