

August 01, 2012

Getting Started with the Intelligent Mail® Barcode

Applies to: SmartMailer™

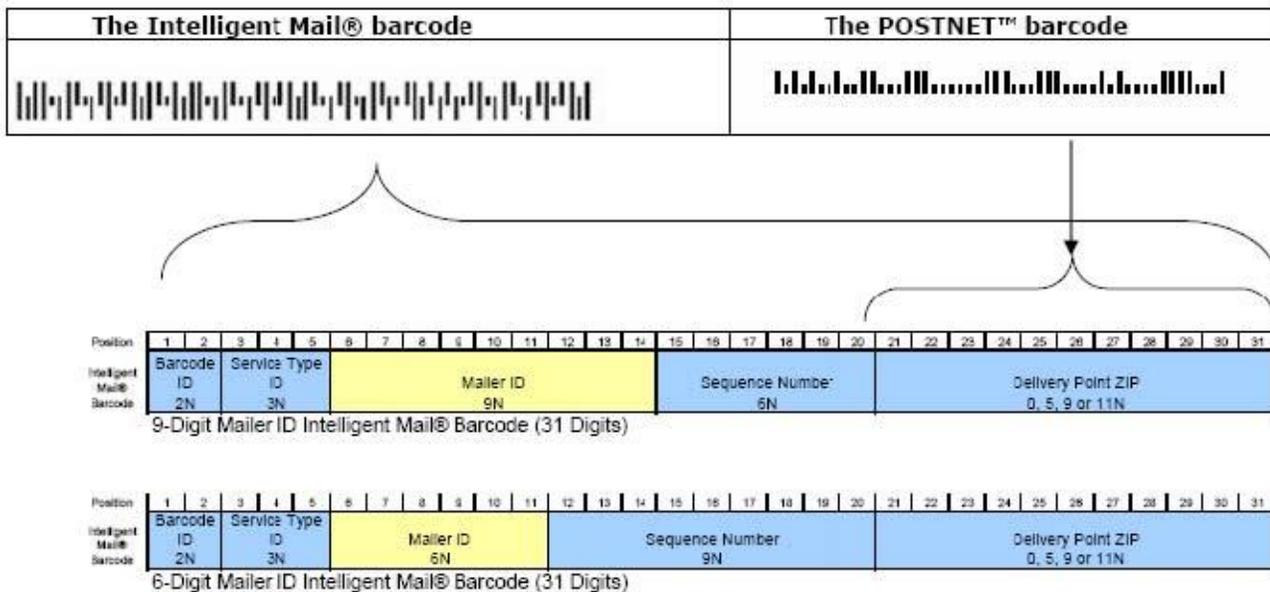
Purpose

This document provides instructions on how to start using the Intelligent Mail® barcode (IMb) in your SmartMailer™ 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 SmartMailer™.



SmartMailer™ • 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 SmartMailer™:

1. Obtain a Mailer ID from the USPS®.
2. Enter your new Mailer ID in SmartMailer™.
3. Create your Intelligent Mail® barcode mailing (including the TrackMyMail option) in SmartMailer™.
4. Add the Intelligent Mail® barcode to your mail piece layout using Envelope Designer™ Plus.
5. Print your mail list, selecting the mail piece layout you created and saved in step 4.
- OR -
Export the mail list from SmartMailer™, selecting the **Export Intelligent Mail® Barcode data** checkbox in the Export Wizard.
6. If you selected the **Full Service using Postal Wizard or Mail.XML** option (in Procedure 3) or if your post office requires electronic documentation, you must use the USPS® Business Customer Gateway Postal Wizard® or submit via 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:

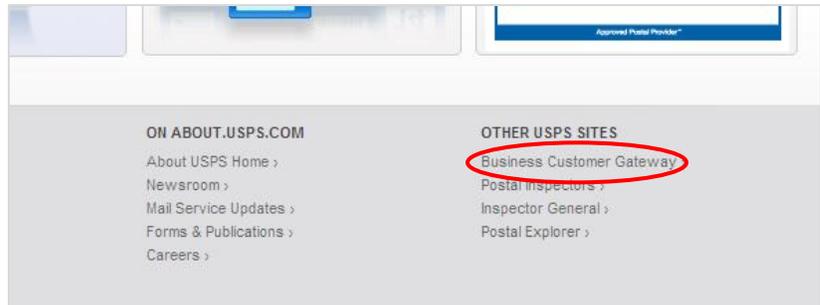
- Accessing the Business Customer Gateway
- Registering as a New User
- Noting the Customer Registration ID (CRID)
- Requesting a Business Service
- Assigning a Business Service Administrator (BSA)
- Obtaining a Mailer ID

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!

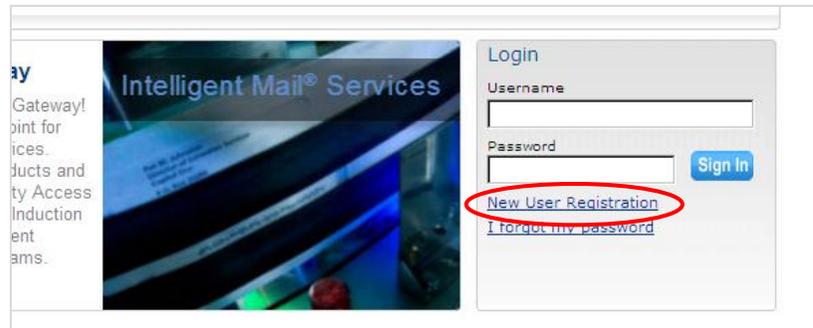
Accessing the Business Customer Gateway

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.



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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 Field]
[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 Field]
Password Strength: [Progress Bar] 0% Too Short
[Text Input Field]
Re-Type Password: [Text Input Field]

***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] [Dropdown]
Your Answer: [Text Input Field]
Answers are not case-sensitive. ?
Re-Type Your Answer: [Text Input Field]
[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] [Dropdown]
*First Name: [Text Input Field] M.I.: [Text Input Field] *Last Name: [Text Input Field]
Suffix: [Select] [Dropdown]

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

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

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

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.

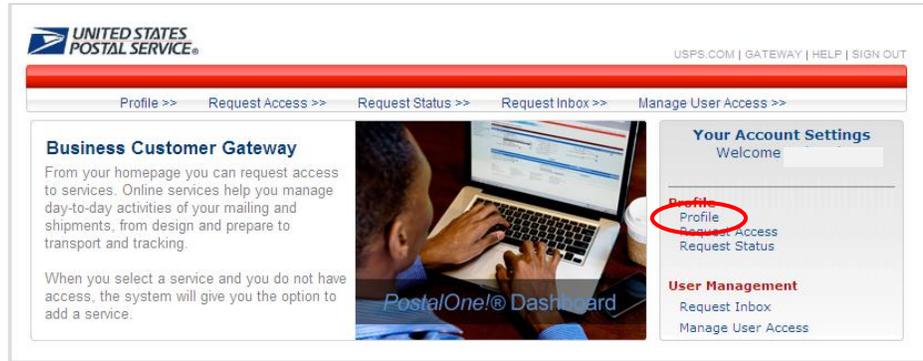
UNITED STATES POSTAL SERVICE®

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

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

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- 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 checked="" 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 >**

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3. 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.
4. Enter a number into the Number of MIDs Requested.
5. 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"/>

6. For a mailer using FULL or BASIC and no other services, check option Full / Basic Service.
7. 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

8. The new Mailer ID is displayed.
9. 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 SmartMailer™

To enter your new Mailer ID in SmartMailer™:

- 1) Launch SmartMailer™ in Classic Mode.
- 2) In SmartMailer, select menu item **Edit > Preferences** or press Ctrl-R.
- 3) In Preferences, click tab **Intelligent Mail® Barcode**.
- 4) Click button **Mailer Names and IDs**.
- 5) In Mailers, click button **Create**.
- 6) Enter the mailer name in the Mailer Name field.
- 7) Enter the Mailer ID in the Mailer ID field.
- 8) Click **OK**, then click **OK** again to exit the Mailers dialog.
- 9) Click **OK** to exit Preferences.

Procedure 3: Create Your Intelligent Mail® barcode Mailing

To create an Intelligent Mail® Barcode mailing in SmartMailer™:

- 1) Launch SmartMailer™ in Classic Mode.
- 2) In SmartMailer, select menu item **Process Mail > Presort > Setup Wizard**.
- 3) Click **Mail Piece Setup** from the left menu.
- 4) In the Barcode section, select option **Intelligent Mail® barcode**.
- 5) Click **Mailing Options** from the left menu.
- 6) In the Sortation Methods/Rates section, under the Automation checkbox, select one of the options.

NOTE: The **Basic Option** is a discounted mailing that has an Intelligent Mail® barcode instead of a POSTNET™ barcode. A **Full Service using Postal Wizard or Mail.XML** mailing 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 Postal Wizard via the Business Customer Gateway (for < 10,000 piece mailings) or Mail.XML.

Full Service requirements, such as unique sequence numbers, Intelligent Mail® container labels, and so on are handled by SmartMailer™ automatically.

- 7) Click **Origin/Entry Options** from the left menu.
- 8) You must now assign your new Mailer ID to a new or existing Permit Holder.
 - a. Select your target permit from the Permit Holder drop-down and click **Edit**.
 - OR –
 - Click **New** to create a new Permit Holder.
 - b. In Permit Holder Information, click **Select** located next to the Mailer ID field.
 - c. In Mailers, select the target mailer from the Mailer Name drop-down and click **OK**.
 - d. Update any information as required in the Permit Holder Information, then click **Save**.
- 9) Click **Mailer ID Selection** from the left menu.
- 10) Select the mail owner from the Mailer Owner drop-down.
- 11) Continue setting up your mailing in the Presort Setup Wizard.

IMPORTANT: If you plan to create a tracking job after the sort is completed, a TrackMyMail Mailer ID will be applied to your mail pieces – not the new Mailer ID you obtained in Procedure 1. This happens automatically when you create a tracking job. Note, however, that **your** Mailer ID will be applied to the container labels. For more information about setting up and including the TrackMyMail option, refer to the SmartMailer™ Help.

Procedure 4: Add an Intelligent Mail® Barcode to your Mail Piece Layout in Envelope Designer™ Plus

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

- 1) Launch Envelope Designer™ Plus (ED+).
- 2) Select menu item **Edit > Barcode**.
- 3) Select Barcode Type option **Intelligent Mail® Barcode**.
- 4) Select the desired location from the Barcode Position drop-down.

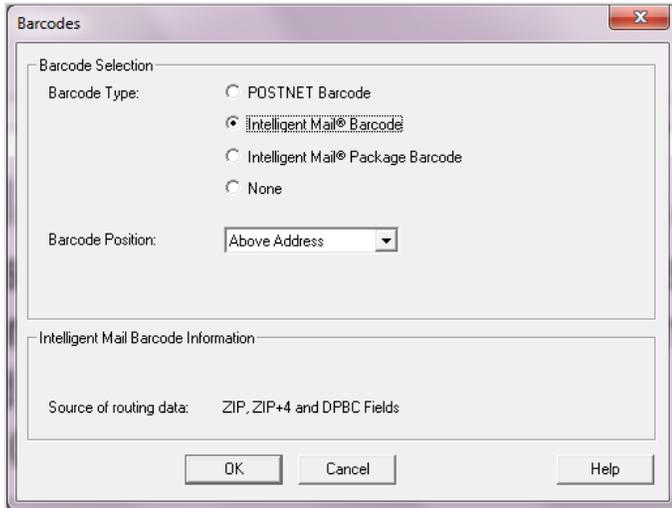


Figure 1 – ED+ via SmartMailer

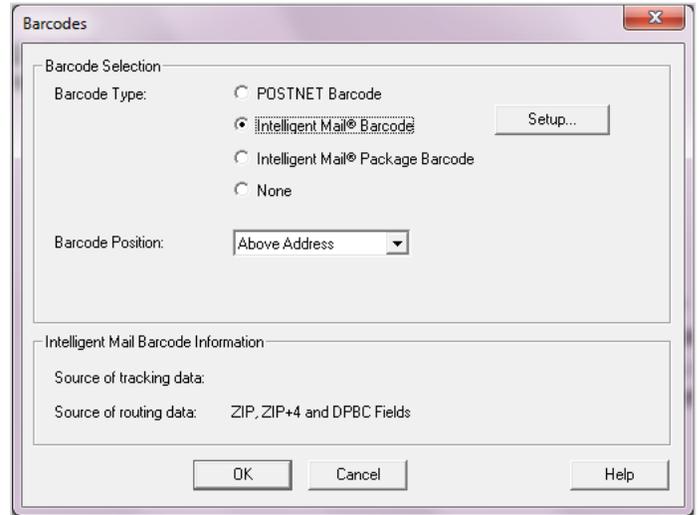


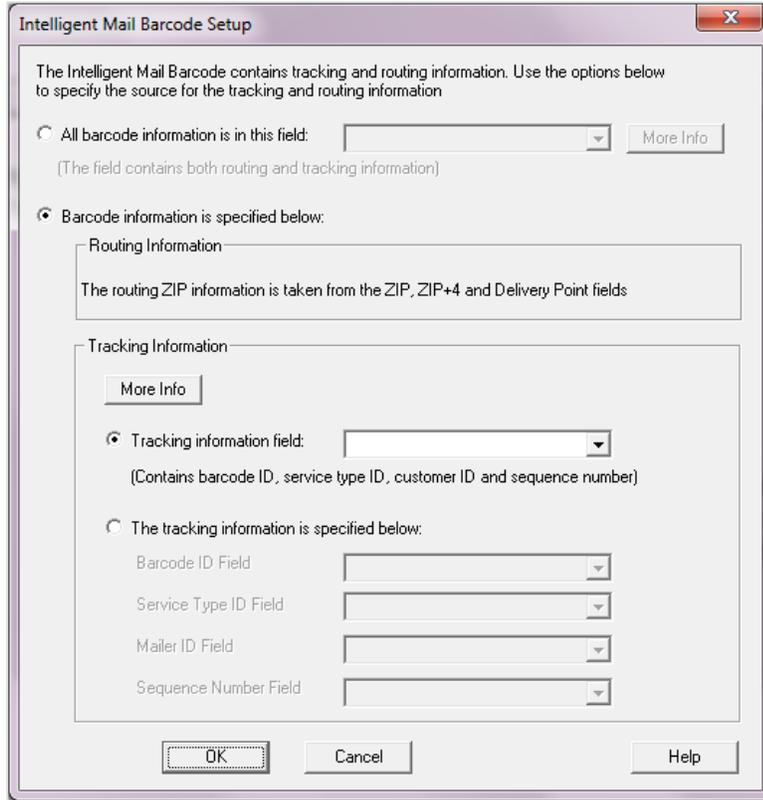
Figure 2 – ED+ (standalone) with list attached

- 5) If you are using Envelope Designer™ Plus in standalone mode (that is, if you are launching it outside of SmartMailer™), it will accept the input for Intelligent Mail® barcode contents in one of several formats.
 - a. Click **Setup** to display the Intelligent Mail Barcode Setup dialog (see below).

NOTE: If the **Setup** button is not active, select menu item **File > Attach to Mail List** to choose a mail list that contains Intelligent Mail® barcode data.

- b. Select one of the setup options:
 - All the barcode information is in this field:**
 - OR –
 - Barcode information is specified below:**
 - Tracking information field:
 - OR –
 - The tracking information is specified below:
- c. Further configure the selection option as required. For more details and help with any of these options, click its **More Info** button.
- d. Click **OK** to save and exit to the Barcodes dialog.

- 6) Click **OK** to save and exit to the main (layout) window.
- 7) Remember to save the layout (**File > Save** or **File > Save As**) before exiting the application.

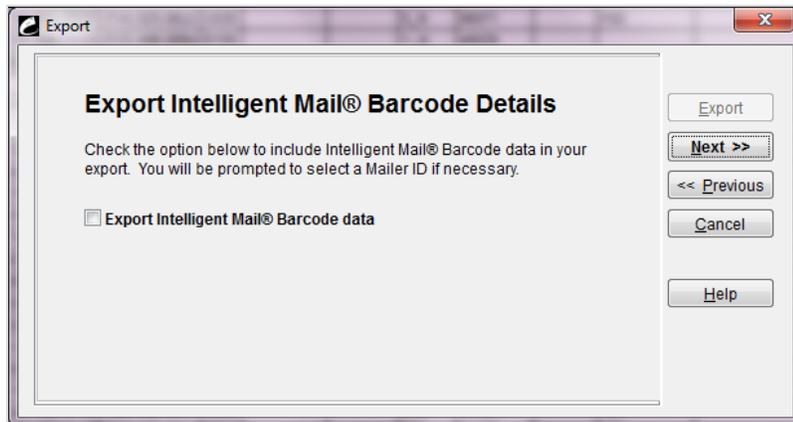


Procedure 5: Print Mail Pieces or Export SmartMailer™ Mail List Intelligent Mail® barcode Mailing

Print the mail pieces for your list, making sure you select the Intelligent Mail® barcode layout you created and saved in Envelope Designer™ Plus. (See Procedure 4 in this document).

– OR –

If you prefer to export addresses from the mail list to a different file type for use in another application, export the mail list from SmartMailer™. Make sure you check option **Export Intelligent Mail® Barcode data** in the Export Wizard.



Procedure 6: Submitting Postal Documentation Electronically

You will need to submit postal documentation electronically if you selected the presort Automation option of **Full Service using Postal Wizard or Mail.XML** or if your local post office requires it. You can do this by launching the Presort Reports dialog from SmartMailer™ (**File > Print > Reports > Presort Reports**).

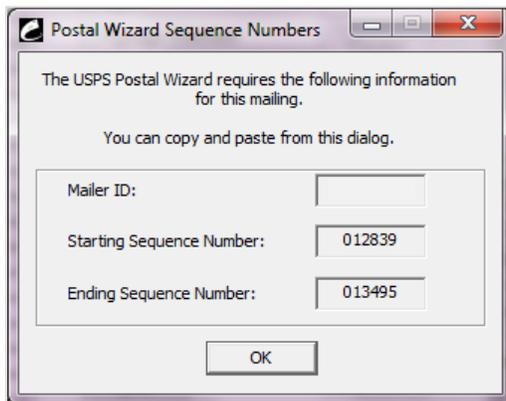
NOTE: Electronic submission of postal documentation for automation discounts is **not** required until January 2014.

SmartMailer™ supports two methods for submitting postal documentation electronically; Postal Wizard® and Mail.XML®.

Postal Wizard®:

For mailings of fewer than 10,000 pieces, you can submit electronically using the [Postal Wizard®](#).

Click [Postal Wizard](#) from the Presort Reports dialog to launch your browser to the USPS® Business Customer Gateway and display the Postal Wizard Sequence Numbers dialog. This dialog has information you will need when you use the USPS® Customer Gateway Postal Wizard®. You can copy and paste from this dialog.

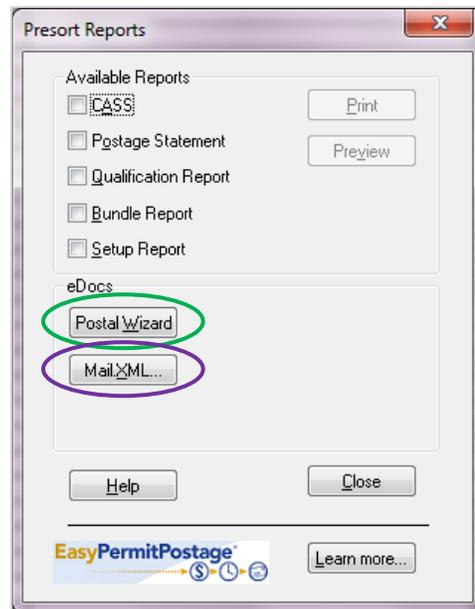


The USPS Postal Wizard requires the following information for this mailing.

You can copy and paste from this dialog.

Mailer ID:	<input type="text"/>
Starting Sequence Number:	012839
Ending Sequence Number:	013495

OK



Presort Reports

Available Reports

- CASS Print
- Postage Statement Preview
- Qualification Report
- Bundle Report
- Setup Report

eDocs

-
-

Help Close

EasyPermitPostage Learn more...

Mail.XML®:

The [Mail.XML®](#) feature is available only for discounted mailings. It allows you to connect to the PostalOne! web site and transmit information about your presorted mailing to the USPS®. Once processed by the USPS®, the acceptance procedure (when you bring your mailing to the post office) will be simpler and quicker.

Before using this new feature, you will 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 SmartMailer™* located on the SmartMailer™ DVD for more details.

Click [Mail.XML](#) from the Presort Reports dialog to display the Submit Mail.XML to PostalOne! dialog.

- Verify that it says *PostalOne! Production* at the top of the dialog. If not, go to the Mail.XML tab in Preferences and select option **Production**.
- Enter a meaningful job name. It will appear on the dashboard in PostalOne! after you submit.
- Enter your username and password (both are case sensitive).
- Click **Submit to PostalOne!**

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- After a few minutes, you will see a *Submission Successful* message. Click **Close** to return to the Presort Reports dialog.

