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

3. Enter contact and company information.

4. Read the Privacy Policy and click 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.
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.

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

Access should be granted.
- Click 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.
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.

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

7. Click Request Mid.

8. The new Mailer ID is displayed.

9. Click Return to Summary.

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.

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.

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