



# Pitney Bowes

## Full Service Intelligent Mail®

### FAQs

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## INTELLIGENT MAIL® BARCODE



### Q. What is the IMb™?

A: Intelligent Mail is a technology that will be used by the USPS® to support future generations of postal products, services, and associated features. Intelligent Mail is a technology platform made possible by the suite of Intelligent Mail barcodes. The USPS is requiring the IMb to obtain automation discounts, with rates varying by the type of mail that is sent. The IMb is replacing the POSTNET™, ACS™ and PLANET™ barcodes.

Beginning in January 2014, pieces in automation rate presorted mailings will require a Full Service IM barcode on all pieces in the mailing in order to achieve automation discounts. The IMb replaces the POSTNET barcode that mailers have been using for years, and the IMB requirements, (more specifically the Full Service IMB), are more extensive because it contains more “data.”

Up to now, both POSTNET and IM barcoding and related requirements to qualify for Automation rates have generally been accomplished through the use of mailing/presorting software or mail service providers. Meters can still be used to print the postage on such mailings, and this will continue.

The advantages of the IMb is that it provides significantly more information about a mail piece, beyond just the delivery point ZIP code, which makes it ideal for sorting and piece level tracking of First Class® and Standard Mail®. For example, the Full Service IMb allows for each individual piece of mail to be “unique” so that it can be followed, or “tracked” through the mail.

Intelligent Mail barcodes have been developed for mailpieces, trays, sacks and containers and help to identify the mailer, as well as uniquely identifying each mailpiece, tray or sack and container in a mailing.

### Q. Do I need to worry about implementing Full Service (FS) Intelligent Mail?

A: If you currently prepare or submit presorted mailings, you need to understand Full Service.

Mailers who currently prepare and submit presorted mailings that qualify for automation presort discount rates, who wish to continue to receive those rates, will need to implement the Full Service requirements for their mailings by January 26<sup>th</sup>, 2014.

Mailers who do non-automation presort rate mailings, while not required to become Full Service compliant, should consider the benefits and potential postage savings associated with going to Full Service.

*Mailers who do not do presorted mailings are not affected by the new Full Service requirements.*

#### **Q.What is meant by “automation” letters and flats?**

**A:** Automation letter or flat mail is mail that is 100% [barcoded](#) using an Intelligent Mail barcode (IMb) and prepared for the Postal Service’s high-speed mail processing equipment. The Postal Service saves the cost of more labor-intensive sortation and shares the savings with you in the form of lower postage prices. In addition, Automation compatible letters and flats meet certain shape, size, address and flexibility standards established by the USPS.

Automation prices are available for [letters, postcards, flats \(large envelopes\)](#), and [parcels](#). Your [business mail entry unit](#) can provide additional information and can help you decide if automation is right for you. A [mailpiece design analyst](#) can help you design a mailpiece that will qualify for automation prices. A presort bureau or letter shop can help you prepare your mail to qualify for these special prices.

TIP: Automation mailings have separate minimum quantity requirements; you cannot combine Presorted pieces and automation pieces to reach the minimum volume requirement.

#### **Q. What’s the difference between Automation Presort and Non-automation Presort rates?**

A. The postal service has posted rate tables that define what you pay for automation or non-automation presorted mail pieces. Below are two such tables for First Class and Standard Mail Letters to illustrate the difference in the rates you would pay. For example, using Full Service achieves an additional per piece discount of \$0.003 for First Class Mail and \$0.001 for Standard Mail.

<https://www.usps.com/prices/fcm-com-letters-and-pc.csv>

<https://www.usps.com/prices/std-mail-letters.csv>

#### **Q. What benefit do I get from doing Full Service now (in 2013)?**

- A. Each qualifying FCM mail piece receives an additional \$0.003 discount.
- B. Each qualifying STD mail piece receives an additional \$0.001 discount.
- C. Free automated address correction (ACS) information.
- D. Free Start-the-Clock notification when your mailing enters the mailstream.

**Q.I don’t prepare or submit presorted mailings, but I do use a Pitney Bowes meter to print postage on various letters and mail pieces occasionally or throughout the day, what do I need to do?**

- A. You can continue to use your meter the way you have been up to now, no additional feature or software is needed. Full Service affects mailers that perform presorted mailings, usually using mail presorting software.

**Q. What mail can get discounts from using the IMb?**

A. The following is eligible for discounts (as of 2013)

- First-Class Mail® letters and flats
- Standard Mail® letters and flats
- Periodicals letters and flats
- Bound Printed Matter flats
- Qualified Business Reply Mail (QBRM) and Permit Reply Mail

**Q. How many pieces do we need to send out on a daily or annual basis in order for the IMb requirements to affect us?**

A. The required volume of mail depends on the class of mail:

- Commercial First-Class Mail® Letters and Flats- minimum of 500 pieces
- Standard Mail® Letters and Flats- Minimum of 200 pieces, or 50 pounds
- Periodicals Letters and Flats- Refer to the USPS for specific rules and volume requirements
- Bound Printed Matter- for automation rates, each piece must have an IMb
- Qualified Business Reply Mail – each piece must have an IMb
- Permit Reply Mail - each piece must have an IMb

Also note: to be eligible for *Commercial* First-Class and Standard Mail automation discounts, each mailpiece must bear an Intelligent Mail barcode and meet all mailpiece design standards.

Pitney Bowes meters are all “compliant” – that is, nothing has to be done to the meter with regard to the IMb. Pitney Bowes has several software solutions that print barcodes and are Full Service compliant, which include SmartMailer™ and AddressRight® Pro. We also have Pre-Sort services that are Full Service compliant.

**Q. What do I need to do to become a Full Service (FS) IM mailer?**

A: Please go to <https://ribbs.usps.gov/index.cfm?page=intelligentmail> and review “steps to getting started”. The USPS details (on this site) these steps:

- [Access the Business Customer Gateway \(BCG\)](#) to set up your account and mailing profile
- Get a [Mailer ID \(MID\)](#) and [Customer Registration \(CRID\)](#) for your Intelligent Mail Barcode
- Talk to software providers to determine if your software can send electronic documentation to the USPS via eDocs (electronic documentation). (Pitney Bowes is a Certified Software Vendor

through both SmartMailer and AddressRightPro – as both support eDocs. Please note that AddressRightPro requires the additional eDoc add on – it is NOT included in the standard software).

- Test that Full-Service submission (eDocs) works through the [Test Environment for Mailers \(TEM\) process](#)
- For help designing mailpieces, Contact the [Mailpiece Design Analyst Support Center](#)
- Learn about the feedback available for your Full-Service mailings, such as the Mailer Scorecard.

You should confirm that your mailing software includes the ability to produce IM barcodes, along with functionality that will enable you to prepare and submit Full Service compliant mailings that qualify for Automation Presort rates. These features include the ability to transfer information from postage statements and mailing documentation electronically to the Postal Service (eDocs), information that is normally submitted using hardcopy paper statements when the mailing is entered at the post office. SmartMailer and AddressRight Pro (Pitney Bowes presort software) already have these capabilities, although AddressRightPro must have the “option” for eDoc added. Other than this, no upgrade is needed for SmartMailer.

With regard to the eDocumentation (eDocs), please note that there are three forms that can be used to satisfy the Full Service requirement: Mail.xml, mail.dat, and Postal Wizard. Postal Wizard can be used for mailings with fewer than 10,000 pieces. For larger mailings, Mail.xml or Mail.dat are required. Mail.xml is included in SmartMailer and the optional eDoc add on for AddressRightPro supports BOTH Mail.dat and Mail.xml.

For the larger mailings (over 10,000 pieces), you will need to submit a test mailing to the postal service. This demonstrates that you have the software and understand how to use it submit a Full Service qualifying mailing. Use your Full Service capable mailing software to prepare a test mailing. The test mailing is submitted electronically using the USPS Test Environment for Mailers (or TEM), accessible using the Business Customer Gateway (BCG). You then send an email to the USPS to let them know that you have submitted a test mailing for their evaluation and approval. After some time, you will be notified with the results of that evaluation after which you will be approved to submit FS IMB mailings. Again, this testing is NOT necessary if you are doing smaller mailings (under 10,000 pieces) and using Postal Wizard.

SmartMailer and AddressRight Pro have both achieved certification from the USPS – and certified software allows you to do a “simplified” TEM testing process, which leads to a faster turnaround of test results. There are step-by-step guides on the Pitney Bowes website to help with the Full Service process. For help with printing the IMb on the mail piece, use these links:

For Smartmailer: <http://www.pb.com/docs/US/pdf/Products-Services/Software/Mailing-and-Postal-Compliance/cass-certification/smartmailer7/getting-started-with-imb-2012.pdf>

For AddressRightPro: <http://www.pb.com/docs/US/pdf/Products-Services/Software/address-management-and-deliverability/addressrightpro/getting-started-with-imb-2012.pdf>

For links to guides for Full Service with both SmartMailer and AddressRight Pro, go to the bottom of this page: <http://support.pb.com/ekip/index?page=content&id=RE13512>

In addition, information regarding the TEM process and can be found here:  
<https://ribbs.usps.gov/index.cfm?page=electronicdoc>

**Q. What is the different between the IMb Basic and Full Service options?**

	Basic	Full Service
IMB	X	X
Mailer ID	X	X
11 Digit Routing Code	X	X
Unique Sequence Numbers for 45 Days		X
IMB Tray/Sack/Container Labels and Pallet Placards w/ unique sequence numbers		X
eDocs		X
FAST Scheduling*		X

\*Required for drop-ship mailings and all mailer-transported, origin-entered mail verified at a detached mail unit (DMU).

**A. Please note:** The Basic Service option is only available this year (2013). As of January 26, 2014, the only option (to be eligible for automation discounts) will be Full Service.

Full Service IMb pricing (i.e. postal rates) is lower than Basic IMb because the mailer does “more work” for the USPS, prior to mail induction.

Full Service IMb mailers must also put barcodes on trays, pallets, and containers, as well as submit required documentation and other information to the USPS electronically. There are a few other requirements, also – for full requirements, please go to <http://www.pb.com/Postal-Information/Intelligent-Mail-Barcode/full-service-vs-basic/index.shtml> .

**Q. Is Full Service IMb a requirement for all businesses as of January 2014?**

**A.** The requirement is not placed on an organization – but rather on classes of mail (i.e. First Class and Standard Mail letters and flats, etc.) *that currently claim automation price discounts.*

**Q. Is IMb relevant to presorted mail?**

**A.** Yes, if this mail receives automation level price discounts.

**Q. Full service Intelligent Mail compliance is required as of January 26<sup>th</sup>, 2014. But is paying for and utilizing the Full Service required as well?**

**A:** The USPS® does not require IMb™ Full Service compliance until January 26<sup>th</sup>, 2014. As of that date the answer is yes, the USPS will require Full Service compliance for all mail pieces claiming automation discounts.

**Q. I receive a lot of Undeliverable As Addressed (UAA) mail. Can the IMb help with UAA?**

**A:** The request for move update information can be built into the IMb. When the USPS scans a mailpiece with a change of address, the mailer is notified automatically. This move update function is referred to as 'Single Source Address Change Service' (ACS). The service is optional with Basic IMb (during 2013) and carries a small charge for each updated address provided by the USPS. With the Full service option, ACS is offered at no charge. For detailed information go to [http://www.pb.com/Postal-Information/pdfs/wp\\_intelligentmail\\_92952\\_amer\\_1112.pdf](http://www.pb.com/Postal-Information/pdfs/wp_intelligentmail_92952_amer_1112.pdf) (See page 5 for UAA)

**Q. Does Full Service IMb require additional charges for each mailing?**

**A:** No, you actually will actually receive greater price discounts: an additional per piece discount of \$0.003 for First Class Mail and \$0.001 for Standard Mail. Full Service implementation may require a larger initial investment to implement (changing processing, etc.) over Basic Service, however.

**Q. How do you print the barcode on labels for flat sized envelopes?**

**A:** Flats can only have one barcode on the piece, since the entire surface is considered one read area. Barcodes on flat-size mailpieces can be placed anywhere on the address side as long as it is at least 1/8" from any edge of the piece.

**Q. What is the cost to implement Full Service IMb? What are the benefits?**

**A:** This will vary by customer and whether you are already an IMb Basic customer. Perhaps more important than the cost are the benefits. Beyond the additional price discounts and free Single Source Address Change Service' (ACS), Full Service offers much more that often goes unrecognized.

Typically overlooked are the much larger cost savings achievable when an organization takes advantage of the full functionality of IMb for complete mail piece tracking, and all the enterprise-level opportunities that creates. It is these overlooked opportunities for cost savings that are driving many of the organizations implementing Full Service Intelligent Mail today.

**Q. At what volume does IMb Full Service make sense? We mail about 1.2 million pieces a year as barcoded First Class Mail.**

**A:** Full Service makes sense at any volume that qualifies for normal presort discounts. In your situation, assuming the pieces qualify for automation rates, you would save an additional \$3,600 in postage costs. Full Service helps you to attain the maximum discounted postal rates available. In addition, it can help

with Undeliverable As Addressed (UAA) mail, and it can help you to understand where your mail is once it's deposited at the USPS.

With Full Service tracing, you can also have visibility into incoming payments. This can also be helpful when planning the expected delivery date of incoming mail (for remittance notices), allowing for better staffing, lockbox operation, and customer experience.

**Q. We are a small company. We send out a maximum of 50k pieces of mail. We only use the stamping technology from Pitney Bowes. How are we IMb compliant?**

**A:** Pitney Bowes has solutions that enable IMb compliance (for both Basic Service and Full Service). These include SmartMailer™ and AddressRight® Pro. If you are using either of these, you are probably already Basic Service compliant. In order to move to Full Service, you'll have to take some additional steps in your processing. Check with your local Pitney Bowes Sales Consultant to be certain.

**Q. Can I download the IMb online? Or do I need to contact Pitney Bowes to get this new barcode loaded into my Pitney Bowes software?**

**A:** Pitney Bowes software (such as Smartmailer™ or AddressRightPro®) provides you with the barcodes you need. There is nothing that needs to be done or changed for a Pitney Bowes postal meter.

**Q. [With IMb] can we expect returned mail to be returned timelier? Sometimes we receive return mail 4-8 months after we originally mailed it.**

**A:** With Full Service Intelligent Mail barcoding, mailers can receive automated Address Correction (ACS) at no charge. ACS is a post mailing service that allows mailers to receive change-of-address (COA) and other reasons for non-delivery electronically and reduce the number of manual (hardcopy) address notifications.

In addition, Pitney Bowes has a pre-mailing solution called VeriMove, which is an optional feature of either Pitney Bowes SmartMailer or AddressRight Pro address hygiene solutions. Validating mailing lists against VeriMove prior to mailing helps to ensure that mail piece addresses are accurate. This may mean performing VeriMove each month but, depending on your customer base, VeriMove may still identify a number of customer moves that you might not otherwise be aware of.

**Q. My office mails 25-35 pieces of First Class Mail daily. Do we need to worry about the IMb?**

**A:** No. Your mail volume levels do not meet the volume requirements for commercial mailings. Therefore, you would not be eligible for automation discounts and the IMb requirement does not apply to you at this time.

**Q. Will clients of Pitney Bowes' Presort Service automatically get the discounts, since the IMb will be applied?**

**A:** When using Pitney Bowes Presort Services, automation eligible mail pieces that bear an IMb will get the appropriate discount.

**Q. We send out all of our mail to a consolidator who barcodes the mail. Do we need to worry about the IMb?**

**A:** Mail consolidators generally will apply the correct barcodes to ensure price discount eligibility. You may want to check with your consolidator to be sure.

**Q. We send out water bills that are postcards. Will postcards need an IMb as well?**

**A:** If you are getting automation discounts on the postcards you are mailing, you will be required to print a Full Service IMb on the postcard to be compliant.

**Q. If a third-party mailer is sending the mail: Who's CRID is used? Who's MID? If the CRID is used to identify who is submitting the eDoc info, then I assume that the CRID is that of the third party mailer, and the MID is that of the mail owner. Is this correct?**

**A:** The eDoc will ask for the identity of the mail owner and the mail preparer. A CRID or MID can be provided. Future releases may also ask for the identity of the eDoc submitter.

**Q. I see that raw data [for tracing] is available at no charge, how is this delivered?**

**A:** The mailer would need to set up an account with the IMb Tracing program and receive the data via FTP, or pull it down from the IMb Tracing website. The file arrives with raw scan format and requires conversion to become usable data. Trackmymail from Pitney Bowes can handle all the scan data and provide almost real time updates with a full suite of reports.

**Q. From the Business Customer Gateway, I see you can get tray and container tracking. Can you get single-piece tracking also?**

**A:** No single piece data available on the Business Customer Gateway except for top of bundle. If you want single piece tracking, please consider using Trackmymail.

**Q. Is the Business Customer Gateway where you receive address updates from free full-service ACS? If not, where is this made available?**

**A:** To participate in Full Service ACS, a mailer needs to complete their profile in the Business Customer Gateway and complete an application with the ACS program to have the data delivered. There are quite a few ACS options available, driven by the STID in the IMb. There's a lot of data in the ACS file, and the only unique identifier is the IMb. Trackmymail can help by associating the address updates with meaningful data and delivering as scheduled data feeds.

**Q. TEM testing – how long does this take to complete?**

**A:** It totally depends upon the mailer, the USPS facility where the mail is dropped, and PostalOne! Every scenario is unique. The PostalOne! HelpDesk will be supporting 100% of the mailers submitting TEM

testing between now and January, 2014. Given the deadline and the number of mailers who are going through this process, it may be quite difficult to be stuck and need help. For that reason, mailers need to start pursuing TEM testing as quickly as possible in 2013.