# Postage $aver

USPS Pave-Gold Certified
Bulk Mail Sorting Software

## Quick Start Instructions for Using Postage $aver for Mac with Comma or Tab Separated Text Files (.csv, .tab or .txt)

**Note: Where these instructions refer to .csv files, you can use the same instructions for .tab or .txt files.**

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### Installing the Postage $aver Demo

1.) When you downloaded the Postage $aver demo from our web site, you saved the Postage $aver demo installer on your desktop. The installer is called "InstallPostage$averLion.dmg" or "InstallPostage$averSL.dmg".

2.) If the installer file doesn't open automatically, double-click it. The installer should then show you the standard Mac installer screen. Follow the instructions on that screen to install the software. The installer also contains several help files that you can read by double-clicking each of them.

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### Running a quick demonstration using the Postage $aver sample file

We suggest you run the sample file before using Postage $aver on your own file. You won't have to set anything up and you can see how Postage $aver works quickly and easily.

1.) After installing the Postage $aver demo, double-click the Postage $aver icon (the yellow stamp), which should be in your Applications menu. If you are asked for a registration code, click "Run As Demo" to continue your demo without entering any codes.

2.) In Postage $aver, go to the Sort menu and select the sort wizard. For a quick demo, just click "next" on each screen to use the sample information without making any changes, or you can fill in the actual information for your own mailings. There is a complete help page for each screen.

3.) After the information screens are complete, you will be asked to choose the file you want to sort. Navigate to your “Documents” folder and choose "Postage $aver Sample" (or "Postage $aver Sample.xls").

4.) The next screen will verify that Postage $aver can read the file, and will show you how many addresses the file contains. Click Finish to begin sorting the file.

5.) When the sorting is finished, you can choose the reports you want to print. After printing, Postage $aver will add sequence, tray, and group information to the sample file and re-save it in sorted order.

6.) You can open the "Postage $aver Sample" file in Excel to see the finished file. You can print the addresses using a mail merge in Word or another word processing program, and they will be in the correct order for bulk mailing, matching the reports printed by Postage $aver.

**Adding barcodes to the sample file:**

The Postage $aver demo installer includes the option to install a demo of Smart Barcoder, our postal barcoding software. When you purchase Postage $aver Pro, it includes a registered copy of Smart Barcoder at no extra charge.

If you installed the Smart Barcoder demo, you can add barcodes to the sample file.

1.) Run Postage $aver again, following steps 1 and 2 as above. This time, on the first screen of the sort wizard, change the choice on the third question from "Not Barcoded" to "Barcoded". Click next and continue through steps 2 through 5.

2.) Since you set Postage $aver to "Barcoded", it will give you an option to add barcodes once it has finished saving the sorted file. If you choose yes, Postage $aver will automatically run Smart Barcoder. Smart Barcoder will show you a setup screen, then ask you to pick a file, just like Postage $aver did. Choose the "Postage $aver Sample" (or "Postage $aver Sample.xls) again, click Finish on the next screen, and Smart Barcoder will add barcodes to the sample file.

3.) You can open the "Postage $aver Sample" file in Excel to see the finished file. You will see the barcodes in the "barcode" column, but they will be in character format, not barcode format. For example, the column will have something like:

TADTAFTDTFDDDAATADTTDTDTFDDAFDFDTFTAFDAFFDAAFDFFFTDDTTDADTDFTDAAT

Don't worry about this not looking like a barcode in the Excel worksheet. When you print these characters using the SmartBars12 barcode font, set at 12 point size, the letters will turn into the correct bars.

The easiest way to print the barcodes with your addresses is to do a mail merge using Microsoft Word or another similar word processor. When you set up the mail merge, choose “SmartBars12” as the font for the barcode field only, at a font size of 12 point, and the font will convert the 65 letters into 65 bars according to USPS requirements.

If you are not familiar with setting up a mail merge, or you need help doing this, please see our step-by-step video for setting up a mail merge at http://savepostage.com/mailmerge.html .

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## Using Postage $aver with Your Own Files

Running your own file is not much more difficult than running the sample file. Postage $aver will run most mailing list files without any modifications.

**Setting up your .csv file to use with Postage $aver:**

For Postage $aver to read and sort your .csv file, you just need to have each part of the address in a separate field. Postage $aver needs:

- A single field containing the entire zip code, **OR** a field with the first five digits and a different field with the next four digits. If you are not barcoding your mail, you only need the first five digits. For zip codes that start with zero, the zero must show in your file for Postage $aver to know that the zip code has the correct number of digits.

- A field with a city and a different field with the two-letter state abbreviation, **OR** a single field with both separated by a comma and space, as in "Houston, TX".

- If you have a Periodical Class permit and want to take advantage of In-County discounts, you need a field for the county (or, if you prefer, for a letter (like "Y") or word that indicates that the address is in-county.)

Postage $aver can sort your list and prepare reports using just the fields listed above. However, can also add some helpful information to your file, such as the tray each piece should be placed in, "Optional Endorsement Lines", or barcodes. If you just want to sort the file and/or print reports, close your .csv file if you have had it open, and skip down to "Running Postage $aver".

**Additional fields that Postage $aver will add to your .csv file:**

Postage $aver will add sequence numbers, tray/sack numbers, group/bundle numbers and USPS "optional endorsement lines" (OELs) to your list. You are not required to use any of these fields, but Postage $aver will add them for your convenience.

- a TRAY or SACK field containing the tray or sack number for each piece of mail in your file. This field will match the tray or sack numbers in the Mail Preparation Report and Price Qualification Report printed by Postage $aver.

- a BUNDLE or GROUP field containing the bundle or group number for each piece of mail in your file. A "bundle" is a stack of mail that is rubber-banded together before it is placed in a tray or sack. Bundles are used for larger or irregularly-shaped pieces of mail. Groups are stacks of mail that are kept together in a tray but not banded. This field will match the bundle or group listing in the Mail Preparation Report and Price Qualification Report printed by Postage $aver.

- an ENDORSEMENT field containing an "Optional Endorsement Line" (OEL) for each piece of mail in your file. OELs are only used in mailings that are "bundled", since they indicate the destination of the mail in the bundle. (A "grouped" mailing does not use OELs.) OELs look like "***** 3D 770". A mailer sending bundled mail can either put an OEL as the first line of each address, or can stick a specific colored sticker on the top piece of each bundle. Each OEL is also shown in the Mail Preparation Report, along with the colored sticker that can be used instead of printing the OEL.

Your file does not need to contain these additional fields before you run Postage $aver. If your .csv file does not contain these fields, Postage $aver will add them at the end of each line in the file. If you already have these fields in your file, and you want Postage $aver to use those fields rather than adding new fields at the end of each line, you can indicate the location of those fields when you get to the Field Identification Screen described below.

**Running Postage $aver:**

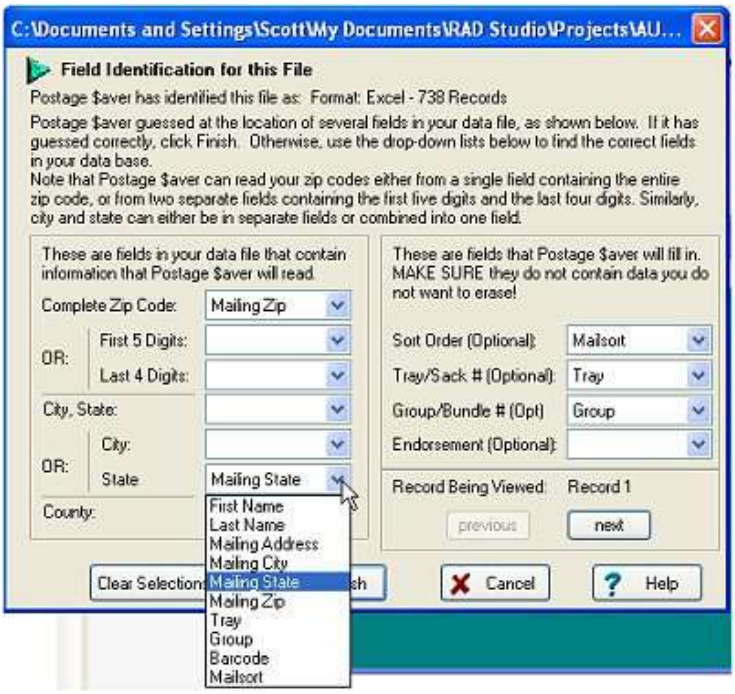
1.) After installing the Postage $aver demo, double-click the Postage $aver icon (the yellow stamp), which should be on your desktop or in the Programs/Postage $aver Software section in your start menu. If you are asked for a registration code, click "Run As Demo" to continue your demo without entering any codes.

2.) In Postage $aver, go to the Sort menu and select the sort wizard. For an actual mailing, you need to fill in the information that applies to your own mailings. There is a complete help page for each screen. You should **not** need to make any changes to the "Preferences" screen if you are using a .csv file.

3.) After the information screens are complete, you will be asked to choose the file you want to sort. Navigate to your .csv file and select it.

4.) The next screen will verify that Postage $aver can read the file, and will show you how many addresses the file contains. Postage $aver has tried to automatically figure out which fields in your .csv file are used for zip code, city, state, sort order, tray and bundle numbers, and OELs, and will show you those guesses on this screen.

(Please see screenshot on next page).




The white boxes show the columns in your .csv file that Postage $aver has guessed are the ones it should use. In this example, Postage $aver figured out that the complete zip codes are in the .csv field called "Mailing Zip", and that it needs to put the tray or sack numbers in the field called "Tray", etc.

If it has not matched up the correct fields, or if it has left a required field blank, click the arrow next to the white box for that field to see a list of all of the fields in your .csv file. Then choose the appropriate field to match the information that Postage $aver needs. In the screen above, the user is selecting the field called "Mailing State" as the field where Postage $aver will find the state for each address.

If you aren't sure what data is in each field in your file, you can click the "next" button to see the first address in your worksheet. The data will replace the field names in each drop-down list. You can move back and forth through your data by using the "next" and "previous" buttons.

Note that some .csv files do not have field names as their first record. The first record is actually the first address in files like that. In that case, you will see parts of the first address in the drop-down lists instead of seeing names of what the fields are.

Several fields on the screen are optional fields that you may or may not choose to use. If you have these fields in your .csv file, you should use the drop-down menus to indicate where Postage $aver should put this information. If you do not already have fields for this information in your .csv file, Postage $aver will add each field at the end of each line.

Once you have identified all of the fields you need, click "Finish" and Postage $aver will move on to sort the file.

5.) When the sorting is finished, you can choose the reports you want to print. After printing, Postage $aver will add any additional information you provided fields for, and re-save your .csv file in sorted order.

6.) You can open your .csv file in Excel or in a word processor to see the finished file. You can print the addresses using a mail merge in Word or another word processing program, and they will be in the correct order for bulk mailing, matching the reports printed by Postage $aver.

7.) If you selected "barcoded", you will see a box asking if you want to add barcodes to your mailing. If you choose yes, Postage $aver will run a separate program called Smart Barcoder, our postal barcoding software. Smart Barcoder works very much like Postage $aver. See the description for adding barcodes to the sample file (above) for details.

**Printing addresses from your .csv file:**

You can open your .csv file in Excel or in a word processor to see the finished file.

Your addresses should now be in the order required for your bulk mailing. The order should match the order specified in the mail preparation instructions and the order of the listings on the price qualification report. Any information you asked Postage $aver to add, like OELs, will be in the fields that you selected on the field identification screen when running Postage $aver.

If Postage $aver was unable to process some of your addresses, for example because of missing zip codes, those addresses have been sorted as the last addresses in the file. They have not been included in the postage calculations for the postage statement or on any of the reports. Such pieces should either be deleted from your mailing or mailed with regular stamps as first class mail. (Note that if you fix the errors and wish to include them in your mailing, you should rerun Postage $aver so that they will be properly sorted and included in the reports.)

You can now print labels, envelopes, letters, etc. from your .csv file using a mail merge with Microsoft Word, and the addresses will be in bulk mail order. If you are not familiar with setting up a mail merge, or you need help doing this, please see our step-by-step video for setting up a mail merge at http://savepostage.com/mailmerge.html .

**Including barcodes in your addresses:**

If you used Smart Barcoder to add barcodes to your .csv file, those will show up in the field you selected when you ran Smart Barcoder, but they will be in character format, not barcode format. For example, the field will have something like:

TADTAFTDTFDDDAATADTTDTDTFDDAFDFDTFTAFDAFFDAAFDFFFTDDTTDADTDFTDAAT

Don't worry about this not looking like a barcode in your .csv file. When you print these characters using the SmartBars12 barcode font, set at 12 point size, the letters will turn into the correct bars.

The easiest way to print the barcodes with your addresses is to do a mail merge using Microsoft Word or another similar word processor. When you set up the mail merge, choose “SmartBars12” as the font for the barcode field only, at a font size of 12 point, and the font will convert the 65 letters into 65 bars according to USPS requirements.

If you are not familiar with setting up a mail merge, or you need help doing this, please see our step-by-step video for setting up a mail merge at http://savepostage.com/mailmerge.html .

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**Need More Help?**

All of the above information, plus a helpful tutorial on bulk mail, is contained in the Postage $aver Help system. Find it in the Instructions/Help menu when Postage $aver is running.

If you cannot find what you need in the Help system, please e-mail us at http://savepostage.com/pshelp.html and we will respond promptly.

Thanks again for trying Postage $aver.