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

Installing the Postage $aver Demo

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

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 the complete Postage $aver User Guide.

Running a quick demonstration using the Postage $aver sample file

We suggest you run the sample file before using Postage $aver for 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 on your desktop or in your Applications folder. If you are asked for a registration code, click "Run As Pro Demo" (for a barcoded mailing) or "Run As Lite Demo" (for a nonbarcoded mailing) to continue your demo without entering a registration code.

2.) In Postage $aver, click on the blue mailbox to start preparing your mailing. 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 sorting information and barcodes (if applicable) 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. If you're not familiar with doing a mail merge, you can watch our quick tutorial video.

If you chose a barcoded mailing, you will see the groups of 65 letters in the "barcode" column. 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 SmartBars12 font was installed with your demo.

Using Postage $aver with Your Own Files

Setting up your mailing list file to use with Postage $aver:

For Postage $aver to read and sort your mailing list file, you just need to have each part of the address in a separate column. Postage $aver needs the following columns.

- A single column containing the entire zip code, OR a column with the first five digits and a different column with the next four digits. These should be TEXT format columns, not zip code format. If you are not barcoding your mail, you only need the first five digits;

- A column with a city and a different column with the two-letter state abbreviation, OR a single column with both separated by a comma and space, as in "Houston, TX". This column can be in general format; and,

- If you want to add barcodes to your mailing, you must have an additional column for a two-digit "delivery point code" (explained below). This should be a TEXT format column, not a number column. (Delivery point codes are not required for parcel mailings.)

Adding optional columns to your mailing list file:

If you are sorting your mailing list for a nonbarcoded mailing, you don't need to do anything to set up your mailing list file. Postage $aver will read it, sort it, and print the reports you need for the USPS.

However, at your option, Postage $aver can also add other information that you may wish to use in preparing your mailing, such as tray/sack number, USPS optional endorsement lines, and barcodes. For each item that you want Postage $aver to add, you can either include a column in your mailing list file, or, if you choose, Postage $aver will add a column to the end of each record.

To have Postage $aver add optional information to columns that you provide, open your mailing list file. Then add any or all of the following columns:

Suggested Column Name	Purpose	Data Type	Minimum Size	Req. or Opt.
MAILSORT	Sorting order	Number or Text	6	Optional
TRAY (or SACK)	Tray or sack number	Number or Text	5	Optional
BUNDLE (or group)	Bundle or group number	Number or Text	5	Optional
ENDORSEMENT	Optional Endorsement Line (OEL) for flats	Text	25	Required for flats *
BARCODE	Intelligent Mail Barcode	Text	65	Optional
SERIAL	Barcode Serial Number	Number or Text	6**	Optional

* Optional Endorsement Lines (OELs) are printed above the address for mail that is prepared in bundles (flat-sized mail and nonmachinable letters). OELs indicate the sorting level and destination of the bundle. USPS strongly recommends the use of OELs, but in some circumstances allows, instead, a special colored sticker to be placed on the top piece of each bundle.

** If you are a large-volume mailer that has a 6-digit mailer ID, then the minimum size of the serial number field is 9.

The column names shown are suggestions. You can use any name. Postage $aver will automatically identify the correct columns to use if you use the suggested names shown, but you will always be given the opportunity to match Postage $aver's fields to your column names even if Postage $aver guesses incorrectly.

Additional requirements for barcoded mailings:

Barcoding is not required for bulk mail. However, it can provide additional benefits, such as slightly lower postage prices, faster delivery, free tracing, and a waiver of your annual bulk mailing permit fee.

But to add barcodes to your mailing, your list must first be "CASS-certified", to assure USPS that you have accurate zip+4 codes, and to provide an additional required two-digit "delivery point" code.

Postage $aver does not provide CASS certification for your mailing list. Software to do CASS certification is usually too expensive for small volume mailers to purchase. Instead, most small volume mailers use a list processing service that will certify your list for you for a much smaller charge (typically $30 per list). For more information about what is required for barcoding, and for links to some list processing services, please read our barcode information page.

You do not need to have CASS certification for nonbarcoded mail. For smaller mailings, it is often less expensive to send them without barcoding and not have to pay for CASS certification.

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 your Applications folder. If you are asked for a registration code, click "Run As Pro Demo" (for a barcoded mailing) or "Run As Lite Demo" (for a nonbarcoded mailing) to continue your demo without entering a registration code.

2.) In Postage $aver, click on the blue mailbox to start preparing the mailing. 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.

3.) After the information screens are complete, you will be asked to choose the file you want to sort. Navigate to your mailing list 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.

This screen will also ask you to identify each column in your mailing list file that Postage $aver needs to get information from or save information to. For example, in the file shown below, Postage $aver needs to know that the city name is in the third column, the state name is in the fourth column, and the zip code is in the fifth column.

	A	B	C	D	E
1	Company	Street Address	City	State	Zip
2	A1 BLUE PRINT CO	BOX 66446	HOUSTON	TX	77266-1668
3	AARON'S FURNITURE RENTA	8131 N IH-35	AUSTIN	TX	78753-8707

Each item that Postage $aver needs has a section on this screen. For example, Postage $aver needs to know the zip code for each address, so there is a section where you can tell Postage $aver where to find the zip code in your mailing list file. (Note that the whole zip code can either be in a single column, as shown in the file above, or can be split into two columns):
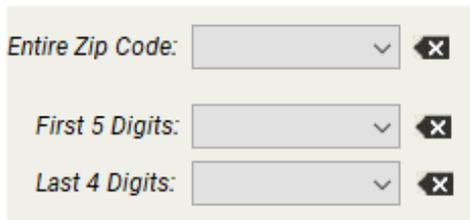
In each section, there is a drop-down list (shown by the down arrow) that shows all of the columns in your mailing list file, one address at a time. If your mailing list file has field names, the list will start by showing those. Otherwise, it will start with the first address in the file. (You can use the "Record now showing" buttons to step through the file to see other addresses.)

Here's the drop-down list showing the field names the Postage $aver automatically found in the mailing list file shown above:

Since this mailing list file has the entire zip code in one column (rather than splitting it into two columns), you would use the drop-down list next to "Complete Zip Code" (as shown), and select the "Zip" column:

After you make your selection, it will show in the box at the top of the list:

When this screen opens, Postage $aver will try to figure out which columns in your file match the information it needs, and will make selections for you automatically. If Postage $aver has guessed correctly, you can leave it alone. But if Postage $aver has left an item it needs blank, or has chosen incorrectly, you should make the correct selection for that item.

Some items are optional, such as Tray/Sack #s. You are not required to provide a field for those items if you aren't going to use that information and you don't need Postage $aver to supply it.

If you want Postage $aver to add optional information to your mailing list file, but you have not provided columns for this information, you can choose to have Postage $aver add columns to the end of each record in your mailing list file. To do so, check the box labeled "Add a new column to my data file for any item below that I leave blank", which is on the lower panel on this screen.

Once you have identified all of the columns you need, click "Finish" and Postage $aver will move on to sort the file, showing its progress as it goes through the sorting process.

5.) When the sorting is finished, you can choose the reports you want to print. The mail preparation instructions report provides detailed instructions for assembling your mailing. You'll need the tray/sack tags for properly labeling each tray or sack of mail, as specified in the mail preparation instructions. The postage statement and price qualification report are for the post office.

6.) After printing, Postage $aver will add any additional information you provided columns for, and add any columns if applicable, and save your mailing list file in sorted order.

Note that Postage $aver does not create a new file. It sorts and re-saves your mailing list in the same file that you started with, with any added information.

Printing addresses from your mailing list:

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 columns that you selected on the field identification screen when running Postage $aver.

If Postage $aver was unable to process some of your addresses (because of missing zip codes, for example), those addresses have been sorted to the end of 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 mailing list file using a mail merge with Microsoft Word, and the addresses will be in bulk mail order. If you're not familiar with doing a mail merge, you can watch our quick tutorial video.

Including barcodes in your addresses:

If you are doing a barcoded mailing, the barcodes will show up in the column you selected in your mailing list file, but they will be in letter format, not barcode format. The barcode column will have something like this:

TADTAFTDTFDDDAATADTTDTDTFDDAFDFDTFTAFDAFFDAAFDFFFTDDTTDADTDFTDAAT

When you set up your mail merge, choose "SmartBars12" as the font for the barcode field set at 12 point size (as explained in the video) and the font will convert the 65 letters into 65 bars according to USPS requirements. The SmartBars12 font was installed on your computer when you installed Postage $aver.

Need More Help?

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

If you cannot find what you need in the Help system, please send us your question at our help page and we will respond promptly. Thanks again for trying Postage $aver.