



## Quick Start Instructions for Using Postage Saver for Mac with Filemaker Pro files

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### Installing the Postage Saver Demo

- 1.) When you downloaded the Postage Saver demo from our web site, you saved the Postage Saver demo installer on your desktop. The installer is called "InstallPostageSaverLion.dmg" or "InstallPostageSaverSL.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 Saver sample file

We suggest you run the sample file before using Postage Saver on your own file. You won't have to set anything up and you can see how Postage Saver works quickly and easily. We have included a small text-format sample file for demonstration purposes. To run your own Filemaker Pro files, see the section below on running your own files.

- 1.) After installing the Postage Saver demo, double-click the Postage Saver icon (the yellow stamp) in your Applications folder. If you are asked for a registration code, click "Run As Demo" to continue your demo without entering any codes.
- 2.) In Postage Saver, 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 Saver Sample" (or "Postage Saver Sample.xls").
- 4.) The next screen will verify that Postage Saver 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 Saver will add sequence, tray, and group information to the sample file and re-save it in sorted order.
- 6.) You can open the "Postage Saver Sample" file in TextEdit 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 Saver.

### Adding barcodes to the sample file:

The Postage Saver demo installer includes the option to install a demo of Smart Barcoder, our postal barcoding software. When you purchase Postage Saver 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:

TADTAFTDTFDDDAATADTTDTDTFDDAFDFDTFTAFDFAFFDAAFDFFFDDTTDADTDFTDAAT

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, but there are a few additional fields you may want to add.

#### Setting up your Filemaker Pro file to use with Postage \$aver:

For Postage \$aver to read and sort your Filemaker Pro 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. These fields should be **TEXT field type**, not number field type. If you are not barcoding your mail, you only need the first five 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". This field should be text field type.

- A field that Postage \$aver will fill in to give you the tray or sack number for each piece of mail. This field should be number field type.

- A field that Postage \$aver will fill in to give you bundle or group number for each piece of mail. This field should be number field type.

- A field that Postage \$aver will fill in to give you zip code sequence number for each piece of mail. This field should be number field type.

- 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.) This field should be text field type.

You may also choose to add some helpful information to your file, such as the "Optional Endorsement Lines" or barcodes. If you just want to sort the file and/or print reports, skip down to "Exporting to Postage \$aver".

### **Adding optional fields to your Filemaker Pro file:**

Postage Saver can add USPS "optional endorsement lines" (OELs) to your list. This field is not required for Postage Saver to sort your file and print the USPS reports, but may be helpful to you in preparing your mail.

If you want to add optional endorsement lines, use Filemaker Pro to add the following field:

- Add an ENDORSEMENT field if you want Postage Saver to add an "Optional Endorsement Line" (OEL) for each piece of mail to your file. This field should be a text field type. OELs look like "\*\*\*\*\* 3D 770" and are only used for bundled mail (see BUNDLE above). 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.

If you want to use Smart Barcoder (our optional barcoding program) to add barcodes to your mail, add the following field:

- Add a BARCODE field. This field should be text field type. (To create barcodes for an actual mailing, you need a CASS-certified list, with nine-digit zip codes and a two-digit delivery point code. These are explained in the Instructions/Help menu in Postage Saver. Click the Table of Contents and choose the "Short Tutorial on USPS Bulk Mail for more information.)

### **Exporting to Postage Saver:**

- 1.) In your Filemaker Pro file, use the "Find" command to find the records you want to include in your mailing, or "Show All Records" to include all of the records. Don't sort the records in Filemaker Pro yet.
- 2.) Select "Export" from the "File" menu. Type a name and choose a location for the exported file, and choose "tab-separated" as your export file type. When the list of fields is displayed, move the fields containing your city, state, and complete zip code to the "field export order" box. No other fields need to be selected. The order of the fields does not matter. Leave the data formatting checkbox unchecked.

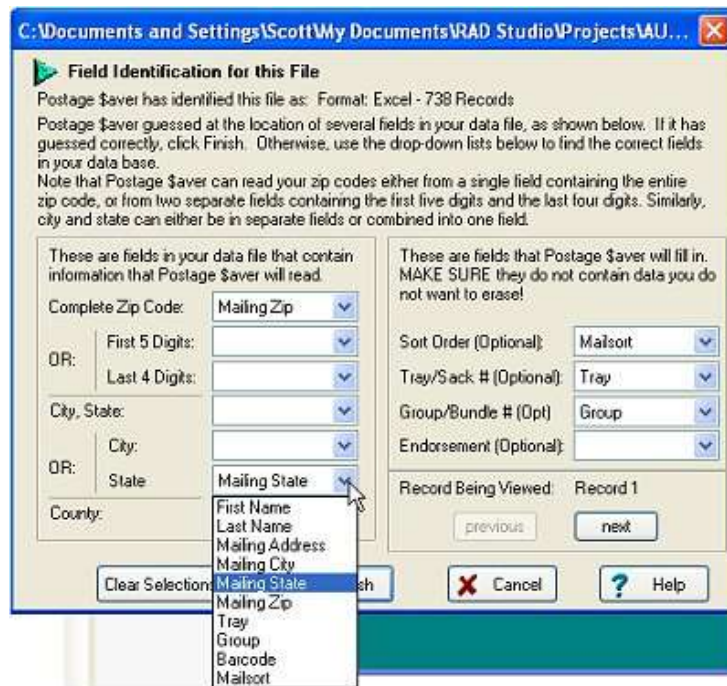
Note that, per the setup above, your city and state can be in two different fields, or in the same field separated by a comma and space. Your zip code can be in a single field, or you can have one field for the first five digits and another field for the last four digits. No matter how your fields are set up, make sure you export city, state, and the entire zip code.

Be sure to remember the name and location of the file that you have created by exporting.

Click "Export" to export the file.

### **Running Postage Saver:**

- 1.) After installing the Postage Saver demo, double-click the Postage Saver 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 Demo" to continue your demo without entering any codes.
- 2.) In Postage Saver, 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.
- 3.) When you get to the screen with the headline "Postage Saver Options" (the Preferences screen), go to the third question, "How should Postage Saver save the sorting information". Click the second choice, "Save sorting fields in a separate file".
- 4.) After the information screens are complete, you will be asked to choose the file you want to sort. Navigate to the export file you created in the previous step, and select it.
- 5.) The next screen will verify that Postage Saver can read the file, and will show you how many addresses the file contains. Postage Saver has tried to automatically figure out which fields in the export file are used for zip code, city and state, and will show you those guesses on this screen.



The white boxes show the fields in your export file that Postage Saver has guessed are the ones it should use. In this example, Postage Saver figured out that the complete zip codes are in the field called "Mailing Zip.

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 export file. Then choose the appropriate field to match the information that Postage Saver needs. In the screen above, the user is selecting the field called "Mailing State" as the field where Postage Saver will find the state for each address.

You can click the "next" button to move to the next record in your export file. 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.

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

6.) When the sorting is finished, you can choose the reports you want to print.

7.) After printing, Postage Saver will ask where you want to save the sorting information file. Type a name and choose a location for the file. This is not the same file that you exported from Filemaker Pro for Postage Saver to read. This is the file that Postage Saver will create to give information back to Filemaker Pro. Make sure you remember the name of the file and where you saved it.

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

### **Importing the Sorting Information back into Filemaker Pro, and Sorting Your File:**

1.) Now, return to your Filemaker Pro file. Without changing the group of found records you used when exporting your file, go to the "File" menu and choose "Import Records", then "File". Select the sorting information file that you just saved in Postage Saver (not the file you exported from Filemaker Pro earlier).

2.) Match the fields in the sorting information file (on the left) to the fields you created for that information in your Filemaker Pro file (on the right). The fields in the sorting information file are in the following order:

Tray Sequence  
Bundle Sequence  
Zip Sequence  
Optional Endorsement Line (The Optional Endorsement Line only appears if you are preparing bundled mail.)

**Important:** For "Import Action", choose "Update existing records in found set".

Once you have your fields lined up, click "Import" to import the sorting information file back into Filemaker Pro. This should fill in the fields that you created.

3.) Use the "Sort" command to sort your mailing list in tray/bundle/zip order to match the preparation instructions that Postage Saver printed. Sort your found records, in ascending order, by Tray Number, Bundle Number and Zip Number, in that priority. You can now print labels, envelopes, letters, etc. directly from your Filemaker Pro file and they will be in bulk mail order.

If Postage Saver 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 Saver so that they will be properly sorted and included in the reports.)

#### **Including barcodes in your addresses:**

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

TADTAFTDTFDDDAATADTTDTDTFDDAFDFDTFTAFDFAFFDAAFDFFFTDDDTTDADTDFTDAAT

Don't worry about this not looking like a barcode in your Filemaker Pro file. When you print these characters using the SmartBars12 barcode font, the letters will turn into the correct bars.

The SmartBars12 font was included in the installer for Postage Saver. Change the font for your barcode field to Smartbars12, using 12-point as the size. Make sure your field is wide enough to show the entire barcode.

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#### **Need More Help?**

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