



Quick Start Instructions for Using Postage Saver for Mac with Microsoft Excel files (.xls or .xlsx)

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.

- 1.) After installing the Postage Saver demo, double-click the Postage Saver 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 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 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 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:

TADTAFTDTFDDDAATADTTDTDTFDDAFDFDTFTAFFDAFFDAFDFFFTDDDTTDADTDFDTDAAT

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> .

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 columns you may want to add.

Setting up your Microsoft Excel file to use with Postage \$aver:

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

- 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.

- - 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 column can be in general format.

You may, however, choose to 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, make sure your Excel worksheet is closed in Excel, and skip down to "Running Postage \$aver".

If your Excel worksheet has more than 32,767 addresses, and the file uses the older .xls format instead of the newer .xlsx format, you must add a "mailsort" column to your Excel file, as described in the next section. Otherwise the column is optional.

Adding optional columns to your Microsoft Excel file:

Postage Saver can add sequence numbers, tray/sack numbers, group/bundle numbers and USPS "optional endorsement lines" (OELs) to your list. None of these columns are required for Postage Saver to sort your file and print the USPS reports, but they may be helpful to you in preparing your mail.

If you want to add any of this optional information, use Excel to add the following columns:

- Add a TRAY or SACK column if you want Postage Saver to add the tray or sack number for each piece of mail to your file. This column can be in general format. This information is also shown in the Mail Preparation Report printed by Postage Saver, so you don't absolutely have to add it to your file.

- Add a BUNDLE or GROUP column if you want Postage Saver to add the bundle or group number for each piece of mail to your file. This column can be in general format. 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 information is also shown in the Mail Preparation Report printed by Postage Saver, so you don't absolutely have to add it to your file.

- Add an ENDORSEMENT column if you want Postage Saver to add an "Optional Endorsement Line" (OEL) for each piece of mail to your file. This column can be in general format. 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.

- Add a MAILSORT column if you want Postage Saver to give you the exact sequence number for each piece of mail in the mailing. This column can be in general format. This column is required if you are using a .xls format (not a .xlsx format) file and you have more than 32,767 address. Otherwise it is optional.

- Add a BARCODE column if you want to use Smart Barcoder (our optional barcoding program) to add barcodes to your mail. This column can be in general format. (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.)

Running Postage Saver:

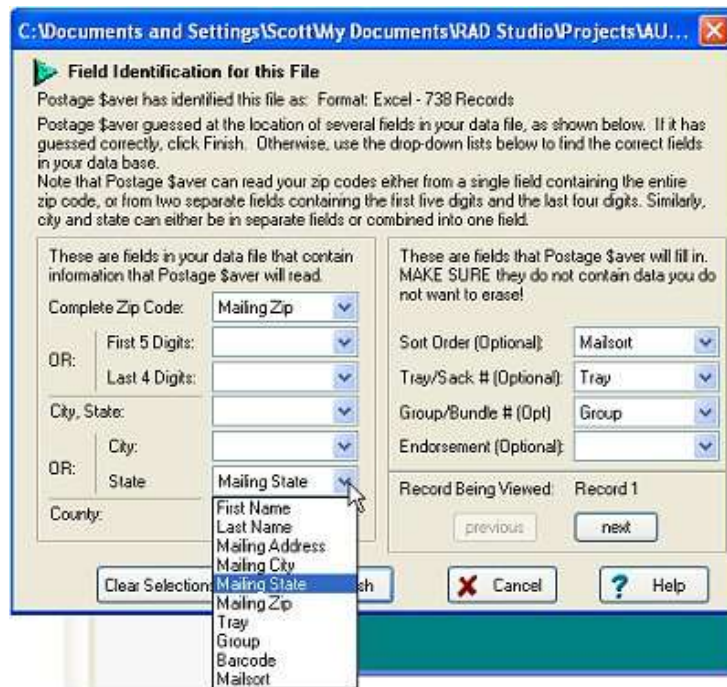
- 1.) After installing the Postage Saver demo, double-click the Postage Saver icon (the yellow stamp), which should be on your desktop or in the Programs/Postage Saver Software section in your start menu. If you are asked for a registration code, click "Run As Demo" to continue your demo without entering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

- 2.) In Postage 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. You should **not** need to make any changes to the "Preferences" screen if you are using an Excel file.

- 3.) After the information screens are complete, you will be asked to choose the file you want to sort. Navigate to your Excel file and select it. If your file has more than one worksheet, Postage Saver will ask you to select the correct one.

- 4.) 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 columns in your Excel worksheet 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 Excel worksheet 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 Excel column called "Mailing Zip", and that it needs to put the tray or sack numbers in the column called "Tray", etc.

If it has not matched up the correct columns, 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 columns in your Excel worksheet. Then choose the appropriate column to match the information that Postage \$aver needs. In the screen above, the user is selecting the Excel column called "Mailing State" as the Excel column where Postage \$aver will find the state for each address.

If you aren't sure what data is in each column in your Excel worksheet, you can click the "next" button to see the first address in your worksheet. The data will replace the column 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 columns 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 columns for, and re-save your Excel file in sorted order.

6.) You can open your 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.

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 Excel worksheet:

Using Excel, open your Excel file and select the worksheet you are working with.

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 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.)

You can now print labels, envelopes, letters, etc. from your Excel file using a mail merge with Microsoft Word, and the addresses will be in bulk mail order. If you are not familiar with using Word and Excel together to print addresses, you should use the mail merge wizard in Word. To get to the mail merge wizard in Word 2007, click the Mailings tab, choose Start Mail Merge, then choose Step-by-Step Mail Merge Wizard from the menu. To see help for mail merging, hold your cursor over the Start Mail Merge button and press your F1 key.

Word will guide you to set up a layout for your labels, envelopes, letters, etc. using the columns from your Excel file. When you do a mail merge, you set the layout up once, and then Word will create a copy of the layout for each address in your Excel file, automatically filling in the layout with the information in the corresponding columns in Excel.

Including barcodes in your addresses:

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

TADTAFTDTFDDDAATADTTDTDTFDDAFDFDTFTAFFDAFFDAAFDFFFTDDTTDADTDFTDAAAT

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> .

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.