



## Quick Start Instructions for Using Postage \$aver for Windows with Filemaker Pro file

### 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 the Programs/Postage \$aver Software section in your start menu. 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 (or your "My 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:

TADTAFTDTFDDAATADTTDTDTFDDAFDFDTFTAFAFFDAFFDAFFDFFFTDDTTDADTDFTDAAT

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 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 the following fields.

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

### Adding fields to your Filemaker Pro file:

To set up your Filemaker Pro file for Postage \$aver, you need to add several new fields. Each time you prepare a mailing using Postage \$aver, Postage \$aver will place a sorting information into these new fields. Then, by using Filemaker Pro to sort your mailing list according to these fields, the list will be sorted in exactly the order you need to prepare your bulk mailing. You can then print your envelopes or labels directly from your mailing list file and they will be printed in bulk mail order.

At your option, Postage \$aver can also add other information that you may wish to use in preparing your mailing, such as USPS optional endorsement lines and barcodes. You will need to have a field in your mailing list file for each item that you want Postage \$aver to add.

To have Postage \$aver add optional information, add any or all of the following fields:

Suggested Field Name	Purpose	Data Type	Minimum Size	Req. or Opt.
TRAY (or SACK)	Tray or sack number	Number or Text	5	Required
BUNDLE (or group)	Bundle or group number	Number or Text	5	Required
ZIP SEQUENCE	Zip order in bundles/groups	Number or Text	5	Required
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 the lines that look like \*\*\*\*\* 3D 587 that 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 field names shown are suggestions. You can use any name that Filemaker Pro will accept. 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 field 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.

### **Exporting to Postage \$aver:**

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. If you are doing a barcoded mailing, you will also need the field containing your delivery point code.

No other fields need to be selected. The order of the fields does not matter. Leave the data formatting checkbox unchecked.

Note that 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 \$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, 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.

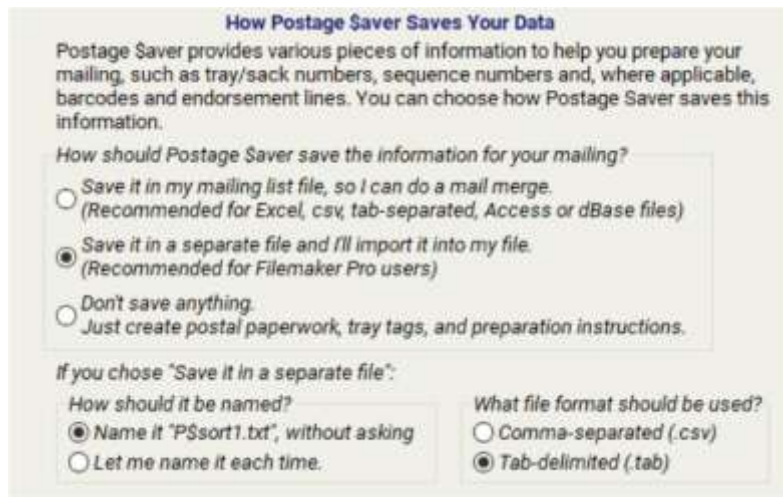
3.) When you get to the screen with the headline "Postage \$aver Preferences", go to the first section, "How Postage \$aver Saves Your Data."

For the first question, "How should Postage \$aver save the information for your mailing?", click the second choice, "Save it in a separate file and I'll import it into my file."

This will tell Postage \$aver to create a file that you will later import back into your Filemaker Pro file.

For the next question, you can let Postage \$aver name the file "P\$sort1.txt", or you can name it each time. In either case, you will need to remember what the file is named, so you can find it later.

For the file format, choose Tab-delimited.



**How Postage \$aver Saves Your Data**

Postage \$aver provides various pieces of information to help you prepare your mailing, such as tray/sack numbers, sequence numbers and, where applicable, barcodes and endorsement lines. You can choose how Postage Saver saves this information.

How should Postage Saver save the information for your mailing?

Save it in my mailing list file, so I can do a mail merge.  
(Recommended for Excel, csv, tab-separated, Access or dBase files)

Save it in a separate file and I'll import it into my file.  
(Recommended for Filemaker Pro users)

Don't save anything.  
Just create postal paperwork, tray tags, and preparation instructions.

If you chose "Save it in a separate file":

How should it be named?

Name it "P\$sort1.txt", without asking

Let me name it each time.

What file format should be used?

Comma-separated (.csv)

Tab-delimited (.tab)

4.) After the information screens are complete, you will be asked to choose the file you want to sort. Navigate to the file you exported from Filemaker Pro (not your actual Filemaker Pro file) and select it.

5.) 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 file that Postage \$aver needs to get information from. 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 Access file above, or can be split into two columns):

Entire Zip Code:

First 5 Digits:

Last 4 Digits:

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 Access file shown above:

Entire Zip Code:

First 5 Digits:

Last 4 Digits:

- Company
- Street Address
- City
- State
- Zip

Since this 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:

Entire Zip Code:

First 5 Digits:

Last 4 Digits:

- Company
- Street Address
- City
- State
- Zip

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

Entire Zip Code:

First 5 Digits:

Last 4 Digits:

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.

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

6.) 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.

7.) After printing, Postage Saver will save the sorting information, Optional Endorsement Line (if applicable), and barcoding information (if applicable) in a new file. Depending on your choice on the Preferences screen, discussed above, Postage Saver will either ask you where to save the file and under what name, or will save it as P\$sort1.txt, in the Documents folder.

### **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 with 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 is blank if you are not preparing bundled mail.)
- Barcode (if used)
- Barcode Serial Number (if used)

**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 are doing a barcoded mailing, the barcodes will show up in the field you selected for them in Filemaker Pro, but they will be in letter format, not barcode format. The barcode column will have something like this:

TADTAFTDTFDDDAATADTTDTDTFDDAFDFDTFTAFAFFDAAFDFFFDDTTDADTDFTDAAAT

To change these into the correct bars, choose "SmartBars12" as the font for this field, set at 12 point. 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 Saver.

## **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.