



Quick Start Instructions for Using Smart Barcoder for Mac with Filemaker Pro files

Installing the Smart Barcoder 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 "InstallSmartBarcoderLion.dmg " or "InstallSmartBarcoderSL.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.
-

Running a quick demonstration using the Smart Barcoder sample file

We suggest you run the sample file before using Smart Barcoder on your own file. You won't have to set anything up and you can see how Smart Barcoder 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 you own files.

This demonstration is for using Smart Barcoder to add barcodes to a mailing list file. If you are using Smart Barcoder to create a single barcode for a reply mail layout, or using Smart Barcoder to create tray/sack tags, please see instructions for those functions later in this document.

- 1.) After installing the Smart Barcoder demo, double-click the Smart Barcoder icon (the barcode icon) 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 Smart Barcoder, go to the "Barcodes for Addresses" menu and select "Add barcodes to a file of addresses". You will see a setup screen. For a quick demo, just click "next" on this 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 the screen if you want to enter your own information.
- 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 "Smart Barcoder Sample" (or "Smart Barcoder Sample.xls").
- 4.) The next screen will verify that Smart Barcoder can read the file, and will show you how many addresses the file contains. Click Finish to begin adding barcodes to the file. Smart Barcoder will work through the sample file and tell you the results when it is finished.
- 5.) Now you can open the "Smart Barcoder Sample" file in Excel to see the finished file. You will see the barcodes in the "barcode" column, but they will be in letter format, not barcode format. For example, the column will have something like:

TADTAFTDTFDDDAATADTTDTDTFDDAFDFDTFTAFAFFDAAFDFFFDDTTDADTDFTDAAT

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 Smart Barcoder to Add Barcodes to Your Own Files

Running your own file is not much more difficult than running the sample file. Smart Barcoder will run most mailing list files without much modification, but you will need to provide a field for Smart Barcoder to add the barcodes, and there are a few additional fields you may want to add.

CASS-Certification required for barcoded mail:

USPS requires that before barcodes are added to a mailing list, the list be "CASS-Certified". That means that the list is compared to the official national list of zip+4 codes to make sure each zip+4 code is correct, and to provide you with the USPS two-digit delivery-point code. Software to CASS-Certify a list is generally far too expensive for most small-to-midsize mailers, but there are online services that will do this for you for a low cost (typically \$20 for a small list.) Once your list is CASS-Certified, you can use it on your mail for up to 6 months without certifying again.

Companies that provide CASS-Certification services include [Smarty Streets](#), [Mailnet](#), [Lorton Data](#), and [Anchor Computer](#).

USPS Mailer ID required for Intelligent Mail barcodes:

To create Intelligent Mail barcodes (IMBs), you need an official USPS 'mailer ID'. This is not the same as your permit number or CRID number. You can apply for your mailer ID on the [USPS mailer ID web page](#).

Setting up your Filemaker Pro file to use with Smart Barcoder:

For Smart Barcoder to read your Filemaker Pro file, you just need to have each part of the address in a separate field, and you need a field for the barcode. Smart Barcoder 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 should be **TEXT field type**, not number field type. Barcoding requires complete 9-digit zip codes. You cannot create barcodes if you only have 5-digit zip codes.
- A field with the two-digit delivery-point code **OR** a field with the entire street address, including any suite number or apartment number. The delivery-point code is a two-digit code that you get when you have your list CASS-Certified. The field for the delivery-point field should be **TEXT field type**.

You can use the street address instead of the delivery-point code, but the barcode you get will only be accurate if the address is for a single-unit building. For buildings with more than one mailbox, you need to have the delivery-point code. The column for the street address can be a general format column.

- A field for Smart Barcoder to use to fill in the barcode. This field should be text field type.
- If your mailing is flat-sized and uses Optional Endorsement Lines (OELs). Smart Barcoder must encode the OEL for each piece of mail into the barcode, so your mailing list file must include a field containing the OEL. The field for the OEL should be text field type.

OELs look like "***** 3D 770" and are only used for bundled mail – mail that is required to be rubber banded into bundles rather than just placed in a tray. 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 use stickers, you do not need to include an OEL column when creating an IMB.

- IMBs can also contain a unique serial number for each piece of mail. (If you use "full-service IMBs", a unique serial number is required. For basic service, it is optional.) If you want to have a serial number for each piece of mail, you can either provide it in your file, or Smart Barcoder can assign it. Either way, you need a field in your Access table for the serial number. It should be number field type.

Exporting to Smart Barcoder:

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.

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 complete zip code and delivery-point code or address to the "field export order" box. Also, if you are using Optional Endorsement Lines for a flat-sized mailing, move the field containing the OELs to the "field export order" box. And, if your file has unique serial numbers for each address in this mailing and you want to use them, move that field as well.

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, 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 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.

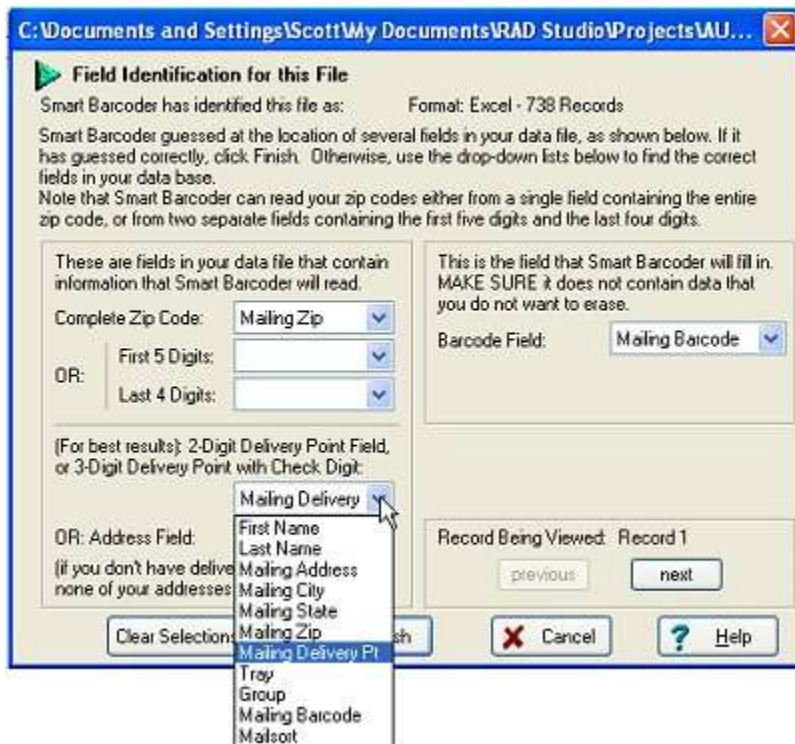
Running Smart Barcoder:

1.) After installing the Smart Barcoder demo, double-click the Smart Barcoder icon (the barcode icon) 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 Smart Barcoder, go to the "Barcodes for Addresses" menu and select "Add barcodes to a file of addresses". You will see a screen asking for information needed to create the barcodes. For an actual mailing, you need to fill in the information that applies to your own mailings. For Filemaker Pro files, you should select "Create a separate file of barcodes only", for the question that asks "Where should the barcodes be saved". There is complete help information on the screen.

3.) 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.

4.) The next screen will verify that Smart Barcoder can read the file, and will show you how many addresses the file contains. Smart Barcoder has tried to automatically figure out which fields in the export file are used for zip code, delivery-point code or street address, barcodes, and, if necessary, OELs and serial numbers, and will show you those guesses on this screen.



The white boxes show the fields in your export file that Smart Barcoder has guessed are the ones it should use. In this example, Smart Barcoder 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 Smart Barcoder needs. In the screen above, the user is selecting the field called "Mailing Delivery Point" as the field where Smart Barcoder will find the delivery-point code 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.

5.) Once you have identified all of the fields you need, click "Finish". Smart Barcoder will ask where you want to save the barcode file. Type a name and choose a location for the file. This is not the same file that you exported from Filemaker Pro for Smart Barcoder to read. This is the file that Smart Barcoder will create to give information back to Filemaker Pro. Make sure you remember the name of the file and where you saved it.

6.) Smart Barcoder will move on to create barcodes. After calculating the barcodes, Smart Barcoder will tell you how many it was able to add, and what problems it may have found that prevented it from adding barcodes to some of the addresses

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 barcode file that you just saved in Smart Barcoder (not the file you exported from Filemaker Pro earlier).

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

- Barcode characters
- 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.

You will see the barcodes in the "barcode" field, but they will be in letter format, not barcode format. For example, the column will have something like:

TADTAFTDTFDDDAATADTTDTDTFDDAFDFDTFTAFFDAFFDAFDFFFTDDDTTDADTDFDTDAAT

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 Smart Barcoder. 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.

Using Smart Barcoder to Create Barcodes for Reply Mail Layouts

- 1.) Double-click the Smart Barcoder icon (the barcode icon) in your Applications folder. If you are asked for a registration code and you are running Smart Barcoder as a demo, just click "Run As Demo" to continue your demo without entering any codes.
- 2.) Select "Barcodes for Addresses" and then select "Create a Single Reply Mail Barcode".
- 3.) Fill in the selections and information on the screen. When you have entered the required information, the barcode will be displayed, and a line of letters will appear in the Barcode Characters box. You can either click Print Code, to print a copy of the barcode, or double-click in the Barcode Characters box to copy the characters to a document.
- 4.) If you copy the barcode characters to a document, you will need to change the characters into bars by using SmartBars12 font that was included in the installer. Smartbars12 should be in the font menu of the application you are using to create the document (Word, Publisher, etc.). Once you have pasted the barcode characters into your document, change the font for those characters to SmartBars12. When you use Smartbars12, you must use it at 12 point size for your barcodes to meet USPS size and spacing requirements.

Using Smart Barcoder to Create Barcoded Tray or Sack Tags

- 1.) Double-click the Smart Barcoder icon (the barcode icon) in your Applications folder. If you are asked for a registration code and you are running Smart Barcoder as a demo, just click "Run As Demo" to continue your demo without entering any codes.
- 2.) Select Barcoded Tags/Placards and then select either traditional barcoded tray/sack tags or the newer Intelligent Mail (IMB) tags. Note that IMB tags are required for barcoded mailings. Mailers preparing nonbarcoded mail can continue to use traditional barcoded tray/sack tags or may use the newer IMB tags.
- 3.) Make the selections and fill in the information required on the set up screen. Then click "next".
- 4.) On the next screen, you can enter information to create up to ten tags at a time. When you click Print, the tags will be printed in a format designed to align with standard business card sheets, available at most office supply outlets.

Using Smart Barcoder to Create Barcoded Container/Pallet Placards

- 1.) Double-click the Smart Barcoder icon (the barcode icon) in your Applications folder. If you are asked for a registration code and you are running Smart Barcoder as a demo, just click "Run As Demo" to continue your demo without entering any codes.
- 2.) Select Barcoded Tags/Placards and then "Create and Print Container Placards".
- 3.) Make the selections and fill in the information required on the set up screen. Then click "next".
- 4.) On the next screen, enter details for the placard. When you click Print, the placard will be printed in a format designed to align with letter-sized paper.

Need More Help?

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