



Quick Start Instructions for Using Smart Barcoder for Windows with Microsoft Excel files (.xls or .xlsx)

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.

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), 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 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 (or your "My 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:

TADTAFTDTFDDDAATADTTDTDTFDDAFDFDTFTAFAFFDAAFDFFFTDDTTDADTFDTDAAT

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 column for Smart Barcoder to add the barcodes, and there are a few additional columns 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 Microsoft Excel file to use with Smart Barcoder:

For Smart Barcoder to read your Excel file, you just need to have each part of the address in a separate column, and you need a column for the barcode. Smart Barcoder 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. Barcoding requires complete 9-digit zip codes. You cannot create barcodes if you only have 5-digit zip codes.

- A column with the two-digit delivery-point code **OR** a column 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 column for the delivery-point field must be a **TEXT format** column.

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 column for Smart Barcoder to use to fill in the barcode. This can be a general format column.

- 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 can be a general format column.

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 column in your Excel file for the serial number. It can be a general format column.

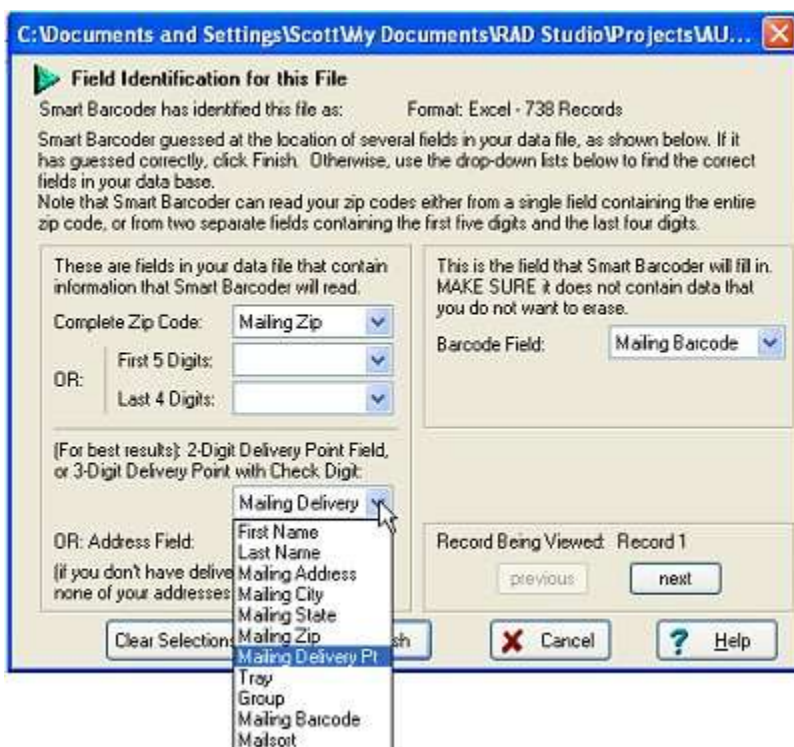
Running Smart Barcoder:

1.) After installing the Smart Barcoder demo, double-click the Smart Barcoder icon (the barcode), 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 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. 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 add barcodes to. Navigate to your Excel file and select it. If your file has more than one worksheet, Smart Barcoder will ask you to select the correct one.

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 columns in your Excel worksheet 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 columns in your Excel worksheet 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 Excel column called "Mailing Zip", and that it needs to put the barcodes in the column called "Mailing Barcode".

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 Smart Barcoder needs. In the screen above, the user is selecting the Excel column called "Mailing Delivery Point" as the Excel column where Smart Barcoder will find the delivery-point code 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 Smart Barcoder will move on to add barcodes to the file.

5.) 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

6.) You can open your file in Excel to see the finished file. You can print the addresses, including the barcodes, using a mail merge in Word or another word processing program.

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

TADTAFTDTFDDDAATADTTDTDTFDDAFDFDTFTAFAFFDAAFDFFFTDDTTDADTDFDTDAAT

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 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 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 "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.