



# SmartMailer™ **Mailing Assistant**

## Reference Document

**STEP 1: Prepare for the Mailing.**

1. Speak with the Business Mail Acceptance Specialist at your local Post Office:

<b>Local Post Office location</b>	
<b>Local Post Office Phone #</b>	
<b>Mail Acceptance Specialist</b>	
<b>Bulk Mail Center</b>	
<b>Sectional Center Facility</b>	

- a. Apply for Presort Permit (annual renewal required):
    - First Class Presort
    - OR**
    - Standard Presort
    - OR**
    - Both
  - b. Decide on postage payment options:
    - Postage Meter
    - Permit Mail (additional one-time permit required)
    - Precanceled Stamp.
  - c. Get supplies needed to package materials. These include: Rubber Bands, Stickers, Trays, Tubs (for First Class Presort flats) or Sacks (for Standard Presort Flats), Sleeves, Tray Labels, Strapping.
  - d. Select the inscription and/or permit for your meter, if applicable:
  - e. Call the Pitney Bowes Supply Line for:
    - Blank Tray, Tub, and Sack labels (tags)
    - Proper Ink for the mail job
    - Obtain a Supply Line catalog by calling: (800) 243-7824.
2. Gather needed materials.
    - a. Make sure your mail list is on the computer, and that you know the location of the file.
    - b. Bring all mailing materials, including envelopes, labels and inserts to the work area.

## STEP 2: Open the mail list.

1. Select **SmartMailer Classic** to launch the SmartMailer™ application.
  2. Open your mail list:
    - a. The last mail list that was used will display. (SAMPLE1.DBF opens the first time you run SmartMailer™ after installation).
    - b. To open a different DBF list:
      - Select **File > Open**.
      - Navigate to your mail list.
      - **Select the mail list**, and then click **Open**. If the mail list has never been used by SmartMailer™, you will have to **Identify Fields** to tell SmartMailer™ which fields in your list contain the required address information.
      - If your mail list is **not a DBF file**, you need to **Import** it into SmartMailer™ using either the **Easy Import** method or the **Standard Import** method.
        - Select **File > Easy Import** to start the **Easy Import Wizard**. Follow the prompts. This method is ideal for repetitive list importing and applies only to list structures that have been previously imported.
- OR**
- Select **File > Import** to start the **Import Wizard**. Follow the prompts.

**NOTE:** If you are importing a Fixed Format ASCII Text file, follow the checklist by this name in SmartMailer. Go to **Help > Mailing Assistant > View Checklists > Fixed Format ASCII Text**.

### **STEP 3: Identify Address Fields in your mail list.**

1. If the field names in your mail list do not match the required SmartMailer™ field names, for example, Street, City, State, Unit, ZIP, ZIP+4, you need to identify these fields.
2. To identify fields in your mail list:
  - a. Select **File > Identify Fields**.
  - b. Match the required fields and any other standard fields to an equivalent field in your mail list.
  - c. At a minimum, you must identify the Street, Unit, City, State, ZIP, ZIP+4, and ERROR CODE fields.
  - d. To get postal discounts on a presorted mailing, you must identify the fields in step c, and the following fields: DPBC, CRRT, PS\_5DS, PS\_AUTOOCR, PS\_ZIPLEVL, PS\_ECODE, PS\_SEQ, PS\_DIR, PS\_SRT\_SEQ, PS\_METHOD, PS\_TRYNUM, PS\_PKGNUM,
3. Click **OK** to save your settings and close the Identify Fields screen.

## STEP 4: Postal Code the Mail List (Verify for Discounts)

1. Select **Process Mail > Postal Code > Setup** to display the Postal Coding Setup screen.
2. Verify settings for Case Standardization, Postal Coding Completed Message, List Processor, and Options.
3. Click **OK** to save your Postal Coding settings and close the Setup screen.

**NOTE:** Once these settings are selected, they become the default settings and only have to be reset if options need to be changed.

4. Select **Process Mail > Postal Code > Verify for Discounts** to start the postal coding process. The process will run unattended.
5. When Postal Coding finishes, click **OK** on the CASS Postal Coding Status screen.

**NOTE:** OK will display only if that selection was enabled on the Postal Coding Completed Message section of the Postal Coding Setup screen.

6. Upon completion of the Postal Coding process, SmartMailer™ creates the required USPS 3553 CASS Report. You need to print this report and keep it on file for at least one year from the date that your mailing is submitted at the Post Office.