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**Notes****About the Training**

The SmartMailer for Windows training program has been updated to reflect new information and associated procedures.

This program works with the following versions of SmartMailer software:

- Windows 95/98/Me
- Windows NT
- Windows 2000

**Prerequisites**

- You must be Windows 95/98 certified.
- You must have postal knowledge.

**Training Materials Needed:**

The following materials should be present in your training class:

- Quick Reference
- Student Workbook
- SmartMailer application CD (2 discs)
- Document/Envelope printer

Report any inconsistencies to your instructor.

Note:

Acrobat Reader must be manually installed before printing any PDF formatted reports. To install Acrobat Reader:

1. Click START>RUN.
2. Type D:\DOCUMENTS\ADOBE ACROBAT. If your CD-ROM drive letter is not D:, substitute the proper letter in place of the D.
3. Press ENTER.
4. Double click the Acroread 50.exe file.
5. Follow the on screen display to complete installation.

**System Requirements**

The computer designated for SmartMailer should have *at least* the following requirements:

- CPU: 200 MHz or better
- RAM: 32 MB extended (more recommended)
- OS: Windows 95/98/Me or NT 4.0 with Service Pack 4,5, 6A, or Windows 2000 with or without Service Pack 1.
- Monitor: VGA color
- HD space: 30 MB minimum for installation
- CD-ROM: 8X minimum: 24X recommended
- Mouse: Required
- Floppy Disk Drive: 3.5" High Density
- Internet Connection: Internet Explorer 4.0 or higher (for ForwardTrak™ Net)

**About the Student Workbook**

The Student Workbook is divided into 12 units. Each unit has specific objectives that are listed at the beginning of the unit. Each section of the unit has information that explains the concept of that section.

Each unit contains exercises. These are designed to help you process the information contained in that unit and to have you practice with the SmartMailer software. At the end of each unit is a quiz to evaluate your comprehension of the material in the section.

**Validation and Certification**

This classroom training program does not involve use of a Certification Test disk. To become certified, you must do the following:

1. Complete all workbook exercises to your instructor's satisfaction.
2. Obtain your instructor's signature on the training validation sheet (included in the workbook).

## Notes

### SmartMailer Software

The SmartMailer software package contains the following items:

- Application CD-ROM
- Postal Data CD-ROM

The application CD-ROM contains the files needed to run all functions. It also houses two databases for practicing with the software.

Postal Data CD-ROM contains current and valid address information. The Postal Coding CD-ROM is dated and must be updated periodically to continue using the function.

### README

The CD-ROM disc has a README file that contains last minute information that was available after the HELP files were finished. Read this file during this training course; it may have answers to questions that you may have. The README file will contain certain technical information that will not be placed in HELP files.

### Features

The current application is completely 32-bit code. This version contains the following:

- Constantly changing postal coding-according to yearly CASS regulations
- Envelope Designer Plus
- Printer installations for All Address-Right printers and DocuMatch
- Combine fields capabilities - part of the mail list mgmt. functions
- Sort File - (.srt) generated for all presorted lists
- Advanced and Easy Presort Setups
- Move Update capability.

### Practice Files

The SmartMailer application provides two database files for use in training. These files are named Sample1.dbf and Sampsrtdbf. They reside in the lists subdirectory of the PSMWIN directory.

Your instructor will also provide two additional database files for your use during training. The DDSample.DBF should be used with Unit Six to do duplicate detection. The FTsample.DBF can be used with Unit Ten to do move updating.

During the training you will make copies of certain files and save them. You may save them either in the PSMWIN directory or the LISTS subdirectory. It doesn't make any difference which one you choose as long as you remember where you have stored them.

**Warning:**  
**Never use a customer's actual live database or address file for training even if you have permission to do so. This could result in legal problems.**

**Notes****Unit 1: Basic Functions**

The Basic Functions unit provides instructions for loading SmartMailer software and preparing the hard disk for storing training files. This unit also provides information on database terminology and use of the various menu items.

**Section 1.1: Getting Ready**

This section steps you through installing SmartMailer software and preparing the computer's hard disk.

**Objectives**

After completing this section, you will be able to:

- Load SmartMailer software
- Locate the README file.

**Preparing the Hard Disk**

You will be creating files during the training. These files will be unique to you. If there are files on your disk from someone else who has participated in this training, they can interfere with your results and cause corruption of your files.

To ensure successful completion of this training program you must clear off any old training files that may exist on your hard disk.

**Note:**

Failure to clear old training files can result in wrong information appearing in your testing files, invalidating your results and necessitating a retake of the training session.

**Loading SmartMailer**

Your instructor will demonstrate the installation procedure before you begin.

To install the SmartMailer application, follow these steps:

1. Remove the application CD-ROM from the package and insert it into the CD-ROM drive
2. If the application CD-ROM doesn't open on its own, click START>RUN>BROWSE.
3. Select SETUP.EXE from the CD file list, then click OK. The install process will begin.
4. Follow the prompts to complete the installation. Select all installable modules, including print drivers. Refer to the Quick Start Card for additional install information.

**README Files**

Like most applications, SmartMailer contains a README file with information that may affect what you are intending to do. You can use Window's NOTEPAD or WORDPAD to examine this file to learn if there is any information that may be pertinent.

The install program (setup) creates an icon that automatically displays this file. You should print this file for your records.

**Ready To Begin**

With your files in order you are ready to start the training session. If you have any questions on how to use this Student Workbook, refer to the Introduction Unit.

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**Notes****Section 1.2: Understanding Database Terms**

Field, length, names, and record are terms that need to be understood.

**Objectives**

After completing this section, you will be able to:

- Identify a field
- Identify a record

**Fields**

A database can store information of all sorts. With SmartMailer, we are concerned with address information.

Address information is stored in "FIELDS". A field is designed to store only one category of information. If the data to be stored contains many types of information, there must be many different fields.

As an example, if a database is to store a person's first name, last name, and telephone number, then there must be three different fields:

- First name field
- Last name field
- Telephone number field.

Most databases allow hundreds of fields to be created.

**Lengths**

Most databases have fixed length fields. When creating a database, the user must define that length for each field. If the user isn't careful, the wrong field length may be defined.

As an example, if the user defines the telephone field as 8 characters, the field would be able to hold a number like 426-0000 with no problem. If the user attempted to enter the number (203) 426-0000 into the 8 character field, there wouldn't be enough room for all of the characters. The only information the field would actually contain is (203) 42. The last 6 characters (6-0000) would be lost. To store a number like (203) 426-0000, the field must be set up for fourteen characters.

Exercise care when setting the lengths of fields that are to contain a person's name, or names of cities since the lengths of the entered data cannot be predetermined.

If a name field is set to a maximum of 24 characters and a person's name contains 26 characters, the last two characters cannot be stored and will be missing from the data entered. There isn't much that can be done in a case like this (other than redefining the database for 26 characters instead of 24).

If you reserve large number characters for this field, you needlessly consume computer memory since the memory must be set aside whether it's used or not. If a database field is set up for 30 characters and data is entered, and later on someone shortens the field length, some of the data entered could be lost.

**Names**

Fields are given names such as those shown below:

LASTNAME  
FIRSTNAME  
STREET  
CITY  
STATE  
ZIP

**Notes****UNIT 5: Postal Coding**

The Postal Coding process matches addresses in a mail list against the most recent list of deliverable addresses as provided by the USPS. During the Postal Coding process, SmartMailer marks all addresses that could not be matched with an error code. (Refer to SmartMailer's on-line Help system for a list of error codes.)

**Objectives**

After completing this section, you will be able to:

- Set up the Postal Coding
- Perform the VERIFY FOR DISCOUNTS Postal Code function
- Perform the VERIFY CURRENT ADDRESS Postal Code function
- Perform the VERIFY SELECTIVELY Postal Code function
- Interpret error codes and make corrections
- Perform the Identify Fields function of the FILE menu
- Print a Postal Code report

Before performing Postal Coding, make sure the open mail list contains the required fields and proper Field Identifiers. The field identification process is like a matching game. SmartMailer lists the required and standard fields on one side of the Identify Fields window. On the opposite side of the window, SmartMailer displays the identifier currently in that field in the open mail list. If the fields don't match, or if there is no field assigned, you need to make a match by selecting the appropriate field name from the drop down list. Failure to do this results in Postal Coding problems. The fields required for Postal Coding are:

- Street
- City
- State
- ZIP
- ZIP+4
- DPBC
- CRRT

To perform Postal Coding on a mail list, the Postal Coding CD must be in the CD-ROM drive. Make sure the CD is the current issue. Using an expired database will cause an error. SmartMailer will not allow you to Postal Code with an expired database.

There are four Postal Coding options that are accessed by selecting PROCESS MAIL>POSTAL CODE:

- VERIFY FOR DISCOUNTS (formerly known as BATCH)
- VERIFY SELECTIVELY
- VERIFY CURRENT ADDRESS (formerly known as INTERACTIVE)
- SETUP

**Section 5.1: Verify for Discounts**

This mode corrects city names and state abbreviations on all active records, and will assign ZIP+4 codes, ZIP codes, carrier routes and Delivery Point Bar codes. This mode should be run before running the VERIFY CURRENT ADDRESS or VERIFY SELECTIVELY modes to list any errors that might exist. If no errors are found, it's not necessary to interactively code mail list records. If it is necessary to interactively code records with errors, the VERIFY FOR DISCOUNTS mode must be run again to generate CASS information. The Post Office requires that a mailing have a CASS report sheet for it to qualify for discounts.

Two reports are generated when VERIFY FOR DISCOUNTS finishes running:

- CASS 3553 report (one sheet)
- SUMMARY report (three sheets)

**Notes**

**CASS Report**

The CASS Report shows details of Smart-Mailer application software and of the batch processing itself. This report is required by USPS to obtain discount rates.

**Note:**

Data for this report is generated ONLY when the VERIFY FOR DISCOUNTS mode is run.

**SUMMARY Report**

The SUMMARY shows options that were selected for the postal encoding process. The SUMMARY report is for the customer's internal use and is not required by the USPS.

Refer to Unit 11 for more information on these reports.

**Section 5.2: Verify Selectively**

This mode allows the user to postal code all addresses or only those unassigned during the VERIFY FOR DISCOUNTS mode. It will also allow the user to choose the option to assign ZIP fields only. The assign ZIP fields only option is run in non-CASS mode. No CASS or Summary reports are generated using this method.

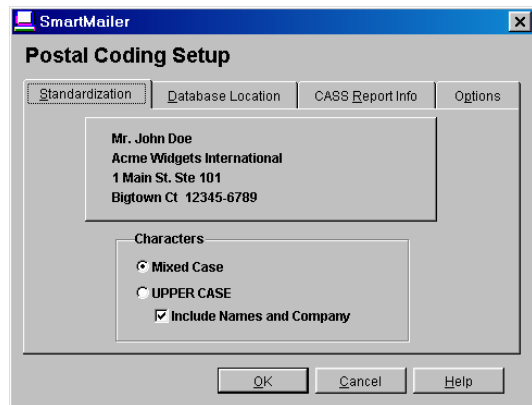
**Section 5.3: Verify Current Address**

The primary use of this mode is to interactively modify records that have been tagged as having a postal coding error.

This mode does NOT produce the data required to create or update the CASS 3553 and Summary reports. As a result, you **MUST** run the VERIFY FOR DISCOUNTS mode after the VERIFY CURRENT ADDRESS mode is used and errors have been corrected.

**Section 5.4: Setup**

Before doing anything, you must enter the Postal Coding parameters to tell Smart-Mailer how to look at the data. The SETUP menu option provides access to the available parameters. Four tabs in the Postal Coding setup window present the available setup options. The tab content is explained next.



**Setup Tabs**

- Standardization (Case)

**Note:**

This is not a spell checker. Names such as McDonald will display as mcdonald (or MCDONALD if upper case has been selected)

- The display shows an example of how the address will look. You may adjust the character's attributes in the lower box. You will see the effect in the example display immediately.
- Mixed Case - Check this option if you don't want all caps.
- Upper Case - Check this option if all database data is in upper case letters only, or if you want the address data to be converted to upper case letters.
- Include Company Name - Check this option to apply the case setting to the identified name and company fields.

**Notes**

- Database Location  
The information box at the bottom of the screen shows file location information for the ZIP+4 and the City checking databases. These files are located on the CD ROM disc. The files are:
  - CITY.DIR
  - ZIP4US.DIR

If your CD ROM drive is defined as D, then D:\ will appear in the City/State and ZIP5 and National boxes.

This window also allows the user to specify a different location for the database files. Performance on Postal Coding and Presorting operations can be improved dramatically by moving these files to the hard drive.

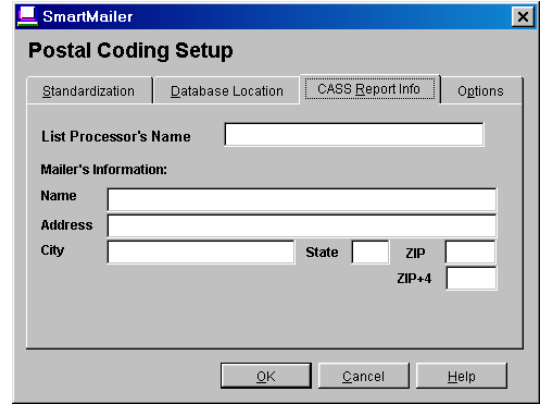
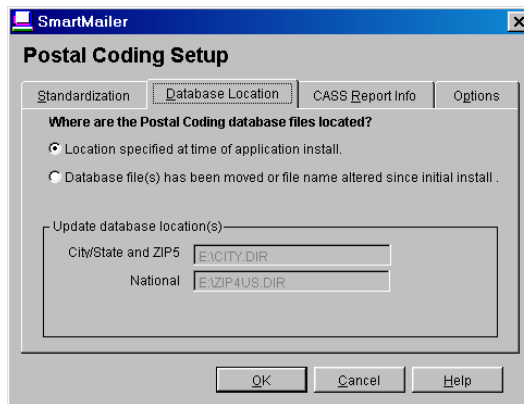
**Note:**  
One of the options of the HELP menu will indicate the last time a Postal Coding was performed.

- CASS Report Info

**Note:**  
You must enter the correct information in this window, or the CASS report will not be accepted by the Post Office.

- List Processor's Name - Enter the name of the company processing the mail list.
- Mailer's Information - Enter the name and address of the person/company who owns the database and will be bringing the mail to the Post Office.

**Note:**  
The List Processor's Name and the Mailer's Information will be added to the appropriate boxes on the CASS report after the user runs their list in the VERIFY FOR DISCOUNTS mode.

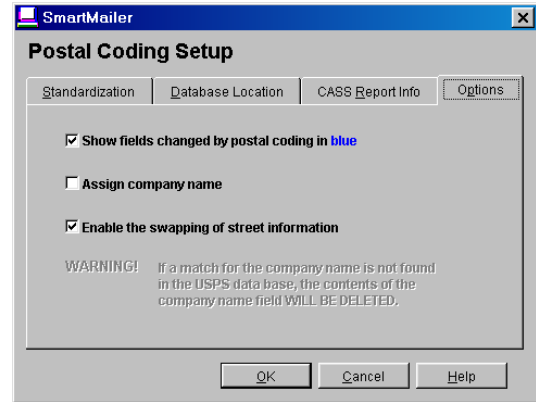


## Notes

- Options
  - Show fields changed by postal coding in blue – If selected, any data in any assigned field that is changed during the postal coding process will change to the color blue.  
  
To use this feature, you must have the {Fields Changed} field mapped to some field (usually {CHG\_STATUS}). Use the Identify Fields procedure to make sure the field is mapped properly.
  - Assign Company Name - If the user selects Assign Company Name and no match is found for the company name in the USPS database, the contents of the company field will be deleted.

**Warning:**  
***The Assign Company Name box should not be checked unless the user is certain that all of the company names in the mail list exist in the USPS database.***

- Enable the swapping of street information - This option works only in Verify for Discounts mode when the mail list has two street fields identified. Checking this box allows valid addresses found in the alternate street field to be placed in the primary street field. In these cases, the data in the two fields “swap” places. If no match is found, the record is error-coded.



When you have completed the Postal Coding Setup, click OK.