



Mailables Hub
Bringing Commercial Mailing,
Resources, and Solutions Together

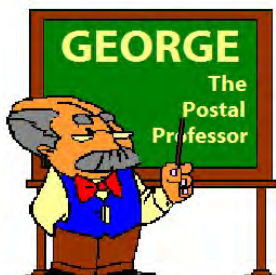


Customized Postal Training Programs

Present

MAILER'S BOOTCAMP via ZOOM

August 2025



Guided by
George Heinrich, PPhD
CQMPS, PIG, CMQCS, OMG, CMDP, PIMP

Proud to partner with the following organizations to provide specialized educational opportunities





Welcome to

MAILER’S
BOOTCAMP



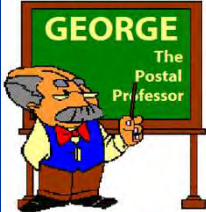
Mailers Hub
Bringing Commercial Mailing,
Resources, and Solutions Together

Also Known As....

A Plethora of Postal
Policies Presented
to Provide Proper
Postal Preparation
and Postage Pricing



Meet Your Guide



G. P. “George” Heinrich, PPhD
CQMPS, OMG, CMQCS, PIG, CMDP, PIMP

The Postal Professor



Your First Quiz

- Please answer the following 5 questions
- 1) WHAT IS YOUR NAME? _____
- 2) WHAT IS TODAY’S DATE? _____
- 3) WHO DO YOU WORK FOR? _____
- 4) YOUR SALARY IS PAID BY? _____
- 5) HOW MUCH YOU EARN IS DETERMINED BY?



Introduction

- What is Postal Bootcamp?
 - It’s a course to get you in shape so you can go to battle with the USPS
- Seriously, it’s a course designed to help you understand the relationship between...
 - Postal Regulations
 - Mailpiece Design
 - Processing and Postage Costs
- Bootcamp was originally designed to help printers who added mailing services understand what is really involved in preparing discounted mail



Why We Offer This Course

- The more knowledge you have about mailpiece design and postal regulations, the better you can serve your customers.
- What you learn in this course will allow you to be proactive and identify problem areas before it’s too late.
 - That’s ink or toner on paper

*The Professor’s Seven P’s
Proper Prior Planning Prevents
Production & Postal Problems*





Agenda

- First things First
- Meet your Uncontrollable Business Partner
- LPC, SCF, BMEU, CASS, DPV, NCOA, MID, CRID, STID, HUH?
- The Incredible Bulk
- It’s in a Class By Itself
- Yes, Size does Matter!
- What’s all the Fuss about N, S, E, W?
- What do those Funny Little Lines Do?
- The USPS is Watching You!

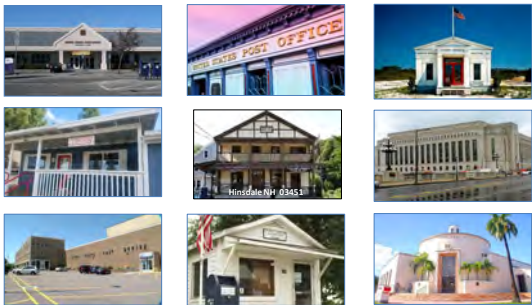


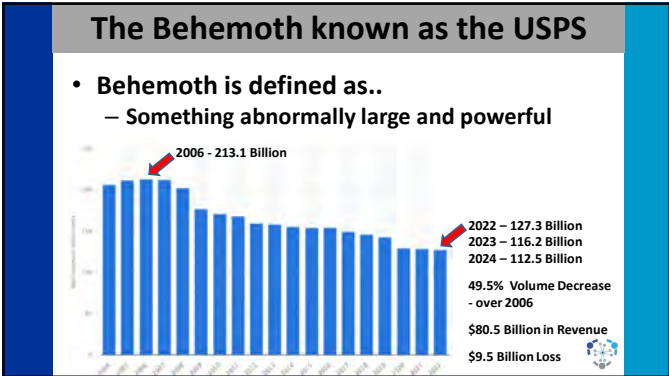
Agenda

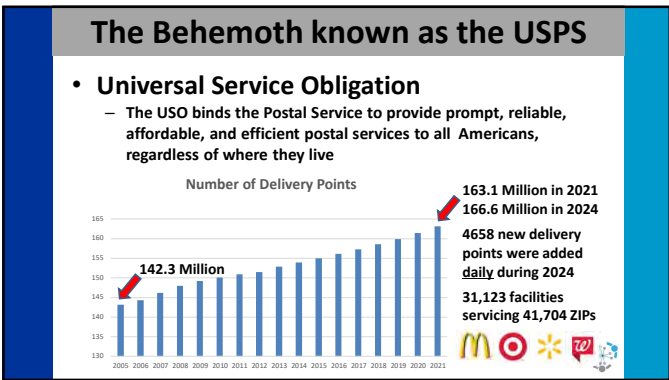
- What? It’s all Sorted by Hand, isn’t it?
- They want their Money
- Send it back, Please!
- Data is not a 4-letter word
- How come we have to do all the work?
- More Fun Stuff from the USPS
- Oop\$, Goof\$ & Flub\$
- The Last Word
- Meet at the Bar

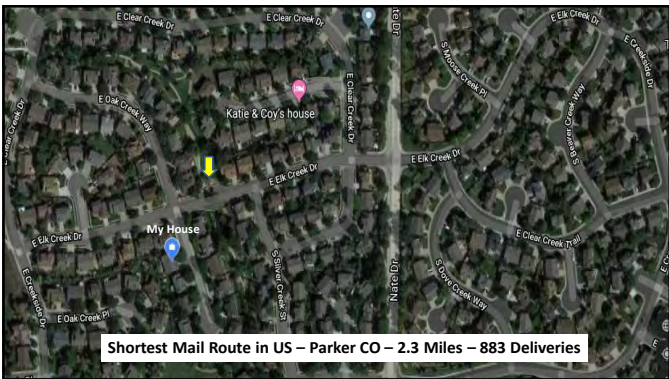


Meet Your Uncontrollable Business Partner













Longest Rural Route in US – Bloomfield IA – 187.5 miles – 247 Deliveries

The USPS is in Trouble

- What’s troubling the USPS?
- The USPS is wanting to
 - Close Post Offices
 - Reduce delivery of mail from six days to five
 - Savings of about \$2 billion annually
 - Would three-day residential delivery work?
 - Make postal services more convenient
 - Village PO or Kiosks in supermarkets and malls
 - Sell things other than related to mail
- They must get Congressional blessing to do most of these ideas





NAME	AGE	SEX	HT	WT	HAIR	SKIN	EYES	NOSE	MOUTH	TEETH	THROAT
ADAM	22	M	175	160	BRN	FAIR	BLU	STND	10	10	10
ALAN	25	M	180	170	BLK	FAIR	BLU	STND	10	10	10
ALICE	20	F	160	120	BRN	FAIR	BLU	STND	10	10	10
ALVIN	28	M	185	180	GRY	FAIR	BLU	STND	10	10	10
ANDREW	24	M	178	165	BRN	FAIR	BLU	STND	10	10	10
ANGIE	21	F	165	130	BRN	FAIR	BLU	STND	10	10	10
ANN	23	F	162	125	BRN	FAIR	BLU	STND	10	10	10
ANTHONY	26	M	182	175	BRN	FAIR	BLU	STND	10	10	10
ARND	27	M	188	190	GRY	FAIR	BLU	STND	10	10	10
ARNDT	29	M	190	195	GRY	FAIR	BLU	STND	10	10	10
ARTHUR	30	M	192	200	GRY	FAIR	BLU	STND	10	10	10
ASHTON	24	M	175	165	BRN	FAIR	BLU	STND	10	10	10
AUSTIN	22	M	170	155	BRN	FAIR	BLU	STND	10	10	10
AUSTIN	23	M	172	158	BRN	FAIR	BLU	STND	10	10	10
AUSTIN	24	M	174	160	BRN	FAIR	BLU	STND	10	10	10
AUSTIN	25	M	176	162	BRN	FAIR	BLU	STND	10	10	10
AUSTIN	26	M	178	165	BRN	FAIR	BLU	STND	10	10	10
AUSTIN	27	M	180	168	BRN	FAIR	BLU	STND	10	10	10
AUSTIN	28	M	182	170	BRN	FAIR	BLU	STND	10	10	10
AUSTIN	29	M	184	172	BRN	FAIR	BLU	STND	10	10	10
AUSTIN	30	M	186	175	BRN	FAIR	BLU	STND	10	10	10
AUSTIN	31	M	188	178	BRN	FAIR	BLU	STND	10	10	10
AUSTIN	32	M	190	180	BRN	FAIR	BLU	STND	10	10	10
AUSTIN	33	M	192	182	BRN	FAIR	BLU	STND	10	10	10
AUSTIN	34	M	194	185	BRN	FAIR	BLU	STND	10	10	10
AUSTIN	35	M	196	188	BRN	FAIR	BLU	STND	10	10	10
AUSTIN	36	M	198	190	BRN	FAIR	BLU	STND	10	10	10
AUSTIN	37	M	200	192	BRN	FAIR	BLU	STND	10	10	10
AUSTIN	38	M	202	195	BRN	FAIR	BLU	STND	10	10	10
AUSTIN	39	M	204	198	BRN	FAIR	BLU	STND	10	10	10
AUSTIN	40	M	206	200	BRN	FAIR	BLU	STND	10	10	10
AUSTIN	41	M	208	202	BRN	FAIR	BLU	STND	10	10	10
AUSTIN	42	M	210	205	BRN	FAIR	BLU	STND	10	10	10
AUSTIN	43	M	212	208	BRN	FAIR	BLU	STND	10	10	10
AUSTIN	44	M	214	210	BRN	FAIR	BLU	STND	10	10	10
AUSTIN	45	M	216	212	BRN	FAIR	BLU	STND	10	10	10
AUSTIN	46	M	218	215	BRN	FAIR	BLU	STND	10	10	10
AUSTIN	47	M	220	218	BRN	FAIR	BLU	STND	10	10	10
AUSTIN	48	M	222	220	BRN	FAIR	BLU	STND	10	10	10
AUSTIN	49	M	224	222	BRN	FAIR	BLU	STND	10	10	10
AUSTIN	50	M	226	225	BRN	FAIR	BLU	STND	10	10	10
AUSTIN	51	M	228	228	BRN	FAIR	BLU	STND	10	10	10
AUSTIN	52	M	230	230	BRN	FAIR	BLU	STND	10	10	10
AUSTIN	53	M	232	232	BRN	FAIR	BLU	STND	10	10	10
AUSTIN	54	M	234	23							



Speaking Postal

- Must vs. Should vs. May
 - *Must – Mandatory*
 - *Should – Recommended*
 - *May – Optional*
 - *May not - Mandatory*
- The USPS speaks in acronyms
 - acronym (ak'row-nim') - a word formed from the first letters of a name, for example, NFL for *National Football League*

Speaking Postal

- You too need to learn how to speak in acronyms like the Postal Service
 - USPS
 - United States Postal Service*
 - NBC
 - National Broadcasting Company*
 - ESPN
 - Entertainment & Sports Programming Network*
 - TIOUUSPSA

Speaking Postal

- **CASS - Coding Accuracy Support System**
 - *The test software must pass to become certified*
 - *Process of comparing customer addresses against USPS ZIP+4 data*
 - *Four steps to help validate deliverability*
 - *Does not confirm who lives there*
 - *Required for automation and carrier route rates*
 - *Process is actually called “ZIP+4 Assignment and Address Standardization”*



Speaking Postal

- **DPV - Delivery Point Validation**
 - Part of the CASS process
 - Confirms that the address is deliverable
- **LACS^{link} - Locatable Address Conversion System**
 - Originally created for 911 services
 - Assigns city style addresses to rural addresses
 - Rt 14 Box 23 to 1460 Country View Pl
- **Suite^{link}**
 - Assigns suite/apartment/floor/unit numbers to multi-unit buildings



Speaking Postal

- **COA – Change Of Address**
 - Postal speak for Change of Address information provided to USPS from movers
- **NCOA^{link} - National Change Of Address**
 - Used to meet Move Update requirements
 - Database of all moves in past four years
 - Licensees compare customer data with NCOA database to identify customers who have reported a move
 - Two databases available
 - 18 months and 48 months



Speaking Postal

- **PCOA – Proprietary Change Of Address**
 - Third party change of address information
 - In some cases, gathers more information than USPS NCOA
 - Usually includes moves from those that didn't notify the USPS
 - About 20%
 - May go back more than 4 years
 - May include deceased, suppression and the DMA Do Not Mail data





Speaking Postal

- **IMb – Intelligent Mail Barcode**
 - New style barcode that replaced POSTNET
 - Identifies mailer, class and sortation level of mail and other optional services like tracking
 - Allows unique serial numbers to be assigned to individual pieces
 - The key to how the USPS sorts the mail
- **IMpb – Intelligent Mail Parcel Barcode**
 - Barcode required on parcels
 - Used for scanning and tracking purposes



Speaking Postal

- **CRID – Customer Reference Identification**
 - An 8-digit number that identifies the physical location of a company doing business with the USPS
- **MID – Mailer Identification**
 - A 6 or 9 digit number that helps the USPS identify a mail owner, mail service provider or third party
- **STID – Service Type Identifier**
 - A 3-digit number encoded in the Intelligent Mail Barcode to identify class of mail and which services the USPS are to provide
 - Tracking or Address Change Services or both



Speaking Postal

- **FSM – Folded Self Mailer**
 - A folded self-mailer is formed of panels that are created when one or more unbound sheets are folded together and sealed to make a letter-size mailpiece
- **BOOKLET – Booklet**
 - A booklet is defined as a lettersize mailpiece with a bound edge. Sheets must be saddle stitched, perfect bound, pressed-glued, or joined by another binding method that produces an end where pages are attached together





The
Postal Network

How Mail Moves

The Postal Network

The Postal Network

- The USPS is required by law to provide a level of mail delivery to every address in the US, six days a week
 - This is called the *Universal Service Obligation*
- They deliver more mail to a larger geographical area than any other post in the world, and deliver to about 166 million addresses using....
 - 245,000 carriers, many on foot, some on bikes
 - Air Transportation
 - Boats
 - Ground Transportation
 - Mules



The Postal Network

- The distribution of mail is driven by the ZIPcode
- Each Number has a unique meaning
- The first number designates a geographical area of the US

Postal Area Map ©Copyright TTE, Inc. 2010

The Postal Network

- The 2nd & 3rd number represent a geographic area known as...
 - SCF
 - Sectional Center Facility...or
 - P&DC
 - Processing and Distribution Center
 - There are about 220 of these facilities

The Postal Network

- The 4th & 5th number represent a local Post Office
- Parker CO 80134

- Then the ZIPcode is divided into smaller segments called ZIP+4
- 80134-4832



The Postal Network

- The last two numbers of the address are added to the ZIP+4 to create the Delivery Point – **80134-4832 17**
- Every address is also assigned to a specific Carrier Route
- R050 – 883 deliveries**



The Postal Network

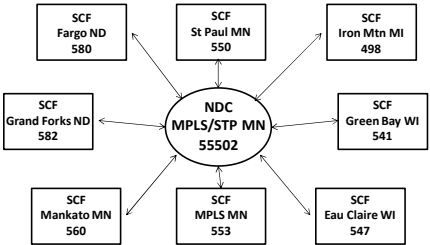
- NDC – National Distribution Center**
A network of 29 primary locations that act as central sorting and distribution facilities for large geographic areas
Trays, sacks and pallets only
No First-Class Mail

NDC MPLS/STP serves ZIP codes beginning with 497-498 (MI), 540-548 (WI), 550-567 (MN), 580-588 (ND)



The Postal Network

- NDC - Network Distribution Centers**





The Postal Network

- **SCF – Sectional Center Facility**
A network of 217 locations that act as a sorting and distribution facilities for mail destined to 5-digit ZIP codes
Processes all classes of individual pieces

SCF MPLS MN serves ZIP codes that begin with 553–555
SCF St Paul MN serves ZIP codes that begin with 540, 550–551
SCF Fargo ND serves ZIP codes that begin with 580-581, 584

The Postal Network

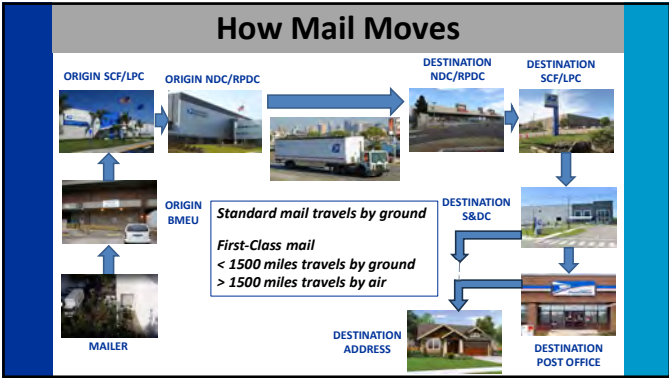
- **SCF – Sectional Center Facilities**

Diagram illustrating the SCF network for St Paul MN 550, showing connections to various regional facilities:

- Mabel MN 55954
- Wyoming MN 55092
- Osceola WI 54020
- La Crosse WI 54061
- St Paul MN 55125
- Moose Lake MN 55795
- Duluth MN 55802
- Embarrass MN 55732

The New Network

- The USPS is changing to a new distribution network over the next 18 months
 - **Regional Processing & Distribution Centers (RPDCs)**
 - Sort mail & packages being sent to other regions
 - Sort packages for delivery in the regional area.
 - **Local Processing Centers (LPCs)**
 - Sort letters & flats to individual mail carrier routes in the regional area.
 - **Sorting & Delivery Centers (SDCs)**
 - Aggregate mail carrier operations from several smaller current locations within some local areas



The Incredible Bulk

Retail

Vs.

Discounted Mail

Retail vs. Discounted

- Retail mail is full rate mail – no discounts
- All barcoding, sorting and transportation is done by the USPS, that’s why they call it “Raw” mail

– You shouldn’t leave outbound mail in your mailbox with the flag up!

- Especially mail that is a financial transaction



Discounted Mail

- The USPS is not allowed to offer discounts based on volume
 - exceptions for Priority Mail Express & QBRM
- Postage discounts are offered for worksharing
 - the printing of the barcode and presorting of the mail before the USPS receives the mail
- Worksharing keeps USPS costs down and allows faster processing and delivery of the mail



Discounted Mail

- Worksharing requires that the mail is prepared by following postal regulations
- Mailpieces not meeting these requirements require additional handling and are subject to higher postage costs and possible delays
- Worksharing benefits
 - Your customers
 - Your company
 - The Postal Service



What Needs to be Done to Earn Discounts

- Pieces compatible with automated equipment
- Accurate Addressing
 - Is the address deliverable?
 - Does Charlie still live at 123 Main St?
- Adding Intelligent Mail Barcodes to pieces, trays or tubs and pallets
- Sorting the mail to get it as close to its final destination before the USPS must handle the individual pieces
- Transporting the mail closer to its destination





Following the Rules

- Whether mailed a retail or discounted rates, mail must be prepared following Postal regulations
- The Domestic Mail Manual (DMM) is the Postal Bible
 - 1862 Pages of rules and regulations
 - On-line at pe.usps.gov
 - Subject to interpretation at mail acceptance



In a Class By Itself

Mailability &
Classes of Mail



Mailability

- Almost anything can be mailed if properly packaged
 - Including eggs, firearms, live animals, meat products and radioactive materials
- Anything considered non-mailable is prohibited from the mails
 - It is not possible to pay a higher rate or surcharge to have a non-mailable piece accepted
- Here are some items that cannot be mailed
 - Ammunition & Explosives
 - Flammable liquids and gases
 - Airbags
 - Cigarettes & Marijuana





Mailability

- Many things that you might think are unmailable actually are, but there are strict guidelines
- Restricted Matter
 - Knives, Firearms & Alcohol, that’s not intoxicating (<.5%)
- Perishable Matter
 - Animals, Plants, Some food items
- Hazardous Matter
 - Radioactive or Biological materials
 - Flammable Materials & Compressed Gasses
- Most explosives and materials requiring a hazmat warning label are also NON-MAILABLE



One Strange Regulation

- DMM 601.8.3.3
 - Small Cold-Blooded Animals
- Small, harmless, cold-blooded animals (except snakes and turtles) that do not require food or water or attention during handling in the mail and that do not create sanitary problems or obnoxious odors are mailable.



(e.g., baby alligators and caimans not more than 20 inches long, bloodworms, earthworms, mealworms, salamanders, leeches, lizards, snails, and tadpoles)



Classes of Mail

- In 2006 the USPS changed the rules on how postage rates are set.
- Rates are broken into two categories by law
- Market Dominant
 - Only the USPS can process & deliver
 - First-Class Mail
 - Standard (Marketing Mail)
 - Periodicals (Magazines & Newspapers)
 - Media Mail & Library Mail
- Competitive
 - Other carriers can process & deliver
 - Priority Express Mail & Priority Mail
 - First-Class Parcels
 - Parcel Select





Classes of Mail

- All mail falls into one of these classes based on content, weight and service level
 - Priority Mail Express*
 - Priority Mail*
 - *These classes are called Expedited Services
 - First-Class Mail
 - Periodicals
 - Standard
 - Now called Marketing Mail by the USPS
 - Package Services



Priority Mail Express

- Overnight delivery in US using the USPS
- USPS had this service before UPS and FedEx
- Delivered 7 days a week, 365 days a year
 - Including Thanksgiving and Christmas
 - Extra fees for Sunday & Holiday delivery
- Only class of mail with a delivery guarantee
 - Post Office to Post Office
 - Post Office to addressee
 - Sometimes two-day delivery



Priority Mail

- Used for expedited delivery of mail
- Usual delivery time two to four business days
- No delivery guarantee but receives special attention and distribution
- First-Class flats weighing over 13 ounces becomes Priority Mail
 - No worksharing discounts for Priority
- Tracking available at no charge
- Special Flat-Rate envelopes and boxes
 - Same price regardless of weight or distance





Priority Mail

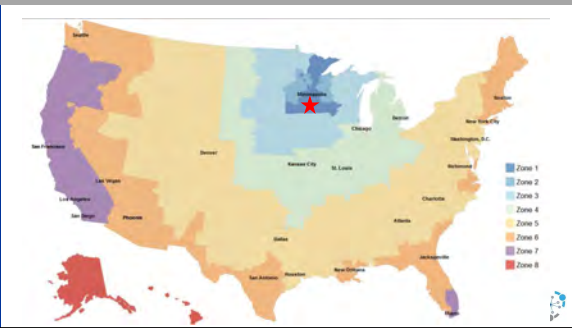
- Anything mailed at Priority Mail rates must be clearly marked Priority
- Pieces over one cubic foot pay dimensional rates
 - You pay for size or weight whichever is greater
- Pieces not in Flat-Rate envelope or boxes pay for both weight and distance (zone charges)
- Zone charges are set by the distance between the origin and destination
 - Zone Charges also apply to some other classes



From Boston



From Minneapolis





From Denver



From Los Angeles



Priority Mail (PMOD)

- **Priority Mail Open and Distribute**
 - A method to drop ship smaller volumes of mail closer to their destination via Priority Mail
 - Maximum weight of any box or sack is 70 lbs.
 - This mail qualifies for entry level discounts and will get to its destination quicker than if the USPS transports it by normal means
 - Usually, 2 to 4 days





First-Class Mail™

- Almost anything can be mailed at First-Class rates
- Certain items **MUST** mail as First-Class
 - Matter to closed to Postal inspection
 - Typewritten or handwritten matter
 - Personal Correspondence
 - Bills and Statements of Account
 - Business Reply Mail (BRM)
- No service guarantee
- First-Class mail can weigh up to 13 ounces
 - Over 13 ounces becomes Priority Mail

First-Class Mail

Some copy looks handwritten but it's not, however you may need to prove that to the USPS

First-Class Mail™

- First-Class rates available for
 - Postcards
 - Specific sizes and weights
 - Envelopes, Folded Self-Mailers and Large Cards
 - Lettersize Booklets
 - Presorted rates only
 - Flats
 - Parcels
 - Former First-Class parcels are now considered part of Ground Advantage



Presorted First-Class Mail™

- Worksharing discounts for presorting First-Class mail before delivery to USPS
- A total of 500 pieces required to earn any discounts
 - To qualify for automation rates, you must have at least of 500 pieces with barcodes
 - Pieces not qualifying for specific presort discounts and included in a presorted mailing must be marked “Single Piece” or “SNGLP”
 - Example - 625 total pieces to be mailed
 - 586 have barcodes and qualify for automation rate
 - Remaining 39 pieces must be marked “SNGLP” and postage paid at full-rate or separated out and mailed at full-rate postage

Presorted First-Class Mail™

- Qualifying pieces must be marked “Presorted” or “Presort”
 - OK to put Presorted in the endorsement line
- Presorted First-Class mail must meet the USPS Move Update requirements
 - NCOA^{link}
 - Address Change Service (ACS)
 - Ancillary Service Endorsements
 - Legal Restraint
 - 99% Accurate
- More details on Move Update in the module on Quality Addressing

First-Class Postcards

- Special sub-class of First-Class only
- Pieces must be a single sheet of cardstock
- Minimum size
 - 3.5” high x 5” long x .007 thick
 - .009 thick if larger than 4 ¼” x 6”
- Maximum size
 - Full Rate – 4 ¼” high x 6” long x .016 thick
 - Presorted – 6” high x 9” long x .016 thick
- Stock must be light in color
- Need 3 ½” from right edge for barcode



Standard Mail

- a.k.a. Marketing Mail
- All Standard Mail is presorted
 - No single piece rates
- Must weigh less than 16 ounces
- Minimum of 200 pieces or 50 pounds
- Standard Mail rates available for
 - Letters
 - Lettersize Booklets & Folded Self-Mailers
 - Flats
 - Some Parcels
 - Maximum weight and dimensions



Standard Mail a.k.a. Marketing Mail

- Known to many as Bulk Rate, or the “J” word
- Examples of mail that qualifies
 - Printed Matter that is not of a personal nature
 - Circulars, Flyers, Catalogs, Booklets, Solicitations, & some Personalized Computer-Prepared Materials
 - Lightweight merchandise
 - Plants, Seeds or Bulbs, Product Samples
- No service guarantee
 - Heinrich’s Law – “The Big 3”



Standard Mail a.k.a. Marketing Mail

- Undeliverable, unendorsed Standard Mail is treated as waste and recycled
- Flats weighing over 4 ounces are subject to a per piece + per pound charge
- Annual mailing fee must be paid at all offices where mail is entered
 - There are a couple of exceptions to this
- Drop shipment discounts are available for transporting mail closer to its final destination
- Sub-class for nonprofit organizations





Nonprofit Standard Mail

- Only certain organizations are eligible.
 - Religious, Scientific, Educational, Charitable, Agricultural, Labor, Veterans, Fraternal and some Political Committees
- Authorization to mail at Nonprofit rates must be approved by the USPS
- Nonprofit must be shown on every mailpiece
- Strict restrictions on advertising, personal content and co-op mailings
 - Travel, Insurance and Financial
 - Personalized vs. Individualized
- Publication 417 has all the regulations

Nonprofit Standard Mail

- It is not necessary for the Nonprofit to own their own permit
- The full name and address of the authorized nonprofit must appear on every mailpiece
 - USPS approved alias are acceptable
 - ASPCA - American Society for the Prevention of Cruelty to Animals
 - MADD – Mothers against Drunk Driving
 - YMCA – Young Men’s Christian Association
- When the mail has a return address, it must be the return address of the authorized Nonprofit at a location where they conduct business daily

Nonprofit Standard Mail

Now Open in Kulpville

Services and hours can happen at any time and with Great View Urgent Care now open just minutes from your home. It's convenient, more convenient to take care of your family's medical care needs.

Located at the corner of Hwy 100 Road and Sunnydown Avenue, the new location of Great View Urgent Care is a convenient place to go when you are unable to see your doctor right away or if your doctor's office is closed for non-emergency issues, such as:

- Common illnesses and injuries
- Coughs, colds, flu
- Sprains and strains

Additional Services

- On-site X-ray and lab
- Follow-up, walk-in, same-day and drive-through
- Vaccinations
- Cancer care

Benefits

- Staffed by board-certified physicians
- Lower patient co-pay compared to emergency room visits
- Major insurance plans accepted
- Online scheduling to minimize wait time
- Make the appointment the appointment necessary

gventurgentcare.com

Non-Profit Hospital
1715 Limestone Rd
Lancaster, PA 17602

For-Profit Urgent Care
Return Address
201 OLD CHURCH RD
NORTH WALES, PA 19454-2019



Nonprofit Standard Mail

- Itemized statements of the amounts of previous pledges or donations can qualify as non-profit or regular standard mail if they are computer prepared and associated with a solicitation for future donations or promotions, and the personal information is only included to support the solicitation or promotion.
- Acceptable Solicitations
 - Your continued support is appreciated
 - Please keep your pledge current
- Non-Acceptable Solicitations
 - This is not a bill
 - Thank you for your support
 - Contributions are tax deductible



Periodicals

- Special rates for newspapers and magazines that publish at least 4 times a year
- Publication must meet specific eligibility standards and get approval from USPS to mail at Periodical rates
- No service guarantee, but receives expeditious processing, transportation and delivery
- Very complex rules, regulations and rates



Package Services
Thank You, Amazon?





Package Services

- Consists of parcel size pieces containing merchandise, printed matter and other articles
- Available as Retail or Commercial Pricing
- Retail First-Class parcels are now known as Ground Advantage
 - Both Retail and Commercial Pricing
- Commercial Pricing has four additional categories with different restrictions on size & weight, each with their own regulations and rates
 - Bound Printed Matter - Media Mail
 - Parcel Select - Library Mail

Ground Advantage™

- New service combining 3 former package services types
 - Retail Ground, First Class Package Service and Parcel Select Ground.
- Delivery in 2 to 5 working days
- Retail and Commercial rates available
- Can now ship packages up to 70 Pounds
- Rates based on weight and zone charges
- \$100 insurance included at no charge
- Non-standard length fees apply

Parcel Select

- A method to mail larger quantities of parcels via ground service
- Minimum number of parcels – 50
 - When paid by permit imprint or meter strip
 - No minimum quantity when postage is paid using an on-line method
- Must be entered at a destination facility
 - DHUB, DSCF or DDU
- Rates are based on both weight, distance and whether the piece is machinable or not



Bound Printed Matter (BPM)

- BPM is basically Standard mail that weighs over a pound
- BPM rates available for both Flats and Parcels
- Weight cannot exceed 15 pounds
- 90% of total weight must be printed materials
 - Advertising, promotional, directory or editorial content
- 75% of total weight must be securely fastened by some type of permanent binding



Bound Printed Matter

- Blank pads and printed forms do not qualify
- Different rates for flats and parcels
- Both have presorted and non-presorted rates
- Presorted rates are based on piece+pound and must have a minimum of 300 pieces
- No minimum quantity for non-presorted BPM
- Destination entry discounts are available
- Postage must be paid by permit imprint
 - Form 3605-R must accompany mail



Media Mail

- Specific eligibility & content standards
 - Books of 8 pages or more with no advertising
 - 16mm or smaller film, slides, transparencies
 - Printed music and test materials
 - Video and sound recordings
 - Playscripts and manuscripts
 - Printed educational reference charts
 - Medical loose-leaf pages and binders
 - Computer readable media
 - Video games, computer and flash drives are not eligible
- Rates are based on weight only and presorted rates are no longer available





Library Mail

- Basically, it’s Media Mail with specific eligibility requirements
 - *Is mailed, to or from educational facilities, public libraries, museums, herbariums and specific nonprofit organizations*
 - *Any of the above can have no financial interest in the sale, promotion, and distribution of the materials, unless they have placed an order to buy such materials for delivery to themselves*
- Rates are based on weight only and presorted rates are no longer available



Welcome to

MAILER’S
BOOTCAMP
Day 2



Mailers Hub
*Bringing Commercial Mailing,
Resources, and Solutions Together*

Shape Based Processing

Yes, Size does Matter



Letters



Flats



Parcels





Yes, Size Does Matter

- It’s important to understand how size impacts postage costs
- The premise is really simple, the larger the piece the higher the postage
- Postage costs are broken into many categories, but the basics are letters, flats and parcels
- Postal regulations determine into which category a mailpiece will fall



How the USPS Processes Mail

- USPS process mail using three basic methods
 - Manual – employee reads address and hand sorts into pigeon holes
 - around 1,000 per hour
 - Mechanical – employee reads address and keys information into machine that sorts the mail
 - around 4,000 per hour
 - Automated – employees feed and empty the machines and the machines do the rest of the work based on the address and/or the barcode
 - Different speeds based on the size of the mailpiece



How the USPS Processes Mail

- How fast are these machines?
 - Letters – 36,000+ per hour – 2 people
 - Flats – 12,000 per hour – 3 to 4 people
 - Parcels – 6,000 per hour – 10 to 15 people
- Automated vs. Automation
 - Automated means processing is done on a machine
 - Most times called machinable
 - Automation means a specific postage rate on machinable mail which has a barcode pre-applied by the mailer





Machinable Letters

- USPS prefers a barcode on every piece of lettersize mail
 - Currently 97%
- MLOCR–Multi Line Optical Character Reader
 - reads address, calculates ZIP+4 & delivery point and sprays on barcode and sorts to destination (intermediate or final)
 - 98% of handwritten addresses can be read
- DBCS – Delivery BarCode Sorter
 - reads only the barcode and sorts to destination

Machinable Flats

- AFSM 100
 - Automated feeding system
 - Can only sort to a 5-digit destination
 - Has online video encoding system
 - 17,000 flats per hour
- Flat Sequencing System – FSS
 - machines capable of sorting flats to carrier delivery sequence
 - 24,000 flats per hour
- These machines are equipped with OCR and barcode readers to expedite sorting

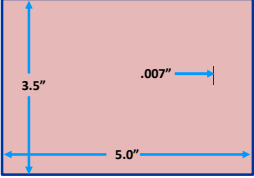
Machinable Parcels

- Most parcel sorters have barcode reading capability
- Small Parcel & Bundle Sorter (SBPS)
 - Operator keys in ZIP code and sorts to destination (final or intermediate)
 - Used for parcels and small bundles of mail
- Automated Package Processing System (APPS)
 - Has OCR and Barcode reading capabilities
- High Output Package Sorter (HOPS)



Mailability

- Pieces not meeting minimum criteria or exceeding maximums are **NON-MAILABLE**
- All mail pieces less than 1/4" inch thick must be
 - Rectangular in shape
 - 3.5" High
 - 5" Long
 - .007" thick



Length is always parallel to the address (lettersize only)

Mailability

- Rectangular in shape means the opposite sides are equal in length and meet at right angles
 - Square mailpieces are acceptable but may be subject to a surcharge
 - 1/8" radius rounded corners allowed on cards
- Die-cut and odd shaped pieces can only be mailed as Customized Marketing Mail



Customized Market Mail

- Odd Shaped Mail sent Standard rates
- **Must be delivered to destination Post Office**
 - 223 Post Offices in Minneapolis metro area
 - 809 Post Offices in Minnesota
- Uses a special permit and markings
- Not usually cost effective unless being mailed locally
- Totally manual process through the USPS
 - Quick Service Guide - Section 705a



Mailability Oop\$

This piece is a 6" x 11" card and is non-mailable.
Can you tell why?

Lettersize mail pieces must be rectangular in shape, however cards can have rounded corners with a radius of no more than 1/8"

One Newer Regulation

- Trailing Edge Die-Cut
– *a.k.a. as TED-C*
- Allows die-cuts on trailing edge of lettersize machinable envelopes and cards

Pay Off Your Debt

You're Pre-Approved for up to \$50,000

TED-C

- Mailpiece must maintain four 90° corners
 - Maximum size 6 1/8" x 10 1/2" including die-cut
 - Maximum Weight – 2.5 ounces
 - Minimum of 5/16" above and below die-cut

Pay Off Your Debt

You're Pre-Approved for up to \$50,000



TED-C

- Pieces must be part of Full-Service mailing
- Barcode must be in address block
- Not eligible for
 - Full Rate First-Class Mail
 - Postcard pricing
 - Folded self-mailers, booklets or flats
 - Pieces using Secure Destruction
- Pieces not meeting TED-C requirements will be charged Nonmachinable letter prices

https://postalpro.usps.com/alternative_designs/ted_c_process

Lettersize – General Rules

- Lettersize has 3 distinct size categories
 - Postcards
 - Envelopes & Larger Cards
 - Booklets and Folded Self-Mailers
- Most regulations because of speed of processing
 - 36,000 pieces per hour – 10 pieces per second
- Length is always the side parallel to the address
- Maximum Weight – 3.5 Ounces
- Aspect Ratio – 1.3 to 2.5
 - Divide the length of the piece by height

Lettersize - First-Class Postcards

- Postcards are still considered lettersize pieces
- They do have special rates and regulations for cards mailed at First-Class rates ONLY
- Minimum Size
 - 3 ½" x 5" x .007
- Maximum Size
 - Retail
 - 4 1/4" x 6" x .016"
 - Presorted
 - 6" x 9" x .016"
- Need 3 ½" from right edge for the barcode

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Okay, so I found out last week about this British business company. I told you about last week. Remember they're all about being so "time life oriented". They are help customers succeed in becoming a people important to them. Customer satisfaction - happy customers!	The Group Selling Family of Products Wholesale marketing method and helping you experience it all again!
At Prince-Bachman, there are all the new popular products from some beautifully decorated, furnished, bright and fresh to help you, and more and more!	PRINCE-BACHMAN 2510 West Valley Street Tampa, Florida 813-881-1111
The website has great tips you can learn with customer service - "second customer service" and "the first hand you want". I love it! You've got to visit it and see for yourself!	Wilma Flintstone 9876 Rubble Dr Bedrock BC 00001-0001
2000-2001 2000-2001	2000-2001

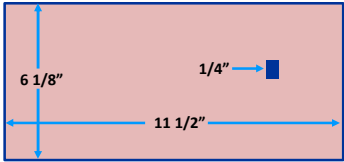
- Two attached cards with instructions to separate and return reply portion
- Qualifies for Postcard rate for outbound mailing
- Card must be folded to hide reply address
- The card must be tabbed or glued shut when mailing at automation rates





Lettersize – Envelopes and Larger Cards

- **Minimum Size**
– 3 ½” high x 5” long x .009” thick
- **Maximum Size**
ENVELOPES & CARDS ONLY
 - 6 1/8” High
 - 11 ½” Long
 - 1/4” Thick



- Cards can have 1/8” rounded corners

Lettersize Template – Notice 3A

LETTER - SIZE MAIL DIMENSIONAL STANDARDS TEMPLATE

UNITED STATES POSTAL SERVICE

Use this template to check:

- General Mailpiece: minimum required dimensions
- Postcard Rate: maximum dimensions
- Letters: maximum dimensions
- Machineability: Size restrictions for First-Class Mail 1 ounce or less, Standard Mail 3.5 ounces or less

Maximum postcard dimensions: 4-1/4" high, 6" long, .016" thick

Minimum machineable dimensions for pieces 1/4" thick or less: 3-1/2" high, 4" long, .009" thick

To use this template, place lower-left corner of mailpiece here. See examples on reverse.

Aspect Ratio

Machineable Sizes: To meet machineability requirements, the tip of the upper-right corner of the mailpiece must touch this shaded area and meet the thickness standards above for maximum Machineability by passing the piece through the slot below. Mailpieces more than 4-1/4" high or 6" long must be at least .009" thick to be machineable.

To measure smaller thicknesses noted on this template, use a micrometer or consult a postal envelope design analyst.

First-Class Mail 1 ounce or less and Standard Mail 3.5 ounces or less (other than Enhanced Carrier Route pieces) that are within the dimensions on this template, but not within the machineable aspect ratio, will incur a nonmachinable surcharge. Aspect ratio (length divided by height) must be at least 1.3 but no more than 2.5.

First-Class Mail 1 ounce or less exceeding any letter-size maximum dimension will incur a nonmachinable surcharge. Standard Mail 3.5 ounces or less exceeding any letter-size maximum dimension will incur postage at the nonletter rate.

Notice 3-A, December 2009
PSN 7410-100-9093

Lettersize – Aspect Ratio

LETTER - SIZE MAIL DIMENSIONAL STANDARDS TEMPLATE

UNITED STATES POSTAL SERVICE

Use this template to check:

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Notice 3-A, December 2009
PSN 7410-100-9093

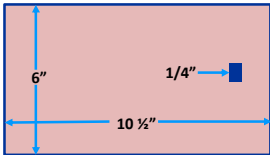
• Because this piece failed the aspect ratio it could only mail at non-machinable rates

Today the postage would be between 49.7¢ to 78.7¢ more per piece



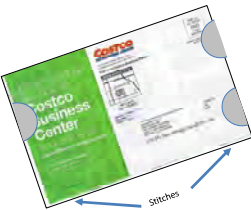
Lettersize – Booklets & Folded Self-Mailers

- **Minimum Size**
– 3 ½" high x 5" long x .009" thick
- **Maximum Size**
BOOKLETS & SELF-MAILERS ONLY
 - 6" High
 - 10 ½" Long
 - ¼" Thick



Lettersize – Booklets

- **What is a Lettersize Booklet?**
 - Multiple pages held together by some type of permanent fastening
 - Stitches, Staples, Glue
- Bound edge must be on bottom or right
- Must be tabbed shut to be mailed



Lettersize – Folded Self-Mailers

- **What is a Self-Mailer?**
 - One or more sheets of paper folded together to make a finished mailer
 - Multiple sheets can not be bound together
- Final fold must be on bottom or right
- Must be tabbed or glued shut to be mailed





Lettersize – Non-Mailable

- Why is this piece non-mailable?
- Improper placement of the address can result in a mailpiece failing to meet minimum size requirements and it will become non-mailable
- Reminder, the length of a lettersize piece is always parallel to the direction of the address



Lettersize – Now Mailable



Flats

- Large envelopes and magazines are called **Flats**
- When a piece exceeds one or more of the maximum dimensions or weight of a letter it becomes a flat
 - Unless it exceeds the maximums for flats
- Minimum Size
 - Without Barcode - 6" high x 10½" long x .009" thick
 - With Barcode - 5" high x 6" long x .009" thick
- Maximum Size –
 - 12" high x 15" long x 3/4" thick
- The longest dimension is always the length & the shortest dimension is considered the top



Flats

Minimum

.009"

10½"

6"

Maximum

3/4"

15"

12"

Flats - Flexibility

FLEX TEST

Length must be parallel to surface

For flats, length is the longest dimension.

For flats, length is the longest dimension.

Inserts must be flexible enough to bend 1" parallel to the longest dimension.

FLEX TEST

Length must be parallel to surface

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Flats - Flexibility

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FLEX TEST

Length must be parallel to surface

For flats, length is the longest dimension.

For flats, length is the longest dimension.

Inserts must be flexible enough to bend 1" parallel to the longest dimension.

- Flats that have rigid inserts must also pass the following flexibility tests
- 10" long or less – must flex at least 1"
- Over 10" long – must flex at least 2"

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Flats - Rigidity

- Flats must also be rigid enough to process through automated equipment
 - Sometimes called the “Droop test”
 - Pieces 10” or shorter – Maximum droop 2”
 - Pieces longer than 10” – Maximum droop 3”

The diagram shows two scenarios for the droop test. In the first, a flat piece is held vertically, and the droop is measured. In the second, a flat piece is held horizontally, and the droop is measured. Labels indicate that the flat size is the longest dimension and that the droop test is used to determine if the flat is rigid enough for automated processing.

Flats – Uniform Thickness

- Flats must also maintain something called Uniform Thickness
- There can be no more than ¼” difference between the thinnest and thickest part of a flat
- You do not measure the outside 1” perimeter when determining uniform thickness

The image shows several flat pieces of mail, including envelopes and cards, stacked together. This illustrates the concept of uniform thickness, which is a requirement for flats to be processed through automated equipment.

Flats – More Stuff

- Flats can be wrapped in plastic as long as the material is approved by the USPS
 - Here the link to find the suppliers
 - <https://postalpro.usps.com/polymanufacturerslist>
- Flats do not have an aspect ratio
- Flats do not have to be tabbed
- Strict addressing guidelines for flats mailed at Standard/Marketing Mail, Bound Printed Matter or Periodical rates
 - These will be covered in the module on addressing



What is a Fletter?

- Any mailpiece which physically meets lettersize specifications but could be considered flat size due to address orientation
- Fletters can usually be mailed as a non-machinable letter or automation flat
- Changing the orientation of the address can save up to 90% or more in postage costs



Fletter Example

This piece as shown is lettersize

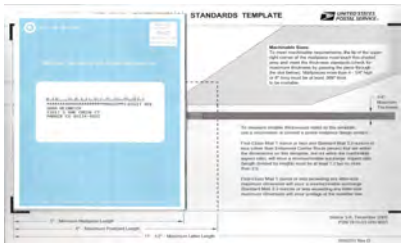
- 6 ½” long
- 5” high



Fletter Example

Now the piece is a flat because of address orientation

- 5” long
- 6 ½” high*
- *exceeds maximum



Today the postage would be between 39.8¢ to 75.2¢ more per piece





Parcels/Packages

- Mailpieces that do not qualify as letters or flats are considered Parcels
- Three different parcels categories based on their physical properties
 - *Machinable*
 - *Non-machinable*
 - *Irregular*
- No parcel can weigh more than 70 pounds
- The longest dimension is always the length



Machinable Parcels

- Parcels that can be processed on automated sorting equipment
- Minimum Size
 - 3" x 6" x 1/4" x 6 ounces
 - About the size of a pack of checks
- Maximum Size
 - 22" x 18" x 15" x 25 pounds
- Must be sealed with material that adheres to the surface of the parcel



Non-Machinable Parcels

- Mailpieces that cannot be processed in mail sacks due to size, shape, weight, density, container or nature of contents
- A carton containing more than 24 oz of liquid in glass containers
- 1 gallon or more of liquid in metal or plastic containers
- Roll or tube longer than 26 inches
- Unpackaged items including tires, exhaust pipes, trailer hitches and hula hoops
- Can (paint, etc.)
- Metal or wood boxes
- A high-density parcel weighing more than 15 pounds and exerting more than 60 pounds pressure per square foot pressure on its smallest side
- Parcels packaged in material that will not allow it to slide on parcel sorter chutes





Irregular Parcels

- Just about any parcel that’s not machinable or non-machinable
- Characteristics
 - less than 6” long ,
 - less than 3” high,
 - less than 1/4” thick
 - less than 6 ounces
 - *Rolls and tubes up to 26” long*
 - *Merchandise samples not individually addressed*
 - *Envelopes not lettersize, flat size or machinable*



Parcel Surcharges

- Balloon Rate
 - Weighs less than 20 pounds & measures more than 84 inches in length and girth, pays 20-pound rate
- Oversize Rate
 - Parcels over 108 inches length & girth
- Length Surcharges
 - Parcels between 23” to 30” long - \$4.00 each
 - Parcels over 30” long - \$8.40 each
- Dimensional Rates
 - For pieces over 1 cubic foot
 - Pay for size or weight, whichever is greater
- IMpb noncompliance fee of 25¢



Quality Addressing

What’s All This Fuss
About Addresses





Addressing Basics

- The purpose of the address is to specify the delivery location of the mailpiece
- It makes no sense to mail to an address that the USPS says is undeliverable
- This also gives you an opportunity to offer list updating (cleanup) services to your clients
- Various methods on how to do this will be discussed in this section



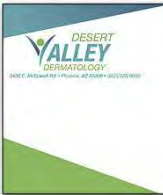
Addressing Basics

- Most mail must bear a complete delivery address
 - Name of recipient
 - Street number and name, or PO Box
 - City, State and ZIP+4
- Discounted mail requires that the addresses be updated within 95 days prior to mailing
 - Move Update Regulation



Addressing Basics

- Whether on a machine or by a person the USPS reads the address from the bottom to the top



DESERT VALLEY
DERMATOLOGY
10000 N. 10th Avenue, Suite 100, Phoenix, AZ 85020-1000

This information should be left justified

Non-address data/Endorsement Line
Information or Attention Line
Name of Recipient or Company
Delivery Address Line
City, State & ZIP





Address Abbreviations

- The USPS has no control over addresses or street names
- Street names should be spelled out
 - If abbreviated use only USPS approved street abbreviations
- Directionals and street suffixes should always be standard abbreviations
- Complete listing in Pub 28
 - <http://pe.usps.gov/cpim/ftp/pubs/Pub28/pub28.pdf>
- CASS software will perform this function



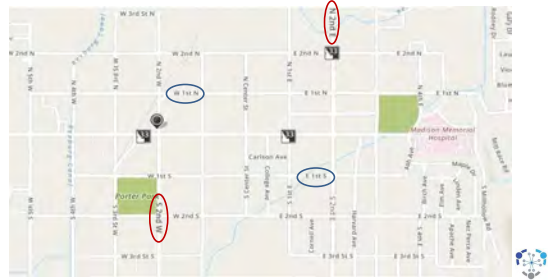
Address Directionals

- Directionals should always be abbreviated
- Eight approved Directionals
 - N S E W NE NW SE SW
- Pre and Post Directionals
 - E Main St Main St SW
- Both Directionals
 - E Main St W
- Directionals as part of street names
 - 1234 E West Ct
- 753 East “E” Street
 - 753 E E ST



Address Directionals

Rexburg ID 83440





Secondary Addresses

- Addresses to multi unit buildings should have the unit designator as part of the delivery address line
 - If on a separate line it should be above the delivery address
- Avoid using the octothorpe sign (#)
- If the # sign is used, remember to leave a space between the # and the number
- Use the proper unit abbreviations
 - Publication 28



Post Office Box Addresses

- The proper prefix for Post Office Boxes is PO Box followed by the number
- Should not use a street address and PO Box in the same address block
- The mail will be delivered to the address directly above the City, State and ZIP+4
- ZIP+4 and barcode may not match delivery address and delay the mail
- Recommend using PO Box as primary address



Foreign Addresses

- The bottom line of a foreign address is reserved for the country - IN ALL CAPS
King Charles III & What’s Her Name
117 Buckingham Palace Dr
London W1P 7HQ
ENGLAND
- Country names should be standardized
- Foreign mail should be sorted by country before presentation to the USPS
- Clients should have country name and postal codes in a separate fields in their data





Exception Addresses

- Adds “or Current Resident” to assure deliverability of the mail to the address, not the name shown
- Not allowed on
 - Priority Mail Express
 - Certified, Registered, Insured or COD mail
 - Mail with Ancillary Service Endorsements
 - Certain types of Periodicals
 - Mail addressed to Foreign Post Offices
- Meets Move Update requirements

Exception Addresses

- Used to selectively address mail without using the recipient’s name
- Occupant/Resident Address Format
 - Must contain the delivery address and City, State and ZIP+4
 - OK to use substitutions like “Pizza Lover” or “To Our Friends at” if not offensive
 - Customer Support Ruling – PS-048 May 2003

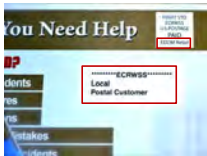
Simplified Addressing

- Used to selectively address mail without using a name or address
 - Postal Customer
 - Local
- One piece per mailbox
- Can be used on lettersize pieces **only** when being mailed to Rural Routes & PO Boxes
 - Governmental agencies can use this format when mailing to all types of routes
- Can be used on **ALL** flat size pieces
 - a. k. a. Every Door Direct Mail (EDDM)

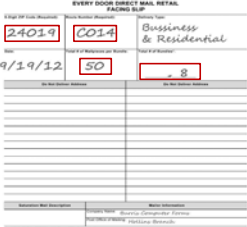


What is EDDM?

- EDDM is flat size pieces using simplified addresses
- Retail EDDM –
 - Maximum 5,000 pieces daily
 - Has unique wording in permit
- Larger volume EDDM can be entered through the BMEU, similar to a normal Standard mailing
- EDDM is very labor intensive



What is EDDM?



- Pieces must be bundled in 50's or 100's and have facing slips that show
 - ZIPcode & Route number
 - number of piece in the bundle
 - Bundle ____ of ____

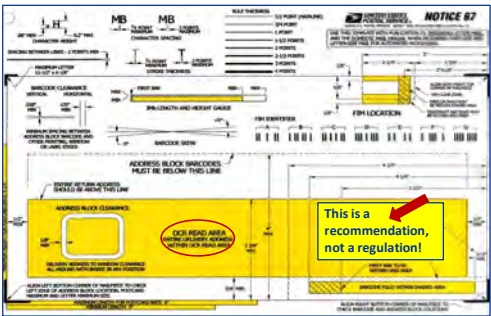
Addressing Lettersize Mail

- Address placement determines length & height of **lettersize piece only**
- The OCR read area for lettersize mail is an **imaginary** block reading 2 ¾" up from the bottom of the mailpiece and stopping ½" from each end
 - *Not a regulation, just recommendation*
- The read area also stops 5/8" above the bottom of the mailpiece





Lettersize Template – Notice 67



Lettersize Window Envelopes

- For lettersize window envelopes the window must be parallel to the longest edge.
- Address and barcode must be clearly read through window covering material
- The window must also be large enough to allow the address and barcode to show through all motion of the insert
 - *The Tap Test!*
 - Twice on the bottom
 - Twice on each end
 - On the top???

Failed Tap Test



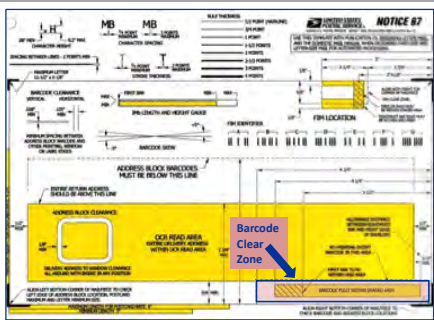


The Infamous Barcode Clear Zone

- The barcode clear zone is another imaginary box that is 5/8” high and 4 3/4” long in the lower right corner of any lettersize mailpiece
- Unless the piece is pre-barcoded, the USPS will use this area to print a barcode
- Try to keep this area clear of any printing on all lettersize mail
- Mailers can also put the barcode in this area
– *It must say AUTO somewhere on the piece*



Lettersize Template – Notice 67



Addressing Discounted Mail

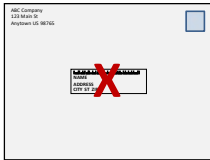
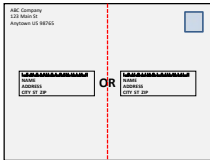
- There are additional rules for addressing discounted mail
- All pieces must have an addressee’s name unless using an occupant/resident format
- Return addresses are required on mail with
 - *Pre-cancelled Stamps*
 - *Company Permits*
 - *All Package Service mail*
- All pieces must have a valid ZIPcode that has been verified within 90 days of mailing
 - *CASS is the best way to do this*





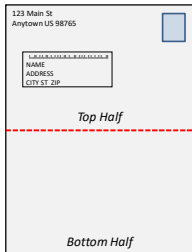
Addressing Discounted Flat Size Mail

- Flats completely enclosed in envelopes or polywrap with address parallel to LONGEST DIMENSION
- Address must be completely in left half or right half



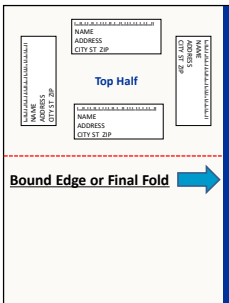
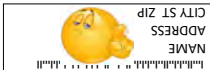
Addressing Discounted Flat Size Mail

- Flats completely enclosed in envelopes or polywrap with address parallel to SHORT DIMENSION
- Address must be in top half of the flat
- Address **CANNOT** read upside down



Addressing Discounted Flat Size Mail

- For **UNWRAPPED** flats with bound or final folded edge on **RIGHT**
- The address **MUST** be in top half of the flat
- When address is parallel to the short dimension it **CANNOT** read upside down





Addressing Discounted Flat Size Mail

Front Cover

Back Cover

Bound Edge

Bound Edge

What the heck is CASS?

- CASS - Coding Accuracy Support Software is the test the software must pass that measures the quality of the address matching process
- CASS approved software will update the data with the USPS preferred address, city, state, ZIPcode and carrier route information
 - Additional information can also be added
 - Latitude, Longitude, County, etc.
- This process must be done within 90 days prior to mailing to qualify for most discounted rates

How CASS Works



How CASS Works



In 1999 – Tracy CA = 95376 PO Boxes = 95378
Today – 95304, 95376, 95377, 95391 & 95378

How CASS Works



CASS software looks at addresses like this..
Tracy CA 95376
RENOWN DR
(EVEN between 1400-1498)
TRACY CA 95376-4454

How Delivery Point Verification Works



DPV software looks at addresses like this..
Tracy CA 95376
RENOWN DR (EVEN between 1400-1498)
TRACY CA 95376-XXXX
Is 1466 A VALID ADDRESS?
NO!!



Undeliverable as Addressed (UAA)

- Delivering mail with an undeliverable address makes no sense
- It’s a waste of Printing & Postage!!
- If your client loses contact with their customer what is the cost for the client
 - A recent survey with one company determined that the annual value of their customer is \$2500
- There are many things you can offer your clients to help clean up their mailing list



DPV Failures

- If only a few, you can try to correct them
 - Misspellings, transposed numbers, missing suite numbers or directionals, etc.
- If many, inform the client and let them know that those pieces are undeliverable
- Do you mail to these addresses?
 - The USPS says they are undeliverable
 - It’s really your customer’s decision, since they are paying the postage
 - You have an obligation to let them know



Undeliverable as Addressed (UAA)

- The Postal Service processes over 4 billion undeliverable pieces every year
- About 28.3 million people change their address IN 2023
 - That’s about 54 changes per minute 24/7/365
- Mail can be considered undeliverable for many different reasons
 - Incomplete or inaccurate addresses
 - Addressee moved and didn’t notify the USPS
 - Forwarding order expired
 - Address is vacant





Undeliverable as Addressed (UAA)

- What happens to this mail is a very complex process based on the class of mail and endorsements printed on the piece
- First-Class Mail
 - *forwarded or returned free of charge*
- Standard Mail
 - *recycled unless instructions are provided on what to do with the undeliverable mail*
- Periodical Mail
 - *forwarded free of charge for sixty days*



Move Update Regulation

- The Postal Service spends about 2 billion dollars a year to process UAA mail
- Move Update rules were established in 2008, because of a mandate by the PMG to reduce UAA mail by 50% by 2010,
 - *Currently about 20%*
- Addresses used on discounted mail must be updated within 95 days prior to mailing.
 - *NCOA^{link}*
 - *Address Change Service (ACS)*
 - *Ancillary Service Endorsements*
 - *Alternate Methods – First-Class Only*



Move Update Compliance

- **Alternate Methods – First-Class only**
- **99% Accurate**
 - *Lists are verified for accuracy by the USPS*
 - *If they pass the list owner is given a year authorization*
- **Legal Restraint**
 - *Must be apply for USPS authorization to mail using this method*
 - *Four steps to gain authorization*
 - *Lists must still be processed through some type of Move Update approved method*





Move Update Compliance

- **National Change of Address (NCOA)**
 - Database of address changes provided to the USPS by anyone who has moved
 - About 30 million changes annually
 - 20% of people who move will never tell the USPS
 - Licensees compare client data against NCOA^{link™} database and identify moves
 - Date of move
 - Type of move
 - Family, Individual & Business
 - Reason for non-match
 - Retention of old address?

Move Update Compliance

- **Address Change Service (ACS)**
 - Automated COA or UAA updates from the USPS
 - COA or UAA information provided after mail has been processed by the USPS
 - Four distinct methods of participation
 - Traditional ACS
 - OneCode ACS
 - Full Service ACS
 - IMpb ACS
 - Fees are based on which method is used and how COA or UAA information is returned
 - Full-Service ACS is free!

Move Update Compliance

- **One Code ACS**
 - Provides COA or UAA data in a similar method to Traditional ACS
 - Instead of Participant Code and Keyline printed on piece, STID in the IMb identifies participation
 - The MID identifies who receives the COA or UAA data
 - The IMb serial number can be used to identify an individual address record
 - Correct STID's & MID's are very important
 - Standard Mail must use an Ancillary Service Endorsement



Move Update Compliance

- **Full-Service ACS**
 - Same service as OneCode ACS but without any fees
 - A correct STID must be used to identify the mail as Full-Service IMB
 - COA or UAA data is available through the Business Customer Gateway
- **IMpb ACS**
 - Allows Parcel mailers to receive automated COA or UAA information
 - May require unique MID for each client

Move Update Compliance

- **Ancillary Service Endorsements**
- Seems like a simple solution, but...
 - Strict guidelines to maintain compliance
 - Different fees based on ASE used and class of outbound mail
- Does not comply with Move Update regulations the first time used
- Changes must be
 - Made within 95 days of next use
 - Proof of updating retained for one year

Ancillary Service Endorsements

- Same side as delivery address
- Black ink on a white background is preferred
- 8 pt type with ¼” clear space on all sides
- Brilliant colors or reversed print is not permitted
- If not correct USPS may reject the mail
- Can not be used on pieces with “or Current Resident” addresses
- 4 specific locations – **DMM 102.4.3**

- **Locations**

ADDRESS SERVICE REQUESTED?

ADDRESS SERVICE REQUESTED?

Presorted
First-Class Mail
U.S. Postage Paid
Fort Worth TX
Permit No. 1

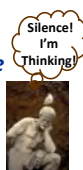
ADDRESS SERVICE REQUESTED?

ADDRESS SERVICE REQUESTED?

JOHN DOE
10 ELM ST
ANYTOWN WA 98765-4321



- Address Service Requested
- Change Service Requested
- Electronic Service Requested
- Forwarding Service Requested
 - *Does not meet Move Update Compliance*
- Return Service Requested
- Temp-Return Service Requested
 - *First-Class mail only*
- All the gory details in **DMM 507.1.5**



- Use of wrong ancillary endorsement line
 - University sent out course catalog weighing over 9 ounces with [Address Service Requested](#)
 - Used a list not updated in 3 years
 - Mailed out 80,000 catalogs
 - 4,000 catalogs returned with address changes over one year old, resulting in weighted fee
 - Cost of returned pieces
 - Address Service Requested – ~~\$10.26 each~~-\$41,040.00
 - Return Service Requested – ~~\$4.14 each~~ - \$16,560.00
 - Change Service Requested – ~~93¢ each~~ - \$3,720.00





How does the USPS know?

- Addresses on Full-Service mail are checked when processed through sorting equipment to see if there is a COA on file
- USPS compares the total number of addresses not updated in a calendar month against the total mailed by a Mailing Service Provider
- If this number exceeds .5% the MSP will be penalized 8¢ per piece exceeding the tolerance
 - Example, total pieces mailed in month - 1,000,000
 - COA's not updated 9,000 = .9% - .5% = .4%
 - Penalty - .4% of 1,000,000 = 4,000 x 8¢ = \$320.00



Return Addresses

- Used when return of mailpiece is required for any reason
- Elements are basically same as the delivery address
- Should be located in the upper left corner and parallel to the delivery address
- Required on specific types of mail
 - Mail with Precanceled Stamps
 - Mail with Company Permit
 - Mail with Ancillary Service Endorsement
 - All Priority and Package Services Mail



Return Addresses

- Should always be above and to the left of the delivery address
- On the back of the piece is not recommended
- Maximum size
 - 1/2 the length and 1/3 the height
- Should be at least 2 3/4" above bottom edge of the mailpiece
- Pieces with multiple return addresses from different cities are not mailable



[illegible]

Bringing Commercial Mailing,
Resources, and Solutions Together

USPS Barcodes



Why Barcode the Mail

- To improve processing and delivery time
- The client wants you to track the mail
- If you don’t, the USPS will
- The barcode looks really cool
- **To Save Postage!!!**
 - About 1 ½¢ per piece for First-Class
 - About ½¢ per piece for Marketing Mail
- *Barcoded mail must be machinable to earn automation rates*



USPS Barcodes

- The Postal Service has spent billions of dollars on automated equipment to assist with the processing of mail
- Mail without a barcode and sorted by hand costs 11 times more to process than mail with a barcode
- Currently 97% of lettersize and 93% of all flat size mail has a barcode printed on it
- About 70% of barcodes are applied before the Postal Service gets the mail



USPS Barcodes – A History

- The First Barcode
 - One BC
- 1982-1991
 - The 5-digit Barcode
- 1991-1996
 - The POSTNET Barcode



[illegible][illegible][illegible]



How the IMb Works

- An algorithm in the software will convert the numerical data to the string of alpha characters to print the barcode

Less Than 10 Million Pieces Annually

Barcode ID 2 Digits	Service Type 3 Digits	Mailer ID 9 Digits Low Volume	Serial Number 6 Digits Low Volume	Routing Code Delivery Information 0, 5, 9, 11 Digits
00	271	911801342	987654	80134483217

Over 10 Million Pieces Annually

Barcode ID 2 Digits	Service Type 3 Digits	Mailer ID 6 Digits High Volume	Serial Number 9 Digits High Volume	Routing Code Delivery Information 0, 5, 9, 11 Digits
00	271	123456	987654321	80134483217



More on how the IMb Works

- The IMB has two main components
 - Tracking & Identification – 20 digits
 - Routing (delivery) – 11 digits
- Mailer can assign a unique serial number to each individual mailpiece
 - Mandatory when mailing Full Service IMb
- When mailing Full Service IMb or using certain services, a combination of Service Type (STID), Mailer ID (MID) and Serial Numbers can not be repeated within a 45 days



Full-Service IMb

- The Postal Service has created Full Service IMb to simplify the acceptance process
- You must apply a barcode with a unique serial number to each piece, tray and pallet flag
- All documentation must be submitted electronically through PostalOne!
- Before you can qualify as a Full-Service mailer you must register with the USPS through the Business Customer Gateway
- Each barcode must have a unique serial number that cannot be repeated for at least 45 days after the mailing date





Full-Service IMb

- These barcodes all link together to help verify that mail is prepared properly and to assist with tracking and delivery
- Participation earns a postage discount of 1/2¢ per piece - \$5.00 per 1000
- You also get to participate in
 - *FREE Address Change Service (ACS)*
 - *Mail Anywhere* - which allows you to enter permitted mail at any location that has a BMEU
 - *eInduction* - which eliminates hard copy paperwork on drop shipments
 - *Informed Visibility* - which allows better tracking



Full-Service IMb

- Full Service requires IMb's that uniquely identify the sender, the mailpiece type, destination ZIP code and routing information
- The data in the eDoc links individual mailpieces to a tray and a tray to a container or pallet



Intelligent Mail® Barcode (IMb)



Intelligent Mail® Tray Barcode (IMtb)



Intelligent Mail® Container Barcode (IMcb)



Barcode Technical Requirements

- The difference in the amount of light reflected by the bars compared to the background paper is critical to the readability of the barcode
 - *Print Reflective Difference (PRD) of at least 30%*
 - *Print Contrast Ratio greater than 15%*
 - *Black bars on a white background is preferred*
- There are specific sizes and tolerances for postal barcodes
 - *height, width, pitch and spacing*
 - *No less than 20 bars per inch - < 3.25" long*
 - *No more than 24 bars per inch - > 2.71" long*
- *Over inking or voids can make the barcode unreadable*





Technical Requirements Continued

- Bar Tilt
 - *SKEW* is when the barcode is not parallel to the bottom of the mail piece
 - *ROTATION* is when the bars are not perpendicular to the baseline of the barcode
 - The maximum combined Skew and Rotation is $\pm 5^\circ$ ($\pm 10^\circ$ on flat size)
- The IMB is not human readable and will require a scanner to decode
- Apps are available for decoding using smart phones



- You don’t want your barcodes to look like this!



Parcel Barcodes

- USPS now requires IMpb on all parcels
 - GS1-128 is the primary font
- USPS TRACKING #

9402 8052 1368 3062 5229 20
- This label must include the digits represented in the barcode printed as human readable information
 - Parcels without barcodes are subject to a 25¢ surcharge





MID’s, STID’s CRID’s, eDocs, mail.dat, by/for & the Mailer’s Scorecard



**a.k.a. The USPS
is Watching You!**

e-Docs

- You will need software to produce the required e-docs (mail.dat) (mail.xml)
- This data must be accurate or the mail service provider will be subject to assessments
- The quality of the e-docs and the mailer’s preparation can be reviewed on the Mailer’s Scorecard
 - Accessible through the Business Customer Gateway

MID’s, STID’s and CRID’s

- **CRID** – Customer Reference Identification
 - An 8-digit number that identifies the physical location of a company doing business with the USPS
- **MID** – Mailer Identification
 - A 6 or 9 digit number that helps the USPS identify a mail owner, mail service provider or third party
- **STID** – Service Type Identifier
 - A 3-digit number encoded in the Intelligent Mail Barcode to identify class of mail and which services the USPS are to provide
 - Tracking or Address Change Services or more



By/For

- In the mail.dat file there is an important field called the By/For
- This identifies who the mailing was produced **BY** and who the mailing was **FOR**
 - The **BY** is always the company that submits the eDoc (mail.dat) file to the USPS (Mail Service Provider)
 - The **FOR** is always the company that benefits from the mailing (Mail Owner)
 - Not always the company who pays the postage
 - This can become confusing if there is third party involvement, like an ad agency
- These are both identified by their CRID’s



What is mail.dat

- How we communicate detailed information about a mailing to the USPS when submitting the mailing for acceptance
- Data set of several text files
 - Files are linked via key fields
 - Creates a database of detailed information about a specific mailing
- Output file is a result of the presort process
- Minimum of 10 data files
 - Could be as many as 21 based on the presort



What is mail.dat

Mail.dat® 22-1 Database Design Charts





The Mailer’s Scorecard

- The Mailer’s Scorecard provides a dashboard view summarizing the quality of the mail preparation by the Mail Service Provider
- Available to any company that submits electronic documentation
- The USPS is monitoring the quality and will make assessments for errors in preparation
- Drill-down reports provide a way to determine specific mail preparation errors

The Mailer’s Scorecard

- You access the Scorecard through the Business Customer Gateway – gateway.usps.com
 - Login
 - Click on Mailing Services
 - Click on Dashboard – Go to Service
 - Click on Mailing Reports (on left menu bar)
 - Click on Mailer’s Scorecard (in right column)
- Choose which scorecard you to use
 - eDoc submitter gives totals based on the Mail Service Provider’s CRID
 - Mail Owner, Mail Preparer gives a breakdown by Mail Owner’s CRID

The Mailer’s Scorecard

Mailer Scorecard

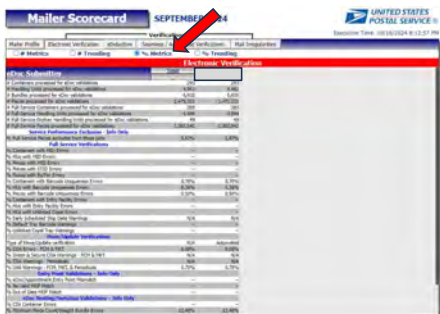
I’m an eDoc submitter

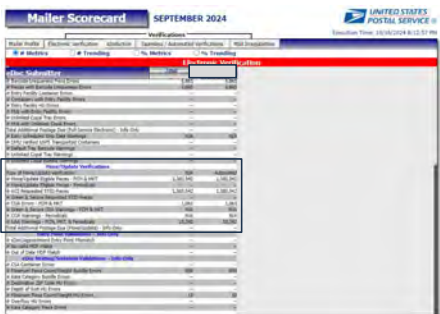
This report shows a breakdown of metrics by eDoc submitter CRID across several USPS programs, including Full-Service, Seamless Acceptance, and Introduction.

I’m a Mail Owner or Mail Preparer

This report shows a breakdown of metrics by mail owner and mail preparer across several USPS programs, including Full-Service and Introduction.

[illegible]







Seamless Acceptance (SA)

- Seamless Acceptance is designed to streamline and automate acceptance, verification, and postage payment of commercial mailings
 - The goal is to minimize human involvement
 - Participation earns a \$1.00 per 1000 pieces refund
- SA links the barcodes on the mailpieces, trays/tubs & pallets through the e-docs
- Mail is then verified as its processed through the USPS system
- Mail that doesn’t comply with postal regulations will be subject to assessments

Undocumented Mail

- Undocumented assessments only apply to mailers using Seamless Acceptance
- All Seamless Acceptance mail should have a link between the barcodes and the e-docs to prove that postage was paid, and mail was prepared properly
 - This applies to pieces, handling units & containers
- Any mail that cannot be linked is considered undocumented (unpaid) and subject to a penalty
 - Error threshold is .3%



Undocumented Mail		
154 % induction Undocumented errors	N/A	
155 Total Additional Postage Due (Induction) - Info Only	N/A	
156 # induction Undocumented Warnings	-	
157 % induction Undocumented Warnings	N/A	
158 # Seamless Status	0/0/0	
159 # Seamless Acceptance Jobs	115	
160 % Seamless Acceptance Jobs	96.64%	
161 # Containers processed for Seamless validations	178	
162 # Handling Units processed for Seamless validations	5,306	
163 # Pieces processed for Seamless validations	2,173,180	
164 % Volume Seamless Acceptance	100.00%	
165 Sampling Quality Score	N/A	
166 # Seamless Acceptance Jobs not Auto-Finalized	115	
167 % Seamless Acceptance Jobs not Auto-Finalized	100.00%	
168 # Seamless Documented Piece Scans	2,163,412	
169 # Adjusted Seamless Documented Piece Scans	2,101,476	
170 Piece Scan Rate	99.55%	
171 Adjusted Piece Scan Rate	99.56%	
172 # Scanned Pieces Associated to dDoc	2,163,406	
173 # Undocumented Pieces	308,777	
174 % Undocumented Pieces	12.45%	
175 # Nesting/ Sortation Piece Errors (MPE)	252	
176 % Nesting/ Sortation Piece Errors (MPE)	0.01%	
177 # Delivery Point Piece Errors	77	
178 % Delivery Point Piece Errors	0.00%	
179 Additional Postage Due (Undocumented Pieces) - Info Only	\$72,328.52	
180 Sortation Verifications		
Client: Mailer Scorecard Details Report		

Undocumented Mail		
Scan Facility	Mailer	# Undocumented
ALBANY		249,201
ALBANY		38,062
ALBANY		207
ALBANY		222
ALBANY		62
ALBANY		57
ALBANY		45
ALBANY		39
ALBANY		20
ALBANY		18
ALBANY		29
ALBANY		25

- Something was off, because my client was located in California
- We were able to prove that some other mailer had used my client's MID on the mail

Automation

Machinable & Automation Mail

What? People don't sort the mail?



What is Machinable Mail

- About 95% of all mail is processed on some type of machine
- Designing mailpieces that are compatible with these machines is important
- Postage on pieces not compatible could increase by over 200%
- There are different regulations for machinability based on the size of the piece
- Lettersize pieces have the most regulations due to the speed of processing



Lettersize Machinable Mail

- Lettersize machinable mail must...
 - Have the address parallel to the long dimension
 - Meet an aspect ratio between 1.3 and 2.5
 - Must be flexible enough to bend around an 11” drum
 - Be made of paper or USPS approved material
 - Not contain items that make the thickness uneven
 - Follow specific guidelines for Booklets and Folded Self Mailers (FSM)



Lettersize Machinable Mail

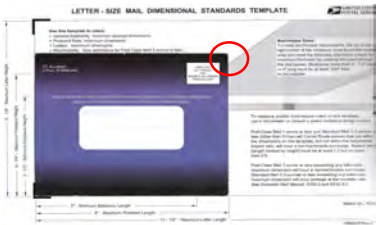
- Lettersize machinable mail must...
 - Meet minimum thickness - .009
 - except postcards < 4 ¼” x 6” - .007
 - Not exceed maximum weight of 3.5 ounces
 - Heavy Letter Mail – Over 3 ounces
 - Must be in envelopes with barcode in address block
- Most regulations due to speed of processing
 - 36,000 pieces per hour
 - That’s 10 pieces per second





Machinable Letters – Aspect Ratio

- Lettersize pieces must maintain the aspect ratio
 - $Length \div Height$
 - Between 1.3 to 2.5



Machinable Letters – Aspect Ratio



Machinable Letters – Paper Weight

- The weight of the paper can affect whether a piece qualifies for automation rates
- Self mailer paper weight is based upon the number of pages and folds
- Lettersize mailpieces that are not envelopes or cards must be sealed (tabbed) to facilitate processing
- Lettersize booklets & Folded Self-Mailers have different specifications for size, weight of paper and tabbing regulations



Machinable Letters

- Due to the speed of processing, the USPS has strict guidelines about the construction and paper weight of Folded Self-Mailers and Booklets
- The number tabs and their placement is affected by both the piece size, number of folds and paper stock weight
- Tabbing regulations are very confusing and misunderstood by both mailers and the acceptance clerks - @\$^*&%#!



Machinable Letters - Booklet Tabbing

▪ Slim Jims



Lettersize Booklet - Tabbing

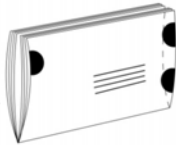
- Machinable lettersize booklets have different specifications than folded self-mailers
- **DMM 201.3.15**
 - A booklet is defined as a mailpiece with a bound edge. Sheets must be fastened with at least two staples in the manufacturing fold (saddle stitched), perfect bound, pressed-glued, or joined by another binding method that produces an end where pages are attached together
- Maximum weight 3 ounces





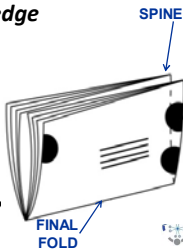
Lettersize Booklet - Tabbing

- Slim Jims and Typical Booklets
- Open on three edges, spine at bottom
 - Two 1 1/2" tabs on right (lead) edge
 - Lower tab 1/2" from bottom
 - Upper tab 1" from top
 - One 1 1/2" tab on trailing edge
- Cover stock
 - 50# or less - Max length 9"
 - 60# or more - Max length 10 1/2"



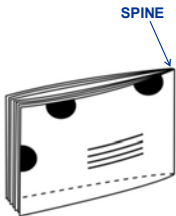
Lettersize Booklet - Tabbing

- Folded Booklets
- Piece has been folded after binding
 - Two 1 1/2" tabs on right (lead) edge
 - Lower tab 1/2" from bottom
 - Upper tab 1" from top
 - One 1 1/2" tab on trailing edge
- Vertical binding SHOULD be on right (lead) edge
- Cover stock
 - 40# + - Maximum length 10 1/2"



Lettersize Booklet - Tabbing

- Oblong Booklets
- Spine on shortest edge
 - Two 1 1/2" tabs on top
 - 1" from each end
 - One 1 1/2" tab on trailing edge
- Vertical binding MUST be on right (lead) edge
- Cover stock
 - 60# - Maximum length 9"
 - 70# + - Maximum length 10 1/2"





Lettersize Booklet - Tabbing

Paper Stock Weight Conversion Chart

Book Wt.	Bond Wt.	Cover Wt.	Newsprint Wt.
39	15	21	35
40	16	22	36
50	20	27	45
55	22	30	50
60	24	33	55
70	28	40	64
75	30	41	68
80	31	44	73
90	36	50	82
100	40	56	91
110	44	60	100
128	50	70	116



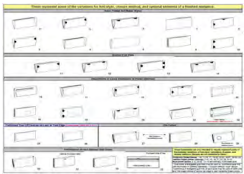
New Tabbing Regulations - 2013

- In 2009 the USPS introduced those tabbing regulations for lettersize booklets
- At the same time the USPS tried to apply these same regulations to folded self mailers
- The mailing industry raised such a stink that the USPS backed off and applied the changes to only the lettersize booklets
- After some analysis the USPS chose to conduct tests on various types of FSM’s



New Tabbing Regulations - 2013

- Over a half million pieces of different sizes and types of FSM’s were tested by the USPS over the next 18 months
- The test findings have resulted in these regulations





What is a Folded Self-Mailer (FSM)

- A folded self-mailer is formed of panels that are created when one or more unbound sheets are folded together and sealed to make a letter-size mailpiece
- If the piece has any type of binding it does not qualify as a Folded Self Mailer (FSM)
 - It becomes a letter-size booklet
 - Different tabbing/sealing regulations



Lettersize FSM Size Specifications

- Maximum Length – 10 ½”
- Maximum Height – 6”
- Maximum Weight – 3 ounces
- Thickness & Aspect Ratio remain the same
- Minimum Paper Weight –
 - 70# up to 1 ounce
 - 80# if over an ounce
- Newsprint can only be used in quarter folded designed pieces
- [These specs DO NOT apply to Envelopes or Cards](#)



Lettersize FSM Tabs Specifications

- Regulations effecting tabs
- **Tabs CANNOT have perforations**
 - Paper tabs (translucent) preferred
 - Plastic (clear) tabs OK, but not recommended
- Minimum of two tabs
 - Three tabs must be used is specific designs
- 1” tabs up to 1 ounce
- 1 ½” tabs if piece weighs over an ounce





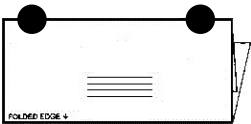
Lettersize FSM Glue Specifications

- Regulations effecting glue
- Continuous glue line
 - 1/8” wide to within 1/4” of edge of mailpiece
- Machine applied glue spots
 - 1/8” or 1/4” wide by 1/2” to 1” long
 - 3 or 4 based on mailpiece design
- Hand Applied glue spots or dots
 - Minimum 3/8” diameter
 - 3 or 4 based on mailpiece design



Lettersize FSM Addressing Guidelines

- Changes effecting address location
- Address **SHOULD NOT** be on the panel created by the final fold



– If address is on panel created by the final fold, a third tab or glue spot must be added near the bottom of the lead edge



A Panel Discussion

- What is a Panel?
- Each section of a folded piece creates a panel
- A sheet folded in half has 2 panels
- A sheet folded in thirds has 3 panels
- A sheet folded in half & half again has 4 panels
 - Second fold can be parallel or perpendicular
- For book type paper
 - Minimum – 2 panels Maximum – 12 panels
- For newsprint
 - Minimum – 8 panels Maximum – 24 panels





A Look At Panels

Two Panel

Four Panel Quarter fold

Three Panel

Four Panel Gate fold

Folded Self-Mailer Folding Guidelines

- Horizontal fold (parallel to address)
 - Final fold must be on bottom
 - No open edges on bottom of mailpiece
 - Short panels (flaps) must fold from top to back of piece
 - Z-fold (accordion) pieces are not allowed
- Vertical Fold (perpendicular to address)
 - Final fold must be on lead (right) edge
 - Short panels (flaps) must be final fold and fold from right around to back of piece

Flaps

- Flaps are short panels created by the final fold from the front to the back
- Flaps with horizontal folds must be
 - a minimum of 1 ½" long
 - end no closer than 1" from the bottom edge
- Flaps with vertical folds must be
 - a minimum of 5" long
 - end no closer than 1" from the trailing edge
- Flaps must be securely fastened to the back panel of the mailpiece



Basic Tab/Glue Locations

- Horizontal style folds
- Two tabs on top or ends
 - 1" tabs up to 1 ounce
 - 1½" tabs if over 1 ounce
- Flaps folding to the back must have two tabs or glueline

Basic Tab/Glue Locations

- Vertical style folds
- Two tabs - on top and/or trailing end
 - 1" tabs up to 1 ounce
 - 1½" tabs if over 1 ounce
- Flaps folding to the back must have two tabs or glueline

Basic Tab/Glue Locations – Quarter Fold

- Quarter folds are folded at least one time in both horizontal and vertical directions
- First fold **SHOULD** be on lead (right) edge and final fold on bottom
 - Two 1" tabs up to 1 ounce
 - Three 1½" tabs if over 1 ounce



Other Folded Self-Mailer Regulations

- There are also rules about
 - *Die-Cuts*
 - (201.3.14.6)
 - *Perforated Pull-Open Strips and Pop-Out Panes*
 - (201.3.14.7)
 - *Loose Enclosures*
 - (201.3.14.8)
 - *Attachments*
 - (201.3.14.9)
 - *Open Sleeve Style*
 - (201.3.15.1)



Decision Tree Matrix

Folded Self-Mailer Regulations - Decision Tree Matrix				
Regulation	Requirement	Exception	Permitted	Prohibited
201.3.14.6	Die-Cuts	Die-Cuts are not permitted on the front or back of a folded self-mailer.	Die-Cuts are permitted on the inside of a folded self-mailer.	Die-Cuts are not permitted on the inside of a folded self-mailer.
201.3.14.7	Perforated Pull-Open Strips and Pop-Out Panes	Perforated pull-open strips and pop-out panes are not permitted on the front or back of a folded self-mailer.	Perforated pull-open strips and pop-out panes are permitted on the inside of a folded self-mailer.	Perforated pull-open strips and pop-out panes are not permitted on the inside of a folded self-mailer.
201.3.14.8	Loose Enclosures	Loose enclosures are not permitted on the front or back of a folded self-mailer.	Loose enclosures are permitted on the inside of a folded self-mailer.	Loose enclosures are not permitted on the inside of a folded self-mailer.
201.3.14.9	Attachments	Attachments are not permitted on the front or back of a folded self-mailer.	Attachments are permitted on the inside of a folded self-mailer.	Attachments are not permitted on the inside of a folded self-mailer.
201.3.15.1	Open Sleeve Style	Open sleeve style is not permitted on the front or back of a folded self-mailer.	Open sleeve style is permitted on the inside of a folded self-mailer.	Open sleeve style is not permitted on the inside of a folded self-mailer.



Graphic Examples





Machinable Lettersize – The No No’s

- Certain items do not qualify to mail as machinable letters
- Made of, or enclosed in plastic
 - *Laminated cards are acceptable*
- Staples – allowed only on the bound edge of the mailpiece
- Non flexible items
 - *Pens, pencils, bottle caps, etc.*
- Items with protrusions
 - *clasps, string, buttons, wax, etc.*



Flat Size Machinable Mail

- Flat size machinable mail must...
 - *Be flexible enough to bend*
 - *Be rigid enough not to fold over on itself during processing*
 - *Be uniformly thick*
 - *Not have excessive selvage when wrapped in plastic material*
- Flats not meeting the above criteria will be considered parcels and postage will increase dramatically



Non-Automation Flats

- Should follow standards for automation flats
- **Minimum Size** – 6” x 10 ½” x .009”
- **Maximum Size** - 12” x 15” x ¾”
- Must meet flexibility & rigidity requirements
- Follows flat addressing standards
 - *Good print contrast and proper font size*
 - *Address in proper location*
 - *½” clear zone around address block*
 - *Delivery address below and to the right of return address*





Machinable Parcels

- Parcels that are machinable must...
 - Be a minimum of 3” x 6” x ¼” x 6 ounces
 - Not exceed 17” x 27” x 17” x 35 pounds
 - Not weigh more than 25 lbs. when containing books or printed matter
 - Be a shape that will remain stable on conveyor belts during processing
 - Be sealed with material that adheres to the surface of the parcel
 - Have address on the side with largest surface



Machinable vs. Automation

- Many mailers get the terms Machinable and Automation confused
- Automation refers to the discount offered when the mailer pre-applies the barcode
- Automation rate mail must be Machinable
- Machinable lettersize mail without a barcode can still earn a presort discount



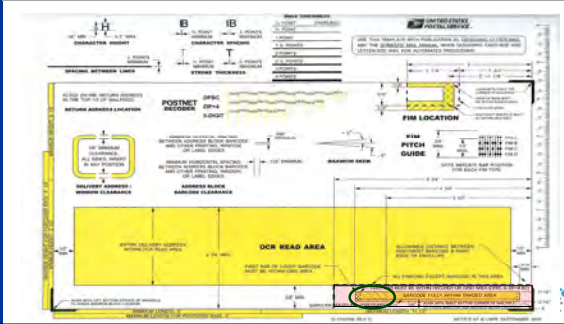
Automation Letters – Barcode Location

- Two approved locations on lettersize pieces
 - Barcode Clear Zone
 - Address Block
- Barcode Clear Zone
 - 4 3/4 inches long from bottom right corner
 - 5/8 inches high
- The left most bar must be between 3 ½” and 4 ¼” from right edge
- Try to keep this area clear on ALL lettersize mailpieces
- Notice 67 - Automation Template





Automation Letters – Barcode Location



Automation Letters – Barcode Location

- Address Block Barcodes
- Locations of barcode in address block
 - Above address
 - Below endorsement and key line
 - Below address
 - Above endorsement and key line
- Printing, label and window edge clearances
 - .028" above and below (1/32")
 - .125" left or right (1/8")



Automation Letters – Barcode Location

- Above Endorsement Line
*****S-DIGIT 00001
123456 T14 P3
Fred Flintstone
123 Quarry Ln
Bedrock BC 00001-9999
- Below Address Block
*****S-DIGIT 00001
123456 T14 P3
Fred Flintstone
123 Quarry Ln
Bedrock BC 00001-9999
- Below Endorsement & Keyline
*****S-DIGIT 00001
123456 T14 P3
Fred Flintstone
123 Quarry Ln
Bedrock BC 00001-9999





Other Lettersize Barcode Rules

- Barcode must be more than ½” from right or left ends of mailpiece
- Top of barcode, no more than 4” from bottom of mailpiece
- Bottom line of address or barcode no closer than 5/8” from bottom
- The infamous USPS tap test
 - Twice on the bottom
 - Twice on each end
 - On the top ???



The Infamous Tap Test

- Twice on the bottom, twice on each end



Automation Flats

- Most flats will qualify for automation rates
 - Minimum size – 5” high x 6” long x .009 thick
 - Maximum size – 12” high x 15” long x ¼” thick
- Longest edge is always the length
- Must be rectangular in shape
 - 1/8” rounded corners on cards are acceptable
- Must maintain uniform thickness
 - No more than ¼” between thinnest & thickest part
 - Do not measure 1” around perimeter
- Must meet flexibility and rigidity standards





Wrapping Flats

- **DMM 201.4.5.1**
- Polywrap is acceptable if material used is certified by the Postal Service
 - See postalpro.usps.com for a list of suppliers
- The polywrap must
 - Completely cover the flat
 - Seam must be parallel to the longest dimension and on non-address side
 - Overhang (selvage) not to exceed ½" total on the long edges and no more than 1 ½" total on the short edge



Other Requirements

- Tabbings of open edges is not required
- Clasps, strings, buttons, staples and other protuberances are not permitted
- Specific regulations for address location on Standard and Periodical flats
 - Does not apply to First-Class flats



Automation Parcels

- Delivery address and barcode must be on largest surface
- Must be sealed with something that adheres to the surface
- Barcode must be 1" from edges
- No printing within 1/8" of barcode
- Barcodes may appear in window if all other requirements are met
- No more than one delivery address barcode on each mailpiece





Machinable Rate Mail

- Lettersize machinable mail without barcodes is called Machinable, not longer Non-Auto
- This doesn’t mean that the pieces won’t be run on Postal Service equipment
- The Postal Service will attempt to put a barcode on all machinable pieces without barcodes
- Flats without barcodes are called Non-Auto flats



Machinable Letters

- The Aspect ratio must be maintained
- Machinable booklets or folded self mailers **must** be tabbed or glued
- Address block **should** be in OCR read area
- Non-address information **should** be at least 2 3/4” above bottom of mail piece
- Barcode clear zone **should** not contain any printing



Machinable Letters

- Maximum weight – 3.5 ounces
- Window envelopes are acceptable
- If the address is on a label or shows through a window you must maintain a print clearance are 1/8” on all sides
- Pieces must be flexible
- Addressing standards should be followed
 - ALL CAPS and Sans Serif fonts preferred
 - Print should have good contrast level





Non-Machinable Letters

- When a lettersize mailpiece is not compatible with automated equipment it is considered **non-machinable** and sorted by hand
- Non-machinable letters are not eligible for automation or machinable discounts
- These pieces are subject to a surcharge or higher rate
 - **First-Class** –
 - Retail – 49¢ each
 - Presorted - between 22¢ and 40.8¢ each
 - **Standard** –
 - between 49.7¢ & 78.7¢ per piece



Non-Machinable Letters

- What makes a lettersize piece non-machinable?
- **The Terrible Ten**
 1. Fails aspect ratio
 2. Made of, or wrapped in plastic
 3. Sealed with clasps, string, etc.
 4. Contents make thickness uneven
 5. Loose items like keys, coins, etc.
 6. Too rigid to bend in sorting equipment
 7. Larger than postcard & not at least .009 thick
 8. Address is parallel to short dimension
 9. Folded Self-Mailers not sealed properly (201.3.14)
 10. Booklets not sealed properly (201.3.16)



Paying for
Postage

In Advance..Please!





Paying for Postage

- All mailpieces must clearly show evidence of postage payment
- There are three basic options on how to pay the postage
 - Meter Imprints
 - Stamps
 - Permit Imprints
 - *Not like this!*



Postage Meters

- Postage meter machines were originally designed to allow businesses to print postage directly onto their mail or labels
- Because they are capable of printing various amounts of postage, businesses didn’t have to have an inventory of many different stamps
- Until the 1980’s meter heads had to be taken to the local Post Office to replenish funds
- Like most things with the USPS there are many regulations regarding the use of meters



Postage Meters

- Today’s meter machines are more advanced
 - Funds are transferred into meters electronically
 - Machines can weigh the mail and set the correct postage amount automatically
 - Many models have feeders and can seal envelopes
- Metered postage can be used on all classes of mail except Periodicals & Bound Printed Matter
- The meter head can only be leased from the manufacturer and mailers must obtain a meter license for every meter head





Postage Meters

- There are two different types of meters
- Information Based Indicia (IBI)
 - Includes a 2D barcode with a digital signature that is unique to each mailpiece
 - Different types of IBI imprint based on whether the ink used has fluorescent properties or not
- PC Postage
 - This is all postage that is purchased on-line and printed directly from a computer
 - Stamps.com or Endicia



Postage Meter Imprints



Pitney Bowes – Old Style



Neopost – IBI



DataPac – Netstamp



Metered Mail & Dates

- Some metered mail requires a complete date
 - First-Class, Priority and Express Mail
 - Any time Extra Services are requested
- These classes must show the date the mail is entered in the meter imprint
- Mail entered after date shown must be re-dated with the correct date of entry
 - This is called a “stale date”, usually \$0.00 on the back of the mailpiece
- Entering discounted mail using meter imprints requires a permit at the entry office





Precanceled Stamps

- Precanceled stamps are used on presorted mail
- Stamps were originally precanceled by the USPS to prevent reuse
- Today, precanceled stamps show the class of mail, not a numeric value
- When precanceled stamps are used the piece must have a complete return address





Precanceled Stamps

- Precanceled stamps are paid for when picked up from the Postal Service
- Precanceled stamps have an assigned value



Presort
First-Class
25c



Presort
Standard
10c



Nonprofit
5c



Precanceled Stamps

- The difference between what was paid for the stamps and total postage for mailing must be paid when mail is entered
 - *This amount can be deducted from a permit deposit account or through the Enterprise Payment System*
- Stamps are available in rolls and can usually be affixed on standard tabbing equipment





Precanceled Stamps

- If return address is not in the delivery area where the permit is held the mailer must
 - Put a mailer’s postmark over the stamp to show where the mail was entered...or
 - Submit with the mailing, a copy of the mailing statement and sample of mailpiece to forward to postmaster of the office in the return address



Permit Imprints

- Allows mailing without affixing “live” postage
 - Usually called an “indicia”
- Payment of postage is made at time of entry
- The permit imprint is usually printed when the piece is created or addressed
- Authorization to use a permit is required
 - Form 3615 & non-refundable application fee (\$370)
- An annual usage fee must also be paid (\$370)



Permit Imprints

- Can not be hand drawn or typewritten
- Address block and permit must read in the same direction
- Minimum of 200 pieces or 50 pounds
 - Some discounted level require higher quantities
- All pieces must be of identical weight
- Permit must be placed in the upper right corner of mailpiece or address area
 - Exception when printed at the same time as the address is printed





Permit Imprints

- When not printed as part of addressing process the permit must meet the following guidelines
 - Minimum size - ½" square
 - Minimum font size – 4 point
 - Must remain legible from a normal reading distance
- Permit imprints can be used on all classes of mail except Periodicals



Permit Content

- Top Line - **Class of Mail**
 - Priority Mail Express or Priority Mail
 - First-Class Mail or Presorted First-Class Mail
 - Standard or STD or Presort Standard or PRSRT STD
 - Nonprofit or Nonprofit Org
 - Package Services – Correct sub-class marking
- Line 2 or 2 & 3 - **U.S. Postage Paid**
- Line 4 - **City and State** where permit is held
- Line 5 - **Correct permit number**
 - Lines 4 & 5 can be swapped
- City and state may be replaced by
 - Mailed from ZIP Code 'nnnnn'



Company Permit

- Replaces the Permit Number and City/State with the “Company’s Name”
- The same permit imprint can be used on any post office where the company holds a permit
- Mailing records and a sample must be retained for one year by the permit holder or their agent
- Mailpiece must have a complete return address
 - That shows the physical location where mailer keeps their records pertaining to the mailing or identifies a contact that can access the records





Enterprise Payment System (EPS)

- Formerly know as CAPS
- EPS allows participants to pay for postage, products and many other USPS services through a single account
- Two types of accounts
 - *Trust* – Mailer deposits money on the account and payments are deducted
 - *ACH Debit* – EPS is linked to a bank account and payments are withdrawn through ACH type transactions



Welcome to

MAILER’S
BOOTCAMP
Day 4



Mailers Hub
*Bringing Commercial Mailing,
Resources, and Solutions Together*

Reply Mail

- Allows an easy method for customers to communicate with your business using the mail
- There are three basic types of reply mail
 - *Business Reply Mail (BRM)*
 - Addressee pays postage and handling fees
 - Many rules, regulations and fees
 - *Courtesy Reply Mail (CRM)*
 - Responder pays postage when returning
 - *Meter Reply Mail (MRM)*
 - Addressee pays postage, no handling fees





Business Reply Mail (BRM)

- Pre-printed response device that addressee pays the postage only when the customer returns the mail
- USPS collects handling fee and First-Class postage from the BRM permit holder
- Various methods for paying postage
 - *Payment upon delivery*
 - *Automatic Deduction from Postage Due account*
 - *Automatic Deduction from BRM Advance Deposit Account*



Business Reply Mail

- Requires authorization (permit) and annual fee
 - *\$370.00 per year*
- BRM Advance Deposit account has an additional annual fee and reduces the per piece handling fees
 - *\$1080.00 per year*
- The permit holder guarantees payment of postage and handling fees
- Business Reply mail types
 - *Cards, Envelopes, Labels*



Business Reply Mail (BRM)

- Business Reply has very specific format elements that must appear on each piece
- All ink colors are acceptable as long as a 40% print contrast ratio is maintained



- **NO POSTAGE NECESSARY IF MAILED IN THE UNITED STATES** endorsement
 - *Upper right corner of mailpiece*



- **BUSINESS REPLY MAIL** legend
 - Above address in **ALL CAPS** at least **18 pt** high
 - Reply labels must read **BUSINESS REPLY LABEL**



- The words **FIRST-CLASS MAIL, PERMIT NO.** and the **CITY** and **STATE** where permit is held must be printed directly below the BRM legend

- An endorsement reading **POSTAGE WILL BE PAID BY ADDRESSEE** must appear directly below the permit information



- The entire address should be in the OCR read area (big yellow box/notice 67)



BRM – Mailpiece Format

- A minimum of four horizontal bars must be placed below the ‘NO POSTAGE NECESSARY’ to assist with identification
 - Not required on QBRM



- Bars must be the same size and evenly spaced
 - at least 1” long & between 1/16” to 3/16” thick and must not extend below the baseline of the delivery address line



FIM - Facing Identification Marks

- Required only on lettersize reply mail
- These marks are used to separate reply mail from other mail during cancellation process



- Business Reply uses FIM B or a FIM C
 - FIM B for pieces WITHOUT a barcode
 - FIM C for pieces WITH a barcode



More BRM Stuff

- USPS strongly suggests pre-barcoding Business Reply Mail
- A unique ZIP+4 barcode must be used
 - In barcode clear zone or in the address block
 - IMb is required on QBRM
- Discounts available for high volume users who pay an annual accounting fee –\$1080.00
 - Handling fee reduced by \$1.074 per piece
 - Breakeven around 1000 pieces per year





Qualified Business Reply Mail (QBRM)

- Processed entirely on automated equipment
- QBRM has unique ZIP+4 assigned by the USPS based on weight and category of BRM
 - Postcard, 1-ounce letter, 2-ounce letter
- Correct unique ZIP+4 and IMb must be used on the matching mailpiece
- Pre-production samples must be approved by the Postal Service
- Postage reduced by 2.5¢
- Handling fee reduced by 10¢



Business Reply Mail -Oops



Courtesy Reply Mail (CRM)

- Courtesy Reply Mail is a pre-printed reply device where recipient usually affixes the postage when mailed back
- CRM uses the FIM A
- No authorization or permit is required
- Pieces should be designed for processing on automated equipment
- Preferred elements
 - postage reminder
 - barcode
 - delivery address
 - return address area





Courtesy Reply Envelope

From

Make-A-Wish.

Make-A-Wish®
Gift Processing Center
P.O. Box 97104
Washington, D.C. 20090-7104

Place Stamp Here

Postnet barcode

Meter Reply Mail

- Meter reply mail is a CRM with metered postage already applied
- Meter imprint must not show a date
- Must show endorsement reading
 - NO POSTAGE STAMP NECESSARY,
POSTAGE HAS BEEN PREPAID BY
- FIM A for meters
- FIM D for PC based postage
- Pre-barcoded piece recommended

Reply Mail – General Rules

- Pieces larger than 4 1/4 x 6 must be .009 thick
- The minimum size for a Business Reply Label that is affixed to a piece of mail is 2” x 3 1/2”
- Domestic BRM may not be sent to foreign countries
- International Business Reply Service (IBRS) information is available in the Int’l Mail Manual or at pe.usps.gov

AIR MAIL
PAID BY ADDRESSEE

INTERNATIONAL BUSINESS REPLY MAIL RESPONSE PAYEE

WIZ CORPORATION
107140 STRAL DR
MILFORD MA 01860
UNITED STATES OF AMERICA



Other Services and Programs from the USPS



Extra Services

- Value added services provided in addition to regular delivery
 - *Certified, Registered, Insured, Return Receipt Delivery Confirmation, etc.*
- Most have an additional service charge
- Multiple Extra Services can be used
- Specific Extra Services can only be used with certain classes of mail
- Extra Service “tags” may be privately printed after obtaining authorization from the USPS



USPS Tracking

- This service has been upgraded and renamed Informed Visibility, Mail Tracking and Reporting
 - *a.k.a. - IV-MTR*
- Previous versions were able to track as pieces only when they were processed through automated equipment
- This new service will provide near real-time of delivery to the mailbox
- This is done through the use of GPS’s in the scanners the carriers use during delivery





Mail Anywhere

- Mailers can use the same permit imprint and enter mail at any Post Office with a BMEU
- Must be a Full-Service mailer and have an Enterprise Payment System (EPS) account
- Authorization must be obtained to participate
- Entry office, office where permit is held, and payment account are linked in mail.dat file
- Also available for pre-cancelled and meter permits
- Destination office permit fees are waived



Informed Delivery (ID)

- Provides consumers with a digital images of letters that are to be delivered soon
- These images can be accessed via e-mail, online dashboard or mobile app
- Images are from pieces that are processed through USPS automated equipment
 - A maximum of 10 pieces per day
- This service is available free to residential addresses and select PO Boxes



Informed Delivery (ID)

- ID will also provide information on packages that have been scanned as they move through the USPS network
- You must have a USPS account and enroll to participate
- Informed Delivery Interactive Campaigns are available to businesses
- These campaigns link physical mail pieces to digital images with click through links





Informed Delivery Campaigns

- 4-color digital images of the mailpiece are uploaded to the USPS along with click through links that have a call to action
 - *These images are at the top of the daily e-mail*
- Program also provide data on e-mail open rates and click through rates
- There are specific guidelines to participate in the interactive campaigns
- More information can be found at <https://www.usps.com/business/informed-delivery.htm>



Informed Delivery Campaigns



- About 6% click through before they ever receive the mail piece

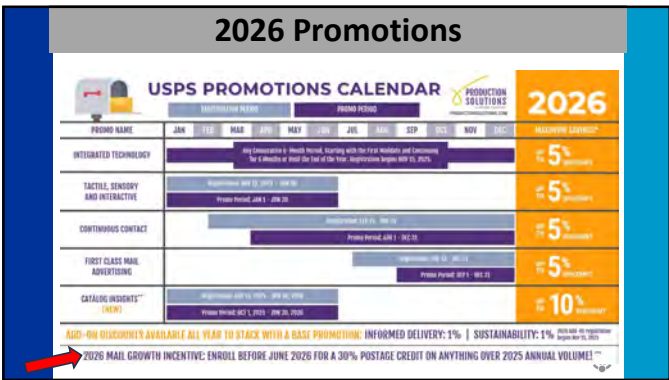


USPS Promotions

- The USPS has set up promotional opportunities allowing mailers to earn postage discounts.
- These are announced on an annual basis
- Mailers must be Full-Service and register for the promotion during a specific time frame







Data is not a 4 letter word

It’s a major player in a successful mailing



The Right List

- Good data is the key to make sure your customer’s message is getting to the right person
- Defining the audience is primary in the success of any marketing mail project
- Most lists used today are provided by the customer and not primarily intended for mailing
- List Rentals - *Get references*



Manipulating Data

- What are the customer’s expectations?
- Are you just using name and address information or is there more?
- How accurate are the addresses?
 - CASS Certification & DPV
 - NCOA^{link}
- What to do about foreign addresses?
- Answers to these questions are important when setting up a job
- What is Data Manipulation



Manipulating Data

1	Andrews	Jay Robert	350 Alisal Mesa Road, Solvang, CA 93403
2	Archer	Rich	
3	Adams	MM Victoria	PO Box 50117, Santa Barbara, CA 93150
4	Bach	MM John	1302 Tanager Lane, Carpinteria, CA 93013
5	Becker	Phyllis	34 W. Mission St., Santa Barbara, CA 93101
6	Behrman	Dr. Michael	1430 Jolinda Drive, Santa Barbara, CA 93108
7	Berenshaw/Griffin		27 E. Victoria St., Santa Barbara, CA 93101
8	Bennett	Mrs. Donald	1070 Onaka Rd., SB, CA 93108
9	Bishop	MM John/Jul	Delta Vista Drive, Santa Barbara, CA 93108
10	Biss	MM Timothy	P.O. Box 50840, Santa Barbara, CA 93150
11	Brainard	Chris	233 Modale Road, SB, CA 93108
12	Brownlee	Dr. & Mrs. Elrod	133 Butterfield Lane, SB, CA 93108
13	Bryant	Dr. & Mrs. Bob	BRYANT & SONS JEWELERS, 812 State St., SB 93101
14	Bryant	Mr. & Mrs. Michael	BRYANT & SONS JEWELERS, 812 State St., SB 93101
15	Buchanan	Dr. David & Mrs.	320 Ortega Ridge Road, Santa Barbara, CA 93108
16	Cable	Ruth	251 Toro Canyon Rd., Carpinteria, CA 93013
17	Caputo	MM John	519 Francisco Avenue, Camarillo, CA 93010
18	Carrisi	Christopher	PO Box 5722, SB, CA 93150
19	Carrisi	Harold/Joey	550 Ash Avenue Unit D, Carpinteria, CA 93013
20	Coe	Nancy Belle	Music Academy of the West
21	Colwell/Chick	Mrs. Nadine	1485 Church Street, Ventura, CA 93001
22	Collins	MM Mark S.	2797 Shalimar Avenue, Ventura, CA 93001
23	Connors	James/Patty	1962 East Valley Road, SB, CA 93108
24	Conrad	MM Barnaby	8132 Puente del Sol, Carpinteria, CA 93013
25	Cowdell	MM Glen	590 Lutz Lane, SB, CA 93108
26	Criswell	Linda	Oriskany Cottage, 159 La Vereda Rd., Santa Barbara, CA 93105
27	Daniels	Elizabeth/Charles	
28	Daniels	Glen & Ann	5069 Calle Real, Goleta, CA 93117
29	Davis	Yvonne/Elmer	4477 Shadow Hill Blvd., Apt. G, Santa Barbara, CA 93105
30	DeHog	MM Patrick	425 Lambert Road, Carpinteria, CA 93013
31	DeHog	MM Robert	3099 Padana Lane, Carpinteria, CA 93013





Manipulating Data

A	B	C
Last Name	First Name	Address
1	Ames	4033 Foothill Blvd Ventura CA 93003
2	Angiano	200 S. Linden St. Ventura, CA 93004
3	Brace	1521 Robbins St Santa Barbara CA 93101
4	Brown	392 Reyes Hwy Apt 12 Ventura CA 93001
5	Coslin	1049 Windshore Way Oxnard CA 93035
6	Cuberson	1025 Reservoir St Camarillo CA 93010
7	Daniel	37 Locust Ave Ventura, CA 93003
8	Finkels	4491 Westmont Street Ventura, CA 93003
9	Gering	P O Box 390 Santa Barbara CA 93102
10	Guthrie	10416 Dorchester St Bakersfield, CA 93311
11	Hall	6901 Riverside Ter Austin, TX 78759
12	Hansen	951 Santa Fe Ave Ventura CA 93004
13	Hendley	1655 Alana Lane Santa Barbara CA 93110
14	Hewes	10945 Placer Hills Rd Mendocino, CA 95722
15	Jamies	6772 Aviano Dr Camarillo, CA 93012
16	Kirby	537 Quinn Avenue Camarillo, CA 93010
17	Lane	185 Vinde Oak Drive Oak View CA 93022
18	Lynn	5973 Santa Susana Ct Ventura CA 93003
19	March	1915 Cliff Dr. Santa Barbara, CA 93109
20	March	3700 Maple Ventura, CA 93001
21	Martin	424 S. Lumswood Tr Cedar Park, TX 78613
22	Martin	22916 St. Fort Nunez, CA 93341
23	McIntosh	39949 Placer Hills Rd. Mendocino, CA 95722
24	McIntosh	1812 Trinity Ave. # 312 Walnut Creek, CA 94598
25	McIntosh	185 Via Ray Ventura CA 93003
26	Naughton	964 Martin St Ojai, CA 93023
27	Naughton	940 Bracken Way Ventura CA 93001
28	Sherr	731 Dos Hermanas Rd Santa Barbara CA 93111
29	Slaughter	1100 Yocum St Pasadena CA 91103
30	Slaughter	4623 Via Sonoma Santa Barbara CA 93111



Manipulating Data

A	B	C
NAME	ADDRESS	CITY
1	MRS AND MRS ALLENWORTH	414 CEDERHILL LANE SANTA BARBARA, CA 93111
2	BETTY KUCKEL	10108 EMPYREAN WAY # 202 LOS ANGELES, CA 90047
3	YVETTE TANDERELLA	5701 ROSSANA BLVD FOLSOM, CA 95630
4	JOSEPH & DONNA CHURCH	477 JEANNE CT SEABURY PARK, CA 91308
5	DOLORES DUBENEZ	348 CHESTNUT HILL CT # 35 THOUSAND OAKS, CA 91320
6	JOY FARLEY	26 MORRIS LN VENTURA, CA 93001
7	Rosa Gascay	1130 E Clark Ave STE 257 SANTA BARBARA, CA 93101
8	ZACHARY EITZEL	8006 TERRELL LANE HAWTHORN, VA 22986
9	ZACHARY KRAMER &	5073 WEST SUNSET DR LAKE OSHEO, OH 44130
10	BARBARA LEBERT	1275 FARWAY DR CARMELO, CA 93919
11	MRS & MRS DANIEL	4432 MEADOW LANE, SANTA BARBARA, CA 93101
12	MRS & MRS LYN	710 CLINTON OAKVILLE, MO 64450
13	JOEL MITCHELL	2425N MELO RD, MESA, CA 90045
14	AMANDA WYNN	1840 N NEVADA ST GAINSBORO, VT 05741
15	MRS QUINN MILLER	4363 34TH STREET SA SAN DIEGO, CA 92104
16	DANIELLE POTTER	3700 DEAN DR RBR 3501 VENTURA, CA 93003
17	CLARK WOLLEY	151 CHESTNUT AVE PORTOLA VALLEY, CA 94558
18	ROBERT DODD	5655 WOODBURY AVENUE VENTURA, CA 93002
19	LESLIE SALVIN	279 CONNOR AVE LONG BEACH, CA 90801
20	MRS LARRY VILLA	85 BANNA CIRCLE SANTA PAULA, CA 93060
21	Judy Henry	1650 ANNA LN Santa Barbara, CA 93101
22	CATHERINE LORENZEN	54 RUFFINO AVE REDDINGFIELD, NJ 07070



Manipulating Data

A	B	C	D	E
1029	Olivia Martin	2525 State St. #30	Santa Barbara	CA 93101
1030	Debra Macaluso	2525 State St. #31	Santa Barbara	CA 93101
1031	Gail Spence	2525 State St. #32	Santa Barbara	CA 93101
1032	Eric Smith	2525 State St. #33	Santa Barbara	CA 93101
1033	Vivian Acosta	2525 State St. #34	Santa Barbara	CA 93101
1034	John and Amelia Martinez	2525 State St. #35	Santa Barbara	CA 93101
1035	John Martinez	2525 State St. #36	Santa Barbara	CA 93101
1036	Mr. and Mrs. Kenneth S. Thomsen	2525 State St. #37	Santa Barbara	CA 93101
1037	Conita Peterson	2525 State St. #38	Santa Barbara	CA 93101
1038	William and Elizabeth Jones	2525 State St. #39	Santa Barbara	CA 93101
1039	Freda Lomeli	2525 State St. #40	Santa Barbara	CA 93101
1040	Sara Bouch	2525 State St. #41	Santa Barbara	CA 93101
1041	Mr. Elizabeth S. Wilson	2525 State St. #42	Santa Barbara	CA 93101
1042	Marceline Young	2525 State St. #43	Santa Barbara	CA 93101
1043	Bill and Sarah Kuchinski	2525 State St. #44	Santa Barbara	CA 93101
1044	Mr. and Mrs. Gary	2525 State St. #45	Santa Barbara	CA 93101
1045	Ken Schaefer and William Wood	2525 State St. #46	Santa Barbara	CA 93101
1046	Alan and Cathy Van Vleet	2525 State St. #47	Santa Barbara	CA 93101
1047	Christine Grogg	2525 State St. #48	Santa Barbara	CA 93101
1048	George R. and Nancy Gory	2525 State St. #49	Santa Barbara	CA 93101
1049	Margaret Chisley	2525 State St. #50	Santa Barbara	CA 93101
1050	Mr. and Mrs. Richard F. Scott	2525 State St. #51	Santa Barbara	CA 93101
1051	Mr. and Mrs. Richard F. Scott	2525 State St. #52	Santa Barbara	CA 93101
1052	Margie Bailey	2525 State St. #53	Santa Barbara	CA 93101
1053	Edward and Lila Gilman	2525 State St. #54	Santa Barbara	CA 93101
1054	John and Lila Gilman	2525 State St. #55	Santa Barbara	CA 93101
1055	John and Lila Gilman	2525 State St. #56	Santa Barbara	CA 93101
1056	John and Lila Gilman	2525 State St. #57	Santa Barbara	CA 93101
1057	John and Lila Gilman	2525 State St. #58	Santa Barbara	CA 93101
1058	John and Lila Gilman	2525 State St. #59	Santa Barbara	CA 93101
1059	John and Lila Gilman	2525 State St. #60	Santa Barbara	CA 93101
1060	John and Lila Gilman	2525 State St. #61	Santa Barbara	CA 93101
1061	John and Lila Gilman	2525 State St. #62	Santa Barbara	CA 93101
1062	John and Lila Gilman	2525 State St. #63	Santa Barbara	CA 93101
1063	John and Lila Gilman	2525 State St. #64	Santa Barbara	CA 93101
1064	John and Lila Gilman	2525 State St. #65	Santa Barbara	CA 93101
1065	John and Lila Gilman	2525 State St. #66	Santa Barbara	CA 93101
1066	John and Lila Gilman	2525 State St. #67	Santa Barbara	CA 93101
1067	John and Lila Gilman	2525 State St. #68	Santa Barbara	CA 93101
1068	John and Lila Gilman	2525 State St. #69	Santa Barbara	CA 93101
1069	John and Lila Gilman	2525 State St. #70	Santa Barbara	CA 93101
1070	John and Lila Gilman	2525 State St. #71	Santa Barbara	CA 93101
1071	John and Lila Gilman	2525 State St. #72	Santa Barbara	CA 93101
1072	John and Lila Gilman	2525 State St. #73	Santa Barbara	CA 93101
1073	John and Lila Gilman	2525 State St. #74	Santa Barbara	CA 93101
1074	John and Lila Gilman	2525 State St. #75	Santa Barbara	CA 93101
1075	John and Lila Gilman	2525 State St. #76	Santa Barbara	CA 93101
1076	John and Lila Gilman	2525 State St. #77	Santa Barbara	CA 93101
1077	John and Lila Gilman	2525 State St. #78	Santa Barbara	CA 93101
1078	John and Lila Gilman	2525 State St. #79	Santa Barbara	CA 93101
1079	John and Lila Gilman	2525 State St. #80	Santa Barbara	CA 93101
1080	John and Lila Gilman	2525 State St. #81	Santa Barbara	CA 93101
1081	John and Lila Gilman	2525 State St. #82	Santa Barbara	CA 93101
1082	John and Lila Gilman	2525 State St. #83	Santa Barbara	CA 93101
1083	John and Lila Gilman	2525 State St. #84	Santa Barbara	CA 93101
1084	John and Lila Gilman	2525 State St. #85	Santa Barbara	CA 93101
1085	John and Lila Gilman	2525 State St. #86	Santa Barbara	CA 93101
1086	John and Lila Gilman	2525 State St. #87	Santa Barbara	CA 93101
1087	John and Lila Gilman	2525 State St. #88	Santa Barbara	CA 93101
1088	John and Lila Gilman	2525 State St. #89	Santa Barbara	CA 93101
1089	John and Lila Gilman	2525 State St. #90	Santa Barbara	CA 93101
1090	John and Lila Gilman	2525 State St. #91	Santa Barbara	CA 93101
1091	John and Lila Gilman	2525 State St. #92	Santa Barbara	CA 93101
1092	John and Lila Gilman	2525 State St. #93	Santa Barbara	CA 93101
1093	John and Lila Gilman	2525 State St. #94	Santa Barbara	CA 93101
1094	John and Lila Gilman	2525 State St. #95	Santa Barbara	CA 93101
1095	John and Lila Gilman	2525 State St. #96	Santa Barbara	CA 93101
1096	John and Lila Gilman	2525 State St. #97	Santa Barbara	CA 93101
1097	John and Lila Gilman	2525 State St. #98	Santa Barbara	CA 93101
1098	John and Lila Gilman	2525 State St. #99	Santa Barbara	CA 93101
1099	John and Lila Gilman	2525 State St. #100	Santa Barbara	CA 93101





Dupe Elimination

- Sometimes known as Merge/Purge
- It’s important to detail exactly how you want to identify what is a duplicate
- Examples
 - One per address
 - One per name and address
 - One per name only
 - One per Company
 - Suppression lists



Dupe Elimination

```
DUPLICATE RECORDS SUMMARY REPORT (2/3/2016)
Report Title:

List description:      Ocean Reef Club
File name:             C:\Users\heiniach\Documents\Jobs\Sundance\
Index name:            DEL_POINT
Index expression:      UPPER(ZP4DFCMB)
Records scanned:      5,913
Number of groups:      120
Number of duplicates:  268
Records in all groups: 388
Recs in largest group: 125
Scanning time:        00:00:09
```



Dupe Elimination

```
DUPLICATE RECORDS SUMMARY REPORT (2/3/2016)
Report Title:

List description:      Ocean Reef Club
File name:             C:\Users\heiniach\Documents\Jobs\Sundance\
Index name:            ADDRESS
Index expression:      UPPER(ZP4DFCMB+DELADDR)
Records scanned:      5,913
Number of groups:      112
Number of duplicates:  133
Records in all groups: 245
Recs in largest group: 8
Scanning time:        00:00:00
```





Dupe Elimination

Duplicate Records Summary Report (2/3/2016)
Report Title:

List description: Ocean Reef Club
File name: C:\Users\heiniach\Documents\Jobs\Sundance
Index name: ADD_NAME
Index expression: UPPER(ZP+DPCMB+FULLNAME)
Records scanned: 5,913
Number of groups: 7
Number of duplicates: 7
Records in all groups: 14
Recs in largest group: 2
Scanning time: 00:00:00

Output Methods

- How is the piece going to be addressed?
 - Inkjet
 - Labels
 - Laser merge mail
 - Digital Imaging
- What information will be used?
 - Address only
 - Address & keycoding
 - Data driving digital images
- Will data be used for other marketing efforts?
 - Social Media
 - Informed Delivery

How come we have to
do all the work?

How Presort Works



Presorting

- Discounted mail must be sorted to allow it to travel as close to its final destination as possible before the USPS has to process the individual pieces
- Presort software does the work of placing the addresses in the proper sortation order
- ZIP code order and presort order are completely different
- Presort is based on the hub & spoke theory

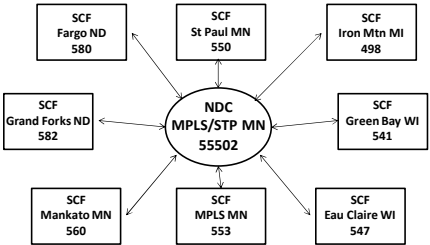
The Postal Network

- **NDC – National Distribution Center**
A network of 29 primary locations that act as central sorting and distribution facilities for large geographic areas
Trays, sacks and pallets only
No First-Class Mail
NDC MPLS/STP serves ZIP codes beginning with 497-498 (MI), 540-548 (WI), 550-567 (MN), 580-588 (ND)



The Postal Network

- **NDC - Network Distribution Centers**





The Postal Network

- **SCF – Sectional Center Facility**
A network of 217 locations that act as a sorting and distribution facilities for mail destined to 5-digit ZIP codes
Processes all classes of individual pieces

SCF MPLS MN serves ZIP codes that begin with 553–555
SCF St Paul MN serves ZIP codes that begin with 540, 550–551
SCF Fargo ND serves ZIP codes that begin with 580-581, 584

The Postal Network

- **SCF – Sectional Center Facilities**

SCF ST PAUL MN 550

How Sortation Works - Letters

Embarrass MN 55732 → AADC ST PAUL MN 550 → MXD DENVER CO 800

5-DIGIT 2 passes AADC 2 passes MXD AADC 1 pass



How Sortation Works - Flats

Embarrass MN
55732

SCF ST PAUL MN
550

AADC TWIN CITIES MN
554

MXD DENVER CO
800

5-DIGIT

3-DIGIT

AADC

MXD ADC

You can no longer use sacks for Standard or Periodical Flats, you must use flat mail trays/tubs

Transportation Discounts (Drop Ship)

- Mail transported closer to its final destination receives additional discounts
 - SCF (P&DC)
 - Lettersize discount is 1.7¢ per piece
 - Flats discount – 3.8¢ per piece
 - DDU - *Carrier Route Flats Only*
 - Discount is 4.9¢ per piece

How Drop Ship Works

ORIGIN SCF/LPC

ORIGIN NDC/RPDC

DESTINATION NDC/RPDC

DESTINATION SCF/LPC

ORIGIN BMEU

MAILER

DESTINATION ADDRESS

DESTINATION POST OFFICE

SCF Entry – Letters - \$17.00/1000
SCF Entry – Flats - \$38.00/1000



eInduction

- eInduction eliminates the need for hard copy forms 8125 and 8017 and manual reconciliation at the entry facility for drop shipped mail
- You must be a Full-Service mailer to participate
- Information about the shipment is all included in the mail.dat file
- At the receiving PO, the pallet flags are scanned and verified against the mail.dat to show that the pallet is in the correct location and postage has been paid



Presentation

- All discounted mail must be entered through the “ back door” of a postal facility at the Business Mail Entry Unit (BMEU)
- Supporting documentation must be submitted electronically
- The presorted mail is usually weighed, checked for accuracy of the presort, quality of the addresses and barcode information
- Once all these processes have been approved, the mail is entered into the mailstream



Oop\$, Goof\$
and Flub\$

The True Co\$t of
Design Blunders





a. k. a.

I'm gonna have to pay
how much more
postage?



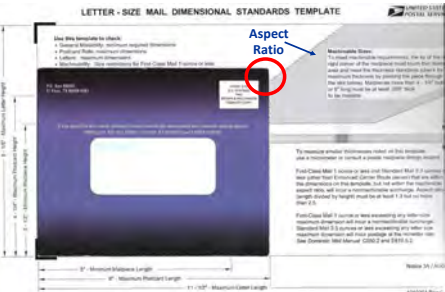
Design Oop\$ #1

Folded Self Mailer
6" x 5" – Aspect Ratio – 1.2



Design Oop\$ #1

LETTER - SIZE MAIL DIMENSIONAL STANDARDS TEMPLATE





Design Oop\$ #1

- Self Mailer did not meet aspect ratio rules
- Piece would not qualify as machinable or for automation prices
- Currently could mail only at Non-Machinable letter prices
- 300,000 total pieces mailed
 - 240,000 at 5-digit rate - **+49.7¢ each**
 - 60,000 at 3-digit rate - **+63.9¢ each**

Average Increase of 52.5¢ per piece

In January 2006, the nonmachinable surcharge for regular Standard Mail letters increased from \$0.04 to \$0.042.



What is a Fletter?

- Any mailpiece which physically meets lettersize specifications but could be considered flat size due to address orientation
- Fletters can usually be mailed as a non-machinable letter or automation flat
- Changing the orientation of the address can save up to 90% or more in postage costs



Design Oop\$ #2

Lettersize Booklet
6” x 9”

Address parallel to short edge





Design Oop\$ #2

Design Oop\$ #2

Design Oop\$ #2

- **Standard Fletter**
 - Lettersize piece mailing as flat due to design and address parallel to short edge
- **217,000 pieces mailed**
 - 174,000 at 5-digit rate - **+39.8¢ each**
 - 43,000 at 3-digit rate - **+57.9¢ each**
- **Average Increase of 43.3¢ per piece**
- **Client had mailed three times with another company, before learning that turning the address 90° could have saved them over \$100,000.00 in unnecessary postage**



Design Oop\$ #3 – Version A

Folded Self Mailer – 6” x 11” – Vertical Fold on Lead Edge

[Fold at this end](#) ↩

Design Oop\$ #3 – Version B

Folded Self Mailer – 6” x 11” – Vertical Fold on Trailing Edge

↩ [Fold at this end](#)

Design Oop\$ #3 – Version B

- Piece is non-machinable because of vertical fold on the trailing edge
- Can only mail as non-machinable letter or as automation flat with some modifications
- 475,000 total pieces mailed
 - 380,000 at 5-digit prices – +49.7¢ each
 - 95,000 at 3-digit prices – +63.9¢ each

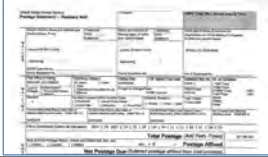
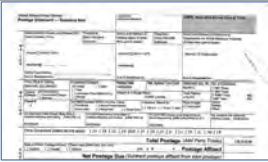
Average Increase of 52.5¢ per piece

Today's Postage Impact - \$249,565.00

In 2005, the impact would have been \$19,950.00



Actual 3602's



Non-Machinable
Postage Estimate
\$136,819.88

Postage Saved - \$49,052.30

Non-Machinable &
Carrier Route
Actual Postage
\$87,767.58



Design Oop\$ #3 – Possible Solution

Mail as Automation Flat



Design Oop\$ #3 – Possible Solution

- Flat regulations require unwrapped piece to have bound or final folded edge on right
- If mailed as an Automation Flat with vertical fold on leading edge & address upside-down
- 475,000 total pieces mailed
 - 380,000 at 5-digit prices – +39.8¢ each
 - 95,000 at 3-digit prices – +57.9¢ each

Today’s Postage Impact - \$210,225.00

\$39,340.00 less than mailing as non-machinable



Mailability Oop\$ #1

Folded Self Mailer – Designed to look like a Smart Phone



Mailability Oop\$ #1

Piece is Not Mailable due to rounded corners



Mailability Oop\$ #2

Piece is Not Mailable due to die-cut shape





Mailability Oop\$ #3

Piece is Not Mailable due to die-cut shape



1

Production Caused Oop\$ #1

5" x 8" Folded Self Mailer



Does not qualify for Automation

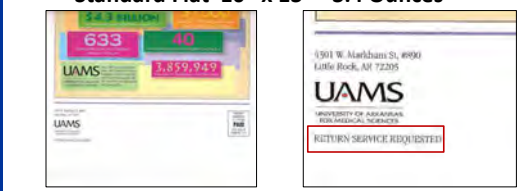
Barcode too close to right edge

Must be 1/2" minimum

Postage is now about 3.5¢ per piece more

Ancillary Endorsement Oop\$ #1

- Use of wrong ancillary endorsement line – Standard Flat 10" x 13" - 3.4 Ounces



- Return Service Requested – \$2.44

- Change Service Requested – 93¢



Return Address Oop\$ #1

6" x 9" Card with Return Address on bottom left

Annette Parker
Selling Las Vegas Like No Other!
Office: (702) 362-9797
Cellular: (702) 277-0619
Toll Free: (800) 331-6274

SPANISH TRAIL REALTY
4197 WEST TROPICANA AVENUE • SUITE 100
LAS VEGAS, NEVADA 89103

Barney Rubble
99 Quarry Rd
Bedrock BC 00001-0001

Return Address Oop\$ #2

Digitally Printed Sheet converted to Envelope
– Quantity 2,000

Their Return Address

More Oop\$

Catalog mailed using Non-Profit permit

BE AMAZED
2018-2019 SEASON
SUBSCRIBE TODAY
ONE ECONOMY

THANK YOU TO OUR MEMBERS
MAILED BY THE PRESS DEMOCRAT
100% POSTAGE PAID PERMIT NO. 123456



More Oop\$

It’s not always the postage cost!

Automation Sort

Statement Seq. No.	No. of Containers	
78989A	1' MM Trays	4193
	2' MM Trays	2671
Total Pieces	2' EMM Trays	
1,423,296	Total Trays	6864
Total Weight	Sacks	
44,833.8240	Pallets	
	Other	
Date of Carrier	Detached Address Labels?	
45/245/445	(DMM 602.4)	
	☐ Yes ☒ No	
J [] K [] L [] M [] S		
(Add Parts Totals)		
293,749.81		

Carrier Route Sort

Statement Seq. No.	No. of Containers	
78989panelsACDK2	1' MM Trays	9680
	2' MM Trays	2312
Total Pieces	2' EMM Trays	
1,423,296	Total Trays	11992
Total Weight	Sacks	
44,833.8240	Pallets	
	Other	
Date of Carrier	Detached Address Labels?	
45/245/445	(DMM 602.4)	
	☐ Yes ☒ No	
J [] K [] L [] M [] S		
(Add Parts Totals)		
292,880.87		

Help! Please Help!

I Know Someone
is Out There!

Resources

www.usps.com

– general information

pe.usps.gov

– DMM and QSG online

postalpro.usps.com

– detailed information

Mailpiece Design Analyst (MDA)

MDA hotline - 855-593-6093 or MDA@usps.gov

Business Mail Entry Unit

Domestic Mail Manual & Various Pubs

Trade Associations like Mailer’s Hub

www.mailershushub.com

Postal Hotline/Postal Professor

303-332-4112 or help@mailershushub.com



OK, What’s Next

- Attempt to get involved in design process early
- Suggest to internal customers and designers to create pieces that fall into the letter category
- Help your customers and designers learn USPS regulations and their impact on postage costs
- Do your homework when there is an issue
- When getting a ruling from the USPS try to get it in writing
 - Chapter & Verse from DMM
 - Name, Phone Number & E-mail



Thank for your
Attention and
Participation

Please don’t forget to fill
our your evaluations

Happy Trails



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