**IMb is as Easy as
1 – 2 – 3**

Full-Service Intelligent Mail Options
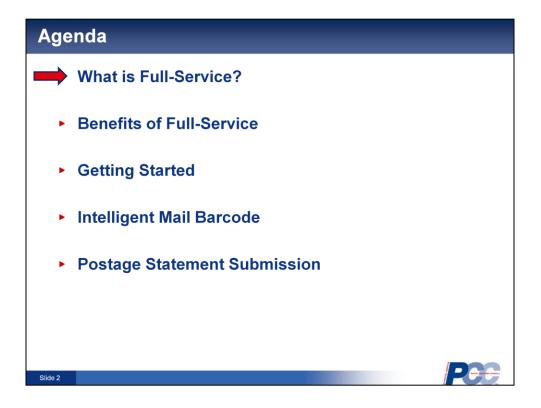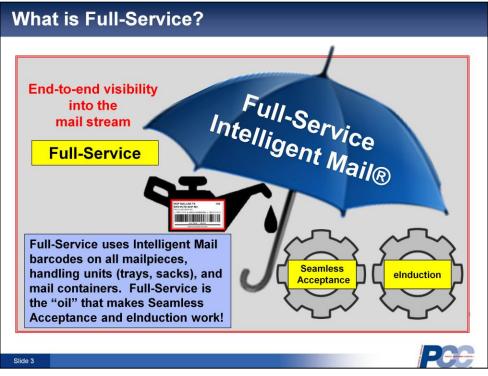For Small Businesses

September 2016

[VO]: The Intelligent Mail barcode is transforming the entire mail supply chain in new and exciting ways. If you are currently entering mail without this transformative technology or are only creating the basic IMb, you are missing out on tremendous opportunities to grow your business, reduce your postage, and improve the value of your mail.

Fortunately, the path to Full Service Intelligent Mail barcodes is now easier than ever before! In fact, the path is as easy as 1, 2, 3!
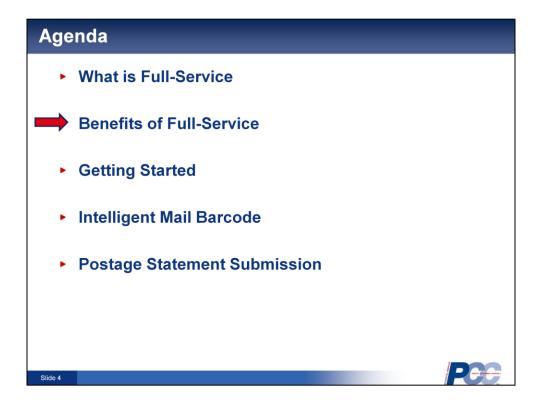
[VO]: The Full-Service Program is one of the key Mail Entry initiatives to streamline the acceptance, induction and verification of commercial mailings. Today we will provide you with the benefits of becoming a Full-Service mailer and how you can participate in Full Service.

What is Full-Service?

End-to-end visibility into the mail stream

Full-Service

Full-Service Intelligent Mail®

Full-Service uses Intelligent Mail barcodes on all mailpieces, handling units (trays, sacks), and mail containers. Full-Service is the "oil" that makes Seamless Acceptance and eInduction work!

Seamless Acceptance

eInduction

Slide 3

[VO]: Full-Service sets the stage for the streamlined acceptance of commercial mailings. By submitting mailings as Full-Service both the USPS and the mailer benefit from achieving end to end visibility into the mailpieces as they move from acceptance into processing.

When mailers prepare the electronic documentation or eDoc for a mailing it includes the identification of who is the mail preparer and who is the mail owner - known as the By/For information. *Full Service mailings will enable the Postal Service to perform automated verification through streamlining the entry of mail.* The verification results are populated in the Mailer Scorecard.

Unique thresholds have been set for each eDoc verification. If a mailer exceeds any of these established thresholds, they may be subject to an assessment which results in the removal of the Full-Service per piece discount for each piece exceeding the threshold.
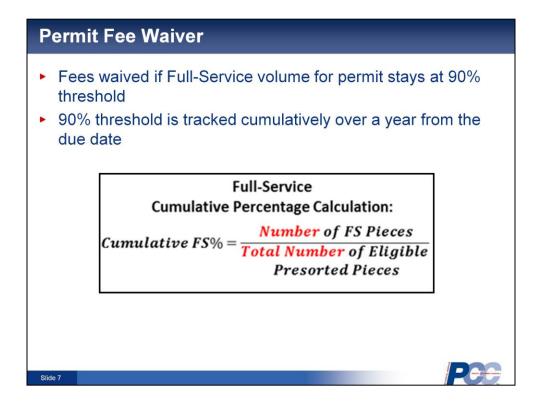
3

[VO]: Now let's review the benefits of Full-Service.

Benefits of Full-Service

- **Savings with Full-Service**
  - Per piece discounts
- **Permit Fee Waiver**
  - Additional annual savings
- **Free Address Correction Service**
  - More savings and improved address quality
- **Mail Anywhere Participation**
  - One permit to mail at any USPS entry site – more savings
- **Promotion and Incentive Programs**
- **Mailpiece and Container Tracking**
  - Visibility and predictability of USPS mail delivery
- **Expedited Mail Acceptance**
  - Saves time and effort at the BEMU

Slide 5

[VO]: Full-Service provides numerous benefits and value for the mailer, which include: an additional per-piece discount, and the waiver of the annual presort mailing fee. Full Service mailers are also able to receive free address correction on Full-Service mailpieces and may participate in the Mail Anywhere program. They can also receive additional discounts or credits from some of our promotion and incentive programs. Another mailer benefit of Full-Service is the feedback that is provided on mail quality and preparation. Full-Service mailers gain visibility into mailings with Start-the-Clock and tracking by utilizing barcode scan data. Full-Service keeps mail relevant in a technology-driven marketplace by encouraging mailers to use digitally enhanced direct mailpieces. And finally the Postal service and the Full Service mailer benefit from overall improvement of mail quality as electronic mail quality reports are provided to the mailer; allowing mail owners and/or preparers to improve quality for future mailings.

Savings with Full-Service

Savings with Full-Service	
Per Piece Discount – First-Class	$0.003
Per Piece Discount – Other Classes	$0.001
8125 Elimination (Requires eInduction)	$0.06 per printed page + reduced man-hours
ACS Fees Savings	$0.05 per piece (FCM) $0.12 per piece (STD)
Permit Fee Elimination	$225 per permit

[VO]: When mailing Full-Service you will receive additional per piece discount on automation mailings for First-Class Mail postcards, letters and flats, Standard Mail letters and flats, Periodicals letters and flats, and Bound Printed Matter flats. This table shows the savings for various mail classes and services.

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▸ Fees waived if Full-Service volume for permit stays at 90% threshold

▸ 90% threshold is tracked cumulatively over a year from the due date

Full-Service
Cumulative Percentage Calculation:

$$Cumulative\ FS\% = \frac{Number\ of\ FS\ Pieces}{Total\ Number\ of\ Eligible\ Presorted\ Pieces}$$

Slide 7

[VO]: Now let's review how the 90% Full-Service fee waiver works. At the office of permit, the customer's annual presort fee is waived provided the mailer's Full-Service volume for that permit stays at 90% or better. The 90% threshold will be tracked cumulatively over a yearlong time period. Each yearlong cumulative period starts with the first mailing after the initial permit due date. If the permit continues to hold at least a 90% Full-Service ratio, the annual fee will continue to be waived. If the permit no longer holds at least a 90% Full-Service ratio, the annual fee will be required immediately. Here is how the 90% Full-Service fee waiver works.

The waiver of the annual presort fee is a Full-Service benefit. The customer's annual presort fee is waived, provided the mailer's cumulative Full-Service volume for that permit, stays at 90% or better.

- The 90% cumulative threshold is tracked over a yearlong time period.
- The cumulative period starts over on each presort fee anniversary date and runs forward for one year.
- The following year, when the next fee anniversary date is reached, the cumulative starts over again.
- This results in the Full-Service % being reset to zero each year on the fee anniversary date.
- The first mailing after the annual presort fee anniversary date establishes the new cumulative percentage. Think of the annual permit fee anniversary date

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and cumulative period as partners. They cover the same time period.

[VO]: The Address Correction Service or ACS is an on-piece address correction service that helps to identify if the addressee has moved. It is used in conjunction with ancillary service endorsements so mail can reach the proper destination. ACS is ideal for those who maintain addressee records on computers. ACS mailers configure mailing address labels, envelopes, and address blocks to comply with ACS participation requirements, and may develop their own matching software to update their mailing list. There is no formal contract or service charge associated with using ACS. Fees are based on the number of change of address (COA) and nixie (mail that is undeliverable for reasons other than a move) notices provided to the ACS customer.

[VO]: The Mail Anywhere program allows Full-Service mailers to use a single permit and centralized account to enter and pay for all mailings across the country.

Entry into the Mail Anywhere program is open to mailers who are mailing via Full-Service standards. Once the mailer is approved for participation in the Mail Anywhere program, failing to meet the Full-Service thresholds will not impact eligibility for Mail Anywhere. To be authorized for Mail Anywhere, a customer must meet the criteria for the month prior to their request.

IMb Tracing for Visibility and Predictable Delivery

- ► Obtain near-real-time notification from mail processing scans
- ► Identify delivery trends and ensure delivery meets in-home dates
- ► Know when your message reached your audience so you can synchronize multichannel marketing
- ► Enable fulfillment, staffing and inventory planning based on mail delivery

IMb Tracing®

IMb Tracing is a FREE service that provides real-time tracking information for your automation-compatible letters and flats.

For more information visit:
https://ribbs.usps.gov/confirm/documents/tech_guides/IMb_TracingFactSheet.pdf

Slide 10

[VO]: IMb Tracing is a service that provides near real-time tracking information for your automation-compatible letters and flats, giving advance notice for both incoming and outgoing mail. This service helps small businesses track important or time-sensitive mail, such as direct mailpieces, catalogs, checks, and statements.

The IMb Tracing scan data is available free for your Full Service IMb mailings. Third party vendors can help you sort through IMb Tracing information and develop a plan that works for your business.

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Informed Visibility Report Container/Tray Visibility

► Powerful dashboards to answer the question …

"Where is my mail?"

Slide 11

[VO]: Informed Visibility data allows mailers to view scans as containers and trays are moved through the USPS mail stream. Scan events are captured as USPS accepts and processes mail that includes IMcb (Intelligent Mail container barcode) or IMtb (Intelligent Mail tray barcode). Mailers can use scan data to anticipate when their mail will be delivered or if issues are encountered during processing. The anticipated delivery information can help mailers make decisions such as call center staffing levels.

Full-Service container scan data is available in an online report or through electronic data interchange in XML format.

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[VO]: Now that you have a general understanding of Full-Service let's review the simple steps you should take to get started.

Are You Ready to Get Started?

▸ Full-Service Intelligent Mail barcodes are as easy as …

Step 1: Obtain your MID and CRID using the Business Customer Gateway

Step 2: Generate the IMb for pieces and containers

Step 3: Create Electronic Documentation

Slide 13

[VO]: In three easy steps you can mail using intelligent mail barcodes.

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[VO]: First, let's get you to the Business Customer Gateway. Go to the USPS homepage. Scroll down to the bottom of the page and under "Other USPS Sites," click on Business Customer Gateway. There, you will see where you login with your username and password. If you are new, click on "Register for free."

[VO]: First, obtain your Mailed I-D, or "MID" or Customer Registration I-D, or CRID, using the Business Customer Gateway, known as the B-C-G.

[VO]: It is necessary to create your *USPS.com* come Business Account on the Business Customer Gateway.

[VO]: Enter your name and contact information.

[VO]: Find The correct address for your company.

[VO]: Click the "Create account" button.

[VO]: Now you are registered on the BCG.

[VO]: USPS will now assign a Mailer ID.

Step 1: Link Your Permits

Go to "**Manage Permits**" under "**Mailing Services**."	Manage Permits (PostalOne!) The PostalOne! system allows management
Customers will select their Business Name by clicking the link in the '**Name**' column. You will go to the page shown below.	
Scroll to the bottom and select the "**Permit Validation**" tab.	

Slide 22

[VO]: Customers must link their permit for the tool to work. The customer must go to Manage permits under mailing service. The customer business name will be displayed as a "blue hyperlink" under the name column. After clicking on hyperlink, the customer will be taken to the business location page to enter the required information located under the third tab titled "PERMIT VALIDATION".

Step 1: Link Your Permits, Cont.

Enter the Permit Number, Permit Type, Post Office of Mailing ZIP code (5 digit) and enter the amount of one of the last 10 transactions on this account.

Example: For a fee payment of $200.00, enter 200.00 or the exact amount they paid.

Customers will enter their permit information and click '**Validate**'. Once linked, the permit information will be available to them within the IMsb application.

If the permit does not link- call the help desk(800) 522-9085 option 3.
or your local IMsb Ambassador. Ask them to LINK THE PERMIT.

This is a one time process and ONLY the Business Service Administrator of the account can link the permit.

Slide 23

[VO]: Enter the permit number and type. Enter the BMEU ZIP code, not the customers ZIP. Enter the amount of one of the last 10 transactions.

Note: If linking a new Precanceled or Metered customers account, it will be possible not to have a transaction.   When this occurs, contact the *PostalOne!* help desk *(800) 522-9085 option 3* or your local Ambassador and ask them to link the permit. A list of Ambassador is located on the BMA page. The IMsb folder will be displayed under Intelligent Mail link. This is a one time process and only the Business Service Administrator, or the B-S-A of the account can link the permit.

Step 2: Generate the Intelligent Mail barcode

▸ Are you using USPS CASS and PAVE certified software?

YES	NO
You are done with Step 1	Consider a Cloud-Based Tool

▸ A list of certified software vendors is posted on http://ribbs.usps.gov

▸ USPS has an Intelligent Mail small business (IMsb Tool) available through the Business Customer Gateway

Slide 24

[VO]: If you are currently using on premise USPS CASS and PAVE certified software then you are DONE with step 1. Your USPS certified software most likely already produces the Full Service Intelligent Mail barcode. If you are not sure how to turn this feature on, contact your software provider's customer support and they can show you how to turn this feature on.

If you are not using USPS CASS and PAVE software then perhaps a Cloud-Based Tool may be an option for your small business. Cloud-Based software provides an easy, affordable solution to prepare mailings without having software installed at your location. Access is typically done using a web browser with your mailing list being uploaded and processed on the vendor's remote computer server. Both the mailing industry and the USPS offer cloud-based solutions. A list of certified software vendors is posted on http:***beta.postalpro.usps.com.***with options for affordable on premise and cloud-based solutions and the USPS has an Intelligent Mail small business (IMsb Tool) available through the Business Customer Gateway.

[VO]: Now that we've selected an appropriate Full Service Intelligent Mail solution for our small business, let's look at creating the Full Service Intelligent Mail barcode.

Intelligent Mail® Piece Barcode Data Construct

▶ Mailers are required to place unique Intelligent Mail Barcodes on all mailpieces, trays/sacks, containers/pallets

▶ Barcodes cannot be reused for at least 45 days

Components of an IMb required for all Full-Service mailpieces

Barcode ID	Service Type	Mailer ID	Serial Number	Routing Code
Ex: "00" for Mixed AADC	Ex: "314" for First Class Mail	Ex: "123456" USPS assigned	Ex: "200890001" Mailer assigned	Ex: 6449 Amberview Ct., Memphis, TN 38141834649

✓ Barcode ID with Optional Endorsement Line
✓ Service Type
✓ Mailer ID
✓ Serial Number
✓ Delivery Point ZIP™ Code (Routing Code)

Slide 26

[VO]: The required components of the Intelligent Mail Barcode are broken down on this slide. From left to right, they are:

- **Barcode ID:** This field is the first segment of the barcode and is a 2-digit field that is reserved to encode the presort identification that is currently printed in human readable form on the optional endorsement line (OEL)

- **Service Type ID:** or STID, represents the next 3 digits in the barcode; the STID provides information on the mail class, address correction service (if any), whether the mailing is Full-Service or Basic/Automation, and IMb tracing (if desired).

- **Mailer ID:** or MID, is a unique 6 or 9-digit number issued by USPS that identifies the mail owner or mailing agent six-digit MIDs are assigned to Mail Owners or Mail Service Providers whose annual volume is greater than 10 million pieces, whereas nine-digit MIDs are assigned to Mail Owners or Mail Service Providers whose annual volume is less than 10 million pieces

- **Serial Number:** Is a unique numeric sequence, determined by the mailer, critical for Full Service compliance and for mail piece tracing.: (together the MID and the serial Number segments total 15 numeric digits in the IMb. --for six digit MID, the serial number is a nine-digit code. If the barcode has a nine digit MID, the serial number will be a six digit code.

- **Routing Code:** is an eleven-digit Delivery Point ZIP code

Intelligent Mail Guides and Technical Specifications

https://ribbs.usps.gov/index.cfm?page=intellmailguides

Together the *Mailer ID, Serial Number and class identified in the Service Type ID (STID)* determine barcode uniqueness.

Intelligent Mail® Tray (IMtb) Barcode Requirements

▸ Components of an Intelligent Mail Tray Barcode (IMtb) are required for all Full-Service trays/tubs/sacks

ZIP™ Code	Content Identification Number (CIN)	Processing Code	Mailer ID	Serial Number	Label Type
Ex: Memphis, TN "38141"	3-digits describing the tray	Ex: "1" for Automation Compatible	Ex: "123456" USPS Assigned	Ex:"200890001" Mailer Assigned	Ex: "1" for 6-digit MID

Slide 27

[VO]: Displayed here, are the components of the Intelligent Mail Tray barcode required for all full service handling units. Let's take a look at the different segments the Intelligent Mail tray barcode.
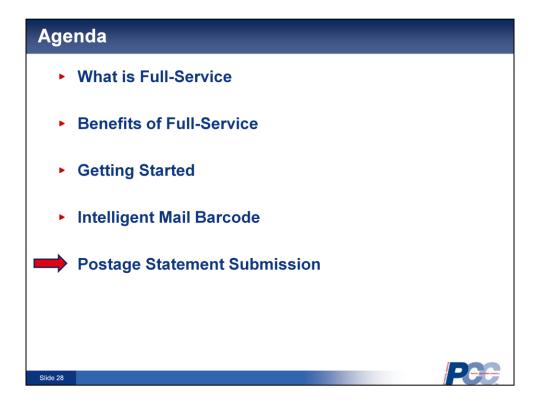
The tray barcode has 24-digits, and while it resembles the Intelligent Mail barcode, there are some distinctions to point out. The first field is the five-digit ZIP™ Code, which identifies the tray or sack's ZIP™ Code destination. Next is the Content Identification Number, or CIN which describes the contents of the tray or sack based on the 3-digit Content Identifier Numbers listed in the DMM. The third field is the one-digit Processing Code, which can only be one of two values: The number "1" is used for Automation Compatible, Barcoded, and Machinable Mail. The number "7" is used for all other mail.

The next two fields are the Mailer ID and the Serial Number which just as in the IMb for mailpieces this is a unique 6 or 9-digit number, depending upon the Mailer ID length. This field is used to uniquely number your Intelligent Mail Tray barcodes. The final field in the Intelligent Mail tray barcode is the one-digit Label Type, which is used as a qualifier for systems to recognize the data within this barcode. It has two acceptable values, 1 or 8, which are dependent on the Mailer ID length.

This collective information expands the amount of data stored over the former tray barcode, which only contained delivery destination information. Again, under the Full-Service option, mailers are required to use a unique Intelligent Mail tray barcode on the Intelligent Mail tray label applied to trays or sacks and keep this number unique for 45 days.

However, the same rule for mailings containing fewer than 10,000 pieces applies to tray labels: for Mailings less than 10,000 pieces, mailers may use identical Serial Numbers within a single mailing but must maintain uniqueness across mailings for 45 days. This can only apply if all mailpieces are identical weight and separated by price or if postage is affixed to the piece at the correct price.

https://ribbs.usps.gov/index.cfm?page=intellmailtraylabel

[VO]: Now we will discuss submitting postage statements using Electronic Documents, or eDoc's.

What is Electronic Documentation?

► Electronic versions of postal reports
- Postage Statements
- Qualification Reports
- Other documentation

► Information uploaded to *PostalOne!*®

► Replaces printed documentation

Slide 29

[VO]: Electronic documentation, or e-Doc is electronic versions of postal reports. These include postage statements, qualification reports, or other documentation used to process business mail. The information is uploaded to *PostalOne!* and replaces printed documentation.

Three Paths to Submit eDoc

▶ An eDoc is required for all Full-Service Mailings

▶ Three ways that mailers can submit electronic documentation:

Mail.dat	Mail.XML	Postal Wizard
• Mailer uses own software or vendor software to create electronic file • Mail.dat is an electronic file that represents the mailing and contains the Postage Statement and qualification information • Mail.dat uses a fixed file format to send mailing information	• Mailer uses own software or vendor software to create electronic file • Mail.XML is an electronic message that represents the mailing and contains the Postage Statement and qualification information • Allows two-way conversational communication letting the customer select and correct data fields submitted	• Mailer types information into online forms in Postal Wizard, a USPS tool • Postal Wizard creates the electronic postage statement • Separate software is needed to generate barcodes • Link: http://gateway.usps.com

Slide 30

[VO]: An eDoc is required for all Full-Service Mailings. There are 3 ways that mailers can submit eDoc's to the Postal Service.

First they can use Mail dot dat. To submit an edoc, a mailer uses their own software, or a vendor's software to create an electronic file. *Mail. dat* is an electronic file that represents the mailing and contains the postage statement and qualification information. *Mail.dat* uses a fixed file format to send mailing information to the Postal Service.
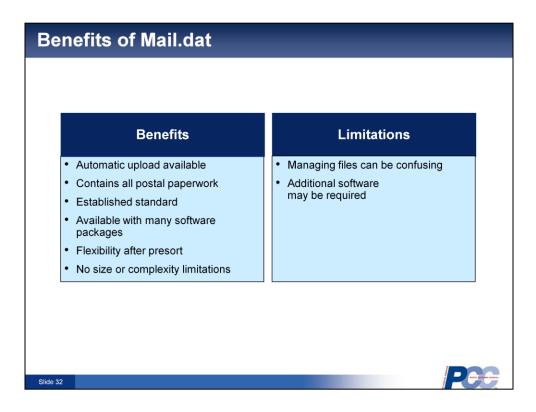
The 2nd way to submit an eDoc is through *Mail. XML*. Again in this scenario, the mailer will use their own software or a vendor's software to create an electronic file that represents the mailing and contains Postage statement and other qualifying information. This file format allows two way conversational communication between the mailer and the Postal Service to let the customer select and correct data fields submitted.

The 3rd way to submit an eDoc is using the Postal Wizard. In this scenario, the mailer types information into online forms using the Postal Wizard, which is a US Postal Service tool. The Postal Wizard creates the electronic postage statement. Separate software is required to generate the barcodes for the mailing. More information about the Postal Wizard can be found at the Business Customer Gateway website, which is *gateway.usps. com*

A list of certified vendors for these file formats will be discussed on the next slide.

[VO]: A list of certified software vendors can be found on the RIBBS website, under Certifications, eDoc and Full-Service, Certified FS Vendor Summary list. Or through the hyperlink on this page to the Certified Vendors List.

Benefits of Mail.dat

Benefits	Limitations
• Automatic upload available • Contains all postal paperwork • Established standard • Available with many software packages • Flexibility after presort • No size or complexity limitations	• Managing files can be confusing • Additional software may be required

[VO]: As we discussed, eDocs can be developed using *Mail.dat* and there are several benefits to using this format.

First, eDocs will be automatically created and uploaded by your pre-sort software and contain all the needed data for the mailing, except addresses.

Mail dot dat is an established standard that is available with many software packages. The file is uploaded to *PostalOne!* to expedite postage payment. It is important to check with your current software provider to make sure they are using the current version, but there are no size or complexity limits to using it.

Benefits of Mail.XML

Benefits	Limitations
• Contains all postal paperwork • Automated processing available • No files to keep track of • Additional services (FAST®, data retrieval) available • No size or complexity limitations	• Additional software may be required • Not available from all vendors

[VO]: There are also several benefits to using *Mail.XML. Mail.XML* contains all of the data for a mailing and it is an automated process. There are no files to keep track of and there are additional services available, such as FAST or data retrieval. There are no size or complexity limitations to using this format. Mailers should check with their current software provider to make sure they are using the current version.

The limits are that additional software may be required and it is not available from all vendors.

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Benefits of the Postal Wizard

Benefits	Limitations
• Easy to use	• Requires manual entry
• No additional software	• No entry automation available
• No additional files	• 10k limit for Full-Service mailings
• Available for simple mailings	• Replicates postage statement only
	• Non-automation pieces must be on separate statement

Slide 34

[VO]: The third way to submit eDocs is through the US Postal Service Postal Wizard, which is an online tool. Postage Statements can be entered directly into the tool, making it easy to use, there is no additional software or additional files needed. It can be used for simple mailings, as information is manually entered into the system. Manual entry is both a benefit and a limit depending on the mailing.

Some other limits are that no entry automation is available, there is a 10,000 piece limit for Full-Service mailings. It will replicate postage statements only, and non-automation pieces must be on a separate statement.

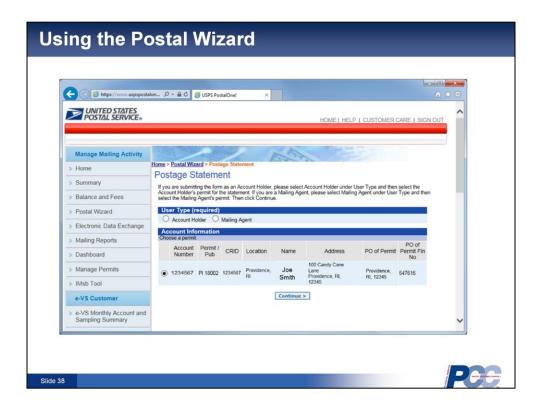We will go through an example on the following pages.

Agenda

- ▶ **What is Full-Service**
- ▶ **Benefits of Full-Service**
- ▶ **Getting Started**
- ▶ **Intelligent Mail Barcode**
- ▶ **Electronic Document**
- ➡ **Postal Wizard**

Slide 35

[VO]: The following slides demonstrate how to manually submit postage documentation for small mailings using the Postal Wizard.

Business Customer Gateway – Postal Wizard

Slide 36

[VO]: To use the Postal Wizard Mailers will need to have an active account in the Business Customer Gateway. Once logged in, go to the Postal Wizard link along the right side of the screen.
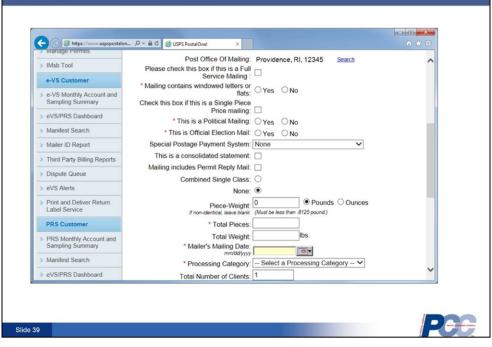
Using the Postal Wizard

[VO]: Then click on the postage statement you will be using for the mailing.

[VO]: Once the correct postage statement comes up, click on the correct account number and then click "continue".

[VO]: You will enter the details of the mailing into the online postage statement.

Which eDoc Method is Right for You?

	Postal Wizard	Mail.dat	Mail.XML
Eligible for Full-Service discounts	✓	✓	✓
Replaces postage statement	✓	✓	✓
Replaces all postal paperwork		✓	✓
Good for simple mailings	✓	✓	✓
Good for all mailings		✓	✓
Internet-based transmission	✓		✓
File-based transmission		✓	
Automated submission available		✓	✓
Software required		✓	✓

Slide 40

[VO]: This chart provides a high level overview to help determine which eDoc method is best suited for you. As you can see all three formats are eligible for Full-Service discounts and replace postage statements.

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Final Step Through Questions

‣ **If you are using USPS certified software now**
  ▪ Check with your software provider to turn on Full-Service IMb
    • A list of certified software vendors is posted on https://beta.postalpro.usps.gov/
  ▪ Ask about the supported eDoc methods

‣ **If you currently hand-sort your mail and manually produce USPS postage statements**
  ▪ Consider a low-cost desktop solution or an online cloud-based solution
    • Search the Internet for "Direct Mail Software" or "Cloud-based Presort"
  ▪ Visit the USPS Business Customer Gateway for the
    • Postal Wizard
    • IMsb Tool

Slide 41

[VO]: If you are already using USPS certified software now, check with your software provider to turn on the Full-Service Intelligent Mail barcode feature. Again, a list of certified software vendors can be found on the RIBBS website at ribbs dot usps dot gov. You can also ask your software provider about which eDoc methods they support.

If you currently hand sort your mail and manually produce your postage statements, you may want to consider an affordable on premise desktop solution or an online cloud based solution. Search the internet for "Direct Mail software" or "cloud based presort". You can also visit the USPS Business Customer Gateway for the Postal Wizard, the Intelligent Mail Small Business tool, or for a wealth of other information for and about business mail.

[VO]: There is a Full-Service Intelligent Mail Fact Sheet available on the *PostalPro* website as well. Go to the *PostalPro* website, then search on "Full-Service Intelligent Mail Fact Sheet".

Questions?