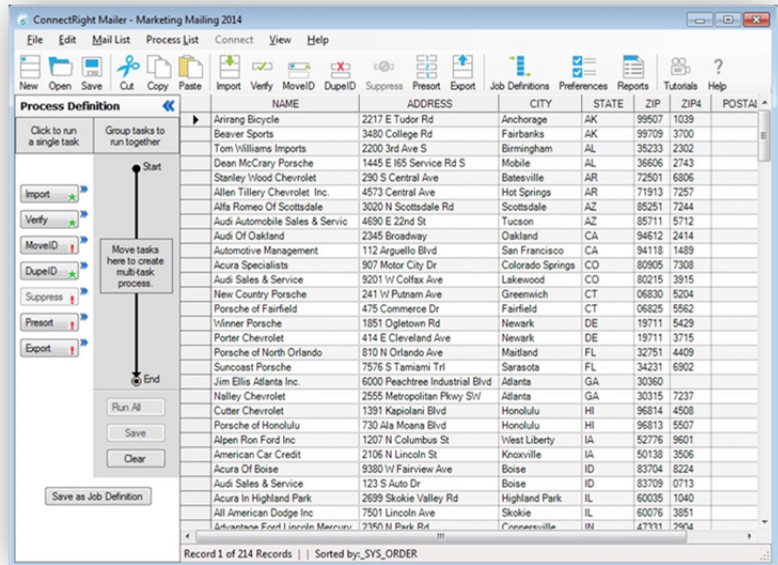


**Objective:** To sort your mail list in ConnectRight Mailer in order to meet USPS® standards.

|  | Comment | ACTION – DO THIS |
|--|---------|------------------|
|--|---------|------------------|

1

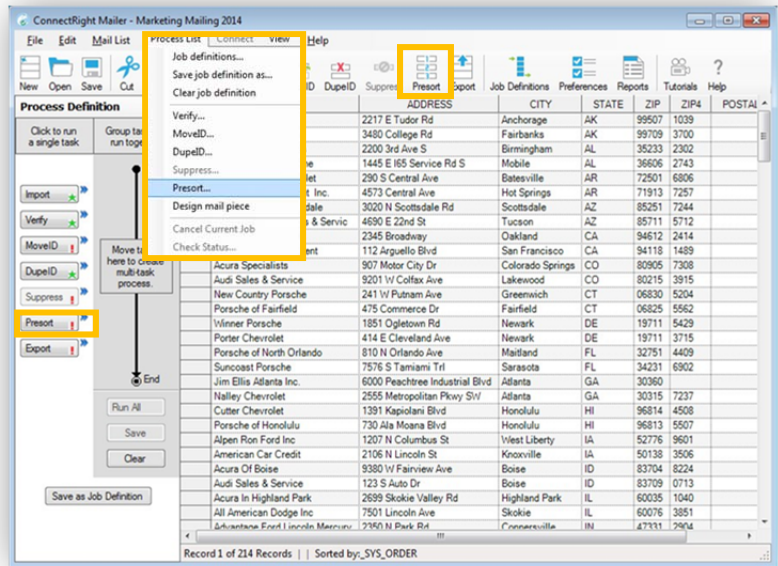
ConnectRight Mailer will enable you to sort your mail list to meet USPS® standards.



2

Begin by selecting the **Presort** option from one of the following locations:

- The **Process Definition** menu,
- The **Presort** icon on the tool bar, or
- The **Presort** option in the **Process List** menu

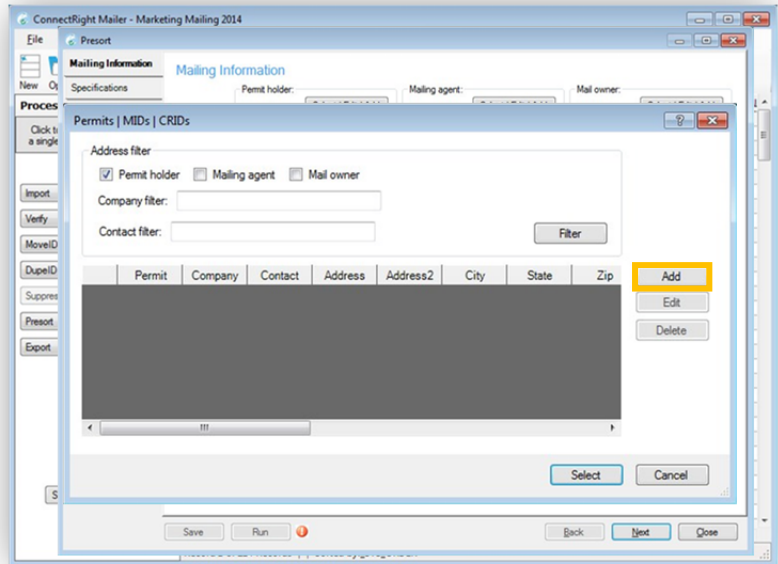




## ConnectRight™ Mailer Address Presorting

Click **Add** to enter new mailing information.

5

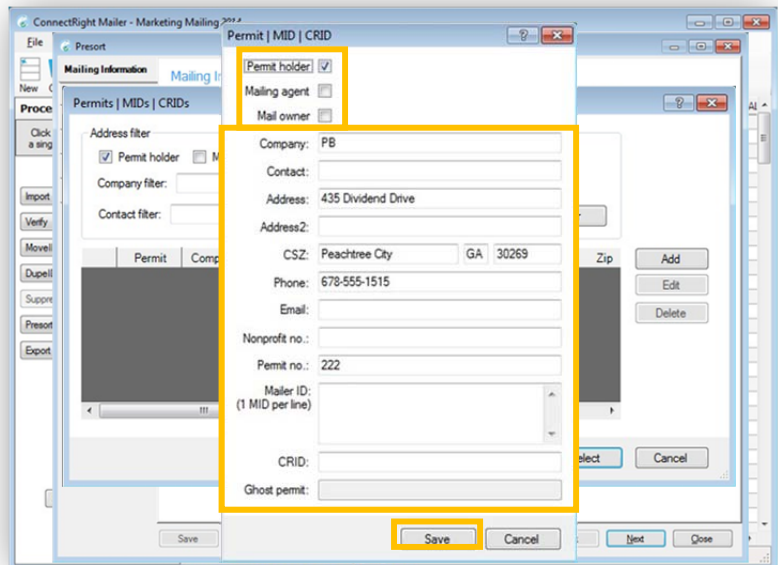


Fill in the **Permit | MID | CRID** information.

Click the check box(es) to indicate whether it is for **Permit holder**, **Mailing agent**, and/or **Mail owner** mailings.

Click **Save** when all information has been entered.

6



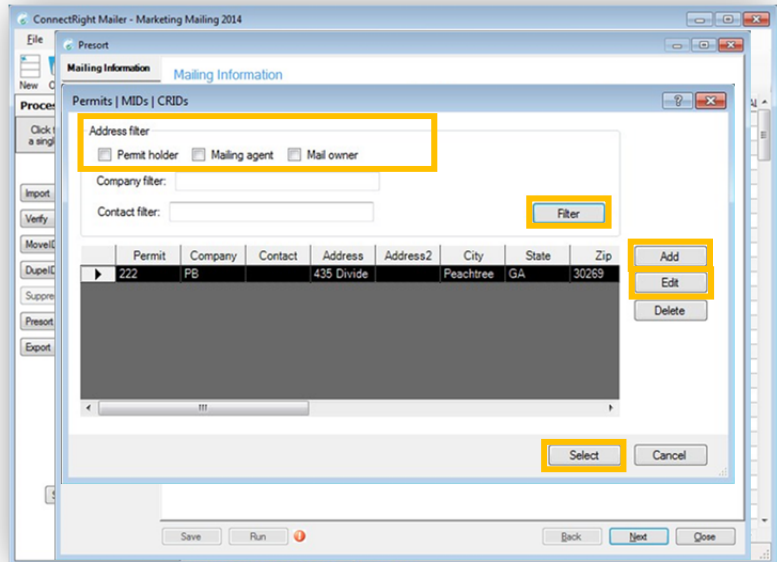
## ConnectRight™ Mailer Address Presorting

The new record is now available for use.

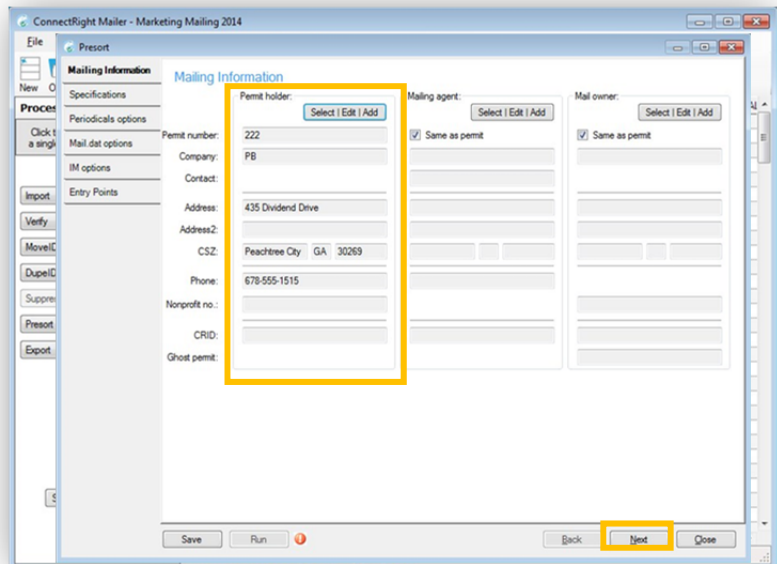
**NOTE:** if the record does not appear in the list, the address filter may be preventing it from displaying.

To remove the address filter, click the **Address filter** check boxes and then click the **Filter** button.

To add other **Permits |MIDs | CRIDs**, click **Add**. If you need to modify any of the mailing information, select the record and click **Edit**. When complete, click the **Select** button to continue.



If the mailing information is correct, click **Next** to access the **Presort Specifications** screen.



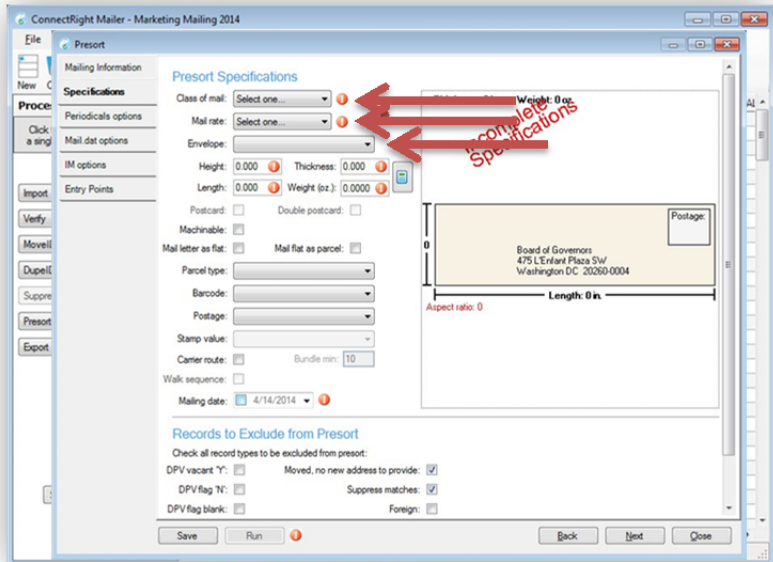
# ConnectRight™ Mailer Address Presorting

9

On the **Presort Specifications** screen, you will tell ConnectRight Mailer about your mailing.

Choose the following information:

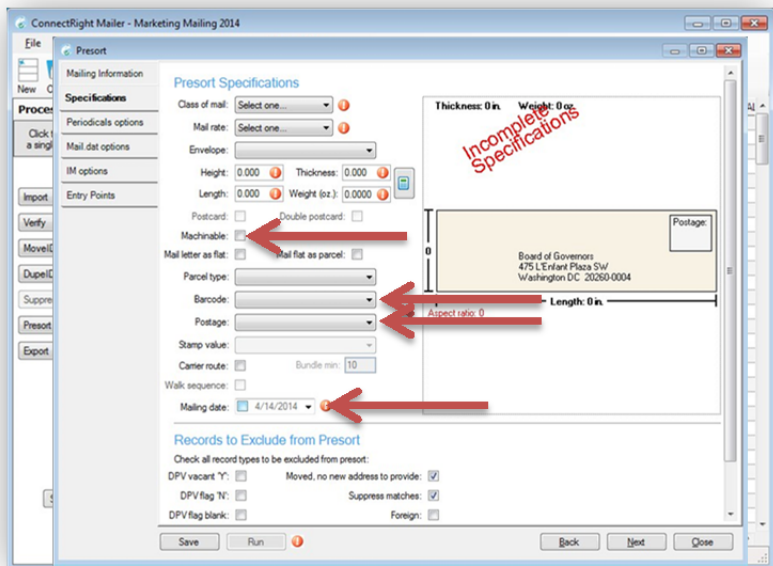
- Class of Mail
- Mail Rate
- Envelope Size and Weight



10

You will also let ConnectRight Mailer know:

- If your item is Machinable
- If you are using an IMb
- How you will be paying for postage
- The date you will be taking your mailing to the USPS



## ConnectRight™ Mailer Address Presorting

Finally, you can let ConnectRight Mailer know if there are any records you do not want to include in your mailing.

ConnectRight Mailer will automatically exclude records which have moved and have no forwarding address, as well as duplicate records.

However, you can add other selections such as foreign addresses.

Select **Next** when you have completed all of the **Presort Specifications**.

ConnectRight Mailer - Marketing Mailing 2014

File Presort

Mailing Information

Specifications

Class of mail: Select one...  
Mail rate: Select one...  
Envelope: [Dropdown]  
Height: 0.000 Thickness: 0.000  
Length: 0.000 Weight (oz.): 0.0000  
Postcard: [ ] Double postcard: [ ]  
Machinable: [ ]  
Mail letter as flat: [ ] Mail flat as parcel: [ ]  
Parcel type: [Dropdown]  
Barcode: [Dropdown]  
Postage: [Dropdown]  
Stamp value: [Dropdown]  
Bundle min: 10  
Mailing date: 4/14/2014

Records to Exclude from Presort  
Check all record types to be excluded from presort:  
DPV vacant \*Y: [ ] Moved, no new address to provide: [x]  
DPV flag \*N: [ ] Suppress matches: [x]  
DPV flag blank: [ ] Foreign: [ ]

Board of Governors  
475 L'Enfant Plaza SW  
Washington DC 20260-0004

Thickness: 0 in. Weight: 0 oz.  
Length: 0 in. Aspect ratio: 0

Save Run Back Next Close

11

The **Mail.dat Options** screen will display. Mail.dat is the format ConnectRight Mailer uses to send information to the USPS regarding your mailing.

Begin by selecting the **Create Mail.dat** check box.

ConnectRight Mailer - Marketing Mailing 2014

File Presort

Mailing Information

Specifications

Mail.dat options

Create Mail.dat [x]

Job number: [Text]  
Customer Reference ID: [Text]  
Name: [Text]  
Phone: [Text]  
eDoc sender CRID: [Text]  
USPS pickup: [Dropdown]  
Postage payment option: [Dropdown]  
Piece weight source: [Dropdown]

Save Run Back Next Close

12

Enter the following information:

**Job number:** Unique reference ID for PostalOne! submission.

**Customer Reference ID:** A reference number for the CAPS account statement.

**Name:** Contact person for the Mail.dat file.

**Phone:** Contact phone number for the Mail.dat file.

**eDoc Sender CRID:** USPS-assigned CRID (identifies the company uploading the Mail.dat file). ConnectRight Mailer will fill this in for you.

**USPS pick-up:** Check this box for mailings verified at a USPS "DMU" (Detached mail unit).

**Postage payment options:** Payment method provided to the USPS.

**Piece weight source:** Method used to calculate the piece weight for the mailing.

When the **Mail.dat Options** are complete, click **Next** to continue.

The screenshot shows the 'Mail.dat Options' dialog box in the ConnectRight Mailer software. The dialog box contains the following fields and options:

- Job number: 12345
- Customer Reference ID: 22565
- Name: Lotta Mayle
- Phone: 6785551515
- eDoc sender CRID: 1234567
- USPS pickup:
- Postage payment option: Other
- Piece weight source: Calculated with formula

Red arrows point to the USPS pickup checkbox, the Postage payment option dropdown, and the Piece weight source dropdown. The 'Next' button at the bottom right is highlighted in yellow.

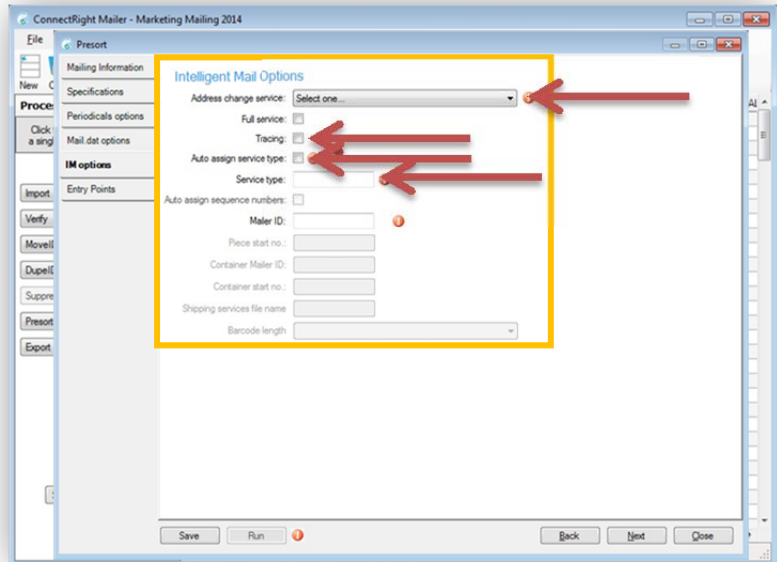
The **Intelligent Mail Options** screen will display. This is where you tell ConnectRight Mailer which IMb services you would like to use. Select/Enter the following:

**Address change service:** Indicates which address correction service (ACS) method will be used for the mailing. This information is used to calculate the appropriate service type.

**Tracing:** Check this box when using IMb Tracing from the USPS® or a mail tracking solution. This information is used to calculate the appropriate service type.

**Auto assign service type:** Check this box to calculate the service type for the presort. If not checked, the user must specify the service type. This option is not available for IMpb presorts.

**Service type:** A three digit number used as part of the Intelligent Mail barcode. For most categories, the application will generate the service type ID. If the Service Type ID is not automatically calculated, consult appropriate USPS documentation to determine the correct service type ID.





**Auto assign sequence numbers:** For Full-Service mailings, unique piece and container serial numbers can be generated by the application. If this box is not checked, then unique serial numbers must be specified by the user. The application only tracks unique serial numbers for presorts using the Auto assign sequence number functionality.

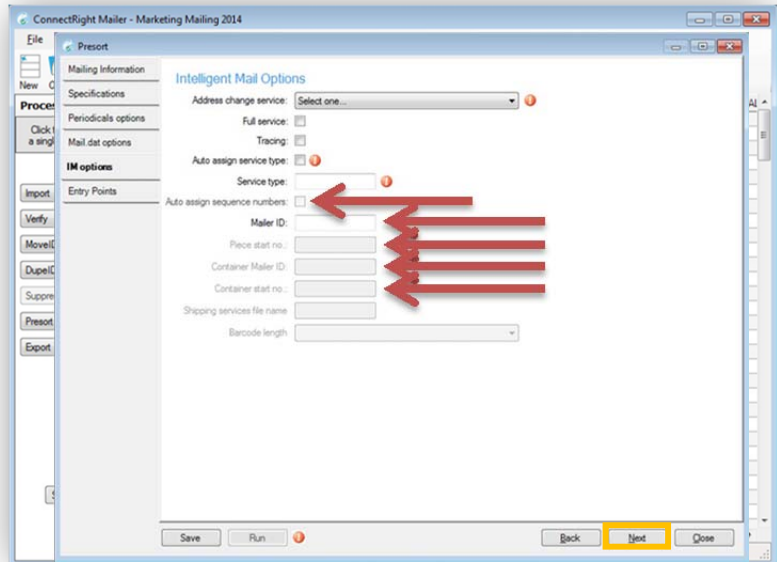
**Mailer ID:** The 6 or 9 digit Intelligent Mailer ID assigned by the USPS.

15 **Piece start no:** Starting piece number to use for the mailing if "Auto assign sequence numbers" is unchecked.

**Container Mailer ID:** The 6 or 9 digit container Intelligent Mailer ID assigned by the USPS.

**Container start no:** Starting container number to use for the mailing if 'Auto assign sequence numbers' is unchecked.

When the **Intelligent Mail Options** are complete, click **Next** to continue.

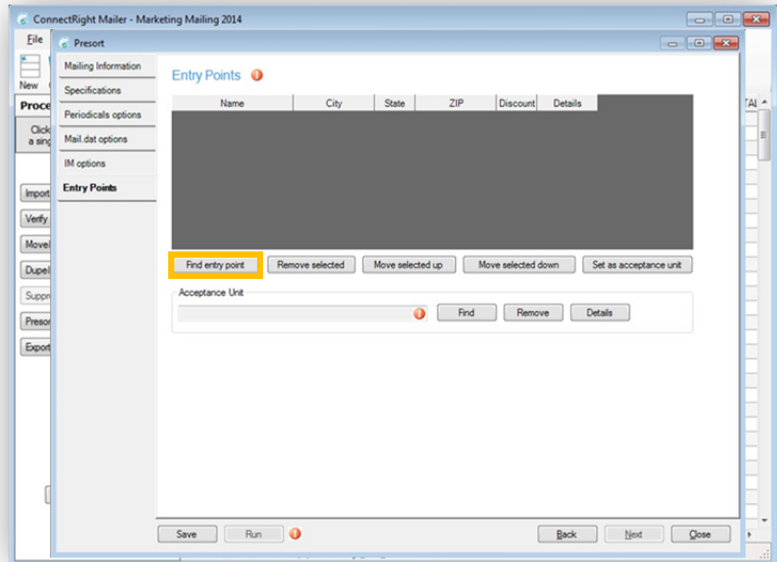


## ConnectRight™ Mailer Address Presorting

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The 'Entry Points' screen will display. Information entered in this screen will let the USPS know where you are dropping your mail off, help calculate the correct postage, and make certain your reports get to the appropriate USPS location.

Select **Find entry point**.

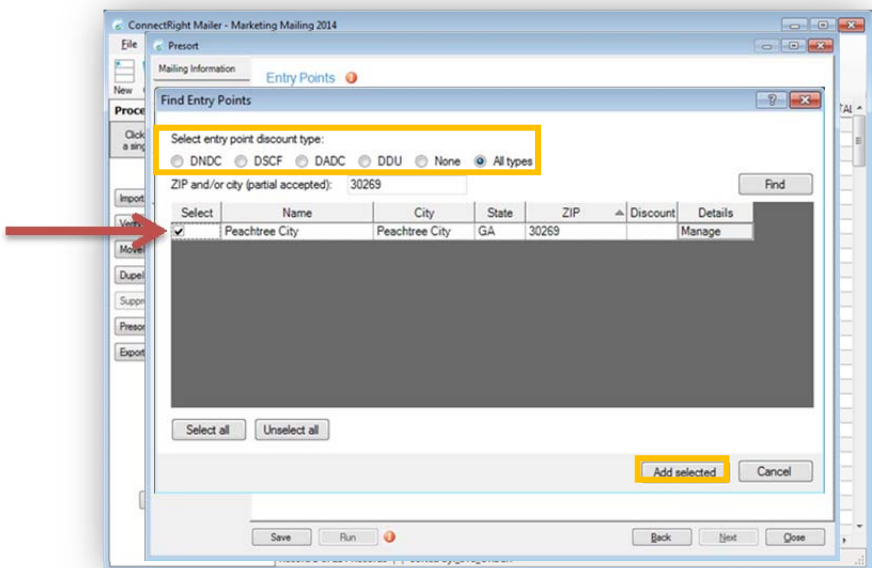


17

ConnectRight Mailer will determine which USPS facility is closest to you and display the location.

Select the displayed location(s), and choose the entry point discount levels you will be taking. Click **Add selected**

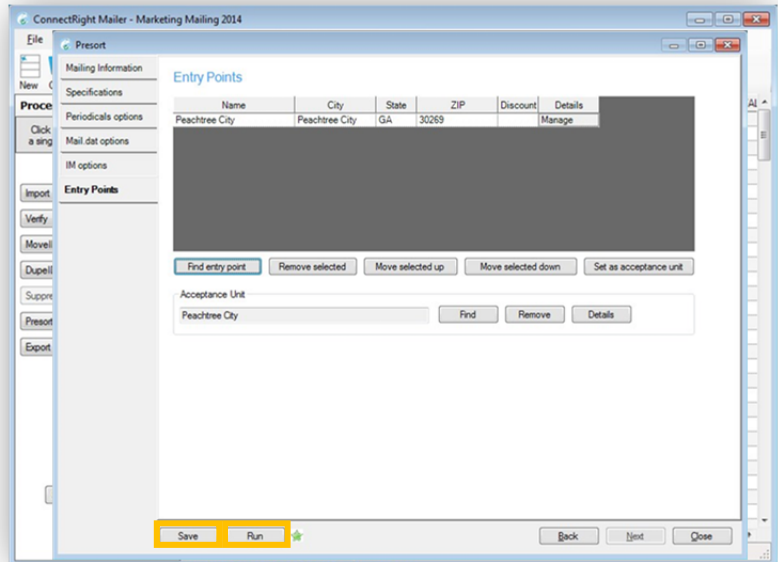
**Important Note:** If you are entering mail at multiple entry points and are unfamiliar with the process, we recommend contacting your local USPS business mail acceptance department for assistance. A representative can guide you through the complex nuances of multiple entry points and drop ship mailing. Topics to inquire about include: required documentation, pallet requirements, planning to maximize postage discounts, and logistics.



## ConnectRight™ Mailer Address Presorting

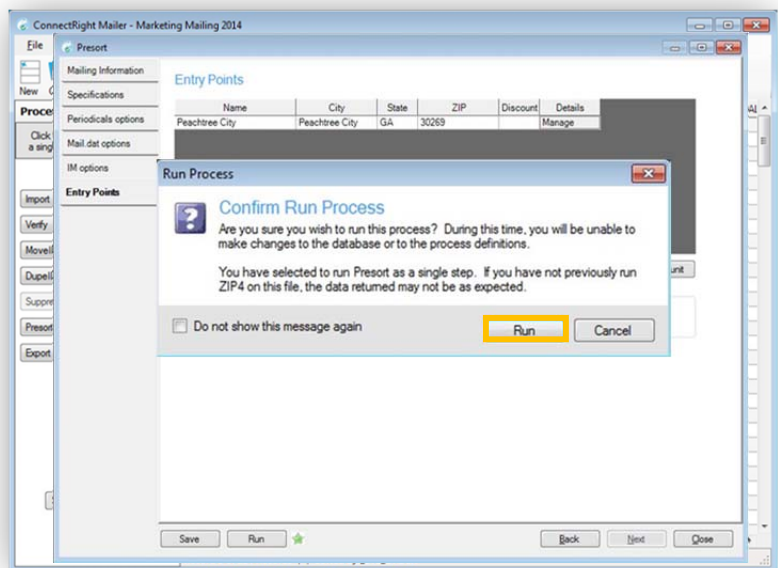
18

Select **Run** to begin presorting your list, or **Save** to keep your settings for future mailings.



19

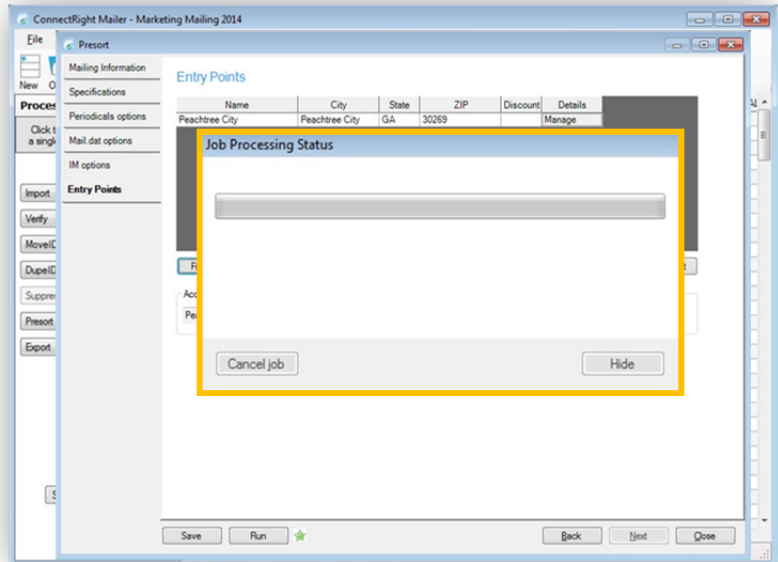
You will be asked to confirm your selections. Select **Run** to continue.



## ConnectRight™ Mailer Address Presorting

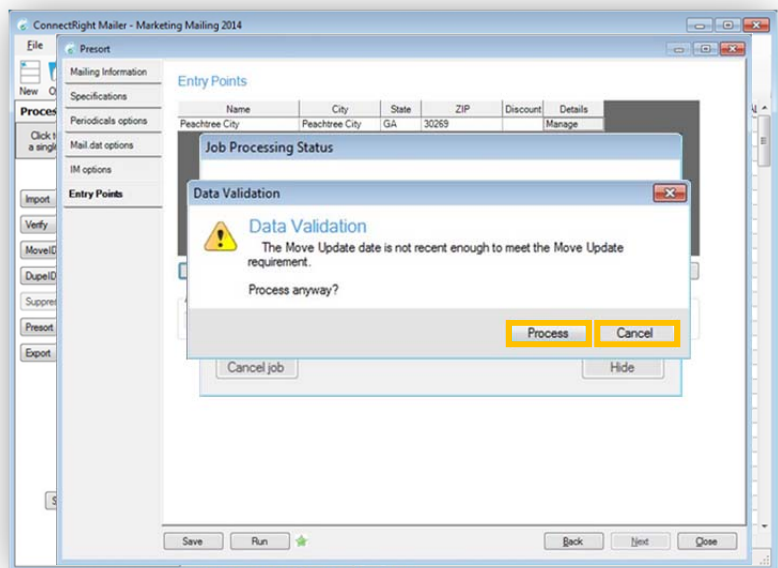
The **Job Processing Status** window will display indicating the progress of the Presort.

20



If there are any validation issues, you will be prompted to confirm that you want to continue processing. Click the **Process** button to continue or click **Cancel** to stop the job.

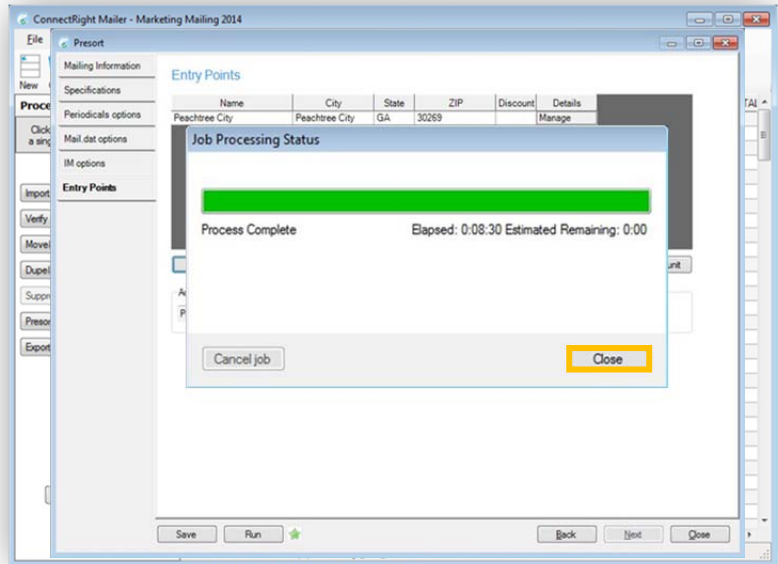
21



## ConnectRight™ Mailer Address Presorting

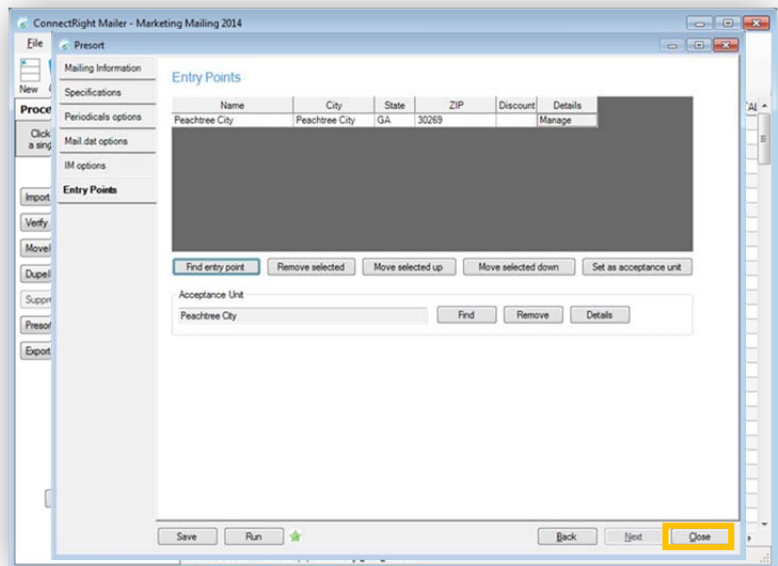
22

When the **Job Processing Status** window shows Process complete, click the **Close** button.



23

Select **Close** to return to the home screen.



NOTES: