Presort & Post-Presort Software:

You Need Both to Optimize Your Mailings

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Agenda

- Two essential types of software
  - ✓ Presort software
  - ✓ Post-presort software
- How they are different
- How they work together
- Why you need BOTH to be successful

What is Presort?

- Group of software solutions that perform:
  - ✓ Address verification
  - ✓ Address hygiene
  - ✓ Mailing list management
  - ✓ Mail sortation

Think pre-sort

Address Hygiene: Complete, Correct & Current

- ✓ USPS® CASS Certified™ software to make sure addresses are **complete & correct**
  - First compares/validates against range possibilities in the USPS ZIP+4 database
  - USPS DPV® file: validate whether the delivery point is an actual deliverable address
  - LACSLink® (Locatable Address Conversion System): tells if address has been converted from Rural Route/Box Number address to a street-style address
  - SuiteLink®: corrects/appends secondary address information for input records that already have a company name present and matches the USPS database – required use with CASS Cycle N in August 2011

Employ an approved move update method to make sure addresses are *current*

Authorized Move Update Methods	
Pre-mailing methods	NCOA^Link®
	FASTforward® MLOCR (E-O-L 07/2012)
Post-mailing methods	ACS™ (Traditional, OneCode or Full-Service)
	Ancillary Service Endorsements
Alternative methods	Legal Restraint Method
	99% Accurate Method

- **Save time and money by deleting duplicate records**
  - ✓ Suppression Lists
    - ➢ The Direct Marketing Association's DMAChoice file
    - ➢ Mailer database
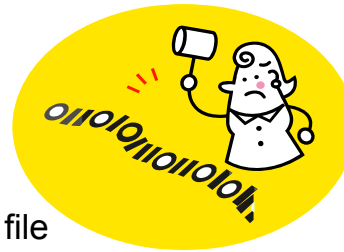
  Recommendation: perform all address hygiene processes *before* attempting duplicate elimination – comparison groups are formed based on ZIP & portions of the name – incorrect ZIPs can lead to dupes being missed

The Presort

- Must be properly sequenced according to the rules in the DMM to get postage discounts
  - ✓ Vary by class (First-Class™, Periodical, Standard Mail®, etc.)
  - ✓ Vary by type of mail (letters, flats, parcels, etc.)
  - ✓ Minimum quantities, piece weights and/or thicknesses, etc. etc. etc…

The Presort

- Sequencing is based upon ZIP Code™
  - ✓ Group mail for like ZIP Codes together into units factoring in minimum volume, weight, or number of pieces.
  - ✓ "Nesting nature"
    - – Pieces/Bundle
    - – Handling Unit (tray/sack)
    - – Container (pallet, APC)

Presort Output Files

- **There are multiple output files produced by the presort process**
  - ✓ Name-and-address
  - ✓ Container label
  - ✓ Ink-Jet
  - ✓ Mail.dat®

What is Mail.dat?

Industry standard database for mailing information, set by IDEAlliance®

- ✓ Output from a presort software or MLOCR Presort Machines
- ✓ Summarizes all the information about a mailing except for names & addresses for confidentiality
- ✓ Allows all parties to easily exchange mailing data in an industry-standard format

Need to get a User License Code from IDEAlliance
www.idealliance.org

Mail.dat files

Relational database

- Set of individual data files that together provide all the information for a mailing

  Examples:

  - ✓ MPU file: Mail Piece Unit File

  - ✓ CSM file: Container Summary File

AIG3209A.CPT
AIG3209A.CQT
AIG3209A.CSM
AIG3209A.HDR
AIG3209A.MCR
AIG3209A.MPA
AIG3209A.MPU
AIG3209A.PDR
AIG3209A.PQT
AIG3209A.SEG

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Mail.dat files

- There are hundreds of licensed Mail.dat users
  - ✓ Mailers
  - ✓ Software Vendors
  - ✓ Publishers
  - ✓ Service Providers
  - ✓ USPS®

- Primary format of electronic data files accepted by the Postal Service™

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Is Presort Enough?

- ✓ Did you have to re-run the presort because the piece-weight changed?
- ✓ Did you pay for spoilage or other mailpieces that didn't get mailed?
- ✓ Do you or your business partners have to manually enter the postage information into an accounting system?
- ✓ Did you lose out on additional savings by not properly drop shipping your mail?
- ★ **If so, post-presort software can help you!**

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Presort Alone is NOT Enough

- It can be difficult and time consuming to make any <u>changes</u> to the mailing using only presort software

- Some changes can only be made by <u>re-running</u> the presort process, but most changes can, and *must*, be made using Post-presort software

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Post-presort software

- Post-presort software specializes in Managing / updating the mailing data

  - Piece attributes (weight, thickness, etc.)

  - Entry points/destinations

  - Advertising percentage (Periodicals)

  Automating the process of transmitting the data to *PostalOne!*® for Intelligent Mail® Full-Service, FAST®, mail verification, distribution, and postage accounting

What can Post-Presort software do?

- Validate Mail.dat files

  - Incorrect formatting

  - Errors/Missing data

  - IDEAlliance®

  - *PostalOne!*®

- Produce error report(s) that can be used to locate and make necessary edits in the Mail.dat file

What can Post-Presort software do?

Edit Mail.dat files

- Presort is the initial plan, but plans change
- Easily make last minute changes in piece-weights / thickness or advertising percentages (Periodical mail)
- Produce your postal documentation to reflect what you actually mailed vs. matching your mailing to your documentation

** USPS *PostalOne!* system requires users to have the ability to edit Mail.dat files.*

What can Post-Presort software do?

Flexibility for Partial Mailings

- Large presorted mailings are sometimes released to the USPS or transportation companies over the course of several days or weeks
- Produce reports representing <u>only</u> that mail versus producing postage statements for the <u>entire</u> Mail.dat file

* Post-presort software lets you produce postage statements that accurately reflect <u>exactly</u> what you are mailing!

What can Post-Presort software do?

Manage Date of Mailings with Rate Changes

- Apply current/new rates on the date of your mailing
- Produce reports representing only that mail versus producing postage statements for the entire Mail.dat file

* Post-presort software allows mailers the flexibility to manage mailings better during postage rate changes.

What can Post-Presort software do?

Merged Mailings & Co-palletization
- Mail service providers or "consolidators" may opt to merge mailings from multiple jobs into a single, larger mailing to get greater discounts
- Easily merge multiple Mail.dat files from multiple jobs that were presorted at different times and places

* Post-presort software lets you easily merge Mail.dat files - convert NDC pallets into SCF pallets or convert SCF pallets into 3-dgit for meeting in-home delivery dates and achieving increased postage savings.

What can Post-Presort software do?

Get updated Drop-Ship and Labeling List Data

- Automatically update your database file as changes are made by the USPS®
- Configure the setting and get updated information with a version number on a daily/weekly basis
- Reduce errors, improve distribution accuracy, and save time and labor spent on updating each change manually

  * Using updated data helps you optimize mailings by making sure your handling units and containers go to the correct destinations.

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What can Post-Presort software do?

Postage Savings and In-Home Date Management with Drop-Ship Analysis

- Analyze Mail.dat files to compare the origin postage against the destination postage to get best drop ship discount (i.e., NDC's, SCFs, DDU's)
- Produce all pertinent documentation required for drop shipping (8125's, 8017's, postage statements, production and loading reports, and pallet placards)

  * Using post-presort software to create the optimum drop-ship entry plan will help you save even more money and control your in-home dates.

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What can Post-Presort software do?

Produce and Manage IMb for Trays and Pallets

- Maintain unique serial number for Handling Units and Pallets which must remain unique for a period of 45 days from the Postage Statement date of mailing

  * Using post-presort software can help you generate and manage unique IMb's for trays and pallets.

What can Post-Presort software do?

Manage Spoilage and Shortage
- Damaged pieces = Spoilage = Can't be mailed
  - ✓ Immediately replaced, mailed at a later time or not get mailed at all
- Shortage of supplies (postage, inserts)
- Post-Presort software lets you edit Mail.dat files to remove the spoilage and pieces which were not before generating the final postage statements

  * Don't pay for pieces that don't get mailed!

What can Post-Presort software do?

Store Mailing Data Electronically

▪Use the data to generate reports for in-house and customers

▪Share data with other business applications (project management, production, accounting)

✓ Prevents over-payment of postage and provide accurate reconciliation of mailing counts

Post-Presort software lets you easily update final postage to your postage accounting system

What can Post-Presort software do?

Efficient Mail Verification and Acceptance using eDoc

✓Generate and submit postal documents electronically - speeds up the entire mail verification and acceptance process

✓For Intelligent Mail® Full-Service, mailers **must** submit electronic documentation (eDoc) to qualify for further postage discounts

Post-presort software can give you <u>both</u> options: eDoc and the option of a hard-copy version when needed (PostalOne! outage on February 5th, 2010 for four days)

Postage Statement

- Use Post-Presort software and generate eRound Stamp™ on PS form with Job ID, Mailing Group ID and PS#.

What can Post-Presort software do?
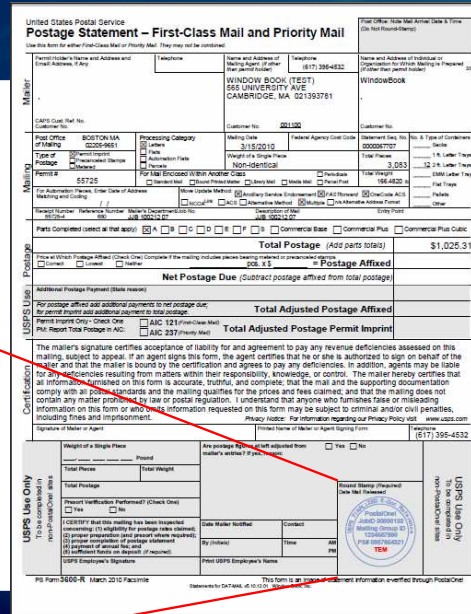
Automate tasks that are done manually

- Be more productive in shorter time with less manual labor
- Frees up staff for more productive tasks
- Reduce human errors involved with manual data labor

* Reduce your overhead costs by staffing efficiently, increasing accuracy and reducing errors.

Go beyond presort using post-presort software

Presort Software Vendor A	→	**Mail.dat**
Presort Software Vendor B	→	**Mail.dat**
Presort Software Vendor C	→	**Mail.dat**
MLOCR Machine 1	→	**Mail.dat**
MLOCR Machine 2	→	**Mail.dat**

Post-Presort Software

- **Merge multiple mailings from various sources**
- **Edit Mail.dat to reflect actual mailings**
- **Process partial jobs**
- **Remove spoiled pieces from final Postage Statements**
- **Improve postal data maintenance**

- **Electronic postal statements to USPS® *PostalOne!* for faster verification**
- **eDoc & Intelligent Mail options (Mail.dat / Mail XML)**
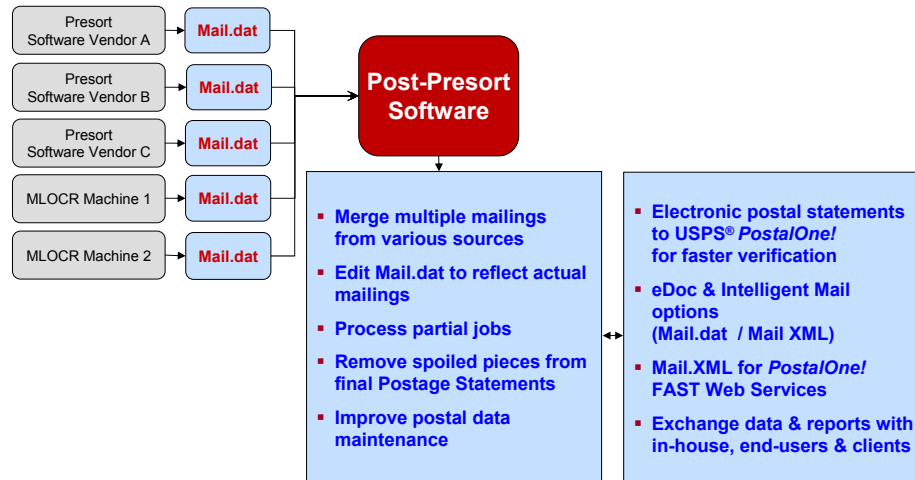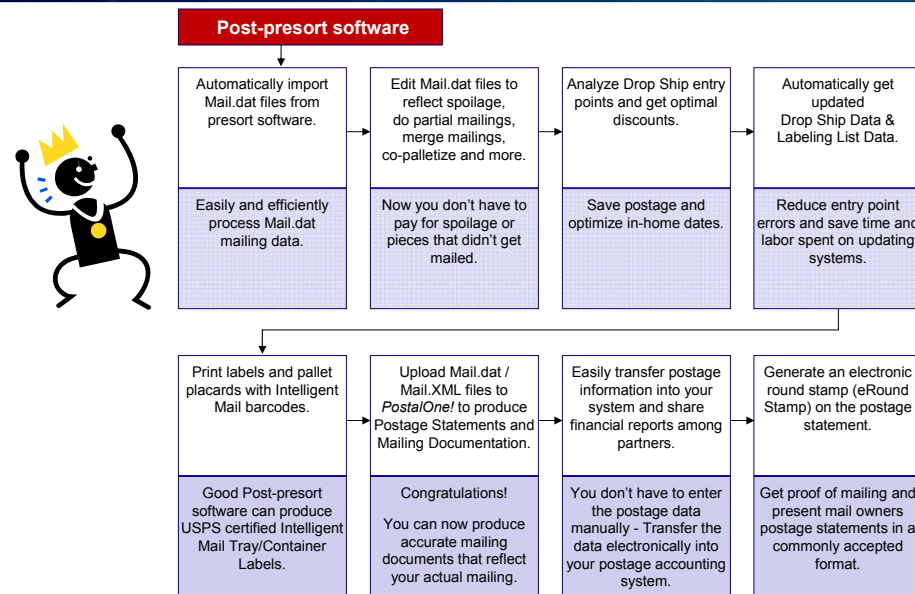- **Mail.XML for *PostalOne!* FAST Web Services**
- **Exchange data & reports with in-house, end-users & clients**

Post-presort software can help you!

Post-presort software

Automatically import Mail.dat files from presort software.	Edit Mail.dat files to reflect spoilage, do partial mailings, merge mailings, co-palletize and more.	Analyze Drop Ship entry points and get optimal discounts.	Automatically get updated Drop Ship Data & Labeling List Data.
Easily and efficiently process Mail.dat mailing data.	Now you don't have to pay for spoilage or pieces that didn't get mailed.	Save postage and optimize in-home dates.	Reduce entry point errors and save time and labor spent on updating systems.

Print labels and pallet placards with Intelligent Mail barcodes.	Upload Mail.dat / Mail.XML files to *PostalOne!* to produce Postage Statements and Mailing Documentation.	Easily transfer postage information into your system and share financial reports among partners.	Generate an electronic round stamp (eRound Stamp) on the postage statement.
Good Post-presort software can produce USPS certified Intelligent Mail Tray/Container Labels.	Congratulations! You can now produce accurate mailing documents that reflect your actual mailing.	You don't have to enter the postage data manually - Transfer the data electronically into your postage accounting system.	Get proof of mailing and present mail owners postage statements in a commonly accepted format.

Use both presort and post-presort

Presort	Post-Presort	*PostalOne!*®

Initial Plan

✓ Address Quality
  - ➤ Complete
  - ➤ Correct
  - ➤ Current
✓ List Management (de-dupe)

n/sequence

USPS® CASS Certified
USPS DPV® file
Certified NCOA Link®

+

Final transaction

✓ Update/Manage mailing data (Mail.dat, Mail.XML)

✓ Make last minute changes

✓ Manage spoilage

✓ Generate accurate eDoc for *PostalOne!* and Intelligent Mail services

✓ FAST Drop-Ship appt's via Mail.XML

✓ Mail verification

✓ Postage accounting

✓ Share mailing & postage data with partners

Use both presort and post-presort

- Handle complex, large-volume mailings with tight deadlines

- Reduce errors from manual data labor and increase accuracy

- Increase your efficiency and productivity

- Stay abreast of changes in mailing requirements

Use both presort and post-presort

- Stay ahead of competitors and acquire new business

- Save time and money

- Optimize your mailings

- Make a smooth transition to eDoc and Intelligent Mail Full-Service option

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Educational Resources from Window Book

Mailing Industry Informative White Papers
http://www.windowbook.com/whitepapers

Upcoming Online Postal Webinars
http://www.windowbook.com/webinars

View Recorded Webinars:
http://www.windowbook.com/recordedwebinars

Weekly e-mail postal pointers - E-Tips
http://www.windowbook.com/etips

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Questions?

Thank you!

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