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OVERVIEW
Intelligent Mail® for Small Business Mailers (IMsb) is a FREE-of-CHARGE online tool which will allow you to produce the presorted Intelligent Mail barcodes (IMb) for your mail pieces, tray labels and submit an electronic postage statement to the acceptance units.

- Maximum mailing size is fewer than 10,000 pieces for mailings submitted at a BMEU
- Maximum number of mail pieces per year of fewer than 250,000!
  *The IMsb tool does not support incentives.

Start Simple
To use the IMsb, no special software or installation is required. Users simply access the application via a Web Browser.

The IMsb Tool has been specifically developed for small business mailers to meet Full-Service requirements.

The IMsb tool generates a unique Intelligent Mail barcode within the address block.

The IMsb tool is designed for First-Class and Standard Mail permit holders. The IMsb tool supports generation on the following:
- Labels
- Envelopes
- 8 ½ x 11 insert
- Mail Merge option

GETTING STARTED

Prerequisites
Before using the IMsb tool, you need to make sure the following 3 prerequisites are completed:

1) **Mailing Permit** – Mailer must have a postage permit, visit your local BMEU.
2) **Be registered on Business Customer Gateway and have a linked permit**
   If you haven’t already please follow these steps to link your permit:

Link Permit

   Click on Mailing Services from the BCG Homepage
Then choose Manage Permits and Go To Service.

Select your Business Name by clicking the link in the ‘Name’ column. You will be taken to the following page:

Scroll to the bottom and select the ‘Permit Validation’ tab. 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 $220.00, enter 220.00 and then click ‘Validate’.
Once linked, your permit information will be available to you within the IMsb application. If your permit does not link- call the help desk (800) 522-9085 option 3. Ask them to LINK YOUR PERMIT.

3) Have a Database/Address list in one of the following formats:

**Database formats allowed:**

In order to upload an address list to the IMsb, the file must be in one of the following formats:

- **Microsoft® Excel 2010**
- **Microsoft® Excel 2007**
- **Microsoft® Excel 2003**
- **Comma Separated Value (CSV)**

**Match fields**

The IMsb Tool will work with any database you have already created. Use the drop-down list to select the proper database field for each field. If the IMsb tool can’t match a field
with a column from your data file, the fields will not be merged correctly.

The elements of an address block are listed on the left. Column headings from your data file are listed on the right.

The IMsb tool searches for the column that matches each element. In the above illustration, the IMsb tool automatically matched the data file's Company column to the Company. But IMsb was unable to match other elements such as First Name or Last Name.

By using the lists on the right, you can select the column from your data file that matches the element on the left. In the illustration below, the First Name, Middle Name, Last Name and Primary Address column now matches fname, mname, lname, and the Primary Address column matches Address. It's okay if Secondary Address isn’t matched, because it is not relevant for this address block.
Below is an illustration of all the data elements in this database available for selection.

Note:
- The information will be included in the output address block in the following order:
  Name: Mr. Bill Jones
  company: DAISYS FLOWER SERVICE
  urbanization (PR addresses only) Optional
  sec-address: Third Floor
  address: 475 LENFANT PLZA SW
  city, state, zip: WASHINGTON DC 20260-0912

Your address list will be standardized by the Address Management System. Some data that you provided may be corrected and/or combined. For example: suite or apartment
numbers provided in the sec-address field will likely be appended to the address field data to provide a complete primary delivery point address.

**Business Customer Gateway**

Customers who had previously created an account in the BCG will not need to register again.

**Log In to IMsb**

1) Go to usps.com and select the Business Customer Gateway link (located at bottom of page) lower right corner.

2) Access IM sb by clicking the “Mailing Service” link on the left side of the BCG home page.

Choose Intelligent Mail Small Business (IMsb) Tool from list

From the Intelligent Mail for Small Business (IMSB) page, click “Authorization complete. Click to Continue.”

Read the terms on the ‘Notice of License’ and then click the “Accept” button to begin!
This is the landing page of the IMsb application. This page provides a brief description of the application as well as some of its features.

**STEP 1: CREATE NEW JOB**

Select “Create New Job” from the Intelligent Mail for Small Business (IMsb) Tool page.

**Mailer Information**

The first screen to appear after selecting **Create New Job** includes the Mailer Information. First enter a Description of the mailing for reference and then select via dropdown:

1. **Method of Entry:**
   - BM EU
   - RETAIL-offered at select pilot sites
2. **CRID** (prepopulated)
3. **Mailer ID** (prepopulated)
Postal Wizard Information

1. Permit - select from drop down.
   - If you have multiple permits, select the permit you wish to use for this mailing.

If you have selected a “MT” metered permit, you will be asked to confirm the affixed postage later in the process.

Click Continue.

Service Type ID Information

Selections are required for the following:

1. Class of Mail - select from drop down
   - First Class
   - Standard
2. IM Service Type
   - Defaults to Full Service
3. Extra Service Type
• How do you get your Address corrections back?
  • Manually or Electronically
  • View ACS Guide in ‘Attachments’ for guidance as there can be charges associated to the selection made.

(4) IM Tracing-
(5) Ancillary Service Endorsement
  • Select the ancillary service endorsement currently used on mailpiece if applicable.

**Mail Piece Information**

The Mail Piece information page lets you describe the mailing piece. The tool will tell you how many pieces of Mail Transport Equipment (MTE) you will need and which mailpiece goes into which tray based on the information you provide here.

1. **Processing Category** - select from the Drop Down menu.
   - Letters or
   - Flats
2. **Standard Envelope Sizes**
   - Other- mailer inputs dimensions - typically used for folded self-mailers
   - #6 ¾ envelope
   - #7 envelope
   - #10 envelope

Note: You will have the option to select a label size if so desired in a different section of the IMsb tool.

3. Enter the thickness of 50 pieces (in inches). (This is very important- the thickness determines how many trays will be needed for the mailing)
4. Enter the single piece weight of the mail (in ounces).
5. Select the approximate **Mailing Date** that you plan on bringing the mailing/job to the Postal Service. Mailings prepared by IMsb must be received by USPS within 30 days of creating your labels or envelopes.
6. Enter approximate number of pieces to be mailed. Final pieces mailed will come from your uploaded address list.
Additional Mailing Options

1. Destination Entry Discounts
   - DSCF
     - Select DSCF if you enter your mail at a Sectional Center Facility.
     - If unsure, ask your local acceptance unit.
   - None

2. Move Update Service Method:
   The Move Update standard is a means of reducing the number of mailpieces in a mailing that require forwarding or return by the periodic matching of a mailer’s address records with change-of-address orders received and maintained by the Postal Service. Mailers who claim presorted or automation prices for First-Class Mail or Standard Mail must demonstrate that they have updated their mailing list within 95 days before the mailing date.

   The Postal Service offers three preapproved methods: Address Change Service (ACS), National Change-of-Address Linkage System (NCOA<sup>link</sup>), and Ancillary Service Endorsements except for Forwarding Service Requested. Alternative methods that require separate approval also are offered for First-Class Mail. Mailers must use one of the preapproved or alternative methods to meet the Move Update standard.

   The Move Update standard is met when an address used on a mailpiece in a mailing for any class of mail is updated with an approved method and the same address is used in a commercial First-Class Mail or Standard Mail mailing within 95 days after the address has been updated. Except for mail bearing an alternative address format, addresses used on all pieces claiming Standard Mail prices are required to meet the Move Update standard.

   - Select from the drop down, the method you used on this mailing to meet Move Update requirements!

3. Select the Price Category.
• Regular
• NON PROFIT- must be approved as NON PROFIT with the USPS.

4. Is this a political mailing? yes or no answer required
5. Mailing contains windowed envelopes or windowed flats? – click box if yes.

Return Address: Optional
The Return address screen provides you with the option to print the return address on your mailpiece. If you already have the return address printed on your piece, you would not populate this section.
Note: The IMsb tool does not have the capability of printing the indicia.

Review and Confirm.
Address File Uploading

Select “Browse” to search for your Address List file on your computer.

Select the desired address list file from the pop-up window and click “Open”. Click “Upload”

The IMsb tool will display the Address File Viewer on the Address File Uploading screen. This screen is used to verify the correct address list was used and the correct fields are displayed.

Method of Entry

Defaults to where your permit is held. (PO of permit)

If approved for Mail Anywhere-
An alternate location can be selected.
STEP 2: ADDRESS PROCESSING

Address Correction

AMS will verify that your addresses are valid addresses with the required delivery points. Your addresses will be reformatted to conform to USPS specifications.

Note: The AMS process only verifies that the address is a good delivery address; it does not check that the name/business associated with the address is accurate.

Click “ADDRESS CORRECTION COMPLETE. CLICK TO CONTINUE”

By clicking the link above, you will be directed to the AMS Processing Summary Page. On this page, you will see data on your addresses. Each address within your address list is allocated one of four statuses by AMS:

- **Exact Match** - no correction was made to the address by the USPS
- **Matched with changes** - a correction was made to the address to make it correct.
- **Matched to a building default** - means its missing the apartment or suite #.
- **Unmatched** - Bad address according to USPS files.
Review

At this point, by selecting the “Review” button, you may review the addresses in the matched with changes, matched to building default, unmatched addresses and non-DPV print count sections. During the review process you will have the option to take further actions regarding your address list. You also have the option to bypass the review process by selecting “Continue” if you want the tool to accept the results returned.

- If you select any of the review choices, you will be taken to an AMS Default Entry Editor screen where, for each address, you can choose between using the AMS supplied address, the address you originally supplied, or not to have the IMsb tool print the address.

- If you choose to use an original address that does not match, it will be removed from the Delivery Point Validated (DPV) list and added to a non-Delivery Point Address list. The non-Delivery Point Address list will still be available for downloading; however the IMSB tool will modify those address STIDs to specify First-Class Mail. The non-DPV mailpieces must be mailed at the full single piece price.

- You cannot make corrections to your non-DPV addresses within the IMsb Tool. If you want to include them you can download the non-DPV list to your computer and correct them. Once corrected add them back to your Excel or CSV file and then redo your mailing from the beginning uploading your newly corrected address list and then proceed.
Duplicates

Next you can utilize the duplicate elimination function to check for duplicate addresses within your address list and remove any found duplicate address. This function allows you to search for duplicates by:

- Address, First Name and Last Name
- Address and Last Name
- Address Only
- Company and Address

When you click on a button the duplicate address entries will be displayed.

If more duplicates are found than can be reasonably displayed on one screen you will need to use the controls under the display box to step through the duplicate sets.

To mark addresses for deletion simply click the check boxes next to them. Once you have reviewed all the addresses; click the Accept button and all the marked addresses will be removed from the output list.

If you wish to remove all the identified duplicates at once you can click the Delete All button. This will mark all the addresses within each duplicate group, except the first one, for deletion. Again, clicking the Accept button will cause the marked duplicates to be removed from the output list.

If you change your mind about deleting a duplicate address you must UN check the box beside it before clicking on the Accept button. Once the Accept Button has been clicked the process cannot be reversed. If you wish to deselect all of the addresses you have selected simple click the Clear All button.

You may also exit the screen without performing deletions by clicking the Cancel button which will bring you back to the AMS Processing Summary page.
Confirm Affixed Postage **IF** using Meter Postage

Total Postage Affixed- this is total number of addresses after you have cleansed the list thru the tool!

**STEP 3: OUTPUT PROCESSING**

**Tray Label**

The next step in the IMsb process is to prepare Intelligent Mail **Tray** labels, for Full-Service mailings.

From the Tray/ Sack Information screen:
- IMsb will provide a recommended number and type of Containers (Trays or Sacks) to be used to prepare this mailing.
- Click **“New Label”** for the IMsb tool to generate your Unique Intelligent Mail Tray Barcode (IMtb) Label.

Note: The tray labels must be generated using card stock or a standard business card stock which is perforated at 2 x 3.5” such as an AVERY label 5371.

Select **“Edit containers”** if the amount of recommended containers is **not** sufficient.- not recommended.
Tray Label Creation

Optional: Enter the Printer Line information (if applicable) as well as the Mailer’s Area information. **Required:** click “Create Label” to generate PDF of tray/sack label.- name and save this file for use after job has been submitted.

We strongly suggest you save the file to your desktop, finish the job and then print the labels!

Print Tray Labels

Note-*you may only print labels for the current mailing. Labels cannot be reused. To reduce the possibility of a job timeout, it is recommended that you save the labels to your desktop and print them after postage statement submission.
Click Continue and Click “OK” in the pop box “Have you printed your labels?” or select cancel to return to the screen.

Downloads:
The Downloads screen shown below allows you to print your addresses on labels, envelopes or inserts. The addresses are provided in a PDF file which you can either open in Adobe® Reader or save to your computer.

Available label sizes are:
Avery 5161 or equivalent to 1” x 4” label (Postcards/Letters only)
Avery 5162 or equivalent to 1.33” x 4” label (Postcards/Letters only)
Avery 5163 or equivalent to 2” x 4” label (Postcards/Letters & Flats)

Envelopes sizes available:
#6 ¾ - #7 - #10
Other- no envelope used

Insert- option allows you to print directly on an 8.5 x 11 insert.

The address block is configurable.

Mail Merge - allows downloading of file to be used during mail merge option.
• Must include the encodedimbno, presorttrayid, and presortdate fields from the mail merge file to be printed with address block.
Below is an example of a PDF that will be generated upon choosing **1” Label** as your output format.

**Again, we strongly suggest you save the PDF and print the files after you have submitted the job!**

---

**Example of user selecting Number 6 3/4 Envelope from the output format:**

---
Option to save the corrected address lists:

The IMsb tool allows you to save your corrected address list for future use. The Privacy act does not allow the USPS to save your address files.

Downloading of:

1. **Updated address file** will provide the updated address list to be saved in either a CSV or Excel for future use. It will include in the file, the bad addresses tagged as unmatched.

2. **DPV Mail Merge** allows you to merge the address block into a mail merge template.
   - The DPS Mail Merge file includes the unique intelligent mail barcode for each piece to be inserted on your mailpiece as long as the IMb font has been installed from the RIBBs page. ([https://ribbs.usps.gov/onecodesolution/download.cfm](https://ribbs.usps.gov/onecodesolution/download.cfm))
   - The **USPSIMB Standard Font** should be set at 16 point font.
   - The Postal One! Help Desk is available to assist with downloading the font.
To download the font, go to

3. **Non DPV Mail Merge** file allows for printing of bad addresses that can be mailed with a First-Class stamp. (not recommended)

**STEP 4: SUBMIT JOB**

NOTE: We recommend that you print this page for use when sorting your mail. Please pay close attention to the counts in each tray and the special instructions for sortation.
Review and Submit

Review your mailing information, and then click the “Submit” button on the bottom of the page to upload your mailing to the PostalOne! system.
*if you choose ‘Save and Continue’ your postage statement will not be submitted but sent to your Saved Forms. Go to Postal Wizard from home page, in middle of page under "Saved Forms" locate "View incomplete jobs I have started" click there. Click on Postage Statement ID number hyperlink in blue to retrieve. Scroll to bottom right and click submit.

Please print (not required) the **printer friendly** barcoded Electronic Confirmation Acceptance Notice (ECAN) and bring the notice along with your mailing

Or

Use the Email function to present at the BM EU or at the Self Service Terminal.
Please print (not required) the printer friendly barcoded Electronic Confirmation Acceptance Notice (ECAN) and bring the notice along with your mailing to the site you have selected.

You are finished! The tool has submitted your postage statement and qualification report electronically.
ADDITIONAL FUNCTIONS:

**Review Jobs** contains a listing of the Jobs that the user has created on IMsb. Contains Job ID, Job Description, CRID, Mailer ID, Mailing Date, Business Name, Address and Contact. Also allows the information from a selected Job to be prepopulated into a new Job.

**Help Link**

The “Help” link in the upper right corner provides additional information regarding the six buttons on the left side of the screen. And the User Guide on left hand side provides information about each screen and has other valuable information about the IMsb tool.
RESOURCES

1. The RIBBS Website

The USPS provides a number of technical and non-technical guides, informative documents and presentations, and other helpful tools to make it easier for you to take full advantage of the suite of Intelligent Mail barcodes. These valuable resources can be found on the USPS RIBBS website http://ribbs.usps.gov/

Additionally, you can find resources on how to download **USPS IMb standard font for Mail Merge option. (16pt font)**


2. Guides, Specifications and Manuals

For those new to Intelligent Mail services, there are several guides, specifications and manuals that will get you started and give a broad overview of the fundamentals of the program. Following is a list of primary sources of information.

**Domestic Mail Manual (DMM)**

This is the USPS manual that contains standards governing U.S. domestic mail services, descriptions of the mail classes and special services and conditions governing their uses, and standards for rate eligibility and mail preparation. Domestic mail is classified by size, weight, content, service, and other factors.

http://pe.usps.com/text/dmm300/dmm300_landing.htm

**A Resource Map to Intelligent Mail Documents**

This lists all the documents and source materials that you will need to transition to Intelligent Mail services. It provides explanations of each document and information on how to find and print these documents. It is a reference source that will help you as you learn the ins-and-outs of Intelligent Mail services. This document can be found on RIBBS at

3. Personal Support Resources

In addition to the guides and specifications listed above, you can also get help from USPS Intelligent Mail service experts.

To find your local Business Mail Entry (BME) Manager, go to the Business Mail Acceptance page: https://ribbs.usps.gov/index.cfm?page=bma

To contact the PostalOne! Help Desk call 1-800-522-9085. For additional information about IMB Tracing please contact the National Customer Support Center at (800)238-3150.
Address Correction Services (ACS)

INTELLIGENT MAIL for Small Business (IMsb) tool

The IMsb tool offers several selections to mailers. Please review Appendix A or the ACS Tree at the end of this User Guide before making selections as there can be charges associated to the selection made.

The IMsb tool allows 8 options for First Class and 6 options for Standard Mail.

Definitions:

ACS = Address Correction Service
ASE = Ancillary Service Endorsement
ASR = Address Service Requested
COA = Change of Address
CSR = Change Service Requested
ESR = Electronic Service Requested
Note: To receive the information back electronically, customers must change their MID in Business Customer Gateway.
FSR = Forwarding Service Requested
RSR = Return Service Requested
TRSR = Temporary Return Service Requested
UAA = Undeliverable As Addressed / Nixie
ACS is not a guaranteed service. Manual notices may still be received, although reduced in volume. We HIGHLY recommend the use of ESR to help with the reduction of Manual notices.

Changing your MID in the Business Customer Gateway (BCG)

To receive ACS information back electronically, customers must change their MID in Business Customer Gateway.

(1) Log into the BCG and view the Home Page.

(2) Click on MID

![Image of BCG interface with highlighted MID]

Welcome to the Mailer ID System

Mailer ID Search

| Business Location | Mailer ID: 94541451 - IMSBCAT183 89509-2204 |
| Customer Reference: |

Display Options:
- MIDs owned by my business location(s)
- MIDs delegated to my business location(s) for Data Distribution Management
- MIDs whose Data Distribution Profile delegated to other CRIDs
- All of the above

Search

Mailer ID Summary

<table>
<thead>
<tr>
<th>Mailer ID</th>
<th>Business Location</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>000000220</td>
<td>CRID: 94541451 IMSBCAT183 2250 BALSAM ST RENO, NV 89509-2204</td>
<td>Add Data Distribution Profile Edit Program Options More Info</td>
</tr>
<tr>
<td>000000228</td>
<td>CRID: 94541451 IMSBCAT183 2250 BALSAM ST RENO, NV 89509-2204</td>
<td>Add Data Distribution Profile Edit Program Options More Info</td>
</tr>
<tr>
<td>001014080</td>
<td>CRID: 94541451 IMSBCAT183 2250 BALSAM ST RENO, NV 89509-2204</td>
<td>Add Data Distribution Profile Edit Program Options More Info</td>
</tr>
</tbody>
</table>

(3) Click on ‘Edit Program Options’.
(4) Make sure you have a check mark in the ‘Full Service ACS’ box. If not, check it and then click ‘Update’ at the bottom. Pop-up will display confirming update.
Retrieving ACS data from the BCG Dashboard

There are no additional forms or applications to fill out. Simply proceed to the BCG and follow the below instructions to retrieve your ACS/Nixie data.

1. After logging into the Business Customer Gateway (BCG) click on Mailing Reports on the Home page.

(3) Click on #3 for the COA information or #4 for your UAA/Nixie information. You must view/download your corrections within 45 days of your mailing; all COA/UAA-Nixie information is purged after 45 days.

(4) You will need to search for your mailing by Mailing Group ID. That number is produced during your statement creation process within the IMsb tool and is found on your Congratulations Page, make a note of this number now. Remember to print this page and take to the BMEU along with your mail; you could also print an additional page to keep with you for easier reference to your Mailing Group ID.
ACS Tree of Services and Pricing

Please reference Appendix A on RIBBS for additional information.
Printing ESR on your mailpiece will not change the Mailpiece Disposition or fees due.

**No Fee** AND All VAA mail will be disposed.

**Weighted Fee** AND For returned pieces, non-delivery advice.

**Weighted Fee** AND For Forwardable mail, Forwardable mail, all other.

**Preferred Service Fee** AND For returned pieces, non-delivery advice.

**Preferred Service Fee** AND For Forwardable mail, all other.

---

<table>
<thead>
<tr>
<th>Service Selected</th>
<th>ASE Printed on Piece</th>
<th>Mailpiece Disposition</th>
<th>Fees</th>
</tr>
</thead>
<tbody>
<tr>
<td>CSR 1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ASR 1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ASR 2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Standard</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Printing ESR on your mailpiece will not change the Mailpiece Disposition or Fees due.
Convert MS Word to MS Excel

*High Level* - The purpose of this document is to describe the steps necessary to convert address data from Microsoft Word to Microsoft Excel.

Please note if you would like to use this methodology with a Word Perfect file you can right click on your attachment and select “open with”, and select Microsoft Word.
Detailed Steps:

- In the Word document press **Ctrl + Shift + *** at the same time. You will see a `¶` symbol after each row in the word document.

- Press **Ctrl + F**
- Go to the Replace tab
- In the find what: enter `^p`
- In the Replace with: enter the pipe symbol `|` (shift + \ on most keyboards)
- Select Replace All

Microsoft Word will give you a count of how many replacements it made. Don't worry that your formatting looks off and various lines look combined.

- Go to File, then select save as
- In the save as type select **plain text .txt**
- Select ok
Word may display a File Conversion dialog with a warning that all formatting will be lost. Don’t worry and click OK to accept the default values.

- Open Microsoft Excel
- From the File menu, select Open
- In the Open dialog, change the Files of Type: entry to Text Files
- Select the .txt file you saved
- Click Open
- The Text Import Wizard should start. Select Delimited and select next
- In Step 2, change your Delimiter from Tab to Other and enter the | symbol, and select next
- Select finish

Your file should now be in one row in excel for each address. The file may need some manual corrections if there isn’t a standard format for the address (i.e. if you have some files in your word document with three rows and some with four rows you will need to delete out the extra columns in the excel output).

You will need to add column headings for each column. You must use the correct “HEADER” field name for each column. Please refer to the IMsb System User Guide for specifics.