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## Getting Started with Intelligent Mail® Basic and Full-Service options

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### Basic and Full-Service Ready, Set, Go! Process

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- How to get started with Intelligent Mail® services
  - Understanding Basic and Full-Service options
    - Requirements/Benefits
  - Deciding which Option you want to pursue
    1. Talk with Decision Makers/ Business Partners
      - Considerations/Questions
    2. Build a Team
  - Steps in the Process
  - Resources



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## Basic and Full-Service Ready, Set, Go! Process

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### Requirements Overview

- Requirements for Basic-Service Option
  - Intelligent Mail® barcodes on letter and flat mailpieces
- Requirements for Full-Service Option
  - Unique Intelligent Mail® barcodes on letter and flat mailpieces
  - Unique Intelligent Mail® Tray barcodes on tray and sack Intelligent Mail Tray Labels
  - Unique Intelligent Mail® Container barcodes on Intelligent Mail Container Placards
  - Electronic documentation
  - Appointment scheduling using FAST (when required)

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### Benefits Overview

- Why Basic?
  - Multi-Service Barcode for Value-Added Services
  - Reduce Mailpiece Clutter
  - POSTNET and PLANET Code® retirement – in May 2011
  - Position for Future Value-Added Services
- Why Full-Service?
  - All the Benefits of Basic +
  - Current Value-Added Services
  - Address Correction Service
  - Start-the-Clock
  - Lower Price in Fall, 2009

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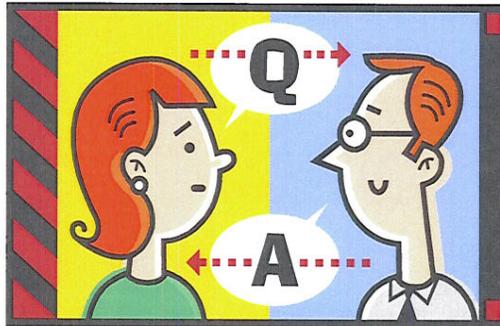
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### Making the Decision

#### 1. Talk with Decision Makers / Business Partner



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### In-House

- Talk to Key Decision Makers within your company
  - Finance, Marketing, Operations,
  - Information Technology
- Key Questions/Considerations
  - What is the value of Intelligent Mail (Benefits Calculator)
  - Define a Vision and Plan
  - Understand capabilities within your own organization

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### Business Partners

In addition to In-House discussion also speak to:

- Business Partners/Service Providers to determine capabilities
  - Presort Software Providers
  - Software Vendors
  - Lettershops
  - Printers
  - Manufacturers – Printers
  - Logistics/Transportation

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- **Key Questions for Business Partners:**
  - What are the capabilities in support of Intelligent Mail today (Basic/Full-Service) and in the future and when ready?
  - What is their ability to print the Intelligent Mail Barcodes – piece, tray, containers?
  - What is their ability to generate and update electronic documentation?
  - How will this integrate within your production process?
  - What are their Mailer ID plans? Can I use my own?

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### 2. Build a Team:

- Include Key Stakeholders: IT, Finance, Business, Business Partners
- Define the Value/ ROI
- Re-engineer your mail supply chain
- Develop Budget
- Develop Implementation Plan
- Review Materials and seek support from Resources

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### Steps in the Process

#### **Basic and Full-Service (unless specified)**

Step 1: Review Guides and Specifications

Step 2: Acquire a Mailer ID

Step 3: Design and Implement Intelligent Mail barcodes

Step 4: Test and Validate Barcodes

Step 5: Design and Test Electronic Documentation

– Optional for Basic

– Required for Full-Service

Step 6: Plan for Feedback

Step 7: Migrate to the Production Environment after May 18

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## Basic and Full-Service Ready, Set, Go! Process

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### Step 1 – Review Guides and Specifications

- Domestic Mail Manual
- Federal Register Notice: Implementation of New Standards for Intelligent Mail® Barcodes
- A Beginners Overview to Intelligent Mail Services
- A Guide to Intelligent Mail for Letters and Flats
- Electronic Documentation and Intelligent Mail: Ready, Set, Go!
- *PostalOne!* Mail.dat Technical Guide
- *PostalOne!* Mail.XML Technical Guide

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### Step 2 – Acquire a Mailer ID

- What it is:
  - A unique 6-digit or 9-digit numeric code
  - Is issued by the USPS for use in the Intelligent Mail® barcodes
  - Mail preparers can request mailer IDs for mail owners
  - Is used to identify the mail owner or preparer
  - Is assigned based on annual mail volume

Barcode ID	Service Type	<b>Mailer ID</b>	Serial Number	Routing Code
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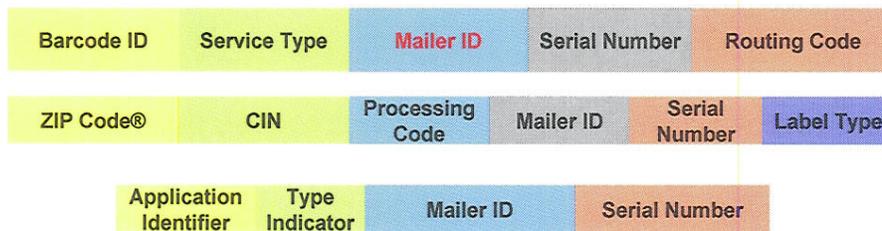
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### Step 2 – Acquire a Mailer ID

- What it is:
  - Different Mailer ID's can be used on the Intelligent Mail barcodes for mailpieces, trays and containers
  - Mailer IDs are used for Data Distribution



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### Step 2 – Acquire a Mailer ID

- The Application Process (Before May 2009)
  - The Mailer ID is requested by contacting your local Business Mail Entry (BME) or Mailpiece Design Analyst (MDA)
  - Application form can be found at <http://ribbs.usps.gov/>.
- The Application Process (After May 2009)
  - Mailers can apply online

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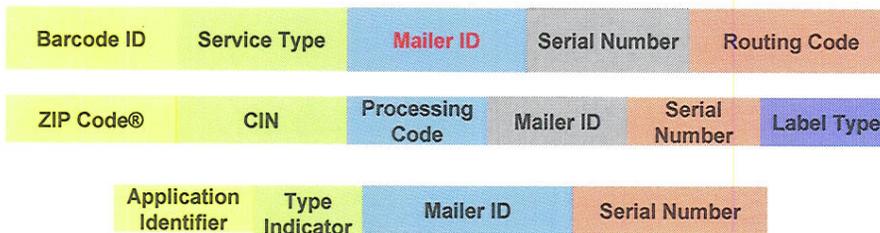
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### Step 3 - Design & Implement Intelligent Mail Barcodes

- Plan your Barcodes
- Uniqueness
- Resources



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## Plan your barcodes ...

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- To generate the Intelligent Mail® Mailpiece barcode, Tray Label barcode, and Container Label barcode here's what you'll need:
  - Plan for barcode data management
  - Services (Service Type Code)
  - USPS provided Mailer ID (MID)
  - IM™ barcode encoder
  - USPS-developed font for the IM™ Barcode Content Identification Number (CIN) List
  - Code 128 subset C font for the IM™ tray and container barcodes
  - Endorsements for Address Correction



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# Uniqueness

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<b>Barcode ID</b> Ex: "00" for No OEL	<b>Service Type ID</b> Ex: "260" for First Class Mail	<b>Mailer ID</b> Ex: "123456" USPS assigned	<b>Serial Number</b> Ex: "000000000"	<b>Routing Code</b> Ex: 6449 Amberview Ct., Memphis, TN 38141834649
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- Difference between Basic and Full Service

- Unique ID
- Different Service Type Codes

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# Uniqueness

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- For Full-Service, mailers are required to maintain unique piece, tray, and container barcodes for 45 days from the date of induction
- Managing uniqueness can be complex
- Key considerations:
  - How will uniqueness be driven?
  - Who will manage uniqueness?
  - Will uniqueness be managed centrally?



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## Uniqueness

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- Consider letting a one-stop shop handle your uniqueness
- Use 'license plating' to connect data behind the scenes
  - Use the barcode to relate to data in a database
  - Remember: You'll be able to link address correction information to pieces and mailings without using keyline information

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## Resources

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### Resources for Generating IM Barcodes and Labels

- Talk with your vendor about generating the label and barcode
- Access <http://ribbs.usps.gov/> for the latest Intelligent Mail® specifications for mailpieces, trays and containers

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### Step 4 – Test and Validate Barcodes

- Manual Tools
  - Visual Inspection
  - Plastic Templates
  - Optical Comparator
- Software Tools
  - Online Encoder/Decoder
  - Scanners and Verifiers
- Full-Service - Tray Label Certification Program (Memphis)



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### Step 4 – Test and Validate Barcodes

- Contact your Mailpiece Design Analyst (MDA) to validate your barcodes
  - District Business Mail Entry Locator
    - <http://www.usps.com/ncsc/locators/find-bme.html>
  - Mailpiece Design Analyst Locator
    - [http://pe.usps.gov/mpdesign/mpdfr\\_mda\\_lookup.asp](http://pe.usps.gov/mpdesign/mpdfr_mda_lookup.asp)

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### Step 5 – Design and Test Electronic Documentation

- Basic: Electronic Documentation is Optional
- Full-Service: Electronic Documentation is Required
- Options:
  - Mail.dat
  - Postage Statement Wizard (< 10,000 pieces)
  - Mail.XML (coming in November)

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### Step 5 – Design and Test Electronic Documentation

- Basic Option
  - Electronic Documentation includes Postage Statement
  - Aggregate Mailing Data such as a Qualification Report
- Full Service Option
  - Electronic Documentation includes Postage Statement
  - Aggregate Mailing Data and Detail Mailing Data
  - Mail Owner, Mail Preparers
  - Intelligent Mail barcodes on mailpieces, trays and containers
  - Nesting relationships

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### Step 5 – Design and Test Electronic Documentation

- Talk to Presort Software vendors and business partners to determine Electronic Documentation capabilities
- Develop/Acquire Software
- Test Electronic Documentation submissions with USPS in the Mailer Test Environment

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### Step 5 – Design and Test Electronic Documentation

- Mail.dat Update
- Current Mail.dat users should continue to use Mail.dat 8-1 or 8-2 after May 11
- Full Service requires Mail.dat 9-1
- Mailers should test the Mail.dat 9-1 Full Service File submission process in the Test Environment for Mailers after May 18
- Validate Mail.dat 9-1 Files prior to migrating to USPS Production System

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### Step 5 – Design and Test Electronic Documentation

- Test Mail.dat File Submissions to USPS Test Environment
- Work with *PostalOne!* Help Desk to Test and Validate files
- *PostalOne!* Help Desk notifies BMEU/BMS when testing is complete
- Parallel Testing Process – use both Hardcopy and Electronic mailing information for a period of time
- BMEU/BMS approve movement to Production system.

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### Step 6 – Plan for Feedback

- How will you use the Start-the-Clock and Address Correction information
- Who will receive the data?
- How will you receive the data?
- How will you update your address lists?

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### Step 7 – Migrate to the Production Environment after May 18

- Migrate to Production Environment after Testing is complete in the Test Environment for Mailers

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## Lessons from Early Adopters

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- Ability to induct Full-Service Mail does not happen overnight!
- Consider whether to “build or buy” capabilities
- Pay special attention to managing uniqueness and the Mailer ID



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## Additional Resources

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- Domestic Mail Manual
- [www.ribbs.usps.gov](http://www.ribbs.usps.gov)
- Federal Register Notice: Implementation of New Standards for Intelligent Mail® Barcodes
- A Beginners Overview to Intelligent Mail Services
- A Guide to Intelligent Mail for Letters and Flats
- Electronic Documentation and Intelligent Mail: Ready, Set, Go!
- Technical Help for Barcodes
  - Specifications USPS-B-3200; USPS-L-3191 and USPS-L-3216; USPS-B-3215
- Technical Guide for Electronic Documentation
  - *PostalOne!*® Mail.dat Technical Guide
  - *PostalOne!* Mail.XML Technical Guide

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## Resources & Information

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- Contact your local Business Mail Entry Unit or Mailpiece Design Analyst:
  - District Business Mail Entry Locator  
<http://www.usps.com/ncsc/locators/find-bme.html>
  - Mailpiece Design Analyst Locator  
[http://pe.usps.gov/mpdesign/mpdfr\\_mda\\_lookup.asp](http://pe.usps.gov/mpdesign/mpdfr_mda_lookup.asp)
- Contact the Help Desk: 1-800-522-9085
- *PostalOne!*® information <http://usps.com/postalone/>

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