# Postal Methods

## User Guide

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# Compose a Letter

You can create your letter and customize it using various fonts styles, sizes, colors, or paragraph styles. Once completed, you can also save the letter as a template to use multiple times.

**Description:** On the right side of the screen you will enter a description. This helps to identify your letter if you ever need to look back on it.

**Send to Address:** Enter the address that you want the letter sent to. If the address is already in your Address Book, as you start typing the Name and the information will automatically be populated into the fields.

**Return Address:** Enter the return address. If the address is already in your Address Book, as you start typing the Name and the information will automatically be populated into the fields.

**Add to Address Book:** If the address you enter is frequently used addresses, you can add them to your address book.

**Preferences:** This allows you to choose printing options such as Black and White or Color print, printing on one side of the paper or both sides, using perforated paper or reply envelopes. The default will be Black & White print on one side of the paper.

**Uploads:** You have the option of also uploading documents. These documents will go behind the first page which contains the address, return address and body letter that you write.

After entering your Send to Address, Return Address and preferences, you can now start typing your letter. Use the menu bar to use different fonts, colors or paragraph styles.
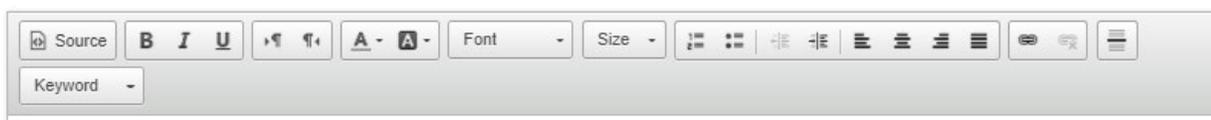
**Save as Template:** If the letter composed could be used again, you can click on Save as Template. This will not save the addresses but will save the letter. When you click on Save As Template you will be asked to enter a Title and Description. This will help you to choose the template when needed. Any uploaded documents will also save with your letter.

**Preview:** Click on preview to view your document before submission.

**Send:** Click on Send to process and send your document.

# Upload Letter

Upload your file(s) into Postal Methods and if needed, you can add a cover page with the address and type out any needed text.  This function automatically places a cover page with the send to address and return address.

**Description:**  Enter your description.  This helps to identify the letter if you ever need to look back on it.

**Upload File:**  You can drag and drop your file or browse to upload.  You can only upload one file on this screen, however if you have additional files to add, you can upload them in a later step.

**Click on Next Step**

**Send to Address:**  Enter the address that you want the letter sent to.  If the address is already in your Address Book, as you start typing the Name and the information will automatically be populated into the fields.

**Return Address:**  Enter the return address. If the address is already in your Address Book, as you start typing the Name and the information will automatically be populated into the fields.

**Add to Address Book:**  If the address you enter is frequently used addresses, you can add them to your address book.

**Preferences:**  This allows you to choose printing options such as Black and White or Color print, printing on one side of the paper or both sides, using perforated paper or reply envelopes.  The default will be Black & White print on one side of the paper.

**Uploads:**  You have the option of also uploading more documents. These will go behind the first document that you uploaded.  You will want to upload the documents in the order you want them to appear in your letter.

**Send:**  Click on Send to send your process and send your document.

# Mail Merge

## Upload CSV File

Upload your list of recipients in a CSV file to merge with a letter template. Match CSV file fields with Postal Methods fields to seamlessly mail letters to all of your desired recipients.

**Description:**  Enter your description.  This helps you identify your letter if you ever need to look back on it.

**Upload CSV file:**  If you will be using a CSV file, make sure the option **Upload CSV** file is selected.

**Upload File:**  You can drag and drop your CSV file or browse to your computer to select.

**Click on Next Step**

On this screen you will match your CSV file fields with the standard Postal Methods fields.  The only fields required are for the Send to Address.

To map your fields, click in the area where it says "Select CSV Fields".  This will give you the entries in the first row of your CSV file. Choose the corresponding fields that match the fields on the left side.



You have the choice of mapping **To First** and **To Last Name** or **To Full Name** depending on what you have on your CSV file.

You have the choice of mapping **TO CITY STATE ZIP** or mapping each one separately using **TO CITY, TO STATE, TO ZIP CODE.**          ***Do not use Country unless the letter is international***

You have additional fields, **MISC TEXT**  can be used within the body of your mail merge.

**Click on Next** when you have completed mapping the fields needed for your document.  All fields do not have to be mapped.  The only required fields are the TO address fields.

**Choose Template:**  If you already have a template created for the Mail Merge, you can select it here.  Otherwise, click on **Create Template.**

**Variables:** You have the opportunity to use variables from your CSV file within your letter as long as you mapped them in your first step.

Type the letter you would like to send.



Click on **Next.**
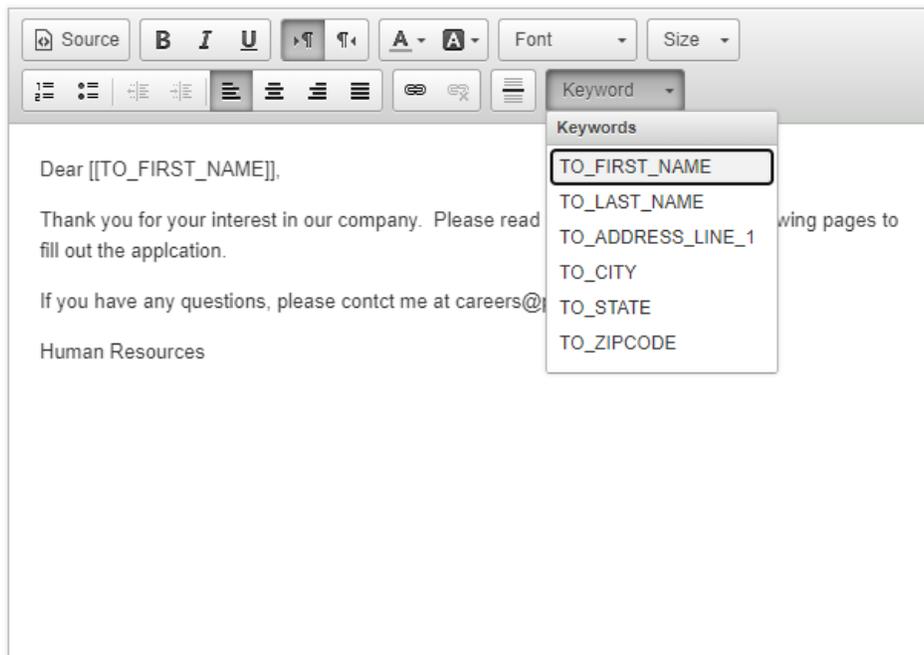
You will see a quick preview of your document along with your estimated cost of mailing.

If you are satisfied, click on Send.

# Mail Merge

## Select from Address Book

Use your address book to seamlessly mail letters to all  your desired recipients.

**Description:**  Enter your description.  This helps you identify your letter if you ever need to look back on it.

**Sender's Information –** Fill in the Sender information

**Recipient's Information** – Choose the addresses that you want your documents mailed to by click on the box next to Name.

**Click on Next**

**Choose Template:**

If you already have a template created for the Mail Merge, you can select it here.  Otherwise, click on **Create Template.**
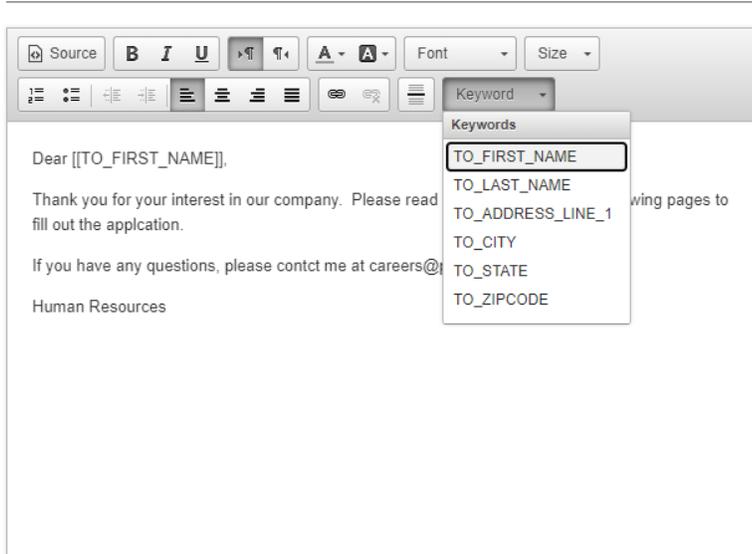
Create the letter you would like to send.

**Variables:**  You have the opportunity to use variables from within your Address Book such as the first name to use within the letter.

**Compose Letter**

| | **Click on Next.** |
|---|---|
| | You will see a quick preview of your document along with your estimated cost of mailing. |
| | If you are satisfied, click on **Send.** |

# Multi Documents

Multi Documents allows you to upload one file containing multiple documents to be sent out. You can divide out your documents by number of pages, first page indicator or manually determine the first and last page.

**Description**:  Enter your description.  This helps you identify your letter if you ever need to look back on it.

**Drag and Drop your file or Browse** to your computer to upload the file.

Click on **Next**

You will see the first page of your document.  If your address and return address are in the right location as indicated by the blue and red selection box, the system will not create a cover page.  It will use your page as the first page.  *(Blue box is return address, red box is send to address)*

If your address does not fit in the selection box, click on the box.  You will see square handles around the selection box.  You can now move the box to the area that holds the address.  When you move the selection box, a cover page will be created.  It will not copy over any images.

**Click on Next Step**

You now have three options for the Multi Document:

# Drag and Select Identifier

Drag and select an identifier from the first page of your document that will indicate that every First Page will have this on it.  This is the way it will divide up your document.   Documents will be broken down on the basis of your selection of the identifier

# Number of Pages

You can choose the number of pages that are within a single document. This will only work if all your documents have an equal number of pages.  Use the "+" to select the number of pages.

# Manual

You can manually choose the first and last page of each document.  This should only be used if there is not an equal number of pages or if there is no first page identifier.

As you hover over the page, you will see Preview (to preview the document) and Start.  If this is the start of your document, choose Start.

Now go to the last page in the first document.  As you hover over the page, you will see Preview and End.  Choose End for the last page of the document.

Continue using this method for each document (Choose Start for first page and end for last page)

When done, click on Next Step

Click on Submit to process the document.

# Email

Postal letters can be sent through PostalMethods quickly and easily by sending an email with the letter as an attachment.  The attachment needs to be of a supported file type, and its first page must include the recipient address block in the proper location.  Nothing in the body of the email will display within your document.  Only the attachment.

**Please note:  Email delivery is not HIPAA compliant.**

This is a quick and simple guide for new users wishing to send a letter by email.

## Step-by-step Guide

**Create Your Postal Method's Account:**  If you do not already have an account, go to https://app.secure.postalmethods.com/auth/register to create one.

**Email address of person sending the document:** This address must appear under Account Settings/Email.  Wildcards can be used in this section to allow anyone within that domain to send documents using your account.

*\*\*If you send from a system other than your email account (such as Quickbooks) you may need to add your email address as the **Reply to Address** within that system.*

**To Address:**  The "to address" on your email should always be **send@secure.postalmethods.com**

**Subject:**  The subject of your email can be used to help identify your document within the system.  It is placed in the Description portion of the Processed Documents.  It does NOT appear anywhere in the mailed document.

**Email Body:**  Any content appearing in the email body is ignored.

## Sending a Single Document

**Attachments:**   All attached documents are used to create a single document.  Attachments are handled in the order they were attached.  The first page of the first document attached to your email must contain the recipients postal address in the correct location.

1.  The **recipient address** or "send to address" must be placed in a specific location in order for the system to read it properly and ensure it's visible through the envelope window once printed and folded.  The address should be located between 2.25 inches from the top of the page and 3.25 inches from the top of the page.  This one inch area should provide adequate space for up to 5 address lines.  A single address line should be no wider than 4 inches long.  Click here to download a word and pdf example.
2.  A **return address** is not required, however this is suggested.  The return address can be placed between 0.25 and 1.5 inches from the top of the page and 0.5 inches from the left margin.  If you are a business, your logo can go in this area as well as the address.
3.  **Attach your document(s).**  You can attach multiple documents, however you will only be sending one merged document containing the multiple files.  Be sure and attach the pages in the order wanted within the letter (i.e. upload page 1 first, page 2 second, etc.).

4.  Send the document to **send@secure.postalmethods.com**

*\*\*There is a 25 MB limit on the size of the attachment*

## Sending multiple letters by email

Multiple letters can be sent by zipping the individual documents together into one file and attaching it to the email.  Follow the same instructions as Sending a Single Document to ensure your address placement for each document is correct.

1.  Each document to be mailed must be one file.
2.  Zip together the individual files.  The name of the zip file is not used anywhere in the system.
3.  Attach the file to your email
4.  Send the document to **send@secure.postalmethods.com**
5.  Each document in the zipped file will be treated as one letter

## Checking your letter's status

1.  Login to the PostalMethods Quicksend Portal using the email address and password with which you registered.
2.  Find your letter in Processed Documents.  You can filter by Date Range or Description.
3.  To learn more about the QuickSend Portal, click here.

# Templates

As you are using Compose a Letter, Upload Letter or Mail Merge, you have the option of saving the document as a template.   If you use the same letter or document multiple times, this can save you time.  The Template option allows you to edit or delete any templates that you have saved.

# Address Book

The address book allows you to easily save addresses that you frequently use when composing a letter, uploading a document or using mail merge.

When creating your letter, if the address is already in your address book when you start typing the name it will auto fill in the entire address.

You can import or export your contacts in the address book.  Click on Import Address and download the sample CSV file required for the import.

To import, ensure that your CSV file is in the correct format.  Drag and drop the file or upload and click the Import button.

# Address Verification

Postal Methods allows you to verify addresses at no extra cost.  This is only for US addresses.  An invalid address may not indicate that your letter will not be delivered, however, it is not currently found in the USPS database.

# Processed Documents

After submitting your document, it will go into Processed Documents.

**InProcess** – This status indicates that Postal Methods is currently processing your document

**Processed** – indicates that the document has successfully processed within the system and is waiting for the 4 AM daily download to print and mail.

**Completed** – the document has downloaded for printing and mailing

**Draft** – indicates that you did not complete the process when you were creating a document.

If your document has a red "x" next to the Destination Address, hoover your mouse over the document to determine the issue. If it shows Invalid Send To Address, you can either update your address or click on the red airplane on the far right to "Forcefully Send". If you choose this option, there will be an additional $0.10 postage charge. An invalid address may not indicate that your letter will not be delivered by USPS, however, it is not currently found in the USPS database.



To edit the invalid address, click on the Destination address. You can now update the address. When completed, click on Save. Refresh your screen. If the address is now correct the red x will change to a green checkmark.
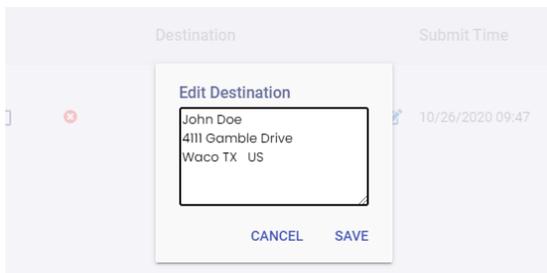


You can delete your document (and funds credited back to your account) as long as the status has not changed to Completed.

Search fields are provided to assist in finding a particular document.

# Error Logs

This can be used to see if any errors have occurred within your account.

# Account Settings

**Emails** – You can choose your options for any emails received such as if you want Color or Black and White and Printing on one side or both sides

If more than one user is allowed to send emails, you can add the address here.  Funds will be deducted from this account any time a document is emailed by addresses on your account.

**API Keys** – API keys for the live and test environment are located here.

**Payment** – You can add your credit card here.  ***Only Super Admin can add funds to an account.***

**Pricing** – Postal Methods has 4 different pricing levels.  The costs can be found here along with options such as Auto Recharge.  Auto Recharge gives you the ability to automatically charge your credit card if your funds get down to $2.00.  Your card will be charged for the plan you are currently using.  ***Only Super Admin have access to pricing.***

**Invoices** – Any time your credit card is charged, you will have a copy of the invoice here.  If there are any charge to your account for custom outside services the invoice will also show here.  ***Only Super Admin's have access to Invoice.***

**Departments** – Postal Methods allows you to add departments and users to your account.  Any user added to your account will use your funds.  Departments assist businesses in separating costs in order to allocate expenses.  ***Only Super Admins have access to departments.***

**Accounts** – Super Admins or Department Admins can add users to your account.  Super Admins can assign a department as well as a role.  If you have a business account, all users should be entered through either the Super Admin or Department Admin.

**Only the Super Admin can change users from one department to another.  The mailings will not move with the user.**

> **Roles:**
> **Super Admin** – Add funds, Add departments, add users, delete users, change user department
> **Department Admin** – Add users within the department, delete users within their department
> **User**  - no special privileges

## Activity
Only available to Super Admins - Activity shows all activity on your account.

## Profile Settings
You can edit your account information such as name, address, email, password.  **\*\*Account username cannot be changed on an account.**