

Postalsoft Quick Start Guide

Create New Layout

There are two ways to create a new layout.

The first way and easiest to make a new layout is to copy an existing layout. Here, you must have an existing layout to open, if not, you must start with the 1st method, starting new.

To copy an existing layout:

- a. Go to File open an existing layout
- b. With your existing layout opened go to File, New, give your new layout a name, make sure that the "Create New Data File" is marked, and then press Next.
- c. Now on this screen you will press "Copy other window's layout" button and this will copy the existing layout that you had open. If you need to make any changes you can do so here. (first, last, address_1, city, state, zip) Press Finish

If you do not have an existing or previous layout to copy you will need to create one.

Go to File>New, give your new layout a name. You will notice that it automatically gives the same name to the database in the line below. Now, make sure that the "Create New Data File" is marked, and then press Next. At this screen you will make any changes you need.

To insert a new field, use the Insert before or after choices. Once you do this, you will name your field and select the kind of field, i.e. normal, and then select the character length. To delete a field, simply click on the field you want to delete and then go down to click on the delete bottom. When done, Press Finish

If for any reason you wish to edit your layout after you have created it,

Simply go to File>Properties>Database. Then you will be at the screen to make changes to the layout

1. Importing your file

- a. Open your new layout and go to File>Import at this point you will enter the file location. Find where the imported file is located for example: c:documents. Choose which file it is and highlight the name. It will show up in the "File Name" then press Open.
- b. At this screen you will see the import format. This is what the program is seeing the file to be (the import format style will be highlighted). Then press Next.
- c. On this screen you will match up the fields in the left-hand side of the screen with the information on the right. (if you are missing something in you layout you can go into file>properties>database, and change or add information to layout) When you are done, press Finish.
- d. The program will come up with how many imported files you had, just press OK.

2. Correct Addresses (make sure to check what case your data is in)

- a. Go to Tools>Correct Addresses>Multi-record.

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- b. A prompt will come up saying "Would you like to create a backup of the database file before address assignment", press No, "All Non-deleted Records", press OK
 - c. At this screen you want to take the check off of "Swap address lines". In the left bottom is Capitalization, make sure that it is set to what your data has. (UPPER, MixeD, lower) press OK. The next prompt will say "Processing records in ZIP sequence should improve performance. OK to switch to ZIP index now?" press Yes. Now the program will process the data in your file. Form 3553-information will come up, put in the information it is asking for, press OK, Done.
3. Optional – Merge/Purge – remove duplicates
 - a. Go to Tools, Merge/Purge See User Guide for all the possibilities of this section
 4. Presort
 - a. Go to Tools, Presort, Sort Settings.
 - b. Choose mail class that your mail will be going out at. (First, Standard A) press Next
 - c. Fill in the information needed for you mailing. (size, weight, thickness) press Next
 - d. Fill in the information for the post office and permit. Press Next
 - e. Choose your presort scheme. (carrier route, automation letter) press Next, Begin presorting. "All Non-deleted Records" press OK. "Presort complete", press OK.
 - f. Fill in the Mailing Information page. This is what will show on the postage statement. Permit Holder, Owner, Mailing Agent information.

To use old printing method (recommended in the beginning)
Go to>Tools>Options>Printing Methods. Check disable labels toolbox.

5. Setting printer options
 - a. Go to Print>Printing Options, you will see that it is setup as folders on the screen, you will click on Printers, you will have to go through each one and make sure that they are setup to the correct printers. Many times the only printers that are selected differently are those for Presorted labels and Non-Presorted labels. If you need to change a printer, highlight the one you want to change and click on "change printer" (bottom left) You will generally want all reports to print to your default printer.
 - b. Back at Print>Presort Printing Options, under "Print label's for"; choose what you want to be printed out. Make sure it has a (check) in the box next to the ones you want printed.
 - c. Again, under Print>Printing Options, click on "Presort Container Tags", make sure to check all options you want, generally all boxes are checked.
 - d. When you have all settings set then press OK
7. Reports
 - a. Go to Print>Reports, now choose your reports. For the post office you will need: 3553 Cass Form, Mail Sort Listing, Postage Statement, USPS Qualification. You are able to

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print all these reports at the same time. Double click on the printer icon next to the report name, it will show a paper coming out of the printer. When you have chosen all reports, press "Batch Print".

- b. Some like to include the Job Summary if you need to keep a record of all the selections that were made throughout the entire mailing.
8. Container Labels
- a. Go to Print, Container Labels, Page/Form Setup, choose the container label you are using, make sure it is highlighted. Press OK
Most use the Tray Label Form 4 and sack label form 5
 - b. Go back in Print, Container Labels, then go into Print then press OK
If you would like to preview the container tags before you print, go to the preview option under Container Tags.
9. Finally, to print labels or printing to any printer, select a Form and a Template.
- a. Form go to Print>Presorted or Non-Presorted labels, then choose Page/Form.
Select a form or create a new one.
 - b. Template go to Print>Presorted or Non-Presorted labels, then choose
Template Design. Select a Template or create a new one.
You can also select forms and templates by going to Print>Presorted Labels>Preview.

If you would like to preview the labels before you print, go to the preview option under Print>Presorted Labels>Preview.

General notes:

You can set up many defaults with this program, i.e. where the directories are for importing and exporting and where you store your lists, which post office you deliver your mail, many of the screen setting can be set. You will find most of the defaults can be selected by going to tools>options.