# IMB ROADMAP

## Step 1

## Obtain a Mailer Identifier.

You can apply for Mailer Identifier with the USPS Business Mail Entry Unit or the Mailpiece Design Analyst. The Business Mail Entry Unit can be located at the following website: <http://www.usps.com/nationalpremieraccounts/findlocators.htm>.

The Mailpiece Design Analyst may be contacted via an online tool at: <http://pe.usps.com/mpdesign/mpdfr_mda_lookup.asp>

The mailer Identifier will be either a 6 or 9 digit code. All 6 digit Mailer Identifiers begin with “0 through “8” in the first digit. All 9 digit Mail Identifiers begin with a “9”.

The Mail Owner who mails 10 Million or more pieces annually will be assigned a 6 digit Mailer Identifier number. It is important for large volumes of mail to have a 6 digit Mailer Identifier so that there will be sufficient room in the barcode to have uniqueness for the mail piece. There are 9 digits available for the unique identification of the mail piece.

Mail Owners who mail less than 10 million pieces annually will be assigned a 9 digit Mailer Identifier. With this choice, the mailer will have 6 digits available for a unique identifier in the barcode.

## Step 2

## The Composition of the Intelligent Mail Barcode.

There are 5 fields that must be defined in the IMB:

1. Barcode ID- This is used to define the presort makeup in conjunction with an Optional Endorsement Line. Normally, this is left as a “00” unless you are dealing with flat mail bundles that have the Optional Endorsement Line (OEL). In that case, the barcode must contain the OEL that corresponds to the correct sortation level.
2. Service Type Identifier- This is used to define the mail clan and the additional services that are requested such as OneCode Confirm or OneCode ACS. If you are using the IMB only for automation discounts and not using the Full Service IMB, the Service Type you will use “700” in this field for First Class Mail and “702” for Standard Mail. Business Reply or Qualified Business Reply Mail will have a “708” in this field. The entire list of Service Type Identifiers is described in A Guide to Intelligent Mail for Letters and Flats. This is located in Appendix A: Service Type Identifier (STID) Matrix: starting on Page 100 of the guide located at:

<http://ribbs.usps.gov/intelligentmail_guides/documents/tech_guides/GuidetoIntelligentMailLettersandFlats.pdf>

1. Mailer ID (6 or 9 digit)
2. Serial number (6 or 9 digit)
   1. 6 or 9 digit
   2. Unique mailpiece identification
3. Routing Code - In order to obtain automation discount, the address must CASS certified.

This field then contains one of the following:

* 1. Zip code – 5 digit
  2. Zip+4- 9 digit
  3. Delivery point – 11 digit

## Step 3

## Full Service option

The next step involves getting certified with the Post Office. The Mail.dat file is the mechanism used to communicate with the USPS the information for your mailpiece. The Mail.Dat file is sent through Postal One. The use of this service is required for the Full Service Option. There are three ways of submitting data to the USPS electronically. Postal Wizard, Mail.Dat and Mail.XML are those three options.

The Postal Wizard is a web based service where you fill out information about the mailing and then submit the presort and price documentation for a mailing.

The Mail.Dat file is automatically prepared and submitted to the Postal One service using your software. There are several steps involved in using the Mail.Dat file for the Full Service Option:

1. Purchase a Mail.Dat user license from IDEAalliance. This may be purchased annually for $325 or a lifetime fee of $625.
2. Purchase the Mail.Dat service from the PAVE/CASS software company. Normally this is an optional service that is provided by those companies such as Satori. Transformations is offering this license for a one-time fee of $900 on the Satori product line.
3. Create a sample Intelligent Mail Barcode using the specifications contained in Step 2. Transformations has the IMB barcode font available for use in Uluro.
4. Create and print Intelligent Mail Tray and Container labels. These are part of the Satori system as well.
5. After the IMB is created and verified, then you need to apply for access to the Business Customer Gateway. The application process is available online at [http://www.usps.com](http://www.usps.com/). This normally involves contact with the Business Mail Entry Unit (BMEU) or the Business Mailer Support (BMS). Postal One! Customer support must be contacted to gain entrance into the Business Customer Gateway. Once you have obtained access, a set pattern of steps must be followed to validate your IMB barcode and the Mail.Dat procedure through their testing scenario.
6. Testing Scenario:
   1. Send the Help Desk at the USPS an email that you have things ready to utilize electronic interchange. This email should contain the following information:
      1. Company Name
      2. Contact Name
      3. Phone Number
      4. Data Method- Mail.Dat (we are not supporting the Mail.XML currently)
   2. The Help Desk will contact you with test scenarios.
   3. A Test Environment for Mailers (TEM ) will be made available for you.
   4. You will take the test scenarios, generate IMBs and Mail.Dat files for testing.
   5. Send the tests through the TEM.
   6. The Help Desk will monitor the test and provide technical assistance for you to complete the test successfully.
   7. The Help Desk will then notify the BMEU or the BMS that you have completed testing.
   8. Next, a parallel test will be scheduled to test the procedures and files against actual production systems. This parallel will take 5 consecutive business days where you will send the Mail.dat file and postage statements through the BCM. Hardcopy statements and documentation must also accompany your mailings during this time. A comparison between the hardcopy and the electronic documentation is made to ensure matching.
   9. After the parallel test is completed satisfactorily, the BMEU or BMS will give final approval to move you to a production status. They will conduct an on-site review at that time. The hardcopy statements can then be discontinued.
7. Once approved to use the Business Customer Gateway, you can now take advantage of several programs available for Full Service mailings

## Step 4

Sign up with the Mailpiece Design Analyst (MDA) to use these services.

## OneCode ACS –

This is a service provided by the USPS for full service IMB participants. The “Address Service Requested” endorsement, the Ancillary endorsement, and key line in the address block can be eliminated. This service is free for IMB Full Service users. Some mailers use this in place of NCOA or Move Update to get the correct address, but most do not. The electronic sorting of the data from the service back to the original customer doing the mailing can be somewhat cumbersome, whereas the NCOA report is immediately available and can be sent to your customer prior to the mailing being sent if you so desire. The ACS service can catch late additions to NCOA, but should be viewed as a Post-mailing service that supplements the traditional NCOA services that you can provide to your customers.

## OneCode Confirm

This is the tracking information for each mailpiece that is sent out with an IMB. You can track outgoing mail (Destination Confirm Service) or incoming mail (Origin Confirm service). Electronic Records are sent to you with this information when the barcodes are processed by the USPS.

## Step 5 Confirm and Report

If tracking is wanted on your mail, you will have to provide a way to match up that data from the OneCode Confirm Service in your system. Transformations will assist you in this effort. This will involve:

1. Setting up a way to download the tracking file from the USPS.
2. Matching that file with the individual mail piece.
   1. Setting up an index by Mailer ID and Serial Number to look through all submissions.
   2. Extract the destination service information from the OneCode Confirm file.
   3. Update the mail piece with that information.
3. Prepare reports based on the information:
   1. Submission Number
   2. Mail Piece Number
   3. Mail Piece Name
   4. Mail Piece Address
   5. Submission Date
   6. Mailed Date
   7. Delivered Date