

TheRaiser'sEdge[®] Enterprise[™]

PostalSaver Guide for Australia

022608

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PostalSaver Guide for Australia

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What Is In This Guide?

In the *PostalSaver Guide for Australia*, you learn to qualify for PreSort Letters Service discounts on mailings. *PostalSaver* is a valuable tool that automates the process of sorting mailings and filling out reports to save you time and effort in qualifying mailings for discounts. This guide includes the following information.

- “Qualifying for PreSort Letters Discounts” on page 10
- “Requirements” on page 10
- “Setting the PostalSaver options” on page 13
- “Running the Sort Wizard to Set PostalSaver Options” on page 13
- “Loading PostalSaver Options from an Existing Parameter File” on page 29



How Do I Use These Guides?

The Raiser’s Edge Enterprise user guides contain examples, scenarios, procedures, graphics, and conceptual information. Side margins contain notes, tips, warnings, and space for you to write your own notes.

To find help quickly and easily, you can access the *Raiser’s Edge* documentation from several places.

User Guides. You can access PDF versions of the guides by selecting **Help, User Guides** from the shell menu bar or by clicking **Help** on the Raiser’s Edge bar in the program. You can also access the guides on our Web site at www.blackbaud.com. From the menu bar, select **Support, User Guides**.

In a PDF, page numbers in the Table of Contents, Index, and all cross-references are hyperlinks. For example, click the page number by any heading or procedure on a Table of Contents page to go directly to that page.

Help File. In addition to user guides, you can learn about *The Raiser’s Edge* by accessing the help file in the program. Select **Help, The Raiser’s Edge Help Topics** from the shell menu bar or press **F1** on your keyboard from anywhere in the program.

Narrow your search in the help file by enclosing your search in quotation marks on the Search tab. For example, instead of entering Load Defaults, enter “Load Defaults”. The help file searches for the complete phrase in quotes instead of individual words.

W e l c o m e



Icons

The following icons are used in the side margins to denote additional information such as notes, warnings, time-savers, or definitions. You can also use these margins to write your own notes.



The notepad symbol designates a note or tip related to the information in the main text column.



The traffic light indicates a cautionary note. Generally, we use this icon to point out a step that may have unwanted results.



The clock symbol designates a shortcut or timesaving action.



The dictionary symbol designates the definition of a frequently used term.

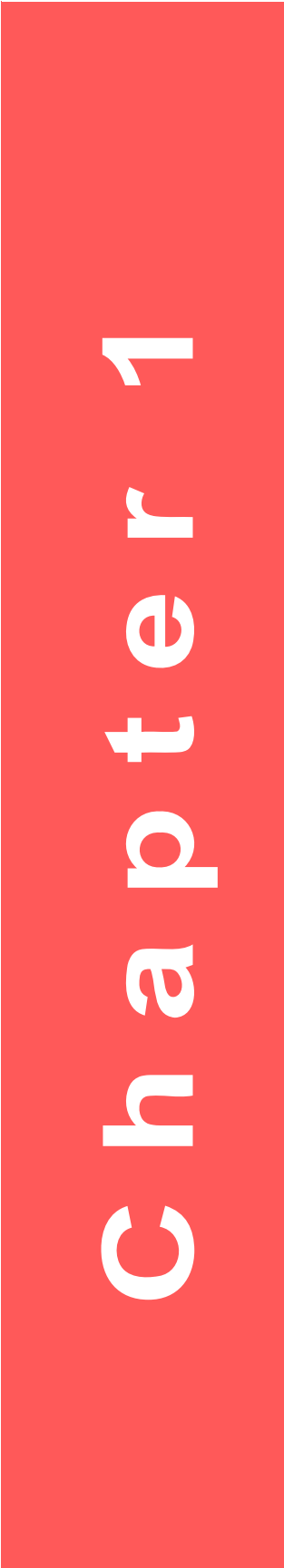
PostalSaver Tab and PreSort Letters Discounts

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PostalSaver is updated every three months. To make sure you have the most current version before you run *PostalSaver*, visit the Downloads page of the Blackbaud Web site at <http://downloads.blackbaud.co.uk>. For information about downloading and updating *PostalSaver*, see “Installing and Updating PostalSaver” on page 4.



Some *Mail* tasks require additional information to activate the PostalSaver tab, such as selecting an address field on the Fields to Include tab.

Mailings are important to your work as a nonprofit organisation. *PostalSaver* is a valuable tool that enhances *The Raiser's Edge* and automates the process of sorting mailings and filling out reports. This saves you time and effort in qualifying mailings for Australia Post PreSort Letters discounts.

When you use *PostalSaver*, the PostalSaver tab appears on most *Mail* tasks. With your selections on the PostalSaver tab, you create a parameter file that defines how to sort the mailing according to Australia Post guidelines. You can print the complete reports required by Australia Post to accompany mailings qualifying for PreSort Letters discounts. *PostalSaver* and the PostalSaver tab help you qualify for reduced rates offered for bulk mailings. You can use the PostalSaver tab in several *Mail* tasks.

- Appeal Cards
- Donor Acknowledgement Letters
- Envelopes
- Follow-up Letters
- Honour/Memorial Acknowledgement Letters
- Labels
- Phonathon Forms
- Receipts
- Reminders
- Renewal Notices
- Volunteer Follow-up Letters

You can use the PostalSaver tab to sort your mailing and qualify for discounts offered by Australia Post.

Category	Value
Sort	
Type	PreSort Letters
Payment Type	Permit Imprint
State of Deposit	Australia Capital Territory
Charity Mail	Yes
Piece	
Thickness	0.4 mm
Width	110 mm
Length	220 mm
Weight	5 grams
Min Per Tray	300
Max Per Tray	1239
Reports	
Manifest	Will print

Run PostalSaver. To use the PostalSaver tab to sort and batch a mailing according to Australia Post guidelines, tick the **Run PostalSaver** checkbox. All selections on the PostalSaver tab are enabled.

Certify addresses (this will not update addresses in the database).

When you use *AddressAccelerator* as your address correction service, you can certify all addresses in a specific mailing before you print the mailing. To certify, tick the **Certify addresses** checkbox. Changes to addresses are not updated on the constituent record. You must manually update address changes on the constituent record. For more information about this address correction service, see the *AddressAccelerator Guide for Australia* on Blackbaud's Web site, www.blackbaud.com.au.

Options. To set up how the program uses *PostalSaver* to sort a mailing, click **Options**. You can select to run the Sort Wizard to set up the *PostalSaver* options or load the option settings from an existing parameter file to use as a template. For more information about the available **Options**, see "Options" on page 12.

Frequently Used Terms

To effectively use mail tasks for your organisation's fundraising efforts, you should have a basic understanding of common mail terms. If you find an unfamiliar term when you read this or any guide in *The Raiser's Edge* documentation, search the online glossary in the help file.

Address format: Correct Australia Post required address formatting is as follows:

Mrs Angela Lessing
27 Stokes Street
TOWNSVILLE QLD 4810

Address Matching Summary (AMAS) Report. To obtain a barcode pricing discount rate, you must submit an AMAS report with the mailing, as evidence that AMAS-approved address matching software was used to process the mailing. *PostalSaver* completes and prints the AMAS report.

Barcode. To qualify a mailing for discounts, Australia Post requires a barcode on mailing pieces. The Address barcode includes the Postcode and Delivery Point Identifier (DPID).

DPID. DPID stands for Delivery Point Identifier. A DPID is an eight-digit barcode assigned to each delivery point, or address. Blackbaud's *AddressAccelerator* module applies a DPID to each address to ensure your mailings reach their intended recipients quickly. Applying a DPID to your mailings also qualifies you for further discounts. For more information about *AddressAccelerator*, see the *AddressAccelerator Guide for Australia* on Blackbaud's Web site, www.blackbaud.com.au.

Lodge. Lodge means to post a mailing from a postal facility, usually in bulk, sorted in trays, and meeting the particular service requirements.

Manifest Report. A Manifest Report provides details of the breakdown of a mailing for PreSort Letters lodgement. For example, it shows the destination, sort level, barcode status, and tray placement of the various groupings of the mailing.

Postcode. The postcode is a coding system that identifies the post office or metropolitan area associated with an address. The postcode is a vital part of all addresses in Australia. A postcode is a four-character number included as part of each address to indicate a particular delivery location.

PreSort Letters. If you post at least 300 letters in a mailing and barcode and sort your mailing pieces into appropriately labelled trays, the PreSort Letters service is available. The PreSort Letters service qualifies you for discount rates on mailings. Blackbaud's *PostalSaver* module helps you sort mailings to qualify for discounts. For information about the PreSort Letters Service requirements, see the *PostalSaver Letters Service Guide* entry below.

PreSort Letters Service Guide. This Australia Post publication outlines the requirements for barcoded and unbarcoded mailings to qualify for PreSort Letters Service discounts. To obtain a copy, visit the Australia Post Web site at www.auspost.com.au, or telephone 13 13 18.

Tray Labels. Tray labels containing a barcode are required for the barcoded and unbarcoded PreSort Letters. A tray label printing utility is available for download from the Australia Post Web site at www.auspost.com.au.

Installing and Updating PostalSaver

The *PostalSaver* data files are updated every three months. To access the information in the *PostalSaver* data files, you must download and install them from www.blackbaud.co.au.


If you work on a network, you can install the data files on the server or in a shared folder on any computer all users can access. To link the files to *The Raiser's Edge*, you must enter the path to the data files in User Options.


After you install the *PostalSaver* data files on a workstation or server for the first time, you must also update Satori *MailRoom ToolKit*. *PostalSaver* uses *MailRoom ToolKit* to sort your mailing and take advantage of Australia Post discounts.

➤ Downloading and installing the PostalSaver data files

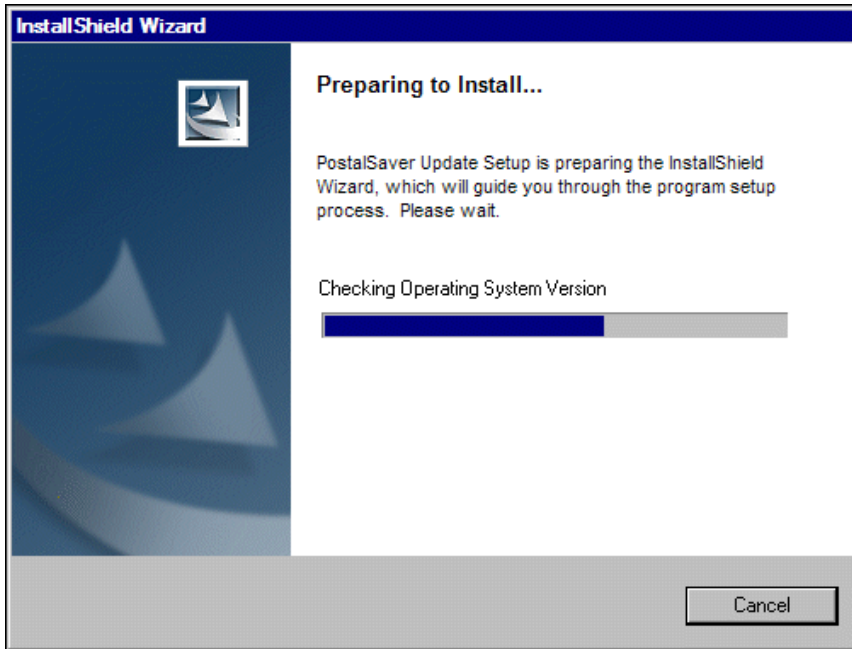
The *PostalSaver* data files are updated every three months. To access the information in the *PostalSaver* data files, such as to update or install on a workstation for the first time, you must download and install them from www.blackbaud.com.au.

1. Access the Downloads page of the Blackbaud Web site at www.blackbaud.com.au.
2. Download and install any relevant *PostalSaver* updates.

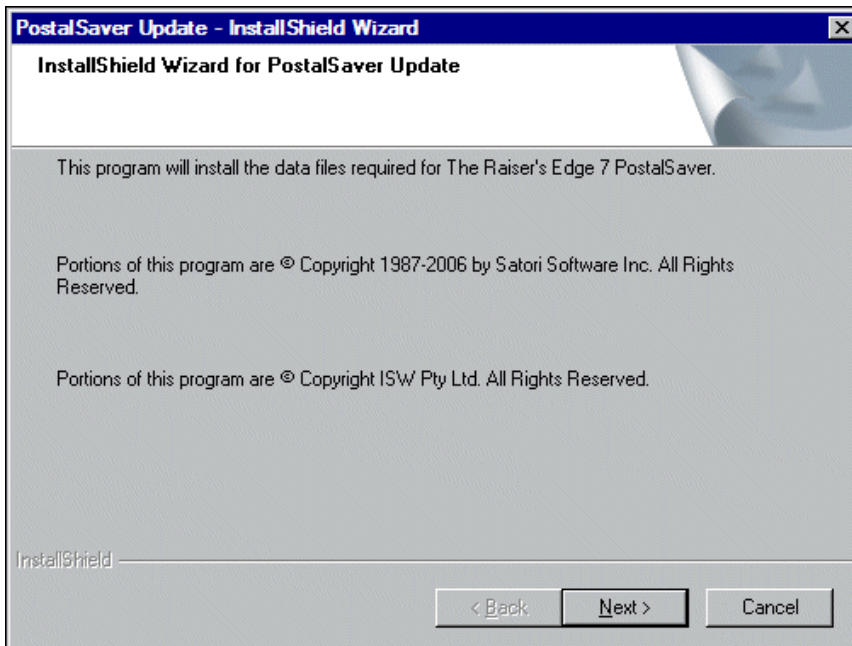
 If you use *AddressAccelerator* as your data service, update the *AddressAccelerator* data files instead. When you update *AddressAccelerator*, both *PostalSaver* and *AddressAccelerator* files update. For more information about *AddressAccelerator*, see the *AddressAccelerator Guide for Australia*.

 The Downloads page is a secured resource on the Blackbaud Web site. To access the Downloads page, you must log in.

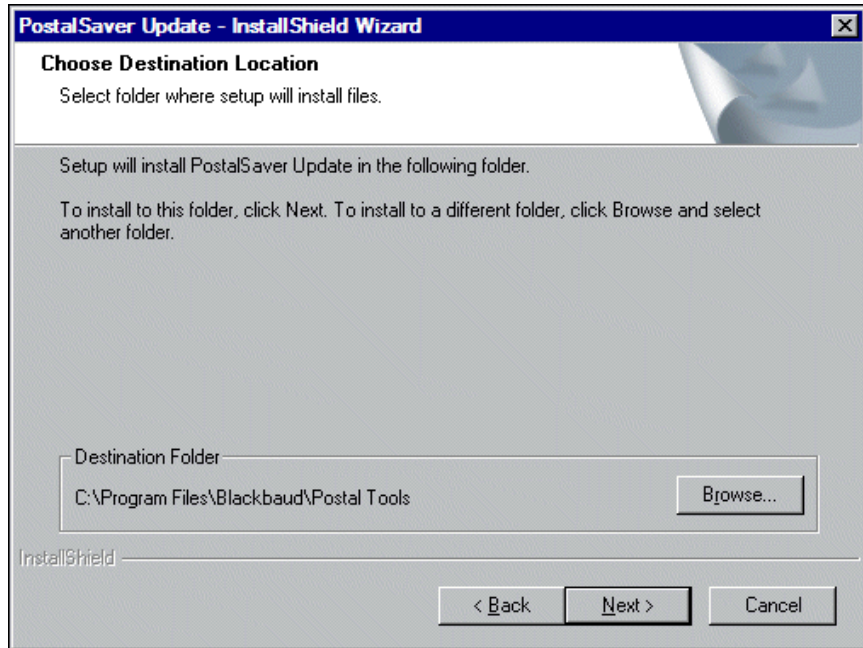
3. Access and run the downloaded PostalSaverDatafiles.exe file. The InstallShield Wizard Preparing to Install screen appears.



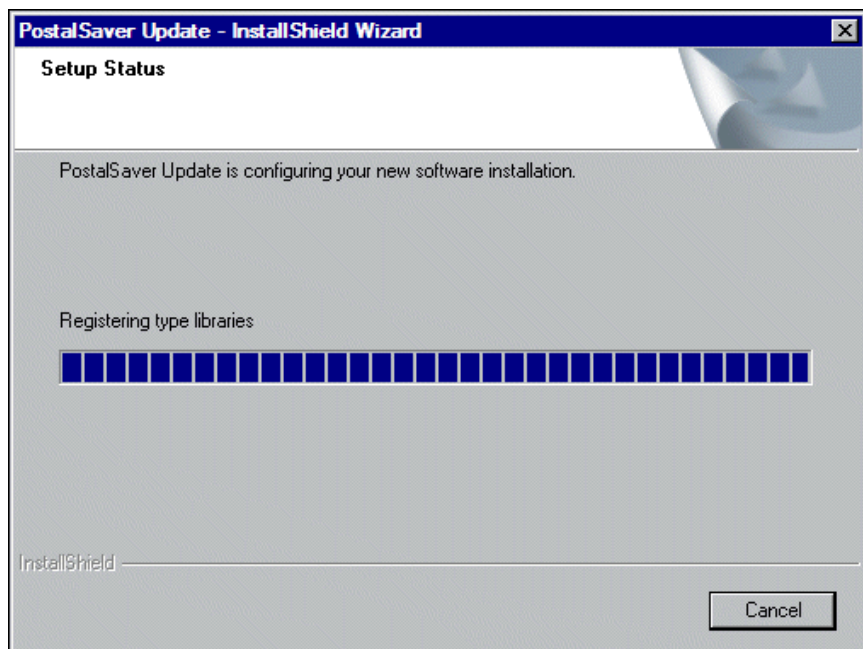
When the wizard is ready, the InstallShield Wizard for PostalSaver Update screen appears.



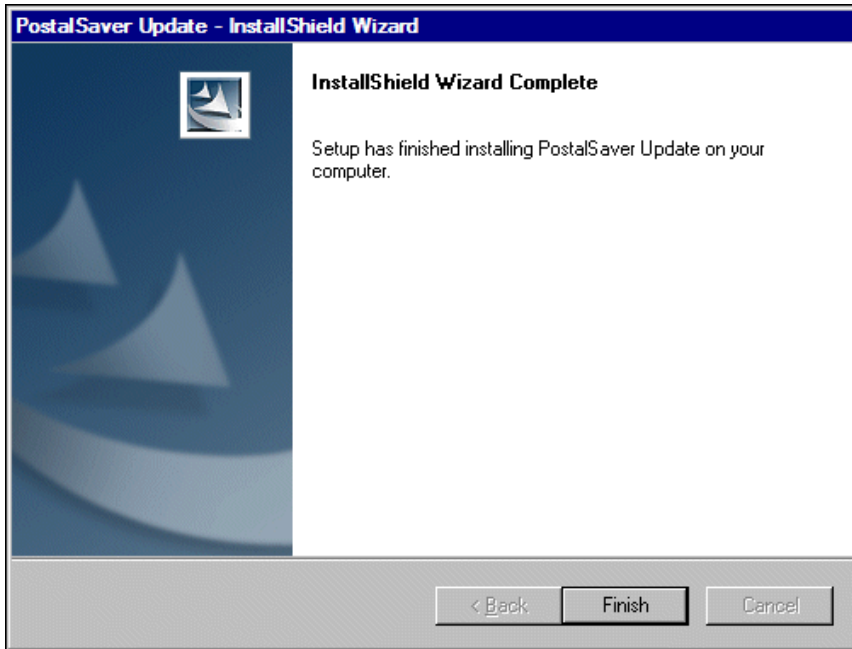
4. Click **Next**. The Choose Destination Location screen.



5. In the **Destination Folder** frame, enter the location where you want the wizard to install the *PostalSaver* update files. By default, the location is C:\Program Files\Blackbaud\Postal Tools. To map to a different location, click **Browse**.
6. Click **Next**. The wizard installs the *PostalSaver* data files, and the Setup Status screen tracks the installation progress.

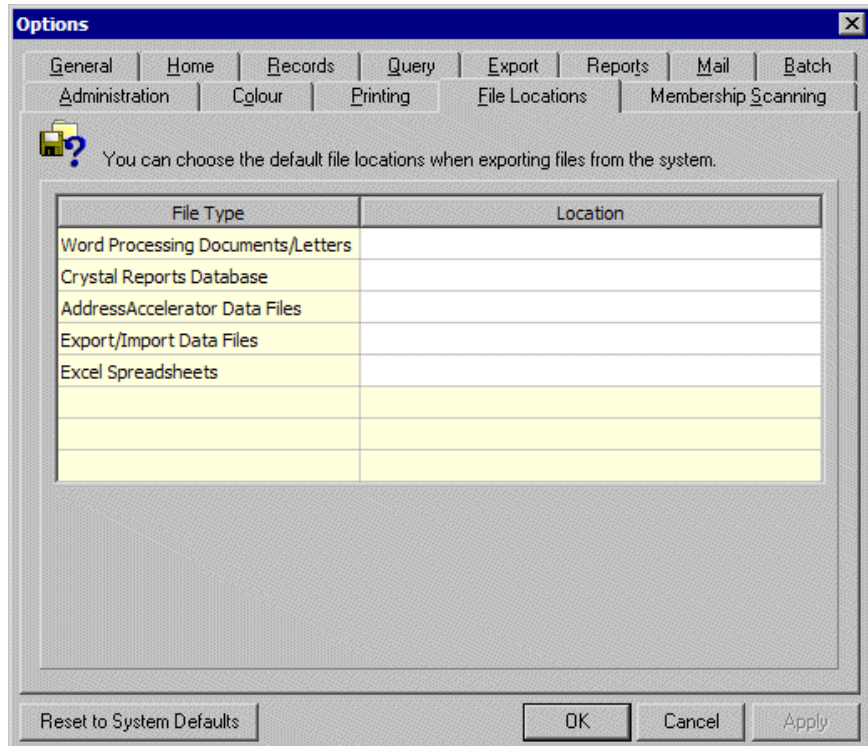


When the installation is complete, the InstallShield Wizard complete screen appears.




7. Click **Finish**.
8. After you install the *PostalSaver* data files on a workstation or server for the first time, install the Satori *MailRoom ToolKit* update files. If you install the *PostalSaver* data files on a server, install the *MailRoom ToolKit* update files on each workstation to use *PostalSaver*. For a procedure on how to install the *MailRoom ToolKit* update files, see "Installing the MailRoom ToolKit update files" on page 8.
9. Log into *The Raiser's Edge*.
10. On the menu bar, select **Tools, User Options**. The Options screen appears.

11. Select the File Locations tab.




12. On the **AddressAccelerator Data Files** row of the grid, click in the **Location** column. An ellipsis appears.
13. Enter the path to the *PostalSaver* data files.

 By default, the *PostalSaver* data files are installed at C:\Program Files\Blackbaud\Postal Tools.

To map to the location, click the ellipsis. The Browse for Folder screen appears so you can locate the data files. When you locate the files, select the folder and click **OK**. You return to the File Locations tab, and the selected **Location** appears in the **AddressAccelerator Data Files** row.

14. Click **Apply**.
15. Click **OK**. You return to the shell page of *The Raiser's Edge*.

 To get maximum performance from the newly installed data files, you may need to close and reopen *The Raiser's Edge* or restart the workstation.

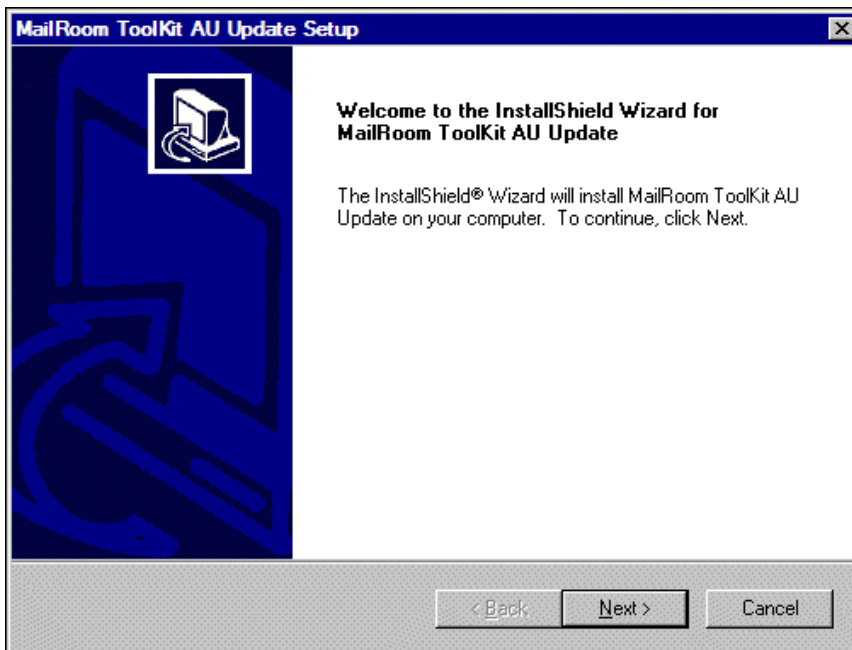
You can now use *PostalSaver* to sort your mailing and take advantage of PreSort Letters discounts. For information about *PostalSaver* and Australia Post discounts, see “Qualifying for PreSort Letters Discounts” on page 10.

➤ Installing the MailRoom ToolKit update files

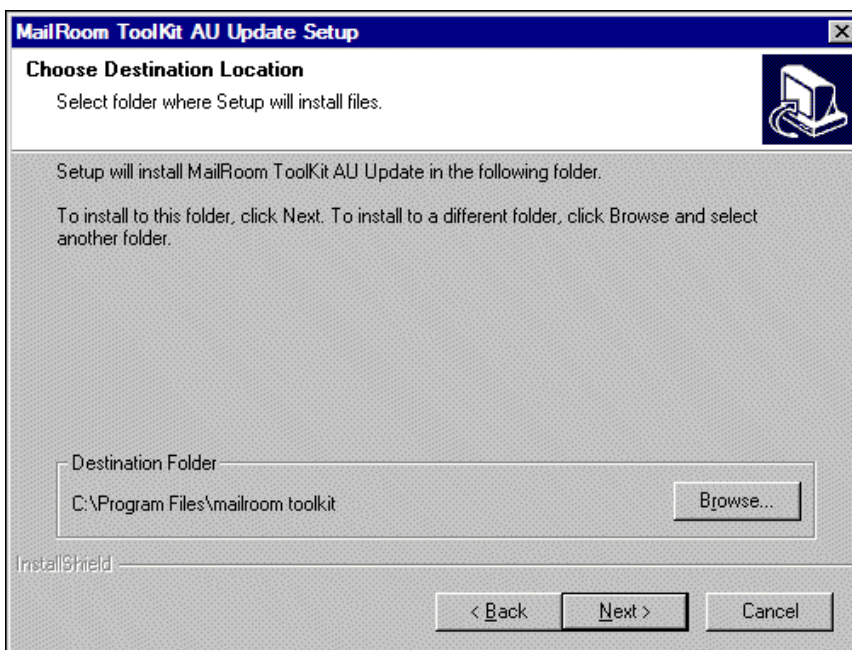
After you first install the *PostalSaver* data files on a workstation or server, run the installation wizard to install the Satori *MailRoom ToolKit* update files. If you install the *PostalSaver* data files on a server, you must install the *MailRoom ToolKit* update files on each workstation to use *PostalSaver*. *PostalSaver* uses *MailRoom ToolKit* to help sort your mailing and take advantage of Australia Post PreSort Letters discounts.

1. Update the *PostalSaver* data files. For information about how to update the *PostalSaver* data files, see “Downloading and installing the PostalSaver data files” on page 4.

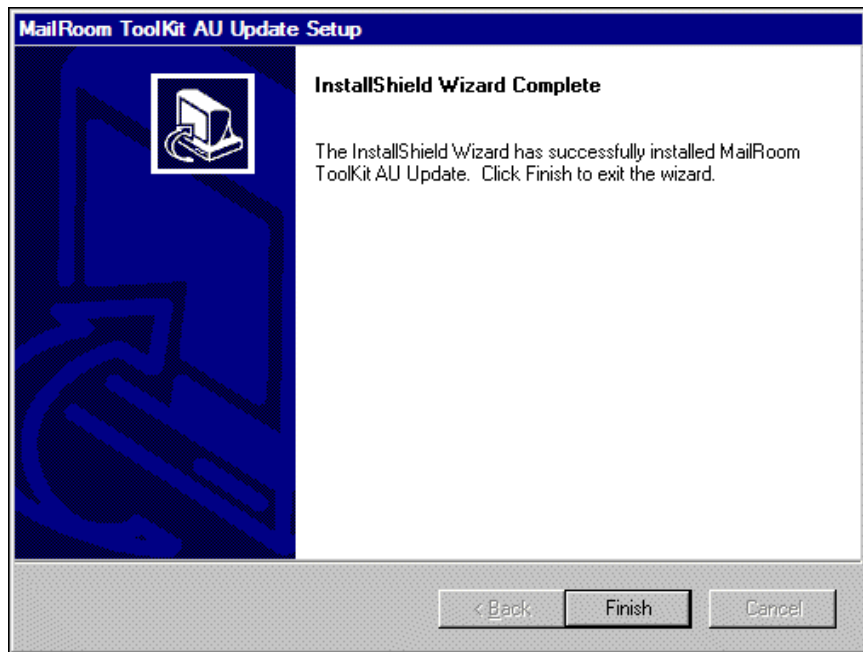
2. Access the Postal Tools directory where you have the *PostalSaver* data files installed on the workstation. By default, the location is C:\Program Files\Blackbaud\Postal Tools.
3. Open the AUUpdate.exe file. The wizard extracts the files needed to install the *MailRoom ToolKit* update files. When the wizard finishes extracting the necessary files, the MailRoom ToolKit AU Update Setup welcome screen appears.



4. Click **Next**. The Choose Destination Location screen appears.



5. In the **Destination Folder** frame, enter the location where you want the wizard to install the *MailRoom ToolKit* update files. By default, the location is C:\Program Files\mailroom toolkit. To map to a different location, click **Browse**.
6. Click **Next**. The wizard installs the *MailRoom ToolKit* update files in the **Destination Folder**. When the update is complete, the InstallShield Wizard Complete screen appears.



7. Click **Finish**.

Qualifying for PreSort Letters Discounts

To be eligible for certain discounts, you must sort your mailing according to the requirements of Australia Post. When you use *PostalSaver*, the PostalSaver tab appears on most mail tasks in *Mail*. To help you take advantage of the reduced rates for PreSort Letters service, *PostalSaver* sorts addresses in postcode order.

In conjunction with *PostalSaver*, you can use the address correction and certification service *AddressAccelerator* to take full advantage of Australia Post discounts. For more information about correcting and certifying addresses, see the *AddressAccelerator Guide for Australia* on Blackbaud's Web site, www.blackbaud.com.au. To access the user guides, select **Support, User Guides** from the action bar.

Requirements

To qualify for PreSort Letters service discounts, your mailing must meet the following requirements.

- Include at least 300 mail pieces.

- Mail pieces must be of the same size and weight categories.
- 90% of the mail pieces must be barcoded.
- Mail pieces must be lodged in appropriately-labelled trays.
- All addresses must be in Australia.
- All addresses must be standardised and certified.

For more information about address correction and certification, see Blackbaud's *AddressAccelerator Guide for Australia* on Blackbaud's Web site, www.blackbaud.com. To access the user guides, select **Support, User Guides** from the action bar. We also recommend you read the Australia Post publication, *Address Presentation Standards*. To obtain a copy, visit the Australia Post Web site at www.auspost.com.au, or call 13 13 18.

For more information about acquiring a PreSort Letters Lodgement service agreement, contact your local post office. For more detailed information about PreSort requirements, see the Australia Post *PreSort Letters Service Guide*.

If you do not have enough records included in your mailing when you preview or print the mailing, a message appears telling you so.

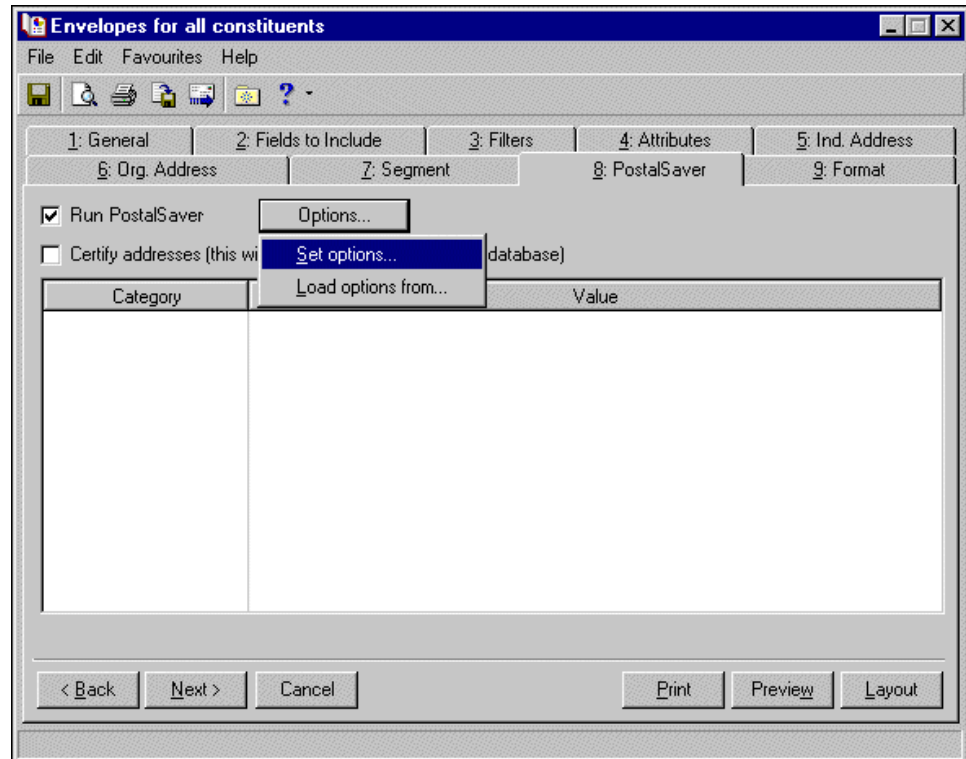


To preview or print the mailing, click **Yes**. However, you cannot run *PostalSaver* or print reports that should accompany the mailing for discount purposes.

If your mailing includes enough records to meet the Australia Post minimum requirements and you still receive this message, check the options you selected on the Sort Wizard. For more information about the Sort Wizard, see "Running the Sort Wizard to Set PostalSaver Options" on page 13.

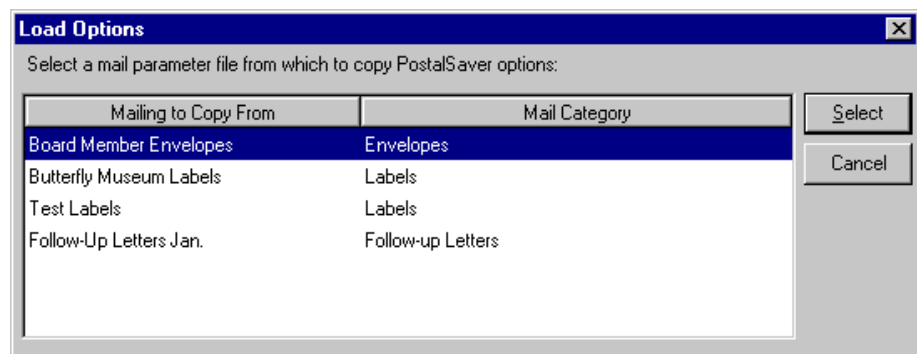
Options

When you tick the **Run PostalSaver** checkbox on the PostalSaver tab, the **Options** button is enabled. To set up how the program uses *PostalSaver* to sort your mailing, click **Options**. A submenu appears.



Set options. To create a new parameter file for the mailing, select **Set options**. The Sort Wizard opens so you can create a new parameter file for a mailing. For more information about how to create a new parameter file, see “Running the Sort Wizard to Set PostalSaver Options” on page 13.

Load options from. To use an existing parameter file for the mailing, select **Load options from**. The Load Options screen appears. From the Load Options screen, you can select an existing parameter file from which to copy the *PostalSaver* options. For more information about copying an existing parameter file, see “Loading PostalSaver Options from an Existing Parameter File” on page 29.

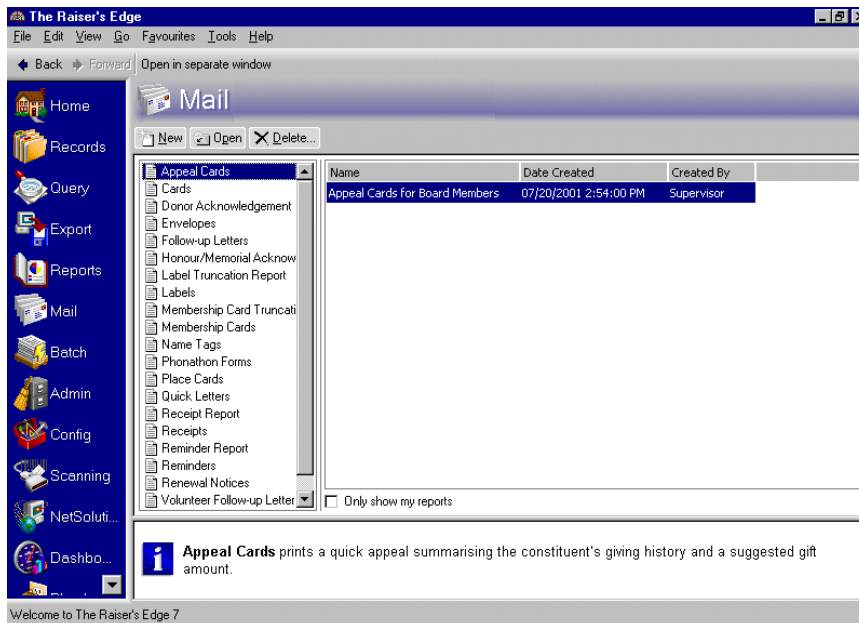


Running the Sort Wizard to Set PostalSaver Options


PostalSaver is a valuable tool that enhances *The Raiser's Edge* by automating the process of sorting mailings and completing reports. This saves you time and effort in qualifying mailings for PreSort Letters Service discounts. With selections on the PostalSaver tab, you create a parameter file that defines how to sort the mailing according to Australia Post guidelines. To create a new parameter file for the mailing, on the PostalSaver tab, click **Options** and select **Set options**. The Sort Wizard opens so you can create a new parameter file for a mailing.


➤ Setting the PostalSaver options


1. On the Raiser's Edge bar, click **Mail**. The Mail page appears.



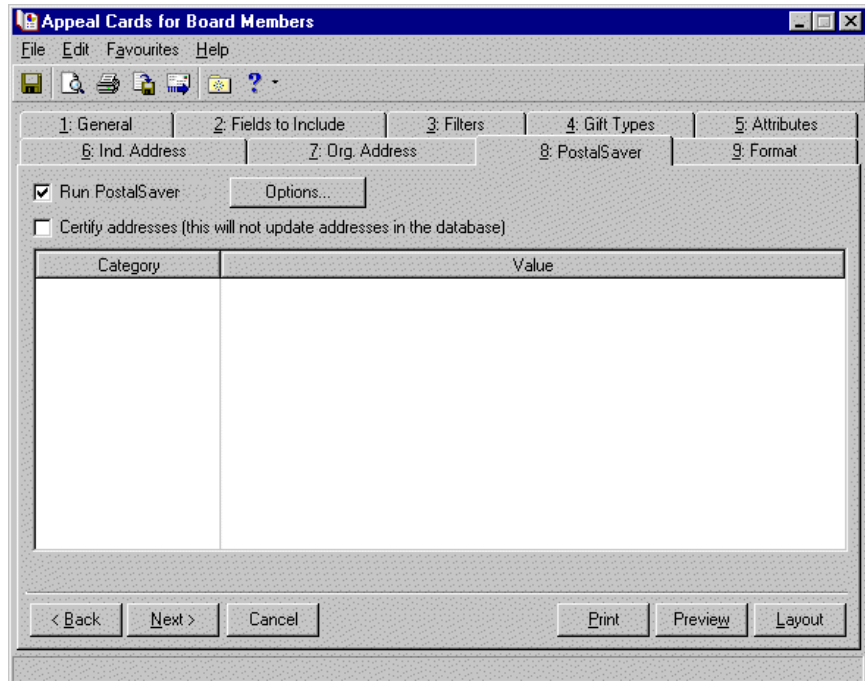
2. From the list on the left, select a mail task. For example, select **Appeal Cards**.
3. From the grid on the right, select an established mailing and click **Open** on the action bar or, to create a new one, click **New**. For more information about creating a mailing, see the *Mail Guide*. The mail task screen appears.

 *PostalSaver* is updated every three months. To make sure you have the most current version before you run *PostalSaver*, visit the Downloads page of the Blackbaud Web site at <http://downloads.blackbaud.co.uk>. For information about downloading and updating *PostalSaver*, see “Installing and Updating PostalSaver” on page 4.

 For this procedure, Appeal Cards is used as an example mail task. Because the steps are similar, procedures for other mail tasks with the PostalSaver tab are not repeated in this section. Depending on the options you choose for other mail tasks, you may skip of these steps and screens.

 Make sure to include an address field on the Fields to Include tab, or the PostalSaver tab will not be accessible. Make sure also to select **Address barcode**, or you will get a warning message when you try to print the mailing.

4. Select the PostalSaver tab.



5. Tick the **Run PostalSaver** checkbox.
6. If you use *AddressAccelerator* as your data service and, in User Options, enter a valid path to the *AddressAccelerator* data files, the **Certify addresses** checkbox appears. To certify addresses for the mailing, tick the **Certify addresses** checkbox. For more information about this address correction service, see the *AddressAccelerator Guide for Australia*.

Ticking this checkbox certifies the addresses for this particular mailing only. Address information is not corrected or certified on the constituent record. You must manually update address changes on the constituent record.

7. To create new sorting options for the mailing, click **Options** and select **Set options** from the submenu. The postal classification screen of the Sort Wizard appears. On this screen, verify the classification of your mailing and enter the date you send the mailing. Also, select the state from which the mailing is deposited. For information about completing this screen, see “Sort Wizard Postal Classification Screen” on page 22.

Sort Wizard

Postal Classification

PreSort Letters

The PreSort Letters service requires a minimum of 300 barcoded letters with unbarcoded letters not exceeding 10% of the total lodgement. Remaining letters will be included at the full rate.

Mailing Date

Friday, 2 February 2007

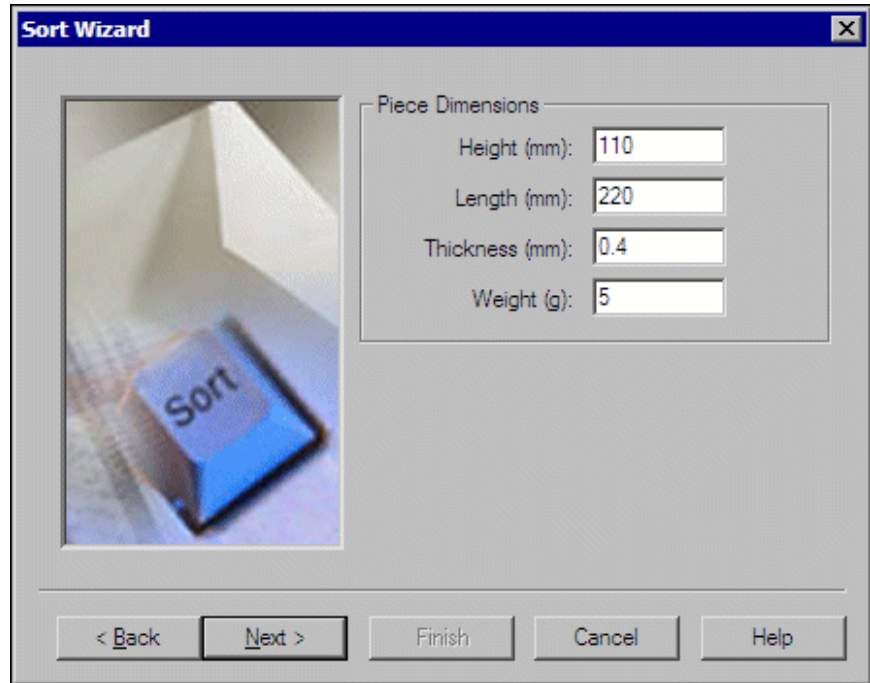
Delivery State

Select State of Deposit: ACT

< Back Next > Finish Cancel Help

To select an existing parameter file from which to use the selected discount options, click **Options** and select **Load options from**. For more information about using an existing parameter file, see “Options” on page 12.

8. Click **Next**. The Sort Wizard piece dimensions screen appears. Enter the dimensions and weight of an individual mail piece representative of the mailing. For information about completing this screen, see “Sort Wizard Piece Dimensions Screen” on page 22.



9. Click **Next**. The Sort Wizard payment type screen appears. Select the payment method used to pay for the postage. Also, enter the minimum and maximum number of mail pieces per tray and specify whether the mailing qualifies for Charity Mail discounted rates. For information about completing this screen, see “Sort Wizard Payment Type Screen” on page 24.

Sort Wizard

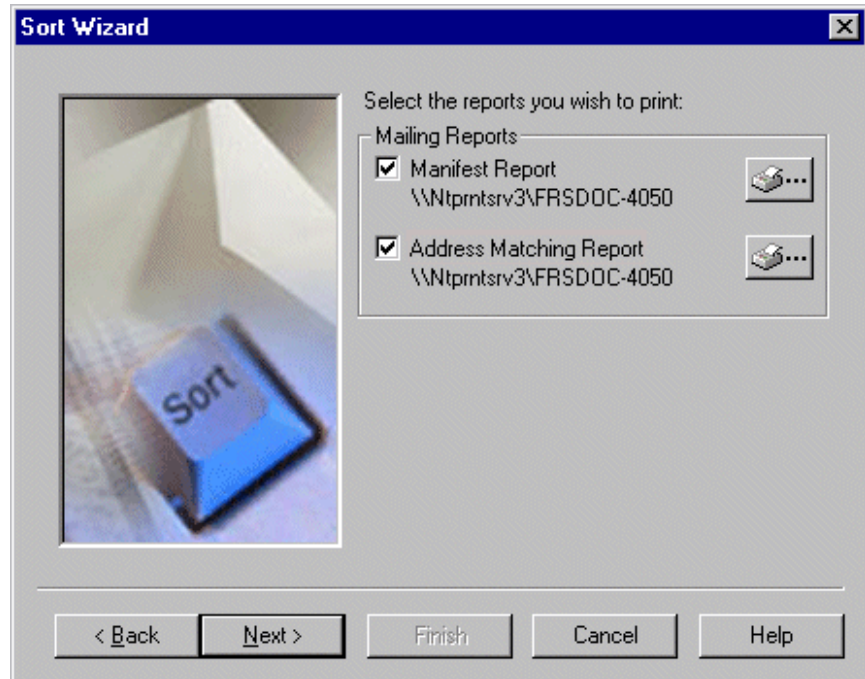
Payment Type
Payment Method: Permit Imprint

Pieces Per Tray
Minimum Pieces Per Tray: 300
Maximum Pieces Per Tray: 1239

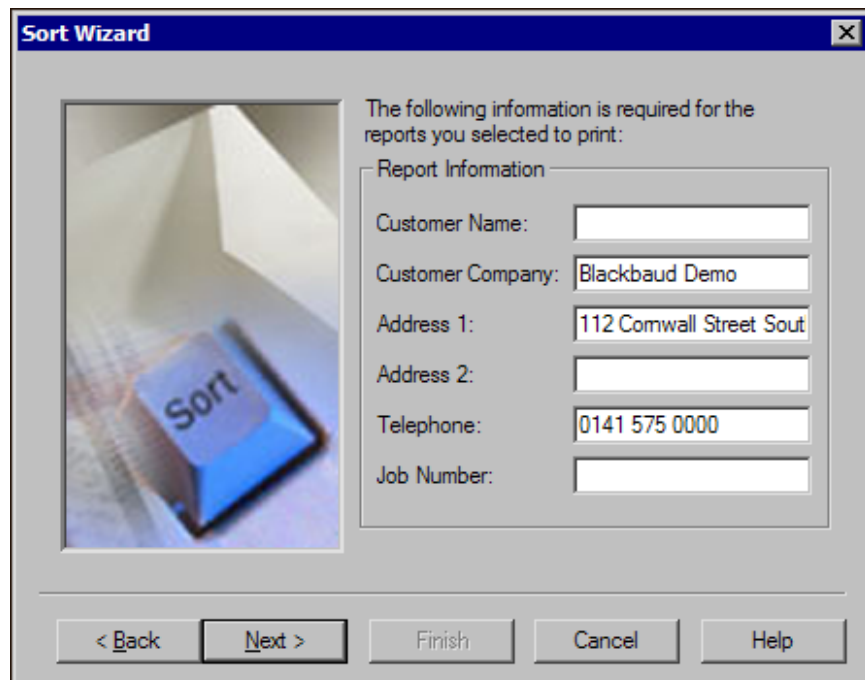
Charity Mail
 Use Charity Mail Discounts

< Back Next > Finish Cancel Help

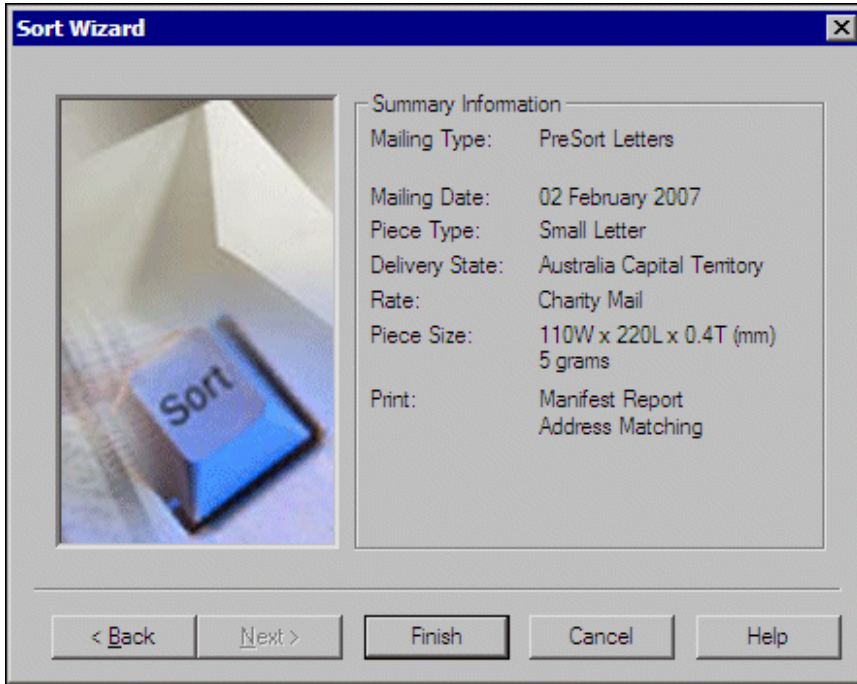
10. Click **Next**. The Sort Wizard mailing reports screen appears. Select the reports to print. Also, configure and designate the printer to print each report. For information about completing this screen, see “Sort Wizard Mailing Reports Screen” on page 25.



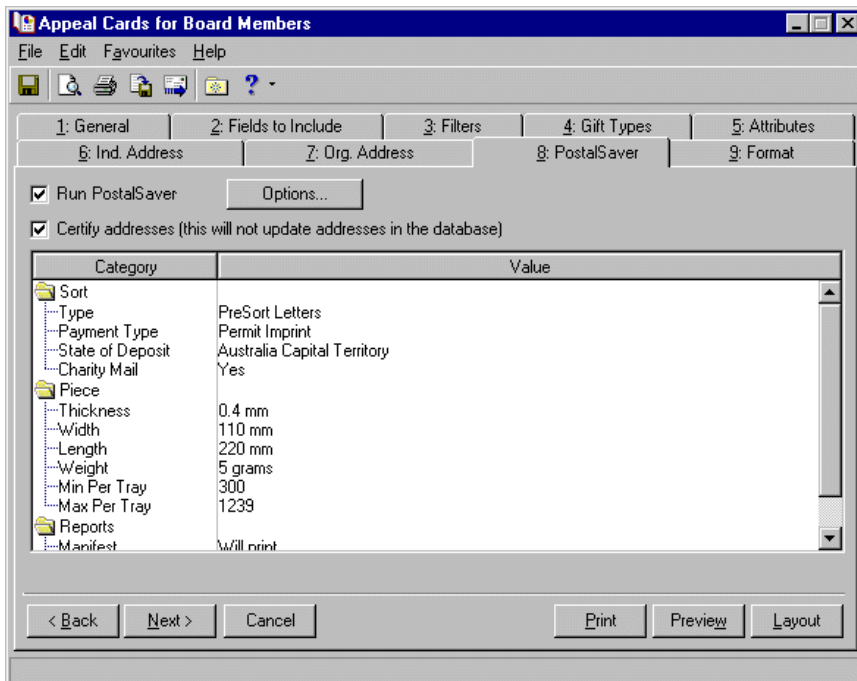
11. Click **Next**. The Sort Wizard report information screen appears. Enter the organisation's information to appear on the reports. For information about completing this screen, see “Sort Wizard Report Information Screen” on page 27.



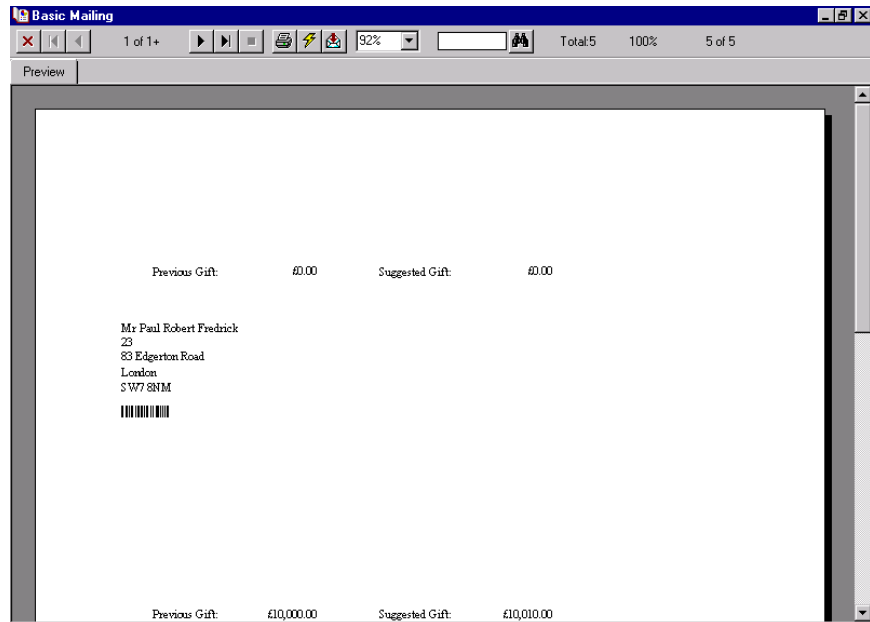
- Click **Next**. The Summary Information screen appears. The **Summary Information** frame displays a listing of the selections you made. To adjust any selections, click **Back** to return to the appropriate screen. For more information about this screen, see “Sort Wizard Summary Information Screen” on page 28.



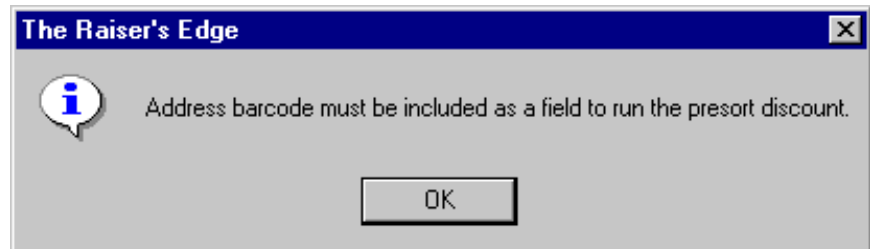
- To accept the settings, click **Finish**. You return to the PostalSaver tab. In the **Category** and **Value** columns, a tree view summary of the selections you made appears.



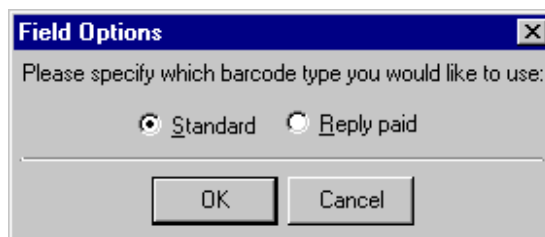
14. To preview the mail task layout, click **Layout**. The layout preview screen appears.



15. If you have not selected **Address barcode** on the Fields to Include tab, a message appears informing you that an address barcode must be included.



- Click **OK**. You return to the Fields to Include tab.
- In the **Available Fields** box, highlight **Address barcode** and click the single right arrow to move it to the **Fields to Export** box. The Field Options screen appears.



- Select the type of barcode to use. You can select **Standard** or **Reply paid**.
- Click **OK**. You return to the Fields to Include tab.
- Select the PostalSaver tab.

- To preview the mailing as it will print, click **Preview**. A message appears telling you the mailing is being prepared and the preview screen for the mail task appears.

To close the preview, click the red **X** in the top left corner of the screen. You return to the PostalSaver tab of the mail task screen.

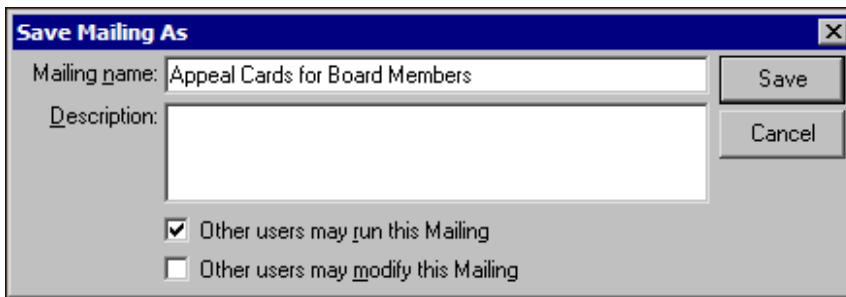
- If you do not have enough records included in your mailing, a message appears informing you of this.




To preview or print the mailing, click **Yes**. However, you cannot run *PostalSaver* or print reports that should accompany the mailing for discount purposes.


If your mailing includes enough records to meet the Australia Post minimum requirements and you receive this message, click **Options** and select **Change options** from the submenu. Run through the Sort Wizard again to verify the selected options are correct.

- To print the reports and mailing, click **Print**. A message appears telling you the mailing is being prepared, and the reports and mailing are generated.
- To save the parameter file for the mailing, from the menu bar, select **File, Save**. The Save Mailing As screen appears.



- In the **Mailing name** and **Description** fields, enter a name and description to help identify the parameter file. You can also select whether **Other users may run this Mailing** or **Other users may modify this Mailing**.
- Click **Save**. The next time you run *PostalSaver* on a mailing, you can click **Options** and select **Load options from** to select the parameter file so you can reuse the same *PostalSaver* settings.
- To close the mail task, from the menu bar, select **File, Close**. You return to the Mail page.

 Depending on how many records you have in your mailing, it may take some time to preview.


 Depending on how many records you have included in your mailing, it may take some time to print.

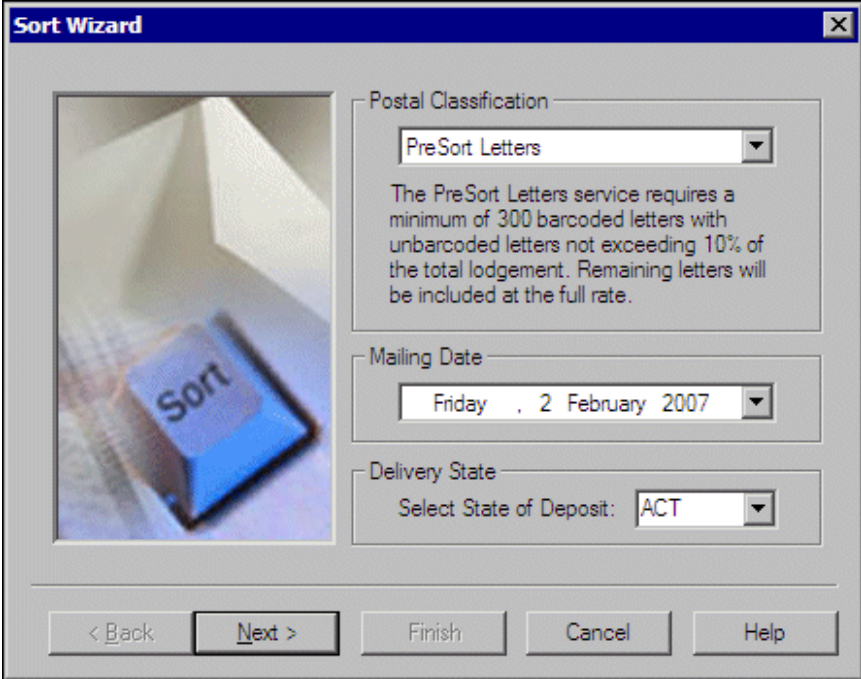
Sort Wizard Postal Classification Screen

On the postal classification screen of the Sort Wizard, you verify the classification of your mailing and enter the date you send the mailing. You also enter the state from which the mailing is deposited.

➤ Completing the Sort Wizard postal classification screen

1. In the **Postal Classifications** frame, PreSort Letters appears. In the **Mailing Date** frame, select the date you send the mailing.

 To qualify for the discounted rate of the PreSort Letters service, your mailing must include at least 300 barcoded letters. Unbarcoded letters cannot exceed 10% of the total lodgement. Any remaining letters are included at the full rate.



2. In the **Delivery State** frame, select the state from which you deposit the mailing in the **Select State of Deposit** field. For a complete list of State Abbreviations, see the *PreSort Letters Service Guide*. To order this Australia Post publication, telephone 13 13 18, or visit the Web site at www.auspost.com.au.
3. Click **Next**. The Sort Wizard piece dimensions screen appears. For information about this screen, see “Sort Wizard Piece Dimensions Screen” on page 22.


Sort Wizard Piece Dimensions Screen

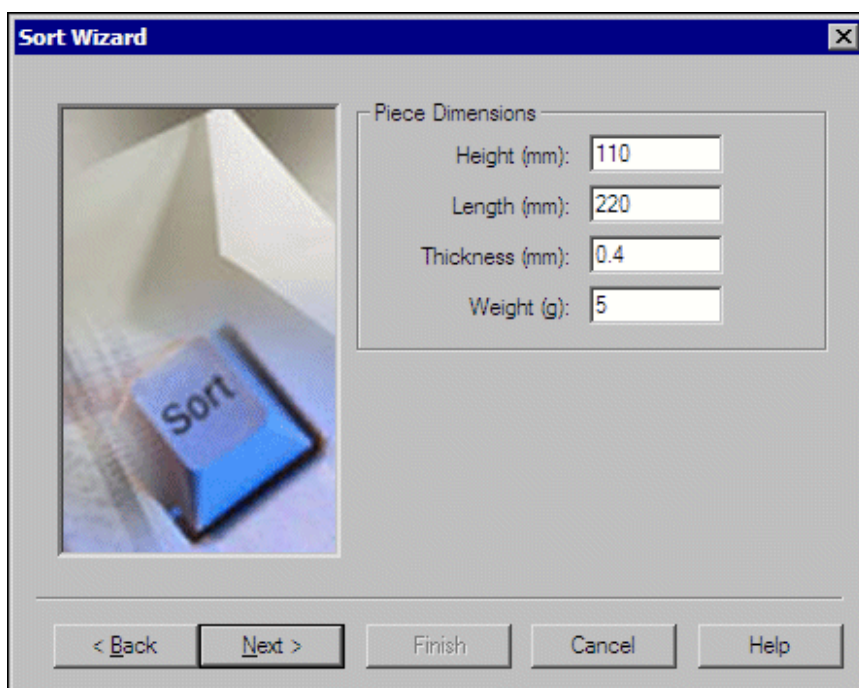
On the piece dimensions screen of the Sort Wizard, you enter the dimensions of an individual mail piece representative of the mailing.

➤ Completing the Sort Wizard piece dimensions screen


1. In the **Piece Dimensions** frame, enter the specifications of an individual mail piece representative of the mailing.

- In the **Height (mm)** field, enter the height of the mail piece, to the nearest whole number, in millimeters (mm). Facing the address side of the mail piece, the height is the dimension between the top left corner and bottom left corner of the mail piece, perpendicular to the address.
- In the **Length (mm)** field, enter the length of the mail piece, to the nearest whole number, in millimeters (mm). Facing the address side of the mail piece, the length is the dimension between the top left corner and top right corner of the mail piece, parallel with the address.
- In the **Thickness** field, enter the thickness of the mail piece, in millimeters (mm). The thickness is the dimension perpendicular to the address side of a mail piece.

 Australia Post may also refer to the “height” as the “width” of the mail piece.



2. In the **Weight** field, enter the weight, in grams (g), of an individual mail piece representative of the mailing.
3. The **Piece Dimensions** entered must conform to Australia Post regulations for the PreSort Letter categories. Make sure the **Piece Dimensions** entered conform to Australia Post regulations.

 The letter categories eligible for the PreSort Letters Service are Small Letters, Small Plus Letters, Medium Letters, and Large Letters. The Charity Mail discount pricing is applicable only for Small Letters.

PreSort Letter Category	Regulation Height Range	Regulation Length Range	Regulation Thickness Range	Regulation Weight Range
Small Letter	88 mm to 130 mm	138 mm to 240 mm	Up to 5 mm	Up to 125 g
Small Plus Letter	88 mm to 162 mm	138 mm to 240 mm	Up to 5 mm	Up to 125 g
Medium Letter	Up to 180 mm	Up to 260 mm	Up to 20 mm	Up to 250 g
Large Letter	Up to 260 mm	Up to 360 mm	Up to 20 mm	Up to 500 g

4. Click **Next**. The Sort Wizard payment type screen appears. For information about this screen, see “Sort Wizard Payment Type Screen” on page 24.

Sort Wizard Payment Type Screen

On the Sort Wizard payment type screen, you select the payment method used to pay for the postage. You also enter the minimum and maximum number of mail pieces per tray and specify whether the mailing qualifies for Charity Mail discounted rates.

➤ Completing the Sort Wizard payment type screen

1. In the **Payment Type** frame, select the **Payment Method** used to pay the postage for the mailing.
 - **Permit Imprint** – All PreSort Letters that are not metered must have a postage paid imprint. If your mailing bears a postage paid imprint in the top right corner of the envelope, postcard, address sheet, or wrapper, select Permit Imprint.
 - **Postage Meter** – When you use a postage meter, the published PreSort Letters price is printed on the top right corner of the address side of each mail piece. If a date is included in the meter impression, the date of the lodgement must appear. If your mailing bears a postage meter, select Postage Meter.

The screenshot shows the 'Sort Wizard' dialog box. The 'Payment Type' section has a 'Payment Method' dropdown menu with 'Permit Imprint' selected. The 'Pieces Per Tray' section has 'Minimum Pieces Per Tray' set to 300 and 'Maximum Pieces Per Tray' set to 1239. The 'Charity Mail' section has an unchecked checkbox for 'Use Charity Mail Discounts'. The dialog box includes a graphic of an open envelope with a blue 'Sort' label on the left and navigation buttons at the bottom: '< Back', 'Next >', 'Finish', 'Cancel', and 'Help'.

2. In the **Pieces Per Tray** frame, enter the **Minimum Pieces Per Tray** and **Maximum Pieces Per Tray** included when you sort your mailing.

3. If the **Piece Dimensions** entered on the Sort Wizard piece dimension screen conform to the Small Letters category, the **Charity Mail** frame appears. If your mailing qualifies for the Charity Mail discounted rate, tick the **Use Charity Mail Discounts** checkbox.

To receive the Charity Mail discounted rate, your organisation must be endorsed by the Australian Tax Office (ATO) as an income tax exempt charity (ITEC) and be approved by Australia Post. Application forms are available from your local post office or online at www.auspost.com.au. For more information on Charity Mail, see the *PreSort Letters Service Guide*. To order this Australia Post publication, telephone 13 13 18, or visit the Web site at www.auspost.com.au.


4. Click **Next**. The Sort Wizard mailing reports screen appears. For information about this screen, see “Sort Wizard Mailing Reports Screen” on page 25.

Sort Wizard Mailing Reports Screen

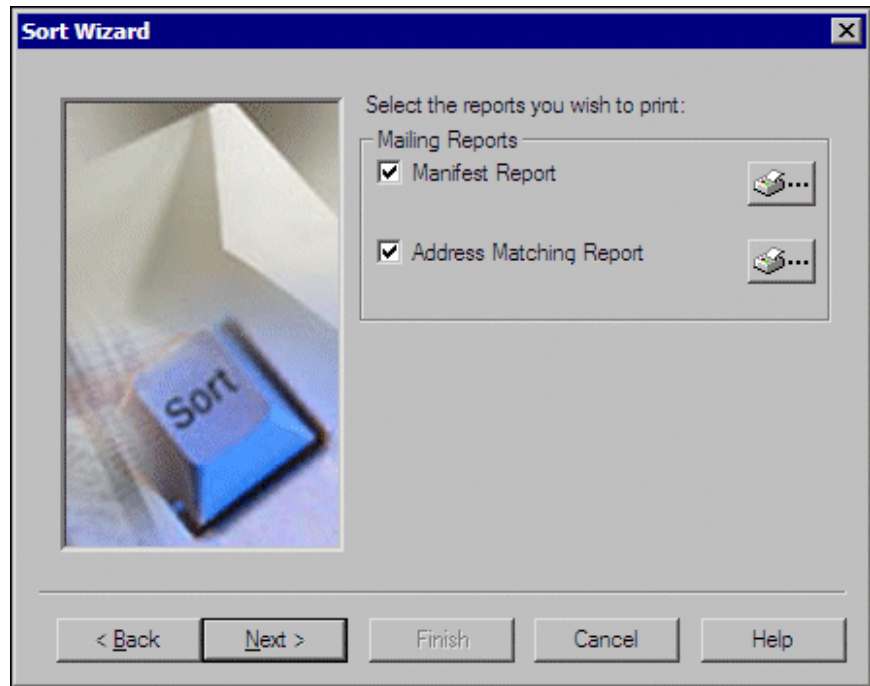
To receive discounts on your mailing, Australia Post requires certain reports. On the Sort Wizard mailing reports screen, you select the reports to print for your mailing. When you select a report, you can set up the report to print and designate its destination printer.


➤ Completing the Sort Wizard mailing report screen

1. In the **Mailing Reports** frame, select the reports to print. To select a report, tick a checkbox.
 - **Manifest Report** – The Manifest Report details the number of mail pieces and sortation of your lodgement. This report must accompany your mailing to the post office. To print a completed manifest of your mailing, tick the **Manifest Report** checkbox.

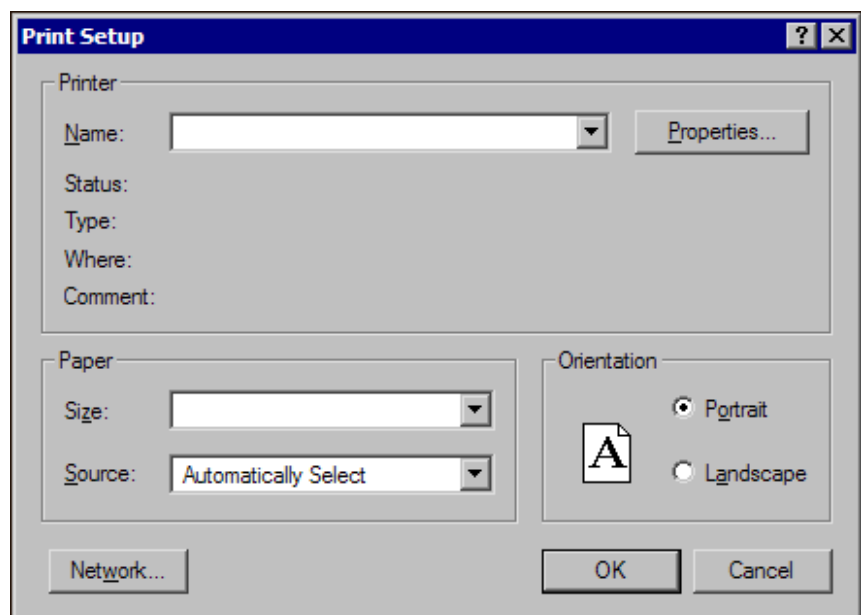
 The Charity Mail discount pricing is applicable only for Small Letters.

- **Address Matching Report** – When you use *AddressAccelerator* as your data service and, in User Options, enter a valid path to the *AddressAccelerator* data files, the **Address Matching Report** checkbox is enabled. The Address Matching Report proves you have a PreSort Letters Lodgement service agreement and the software you used to sort the mailing is AMAS-certified. To print this report, tick the **Address Matching Report** checkbox.



 If you have a network of multiple printers and select multiple reports and labels to print, you can set up multiple print jobs simultaneously.

2. When you select a report or label, the printer icon is enabled. To set up the print job and designate the printer for the report, click the icon. The Print Setup screen appears.



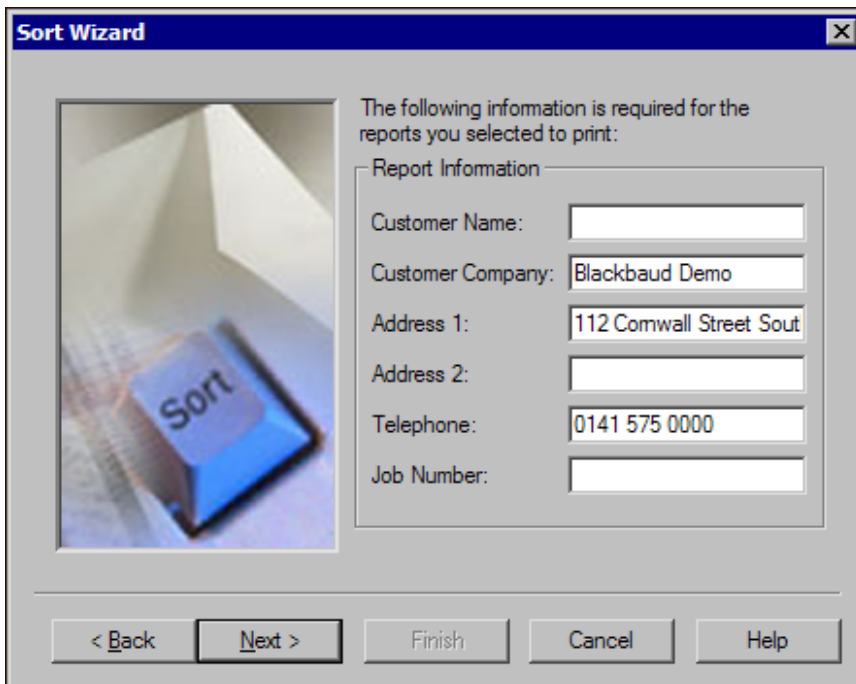
3. Configure the way the report is printed and designate a printer. When you finish, click **OK**. You return to the Sort Wizard mailing reports screen, and the selected printer name appears below the selected report.
4. Click **Next**. The Sort Wizard report information screen appears. For information about this screen, see “Sort Wizard Report Information Screen” on page 27.

Sort Wizard Report Information Screen

On the Sort Wizard report information screen, you enter information about your organisation. The information you enter here is printed on selected mailing reports. Default information on this screen comes from the General screen in *Configuration*. You can change the default information for *PostalSaver* purposes. Default information changed on this screen is not changed on the General screen in *Configuration*.

➤ Completing the Sort Wizard report information screen

1. In the **Customer Name** field, enter the name of the Lodgement agreement holder or person responsible for the mailings at your organisation or charity.



The following information is required for the reports you selected to print:

Report Information

Customer Name:	<input type="text"/>
Customer Company:	Blackbaud Demo
Address 1:	112 Cornwall Street Sout
Address 2:	<input type="text"/>
Telephone:	0141 575 0000
Job Number:	<input type="text"/>

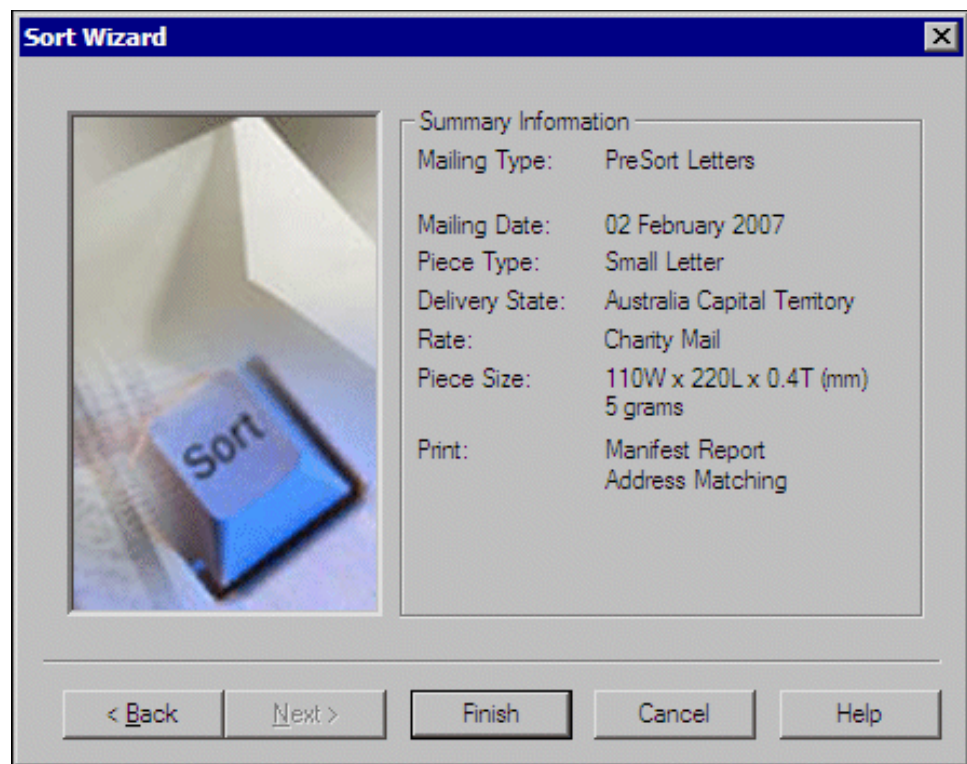
< Back Next > Finish Cancel Help

2. In the **Customer Company** field, enter the name of your organisation. This information defaults from the General screen in *Configuration*.
3. In the **Address 1** and **Address 2** fields, enter the address of your organisation. This information defaults from the General screen in *Configuration*.
4. In the **Telephone** field, enter the telephone number of your organisation. This information defaults from the General screen in *Configuration*.

5. In the **Job Number** field, enter a number for your own records to reference this mailing. The job number is also sometimes referred to as the lodgement number.
6. Click **Next**. The Sort Wizard summary information screen appears. For information about this screen, see “Sort Wizard Summary Information Screen” on page 28.

Sort Wizard Summary Information Screen

On the Sort Wizard summary information screen, a list of the *PostalSaver* options you selected for the mail task parameter file appears. The information includes the selected **Mailing Type**, **Mailing Date**, **Piece Type**, **Delivery State**, **Rate**, **Piece Size**, and mailing reports to **Print**.



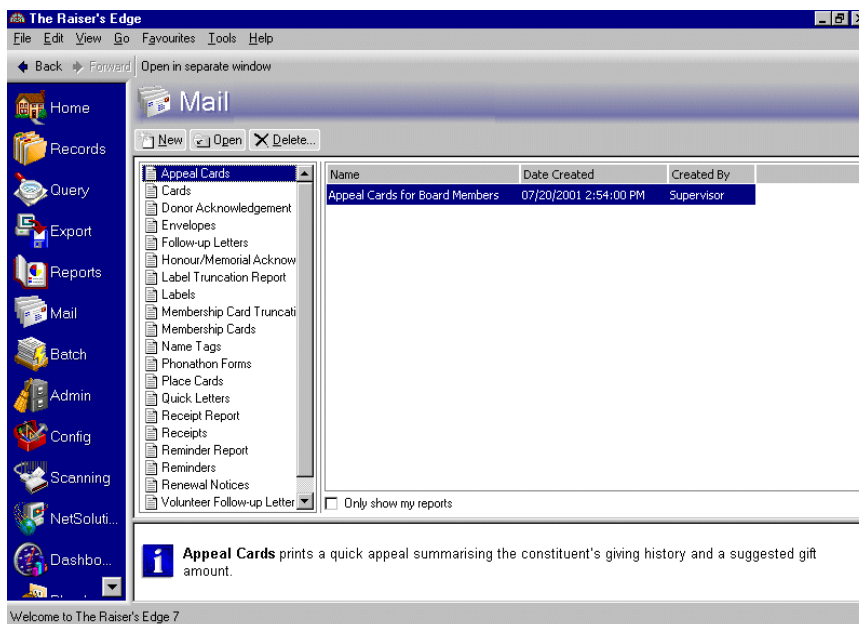
If the Sort Wizard options are incorrect, click **Back** and adjust the parameter file as necessary. After you correctly set the parameter file for the mailing, click **Finish**.

Loading PostalSaver Options from an Existing Parameter File


PostalSaver is a valuable tool that enhances *The Raiser's Edge* by automating the process of sorting mailings and completing reports. This saves you time and effort in qualifying mailings for postal discounts. With your selections on the PostalSaver tab, you create a parameter file that defines how to sort the mailing according to Australia Post regulations. After you create a parameter file, you can use it as a template for future mailings. By copying an existing parameter file, you use the existing file as a template for the new one and can easily modify your *PostalSaver* options without overwriting the previous settings.

➤ Copying the PostalSaver options from an existing parameter file

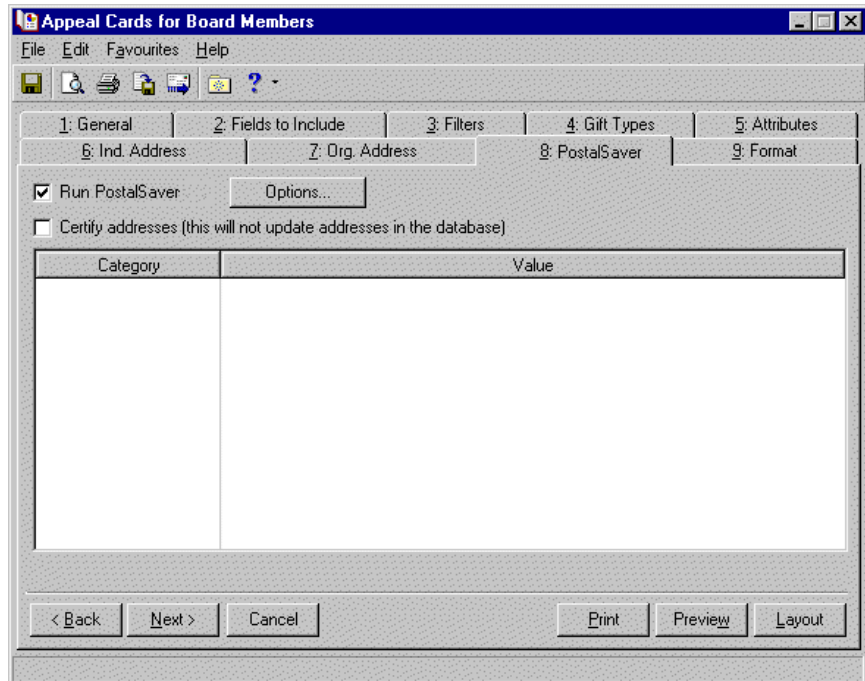
1. On the Raiser's Edge bar, click **Mail**. The Mail page appears.




2. From the list of Mail tasks on the left, select a mail task. For example, select **Appeal Cards**.
3. In the grid on the right, select an established mailing and click **Open** on the action bar or, to create a new one, click **New**. For more information about creating a mailing, see the *Mail Guide*. The mail task screen appears.

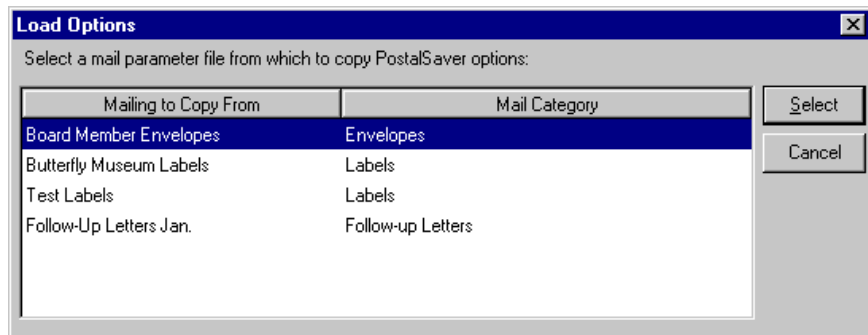
 For this procedure, Appeal Cards is used as an example mail task. Because the steps are similar, procedures for other mail tasks with the PostalSaver tab are not repeated in this section. Depending on the options you choose for other mail tasks, you may skip some of these steps and screens.

4. Select the PostalSaver tab and tick the **Run PostalSaver** checkbox.

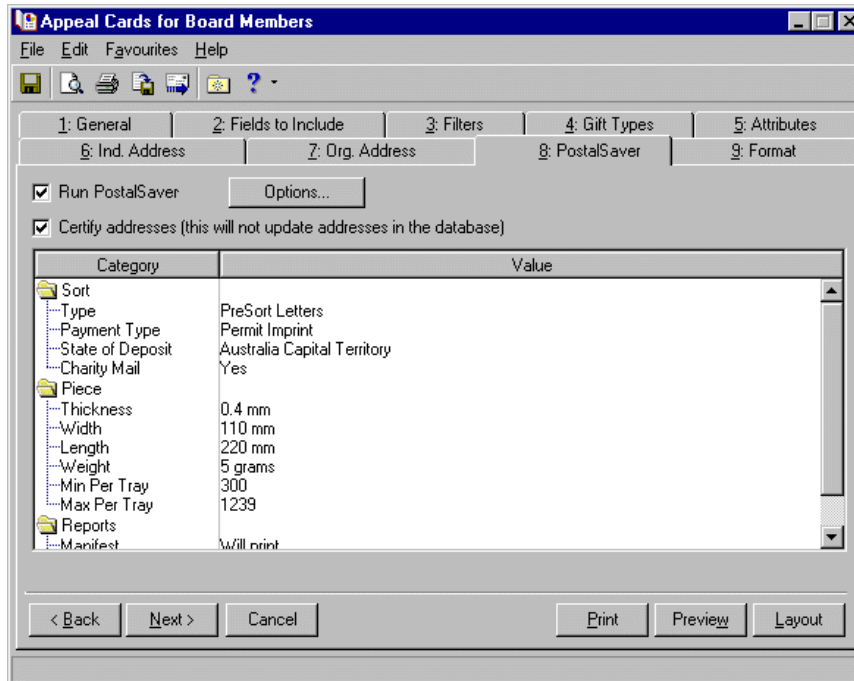


 Ticking the **Certify addresses** checkbox certifies the addresses for this particular mailing only. Address information is not corrected or certified on the constituent record. You must manually update address changes on the constituent record.

5. If you use *AddressAccelerator* as your data service and, in User Options, enter a valid path to the *AddressAccelerator* data files, the **Certify addresses** checkbox appears. To certify addresses for the mailing, tick the **Certify addresses** checkbox. For more information about this address correction service, see the *AddressAccelerator Guide for Australia*.
6. To use an existing parameter file for the mailing, click **Options** and select **Load options from**. The Load Options screen appears.




7. In the grid, the existing parameter files saved from previous mailings appear. To use an existing parameter file, select it in the grid and click **Select**. You return to the PostalSaver tab. In the **Category** and **Value** columns, a summary of the selected parameter file appears.



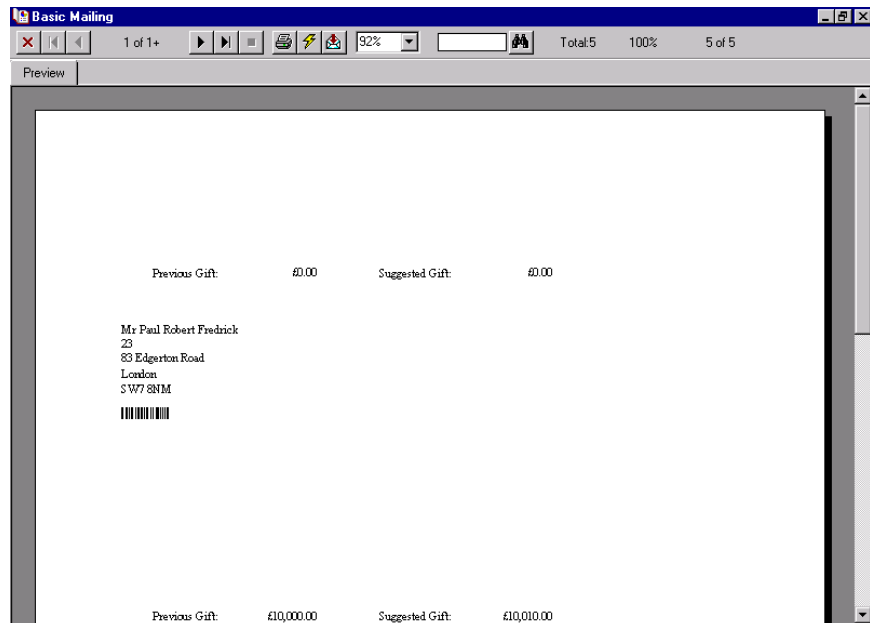
8. After you select the existing parameter file, you can change the set *PostalSaver* options as necessary for your mailing. To change the *PostalSaver* options, click **Options** and select **Change options**.

The Sort Wizard appears and displays the settings of the existing parameter file. Adjust the settings as necessary. To move through the screens of the PostalSaver wizard, click **Back** or **Next**. For information about the screens of the PostalSaver wizard, see “Running the Sort Wizard to Set PostalSaver Options” on page 13.

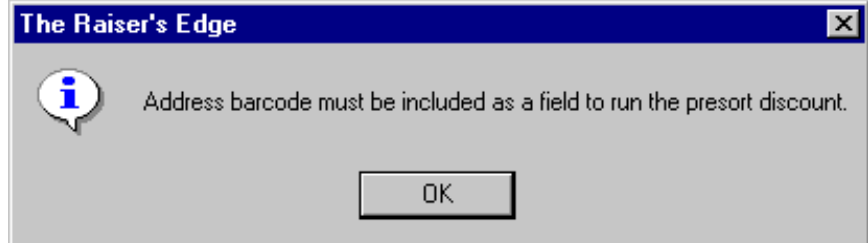
9. After you make the necessary adjustments, click **Finish** to return to the PostalSaver tab.

 For some mail tasks, such as labels, make sure to select a label size that fits the fields you select to print. Otherwise, the mailing will not print.

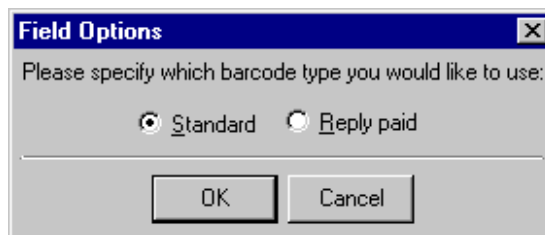
10. To preview the mail task layout, click **Layout**. The layout preview screen appears.



11. If you have not selected **Address barcode** on the Fields to Include tab, a message appears informing you that an address barcode must be included.




- a. Click **OK**. You return to the Fields to Include tab.
- b. In the **Available Fields** box, highlight **Address barcode** and click the single right arrow to move it to the **Fields to Export** box. The Field Options screen appears.



- c. Select the type of barcode to use. You can select **Standard** or **Reply paid**.
- d. Click **OK**. You return to the Fields to Include tab.
- e. Select the PostalSaver tab.

12. To preview the mailing as it will be printed, click **Preview**. A message appears telling you the mailing is being prepared and the preview screen for the mail task appears.
13. To close the preview, click the red **X** in the top left corner of the screen. You return to the PostalSaver tab of the mail task screen.
14. If you do not have enough records included in your mailing, a message appears informing you of this.


 Depending on how many records you have in your mailing, it may take some time to preview.

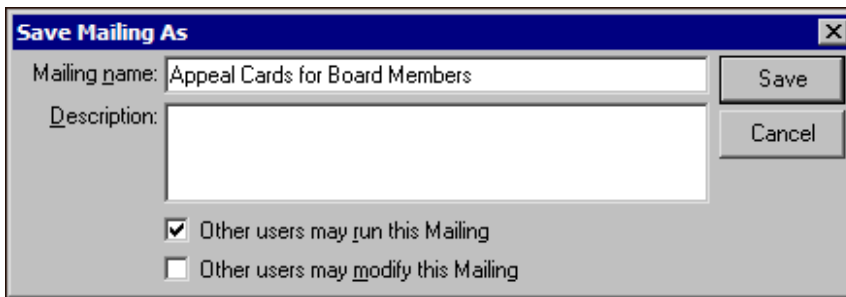


To preview or print the mailing, click **Yes**. However, you cannot run *PostalSaver* or print reports that should accompany the mailing for discount purposes.

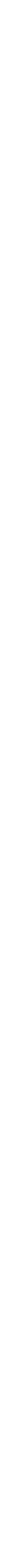
If your mailing includes enough records to meet the Australia Post minimum requirements and you receive this message, click **Options** and select **Change options** from the submenu. Run through the Sort Wizard again to verify the selected options are correct.

15. To print the reports and mailing, click **Print**. A message appears telling you the mailing is being prepared, and the reports and mailing are generated.
16. To save the parameter file for the mailing, from the menu bar, select **File, Save**. The Save Mailing As screen appears.

 Depending on how many records you have included in your mailing, it may take some time to print.



17. In the **Mailing name** and **Description** fields, enter a name and description to help identify the parameter file. You can also select whether **Other users may run this Mailing** or **Other users may modify this Mailing**.
18. Click **Save**. The next time you run PostalSaver on a mailing, you can click **Options** and select **Load options from** to select the parameter file so you can reuse the same *PostalSaver* settings.
19. To close the mail task, from the menu bar, select **File, Close**. You return to the Mail page.



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