

Excel Batch Labels- step by step guide

Instructions for creating multiple labels at once:

- 1 Navigate to **Address Letters** on the red navigation bar. Then click **Excel Batch Labels** on the blue drop down menu.
- 2 Create a **Batch Name**. This is for your reference only. Please use a name that will help you identify the group of mail you are sending.
- 3 Choose a **Group Name** (a.k.a. Mailing Profile) by clicking on the arrow and selecting from the drop down menu. The Group Name/Mailing Profile is the return address that is printed on your labels.
- 4 Make sure the visible address fields are populated with the desired Return Address. If not, you may edit them in the "Mailing Profile" section.
- 5 Choose a **USPS Delivery Services** by clicking on the arrow and selecting from the drop down menu.
 - Priority Mail – is a USPS postage upgrade to expedite the first delivery attempt to 2-3 business days. In most cases you will NOT check this.
- 6 Choose a **Container/Envelope** by clicking on the arrow and selecting from the drop down menu (If you're using your own envelope be sure to choose one with a green banner and have access to a color printer)
- 7 Choose the **Weight/Number of Pages** you will include inside your envelope. This will calculate how much First-Class Postage to apply to your labels.
- 8 Select **Label Image Type** the default is PDF; advanced options include graphic output files like JPEG, PNG, GIF, and TIFF.
- 9 If you need to **Date Advance** for your letters, choose the number of days from the drop down menu. This goes by calendar days, not business days. A zero (0) would postmark the labels today.
- 10 **Validate Address** – Select Yes or No
- 11 **Merge all Labels into One PDF** – Make sure this box is Checked if you want one PDF file containing all labels. If unchecked separate files will be generated for each address (N/A if you chose an image output; images will be individual files).
- 12 **Print Custom Field 1** – Check this box if you would like Custom Field1 printed on the bottom left corner of your PDF Labels (Not available for image output. This field will not show through the #10 window envelope)
- 13 **Firm Book** – If you would like an itemized breakout of the USPS Postage fees, address information and Certified Mail® numbers check this box.
- 14 **Address List File** – Click the **Browse** button. Select the spreadsheet you would like to upload. (Click to Download Sample Excel file for the template)
- 15 Click the blue **Submit** button.

What does it mean?

FAQs

Group Name:

Group Name and Mailing Profile are the same thing. The Group Name Dropdown should show all of your existing Mailing Profiles. This is the address that will populate in the **Return Address** block. Make sure this address populates the address of where you would like Returned letters to be delivered to.

Mailing Profile/Group Name also determines where your Delivery Confirmation emails are sent.

Note: Mailing Profiles are added/edited in the Management → Mailing Profiles area found in the red navigation bar.

Validate Address:

The system identifies inaccurate or incomplete addresses. As mailers use this process it will help to reduce the amount of undeliverable-as-addressed (UAA) letters, which in turn will result in more efficient postal mail processing and delivery operations.

16 **Map your data:** If you used our sample template your fields should match up automatically. If you need to map your data, please note that Name, Address Line 1, City, State, and Zip are all Required fields. Click "**Map Data Records**" to save your mapping and go to the next step.

17 **Does everything look good? Check each bullet point every time.**

- Are the records that were in your spreadsheet listed here?
- Does the "Total Batch Cost" reflect what it should?
- Do you have enough money in your balance to process this entire batch?

NO? Validate & Fix your Data- If any boxes are highlighted in red, adjust this information by clicking in the box and clicking the Enter/Return key to save. (You do not *have* to correct the data. Just because a field is red does not necessarily mean it will fail)

Once your data looks good (or you don't want to fix it) Click the blue **Process Batch** button.

18 **While your batch is processing** you can do other things. To download your batch and print your labels, navigate to Address Letters → Excel Batch Labels → **View Batch Labels Summary** page.

19 Next locate the most recent files processed (the newest should be at the top of the list)
Click to "Download" and **SAVE AS** the files to your local computer. (Remember where you save them)

20 Click on the ZIP files to **Unzip** the files. Next, **print the labels** from your local printer (Also print the SCAN Form if you are taking your letters to the Post Office or are giving your letters to a letter carrier).

21 **Prepare your letters:** Fold the labels and place them in the Certified Mail® Envelope 'window envelope' and place your documents behind the address sheet. Prior to sealing the envelope make sure the address sheet with all the bar codes are clear and visible looking through the envelope.

22 You may **drop your letters in any USPS Mail pick-up, give them to your USPS Letter Carrier or take them to a Post Office.**
If you want a receipt of USPS acceptance, use the provided SCAN sheet(s). USPS will scan this master bar code and return it to you as your receipt of acceptance into the USPS mail stream.

Process Batch = Spending (\$) Money

It is important to understand that by clicking the "Process Batch" button, you are locked in to spending the "**Total Batch Cost**" with USPS.

These labels are being generated with **LIVE USPS PC Postage.**

Also, once a batch has started processing, there is no way to stop it.

Preparing your letters:

We recommend you use one of our USPS-approved Certified Mail® envelopes

Available in:
#10
6" x 9"
9" x 12"



However, If you're using your own envelope: The **green** banner must be visible on the **top** of the **front and back** of the envelope. Print the label on plain paper in color. Use tape or glue stick to affix the label page to the envelope and follow the suggested fold lines. (If you're using tape, do not put tape over the bar codes- this may cause USPS scanning issues)

If you need help or assistance please call 800.406.1792