connectsuite
e-certify

How to create a batch of mail pieces
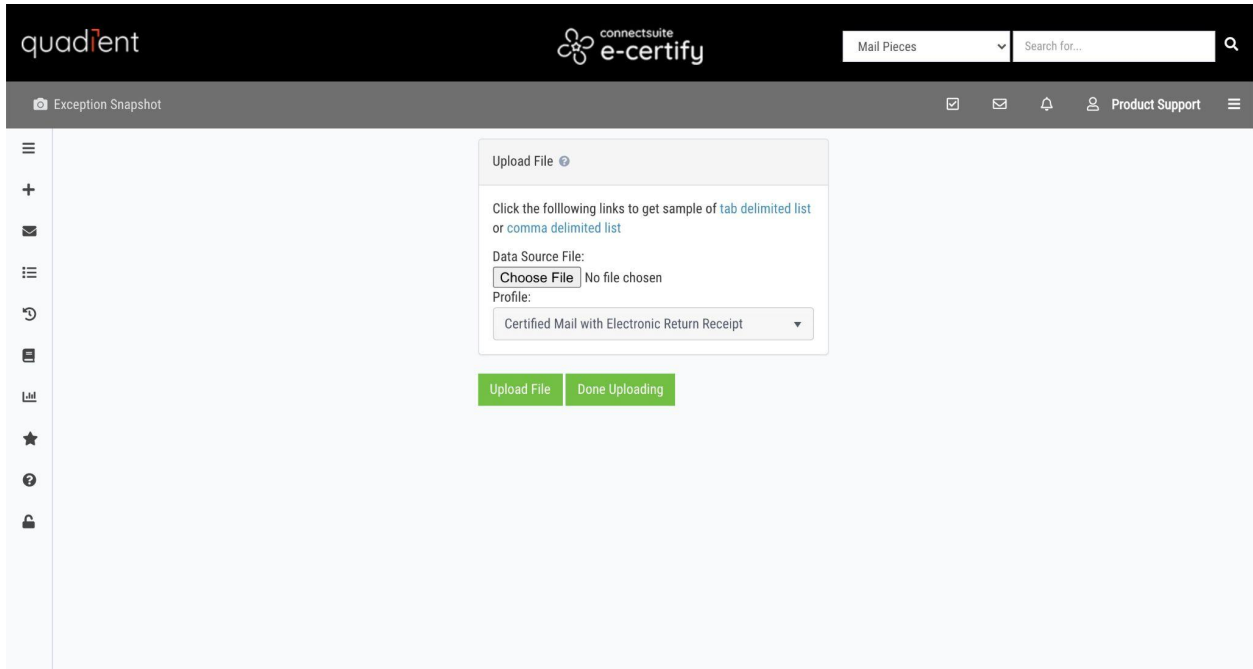
Step 1: Prepare your file

Download sample file

To avoid having to create your file from scratch, we recommend using our sample file that already contains all the appropriate headers. To download the sample file, navigate to the Mail Queue, then click **Upload File**.

Click either of the links (**tab delimited list** or **comma delimited list**) to download a sample file.

Enter your data

Open the sample file in your application of choice (Microsoft Excel, Google Sheets, etc.) and add your own data.

	A	B	C	D	E	F	G	H	I	J	K	L
1	addr1	addr2	addr3	addr4	addr5	addr6	addr7	addr8	weight	postage	custom1	custom
2	Ashley Kennedy	808 Lake Ct	West Covina	CT	52232				1			
3	Debra Baker	1246 Spring Blvd	Cary	WA	60098				1			
4	Ryan Smith	848 Mill Way	Springfield	CO	50901				1			
5												
6												
7												
8												
9												

Use as many of the **address** columns as needed. Choose either the **weight** column or the **postage** column to enter a value for estimating postage. If the **weight** column is used, enter the weight of the piece in ounces. If the **postage** column is used, enter the amount of postage required for the piece excluding extra services. The **custom field**, **retrefnum**, and **notificationemail** columns are optional.
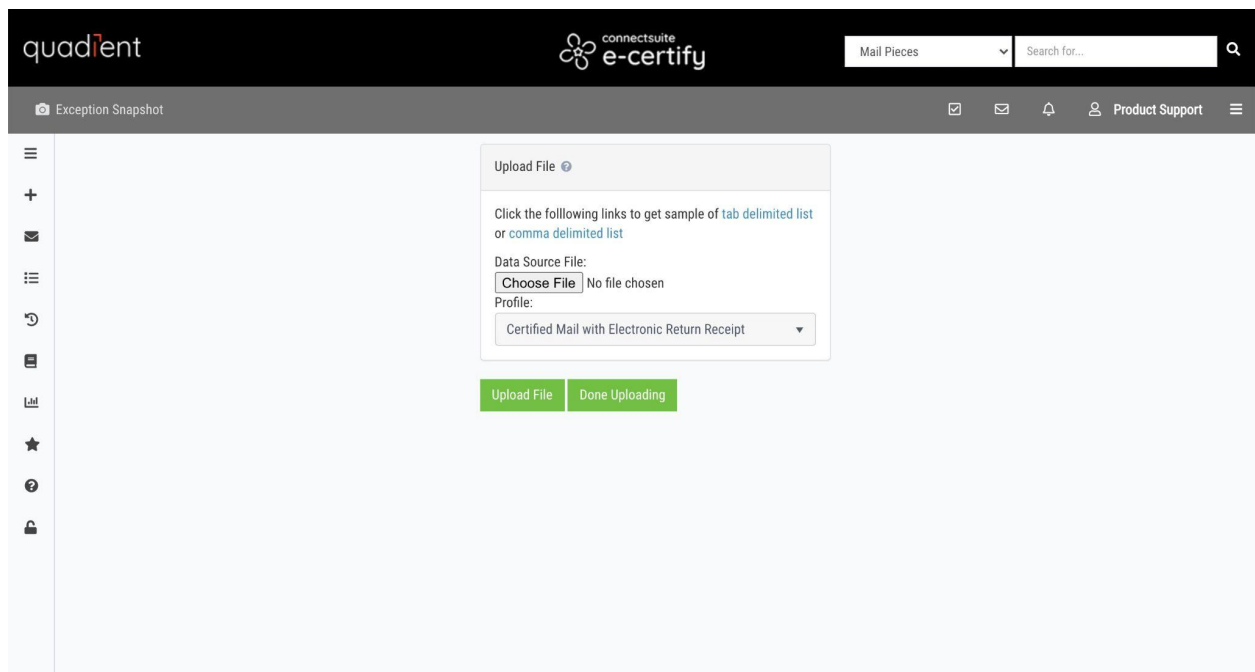
Use the **notificationemail** column if you would like to specify an email address for email notifications. To send email notifications to multiple email addresses, separate them with a semicolon. If this column is left blank, notifications will be sent to the notification email of the user who uploaded the file.

Save your file

When you're finished entering data, save your file as either a CSV or TSV file to be uploaded to e-Certify.

Step 2: Upload your file

Click **Choose File** and select the CSV or TSV file you just created. Next, select a mailing profile to be used for all mail pieces in the batch. Finally, click **Upload File** to create the mail pieces.

If the mail pieces were successfully created and there weren't any problems with your file, you will see the **File successfully imported!** message. You can also review the Upload Report in the bottom left of the page to ensure all of your pieces were successfully created.
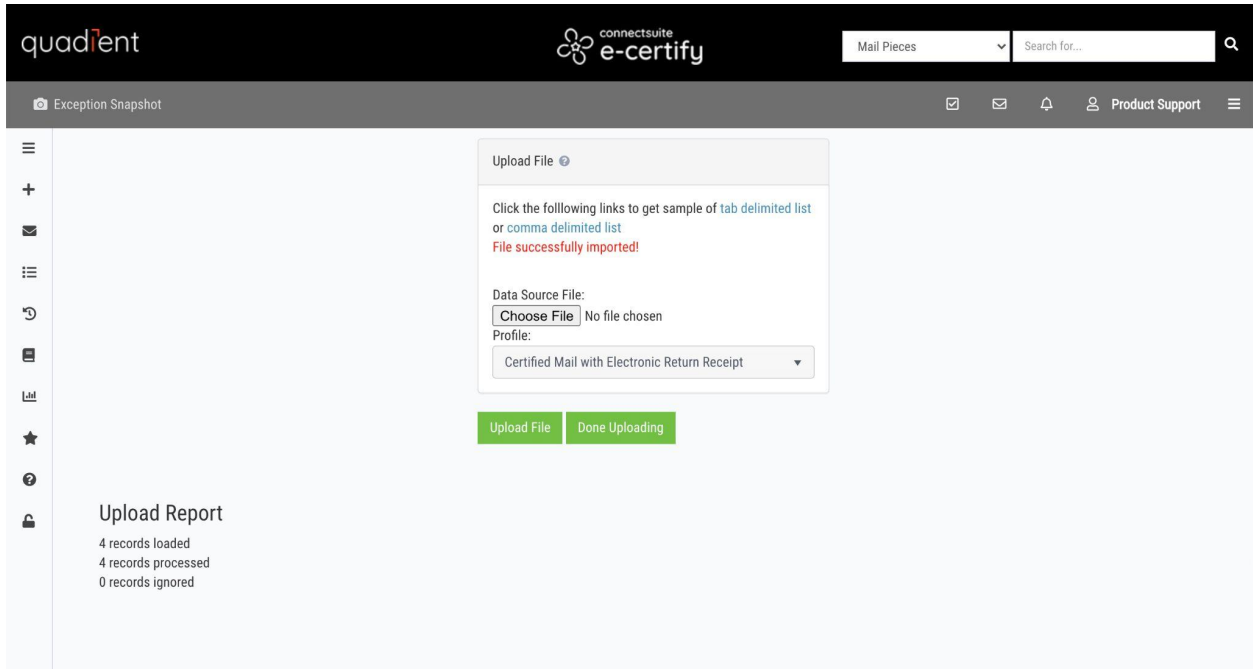
When you're finished, you can click **Done Uploading** to be taken to your Mail Queue.

Step 3: Print the banner pages

After mail pieces are created by uploading a file, they are placed in your Mail Queue. Here, you have the option to edit each piece individually by clicking the pencil icon.

To download the banner pages for all of your mail pieces in one PDF, select the checkbox next to each piece and click **Download Banner Pages**. Alternatively, you can open and print each banner page individually by clicking the paper icon to the right of each piece. Fold and insert the banner pages into your window envelopes.

Step 4: Submit your mail pieces to the USPS

Before actually entering your mail pieces into the mail stream, it is crucial to first submit them to the USPS. To do this, select the checkbox next to each piece, then click **Submit Pieces to the USPS**. This does three important things:

- It lets the USPS know the mail pieces are coming.
- It generates the USPS paperwork for the mail pieces, including the Firm Mailing Book for Accountable Mail (PS Form 3877) and SCAN Form (PS Form 5630).
- It allows tracking and electronic return receipt data to be returned and retrievable in e-Certify.

Upon submitting your pieces to the USPS, you will be taken to a confirmation page where you can download the completed PS Form 3877 or PS Form 5630.

Your mail pieces are now ready to be entered into the mail stream.