



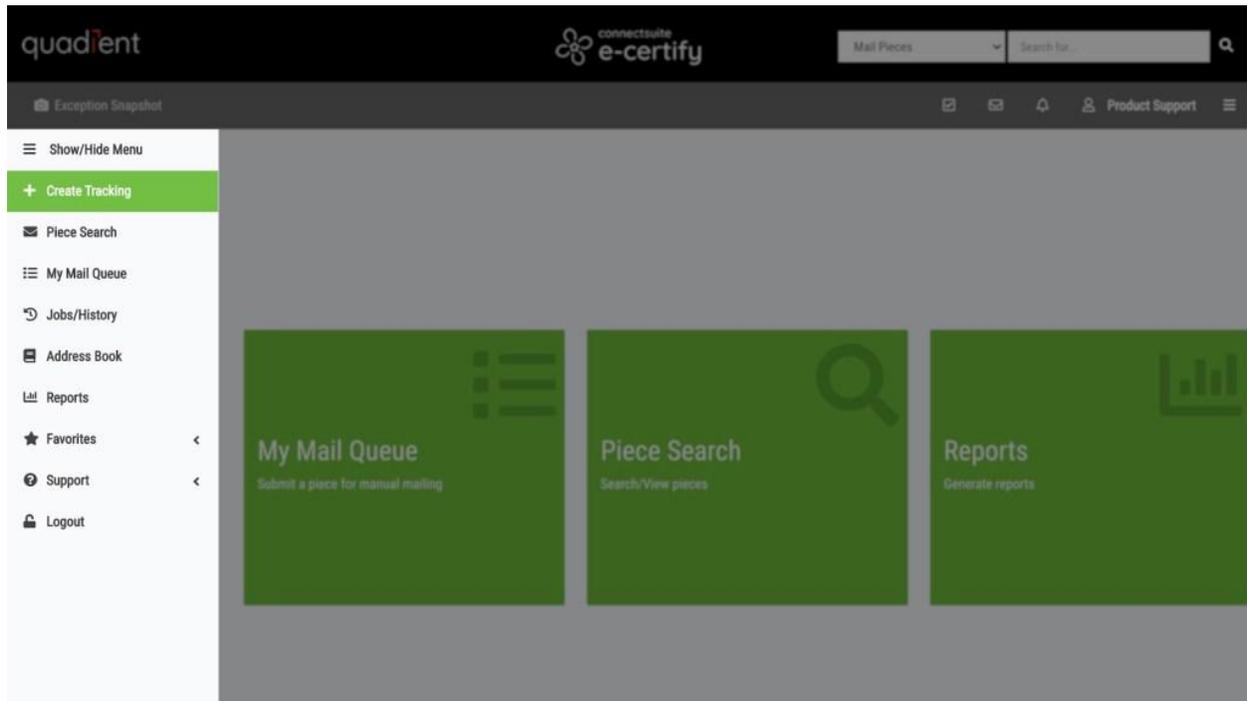
How to create a mail piece

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Step 1: Create a mail piece

Navigate to Create Tracking

To create a mail piece, open the left navigation bar and select **Create Tracking**.



Select A Profile

Select a mailing profile to use for the mail piece. This will auto-populate a number of fields on this page and speed up your workflow.

Select A Profile ?

Certified Mail with Electronic Return Receipt ▼

Add Recipient Address

Enter an address into the **Name/Address Block**.

Add Recipient Address ?

Address Book Lookup

Name/Address Block: (8 lines Max)

Validate Address

Add To My Address Book

You can click **Validate Address** to ensure USPS compliant formatting based on USPS standards. If you manually entered an address, you can select **Add to My Address Book** to save the address to your address book.

Calculate Postage

Estimate the postage required for your piece. Note that this is only an estimate and doesn't need to be exact.

Calculate Postage ?

Envelope Type: Letter ▼

Calculation Method: Page Count ▼

Pages: --- Select --- ▼

The **Envelope Type** field will be auto-populated according to your mailing profile selection, but can be edited.

Select a method for calculating postage, and then enter the appropriate page count, weight, or postage.

Custom Fields

Here, you have the option to add custom fields. These are variable fields associated with the mail piece that help with mail piece search and identification. Depending on your settings for custom fields in various places, these fields may be auto-populated.

Custom Fields (click to expand) ?

| | |
|---------------------------------------------|----------------------------------|
| Return Reference #: <input type="text"/> | Custom 1 <input type="text"/> |
| Custom 2 <input type="text"/> | Custom 3 <input type="text"/> |
| Custom 4 <input type="text"/> | Custom 5 <input type="text"/> |
| Custom 6 <input type="text"/> | Custom 7 <input type="text"/> |
| Custom 8 <input type="text"/> | Custom 9 <input type="text"/> |
| Custom 10 <input type="text"/> | |

Additional Settings

All of these fields will be auto-populated according to your mailing profile selection. Depending on the configuration of the selected mailing profile, some fields may or may not be editable.

Additional Settings (click to expand) ?

Tracking Label: #10 (double window default) ▼

Locations: All Locations ▼

Departments: All Departments ▼

Email Notifications ?

productsupport@connect-suite.com ▼

Proof of Acceptance Email Proof of Delivery Email

Extra Services ?

Certified Mail

Restricted Delivery

Electronic Return Receipt

Certificate of Mailing

The **Tracking Label**, **Departments**, and **Locations** fields will all be auto-populated according to your mailing profile selection and will always be editable.

Email Notifications: Configure email notifications for the piece. Depending on the configuration of the selected mailing profile, these fields may or may not be editable. Select **Proof of Acceptance Email** to receive an email with the POA attached when the USPS accepts the mail piece. Select **Proof of Delivery Email** to receive an email with the POD attached after the mail piece is delivered and signed for.

Extra Services: Select the extra services you would like with the mail piece. Depending on the configuration of the selected mailing profile, these fields may or may not be editable.

Save your mail piece

When you're done, click **Save**. Or, if you want to create another piece with all of the exact same selections and settings but a new recipient address, click **Save and Create Similar**.

Step 2: Print the banner page

After mail pieces are created and saved, they are placed in your Mail Queue.

The screenshot shows the 'My Mail Queue' interface in the e-certify system. At the top, there's a search bar and a 'Go' button. Below that, there are buttons for '+ Create Tracking Number', 'Upload File', 'Send to Mailroom', 'Download Banner Pages', and 'Submit Pieces to the USPS'. A 'View Filter' dropdown is set to 'All'. The main content area is titled 'Overview' and contains a table with one mail piece. The table has columns for Recipient, Tracking Number, Custom Fields, Mailing Profile, and Created Date. The mail piece details are: Recipient: DEBRA BAKER, 1246 SPRING BLVD, CARY WA 60098; Tracking Number: 9214 8901 9403, 8348 7509 04; Class: First Class; Services: CM, ERR; Mailing Profile: Certified Mail with Electronic Return Receipt; Created Date: 9/8/2021 10:21:49 AM. There are icons for deleting, editing, and printing the banner page. At the bottom, there are buttons for 'Delete Selected', '+ Create Tracking Number', 'Send to Mailroom', 'Download Banner Pages', and 'Submit Pieces to the USPS'.

Open and print the banner page for your mail piece by clicking the paper icon to the right of it. Or, select the checkbox next to the piece and click **Download Banner Pages**. Fold and insert the banner page into your window envelope.

Step 3: Submit your mail piece to the USPS

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

- It lets the USPS know the mail piece is coming.
- It generates the USPS paperwork for the mail piece, 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 piece to the USPS, you will be taken to a confirmation page where you can download the completed PS Form 3877 or PS Form 5630.

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Submitted Mailing Jobs Confirmation

The mailing jobs listed below have been submitted to the USPS. Click on the buttons below for mailing reports.

| ID | EFN | Piece Count | Entry Zip | User | Status | Created | Actions |
|---------|----------------------------|-------------|-----------|---------------------------------|--------|---------------------|---------|
| 2922132 | 92750901193562000031500592 | 1 | 56001 | productsupport@connectsuite.com | Ready | 09-08-2021 13:13:46 | |

Done

Your mail piece is now ready to be entered into the mail stream.