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A Step-by-Step Guide to Creating Batch Labels

Part 1: Have your Excel spreadsheet ready.

To create a batch of labels you will need to have a list of delivery addresses in an Excel spreadsheet. A template is available on our website, at the top of the Create Batch Labels page.

Upon opening the spreadsheet, notice the highlighted columns. These are required fields. The delivery addresses must be filled into these columns to create batch labels. The text count limit is included for each column.

Delete the sample data and use this spreadsheet to enter your delivery addresses. Keep the header row (To Company Name, To Name, To Address, Etc.) to guide you through filling in your information correctly.

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Part 2: Fill out the Excel spreadsheet.

To properly fill out the Excel spreadsheet, follow these guidelines.

To Company Name	First line of Address block – not required (Limit 46 characters)
To Name	Second line of Address block (first if no company name is used – REQUIRED (Limit 46 characters)
To Address Line 1	Primary Delivery Address - REQUIRED
To Address Line 2	Secondary Delivery Address (Unit/Suite/Floor/Apt) - not required
To City	Delivery City – REQUIRED (no special characters – i.e. commas or dashes)
To State	Delivery State – REQUIRED (State abbreviation; Limit 2 characters)
To ZIP	Delivery ZIP – REQUIRED (Note: be sure you didn't drop any preceding zeros; zip codes MUST be 5 digits – format cells as text)
To ZIP 4	+4 Zip - not required. If populated, make sure it is 4 digits
To Phone	To Phone: Not required – If populated, make sure numbers are formatted without hyphens
Custom Field 1	Not required. Use this field for all search criteria that you would like to use to pull up tracking info post mailing. Note: This is also the only field that can be printed on your PDF address insert. (Limit 256 characters, only first 50 print on label)
Custom Field 2	Not required (Limit 50 characters)
Custom Field 3	Not required (Limit 50 characters)
Custome Field 4	Not required (Limit 50 characters)
Custome Field 5	Not required (Limit 50 characters) – Optional FILE RENAME function – Note: If you chose Individual PDF output (Uncheck the "Merge all labels into One PDF") Option: When generating your batch, your files WILL BE renamed to whatever data is populated in this Custom Field 5.

IMPORTANT:
- Failure to follow these data file specs may result in incorrect label generation OR error messages, resulting in re-runs.
- Be sure to use only supported characters in all fields. See the next page for a list of supported and unsupported characters.
- Once you begin to Process a Batch you are locked into spending the "Total Batch Cost" with USPS.
- Labels are generated with LIVE PC Postage.
- Once a batch has started processing, there is no way to stop. So, it is important to ensure your spreadsheet is correct prior to uploading it for processing.

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Supported & Unsupported Characters

SUPPORTED CHARACTER: Allowed characters to be used in Certified Mail Labels.

- Letters Numbers
- Period
- Comma
- Space
- Dash or Hyphen Ampersand Slash

UNSUPPORTED CHARACTER (Do Not Use): Characters that are NOT supported due to bar code read issues.

- * Asterisks
- ( ) Parentheses
- " " Quotation marks
- : Colons
- ; Semicolons
- ' Apostrophes
- @ At sign

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Instructions for creating multiple labels at once:

1. Navigate and hover over Address Letters on the red navigation bar. Then click Excel Batch Label Processing 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 Service 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, but advanced options include graphic output files like JPEG, PNG, GIF, and TIFF.
9. If you need to Date Advance 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 Field 1 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 Download Sample Excel File for the template)
15. Click the blue Submit button.
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.

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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 > Completed Excel Batch Labels > View Batch Labels Summary page.

19. Next locate the most recent files processed (the newest will be at the top of the list), click "Download" and SAVE AS the files to your local computer. Be sure to remember where you save them.

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

21. Prepare your letters. Fold the labels and place them in the Certified Mail® Envelope(window envelope) Then, place your documents behind the address sheet. Prior to sealing the envelope, make sure the address sheet with all the bar codes is clear and visible looking through the envelope window.

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.

If you need help or assistance, please contact us at 800.406.1792

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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. Group Name/Mailing Profile also determines where your Delivery Confirmation emails are sent. Note: Mailing Profiles can be added/edited by going to the Management > Mailing Profiles page 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.
Process Batch = Spending ($) Money	It is important to understand that by clicking the "Process Batch" button, you are locked into 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. To do this, print the label on plain paper in color. Use tape or a 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)