ELECTRONIC SERVICE REQUEST

TUTORIAL

for

City of Portland Employees

Printing & Distribution Services Division
OMF Bureau of Technology Services
Customer Service Phone: 503-823-4448
pnd.customerservice@portlandoregon.gov
Interoffice: 124/P&D
124 SW Madison Street, Portland, Oregon 97204

CONTENTS

COMMON ISSUES WITH ORDERS

Document Format
- To make sure that your font, margins, and spacing convert properly <u>always</u> upload/send P&D a PDF version of your document with embedded fonts.
  - Make sure to review the document after you have saved it as a PDF, as sometimes things get glitchy when converting.

City Seal
- <u>All</u> City of Portland documents <u>must</u> contain a clear COP seal.
  - Logos: [City Seal and Flag Graphics](#)
  - Policy: [ADM-12.01 - Official City Seal](#)

Bleed vs White Margin
- When submitting an order that needs bleed (printing to the edge of the paper), please, make sure to:
  - Provide a PDF with <u>crop marks</u> for where the cuts should be, and <u>at least .125"</u> <u>bleed</u> (overhang of the printing past the crop marks). [Click here for more info.](#) This can be avoided by:
    - Having no valuable text/printing at least .25" from the edge with a comment indicating "trim for bleed effect".
    - Or indicating that it is okay to have a white margin. (Least expensive option)

Mailers
- Address lists:
  - Send P&D an <u>Excel</u> file that ONLY contains the merge fields needed.
  - If mailing to generic addressees, let P&D know how is should be addressed:
    - Commonly: "To our neighbors at:" or "To current resident:"
  - If mailing to specific addressees (proper names), an endorsement is required. If your endorsement choice is not listed, we use "Return Service Requested".
    - Return Service Requested: Undeliverable mail is returned to sender.
    - Forwarding Service Requested: Undeliverable mail is forwarded to the recipient. (If a forwarding address is not on file, it gets returned.)
  - Eliminating the need for an endorsement.
    - Add "Or Current Occupant" to the address block.
    - Doing an NCOA (Not Change of Address) scrub for an additional fee.
- Make sure documents have the necessary blank/clear space on the addressing/mailing side for the addressing and USPS barcode.
  - Postcards: Blank space 3.5" from the right edge and .625" from the bottom edge.
  - Letters for inserting:
    - Option 1: Leave a gap between 2.25" to 3.5" from the top of the page.
    - Option 2: Leave the bottom 2" blank on the back of the last page.
    - Option 3: Adding a cardstock insert with the addresses on them.
  - Self-Mailers: www.portland.gov/omf/bts/pd/print-mail-guidelines/self-mailers
  - Provide the correct P-Code for your bureau/department's postage billing.
- For more information, review [Mailing Information](#), or see our website: www.portland.gov/omf/bts/pd/print-mail-guidelines

CREATING A SERVICE REQUEST

Important Links

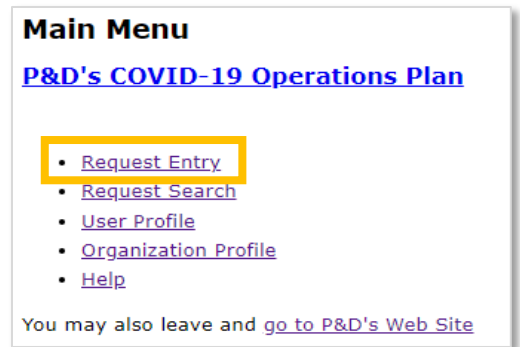- P&D Main Page: https://www.portland.gov/omf/bts/pd/order-printing-services
  - City Employees select: City Employees- Enter the application
    - Submit an eSR using: Request Entry
    - Looking up old orders: Request Search
    - Setting up your profile: User Profile
    - Helpful Information: Help

Avoiding Common Glitches

- Browser: Microsoft Edge works best because the program is based in Microsoft Access.
- Cost Center: Making sure that the cost center is entered correctly will make things easier! (Common error for PP&R: use O:9PKPR00##### vs PKPR00#####)

Screen 1: Main Menu

- Click Request Entry to start your request.
- The system will save it as a draft in Request Search until the job is submitted.
- Draft alerts are sent out to remind users of their unsubmitted service requests.

Main Menu

P&D's COVID-19 Operations Plan

- Request Entry
- Request Search
- User Profile
- Organization Profile
- Help

You may also leave and go to P&D's Web Site

Screen 2: General Information

- Title
  - Include a detailed description to make searching for and differentiating jobs easy.
  - Consider adding a date or name if the job is frequently processed.
- Due Date
  - Please, select the actual date when you need the job delivered.
    - When selecting a due date, consider how complex the order is, and when we normally stop at your location.
  - We can usually complete small jobs submitted by 2:30pm by the next business day.
- Priority Processing
  - Click this box for RUSH jobs.
  - Note that priority processing adds 30% to the cost of the job.
- Ship/Hold
  - Select Ship or Hold for Pick-Up.
- Verify that the "Created By" information is correct.
  - If not, please, update your User Profile with the correct information.

General Information		?
Request Title	Detailed description of your job	
Form Number		(optional)
Due Date	11/10/2022	⌄
Priority Processing	☐	
Ship/Hold	⦿Ship ◯Hold	

Created By		?
Name	Lisa Kato-Fieldhouse	
Organization	Printing & Distribution	
Phone	503-823-4448	
Fax		

Next >>   Cancel

Screen 3: Ship To

- P&D drivers will NOT see delivery information input in any other area of the eSR.
- For accurate delivery, input the inter-office code/Suite #/Building name is optional
  - Example 350/MDCC or 106/#858
  - Please, note that Outlook is not a reliable source for inter-office codes.
- Input the accurate name and number of the recipient.
- Indicate any special delivery information.
  - Examples: Flexible delivery date, must have by date, extra copies to: 350/MDCC.
  - Note that we do not deliver to home addresses.

Screen 3: Billing Information

- Entering the cost center correctly will help avoid frustrating system errors.
- If you have the option with the discs, click the appropriate disc to the left of the identifier for your cost object them input the information into the boxes to the right.
  - If not, enter the Cost Object using the correct code at the beginning (C: O: W:)
  - Common Cost Object error for PP&R:
    - Correct: O:9PKPR00##### (Incorrect: PKPR00#####)

Printing and Copying Service Request - Detailed description of your job #1245140

Ship To		?
Name	Lisa Kato-Fieldhouse	
Address	Please use the inter-office mail address format (not street addresses) for City addresses:	
	Building Number/Suite Number Example: 106/450	
	Name Joe Smith	
	124/P&D	
	Delivery date flexible?	
	No later than ? ____	
Phone	503-823-4448	
Billing Information		?

Cost Object   Choose one of the following:
- ○ **Cost Center**   C: ____
- ○ **Internal Order**   O: ____
- ○ **WBS Element**   W: ____

[Next >>] [<< Back] [Finish] [Close] [Delete]

Navigation Buttons

Do NOT use the browsers back or forward buttons.

- Next: Advance to the next screen.
- Back: Return to the previous screen.
- Finish: Jump to the final screen where you can review and submit the order
- Close: Closes out the current process.
- Delete: Cancel this order
  - Submitted orders can NOT be altered by customers. To cancel or alter a submitted order, email P&D ASAP to see if the job can be pulled from production.

Screen 4: Originals

- Originals
  - Print-Ready:
    - Click the Print-Ready box if the PDFs attached are ready to print without any adjustments to the artwork.
  - Preparation Required:
    - Fill out any details regarding how this job should be prepared.
  - Proof Required:
    - Click this box if you want a digital or printed proof. (Additional charge)
- Original Listings
  - Click "Add" to upload your documents and spreadsheets.
    If ordering business cards, please, use the fillable PDF template for your bureau.
    - Click "Choose File" to upload your document
      - Indicate MAC or PC, and select Source Format (PDF, Excel?)
    - Include any notes needed. (For example, inputting details for similar jobs being attached but needing different paper colors or copies.)
    - Click OK to upload. (Edits can be made using the Edit and Delete buttons)
    - Repeat this process for uploading multiple documents.
  - If your job has complex printing or delivery instructions add a spreadsheet with clear instructions. (Click here to see an example)
  - If you are having trouble uploading the documents:
    - Email them to P&D, referencing the service request number in the subject line.
    - Oversized documents can be uploaded to \\Cgisfile\public\P&D
      - Save your files in a folder named with your service request.

Originals		?
Print-Ready	☑	
Preparation Required (Fill out only if not print-ready.)	Fill out only if not print-ready. Include details of what you need.	
Proof Required	☐	
Originals Listing		?
Add Original: Delivery Medium Electronic: Attached ▼ Add		

	Delivery Medium	File Name		Comments
Edit Delete	Electronic: Attached	Sample Delivery Spreadsheet for PnD.xlsx	📎	ONLY include the merge fields needed for your document on spreadsheets.
Edit Delete	Electronic: Attached	P&D Paper Samples.pdf	📎	Upload a PDF version to make sure your font, spacing and margins convert properly.

Examples

Original Description		?
Delivery Medium	Electronic: Attached	
File Name	Choose File Sample Deli... for PnD.xlsx	
Platform	◉ PC ○ MAC	
Source Format	Excel ▼	*If "Other", describe in comments*
Comments	ONLY include the merge fields needed for your document on spreadsheets.	

OK

Original Description		?
Delivery Medium	Electronic: Attached	
File Name	Choose File P&D Paper Samples.pdf	
Platform	◉ PC ○ MAC	
Source Format	PDF ▼	*If "Other", describe in comments*
Comments	Upload a PDF version to make sure your font, spacing and margins convert properly.	

OK

Screen 5: Addressing/Mailing Options

- Is Mailing Required
  - Check this box ONLY your order is a mailer being sent out via USPS.
  - For your addressing/mailing information to show on the final eSR, this box must be checked.
  - P&D delivery drivers do NOT see this information.
- How many records on file?
  - Indicate how many <u>addresses</u> this is being mailed to.
    - If we are merging the address fields, this is the number of addresses on your Excel file.
    - If you are sending a PDF document that has already been merged with your addresses, please:
      - Indicate how many total pieces are being mailed.
      - Make sure the addresses are placed correctly and the mailing panels are set up correctly.
  - How will we receive your mailing list?
    - Click Data File. (We do not use labels.)
  - Postage Class
    - Quantities under 2,000 typically mail with 1st class postage.
    - Quantities exceeding 2,000 could qualify for less expensive postage.
  - Carrier Route (also known as Simplified Mailing)
    - Select this option if you are interested in sending this to every household and/or business within a specified carrier route.
- Addressing/Mailing Comments
  - Indicate all important mailing information such as:
    - Use envelopes held at P&D (include envelope order SR# or other info)
    - Send as Self-Mailer
    - Which Carrier Routes you want a Simplified Mailing to be sent to.
- Contact P&D, or review the Mailing Information pages at the end of this document for more details.

Screen 6: Printing Options

Entering this information accurately helps avoid miscommunications as well as delays in processing when orders have to be put on hold to decipher requests, wait for replies or research past orders.

- No. of Originals
  - This is <u>usually</u> the number of PDF pages in your document.
  - If we are merging a mail-list for you, use the number of addressees on your spreadsheet.
  - Business Cards: Enter the number of different cards being requested.
- No. of Copies
  - Put the total number of <u>finished pieces</u> for each original.
    - Example- For 1000 cards set 4 up on a sheet put 1000 (not 250).
  - Business Cards: Enter 1 for 1 box of 360 cards (2 for 2 boxes)
- Paper Selection
  - Use the drop-down box to select your paper. (Click <u>here</u> for more information)
  - Not sure which paper? Select "Special" and describe it in the comments box.
- Paper Color
  - Type in the color preference. (Click <u>here</u> for more information)
- Ink/Toner Color
  - This defaults to black. Make sure to type "color" if you want it printed in color.
- Printing Options Comments
  - Use this area to type in more details such as: Full Bleed, Shrink to Fit, or other important information.
- You can use Covers/Inserts/Tabs/Dividers lines for eSRs with multiple similar jobs on the same ticket.

Printing and Copying Service Request - Detailed description of your job #1245140

Printing Options [?]

	No. of Originals	No. of Copies	Paper Selection	Paper Color	Ink/Toner Color
Text	100	20	AEPP 20# WHITE-11	White	Black
Comments		For basic details. Not sure what paper? Describe it here.			
Covers	2	20	Special/Other (Specify)	White	Color
Comments		Front- Single Sided, Back Blank			
Inserts	0	0	AEPP MOHAWK TEXT 12x18		Black
Comments					
Tabs	0	0	REC 90# WHITE-11	White	Black
Comments					
Dividers	2	100	REC 90# WHITE-11	White	Black & Color
Comments		Handout Card Doc- Front color, back black. 100 total cards 2 up.			

- REC=Recycled papers meeting minimum EPA post consumer waste standards (usually the standard is 30%).
- AEPP=Alternative Environmentally Preferable Papers (usually contains 100% post consumer waste).

Printing Options Comments

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- This area is for more detailed info.
- OK to the Covers/Inserts/Tabs/Dividers lines for
eSRs with multiple jobs on the ticket.
```

Screen 7: Finishing Options

- Finished Size
    - Use the drop-down menu to select your finished paper size.
    - Other: Indicate special sizing or if the document should be "Cut to Bleed".
- Single Sided/Double Sided
    - IMPORTANT Make sure to check whether the document should be single or double sided. (Copy per original only helps us if there is a hard copy to review.)
    - Head-to-head: Both sides are head up which is standard for double sided.
    - Head-to-foot: The back is upside down. (This is sometimes used for a book that is bound at the top or landscape printing to be placed in a binder.)
- Assemble/Collate
    - Check this box to assemble the pages into sets (vs in separate stacks).
- Saddlestitch
    - Check this box for a booklet that will be folded then stapled down the spine.
- Fold
    - Use the drop-down box to indicate the type of fold you want.
    - Other: Indicate special folding instructions.
- Cut
    - Check this box if we need to cut the job to size.
- Staple
    - Use the drop-down box to indicate how we should staple this job.
- Drill
    - Select the appropriate drill count/placement from the drop-down menu.
- Tab/Wafer
    - This box should only be checked when sending a self-mailer which is folded and mailed without an envelope.
- Finishing Instructions
    - Type any instructions for clarifying the above information. (Example: No Staple- Separate set with colored slip sheet.)

Printing and Copying Service Request - Detailed description of your job #1245140

Finishing Options				?
Finished Size	8.5x11 ⌄	Other		
Single Sided/Double Sided	◉ Copy per original ○ Single Sided ○ Double Sided: head-to-head ○ Double Sided: head-to-foot			
Assemble/Collate	☐			
Saddlestitch	☐			
Fold	No ⌄	Other		
Cut	☐			
Staple	No ⌄	Other		
Drill	No ⌄	Other		
Tab/Wafer	☐			
Finishing Instructions				

- Coil: Binding books by threading plastic coils into punched holes.
    - Check this option for a spiral coil bind. (Black is the standard color)
- Comb: Binding books by threading plastic "combs" into punched holes.
    - We can do comb binding but usually recommend coil.
- Tab/Cut: Dividers that are cut to cascade in "banks" of 2, 3, 4, 5, or 6.
    - Select the appropriate tab cut from the drop-down menu
- Score: A crease put on heavy paper to help it fold better.
    - Check this box if the job needs a score for folding purposes.
- Perforate: Making a line of small punctures in paper for easy tearing in a straight line.
    - Check this box if the job needs a score for folding purposes.
- Laminate: Clear plastic coating.
    - Check this box if the job needs laminating.
    - Select the thickness to the right
        - Standard thickness is 3 mil. (Choose 5 mil for something a little heavier.)
        - Please, note we do not offer 1.5 mil laminating which is the default.
    - Indicate whether you want it "encapsulated" (sealing with a clear boarder) or "flush" (trimmed to size) in the Bindery Instructions box below
- Foil/Emboss: Foil stamping and embossing an image on paper with a die.
    - Click this option if your job needs to have a foil stamp and/or embossing.
- Number: Consecutive numbering. (Standard color is black. Color may cost extra.)
    - Choose the drop-down option for where your numbering needs to be.
    - If it is not "standard upper right" you will need to show a sample.
    - Starting Number: Enter what the 1st number should read.
- Bindery Instructions
    - Include any other clarifying information about your bindery needs.

Printing and Copying Service Request - Detailed description of your job #1245140

Bindery Options				?
Coil	☐	Color	Black	
Comb	☐	Color	Black	
Tab Cut	No ⌄			
Score	☐ If checked, sample required			
Perforate	☐ If checked, sample required			
Pad	No ⌄			
Laminate	☐	Thickness	1.5 mil ⌄	
Foil / Emboss	☐ If checked, specify details in Bindery Instructions			
Die Cut	No ⌄	Other		
Number	No ⌄	Starting Number	1	
Bindery Instructions				

Screen 9: Review and Submit

- <u>Carefully</u> review the order.
  - If you need to make edits in a section, click on the box with the pencil to revise that section.
- Submit: Once all of the information is correct, click the green button in the upper left corner.
  - Once submitted, orders cannot be altered.
    - If you need to make a correction, email <u>P&D</u> as soon as possible and provide us with your service request number.
    - Please, do NOT submit a second service request as this can lead to duplicate orders.
  - Orders that are not submitted are saved as a draft and can be pulled up again by going to <u>Main Menu</u> → <u>Request Search</u>.

Printing and Copying Service Request - Detailed description of your job #1245140

ⓘ You are almost finished. Please click the submit button to complete your request.

[Submit] [<< Back] [Delete]

Go to Main Menu   Printer Friendly

General Information				✎
Due **11/10/2022**	Status: **Draft**		SR#**1245140**	
Request Title: **Detailed description of your job**			Form Number:	
Creation Date: **11/9/2022 8:51:50 AM**		Submit Date: **11/9/2022 9:00:48 AM**		

Created By	Shipping Instructions	✎
Lisa Kato-Fieldhouse **Printing & Distribution** **503-823-4448**	**P&D/124/Lisa Kato** **- Delivery date is flexible?** **- No later than _____?** **Lisa Kato-Fieldhouse** **503-823-4448**	

Billing Information	✎
City Cost Object: **O:9PKPR0032011 - DISHMAN CC - ARTS**	

Printing Options ✎

	Originals	Copies	Paper Selection	Paper Color	Ink/Toner Color
Text	6	220	**REC 70# WHITE/COLORS-11**		**Black/Color**
	Comments: **Front page is full color with thicker paper for mailing. Rest is 20# white with black toner.**				

Originals ✎

Print-Ready / Preparation Required: **Fill out only if not print-ready. Include details of what you need.**				
Delivery Medium	File Name	PC-MAC	Source Format	Comments
Electronic: Attached	**Sample Delivery Spreadsheet for PnD.xlsx** 📎	**PC**	**Excel**	**ONLY include the merge fields needed for your document on spreadsheets.**
Electronic: Attached	**P&D Paper Samples.pdf** 📎	**PC**	**PDF**	**Upload a PDF version to make sure your font, spacing and margins convert properly.**

Addressing/Mailing Options ✎

Records on File: **220**	Mailing List: **Data File**	Postage: **First Class**	
Addressing/Mailing Comments: **Use envelopes stored at P&D for PP&R under eSR 1245555. Add "To Current Resident" to addresses.**			

Finishing Options ✎	**Bindery Options** ✎
Finished Size: **8.5x11** Double Sided: **head-to-head** **Assemble** Fold: **Third** Staple: **One Upper Left** **Tab/Wafer**	

Instructions/Comments

Printing - **This area is for more detailed info.** **- OK to the Covers/Inserts/Tabs/Dividers lines for eSRs with multiple jobs on the ticket.**	✎
Special	✎
P&D	✎

SAMPLES

Complex Orders: Example of Spreadsheet

If you have a complex order that has multiple originals needing various totals delivered to several locations, please, make sure to upload a spreadsheet that includes a clear description of:

- How many of each original we need to print?
- Any important printing information we should know.
- The location/building code/suite/person where these should be delivered.
  - Putting the correct inter-office code, suite number and recipient is important to ensure that the order gets delivered to the on-site staff who receive the order.

English	Spanish	Vietnamese	Chinese	Russian	Printing Instructions	Delivery Date	Location	Inter-Office
							Charles Jordan Community Center	249 Attn: Larena Dawson 503-823-0203
							Columbia Indoor Pool	385 Attn: Teresa O'Loughlin
							Community Music Center	835 Attn: Gregory Dubay 503-823-3177
							Creston Outdoor Pool (Send to MSCC)	Send to MSCC/445 Attn: Evan Lilly
							East Portland Community Center	404 Attn: Neal Brown 503-823-1996
							Grant Outdoor Pool (Send to EPCC)	Send to EPCC/404 Attn: Sarah Wiggins
							Matt Dishman Community Center	350 Attn: Amourie Downing 503-823-3673
							Montavilla Community Center	No Code Attn: Robert 503-823-4101
							Montavilla Outdoor Pool (Send to EPCC)	Send to EPCC Attn: Sarah Wiggins
							Mt. Scott Community Center	445 Attn: Adam McGowan 503-823-3183
							Multnomah Arts Center	280 Attn: Michael Walsh 503-823-2787
							Peninsula Outdoor Pool (Send to MDCC)	Send to MDCC/350 Attn: Steve Kavanagh
							Peninsula Park Community Center	390 Attn: Jennie Birt 503-823-3620
							Pier Outdoor Pool (Send to MDCC)	Send to MDCC/350 Attn: Steve Kavanagh
							Sellwood Outdoor Pool	Send to SWCC/151 Attn: Lisa Osterberg
							Southwest Community Center	151 Attn: MaryAnn Thibeault 503-823-2840
							St. Johns Community Center	238 Attn: Evan Lilly 503-823-3192
							Wilson Outdoor Pool	Send to SWCC/151 Attn: Lisa Osterberg
0	0	0	0	0	<--Total Copies			

Standard Paper Samples

These are our standard paper options. Outside of supply chain issues they are readily available or easy to obtain. Please note that special order papers are also available but add time to processing.

Link to Online Paper Samples

- www.portland.gov/sites/default/files/2020-03/pd-paper-samples.pdf

WHITE PAPER

20# Bond (available in 30% PCW and 100% PCW)
Stocked in: 8.5 x 11, 8.5 x 14, 11 x 17

60# Text - Exact Opaque White
Stocked in: 8.5 x 11, 11 x 17

70# Text - Exact Opaque White
Stocked in: 8.5 x 11, 11 x 17

100% PCW OPTIONS

24# Text - Environment White
Stocked in: 8.5 x 11

24# Text - Environment Natural
Stocked in: 8.5 x 11

28# Text - Mohawk Color Copy
Stocked in: 8.5 x 11, 11 x 17

80# Text - Environment White
Stocked in: Parent Size

80# Text - Environment Natural
Stocked in: 8.5 x 11, Parent Size

80# Cover - Mohawk Color Copy
Stocked in: 8.5 x 11, 11 x 17

80# Cover - Environment White
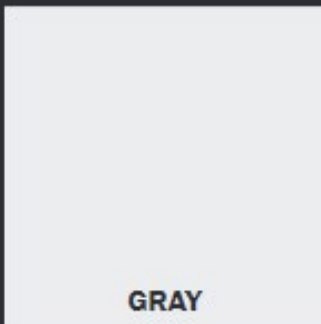Stocked in: 8.5 x 11, 11 x 17

80# Cover - Environment Natural
Stocked in: 8.5 x 11, Parent Size

PASTELS

Recycled Content 30% PCW

Color availability varies by size and paper weight

GREEN

BLUE

CANARY

PINK

SALMON

IVORY

GRAY

ORCHID

GOLDENROD

ROYAL FIBER

Recycled Content
30% PCW

Color availability varies by size and paper weight

NATURAL

CREAM

ICE BLUE

GRAY

WHITE

ASTROBRIGHTS

Recycled Content 30% PCW

Color availability varies by size and paper weight

MARTIAN GREEN

ORBIT ORANGE

PLANETARY PURPLE

RE-ENTRY RED

LUNAR BLUE

SUNBURST YELLOW

GALAXY GOLD

CELESTIAL BLUE

GAMMA GREEN

MAILING INFORMATION

Printing and Mailing Guidelines Website

- For more information see: www.portland.gov/omf/bts/pd/print-mail-guidelines

Self-Mailer Layout Guide

Self-Mailer Layout Guide

8.5 x 11 sheet

Recommended fold: third fold (tri-fold)

- TABS: Requires TWO sealing tabs along top open edge
- PAPER WEIGHT: Requires 70# text for single sheet
- ADDRESS PANEL PLACEMENT: Requires placement on middle panel

Other folding option: half fold

- TABS: Requires TWO sealing tabs along top open edge
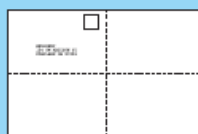- PAPER WEIGHT: Requires 100# text for single sheet
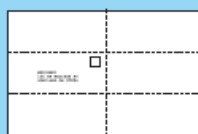
Thirds **Half**

8.5x14

Folding options: third fold or quarter fold

- TABS: Requires TWO sealing tabs along top open edge
- PAPER WEIGHT: Requires 70# text for single sheet
- ADDRESS PANEL PLACEMENT: Requires placement on middle panel(s)

Thirds **Quarter**

11x17

Recommended: half fold + half fold = quarter fold

- TABS: Requires TWO sealing tabs along top open edge
- PAPER WEIGHT: Requires 70# text for single sheet
- ADDRESS PANEL PLACEMENT: Requires placement on back top panel
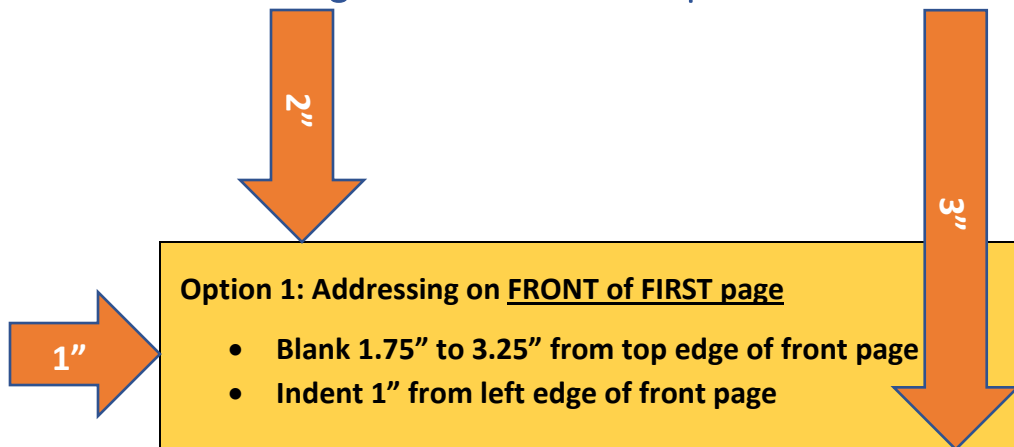
Other folding option: half fold + third fold

- TABS: Requires TWO sealing tabs along top open edge
- PAPER WEIGHT: Requires 70# text for single sheet
- ADDRESS PANEL PLACEMENT: Requires placement on back middle panel

Half + Half

Half + Third

Contact P&D customer service at 823-4448

- To discuss your self-mailer options and layout requirements.

- To inquire about Business Reply Mail and how to incorporate into your self-mailer layout.

- Ask any general printing, copying and distribution questions.

Addressing for Window Envelopes

2" → **1"** →

Option 1: Addressing on <u>FRONT of FIRST</u> page

- **Blank 1.75" to 3.25" from top edge of front page**
- **Indent 1" from left edge of front page**
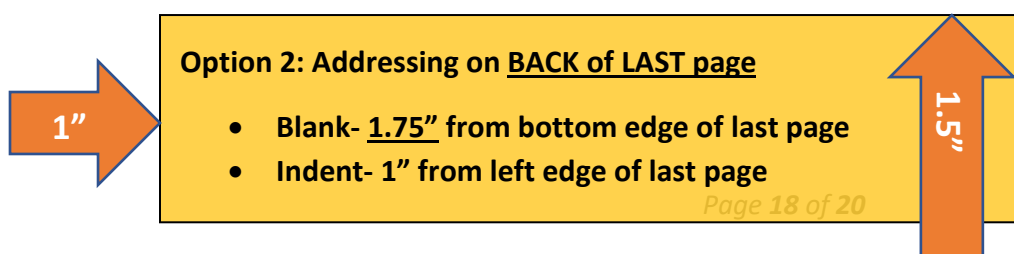
3" ↓

Document Format

- To ensure spacing and fonts come out correctly, please, send us a <u>PDF</u> document.
- If we are merging addresses onto the document, there needs to be adequate room to merge the addresses.
- You can format the document in the following ways:
  - Option 1: Leave a <u>gap between 1.75" and 3.25"</u> from the <u>top of the page</u>.
  - Option 2: Leave the <u>bottom 1.75" blank</u> on the <u>back of the last page</u>.
  - Alternately, we can insert a 1/3 sheet of cardstock with the addresses on them.
- If you are providing a multi-page PDF with addresses already merged, please, make sure that your address placement can be viewed through a window envelope.

Envelope Orders

- If your mailing needs to be in an envelope, keep in mind that you will need to either:
  - Send us the envelopes you want us to use.
  - Or place an order for the envelopes which takes 7 business days to process.
    - Priority processing can be done for an additional 30% rush fee.
    - To avoid delays in processing, please, make sure to reference the service request number from the envelopes stored at P&D whenever placing a separate request for mailing.

1" →

Option 2: Addressing on <u>BACK of LAST</u> page

- **Blank- <u>1.75"</u> from bottom edge of last page**
- **Indent- 1" from left edge of last page**

1.5" ↑

Simplified Addressing Mail (Carrier Routes)

Simplified address mailings are those in which the recipient's name and address is NOT printed on the mail piece. The USPS allows official government mail sent by a government agency to use one of three simplified addresses in place of the name and address.

Selecting Simplified Address Recipients

- Postal Customer = Delivers to ALL mailboxes (residential and business)
- Residential Customer = Delivers ONLY to residential mailboxes.
- Business Customer = Delivers ONLY to business mailboxes.

Determining Routes and Printing Amounts

To determine routes and printing counts you can contact P&D or, go to:

- www.usps.com/business/every-door-direct-mail.htm
- This USPS tool will allow you to plug in zip codes and view carrier routes and counts.
- The city does not qualify to use Every Door Direct Mail (EDDM) as it is geared for small businesses, but the carrier route information is the same.

Submitting the Order

With quantity determined and layout finalized, you can place an electronic service request for printing with a carrier route mailing.

- Your selected routes will need to be listed on the eSR "Addressing/Mailing" section or an attached Excel file.
- We will add the correct postage indicia and carrier route addressing verbiage.
    - Make sure to indicate the appropriate verbiage for your intended recipients: Postal Customer, Residential Customer, or Business Customer.

Turnaround Times for Printing

Print turnaround time will depend on the final print quantity.

- Mailings under 3000 pieces can generally print in 1-2 days in our copy center.
- Depending on the job specifications, larger quantities would typically be printed in 3-7 business days (sometimes longer).

Turnaround Times for Mailing

Once the piece is printed, we send it to a mail house for carrier route sorting.

- We will provide the mail-house with instructions based on the routes you supply to us.
- Typically, the mail-house will have the job ready to mail in 1-2 days.
- After it is dropped at the USPS, the mail processing time can vary depending on the USPS workload.
- Generally, we estimate that carrier routes take 2-4 USPS business days to reach mailboxes BUT this can vary, and we have no control over the USPS delivery timeframes.

Ancillary Service Endorsements

The "Move Update Standard" was created by the USPS to curb the costs associated with undeliverable mail. Using Ancillary Service Endorsements is one way to comply with the USPS "Move Update Standard" and still receive postal presort discounts.

Requirements

- Reference the [Ancillary Service Endorsements](#) information on our website for an overview of the specific endorsements available, placement locations, actions, time limitations, and fees for each.

Exceptions

- Ancillary Service Endorsements are required on all presort mail that contains a proper name (person or business) unless a mailing list has been run through the National Change of Address (NCOA) certification process.
    - Evidence of this NCOA (commonly referred to as a list scrub) via an electronic PDF certificate must be provided to the presort mail house if an endorsement is NOT being used.
    - The NCOA update must have been completed at least 95 days before the mail drop, otherwise an ancillary service endorsement must be used.
- An Ancillary Service Endorsement is not necessary when the addressee is "generic" (no proper name) or if a generic component is included after a proper name addressee.
    - The addressing samples below do NOT require an ancillary service endorsement because there is a generic component in the addressee line:

      CURRENT OCCUPANT   JANE SMITH OR CURRENT RESIDENT
      123 ANY STREET   123 ANY STREET
      PORTLAND OR 97204   PORTLAND OR 97204

Options

- If it is being mailed to specific addressees, let us know what endorsement we should print on the mail panel. (If none is listed, we use "Return Service Requested" by default)
    - The most commonly used endorsements are:
        - Return Service Requested
        - Forwarding Service Requested