



We are relatively new to in house mailing and are wondering how other printers/mailers keep track of postage for mailing jobs.

We don't seem to have a good handle on whether postage has been paid, what jobs the postage is for and how much postage was used, especially stamps.

Does anyone have a system in place that works really well for them that they could share with me?

We believe industry standard is postage is due up front, we do not mail unless check is in hand. The only circumstance we front postage is if the client is willing to pay it with a markup. Then, we treat it as an outside cost, utilizing our PO system to track \$\$ amounts and is associated with job number/customer.

We process the mail data and create an invoice with postage amount. This is a pre bill or partial bill. We do not mail until we have postage in our hands. Then the pre bill and the payment of postage are stated on the invoice.

I had a specific person responsible for preparing all mailings.
That is a priority.
That person's relationship with the main branch post office in your area will be key.
Secondly we prepared paperwork for each individual mailing which indicated the postage dollar amount.
We then requested that dollar amount from the client.
That can be done one of two ways.
The client has a permit already in place which they need to deposit the funds into a few days prior to the mailing or the vendor holds a permit that they allow their clients access to.
Either way the paperwork will have the postage amount on it.
As far as hand applying stamps that I would simply bill as a non taxable item on an invoice with additional costs for labor.
Ideally you would want most if not all mailings to have a permit printed on either the piece you are mailing or the carrier envelope.
The number of pieces you are mailing and the type of service you are requesting will determine your postage costs as well.
You want to carry as little postage as possible for clients. It is a cash drain and it is not necessary or expected but if client is allowed to use your cash to pay for postage they will.
Hope this helps.

CAPS accounts work well. The postage is automatically deducted from your clients debit card when the mail is presented.

Below is the process used for tracking postage.

1st we create an estimate for the postage cost.

The estimate is based on either the provided mail list or a projected mail quantity. A mock up on the actual stock provides an accurate weight and dimension to determine the processing category for the mail piece.

2nd a postage invoice is created and sent to the customer so they can prepay the postage.

The invoice will tie the payment back to the job once it is received. If the estimated amount is more or less than the actual postage an adjustment will be given on the final invoice.

3rd when the job has been completed through production our data processing department will request the postage needed from our accounting department.

This serves as a double check to make sure we have received payment from the customer. If we have not received the money accounting may decide to hold the mailing until payment is received. The sales person may need to get involved to ensure payment is received.

We use a 3rd party program called DAT-MAIL from WindowBook to keep track of all of our postage used for each job. <https://www.windowbook.com/Products>

We enter all of our postage used including Stamps, Meter and Permit Imprint into DAT-MAIL. All postage usage is entered into this one program so when accounting bills the job they can see all of the postage and match the cost to the postage checks they have issued and what the customer has paid.
