

User Guide for

Sorting

September 2023

This a legally binding document forming part of the Agreement between you and Royal Mail



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1. Addressing

You will find general advice on how best to set out your addresses in the Machine-Readable Letters and Large Letters Guide, which is available on our technical website at http://www.royalmailtechnical.com/user_guide

1.1 Address accuracy

Your mail must be addressed in accordance with the address accuracy requirements set out in the following table:

Accuracy requirements	Products and options
No minimum address accuracy	<ul style="list-style-type: none">➤ 1st and 2nd Class with no additional options➤ Business Mail, Advertising Mail, Publishing Mail and Subscription Mail with Mailmark® option *Please see note below table.➤ Advertising Mail which is not machine-readable➤ Advertising Business Mail with Machine-readable Advanced**
90% address and postcode accuracy	<p>The following products except when using the Mailmark option and other than those specific product options requiring no minimum address accuracy (listed in row above)</p> <ul style="list-style-type: none">➤ Advertising Mail➤ Publishing Mail➤ Business Mail

* **Note:** Address, postcode & DPS accuracy are still as important for our Mailmark option mailings as they are for any mailing. We highly recommend that **every** item in a Mailmark option mailing has a full and accurate address & postcode printed on each item and a full and accurate postcode and DPS in the eManifest and encoded in the Mailmark barcode. The Mailmark option is for highly machine-readable mail. However, the Mailmark option allows address, postcode and DPS accuracy, compared to PAF®, to legitimately dip below; 90% for Business Mail, Advertising Mail, Publishing Mail and Subscription Mail mailings. Where Mailmark mailings fall below these address, postcode & DPS accuracy requirements invoice adjustments may be made. All Mailmark mailings that dip significantly below 90% will see invoice adjustments relating to poor quality addresses, postcodes and DPS.

**accurate addresses will help you maximise your discount

1.2 Managing Address Data

AddressNow

Capturing customer contact data is the first step in the customer journey for many businesses. Errors at this point have a significant impact further down the line. So, to uphold customer data quality from the start, it's really important for businesses to ensure they're doing everything they can to capture accurate and up-to-date address data in order to deliver a great customer experience.

AddressNow Capture from Royal Mail is an easy-to-use, pay-per-lookup, cloud-based service which provides you and your customers with a fast, simple and accurate way to lookup, validate and capture address data online in real-time. Visit our website at <https://addressnow.royalmail.com/> to find out more and to register for a FREE trial.

For general help with improving contact and address databases please contact datasales@royalmail.com and we can recommend an approach tailored to your needs.

PAF® contains over 30 million UK addresses, including approximately 1.3 million business addresses, including circa 200k vacant organisations and approximately 1.75 million postcodes, which we constantly update to maintain its accuracy.

Royal Mail supplies PAF® as raw data. There are three different PAF® files available:

1. **Main File:** The master database Main File contains complete postcode and address information for over 30 million UK addresses. Main File contains no software and the raw data within it must be processed for use through IT applications
2. **Compressed Standard File:** An expanded form of the Main File with over 30 million UK addresses in sequential order, as well as Delivery Point Suffix data
3. **Ranges File:** A similar format to the Compressed Standard File, it takes up less space by ranging numbered properties on the same postcode together in one record

Address format

The addresses held on PAF® are in a relational format, i.e. they are held as a series of alpha-numeric keys, or pointers, which relate to supporting files of Address element text rather than text. The supporting text files are:

- Localities File
- Thoroughfares File
- Thoroughfare Descriptor File
- Building Names File
- Sub Building Names File
- Organisations File

Each address on PAF® has an eight-digit number associated with it – the Address Key. This number in conjunction with the Organisation Key and Postcode Type identifies the address.

PAF® is available in both physical (CD) and electronic (SFTP) media formats.

The elements of an address – inland mail

You must include at least:

- one premise element
- one thoroughfare element
- one locality element
- postcode

If there is no thoroughfare element contained in PAF® this need not be included.

- each address element, as shown in the examples below, must be on a separate line of the address with the postcode included as the last line of the address
- the county, although not required, may be included as the penultimate

line of the address

- the phrases “England”, “Great Britain” or “United Kingdom” must not be used for addresses to the UK and posted within the UK

Example address:

	IDC Faydherbe
ORGANISATION	Royal Mail
SUB-BUILDING	South Wing
BUILDING NAME	Bell House
BUILDING NUMBER	B 25 Bell Complex
DEPENDENT THOROUGHFARE	The Mews
THOROUGHFARE	300 Western Road
DOUBLE DEPENDENT LOCALITY	Otterley
DEPENDENT LOCALITY	Hedge End
POST TOWN	OXFORD
POSTCODE	OX4 5ZZ

Please note:
The simplest way to ensure an address is correct is to check that all the elements in the appropriate PAF® record are present.

Premise elements

You must include at least one of these 4 elements, so that a single delivery point is defined. You don't have to include all the premise elements, even if they are included in PAF®, but building numbers must be applied on the same line as the Dependent thoroughfare or thoroughfare information.

	D Faydherbe Operations Director
Organisation	Royal Mail
Sub-building	South Wing
Building name	Bell House
Building number	B 25 Bell Complex

Thoroughfare elements

PAF® will give one of 3 possible combinations:

1. no thoroughfare: no need to include anything in this part of the address
2. a thoroughfare but not a dependent thoroughfare: include the thoroughfare
3. both a dependent thoroughfare and a thoroughfare: include the former. If space allows you can also include the thoroughfare, though it's not compulsory

Dependent thoroughfare	The Mews
Thoroughfare	300 Western Road

Locality elements

You must include at least one locality element. You don't have to include them all, even if they are included in PAF®. The post town should have the first character(s) in capitals for example: Wigan, Milton Keynes, Ross On Wye, on a single line:

- the post town maybe followed by a county on the penultimate line of the address, provided that the space between post town and county is no more than two character spaces and that the postcode is on the last line of the address
- the county and the postcode may be on the same line provided there are one or two character spaces between the two elements
- the post town and postcode can be on the same line, provided that the post town precedes the postcode and the space between the two elements is one or two character spaces

Double dependent locality	Otterley
Dependent locality	Hedge End
Post Town	OXFORD

Postcode

The address must contain the full and accurate postcode:

- the postcode must be able to generate an address from PAF® which can be matched to the minimum requirements above (at least 1 premise element, one thoroughfare element and one locality element)
- the postcode should always appear in capital letters on the last line of the address
- please do not underline or punctuate it
- please put 1 or 2 character spaces between the two parts of the postcode.
- The first part (i.e. OX4) is the outward code, the second (i.e. 5ZZ) is the inward code

Post Town	OXFORD
postcode	OX4 5ZZ

For Royal Mail's International Business Services, depending on the options you select, we offer a free returns service for items which cannot be delivered overseas. Please note that all items must carry a valid UK return address. You cannot use an overseas address for any items you wish to be returned should it be unable to be delivered.

Summary of postcode and address requirements

	1	2	3
Products and options	Minimum postcode AND Address match to PAF®	Maximum partial postcode (e.g. NE) and/ or Post town match to PAF®	Options for remainder of mail where the address elements could not be matched to PAF®
Advertising Mail with Low Sort Mailmark	Not applicable but please note that you should always maximise the level of address, Postcode & DPS accuracy. We strongly recommend that at least 90% of your items are fully and accurately matched to PAF® in order to avoid invoice adjustments		
Advertising Mail with Low Sort OCR	90%	10%	Business Mail with no additional options
Advertising Mail with Low Sort Manual	90%	10%	Business Mail with no additional options
Advertising Mail with High Sort	90%	10%	Business Mail with no additional options
Advertising Mail with Machine-readable Mailmark	Not applicable but please note that you should always maximise the level of address, Postcode & DPS accuracy. We strongly recommend that at least 90% of your items are fully and accurately matched to PAF® in order to avoid invoice adjustments		
Advertising Mail with Machine-readable OCR	90%	10%	Business Mail with no additional options
Business Mail 1st Class with Low Sort Mailmark	Not applicable but please note that you should always maximise the level of address, Postcode & DPS accuracy. We strongly recommend that at least 90% of your items are fully and accurately matched to PAF® in order to avoid invoice adjustments We strongly recommend that at least 90% of your items are fully and accurately matched to PAF® in order to avoid invoice adjustments		
Business Mail 1 Class with Low Sort OCR	90%	10%	Business Mail with no additional options
Business Mail 1 Class with Low Sort Manual	90%	10%	Business Mail with no additional options
Business Mail 1 Class with High Sort	90%	10%	Business Mail with no additional options

Products and options	Minimum postcode AND Address match to PAF®	Maximum partial postcode (e.g. NE) and/ or Post town match to PAF®	Options for remainder of mail where the address elements could not be matched to PAF®
Business Mail 1st Class with Machine-readable Mailmark	Not applicable but please note that you should always maximise the level of address, Postcode & DPS accuracy. We strongly recommend that at least 90% of your items are fully and accurately matched to PAF®		
Business Mail 1st Class with Machine-readable OCR	90%	10%	Business Mail with no additional options
Business Mail 1st Class with Machine-readable Advanced	Not applicable but please note that you should always maximise the level of address, Postcode & DPS accuracy. matched to PAF® in order to maximise discounts		
Business Mail with Low Sort Mailmark	Not applicable but please note that you should always maximise the level of address, Postcode & DPS accuracy. We strongly recommend that at least 90% of your items are fully and accurately matched to PAF®		
Business Mail with Low Sort OCR	90%	10%	Business Mail with no additional options
Business Mail with Low Sort Manual	90%	10%	Business Mail with no additional options
Business Mail with High Sort	90%	10%	Business Mail with no additional options
Business Mail with Machine-readable Mailmark	Not applicable but please note that you should always maximise the level of address, Postcode & DPS accuracy. We strongly recommend that at least 90% of your items are fully and accurately matched to PAF		
Business Mail with Machine-readable OCR	90%	10%	Business Mail with no additional options
Business Mail with Machine-readable Advanced	Not applicable but please note that you should always maximise the level of address, Postcode & DPS accuracy. matched to PAF® in order to maximise discounts		
Publishing Mail with Low Sort Mailmark	Not applicable but please note that you should always maximise the level of address, Postcode & DPS accuracy. We strongly recommend that at least 90% of your items are fully and accurately matched to PAF®		
Publishing Mail Low Sort OCR	90%	10%	Business Mail with no additional options
Publishing Mail Low Sort Manual	90%	10%	Business Mail with no additional options
Publishing Mail High Sort	90%	10%	Business Mail with no additional options
Publishing Mail with Profile High Sort	90%	10%	Business Mail with no additional options
Publishing Mail with Premium	90%	10%	Business Mail with no additional options
Subscription Mail with Low Sort Mailmark	Not applicable but please note that you should always maximise the level of address, Postcode & DPS accuracy. We strongly recommend that at least 90% of your items are fully and accurately matched to PAF®		

Columns:

1. the address must match the postcode; both sets of information must be on PAF®
2. the address must match the partial postcode (if included) and the Post Town; both sets of information must be on PAF®
3. this is the element of address data which cannot be matched to PAF® and which therefore cannot be matched to any Royal Mail Selection File code, Direct or Residue

1.3 Return addresses – undeliverable mail

We always recommend that you include a return address on every item that you send. This simple inclusion means that we're able to swiftly return any undeliverable mail to you. We currently do not charge for the return of undeliverable mail.

If you wish us to return undelivered items:

- Clearly mark all your items with a return address, correctly postcoded, on the back of the envelope and, if sending Mailmark barcode enabled mail pieces, include the postcode of the return address in the Mailmark barcode
- Please note: **We always require a human readable return address to be visible**
- We will use all reasonable attempts to return any letter included in a posting which for any reason is undeliverable, but we will only return it if it bears a legible return address on the item
- Any undeliverable items with a PPI will only be returned to the sender if a return address is shown

Our preferred specification for a return address is:

- Only one return address must be printed on the envelope
- The return address must be prefixed with the words 'Return Address'
- The return address must be a valid PAF address
- The addressee information should be included as the second line of the return address
- Only 'Lucida Gothic' or Letter Gothic' fonts must be used. Font size must be 10-12pt with normal character spacing and pitch set at 10-12 characters per inch.
- There must be a clear zone of 5mm round the return address
- The return address must be printed in 'Title Case', with the exception of the postcode which must always be printed in 'UPPER CASE'
- No text, patterning or graphics must be printed within the return address
- The return address must be printed as a 'block' of left justified text with uniform line spacing (1-4mm) and no blank lines
- Each individual element of the address must be on a separate line. Note that the house number and the street must always be printed on the same line
- The Postcode must be printed on the last line of the address or may be printed on the same line as the posttown (with a gap of 1-2 spaces)
- Only punctuation that is included in the PAF address should be included, or alternatively all punctuation can be removed
- The word spacing must be no more than 5mm
- The return address block skew must be no more than plus or minus 5°
- The preferred location for a return address is the back of the envelope, with the address centered within the top 40mm
- If the return address is on the front of an item, it must be in the top left hand corner, with no element closer than 75mm to the right edge and no closer than 12mm to the Delivery address

Please note:

- For our machine-readable products (letter and large letters) we have specific return address requirements which are detailed in the 'Mailmark Machine-readable letter and large letter' and 'Machine-readable letter and large letter' User Guides
- If your customer has a redirection in place, we will forward the item with no additional charges, allowing you to stay in touch with your customer wherever they are.
- Some categories of mail originating from government departments are not redirected

2. Postcodes

2.1 What are postcodes and why are they vital to our products?

Postcodes are an alphanumeric code allocated by us to identify the location of an address or group of addresses and it comprises of an outward postcode and an inward postcode.

2.2 Postcode formats

Whilst it's not possible to validate full postcodes without accessing our PAF®, postcode formats can be validated using the following guidelines:

Valid formats	Example postcode	Example of postcode district	Example of postcode sector
AN NAA	E2 5BZ	E2	E2 5
ANN NAA	M34 3AB	M34	M34 3
AAN NAA	DN5 7XY	DN5	DN5 7
AANN NAA	DN16 3HB	DN16	DN16 3
ANA NAA	W1A 4WW	W1A	W1A 4
AANA NAA	EC1A 1AA	EC1A	EC1A 1
AAA NAA	GIR 0AA	GIR	GIR 0

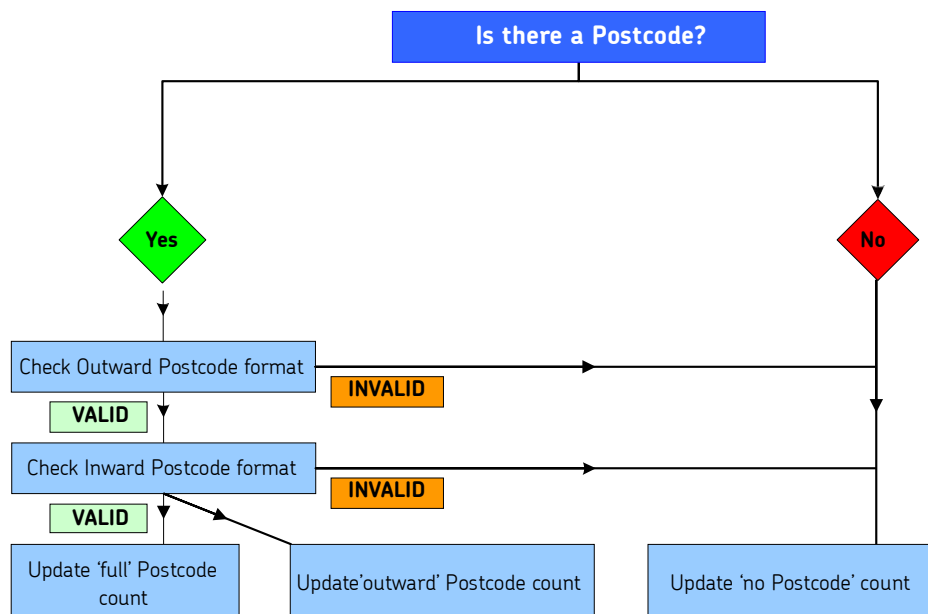
*GIR 0AA is a postcode that was issued historically and does not conform to current rules on valid postcode format. It is however, still in use.

Please note:

- the letters Q, V and X are not used in the first alpha position
- the letters I, J and Z are not used in the second alpha position
- the only letters to appear in the third position are A, B, C, D, E, F, G, H, J, K, S, T, U and W
- the second half of the postcode is always of consistent numeric, alpha and alpha format and the letters C, I, K, M, O and V are never used. These conventions may change in future if operationally required

2.3 Evaluating the postcode level

- A process of evaluation must be performed on all addresses within the mailing list in order to be presented as a sorted posting that requires a minimum level of address accuracy:
- the postcode level is indicated by the percentage of addresses with a full and accurate postcode, to sector level, as validated against the PAF®
- the postcode level relates only to the items in your posting, and not to the mailing list from which they were extracted. For example, a company's entire list may be 95% fully postcoded, but the portion of the list selected for posting may only be 85% fully postcoded. This portion of the list, therefore, would not be eligible for Advertising Mail, Publishing Mail, or Business Mail, as it does not achieve the 90% minimum entry level
- to meet the product postcode level, your postcodes must be valid against the PAF and of a valid format. If a postcode fits one of these formats, then for sortation purposes it is deemed to have a full postcode



Step 1

Locate the postcode within the address if it is not held separately from the other address text.

Step 2

The outward portion (postcode district) needs to be checked against the list of valid formats (see table on previous page). If the outward postcode format does not exist in the table, the postcode is considered invalid and added to the 'no postcode' count. At this point, it would be beneficial to highlight this incorrectly postcoded address for checking and amending at a later time. This will improve the quality of subsequent lists.

Step 3

If the outward postcode is valid, the inward portion also needs to be checked. This is a lot simpler, as there is only one valid format (see postcode format table). If, however, this portion is invalid, the outward postcode count should be updated. It would be helpful to highlight these addresses as well for later checking.

Step 4

When these checks are complete, only those addresses passing both checks should be added to the full postcode count.

3. The Royal Mail Selection Files

The Royal Mail Selection Files are a set of data files, defining the Direct and Residue selections by postcode for High Sort options and the Low Sort selections for our machine-readable products. They are used to sort mail for:

- Advertising Mail
- Publishing Mail
- Subscription Mail
- Business Mail

Obtaining a copy of the Royal Mail Selection Files

- the Royal Mail Selection Files can be accessed by visiting our website at www.royalmailtechnical.com
- if you cannot download the Royal Mail Selection Files, please contact the Royal Mail Technical Helpline on **020 7371 6957**

Keeping your copy of the Royal Mail Selection Files up to date

You must update your sorting systems each time a new version of the Royal Mail Selection Files is issued by us. If you don't, you risk delaying the delivery of your mail and losing your discount. We will always give you advance notice of any change but implementing those changes will remain your responsibility. Please ask your account manager for further details.

The Royal Mail Selection Files contain 5 (Direct) and 3 (Residue) digit reference numbers for all the outward postcode areas listed on PAF. Sortation software is used to match the postcodes and / or post towns on your address data to the Royal Mail Selection Files and the data is then sorted into an order as specified by yourself.

Implementing the Royal Mail Selection Files

You can choose to implement the Royal Mail Selection Files by either:

- implementing computer sorting, or
- purchasing a software package

Implementing computer sorting

Given the wide range of computer languages and operating environments, it is impractical to provide comprehensive programming information for all systems.

Integrating the products within your current IT system

Each of the processes needed to sort your postings can be integrated into your existing system. Because some of these need not be performed every time a mailing is created, this method will save you processing time.

Creating a self-contained system

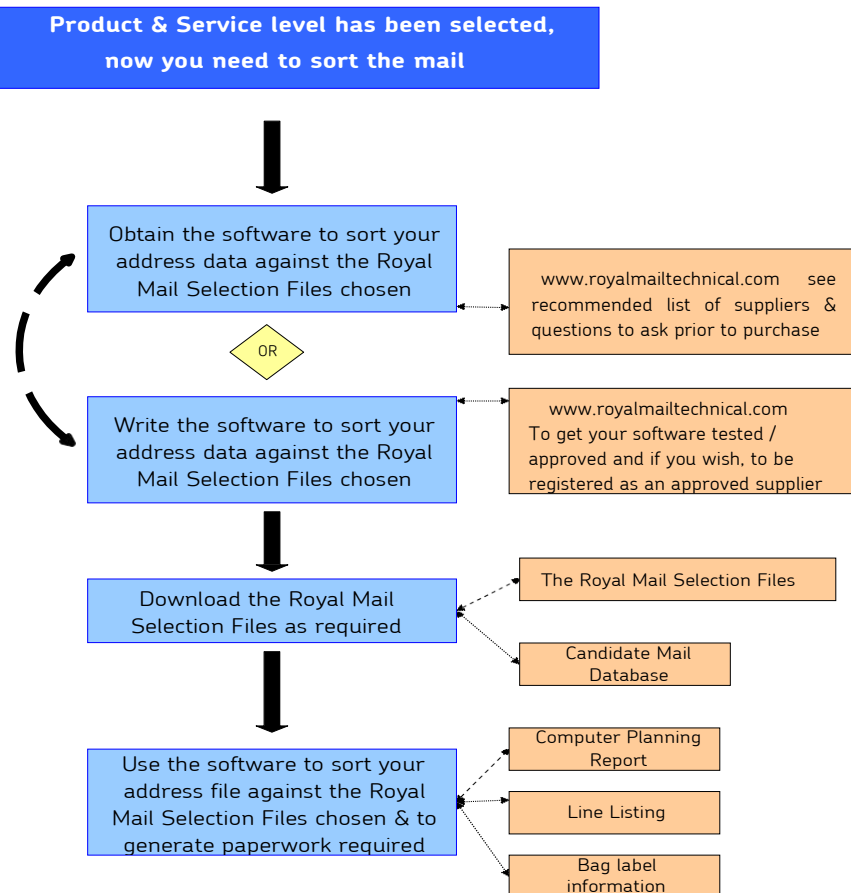
This method takes the output from your current mailing program, or a supplied mailing list, and processes it ready for your chosen product. Most of the companies on our software suppliers list (see below for further details) will provide you with this type of system. A self-contained system is often easier to create and update than an integrated solution. However, it will perform all the processes for each posting, and may therefore be less time efficient.

Buying a software package

In most cases, particularly if you use PCs, it is better to buy a software package to perform your sorting tasks for your products. We can provide a software suppliers list of approved suppliers that provide solutions for the majority of systems. However, before buying any package, you should take all appropriate measures to ensure it will do the job you require.

For our most up-to-date information on approved software suppliers, please contact your account manager or visit our website at www.royalmailtechnical.com.

4. Sorting your mail



4.1 Computer programmes to facilitate sorting

You can use a computer to run the sorting program for your posting. Where you do so the computer programme may produce some, or all, of the following:

- a computer planning report*
- a line listing*, showing a breakdown of the items and bags, bundles or trays in your posting by selection and on a cumulative basis, with final totals
- the addresses, on labels, or printed directly onto items bag, bundle or tray labels

*these items must either precede or accompany the mailing on its first collection.

The line listing, addresses and bag labels must always be produced in the same sequence. Any which are not produced by the computer must be manually prepared and provided as per the product requirements.

Software solutions that enable Mailmark barcode mailings are being developed. These solutions will build upon the existing sortation software solutions to also produce eManifests and pass the Batch information through to our eManifest Handling System (eMHS).

Advice on questions to ask software suppliers is available on our website at www.royalmailtechnical.com

5. Setting up a sortation system

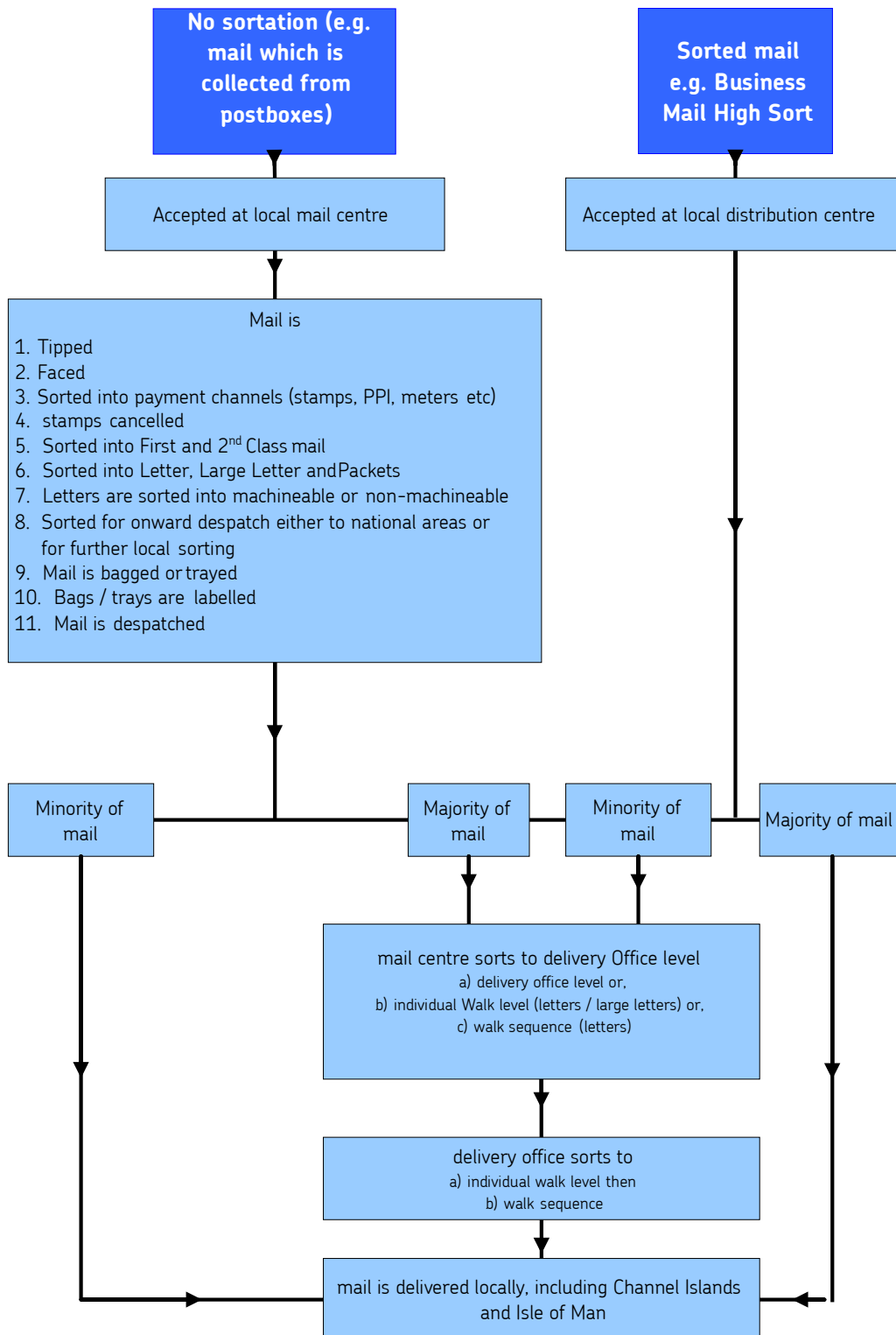
The Royal Mail Selection Files are the key to sorting your postings. They contain the entire list of postcode details grouped into the following selections. The way these are used depends on the product that you have selected:

- final or local delivery office (Direct selections within High Sort postings)
- sorting offices, based on postcode areas (Residue selections within High Sort postings)
- selections for machine sorting (Low Sort selections)
- mail centre selections

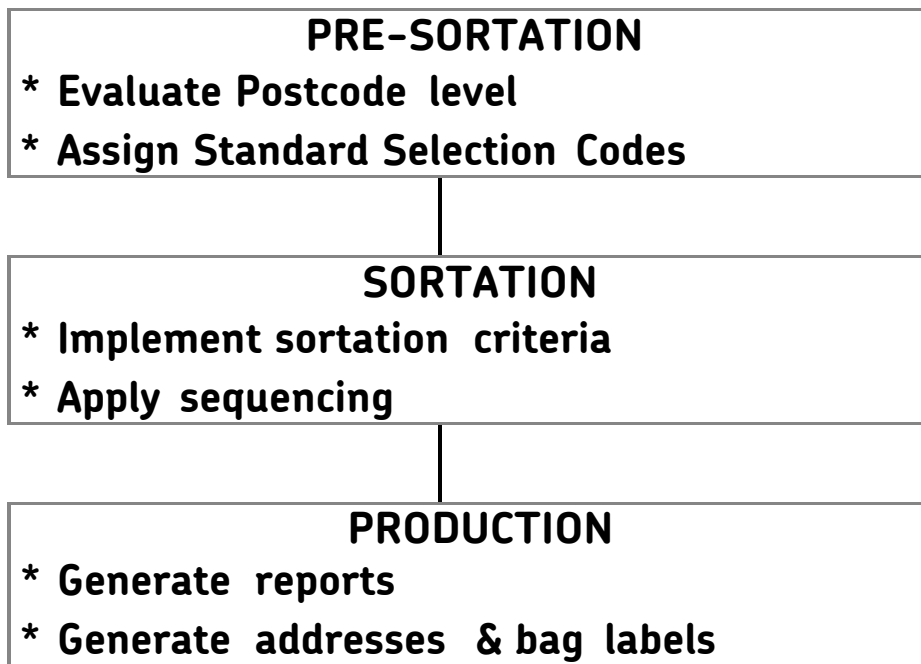
Your sortation system will need to cover all aspects of a posting, including:

- allocating selection codes
- sorting items
- producing reports and bag labels

How sorted mail differs from mail with no sortation



3 stages of setting up a sortation system:



Stage 1 - Pre-sortation

The pre-sorting stage will evaluate the postcode level and assign a SSC. Your software should perform these two tasks separately and it can be done either:

- once per list, and the results held as part of that list (saving on processing time), or
- performed every time a sortation run is required

Evaluating the postcode level

- Postcode statistics for a particular list can be stored and updated whenever an address is added, changed or deleted. The only information that would be required to maintain an accurate set of statistics is the number of full postcodes, outward postcodes and no postcode records. This method is useful mainly with lists that have relatively low rates of change, and are always mailed in their entirety (e.g. periodical subscription lists)
- If you choose this method, you should make sure that any new addresses added to the mailing list carry a full and accurate postcode and address

Assigning SSCs

- To allocate an SSC to a postcode address, only one of the database files is required – the SORTA file. This file is a look-up table of postcodes and SSCs
- All postcode districts (and, where necessary, postcode sectors) which are valid at the time of the release of a new set of Royal Mail Selection Files, and those anticipated changes due throughout the lifetime of the Royal Mail Selection Files, are included in the SORTA file. If the postcode district (or sector) does not exist at all in SORTA, then the postcode is not current

Stage 2 - Sortation

High Sort

- Items are divided into either Direct or Residue selections
- An SSC is allocated to an item and the total number of items being sent to that SSC determine which Residue or Direct selection the item falls into
- Once the Direct and Residue selections have been determined, the mailing list should be grouped by SSC and sorted into the appropriate sequence

Low Sort

- For Low Sort the sorting stage simply groups together postcode areas as defined by the Royal Mail Selection Files.

Stage 3 - Production

The production stage generates the documentation needed for the posting. For further details on the production of documentation please refer to the Documentation User Guide available at www.royalmailtechnical.com

The following paragraph summarises the structure of the SSC and where you can obtain them.

Levels of selection within the files

The Royal Mail Selection Files currently contain a sorting plan of 1,529 selections and is applicable to all Advertising Mail, Publishing Mail, Business Mail 1st Class and Business Mail with High Sort options. It is possible to manually sort your items – details on how to do this are described later, and further information can be found in the 'Manual Sorting' paragraph of this section of the user guide.

There are 2 selection levels within the files:

High Sort - Direct selections

These are sorted to local Delivery Office level. There are approximately 1,529 groups of postcodes identified as Direct selections within the Royal Mail Selection Files.

The selections for the following 2 product variant options are identical but labelling requirements will differ:

- **High Sort Residue selections** - these are sorted to postcode area level. As their name suggests, they are for mail that cannot be or, through choice is not, sorted into Direct selections. There are 86 Residue selections in the Selection Files
- **Low Sort selections** - these selections are used when you have chosen to use one of our machine-readable Low Sort products where the mail is sorted according to the Mail Centre. There are 86 Low Sort selections and they are the same as the High Sort Residue selections above

6. Standard Selection Codes or SSCs

The SSC is a unique numeric code for each Direct (5 digits) or Residue or Low Sort (3 digits) selection, used to sequence addresses, identify selection breaks and match items to mailing bag labels

6.1 SSC breakdown

The SSC is a number comprising up to five digits made up of:

- the first three digits identifying the Residue/ Low Sort selection code, for example 125 is the Residue selection code for the CW, WA and WN postcode areas. This defines the area or mail centre to which it belongs
- for High Sort options, a further two digits is added to identify the position of the Direct selection code within the Residue, for example 12553 for St Helens, WA11. The only valid format for a Direct selection code is all 5 digits, including its associated Residue Code, defined as the first three (3) digits described above

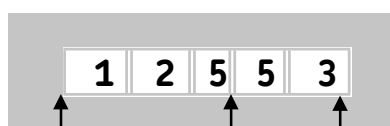
Example of a Standard selection code:

LOW SORT & RESIDUE CODE



MAIL CENTRE IDENTIFIER

HIGH SORT DIRECT CODE



RESIDUE
CODE

DIRECT CODE

- the two valid forms for a High Sort posting are the full SSC (e.g. Direct selection code 12553), and the Residue selection code (e.g. 125 or 12500)
- the only valid form for a Low Sort posting is the three digit code. You have the option to add two '0' to the end, for example 12500, if your software requires all fields to be used

Example of some Direct SSCs for the North West of England:

SSC	DIRECT SELECTION NAME	POSTCODE GROUP
12549	Skelmersdale	WN8
12551	St Helens	WA9
12552	St Helens	WA10
12553	St Helens	WA11
12554	Warrington	WA1-WA2
12555	Warrington	WA4
12556	Warrington	WA5 0-3, WA5 6-9
12557	Widnes	WA8
12558	Wigan	WN1, WN3
12559	Wigan	WN2

Using the SSCs

Showing the SSC code on each of your items is not a mandatory requirement but it is recommended, as it may be useful to identify selection breaks at the end of a production line. We recommend you print it above the name and address.

Selection breaks

How you identify selection breaks is determined by:

- whether addresses are in the form of labels, cut forms or laser printed output
- the nature of the labelling medium (Cheshire labels, self-adhesives, etc.)
- the proposed sequence of mailroom handling
- the type of posting you're sending
- limitations imposed by the mailer
- the weight of the items
- the bundling method

Bag or tray breaks

Each selection, whether Low Sort or High Sort, will require one or more bag or tray labels depending on how many bags or trays you use. This has to be built into the handling system.

Where postings are large or items are heavy, a selection will require more than one bag, tray or bundle. Tray weights are a fixed figure (1kg) but since the weight of a bag is not a totally fixed figure, marking bag breaks on labels is not as vital as marking selection breaks on items, as long as each bag is no heavier than 11kg or each tray no heavier than 10kg. However, applying bag or tray breaks can help maximise efficiency.

Special Selection Codes

We have set aside a range of numbers to help you handle items which are not being posted as one of our pre-sorted products. The numbers are in the range 00000 – 09999, and codes begin 999. These will not be used as Royal Mail Selections, and have been set aside for your own coding purposes. Such items may not be included in your sorted posting.

Selection size

- there are two (2) selection levels for our High Sort options, but to qualify for the best discounts you should try to assign mail to Direct selections
- an alternative to Direct selections is to sort to Residue selections, which you should do if you can't reach the required number of items for a Direct selection, either if the address details are incomplete, or time and resources are a constraint

The sorted plan contains eighty six (86) Residue selections. These consist of a group of adjacent Direct selection areas; items that do not carry a postcode printed as part of the address (but can be given a Residue code via the Post Town or the outward part of the postcode), or where the number of items for a Direct selection is below the minimum must be sorted into a Residue selection bag. Minimum selection sizes

There are two (2) selection levels you need to consider

1. Direct Selections – affects your level of discount
2. Average number of items across all selections being mailed to – affects the presentation options you have (trays or bags)

Direct selections

A software program does not only order by SSC, but also determines whether there are enough items to justify a Direct. There is no minimum number of items for either Residue selections forming part of a High Sort posting or for Low Sort selections where mail is posted in bags, but for a selection to be classed as a Direct for High Sort options, the minimum quantities required for Advertising Mail, Publishing Mail, Business Mail 1st Class or Business Mail are as follows:

- letters – 50 items
- large Letters – 10 items

Average number of items across all selections being mailed to

For Low Sort options (our pre-sorted machine-readable or Low Sort Manual options) there is only a single set of selections to sort to, and there is therefore no minimum number of items per selection. For High Sort options you can sort up to 1529 ways.

If you wish to use trays for either Low Sort or High Sort options, you must ensure that you meet the following minimum average no of items per selection across the entire mailing:

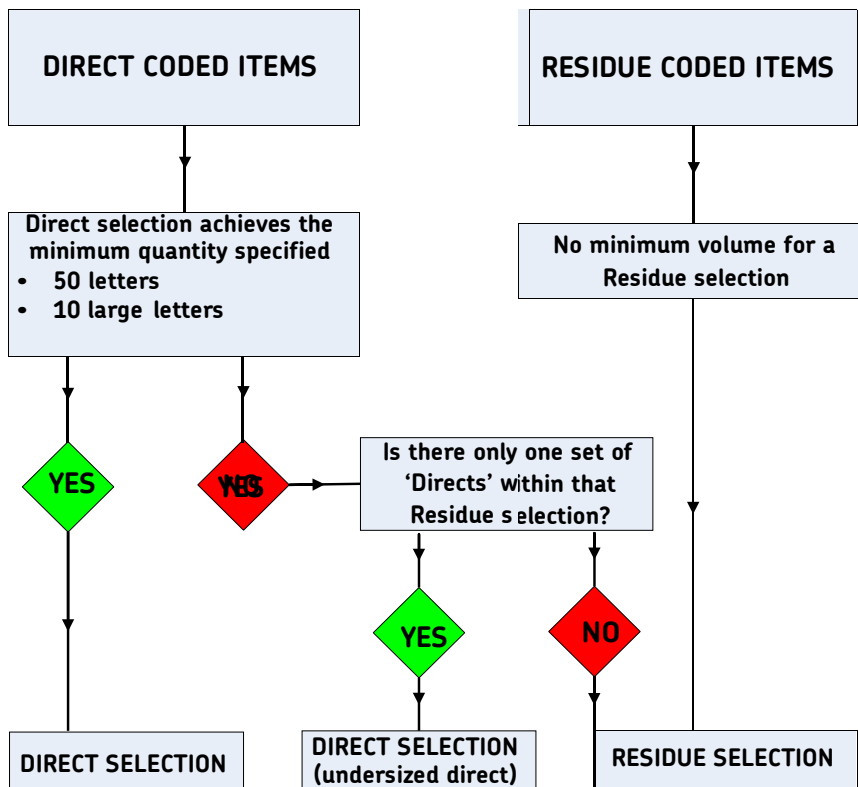
- 100 letters, or 25 large letters

Please note:

This 'average number of items' requirement does not apply when using bags or the segregated bundles option.

- You may choose to increase the minimum selection volumes noted above and this is recommended in order to maximise bag/tray fills and reduce the number of labels printed and bags/trays used)
- When sending mixed weight postings containing letters, large letters the minimum Direct selection size will depend on what format the items are being billed at and the percentage of large letters in the posting. If letters form the greater percentage, then the Direct selection minimum is fifty (50) items. If it is large letters it is ten (10) make up the bigger percentage, it is five (5) items. Items not meeting the minimum volume requirements of a Direct selection must be brought together under the appropriate Residue selection

6.2 Sorting into Direct or Residue selections



The following example demonstrates how sorting to Direct and Residue selections works in practice. Please note that this example is for illustrative purposes only.

Selection code	Items (Letters)	Bags
12348	52	Direct
12349	10	Residue 123
12351	50	Direct
12352	20	Residue 123
12353	60	Direct

The exception to this sortation is known as the 'Undersized Directs' rule, as set out below.

6.3 Undersized Directs (optional)

The use of Undersized Directs will maximise the amount of discount available to you for a posting. But this method is more complicated and may increase the processing time of your posting.

Please note:

Undersized Directs are not permitted with Low Sort or no sortation postings.

The Undersized Directs principle is that if a Residue bag or tray contains mail for only one Direct selection and no others, then the items can be sent as a Direct selection bag/tray and obtain Direct selection discounts, regardless of the number of items in the bag/tray and even where the volume is below the minimum selection volume for a Direct selection. This is acceptable because additional information regarding the contents of the bag/tray is provided (in the form of Direct bag/tray label text), and no additional bags/trays of mail are created.

Please note:

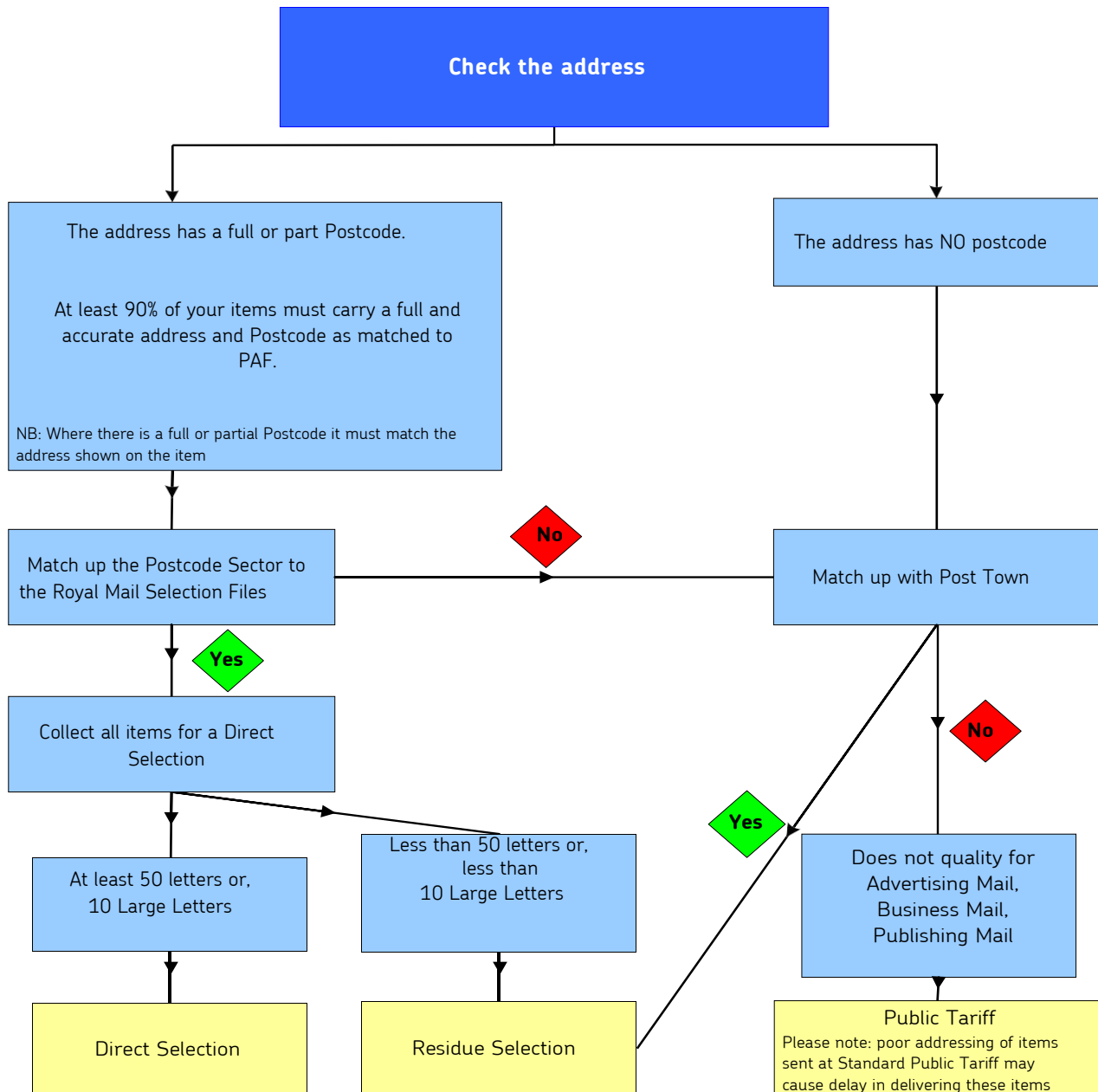
Only one Undersized Direct may be sent per Residue selection, i.e. if a Residue selection in a posting has items in it from two or more Direct Selections, then Undersized Directs cannot be used.

The following example (for letters) illustrates the Undersized Directs principle:

Selection Code	Items (letters)	Bags
12348	53	Direct
12349	50	Direct
12351	56	Direct
12352	20	Residue
123	0	No residue coded mail

In this example, the total number of selections with no Undersized Directs would be three Direct selections and one Residue selection – making a total of four selections. However, if the Undersized Directs rule is implemented, the mail for 12352 becomes a Direct selection because there is no residue mail for any other SSCs within the 123 code, thus giving five Direct and no Residue selections. The Undersized Directs principle can apply equally to letter, large letter postings.

6.4 Dividing your posting into Direct and Residue selections (High Sort options)



Flexibility in number of selections for High Sort product options

With High Sort options you can choose to sort to only a proportion of available selections. How you make this choice largely depends on whether you think the benefits of handling fewer Direct selections outweigh the greater discounts you would earn for sorting to a higher number of Direct selections.

Please note:

- Not all Direct selections may be utilised on every posting. However, the larger the volume of the posting, the more Direct selections there will be. Also with geographically concentrated postings, a higher percentage of the posting will go into Direct selections, even though there will be fewer Direct selections altogether you can sort your posting using a selection of Direct and Residue selections based specifically on your own needs. This will enable you to maximise the amount of discount you earn.
- If you are sorting manually it is important you attempt the right number of selections and those that are best suited to your needs. If you need help with this process, call the Royal Mail Technical Helpline on **020 7371 6957** or ask your account manager

7. The Royal Mail Selection Files structure

The Royal Mail Selection Files contains the list of postcode-defined selections which provided a series of programmes. All files contain UPPERCASE characters only following addressing convention for Post Towns and postcodes – it is important to bear this in mind when performing comparisons.

7.1 Composition of the Royal Mail Selection Files

Record Type	Category	Files	Comments
0 1	postcode district postcode sector	SORTA.DAT	Major index to Royal Mail Selection Files (postcode lookup table)
2 3	Direct Selections Mail Centre Residue selections	SORTB.DAT MECHB.DAT	Direct/Reside & Mail Centre selections. line listing text and geographical sequencing details making up the MS Selection Files.
4	Post Town index	SORTC.DAT SORTD.DAT	Index for non-postcoded addresses
5 6	Geographic Areas & Mail Centre/Residue relationships		Geographic area definitions

Please note: there are currently no record type '0's in SORTA.DAT or Record type '2' in MECHB. We may however, revert to the use of record type '0's in the future.

The 7 record types within the Selection Files are contained in 4 files.

Record size for each file is as follows:

- SORTA.DAT – Record size 11 bytes
- SORTB.DAT – Record size 86 bytes
- MECHB.DAT – Record size 86 bytes
- SORTC.DAT – Record size 14 bytes
- SORTD.DAT – Record size 52 bytes

SORTA.DAT file provides the major mechanism for address matching. It contains all postcode district and required sector records with their corresponding Direct selection codes. The districts and sectors do not represent selections in themselves, but are kept as separate record types, as a system will first attempt to match the district, then the sector. All records in SORTA.DAT have been sector based, although we may revert to district based records in the future.

Record type 1 (postcode sector) structure

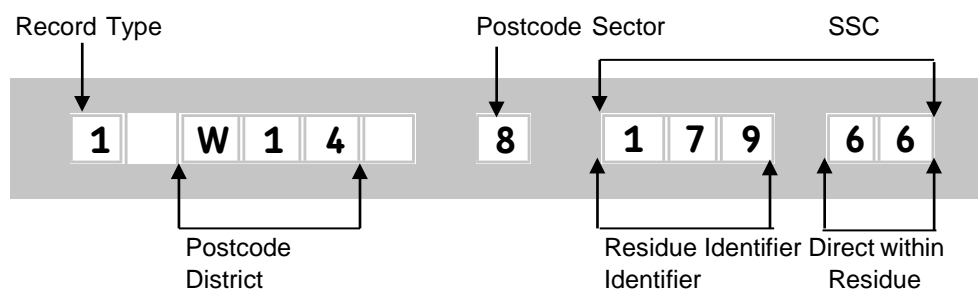
The postcode sector is the first character of the inward part of a postcode. For example, in the postcode CF6 9DX, the sector is represented by the figure 9. Records contain both the district and sector.

A postcode sector record is broken down in a similar way to a postcode district record. The only difference is the inclusion of the sector:

Example of postcode sector record:

Field	Size	Type	Comments
Record type	1	Numeric	Always 1 to indicate postcode sector
postcode district	4	Alphanumeric	UPPERCASE only
postcode sector	1	Numeric	Sector number
Standard Selection Code	5	Numeric	Unique identifier Direct selection

Here is a typical record:



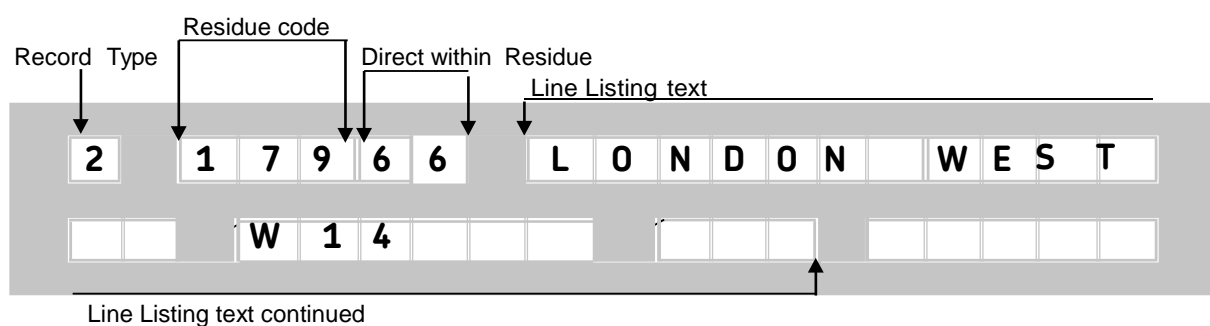
Record type 2 (Direct selection) structure

The Direct selection records contain the bag label text for each Direct selection.

Example of Direct selection record:

Field	Size	Type	Comments
Record type	1	Numeric	Always 2 to indicate Direct Selection
Standard Selection Code	5	Numeric	Unique identifier Direct Selection
Label	75	Alphanumeric	line listing text for this Direct Selection, including Direct Selection name and postcode group
Filter	5	Blank	Spaces, filler to make record length the same as type 3

Here is a typical record:



Please note:

These records must not be used for matching postcodes to Direct selections. The SORTA.DAT file must be used for this.

Record type 3 (Residue and Low Sort) structures

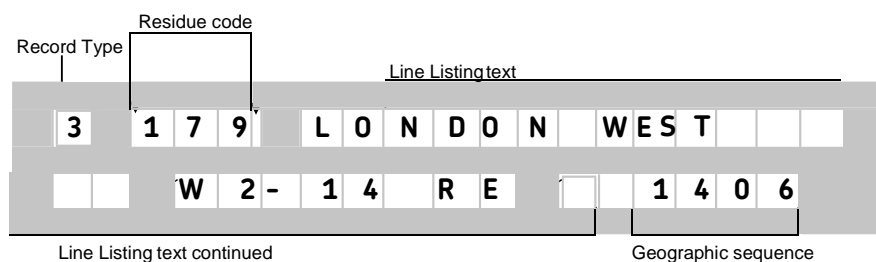
Records contain the line listing text for each Residue and Low Sort selection.

Example of a Selection record:

Field	Size	Type	Comments
Record type	1	Numeric	Always 3 to indicate Residue Selection
Standard Selection Code	3	Numeric	Unique identifier Residue Selection
Label	50	Alphanumeric	line listing text for this Selection, including Selection name and postcode group
Geographic Sequence	32	Numeric for postings	16 two bytes sequenced indicating order

The last field enables you to make decisions about posting 1st Class mailings in a sequence compatible with latest posting times.

A typical record would look like this:



Sequencing 1st Class mail is useful should you have a number of collections spread throughout the day. But in all instances, you must ensure that your mail is ready for collection by the latest acceptance time for your postcode area. Sequencing is described in more detail in the section on Geographic order of posting later in this chapter.

Record type 4 (Post Town) structure

Type 4 records contain Post Towns within the UK. They are used if an address does not have a valid postcode.

They contain the first ten characters of a Post Town. The file does not contain references to Post Town names duplicated within the UK (e.g. Newport), or Post Town names where the first ten characters are duplicated, as these could not be uniquely linked to a Residue selection.

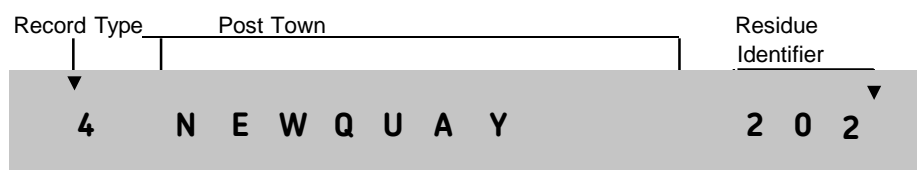
To make matching records easier, all Post Towns appear in alphabetical order, and are in UPPERCASE only in line with addressing convention. If you have addresses containing Post Towns in lower case characters, you may have to convert that line of address text to uppercase in order to make comparisons. Towns whose names include punctuation (e.g. Stratford-upon-Avon or St. Albans) have been included both with and without punctuation, to make matching easier.

If addresses do not carry sufficient postcode information to match them to a Direct selection, they can only be matched to Residue selections (record type 4).

Example of Post Town record:

Field	Size	Type	Comments
Record type	1	Numeric	Always 4 to indicate Residue Selection
Post Town	10	Alpha	First 10 characters of Post Town
Residue Code	3	Numeric	Unique identifier Residue selection

A typical record would look like this:



Record type 5 (geographic area) structure

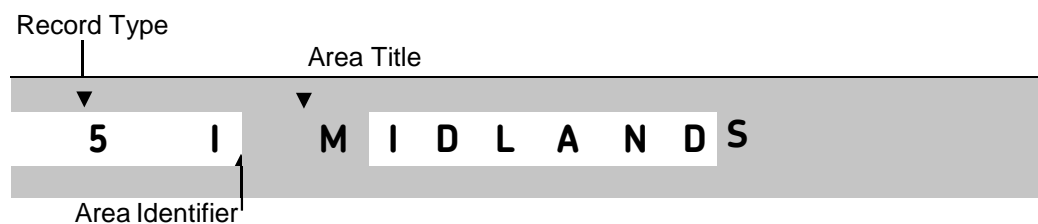
Geographic areas are used to define the order in which 1st Class mailings should be posted.

Type 5 records contain details of these geographic areas. Each record contains the area identifier – made up of a single alphabetic character, and the title of the area.

Example of a Geographic Area record:

Field	Max Size	Type	Comments
Record type	1	Numeric	Always 5 to indicate Residue Selection
Area identified	1	Alpha	Geographic area identifier
Area Title	50	Alpha	Geographic area title

A typical record would look like this:



Record

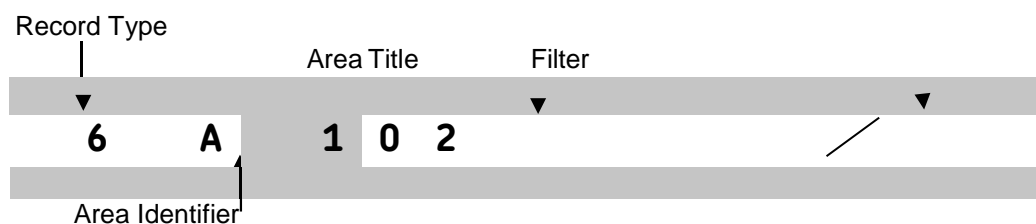
Record type 6 (Residues and mail centre for Low Sort) structure

Geographic areas encompass several Residue areas each. The relationship between Residue and Mail Centre areas is given in type 6 records.

Example of Geographic Area/Residue record:

Field	Max Size	Type	Comments
Record type	1	Numeric	Always 6 to indicate geographic area / Mail Centre or Residue relationship
Area identified	1	Alpha	Geographic area identifier
Mail Centre Residue Identifier	3	Numeric	Selection identifier
Filler	47	Blank	Spaces, filler to make record length the same as type 5

A typical record would look like this:



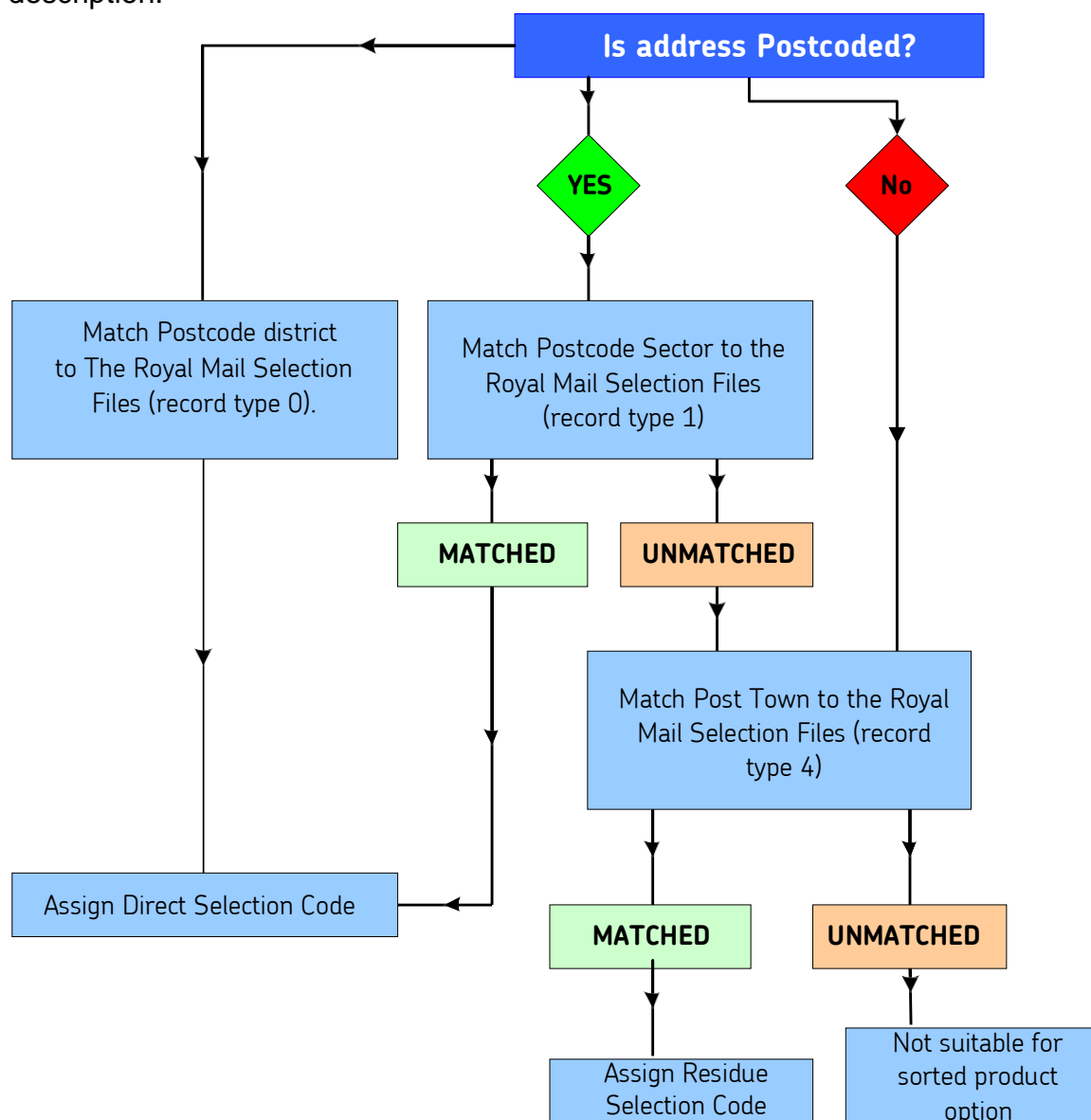
8. How Standard Selection Codes are allocated

Methodology

Although the methods outlined here for SSC allocation are by no means the only ones, there are two main methods to allocate codes to your mailing lists:

1. creating a temporary address file, with the associated SSC as additional information to each address record
2. extending the original mailing list to enable the storage of the SSC for each address

Once the appropriate method has been chosen, the allocation process is the same. This diagram illustrates the general logic flow, and it is followed by a more detailed description.



Please note:

It is important to note that, for the purpose of describing this process, postcoded means an address with a full and accurate postcode at least down to the postcode sector, as this is required for an item to achieve Direct selection status.

If the address is postcoded, the first step is to check whether the postcode sector portion of the postcode exists in the SORTA file. Record types 0, which represent postcode districts completely encompassed by one SSC, are not currently used, although they may be re-introduced at some stage in the future.

The postcode sector from the address record should be checked against the type 1 records in the SORTA file. For example, the figure below indicates that postcode sector LL14 1 addresses have an SSC of 12775.

This example is for illustrative purposes only:

1 L L 1 4 6 1 2 7 7 5

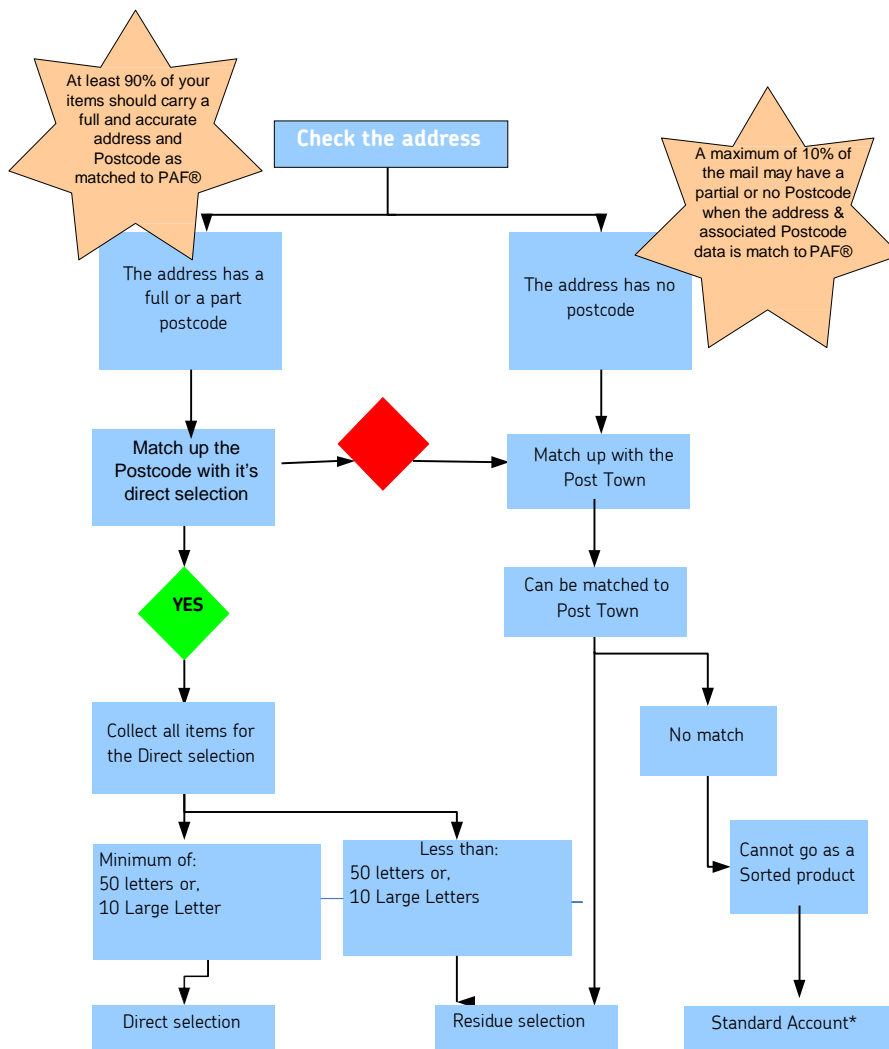
Please note:

- If type 0 records were to be re-introduced in the future, care would need to be taken when matching against both record types 0 and 1. Postcode districts can have between two and four characters. However, the address file may hold the postcode in a single field, and have a variable number of spaces between the sections of the postcode
- If no match is found, either the postcode does not exist or it is invalid. In this case the address itself needs to be checked against the list of Post Towns, which is contained in SORTC Record Type 4. If a Post Town match is found, the address will be allocated a Residue Code. This will then enable items for that address to be sent using one of our sorted products (, but they will only achieve a Residue discount. To maximise your discounts you should improve the level of postcode accuracy within your address list records without postcodes should be matched only to Post Towns. There is no provision for matching them to counties
- To check the address against SORTC, the Post Town will need to be extracted from the address text and (if the matching process is case sensitive) converted to upper case, if this has not already been done. The Post Town should be found in the last two lines of the address (excluding the postcode), with precedence given to the last line to avoid the possibility of matching a locality to SORTC
- If the first ten characters of the Post Town match a record in SORTC, then the associated Residue Code (High Sort) for that record is allocated to the address

0 B O L T O N

1 2 4

- Any non-postcoded items with BOLTON as the Post Town would be allocated 124 as a residue code
- The SORTC file – used for matching Post Towns to Residues – does not contain town names of which the first ten characters are duplicated within Great Britain. For example, Newport is a town that occurs more than once in the UK.
- It does not appear in the SORTC file because it cannot be uniquely identified to one SCC



9. Sortation – implementing the Royal Mail Selection Filesortation criteria

9.1 Sortation methods

There are a number of methods by which the Royal Mail Selection File sortation criteria can be implemented. 2 of these are outlined in paragraph of this section of the user guide.

Tagging

Tagging requires each address record to be tagged to indicate if it is a Direct or Residue. One way to achieve this is to add an extra character to all SSCs. This will identify Residue and Direct selections, enabling addresses for a Direct selection to change to a Residue selection, without changing the assigned SSCs when there are not enough items to meet the minimum Direct selection size.

Example:

1	2	7	7	5
---	---	---	---	---

COULD BE MODIFIED TO GIVE:

1	2	7	7	5	0
---	---	---	---	---	---

OR

1	2	7	7	5	1
---	---	---	---	---	---

WHERE '1' INDICATES A RESIDUE SELECTION

Please note:

If an address is Residue coded by matching Post Town (using SORTC) then, to keep a consistent representation of the selection code, two zeros may be added after the three digit Residue code.

The sortation process using tagged records can be broken down as follows:

1	2	7	7	5	1
---	---	---	---	---	---

RESIDUE CODED ONLY

WHERE '1' INDICATES A RESIDUE SELECTION

- To simplify the tagging process, we recommend that the address list is first sorted by SSC
- The count of records per SSC will be required to enable implementation of the sortation criteria, as well as the reporting described in the production stage below
- When a Direct selection is tagged as a Residue selection, because it does not contain sufficient items to form a Direct bag, the counts for both the Direct and its associated Residue selection need to be updated
- Once all the Direct and Residue selections have been decided, then the list should be sorted. There are a variety of possible sorting sequences

Using the SORTB file

Another method of performing your High Sort is to hold a list of all Direct selection codes, derived from the SORTB file, and include a mailing list item count for each SSC. As each record is processed, the count is updated against the appropriate SSC in the list.

- Once the table of SSC item counts has been completed, Royal Mail Selection File sortation criteria are applied to the table, rather than to the address file. This should greatly reduce the processing required for this phase
- As these criteria are applied, any Direct selections that are assigned to Residue must have their count updated
- The reassigned Direct Selection Code should indicate 'zero items' and the associated Residue Selection Code the additional items
- When the table has been processed, it will require sorting according to the sequence required. Once the table is sorted into the order for production, then the address list must be sorted to match the table's new order

Sortation parameters

All sortation systems require specific parameters to enable correct sorting, and for reports to be produced.

Even if you run a stable environment, where the profile of your posting rarely changes, we recommend that you use parameters, wherever possible.

Parameters to consider:

Minimum selection size	<ul style="list-style-type: none"> ➤ letters – fifty (50) items ➤ large letters – ten (10) items <p>If you wish to post using trays (letters or large letters only for High and Low Sort) you need an average of at least 100 letters or 25 large letters across all the selections being mailed to (note: this is an average across the entire posting. You do not need to have one hundred (100) letters/ twenty five (25) large letters in every selection)</p>
Maximum bag weight	<p>Maximum - 11kg</p> <p>You must fill a bag for each selection before commencing filling another bag for that selection, and you must also ensure that each individual bag weight does not exceed 11kg</p>
Maximum tray weight	<p>Maximum – 10kg</p> <p>You must fill a tray for each selection before starting to fill another tray for that selection</p>
Maximum bundle weight (for segregated bundle postings only)	<p>Maximum – 6.4kg</p>
Item weight	<p>The actual accurate weight and format of the item is needed to calculate the price of your posting, estimate the number of bags or trays required and generate labels for each selection</p>
Delivery speed (1 st Class, 2 nd Class, Economy or deferred Economy)	<p>Delivery speed must be printed on bag or tray labels and planning reports. We need to know which delivery speed it is in order to calculate the item cost and the discount we can give you for your posting</p>
Geographic region of posting	<p>This specifies from which area of the country your posting will be made. It is also used to determine the correct geographic sequence to be used for 1st Class or very large postings</p>
Job reference number	<p>This is a customer generated reference number which is unique to each and every posting, which must be consistent across all documentation for each posting of that mailing</p>
eManifest details	<p>The eManifest handling System (eMHS) will provide an eManifest ID that must be can be integrated into the sortation process</p>

9.2 Sortation sequencing

There are a number of different sequences that can be used for ordering of output. The three main sequences used are:

1. SSC order, with all Directs preceding all Residues
2. SSC order, with Directs followed by their related Residue
3. Geographic order, with Directs followed by their related Residues within each geographic area, or all Residues produced first followed by the Directs in geographic sequence. Geographic sequencing is recommended for 1st Class mail where you have a number of collections during the course of the day

SEQUENCE 1	SEQUENCE 2	SEQUENCE 3
12234	12234	12236
12235	12235	12237
12236	12236	12234
12237	12237	12235
12348	122	122
12349	12348	12348
12351	12349	12349
12352	12351	12352
12353	12352	12353
*	12353	12366
12366	*	*
12533	12366	12351
*	123	123
12403	12401	12401
*	12402	12402
12532	12403	12403
12533	*	*
*	124	124
122	12532	12532
123	12533	12533
124	*	*
125	125	125

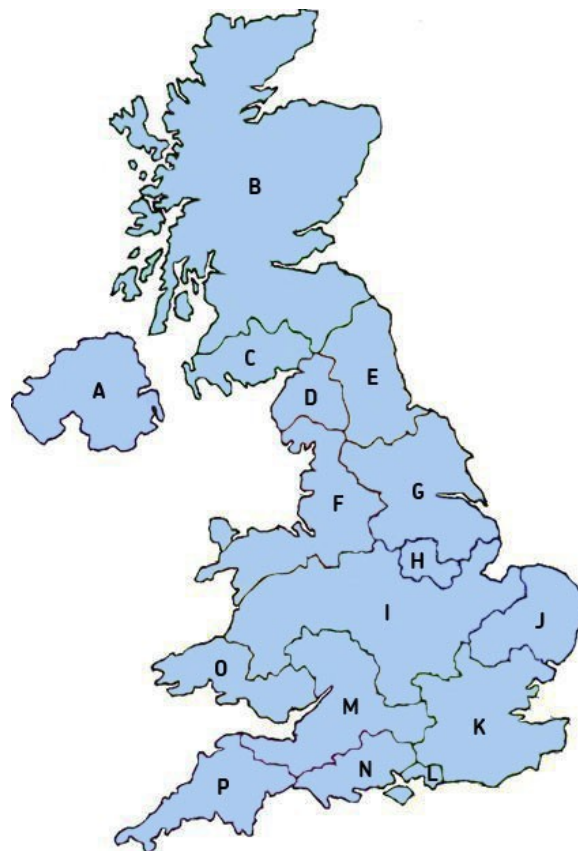
10. Geographic order of posting

When posting 1st Class mail you must produce and present your mail by our latest acceptance time and we recommend that you present the mail in the preferred order of posting. This reflects the distance which mail has to travel. This will ensure that when a 1st Class mailing is posted across multiple collections we receive first the mail which has furthest to go. Therefore, if you're posting from area B (Scotland), you must send out items for area J (East Anglia) first, followed by areas I (Midlands) and H (Nottingham).

Despite the fact that geographic sequencing of post is primarily designed for 1st Class mailings, there is no reason why it should not be used for other geographic sequencing enables mail travelling further to be processed first, therefore improving the overall quality of service. Presenting mail in geographic sequence may also enable you to benefit from enhanced latest posting times (see the 'Collections' section of this user guide).

For the purposes of geographic sequencing of mailings, the UK has been divided into a number of regions, labelled A to P, as shown in the following map:

Examples of UK Geographic Area Classification Codes



Please note:

Areas C and D are combined

With geographic sequencing, the country is split into a sixteen area grid, each assigned a letter between A and P. Through this grid we specify the areas which take the longest to reach (and are therefore posted first), and those which can be reached fastest (and are therefore posted last). These sequences can be found in this Chapter or in the SORTB file.

To obtain the required posting sequence you will need to first determine from which geographic area the mailing is to be made. This can be achieved via the table in the Royal Mail Selection Files booklet (using the postcode of the mailing location) or the SORTD file contained within the Royal Mail Selection Files. The postcode will specify the postcode area that needs to be referenced in the tables. Alternatively, the postcode will enable the related Residue Code to be extracted. And by using the Residue Code, the geographic area to which it belongs can be extracted from the SORTD file.

Applying a geographic sequence with the Royal Mail Selection Files requires access to the last 32 characters of the type 3 records in SORTB. These represent 16 two-digit numeric codes, each code representing a geographic area from which the posting is to be made. So, if you're posting from area D, you would need columns 7–8, representing the fourth two-digit code.

The records in SORTB represent a table of geographic sequences as below. For each Residue area, the mailing sequence is given by geographic area.

Please note:

The Residue codes for each region are available from:

- the SORTD.DAT file of the Royal Mail Selection Files, or
- the Selection Files booklet

A priority table is also included in the Royal Mail Selection Files, and indexes to each of the Residue and Low Sort selections can be found at the end of the SORTB/MECHB files. This enables you to decide in which order to post a mailing from a particular region. The table below gives an example of this information and shows you how to arrange the posting from each of the regions.

If you are posting from a postcode in the North West England (e.g. BL). using the table of geographic regions in SORTD.DAT, place BL in region F (North West England). Reading down that column in the table below, you would post to area B (Scotland) first, region M (South West England) next, and so on, until region F (North West England) which you would post last.

Geographic sequencing is useful for any large mailings produced and posted over a number of days.

To find the order of posting*:

- determine from which geographic region (A – P) you are posting
- search along the top of the table for the letter of the region you are posting from.
- read down that column to find the order of posting for the 16 regions

Royal Mail Selection Files geographic order of priority:

ORDER OF POSTING																
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1 st	I	J	J	B	B	B	B	B	B	B	A	A	B	B	B	B
2 nd	M	I	I	M	L	M	A	N	N	N	B	B	A	A	A	A
3 rd	E	H	H	P	N	P	L	I	I	I	E	E	K	K	K	K
4 th	G	A	A	O	P	O	K	J	J	J	G	G	L	L	L	L
5 th	H	E	E	N	O	N	P	M	M	M	C	C	E	E	E	E
6 th	F	K	K	K	I	K	O	K	K	K	D	D	H	H	H	H
7 th	P	L	L	L	H	L	N	G	G	G	F	F	G	G	G	G
8 th	N	F	F	A	C	A	M	F	F	F	K	K	J	J	J	J
9 th	O	O	O	I	D	I	J	P	P	P	I	I	I	I	I	I
10 th	L	G	G	J	J	J	C	C	C	C	J	J	C	C	C	C
11 th	B	M	M	H	K	H	D	D	D	D	P	P	D	D	D	D
12 th	C	N	N	E	M	E	F	E	E	E	M	M	F	F	F	F
13 th	D	P	P	G	F	G	I	O	O	O	H	H	N	N	N	N
14 th	K	D	D	C	G	C	G	H	H	H	N	N	O	O	O	O
15 th	J	C	C	D	A	D	E	A	A	A	L	L	M	M	M	M
16 th	A	B	B	F	E	F	H	L	L	L	O	O	P	P	P	P

*Areas and area codes are for illustrative purposes only and subject to change with each new release of the Royal Mail Selection Files.

10.1 Channel Islands and Isle of Man

Despite the fact these areas do not fall under the Royal Mail postcode system, they are still included within the Royal Mail Selection Files.

Please note:

- Isle of Man postcodes IM1–9
- Jersey postcodes JE1–5
- Guernsey (including Alderney and Sark) postcodes GY1–9 has its own Direct selection

11. Preparing your items

For full details on how to prepare and present your items please refer to the Containerisation User Guide available at www.royalmailtechnical.com

12. High Sort items

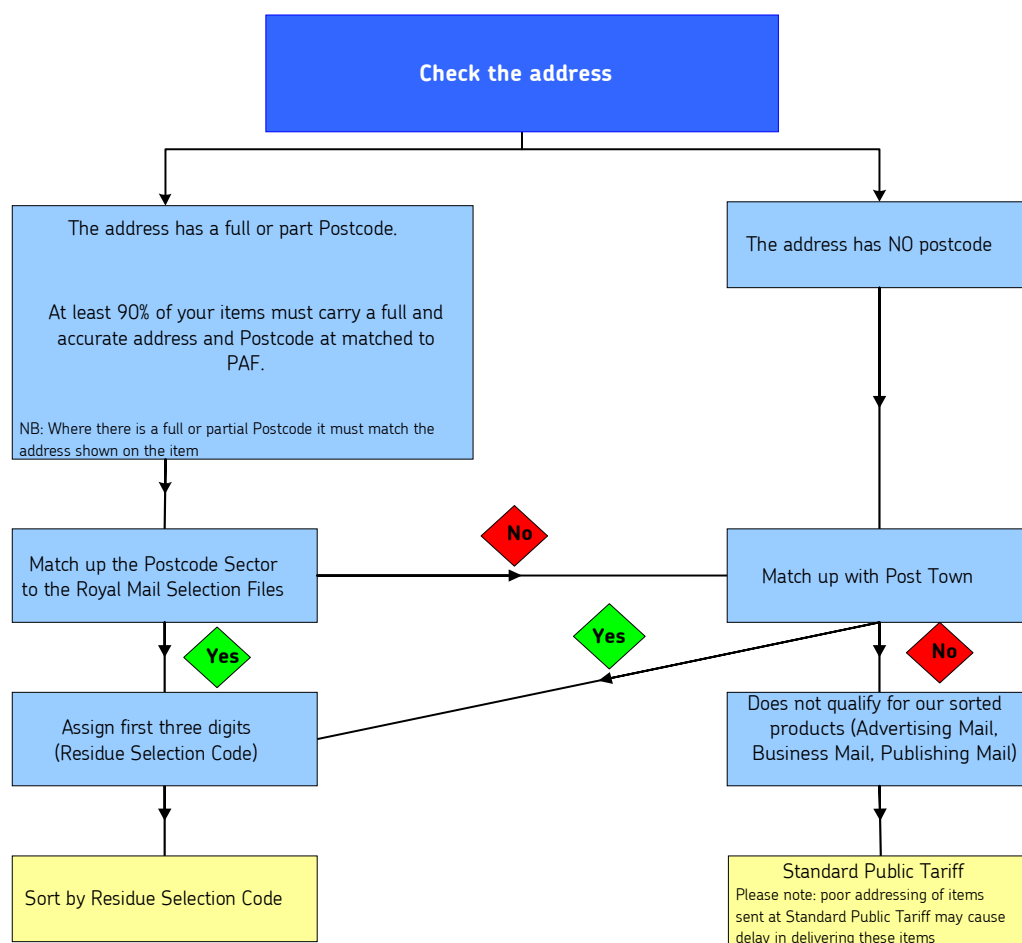
The High Sort option is for you if you wish to sort your mail:

- up to 1,529 ways for Direct selections
- up to as many 86 ways for Residue selections that you have items bound for

12.1 Entry criteria:

- you cannot mix Directs and Residues in the same bag or tray
- you can only have one set of Directs or Residues per posting
- you must maximise the bag or tray for each selection
- you cannot mix delivery speeds within the same posting

How to sort your posting into High Sort Residue selections



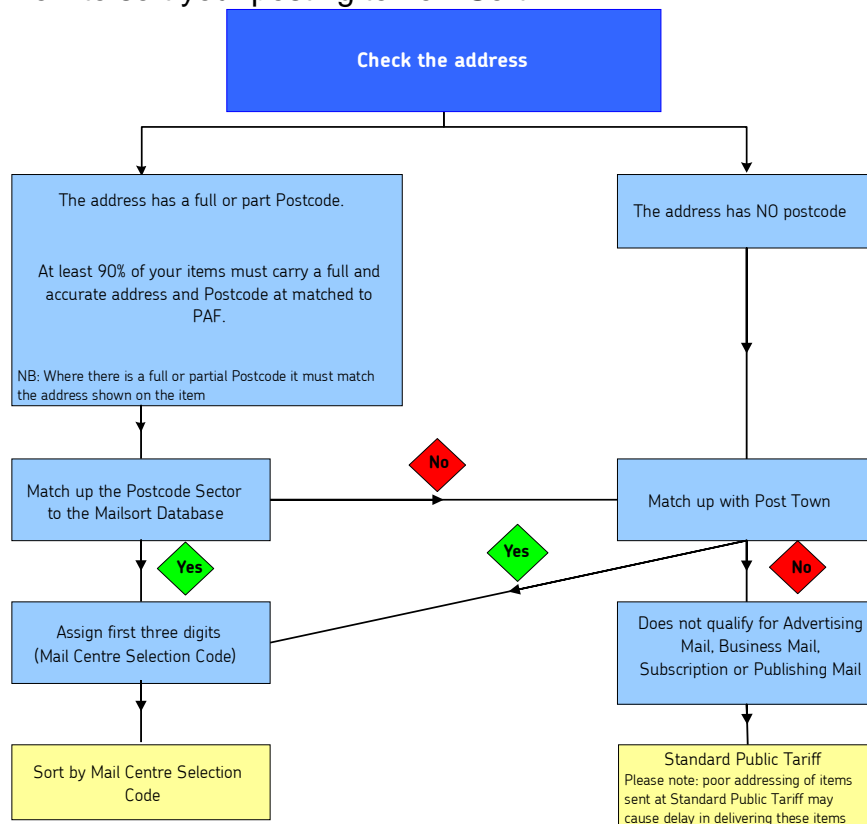
13. Low Sort items

This option is for you if you have chosen to make your mail machine-readable or manual and wish to sort your mail up to 86 ways. The 86 selections are effectively the same postcode groupings as those for High Sort Residue but the information on the labels will have different elements.

13.1 Entry criteria

- you cannot mix selections in the same bag, tray or ALP
- you can only have one set selections per posting
- you must maximise the bag or tray for each selection
- you cannot mix delivery speeds within the same posting
- you cannot mix different Mailmark variants within a Batch – they must all be of the same class, format, sortation and machine-readability option.

How to sort your posting to Low Sort



14. No sortation

No sortation options are for you if you do not want to sort your mail. All you have to do is make sure the addresses on your letters are up-to-date and can be read and we will do the rest. You are not required to undertake any sorting for the no sortation mail options.

15. Manual sorting

15.1 When manual sorting should be considered

There are circumstances where computer sorting might not be possible and sorting manually might be a viable alternative.

Manual sorting is worth considering:

- where items exceed 100g in weight. The combination of the discount and the item price from which to subtract the discount can make manual sorting a viable option. For example, small 'local' postings
- where selections from different cells or postings are combined within a High Sort posting to generate a higher proportion of Direct selections, which can earn you a higher level of discount

Points to consider

- Sorting manually to more than 300 selections may increase the level of discount you can earn, but it will also take longer to prepare
- If you are sending around 20,000 letters or 4,000 large letters, sorting to the National 300 may give much the same result in numbers of Direct selections as would sorting to the full range of Direct selections. This assumes that your posting has an even delivery spread across the UK
- Anyone mailing more than about 35,000 letters or 7,000 large letters should sort to the full list of selections if at all possible
- Before choosing one of the posting options, you should also consider the space you have at your disposal for sorting. For example, it may not be practical to use more than 300 selections if you do not have the space to handle them, as even if you split the mailing across the same frames, it will make the sort more complex and probably slow it down
- If you wish, you can opt to sort to Residue selections only. This may make manual sorting more viable although you will not receive any Direct selection discounts and not all products attract VRDs on either the Directs or the Residues

Extra costs

There are extra costs involved in manual sorting compared to computer sorting.

- When posting to High Sort selections, checking weights and numbers of Direct and Residue selections is labour intensive and can significantly add to the extra costs of processing a mailing
- Manual sorting of letter, large letters may not be viable because of the cost and space requirements of setting up such an operation

15.2 Number of selections

National sorting plans

We have created a series of National sorting plans designed to help people who have chosen to sort to a smaller number of selections. These plans comprise of all of the Residue selections (currently eighty six (86)) in the Database with the most heavily used Direct selections. If the National plans do not match your mailing profiles you may compile your own selections using all the Residue selections and your most heavily used Direct selections. Three hundred (300) selections is normally an appropriate amount and the National three hundred (300) meets this requirement. For information on the National 300, other National plans or for help in devising your own set, please call the Royal Mail Technical Helpline on **0207 371 6957**.

Low Sort

If you have a Low Sort option which you wish to manually sort to, the number of selections are the number of selections in the Royal Mail Selection files. And they are the same postcode areas as those of the Residue selection element for High Sort postings. Therefore, should you wish to manually sort a Low Sort option please only follow the guide where Residues are mentioned, as the principle of sorting is the same.

Manual sorting is permitted for Mailmark postings provided that the correct selections are sorted to, an eManifest can be successfully uploaded, and Mailmark Barcodes can be correctly created.

Frame layouts

To help you prepare your manual sort, we can provide you with a list of the 300 standard National Selections based on the number of delivery points per Direct selection. We can also provide you with a list of Direct selections based on your actual mailing list so it is more appropriate to your requirements.

Please note that the software we use to generate selections is based on a model that assumes a nationally spread posting to calculate the optimum layout for sort frames.

The process for creating these selections is based on a model. This may mean it is not necessarily the most suitable for your needs, so before you decide on the frame layout to use, please read this section to see if the National Selections frame layouts are suitable.

- If not suitable, please discuss the other frame layouts available with your account manager or call the Royal Mail Technical Helpline on; **0207 371 6957**
- If none of these are suitable, we can also provide you with a customised list of Direct selections. For more details, contact the Royal Mail Technical Helpline on **020 7371 6957**
- If you ask for a customised list of Direct selections, we can also give you an estimate for the level of discount you might earn using those layouts, this may vary depending on the product option and service chosen.

15.3 Sorting frames

Once we have details of your mailing list, we can provide you with the list of Direct selections designed specifically for the area corresponding to your posting. We can help you optimise the layouts of your sorting frames by determining which of those should be primary frames and which should be secondary frames. The number of frames will depend on the number of selections you want to attempt and available space.

Primary frames are designed to deal with as many of the major Direct selections as possible, thereby reducing the amount of re-sorting on subsequent frames as well as handling costs. All the frames are arranged in such a way to make finding the correct box as easy as possible. Normally, with this sort of design there should be no need for you to ask us to come up with a special frame layout for you. However, if this is the case, please discuss this with your account manager.

Choosing sort frames

Sort frames are an important part of manual sorting, as are choosing the right type of frame and locating it in a suitable area. A frame might take the form of conventional pigeonholes, or else frame-mounted drop-bags, or perhaps some other system. It all depends on what you need to sort. The most important criterion, though, is that you choose the right frame for the job.

Frame size and layout

- We recommend you begin with an 8 by 6 frame, giving you a total of 48 selections per frame. Clearly, having just one of these frames will not be enough to sort to Residue selections only, so you'll need several (at least 3)
- You'll also need to set up a system of primary frames and secondary frames, as your mail will need to be sorted to Direct selections (on primary frames and secondary frames), followed by Residue selections (on secondaryframes)

Suggestion for arranging frames:

- If you only have limited space available, you can use the same frame twice, once for your primary frame sort and again for your secondary frame sort. However, where this is the case, you'll also have to find a way of changing the selection labels above each box
- Increasing the number of pigeonholes on a frame may reduce double handling, as fewer frames will be needed. If you choose a frame larger than 8 by 6, you will slow down the handling process, both because of the greater number of boxes to choose from, and the movement required to reach boxes at both edges of the frame. However, you could overcome this problem by angling your frame
- Consider the size of the box. Smaller boxes reduce the distance an operator needs to stretch, but at the same time, they will need to be emptied more frequently. Normally, we suggest each box measures 27cm deep by 18cm wide by 15cm high
- The type of item being posted may also dictate the shape of the frame box. For example, if your items are mostly letters, a standard box will be fine. However, large letters would need something wider, you may find it easier to use drop-bags
- If you decide to use drop-bags, you might find the most convenient layout to be in an H shape. This enables it to be used by two people (one either side) or more

Additional tips:

- If you fill a box on a frame, remove the mail in that box as a bundle. Please remember that all bundles must be faced and the items securely banded together
- When you come to the end of a frame, put any Direct selections left in the frame with other similar bundles, but ensure that you do not mix selections
- Any Direct selections that have not met a minimum of fifty letters, ten large letters will have to be bundled as Residues. To save time later, it might be easier to mark these with a specific frame box reference, so that when you come to combine these selections into a Residue, you can do so quickly by selecting only those not marked as having already produced a Direct selection

15.4 Labelling methods

There are 4 methods used in labelling frames. Methods 1 and 2 are more commonly used, though methods 3 and 4 may be helpful for more frame layouts.

Method 1

Alphabetically by Selection Name – for example, Aberdeen at the top left and York at bottom right. Where you have several boxes for the same town (but with different postcodes), these can be sequenced by alphanumeric postcode.

Method 2

Alphanumerically by postcode – for example, AB10 in the top left, ZE3 at the bottom.

Method 3

Numerically by SSC – this requires the codes to appear on each item to be sorted. This method is normally used when selections are being combined and re-sorted to earn more discount. Sorting a general mailing purely by SSC may be more difficult. On the other hand, sorting by numbers requires less training or geographic knowledge.

Method 4

Ergonomically – for highly trained sorters who are thoroughly acquainted with their frames and are using them regularly. For this method, labelling of the frames is made spirally with the most frequently used box in the centre of the frame, and the least frequently used at the edges.

Please note:

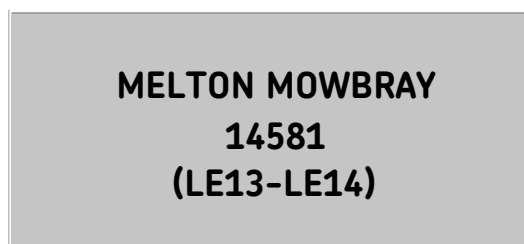
For methods 1, 2 and 3, you can choose from either a 'snaking' sequence or a 'left to right' sequence. With 'snaking', the sequence will start from top left, proceed to top right, then drop down to the next row, and proceed in reverse order – i.e. right to left – until the next row, where it reverts to left to right again and so on. With the 'left to right', you simply begin at the left-hand box every time you start a new row.

15.5 Frames for the National 300 Selections

The frame layouts we produce are divided up into one primary frame and a number of secondary frames. How each frame is arranged depends on the type of labelling used.

Ideally, each box on the frame layout should show the label text – as shown in the chapter about the Royal Mail Selection Files – together with the SSC.

Examples:



Examples are for illustrative purposes only.

When making up your labels, please use the Royal Mail Selection Files to obtain full postcodes. This is because the National Selections printout doesn't have enough room to list all the possible postcodes in every case.

15.6 Handling High Sort Residue selections

The position of Residue boxes can differ from frame to frame. Except in the case of unusually sized and geographically biased postings or residue only postings:

- there may be no Residue boxes on primary frames
- on alphabetically designed frames, by selection name and alphanumerically by postcode frames, they are grouped together after the Direct selections
- on ergonomically designed frames, they are normally in the centre of the frame
- on the numerically designed frame by SSC secondary frame, each Residue selection precedes the corresponding Direct selections. This is especially helpful if you are merging Residue selections from a number of postings, since they are already likely to have been partially sorted

Handling secondary boxes on primary frames

All primary frames should reserve a number of boxes for mail intended for secondary frames. These boxes should carry:

- clear and meaningful labels that immediately alert the person using the frame to what it should be used for
- names that include the first three digits of the selection codes for that box (e.g Northern Ireland and parts of Scotland – SSCs beginning 102-109)
- a list of the areas covered by each secondary frame on the side of the box. You could also obtain an outline map and put it close to the frame to show which parts of the country are sorted on which secondary frame

You should keep a miscellaneous box for any items which do not obviously match any selection, so that they can be looked at separately, or if necessary sent via Business Mail with no sorting or machine-readable options.

Direct selection boxes with the same names

There are some cases where a particular city carries more than one Direct selection, e.g. Glasgow or Coventry. In these cases, frames should have a number of adjacent boxes all bearing the city and the various postcode ranges within that city. However, you will still need to make sure that every item of mail goes into the correct box, as putting mail into the wrong box will delay it and also jeopardise any discount you receive.

If you have problems sorting to multiple boxes, another option is to group them all into one corresponding Residue selection box, effectively substituting any additional Direct selections you might want to make.

15.7 Bundling

The process of bundling is a requirement of every Advertising Mail, Publishing Mail, Subscription Mail, Business Mail 1stClass or Business Mail posting.

Even when you sort manually to drop-bag frames, you will still need to sort, tip, count and bundle – where quantity dictates – for both Direct or Residue selections.

- Empty any boxes for Direct selections as they fill. At this stage, you may want to count the contents and bundle it
- It may help your counting process if you bundle in units of 50 letters or 10 large letters, However, you will need to make sure you have a system in place for ensuring that Direct selections for a particular destination remain together
- Remember that you need to enter exact individual totals of both direct and Residue items on the confirmed sales order. It may help you to keep a running tally as you bag each direct or Residue bundle, instead of counting them all at the end
- Though the minimum Direct selection requirement for large letters is ten increasing your minimum selection size may be more appropriate to minimise handling costs

For further details on how to bundle and present your items please refer to the Containerisation User Guide.

Dealing with filled boxes and Royal Mail documentation

The way you handle boxes as they fill, as well as moving from one frame to another, will vary with the amount of space you have available and the number of frames. Here are a few tips you might find useful:

- When working on a primary frame, and one of the boxes reserved for secondary frames is full, put its contents in a container or bag for sorting onto the appropriate frame later
- When all the mail has been sorted for a particular frame, you should empty every box.

Handle any remaining Direct selections in one of two ways:

- If a direct bundle exists, or there is enough mail left to form a Direct selection, make up a direct bundle, count the items, and add it to any others you may have for that selection. You will then be able to bag that particular selection
- If there are not enough items to form a Direct selection on a primary frame, bundle the items and place them in the hopper or bag for the corresponding secondary frame. They will then form part of a Residue selection on that frame. If you're already on a secondary frame, add them to the other Residue selections
- Only after every bundle has been counted should you transfer the final totals onto the confirmed sales order. If you already know the total count for the posting, there's no need to count the Residue selections, just subtract the Direct selections from the total
- Once you know the total weight of the posting, an efficient way for you to work out the number of items in Direct and Residue selections is to weigh the Residue selections only and deduct that weight from the total to obtain the number of items in Direct selections. This system will only work, however, where all the items are the same weight and your method of weighing is very accurate

Please note:

If you sort manually, you do not need to give us a full computer planning report and line listing with your postings (except in the case of mixed weight postings). However, as a minimum you will still need to provide us with all the mandatory information stated on the full computer planning report and line listing and the other documentation outlined in the Documentation User Guide.

16. Direct selection estimates

The following table shows the approximate number of Direct selections you can achieve. Figures are based on nationally spread postings and assume that 100% of your addresses carry a full and accurate postcode. If your posting has any sort of regional bias, the proportion of Directs will consequently rise.

The table should enable you to estimate what proportion of your list is likely to achieve Direct discount status. This in turn should help you to work out the cost of the posting.

VOLUME Letters	High Sort Letters (50) % direct		VOLUME Large Letters	High Sort Large Letter (10) % direct	High Sort % direct
7000	0		4000	2	15
8000	0		5000	4	27
9000	0		6000	6	43
10000	0		7000	9	59
11000	0		8000	13	71
12000	0		9000	19	80
13000	0		10000	24	86
14000	0		11000	30	90
15000	0		12000	39	94
16000	0		13000	46	97
18000	1		14000	53	98
20000	2		15000	60	99
25000	4		16000	66	99
30000	6		18000	76	100
35000	8		20000	83	100
40000	11		25000	93	100
45000	16		30000	98	100
50000	21		35000	100	100
60000	34		40000	100	100
70000	49		45000	100	100
80000	62		50000	100	100
90000	73		60000	100	100
100000	80		70000	100	100
150000	98		80000	100	100
200000	100		90000	100	100
250000	100		100000	100	100
500000	100		150000	100	100
1000000	100		200000	100	100

17. Mixed formats and mixed weight

17.1 Mixing different weight items and formats

In certain cases, it is possible to submit mixed weight & format postings for Advertising Mail, Publishing Mail, Subscription Mail, Business Mail 1st Class and Business Mail.

Your posting may contain items that vary in size and shape but please note that postings which consist of mixed format items will have their price based on the largest format item present in the mailing and, depending on the item size and weight, you may need to bundle these items.

To make a mixed weight posting, you must meet the following conditions:

- all items are broadly similar in size and shape (so that they can be securely bundled together) but may vary in weight and thickness; the variation in weight may mean that the items are a mixture of formats
- all items are to be for the same standard of service e.g. 1st Class, 2nd Class and Economy
- where appropriate, additional documentation (i.e. computer planning report and enhanced line listing) must be provided in addition to the confirmed sales order. Where the posting is a large letter format Mailmark posting, the enhanced line listing as well as the eManifest must be received.

Mixed weight letters, large letters

If all items in a mixed weight large letter posting fall completely within the 0-100gms weight band or completely within the 101-250gm weight band then the method of documenting this type of posting will be by producing the standard line listing which details the total number of items within each selection and the number of bags per selection within the mailing. You will not be required to produce enhanced documentation as required for higher weight band mixed weight mailings.

Mixed weight large letters

Mixed weight large letter is a method of documenting a posting where the item weights can vary from 0 – 750g.

As an alternative to producing an enhanced line listing, where all items weigh over 250g, the daily rate method may be used.

18. Presenting your mail

18.1 Using a number of mailing houses for a large posting

If you have a very large list, where you need to mail all the items as quickly as possible, you may decide to split the posting between a number of mailing houses. If you do this you must:

- sort the posting as a single posting with no more than one set of Direct and Residue selections for High Sort or a single set of selections for Low Sort
- relate the split of the posting geographically to the location of the mailing houses involved - this will help to ensure a high quality of service
- reconcile the separate confirmed sales orders from each handover point to check that the complete posting has been made
- notify your Royal Mail account handler of your wish to split a posting

Where a mailing has been subcontracted to a mailing house, Contract Holder must ensure that they are kept informed of any further mailing houses that the posting is split between.

Splitting a posting is not permitted for postings being sent using the Mailmark option because each posting is identified by a unique Supply Chain ID which identifies all the Participants. If the end client wishes to have their posting split over a number of mailing houses then they must be classed as separate postings and all have individual and unique Supply Chain IDs and must meet the relevant product entry and presentation criteria.

18.2 Consolidated postings

Consolidated postings are only available with:

- Advertising Mail
- Business Mail 1st Class
- Business Mail

A consolidated posting is made up of a combination of mailing lists or a number of separate mailings (for example from more than one client), and must consist of:

- a single set of Direct selections* (applicable to High Sort)
- a single set of Residue selections* (applicable to High Sort)
- a single set of selections (applicable to Low Sort)
- a single computer planning report
- a single line listing
- the same PPI number of the customer who is making the consolidated posting
- confirmed sales order(s) (or for Mailmark option mailings, an eManifest Confirmation Receipt) from the customer making the consolidated posting
- for Mailmark option mailings an eManifest.

*Please Note:

A single set of selections is defined as bundles for a particular selection (postcode area) included in a single bag or tray. If that bag or tray is full or has reached the maximum weight allowed, a further bag must be used. Each selection must have only one bag or tray which is not either full or at its maximum weight.

Consolidated Mailmark option mailings are only permitted where the Supply Chain ID reference is the same and the items meet the above criteria.

The consolidated posting must meet all the contractual terms and conditions for the product used, including entry levels and documentation. You cannot simply combine a number of separately sorted postings without integrating them into a single Advertising Mail, Business Mail 1st Class or Business Mail mailing i.e. for any High Sort posting you can only have a single set of Direct selections and a single set of Residue selections. This must be done either:

- electronically, by combining the mailing lists into a single line listing and sorted to that line listing before production, or
- physically, by combining a number of already produced mailings to create a single set of selections either by a manual re-sort or by use of an automated sorting machine

Line listing

A line listing must be produced to reflect the make up of the final posting and where a posting contains items of differing weights, the enhanced mixed weight documentation, where applicable, must be produced. Where you have mixed your formats, please note that you will be charged for the largest format within the posting.

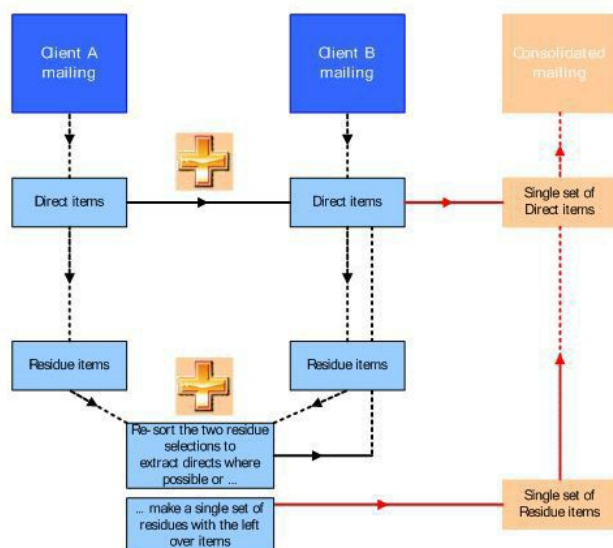
Spreading a consolidated posting

For all of our sorted product options, a consolidated posting may be spread over a number of working days depending on the overall volume.

Payment

As the customer producing the consolidated posting is deemed to be the customer, and holds the Royal Mail agreement, they will also have a Royal Mail account and hold their own OBA to enable a confirmed sales order to be provided on each day of the mailing. No third party OBA can be used:

- only one payment channel (PPI or stamps) may be used in a single posting, consolidated mail cannot be presented as a single posting if items use different payment channels
- where a printed PPI is used as the postage indicator, a single posting must have the same PPI licence number on all items
- consolidated mail cannot be presented as a single posting with different PPI numbers
- a customer may use any, or all, of the four permissible sizes for PPIs in a single posting provided all items display the same licence number
- different third party return addresses may be used within a single posting
- undeliverable PPI items will only be returned if they carry a valid UK return address



Please Note:

- Consolidating postings are NOT allowed with Publishing Mail or Subscription Mail
- It is not possible to combine postings of different Royal Mail products into a single posting. We will consider the party who is consolidating postings as the customer, and that customer must hold the appropriate agreement for the product which is being used.

19. Machine processing of postings presented as High Sort or 'non machine-readable'

Any letter, including polywrapped letters or large letter format items, presented in any of our product streams, is liable to be presented to one or more of our sorting machines during the course of its journey.

Items which are successfully processed through our machines will have code marks applied:

- for letters this is a maximum of two luminescent codes sprayed in specific areas on the front of the mailpiece, as shown in the example below

Unwrapped items with very high gloss print finishes may suffer scuff marks as a result of machine handling, particularly if they have been produced through digital print presses. We want to provide you with the best possible service when using products so mailings are received by customers in great condition. This is why we recommend that these items are wrapped or a UV coating applied to the non-address side of the mail piece.

Example of luminescent codes as applied to machine processed letters:

