

Postally Dashboard User Guide

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1. Getting Started

Welcome to Postally! This guide walks you through every feature of the Postally dashboard — from managing recipients to monitoring mailpieces and tracking deliveries. The dashboard is your management and monitoring hub; all mail sending is done via the API.

1.1 Logging In

Navigate to your Postally dashboard URL and enter your email and password. After logging in, you will see the main dashboard with an overview of your account activity.

1. Open your browser and go to your Postally dashboard URL.
2. Enter your email address and password.
3. Click "Sign In" to access your account.
4. You will land on the Dashboard home page with stats and charts.

Note: New accounts will see an email verification banner at the top of the dashboard. You must verify your email address before you can send mail, create campaigns, or place orders. Click the link in your verification email, or use the Resend button in the banner.

1.2 Dashboard Home

The home page displays key metrics at a glance:

Feature	Description
Total Mailpieces	Count of all mail pieces sent, with status breakdown
Active Campaigns	Number of campaigns currently in progress
Credit Balance	Your current prepaid credit balance
Recent Activity	Timeline of recent sends, campaigns, and orders
Charts	Visual breakdown of mail volume by type and status

1.3 Navigation

The sidebar provides access to all sections:

Section	Description
Dashboard	Home page with stats and charts
Recipients	Manage contacts and mailing lists
Templates	Design mail piece templates
Self-Mailers	Self-mailer templates (filtered view)
Envelopes	Custom envelope designs
Buckslips	Insert card designs
Mailpieces	Track sent mail
Campaigns	Batch send management
Orders	Pay-per-job order management
Billing	Credits, top-up, and payment history
Settings	Account, API keys, webhooks, and triggers

Tip: Toggle dark mode using the theme switch in the top-right corner of the dashboard.

2. Managing Recipients

Recipients are the people or organizations that receive your mail. All personal information is encrypted at rest for security and compliance.

2.1 Adding a Single Recipient

1. Navigate to Recipients in the sidebar.
2. Click "Add Recipient" button.
3. Fill in the required fields: address line 1, city, and postal code.
4. Optionally add: name, company, email, phone, and metadata.
5. Click "Save" to create the recipient.

Note: Address line 1, city, and postal code are required. All other fields are optional.

2.2 Bulk Import

Import up to 10,000 recipients at once from a CSV file.

1. Go to Recipients and click "Import".
2. Upload your CSV file with columns matching recipient fields.
3. Optionally select a group to add all imported recipients to.
4. Review the import preview and click "Import".
5. The results will show how many were created and any errors.

Tip: CSV columns should match field names: first_name, last_name, company, address_line1, address_line2, city, state, postal_code, country, email, phone.

2.3 Editing and Deleting

Click on any recipient to view their details. Use the Edit button to update fields, or Delete to remove them. Deleted recipients are soft-deleted and can be recovered by support.

2.4 Suppressing Recipients

Suppressing a recipient prevents all future mail from being sent to them. This is useful for unsubscribe requests or compliance. Click the "Suppress" button on a recipient and optionally provide a reason.

Note: Suppressed recipients cannot receive mail until unsuppressed. Use this for Do Not Contact requests.

2.5 Recipient Groups

Groups organize recipients for campaigns and bulk operations.

1. Go to Recipients > Groups.
2. Click "Create Group" and enter a name and optional description.
3. Add recipients to the group by selecting them.
4. Use groups when creating campaigns via the API to send to all members at once.

Each group shows a badge with the current member count. You can search, rename, or delete groups.

3. Creating Templates

Templates define the design and content of your mail pieces. Create templates with HTML content and merge variables, or upload PDF designs.

3.1 Template Types

Type	Description
Postcard	Single or double-sided postcards in 4 sizes: 4x6, 5x7, 6x9, 6x11 inches
Letter	Standard 8.5x11 letters, up to 20 pages
Self-Mailer	Tri-fold (6x18) or bi-fold (7x10, 8.5x11, 9x12) self-mailing pieces

3.2 Creating a Template

1. Navigate to Templates in the sidebar.
2. Click "Create Template".
3. Choose the type (postcard, letter, or self-mailer) and format. Postcard formats include 4x6, 5x7, 6x9, and 6x11.
4. Select a paper finish: matte (default) or glossy. This determines the paper coating used for printing.
5. Enter HTML content with merge variables like `{{first_name}}` and `{{company}}`.
6. Or upload PDF files for front and back designs using the file upload.
7. List the merge variable names your template uses.
8. Click "Save" to create the template.

Tip: Postcards support Lettermail (first_class) mail class in addition to the default Personalized Mail (standard). Lettermail is available for lightweight postcards and offers different Canada Post pricing. Set `mail_class` when sending via the API.

3.3 Merge Variables

Use double curly braces to insert personalized data: `{{first_name}}`, `{{company}}`, `{{custom_field}}`. When sending mail via the API, you provide `merge_data` values that replace these placeholders. Variables not included in `merge_data` are replaced with empty strings to prevent raw template syntax from appearing in printed output.

3.4 Publishing

Templates must be published before they can be used in API sends and campaigns. Click "Publish" on a template to make it available. You can unpublish to prevent further use while editing.

When using a template via the API, the following validations are enforced:

The template must be published.

The template format must match the request (e.g., a postcard_4x6 template cannot be used with size: postcard_6x9).

The template type must match the endpoint (e.g., a postcard template cannot be used with POST /v1/letters/create).

The template must have at least one saved design from the template builder.

The template ID is shown on the template detail page in the dashboard with a copy button for easy use in API calls.

3.5 Image Quality

For best print results, use images with at least 300 DPI at their placed size. The template builder will warn you if an image's effective resolution is below 150 DPI, which may appear blurry when printed. High-resolution source images (at least 1500px wide for a 4x6 postcard) are recommended.

3.6 Views

Toggle between Grid view (visual cards) and List view (compact table) using the view switcher. Use the search bar and type filter to find specific templates.

4. Envelopes & Buckslips

4.1 Custom Envelopes

Create custom envelope designs for your letters. Postally supports these envelope sizes:

Size	Description
#10 Standard	Standard business envelope (4.125 x 9.5 inches)
#10 Window	Business envelope with address window
#9 Reply	Smaller return envelope (3.875 x 8.875 inches)
6x9 Booklet	Open-side booklet envelope
9x12 Flat	Large flat envelope for multi-page documents

Upload front and back PDF designs. For windowed envelopes, specify the window position coordinates so the recipient address shows through correctly.

4.2 Return Envelopes

Include a prepaid return envelope in your letters. Set the postage type to "prepaid first class" or "business reply" to pay for return postage upfront.

4.3 Buckslips

Buckslips are small insert cards placed inside letter envelopes. Available sizes: 3.5x8.5, 4x6, 5x7, and 3.5x6 inches. Upload front and back PDF designs.

5. Tracking Mailpieces

5.1 Mailpiece List

Navigate to Mailpieces to see all sent mail. Use filters to narrow by:

Filter	Description
Status	created, queued, processing, printing, dispatched, delivered, etc.
Type	postcard, letter, self_mailer
Campaign	Filter by specific campaign
Billing Group	Filter by billing group label

5.2 Mailpiece Details

Click on any mailpiece to view: full cost breakdown, recipient details, template used, tracking ID and carrier, QR scan analytics (if enabled), and all status transitions with timestamps.

5.3 Status Lifecycle

Status	Description
Created	Mailpiece created, in queue
Queued	Waiting for production batch
Processing	Being prepared for printing
Printing	Currently being printed
Dispatched	Handed to postal carrier
In Transit	Moving through carrier network
In Local Area	At local delivery facility
Delivered	Successfully delivered to recipient
Returned	Undeliverable, returned to sender
Failed	Production or delivery failure
Cancelled	Cancelled within the cancellation window

5.4 Cancellation

Mailpieces can be cancelled at any time before 11:59 PM Pacific Time (America/Vancouver) on the day they were created. Submissions are batched and dispatched to the print house each night at 2:00 AM Pacific. Pieces submitted late in the evening have a correspondingly shorter cancellation window. After the deadline, pieces cannot be cancelled. Cancellation is performed via the API or, for campaigns, the dashboard.

6. Campaigns

Campaigns let you send mail to an entire recipient group in one batch. Campaigns are created and approved via the API; the dashboard lets you monitor their progress.

6.1 Viewing Campaigns

Navigate to Campaigns in the sidebar to see all campaigns with their status, piece count, and estimated cost. Click on any campaign to view its details.

6.2 Campaign Lifecycle

Campaigns progress through these statuses after being created and approved via the API:

Status	Description
Draft	Campaign created, pending approval
Approved	Compliance checks passed, mailpiece creation in progress
Processing	Mailpieces being created and queued for production
Completed	All pieces created and dispatched
Failed	Campaign processing encountered errors

The system runs compliance checks at approval time: template exists and is published, group has recipients, and BAA is on file if the account is PHI-regulated.

Note: Once approved, a campaign cannot be cancelled. Individual mailpieces can be cancelled within their cancellation window via the API.

6.3 Monitoring Progress

View campaign details to see real-time progress: pieces sent, pieces delivered, pieces failed, and overall completion percentage.

6.4 Data Quality Checks

Before approving a campaign, Postally runs 14 data quality checks on the recipient list. Warnings are advisory (you can proceed); blockers must be resolved before the campaign can

be approved. Click Preview on any check with sample recipients to see exactly how the problematic piece will render.

Check	Severity
1. Missing address line 1	Blocker
2. Missing city	Blocker
3. Missing postal code	Blocker
4. Invalid country code	Blocker
5. Duplicate addresses (same recipient listed twice)	Warning
6. Long full name (40+ chars — may be clipped on envelope)	Warning
7. Long address (60+ chars — may overflow envelope window)	Warning
8. Missing first name	Warning
9. Missing last name	Warning
10. Missing company (when name is also missing)	Warning
11. Piece count within mail-class policy	Informational
12. (reserved)	—
13. Missing return address — postcard/letter	Warning
13. Missing return address — self-mailer	Blocker
14. Non-Canadian return address on self-mailer	Blocker

Checks 13 and 14 enforce Canada Post's self-mailer compliance rules: every self-mailer must have a complete Canadian return address on every recipient. Postcards and letters are not required to have a return address, but pieces without one cannot be returned by Canada Post if undeliverable — consider adding return_* fields to your CSV so you don't lose visibility into bad addresses.

7. Orders

Orders are used for pay-per-job billing. When mail is sent or a campaign is approved using pay-per-job billing via the API, an order is created and payment is completed via Stripe Checkout.

7.1 Order Lifecycle

Status	Description
Draft	Order created, pricing reserved for 24 hours
Awaiting Payment	Stripe Checkout session created, waiting for payment
Paid	Payment received, mailpieces entering production
Processing	Mail pieces being printed and prepared
Completed	All pieces dispatched
Cancelled	Order cancelled before payment
Expired	Quote expired (24 hours) without payment
Refunded	Payment reversed after completion

7.2 Viewing Orders

Navigate to Orders to see all your orders with status, piece count, and total cost. Click on any order to see full details including line-item pricing breakdown and Stripe receipt link.

7.3 Cancelling Orders

Only orders in "Draft" or "Awaiting Payment" status can be cancelled. Once payment is received, the order enters production and cannot be cancelled. Order cancellation is performed via the API.

8. Billing

8.1 Prepaid Credits

Prepaid credits give you the best per-piece pricing. Buy credits upfront and they are automatically deducted when you send mail via the API. Navigate to Billing to see your current balance.

8.2 Top-Up

Note: Volume bonuses are not currently active. The bonus tiers below are planned for a future release and are shown here for reference only.

Click "Top Up" and enter the amount (\$20 minimum, \$5,000 maximum). You will be redirected to Stripe to complete payment. Credits are added automatically after payment.

8.3 Credit History

View your full credit ledger showing every credit (top-up) and debit (send) with running balance.

8.4 Prepaid vs. Pay-Per-Job

Method	Description
Prepaid Credits	Lower per-piece cost. Best for regular API users and high-volume senders.
Pay-Per-Job	No upfront commitment. Pay exact cost per order via Stripe Checkout. Best for occasional use.

Tip: Use the price quote API endpoint (POST /v1/orders/quote) to compare costs between both billing methods before deciding.

9. Settings

9.1 Account Settings

View and update your company name, email, and account details. Your account ID and billing mode are displayed here.

9.2 API Keys

Manage your API keys for programmatic access. Each account has test and live keys. Test keys (dm_test_...) are for development; live keys (dm_live_...) send real mail.

Note: Keep your API keys secret. Never share them in public repositories or client-side code.

9.3 Webhooks

Configure outbound webhooks to receive real-time notifications when events occur (e.g., mailpiece delivered, campaign completed). Add a URL and select which events to subscribe to. The webhook secret is shown only once — save it securely.

9.4 Inbound Triggers

Set up event-to-mail automation. When an external service (like Shopify or HubSpot) sends data to your trigger URL, Postally automatically creates and sends a mail piece using the configured template and field mapping.

9.5 Dark Mode

Toggle between light and dark themes using the theme switch in the top-right corner. Your preference is saved automatically.

10. Admin Features

Admin features are available only to users with admin permissions.

10.1 QuickBooks Management

Connect your QuickBooks Online account to automatically sync revenue, expenses, and credit transactions. The admin panel shows connection status, recent sync activity, and lets you retry failed syncs.

10.2 Print Queue Management

View and manage the print production queue. Process queued mailpieces into job batches, trigger SFTP transmission to the print house, and update mailpiece statuses from print house feedback.

Action	Description
Process Queue	Batch queued mailpieces into print jobs (up to 500 per batch)
Transmit	Send job manifests and PDFs to print house via SFTP
Update Status	Record status updates from print house
Test SFTP	Verify print house SFTP connectivity