

Postally Print House Integration Guide

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1. Integration Overview

Postally outsources physical mail production to print house partners. This document describes the technical integration between the Postally platform and your print facility.

1.1 Data Flow

The integration follows a straightforward pattern:

Step	Details
Step 1	Postally batches queued mailpieces into job packages (up to 500 pieces per batch).
Step 2	Job manifest (CSV) and individual PDF files are transmitted to your facility via SFTP.
Step 3	Your facility prints, assembles, and mails each piece according to the manifest.
Step 4	You report status updates back to Postally via API (single or bulk endpoint).

1.2 What You Receive

Item	Details
Manifest CSV	Structured data for each mailpiece: type, format, recipient address, assembly instructions
PDF Files	One pre-rendered PDF per mailpiece, ready for production printing
Job ID	Unique identifier for the batch (format: JOB- <code>{unix_timestamp_ms}</code> - <code>{pieceCount}</code> , e.g., JOB-1710612345678-150)

1.3 What You Report

Item	Details
Status Updates	Production progress per mailpiece (printing, dispatched, delivered, failed)
Tracking IDs	Carrier tracking numbers when available

Item	Details
Carrier Name	Shipping carrier (e.g., Canada Post, USPS)

2. SFTP Configuration

Postally transmits job packages to your facility via SFTP (SSH File Transfer Protocol).

2.1 Connection Details

Provide the following to Postally for configuration:

Field	Type	Required	Description
sftp_host	string	Yes	SFTP server hostname or IP address
sftp_port	integer	No	Default: 22
sftp_username	string	Yes	SFTP login username
sftp_password	string	Cond.	Password (if not using SSH key)
sftp_private_key	string	Cond.	SSH private key (base64 encoded)
sftp_passphrase	string	No	Passphrase for SSH key (if encrypted)
sftp_remote_path	string	Yes	Base directory for incoming jobs (e.g., /incoming/)

Authentication supports either password or SSH private key. Provide one or the other.

2.2 Daily Batch Schedule

Postally accumulates all orders throughout the day and transmits them in a single daily batch at 2:00 AM Vancouver time (Pacific). Orders from multiple customers and campaigns are consolidated by format, postage class, and paper finish for efficient production runs.

2.3 Directory Structure

Jobs are organized by format, with each daily batch in a date-stamped subdirectory that includes the postage class and paper finish:

```
/incoming/{format}/{YYYY-MM-DD}-{postage_label}-{paper_finish}/
```

Example:

```
/incoming/postcard_4x6/2026-04-08-personalizedmail-matte/
```

```
manifest.csv
```

```
print-batch-{id}.pdf (up to 500 pieces per PDF)
```

```
print-batch-{id}-part-2.pdf (if >500 pieces)
```

```
/incoming/postcard_5x7/2026-04-08-lettermail-glossy/
```

```
manifest.csv
```

```
print-batch-{id}.pdf
```

The folder name tells you the paper stock and postage class without opening the manifest. Each folder contains only pieces of the same format, postage class, and paper finish — ready for a single press run.

2.4 Connectivity Testing

Postally provides a connectivity test endpoint that verifies SFTP access, directory listing, and write permissions. Contact Postally to run a test before going live.

2.5 Retry Behavior

SFTP transmission retries automatically: 3 attempts with 2-second base delay and exponential backoff. If all retries fail, the job is flagged for manual intervention.

3. Job Package Structure

3.1 Manifest CSV

The manifest.csv file contains one row per mailpiece with the following columns:

Field	Type	Required	Description
piece_id	uuid	Yes	Unique identifier for this mailpiece
type	string	Yes	postcard letter self_mailer
format	string	Yes	postcard_4x6 postcard_5x7 postcard_6x9 postcard_6x11 letter_standard self_mailer_6x18 self_mailer_8.5x11 self_mailer_7x10 self_mailer_9x12
mail_class	string	Yes	personalized_mail lettermail (Canada Post classes, mapped from internal standard/first_class)
duplex	boolean	Yes	true = double-sided, false = single-sided
page_count	integer	Yes	Number of pages (1 for postcards, 1-20 for letters)
recipient_name	string	Yes	Full name (first + last) or company name
recipient_company	string	No	Company name (if separate from name)
address_line1	string	Yes	Street address line 1
address_line2	string	No	Street address line 2

Field	Type	Required	Description
city	string	Yes	City
state	string	No	State/province code
postal_code	string	Yes	Postal/ZIP code
country	string	Yes	2-3 character ISO country code
template_id	uuid	No	Template reference
envelope_id	uuid	No	Envelope reference ("default" for standard #10)
return_envelope_id	uuid	No	Return envelope reference
buckslip_id	uuid	No	Buckslip insert reference
qr_code_enabled	boolean	Yes	Whether QR code is printed on the piece
paper_finish	string	Yes	matte or glossy — determines paper stock to use
contains_phi	boolean	Yes	Whether this piece contains Protected Health Information
billing_group	string	No	Customer billing group label
campaign_id	uuid	No	Campaign this piece belongs to (for multi-campaign daily batches)
campaign_name	string	No	Human-readable campaign name
daily_batch_id	uuid	No	Daily batch bundle this piece belongs to
pdf_filename	string	Yes	Filename of the corresponding PDF in the job directory

3.2 Assembly Instructions

Use the manifest fields to determine assembly for each piece:

Type	Instructions
Postcards	Print front and back (if duplex). No envelope needed.
Letters	Print pages, fold, insert into envelope. Add buckslip if buckslip_id present. Add return envelope if return_envelope_id present.
Self-Mailers	Print and fold per format: tri-fold for 6x18, bi-fold for 8.5x11, 7x10, and 9x12. No envelope.

4. Mailpiece Specifications

4.1 Format Dimensions

Format	Dimensions
postcard_4x6	6" x 4" landscape. Standard postcard.
postcard_5x7	7" x 5" landscape. Greeting card size postcard.
postcard_6x9	9" x 6" landscape. Oversized postcard.
postcard_6x11	11" x 6" landscape. Large postcard.
letter_standard	8.5" x 11" portrait. Standard letter page.
self_mailer_6x18	18" x 6" landscape. Tri-fold self-mailer.
self_mailer_8.5x11	11" x 8.5" landscape. Bi-fold letter-size self-mailer (folds to 5.5" x 8.5").
self_mailer_7x10	10" x 7" landscape. Bi-fold self-mailer (folds to 5" x 7").
self_mailer_9x12	12" x 9" landscape. Bi-fold self-mailer (folds to 6" x 9").

4.2 Print Specifications

Specification	Details
Resolution	300 DPI minimum. PDFs are rendered at 300 DPI.
Color	Full color (CMYK). PDFs are RGB; convert to CMYK for production.
Bleed	0.125" bleed on all sides. Trim to final size.
Safe Zone	0.25" from trim edge for critical content.
Paper Stock	Per your standard stock unless specified by Postally.
Duplex	When duplex=true, print both sides. Page 1 = front, Page 2 = back.

4.3 Envelope Sizes

Size	Dimensions
number_10_standard	4.125" x 9.5" — Standard #10 business envelope
number_10_window	4.125" x 9.5" — #10 with address window
number_9_reply	3.875" x 8.875" — #9 return/reply envelope
6x9_booklet	6" x 9" — Open-side booklet envelope
9x12_flat	9" x 12" — Large flat envelope

4.4 Buckslip Sizes

Size	Description
3.5x8.5	Standard buckslip (fits #10 envelope)
4x6	Postcard-size insert
5x7	Large insert
3.5x6	Small insert

5. PDF Files

5.1 File Naming

Each PDF is named with the mailpiece UUID: {piece_id}.pdf. Match the pdf_filename column in the manifest to the corresponding PDF file in the job directory.

5.2 Render Specifications

PDFs are pre-rendered by Postally with:

Property	Details
Dimensions	Exact final dimensions per format (including bleed)
Resolution	300 DPI
Margins	None (full bleed). Address block and content pre-positioned.
QR Code	Pre-embedded if qr_code_enabled=true
Address Block	Pre-positioned per USPS/Canada Post standards
Return Address	Pre-positioned in upper-left corner

5.3 Multi-Page Documents

Letters may have multiple pages (up to 20). The PDF contains all pages. For duplex printing, pages pair as: 1-2 (sheet 1), 3-4 (sheet 2), etc.

6. Status Reporting

Report production status back to Postally via API. This updates customers in real-time and triggers webhook notifications.

6.1 Single Status Update

POST /admin/print/update-status

Field	Type	Required	Description
piece_id	uuid	Yes	Mailpiece ID from the manifest
status	string	Yes	New status (see valid transitions below)
tracking_id	string	No	Carrier tracking number
carrier	string	No	Carrier name (e.g., Canada Post, USPS)

6.2 Bulk Status Update

POST /admin/print/bulk-status

Update multiple pieces in a single request. Recommended for batch processing.

```
{ "updates": [  
  { "piece_id": "uuid-1", "status": "printing" },  
  { "piece_id": "uuid-2", "status": "dispatched", "tracking_id": "CP123456",  
    "carrier": "Canada Post" }  
] }
```

```
Response: { "processed": 2, "results": [...] }
```

6.3 Valid Status Transitions

Mailpieces must follow valid status transitions. Invalid transitions return an error.

Transition	Description
processing -> printing	Print job started
processing -> failed	Pre-production failure
printing -> dispatched	Printed and handed to carrier
printing -> failed	Print production failure
dispatched -> in_transit	In carrier network
dispatched -> failed	Carrier rejected
in_transit -> in_local_area	At local delivery facility
in_transit -> delivered	Delivered to recipient
in_transit -> returned	Undeliverable, returned
in_transit -> failed	Lost in transit
dispatched -> inducted	Printed, ready for Canada Post induction
inducted -> in_transit	In carrier network
inducted -> in_local_area	At local delivery facility
inducted -> delivered	Delivered
inducted -> returned	Undeliverable
inducted -> failed	Induction failure
in_local_area -> delivered	Final delivery
in_local_area -> returned	Undeliverable
in_local_area -> failed	Delivery failure

Important: Invalid transitions (e.g., delivered -> printing) will be rejected with an error via the API. However, Trello-driven moves bypass transition validation — moving a card between any lists will update mailpiece statuses accordingly, since the print house is the authority on physical mail status.

6.4 Automatic Status Sync via Trello

Postally creates ONE Trello card per BUNDLE (not per drop) on the shared POSTALLY board. Each card is a (format × mail_class × paper_finish × spec_version) group — e.g. 'postcard_4x6 · Personalized Mail · matte · 200 pcs · 2026-04-11'. Different bundles may have different

print/ship timelines (glossy postcards on one press, matte self-mailers on another), so moving one card does not affect another.

When you move a card between lists, Postally updates the mailpiece statuses in THAT bundle only — scoped to the specific daily_batch row the card tracks. The drop-level status rolls up automatically once every bundle in the drop reaches a terminal state.

Trello List	Mailpiece Status
Received / Inbox	(no change — card created here)
Printing	(no change — informational)
Printed	inducted (Canada Post accepted the bundle)
Shipped / In Transit	in_transit
Delivered / Complete	delivered
Failed / Rejected	failed
On Hold	(no change — logged for visibility)

Status moves are bidirectional — if you move a card back (e.g., from Shipped to Printed), the mailpiece statuses follow. DataCore is the authority on physical mail status, so transition validation is bypassed.

Card anatomy:

Card title: '{format} · {postage} · {finish} · {pieces} pcs · {drop_date}'

Card body: drop date, format, postage, finish, spec version, SFTP path for PDF pickup

Card description includes a workflow guide describing which list moves trigger which status transitions

Important: If a Trello card is deleted, Postally flags the bundle AND the drop, and sends an alert email to the account owner. Do not delete cards — archive them instead if the job is complete.

Legacy one-card-per-drop cards (from before 2026-04-11) continue to work via a fallback lookup path — the webhook checks daily_batches.trello_card_id first, then falls back to daily_drops.trello_card_id if no batch-level card matches.

7. Postage Modes

Postally supports two postage handling modes. The mode is configured per print house and affects billing and operational responsibility.

7.1 Bundled Mode (Default)

Item	Details
Responsibility	Print house handles all postage as part of the production service.
Billing	Postally pays print house a single invoice covering print + postage.
Customer View	Customer sees one "Print & Mail" line item on their invoice.
Accounting	Single cost line in QuickBooks: Production Costs.

7.2 Separate Mode

Item	Details
Responsibility	Postally handles postage independently (e.g., meter, permit).
Billing	Print house invoice covers production only. Postage billed separately.
Customer View	Customer sees distinct "Printing" and "Postage" line items.
Accounting	Two cost lines in QuickBooks: Production Costs + Postage Costs.

8. Protected Health Information (PHI) Handling

Some mailpieces contain Protected Health Information (PHI). Postally is not HIPAA-certified and does not act as a HIPAA-covered entity or business associate. The controls below describe how PHI-flagged mailpieces are routed and handled, and the obligations production partners agree to in their service agreement with Postally.

8.1 PHI Routing

Mailpieces with `contains_phi=true` in the manifest are only routed to print houses with the internal `phi_eligible` flag set on their `print_house` record. Print houses receive the `phi_eligible` flag based on the data-handling commitments documented in their service agreement with Postally. If your facility is not `phi_eligible`, PHI mailpieces will not be routed to you.

8.2 Data Handling Obligations

Obligation	Details
Access Control	Restrict access to PHI mailpieces to authorized personnel only.
Secure Storage	Store PHI manifests and PDFs in encrypted or secured storage.
Minimum Necessary	Only access PHI data needed for production.
Disposal	Securely dispose of all PHI data after production (shred manifests, delete PDFs).
Incident Notification	Notify Postally immediately of any suspected PHI exposure or unauthorized access.
Logging	Maintain access logs for PHI data handling.

8.3 PHI Disclosure Logging

Postally automatically logs every PHI disclosure to your facility in the disclosure-accounting system (queryable via `GET /v1/hipaa/disclosure-accounting` by the customer who owns the recipient). This includes: which recipient, what fields were disclosed, timestamp, and purpose (mail production).

Important: PHI mailpieces must be handled with the same security as medical records. Failure to comply with the data-handling obligations above may result in service-agreement

termination.

9. Production Pipeline Timing

9.1 Queue Processing

Postally processes the print queue periodically, batching queued mailpieces into job packages. Each batch can contain up to 500 pieces. Jobs are grouped by format, mail class, and components for efficient production.

9.2 Transmission

After batching, jobs are transmitted to your facility via SFTP. Transmission includes the manifest CSV and all PDF files. A successful transmission updates piece status from "queued" to "processing".

9.3 Target Timelines

Note: These are target timelines, not contractual SLAs. Actual timing depends on volume and operational conditions.

Phase	Timeline
Queue to Transmission	Within 1 hour of queue processing
Transmission to Printing	Report "printing" status within 4 hours of receipt
Printing to Dispatch	Within 24 hours for standard volume
Dispatch to Delivery	Depends on mail class and carrier (2-14 business days)

9.4 Error Handling

If a piece fails at any production stage, update its status to "failed" with the piece_id. Postally will notify the customer and may re-queue the piece for another attempt or issue a refund.

9.5 Contact

For integration support, connectivity issues, or production questions, contact Postally support at support@postally.ca.