Mailers+4 Instructions

Meeting new bulk mailing requirements

Information Technology Services – Kasey Graves
1/21/2009

In November 2008 the US Postal Service imposed new requirements for entities wishing to receive bulk mail discounts….
1. Addresses must be verified as valid deliverable US mailing addresses
2. Addresses must be processed through NCOA (National Change of Address) database within 95 days of mailing

Mailers+4 software will verify/standardize addresses and provides access to submit your addresses (if necessary) for NCOA processing. If your addresses are pulled from Banner you do not need so submit them for NCOA processing. Banner addresses are sent to NCOA every 95 days.
The following pages contain…
1. Step by step instructions for verifying/standardizing addresses with Mailers+4
2. Using Mailers+4 to submit addresses to MelissaData for NCOA processing

If you are unable to meet these requirements for a particular mailing, but still wish to receive bulk rate discounts the USPS offers services you may be able to take advantage of (check with Roger Marsh). You can add "OR CURRENT RESIDENT" to each mail piece and receive the bulk rate without address validation or NCOA processing. The last page of this document was provided by Roger to show some samples of these alternatives.

Launch Mailers+4 software with desktop icon.

In the upper left-hand corner, click "File" then "Open" or simply click on the manila folder icon…

Choose the type of data file you will be using from the "Files of Type" drop down box at the bottom of the search window, then browse to the folder that contains your file of mailing addresses. For this example we are using an Excel spreadsheet. **ALWAYS SORT YOUR SPREADSHEET BY ZIP BEFORE BEGINNING.**
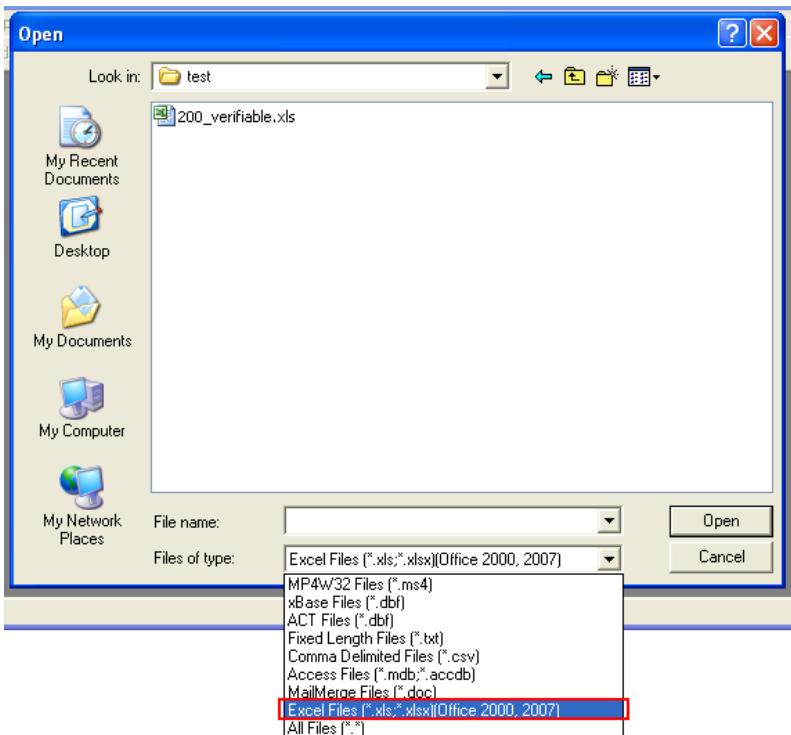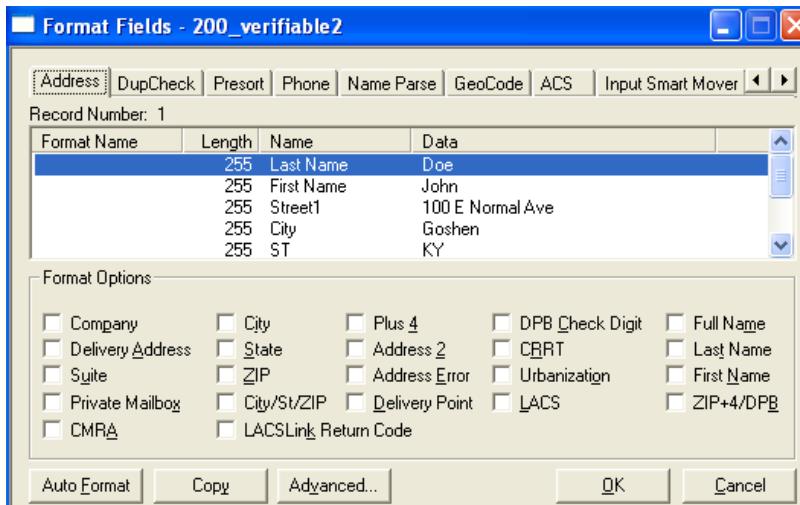
Opening the spreadsheet produces this window showing the type of file and number of records it contains.
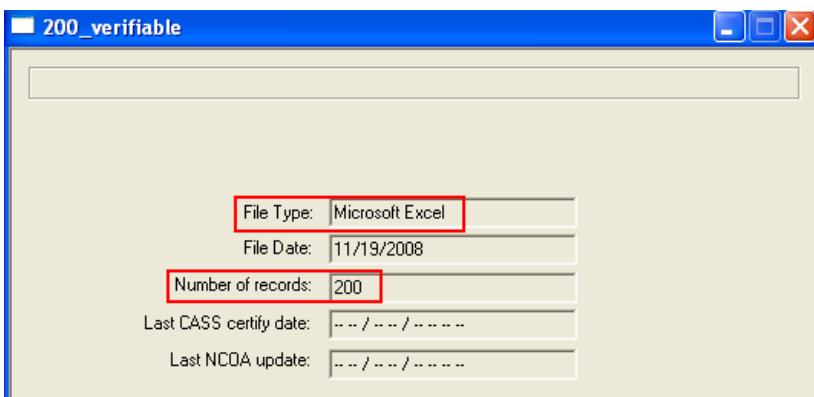
Next click on the "Format" button….
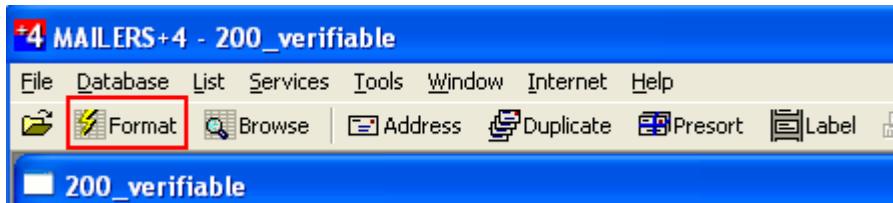
…which will open a window that shows your column header names and displays the first record in your file.


Click the "Auto Format" button in the lower left-hand corner and the software will do its best to figure out what each column contains based on the column header name in your file.
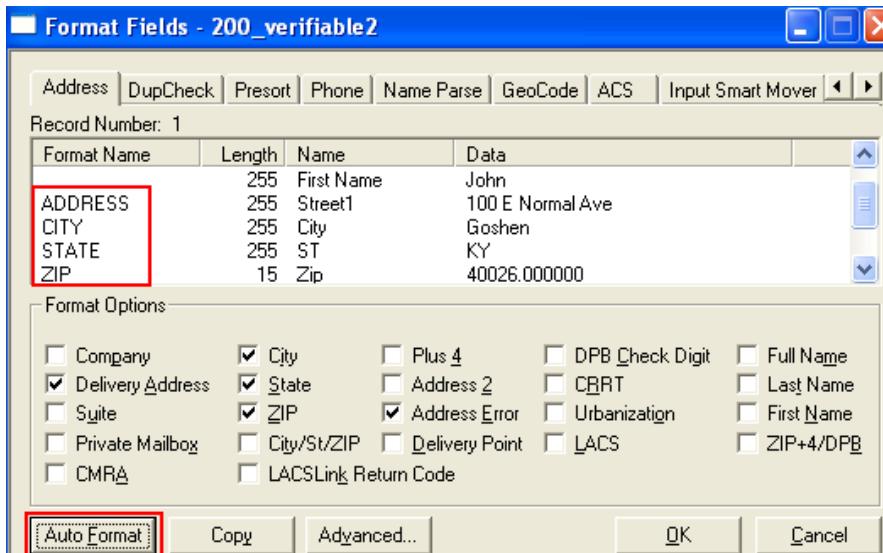

In the example above, the software recognized the ADDRESS (Delivery Address), CITY, STATE, and ZIP columns automatically based on the column header name in the spreadsheet.

If your file contains header names that are not automatically identified, simply click on the item in the list (it becomes highlighted in blue) and then put a checkmark in the appropriate box below.

In this example, Mailers+4 did not recognize the header name "Street Line 1" so you would simply click that item in the list and then put a checkmark by Delivery Address to format this column.
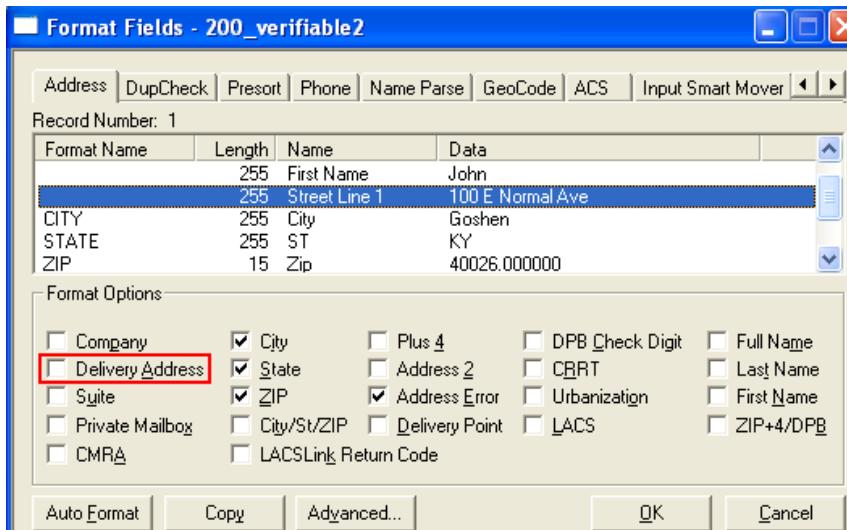

This mapping must be completed for all parts of the address (ADDRESS, CITY, STATE, and ZIP). To make it easy to identify addresses that cannot be verified by Mailers+4 it is advisable to add an empty column with header named ADDERR to the end of your spreadsheet before you begin processing. Mailers+4 will recognize this header and put an error code in this column that indicates what type of problem it experienced while processing the address.
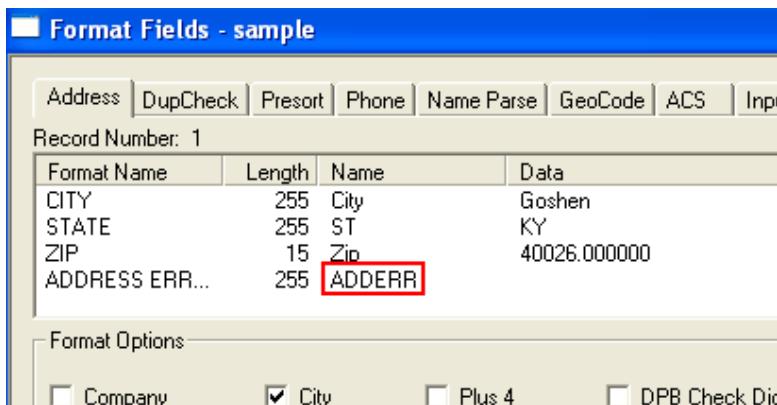

Your spreadsheet can contain many columns in addition to those storing address information. While it is only necessary to format the address pieces it is advisable to also format the First Name and Last Name fields. This will make error resolution easier since Mailers+4 will display the name associated with each address.

After you've formatted all of the appropriate fields click "OK" and you'll be returned to the summary screen. Click the "Address" button to begin the process of validating your addresses.
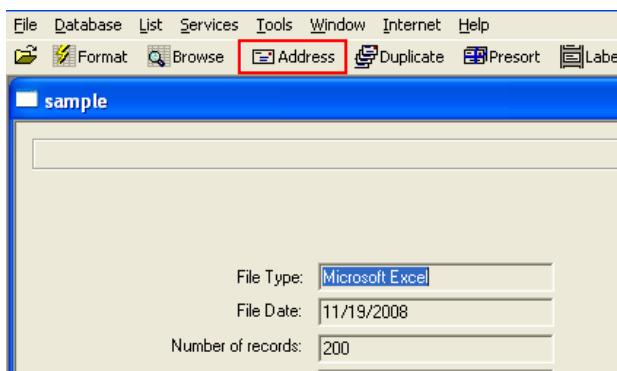
Below is an example of the screen that will be displayed. You'll want to accept all of the default values, so simply click the "Go" button in the lower right-hand corner to begin.
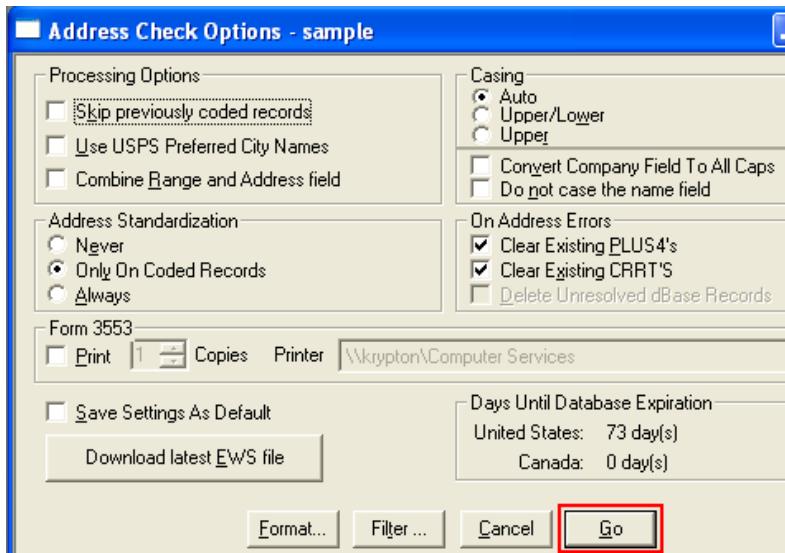
After a few seconds, Mailers+4 will begin validating and standardizing the addresses in your spreadsheet. This means that not only will it check to make sure that "100 East Normal Avenue" is an existing, mailable address, but it will convert it to the standardized format that the US Postal Service requires. In this case "100 E Normal Ave"

The picture below shows that our 200 addresses were processed, but 2 errors were found.
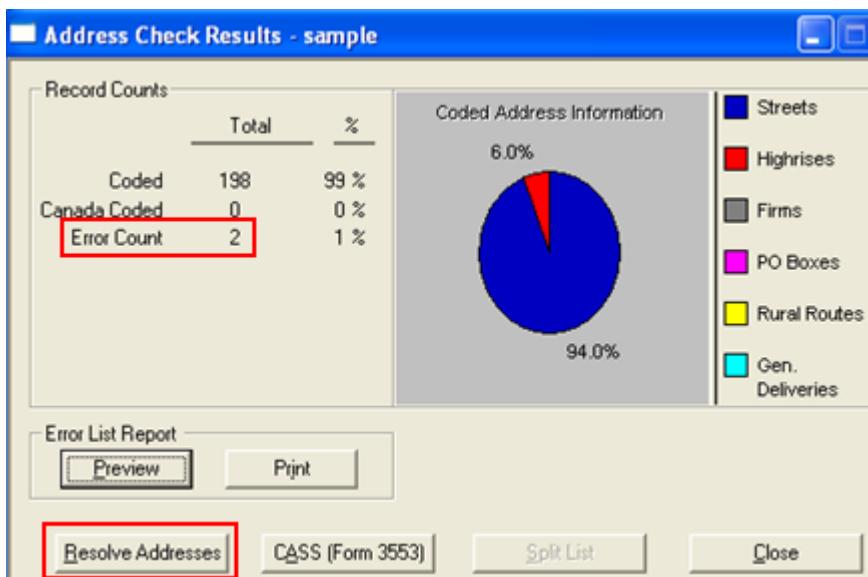
For large files you would have the option of simply removing the records in error from your file and mailing them first class. In this example we have only 200 total records (the minimum for a bulk mailing) so we must resolve both errors to have enough to receive bulk rate.

Press the "Resolve Addresses" button in the lower left-hand corner to begin correcting addresses.

A screen like this one will pop up displaying the addresses that need correcting. Select the first address you want to fix and click the "Resolve" button in the lower right-hand corner.
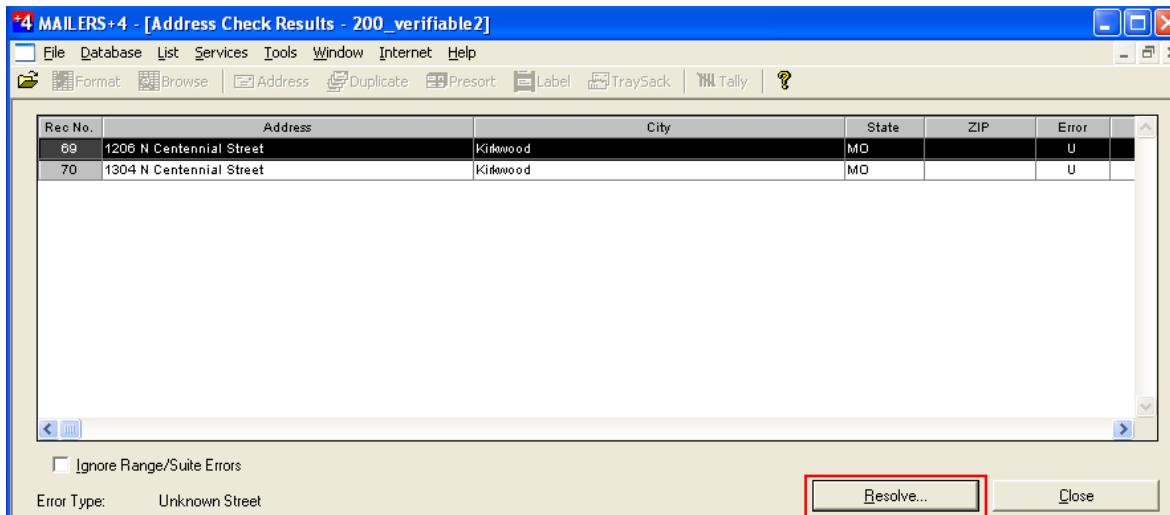

A detail screen will pop up showing what type of error was encountered. For the purpose of this example, we chose to very simple errors. Both records were mistakenly created for "Kirkwood" instead of "Kirksville." The error occurs because these are not valid addresses in Kirkwood, MO.
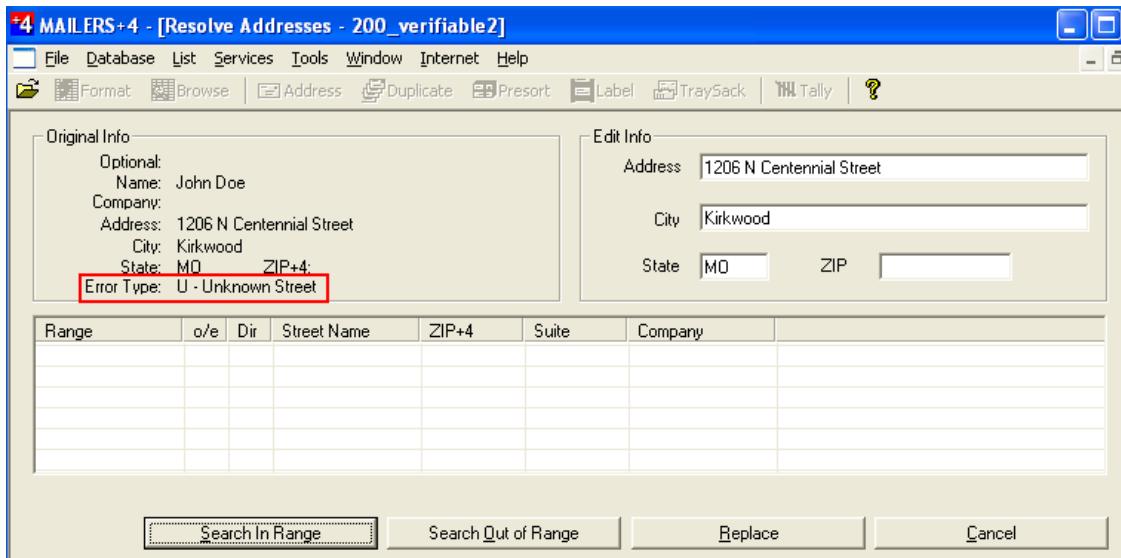

To fix this, simply type in the correct information and click the "Replace" button.
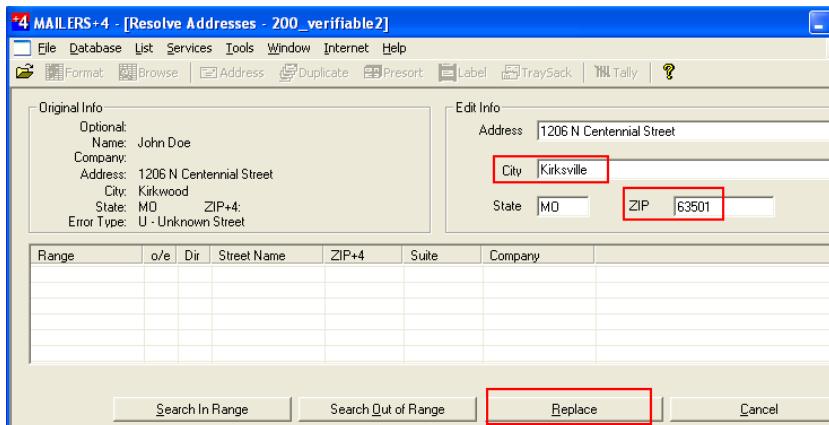
You'll return to the error listing screen, but the error code will be removed from the address(es) that you've fixed. When you are done correcting addresses click "Close" in the lower right-hand corner.
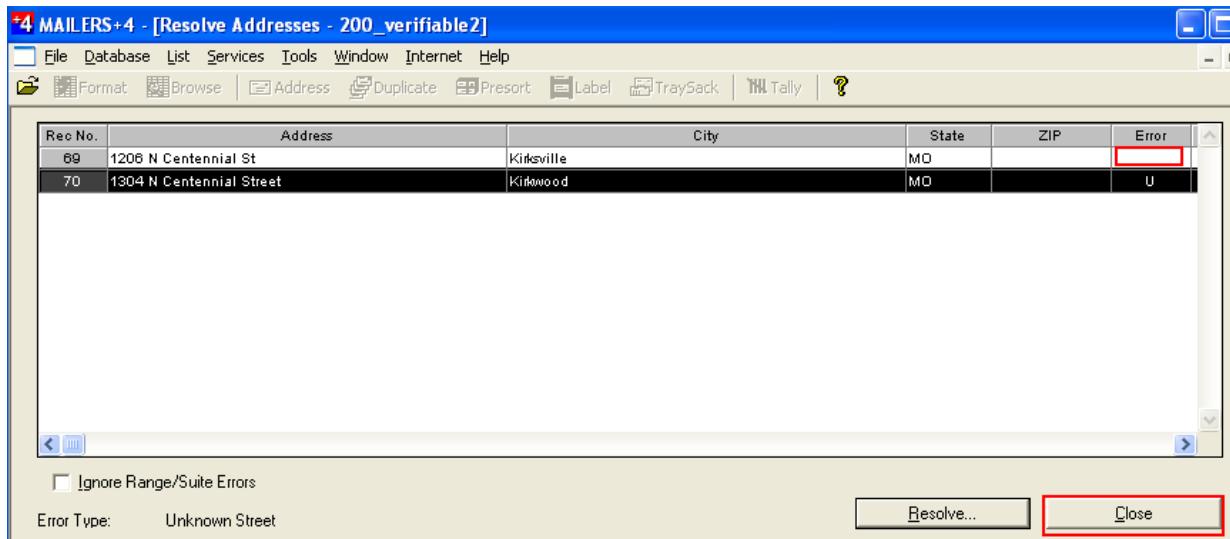

You are taken back to the results summary screen which now shows that 100% of your addresses have been correctly coded and no errors remain. You can now click the "CASS" button and print the certification statement that must accompany your mailing.
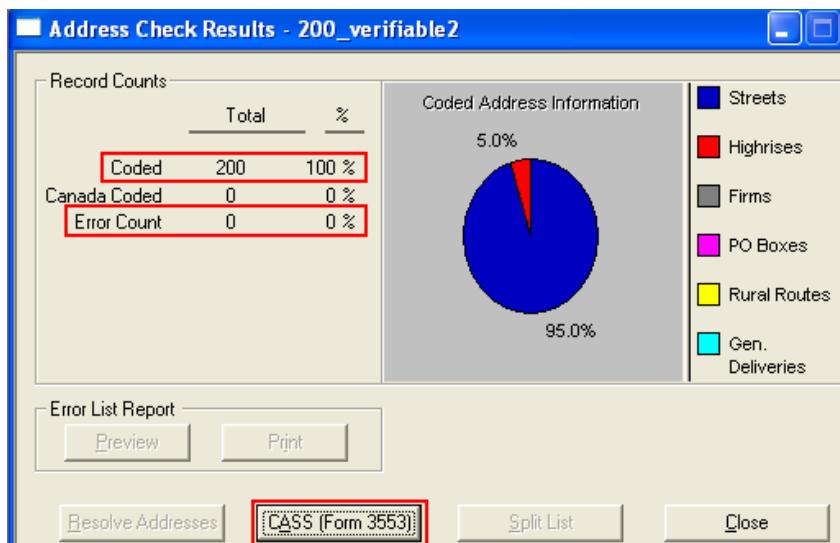
Supply required info and check "Save as default" to avoid re-entering it in the future. Print form using "CASS Print" button and then click "OK."

Click "Close" on results page to return to file summary page. Notice the "CASS certify date" has been updated.
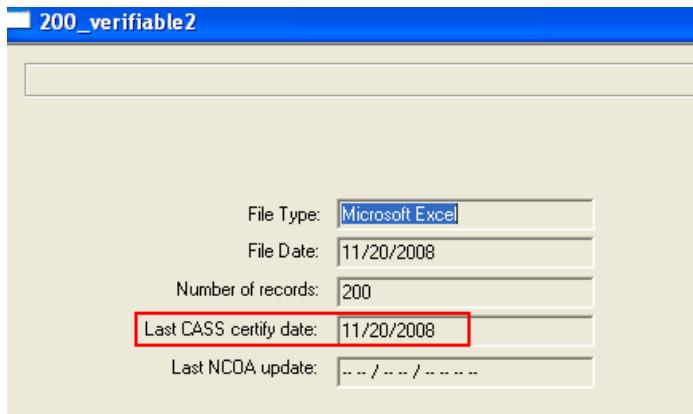

Your spreadsheet should now contain only clean addresses. At this point you could 1.) exit Mailers+4, ***resort your spreadsheet by zip code*** and print your labels or 2.) remain in Mailers+4 and use the Presort button to print the postage report needed by the University Mailroom (instructions begin below)
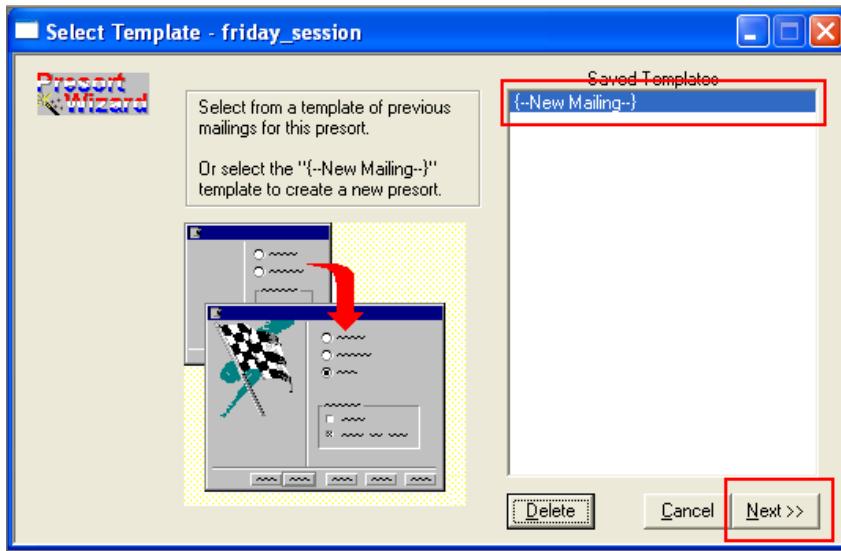
*It is very important that you resort your spreadsheet by zip code before printing your labels. Any zip codes that were corrected by Mailers+4 will affect your sort order.
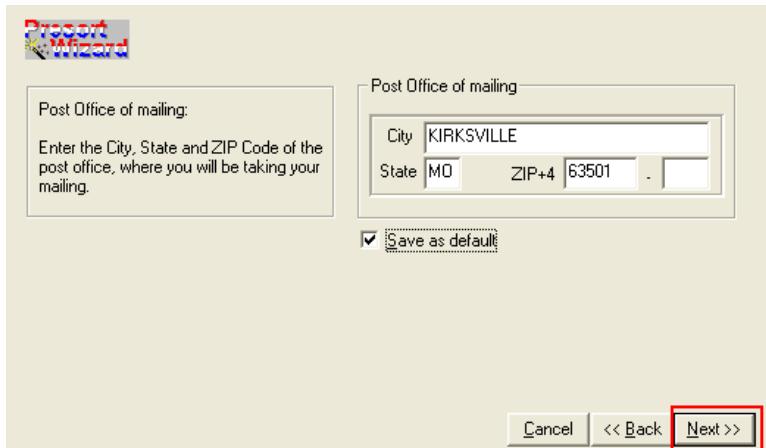
Printing Postage Report:

Click the "Presort" button.
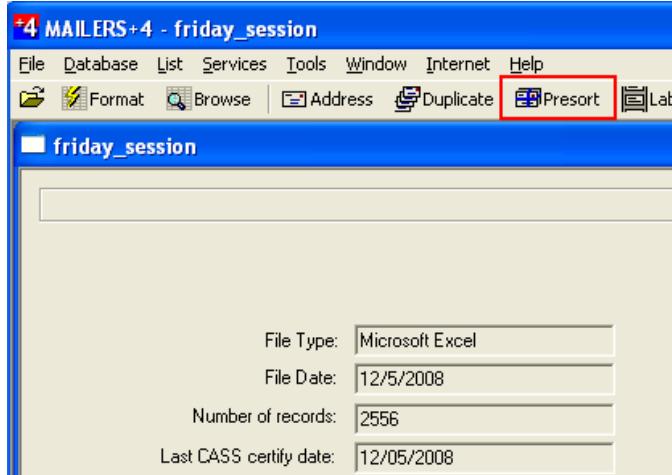
Either select a template that you have previously saved, or accept the default "New Mailing" option and click "Next."

Enter KIRKSVILLE, MO, and 63501 in the appropriate boxes. Check the "Save as default" box, and click "Next."


For a bulk rate mailing, select "Standard" as the Mail Class (USPS refers to bulk mail as standard). Select either "Letter/Card" or "Flat" as the Mail Piece Type (check with the mailroom if you are unsure which to choose). For Rate Type, most offices will choose "Non-profit" (The Index is one known exception). Click "Next."
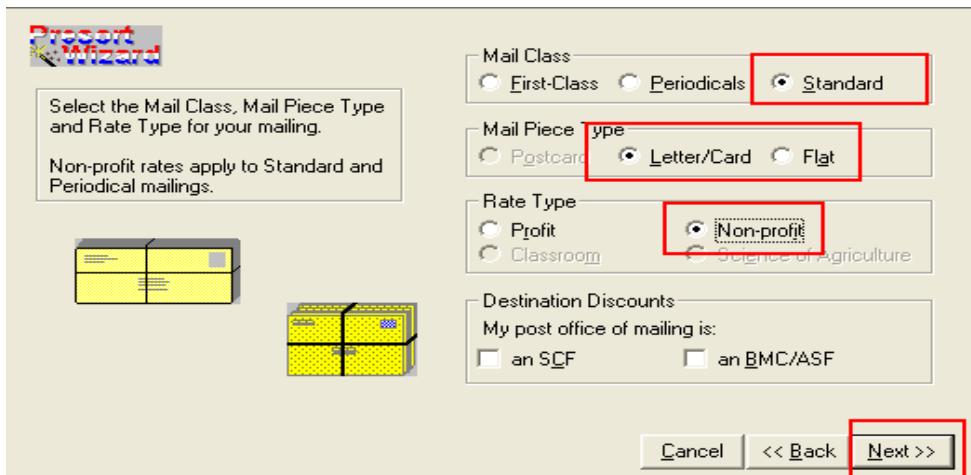
Before completing this next page, you will need to supply a 10 piece sample of your mailing to the mailroom. The sample will be weighed and they will give you the values you need to complete this section. **THE VALUES SHOWN HERE ARE JUST EXAMPLES, NOT VALUES YOU WILL USE FOR YOUR MAILING.**
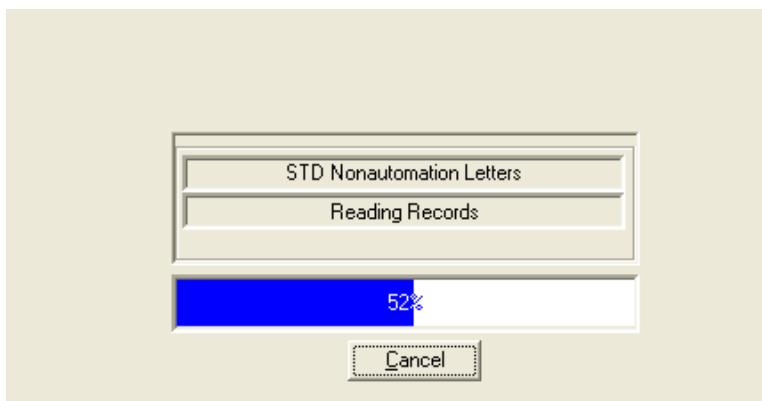
Enter the values provided by the mailroom in the appropriate boxes and click "Next."
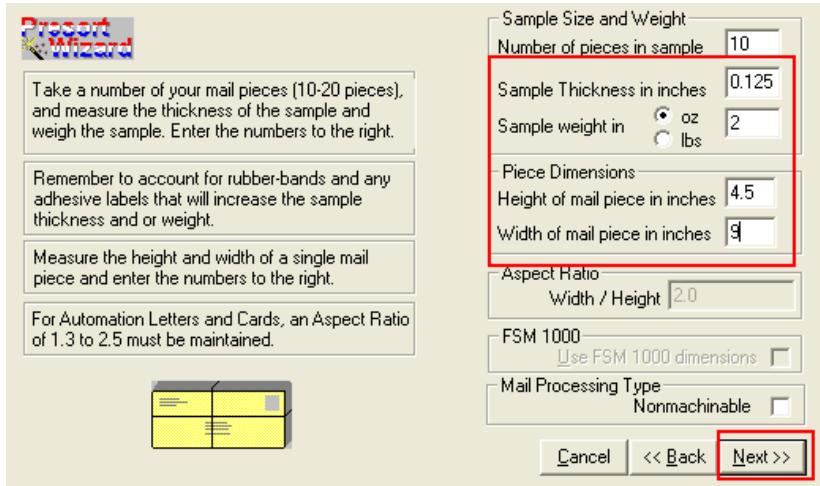
On the Suggest Mailing form that appears, you need to uncheck the first box labeled "STD Automation Letters-Cards." The University does not have the machinery required to prepare this type of mailing. Click "Go."
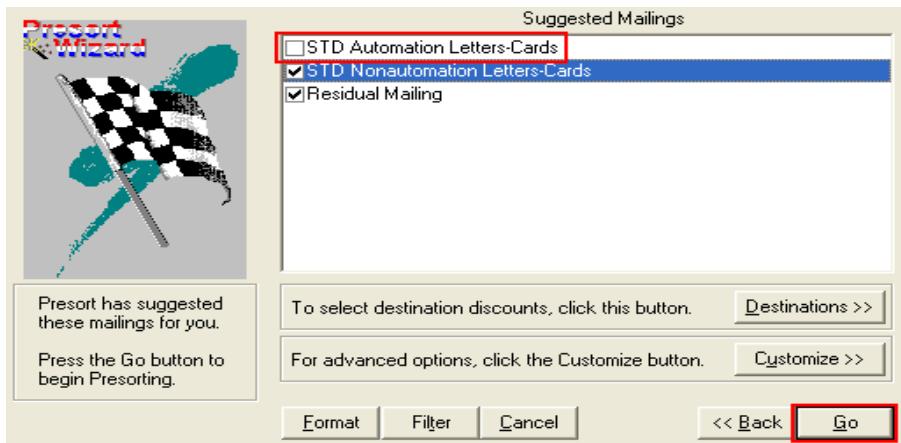
A few screens like this one will flash by as your addresses are processed…..

… and you will come to the Results Screen which will hopefully show that all the pieces of your mailing qualify for the STD Nonautomation rate. Click "Next" to proceed.

One more form will pop up and require that you enter your name and University information (again, be sure to check the "Save as default" so you'll not have to repeat this step in the future). Be sure to enter "4" as Truman's Permit#. In the Payment section, choose "Imprint" if your mailing pieces have preprinted postage information already on them (where the stamp would be located). Choose "Meter" if the mailroom has to add this postage information to your mailing. Click "Next."
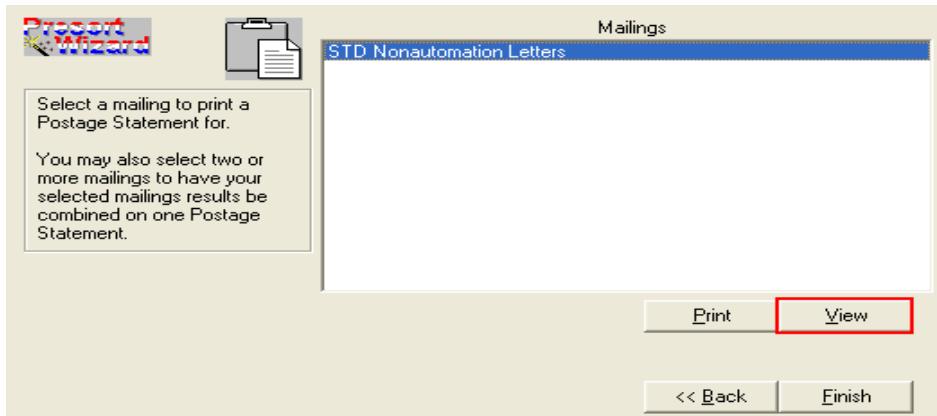
When you reach the "Mailings" screen, click "Postage Report."

On the next page, click "View."

Your 10 page Postage Report will open in Adobe. You will <u>always need to print the first page</u> of this report, but only the subsequent pages that contain the sections marked on the "Parts Competed" line need to be included.

<u>In this example</u> only section "D" is marked on the "Parts Completed" line. Scrolling through the document, you find that Section D is on page 4. You would only need to print pages 1 & 4 to send to the mailroom.

United States Postal Service

Postage Statement — Nonprofit Standard Mail

Post Office: Note Mail Arrival Date & Time

Mailer

Permit Holder's Name and Address and Email Address, If Any
YOUR NAME HERE
Truman University
100 E Normal Ave
Kirksville, MO 63501

USPS Nonprofit Auth. No._____
CAPS Cust. Ref. No. _____
Customer No. _____

Telephone

Name and Address of Mailing Agent *(If other than permit holder)*

Customer No. _____

Telephone

Name and Address of Individual or Organization for Which Mailing Is Prepared *(If other than permit holder)*

USPS Nonprofit Auth. No. _____
Customer No. _____

Mailing

| Post Office of Mailing | KIRKSVILLE MO 63501 |
| Type of Postage | ☐ Permit Imprint ☐ Precanceled Stamps ☒ Metered |

Processing Category
☒ Letters ☐ CMM
☐ Flats ☐ NFM
☐ Parcels - Machinable
☐ Parcels - Irregular
☐ Letters - Paid as NFMs
☐ ECR Letters - Paid as ECR Flats

Mailing Date 12/5/2008

Weight of a Single Piece

0 . 0 1 2 5 pounds

Federal Agency Cost Code

Statement Seq. No.

Total Pieces 2556

Total Weight 31.9500

No. and type of Containers
___ Sacks
7 1 ft. Letter Trays
1 2 ft. LetterTrays
___ EMM Letter Trays
___ Flat Trays
___ Pallets
___ Other

Permit # 4

For Mail Enclosed within Another Class
☐ Bound Printed Matter ☐ Library Mail ☐ Media Mail ☐ Parcel Post ☐ Periodicals

If Sacked, Based on ☒ 125 pcs ☐ 15 lbs. ☐ both

For Automation Price Pieces, Enter Date of Address Matching and Coding
___ ___ / ___ ___ / ___ ___ ___ ___

For Enhanced Carrier Route Price Pieces, Enter Date of Address Matching and Coding
___ ___ / ___ ___ / ___ ___ ___ ___

For Enhanced Carrier Route Price Pieces, Enter Date of Carrier Route Sequencing
___ ___ / ___ ___ / ___ ___ ___ ___

Move Update method:
☐ Ancillary service endorsement ☐ FASTforward ☐ NCOALink ☐ ACS ☐ Alternative method ☐ Multiple

Parts Completed *(Select all that apply)* ☐ A ☐ B ☐ C ☒ D ☐ E ☐ F ☐ G ☐ H ☐ I ☐ J ☐ K ☐ L ☐ S

Total Postage *(Add parts totals)* 410.676

Postage

Price at Which Postage Affixed *(Check one)* ☐ Correct ☒ Lowest ☐ Neither

2556 pcs. x $ 0.160 = **Postage Affixed** 408.960

Net Postage Due *(Subtract postage affixed from total postage)* 1.72

For USPS Use Only: Additional Postage Payment *(State reason)*
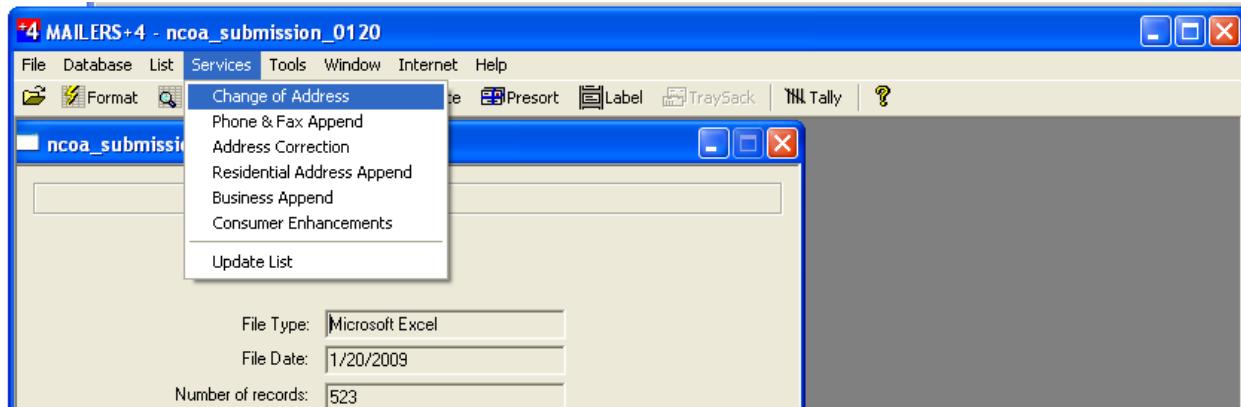
Sample from page 4 of the Postage Report.

☒ **Part D**
Nonautomation Letters

Check box at left if prices are populated in this section.

Machinable Letters *3.3 oz. (0.2063 lbs.) or less*

	Entry	Price Category	Price	No. of Pieces	Total
D1	None	AADC	$0.160	1698	271.680
D2	None	Mixed AADC	0.162	858	138.996
D3	DBMC	AADC	0.127		
D4	DBMC	Mixed AADC	0.129		
D5	DSCF	AADC	0.118		

Nonmachinable Letters *3.3 oz. (0.2063 lbs.) or less*

	Entry	Price Category	Price	No. of Pieces	Total
D6	None	5-Digit	$0.245		
D7	None	3-Digit	0.340		
D8	None	ADC	0.363		
D9	None	Mixed ADC	0.463		
D10	DBMC	5-Digit	0.212		
D11	DBMC	3-Digit	0.307		
D12	DBMC	ADC	0.330		
D13	DBMC	Mixed ADC	0.430		
D14	DSCF	5-Digit	0.203		
D15	DSCF	3-Digit	0.298		
D16	DSCF	ADC	0.321		

Part D Total 410.676

Submitting data file for NCOA (National Change of Address) update.

Launch Mailers+4 software, navigate to and open your spreadsheet as you normally would.
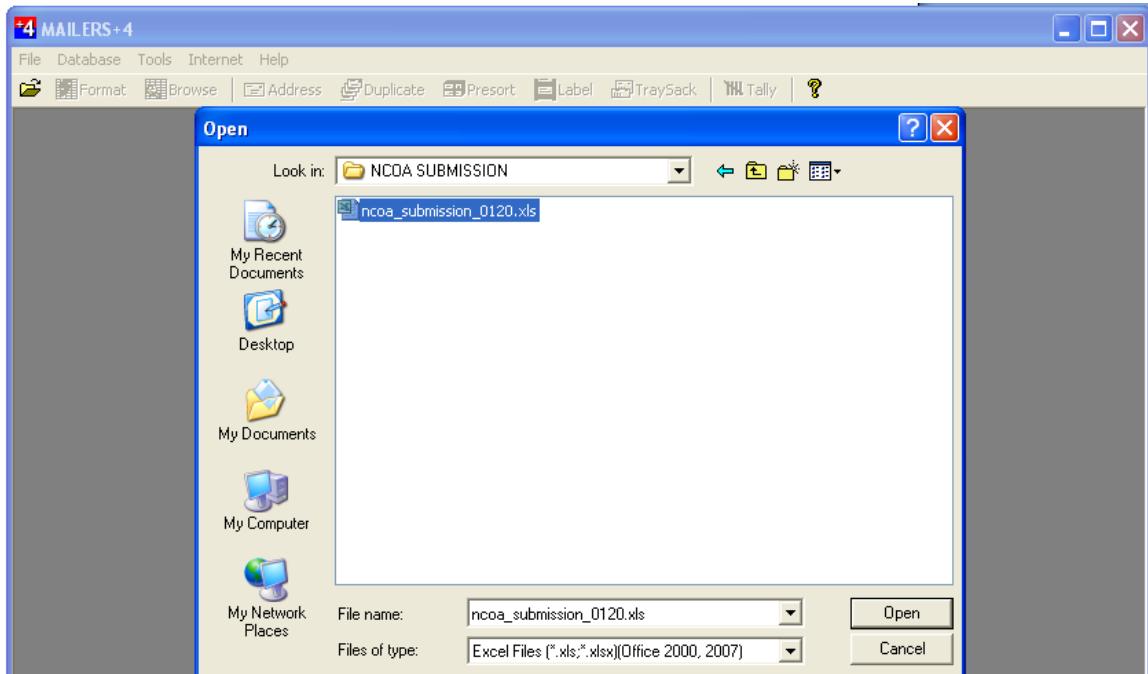
Click Services at the top of the screen and then choose Change of Address from the drop-down menu.

Select "Change of Address" in the list that appears, then click Next.

Choose the service option you desire.

Supply your contact information and click Next.

Supply payment information and click Next.
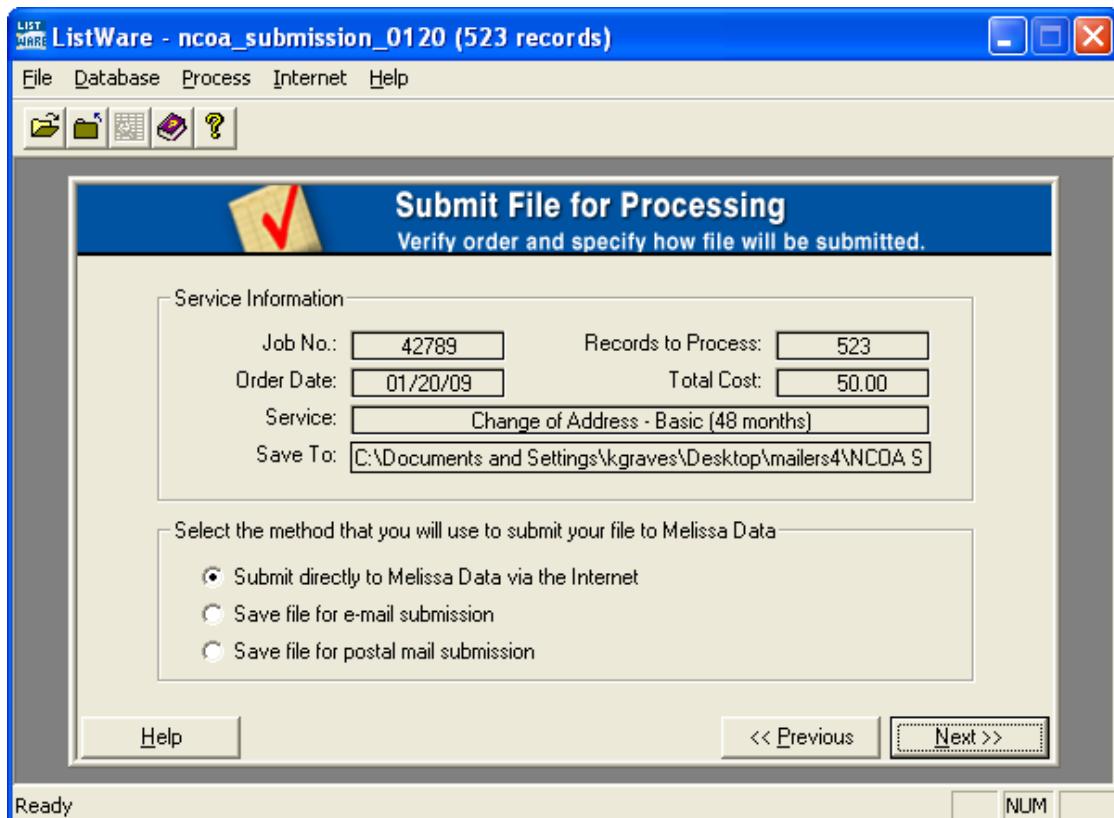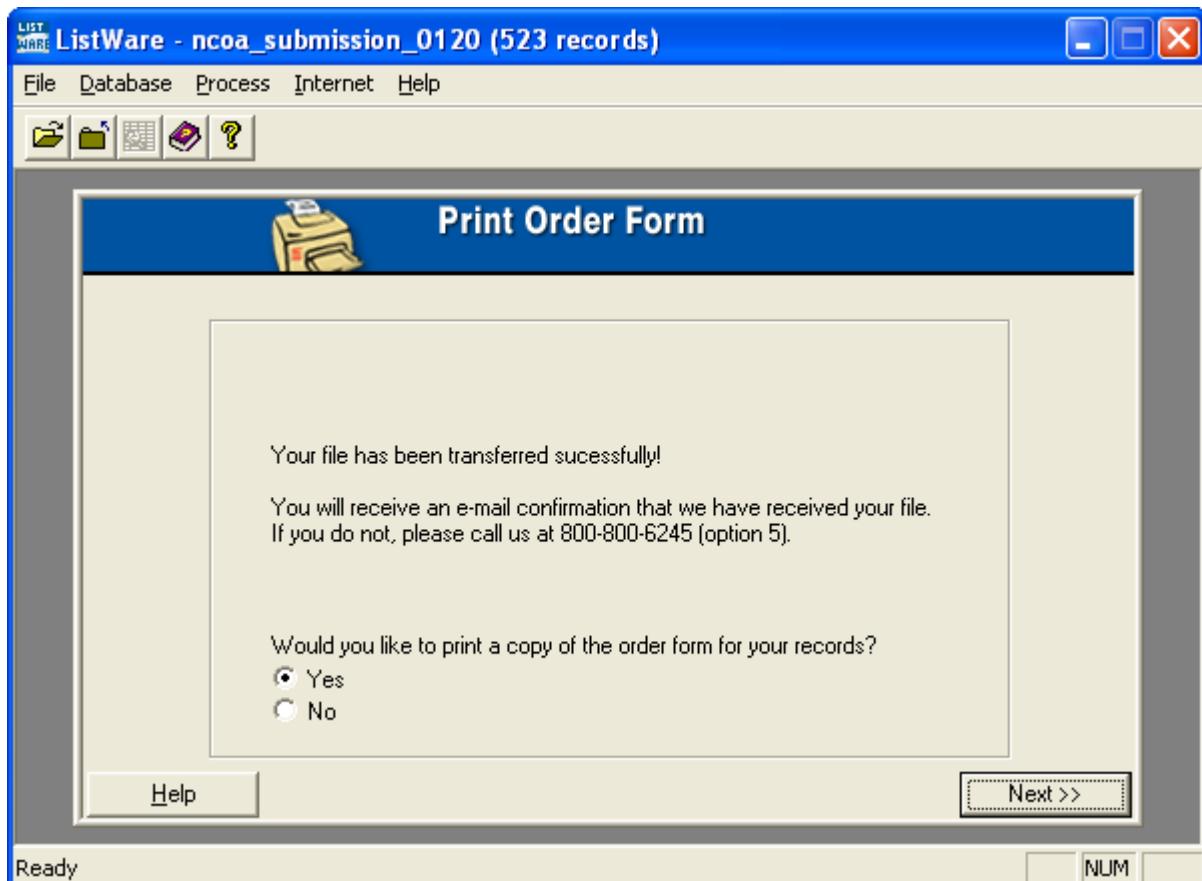
Format data columns and click Next.
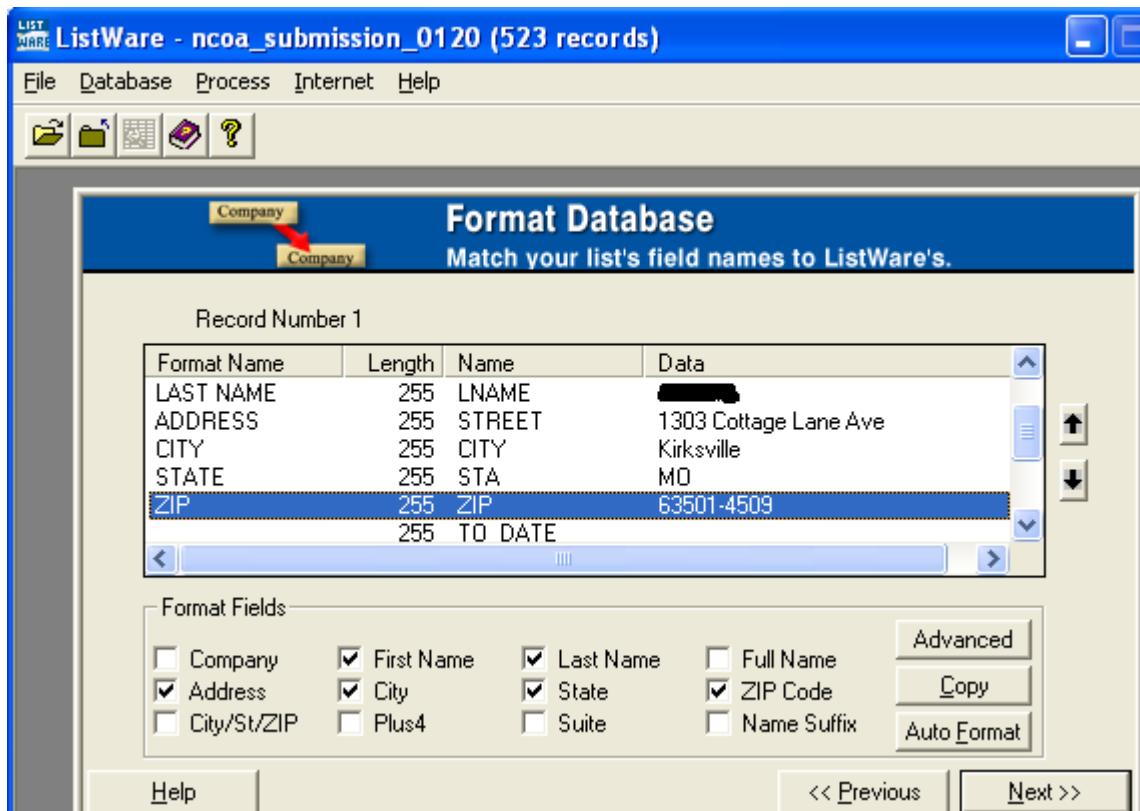
Verify information and click Next.

When file is successfully uploaded you will get a confirmation screen. Select Yes and click Next.


After printing your invoice you will have the option to print a copy of the acknowledgement form.

(Print Acknowledgement Form - No screenshot available)

I must have missed hitting PrintScreen on this page. If someone goes through this process and emails me a screenshot of this page I'll add it to the documentation. If not, I'll update the documentation the next time I have occasion to submit a file to NCOA.   -Kasey

After your file is processed, you will receive an email containing an update file with a .DES extension. You need to save this file locally on your pc. This example shows how (if you use Outlook) you can simply right-click on the attached file and choose "Save As…"

Remember where you save this file; you will need it a few steps from now. Saving in it the same location as your spreadsheet of addresses is one suggestion.
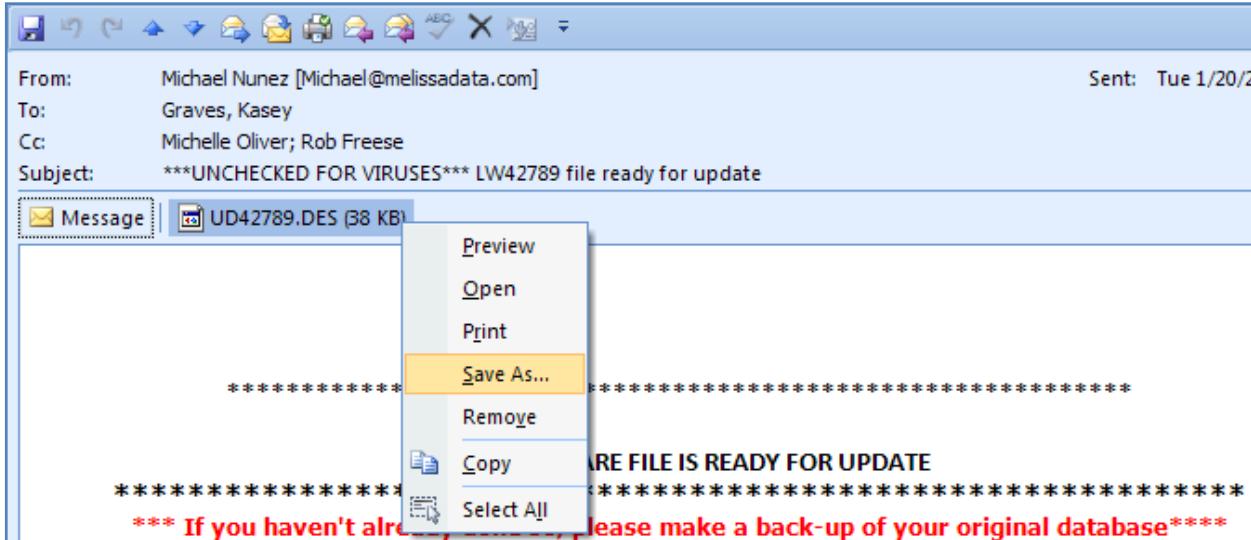

Before continuing you should CREATE A BACKUP COPY OF YOUR SPREADSHEET OF ADDRESSES. The process that follows will update your records in place and not leave a copy of the previous record. Without a copy you will not be able to reference or restore the previous record.
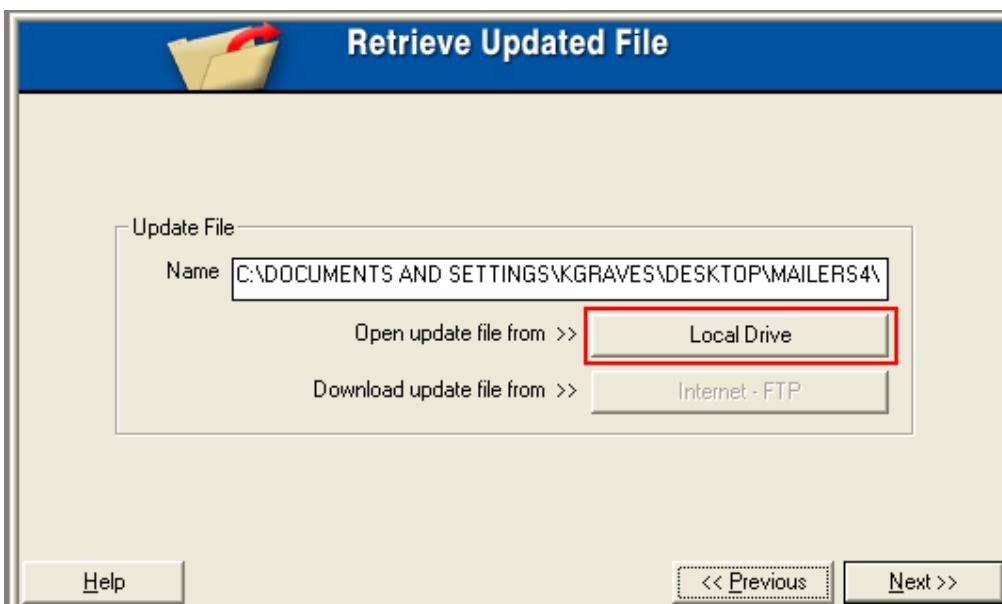
Open your address spreadsheet using Mailers+4 and select Services and then Update List.
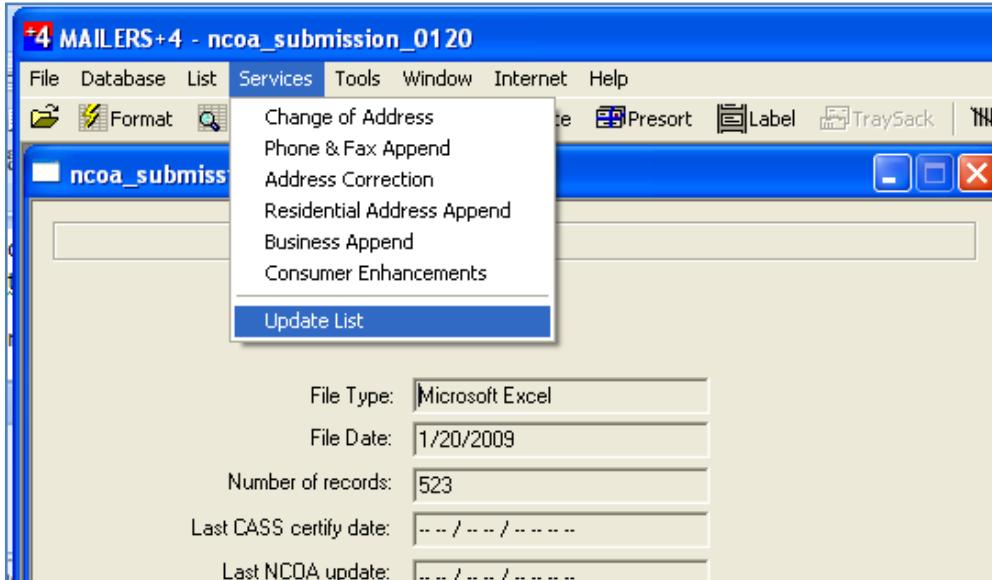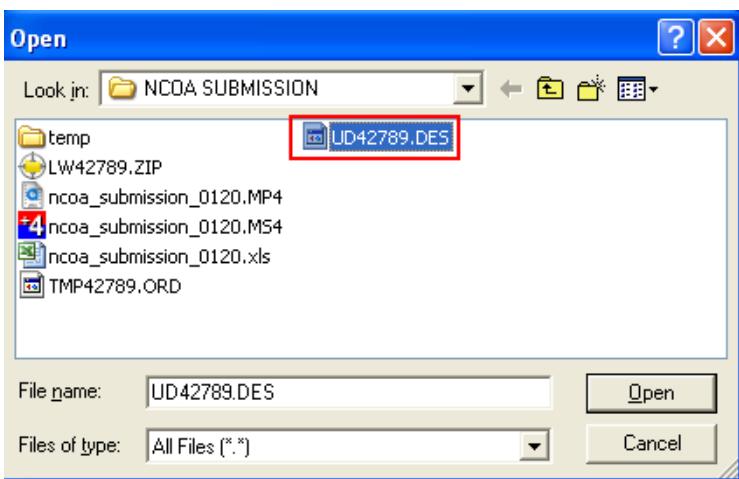
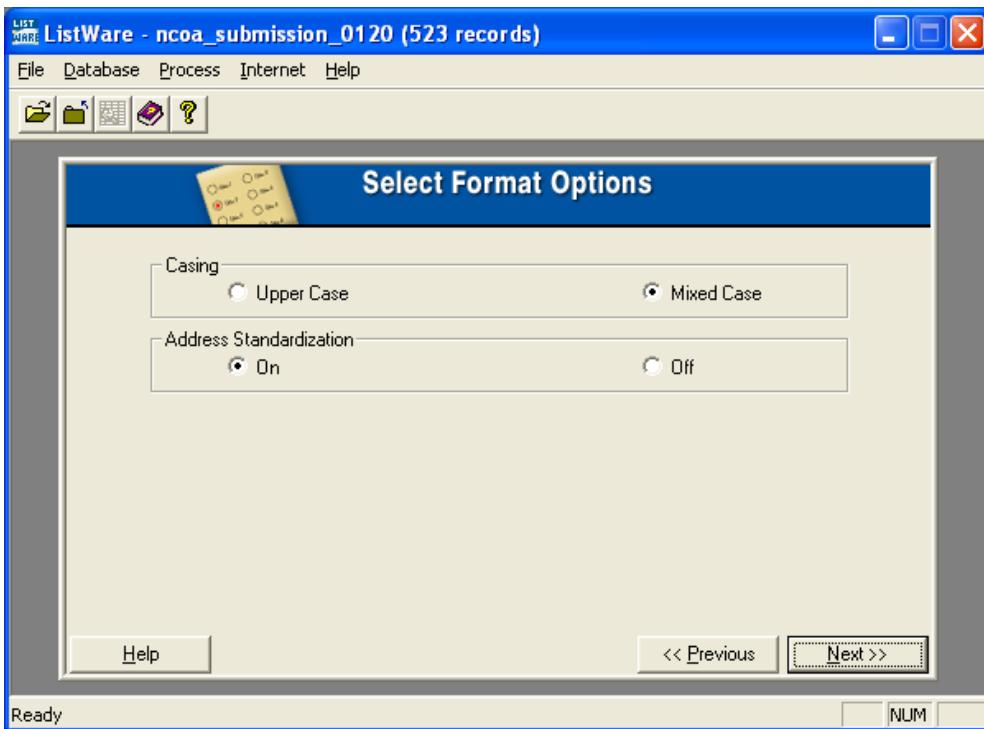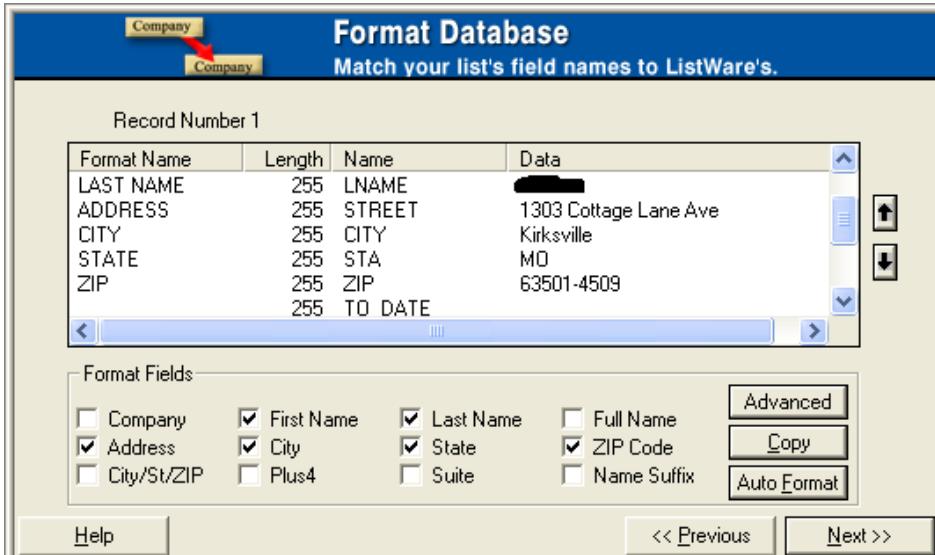You should see this screen and click Next.
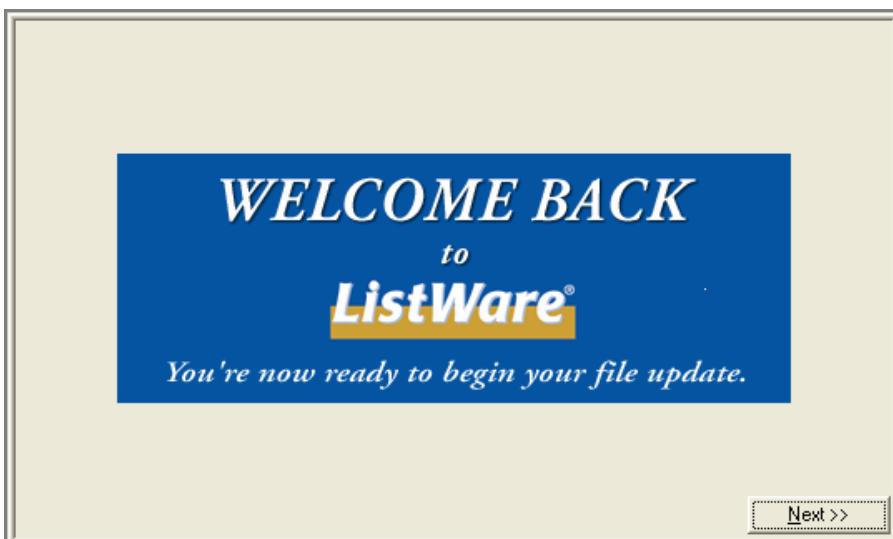
Click on Local Drive.

Browse to the .DES file you were emailed and click Open, and then click Next.

Select format options and click next.

Format (or verify) data columns and click Next.

At this point, you may be prompted with a list of columns that you have not mapped. You can either return to your spreadsheet and add empty columns with appropriate headers to map, or click Ignore. These are extra columns of data that are provided by NCOA. You can choose to use or ignore this data.

Your file will be updated and a screen will show how many records were processed and how many were actually updated. Select Yes to print the detailed report and click Next. This will print a CASS Summary Report and a LISTWARE Change of Address Report.
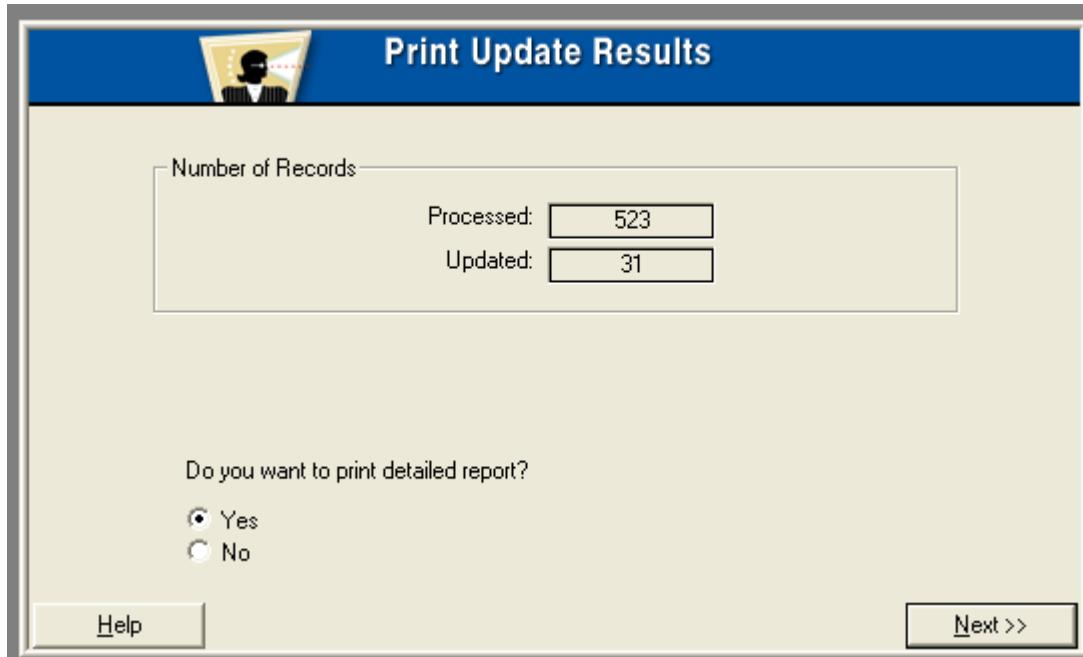
Business and Accountancy
Violette Hall 2400
100 East Normal
Kirksville, MO 63501-4221
ADDRESS SERVICE REQUESTED

RETURN SERVICE REQUESTED

Must have
at least
1/4
inch
clearance

Non-Profit Organization
U.S. Postage
PAID
Kirksville, MO
Permit No. 4

ADDRESS SERVICE REQUESTED

Stephanie Powelson, EdD, Director
OR CURRENT RESIDENT
Truman State University
Department of Nursing
100 East Normal Barnett Hall 223A
Kirksville, MO 63501-0828

SAMPLE