# 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. <u>ALWAYS SORT YOUR SPREADSHEET BY ZIP BEFORE BEGINNING.</u>



Opening the spreadsheet produces this window showing the type of file and number of records it contains.

200_verifiable		
<b>E</b> 1 <b>T</b>		
File Type:	Microsoft Excel	
File Date:	11/19/2008	
Number of records:	200	
Last CASS certify date:	//	
Last NCOA update:	/	

Next click on the "Format" button ....

<b>*4</b> N	4 MAILERS+4 - 200_verifiable										
Eile	<u>D</u> atabase	<u>L</u> ist <u>S</u> ervi	ces <u>T</u> ools	<u>W</u> indow	Internet	<u>H</u> elp					
<b>2</b>	💋 Format	🔍 Brows	e 🛛 🖃 Ad	dress 🔮	Duplicate	📳 Presort	<b>E</b> Label	E			
	200_verif	iable									

...which will open a window that shows your column header names and displays the first record in your file.

🔲 Format	Fields - 2	200_ve	rifiable	2						
Address	DupCheck	Presort	Phone	Na	ame Parse   Geo	Cod	e ACS	Input Sr	nart Mo	ver 💶 🕨
Format Na	ame	Length	Name		Data					~
		255	Last Nan	ne	Doe					
		255 255 255 255	First Nam Street1 City ST	ne	John 100 E N Goshen KY	orma	lAve			
Format O	otions									
Comp	any	🗌 🗌 Cjt	у		Plus <u>4</u>		DPB <u>C</u> heck	Digit	🗌 Ful	Na <u>m</u> e
🗌 🗖 Delive	ery <u>A</u> ddress	_ <u></u> <u>S</u> ta	ate		Address <u>2</u>		C <u>r</u> rt		🗌 Las	s <u>t</u> Name
🛛 🗖 S <u>u</u> ite		∏ _IF	-	Γ	Address <u>E</u> rror	Γ	Urbanizati <u>o</u>	n	🗌 Firs	t <u>N</u> ame
🛛 🗖 Privat	e Mailbo <u>x</u>	🗌 Ci <u>t</u>	y/St/ZIP	Г	<u>D</u> elivery Point	Γ	LACS		🗌 ZIF	+4/DP <u>B</u>
	7	E LA	.CSLin <u>k</u> R	eturr	n Code					
Auto <u>F</u> orn	nat C	Сору	Adyar	nced				<u>o</u> k		<u>C</u> ancel

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.

🔲 Format Fiel	ds - 200_verifiabl	e2						
Address Dup( Record Number:	Check Presort Phon	e Name Parse G	eoCode ACS Input	: Smart Mover 💶 🕨				
Format Name	Length Name	Data		<u>^</u>				
255         First Name         John           ADDRESS         255         Street1         100 E Normal Ave           CITY         255         City         Goshen           STATE         255         ST         KY           ZIP         15         Zip         40026.000000								
Format Options ☐ Company ☑ Delivery <u>A</u> d	✓ Cjty dress     ✓ State     ✓ ZIP	Plus <u>4</u> Address <u>2</u>	DPB <u>C</u> heck Digit	Full Name				
Private Mail	lie _ir Ibo <u>x</u> ☐ City/St/ZIF ☐ LACSLin <u>k</u>	P Delivery Poin Return Code	t 🗍 LACS	ZIP+4/DP <u>B</u>				
(Auto Eormat)	Copy Ady	anced	<u>0</u> K	<u>C</u> ancel				

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.

🔲 Format Fields - 3	200_verifiable2	2		
Address DupCheck Record Number: 1	Presort Phone	Name Parse Geo	oCode ACS Input S	Smart Mover 💶 🕨
Format Name	Length Name	Data		<u>^</u>
	255 First Nam	e John		
	255 Street Lin	e 1 100 E N	lormal Ave	
CITY	255 City	Goshen		
STATE	255 ST	KY		
) ZIP	15 Zip	40026.0	100000	×
Format Options				
Company	🔽 City	Plus 4	DPB Check Digit	Full Name
Delivery Address	✓ State	Address 2		Last Name
☐ Suite	ZIP	Address Error	Urbanization	First Name
Private Mailbox	⊂ ⊑ □ Citu/St/ZIP	Deliveru Point		
		here Code		211 44701 0
	LACSLIN <u>K</u> Re	eturn Lode		
Auto <u>F</u> ormat	Copy Ad <u>v</u> an	ced	<u>0</u> K	<u>C</u> ancel

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.

Format Fields - sample									
Address DupCheo Record Number: 1	ck Presor	t Phone N	lame Pa	rse GeoCode ACS Inp					
Format Name	Length	Name		Data					
CITY	255	City		Goshen					
STATE	255	ST		KY					
ZIP	15	Zio		40026.000000					
ADDRESS ERR	255	ADDERR							
Format Options									
Company	🔽 Ci	ty 🔽	Plus 4	1 🗖 DPB Check Dic					

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.

File	<u>D</u> atabase	List	<u>S</u> ervices	<u>T</u> ools	<u>W</u> ind	ow	Internet	Help	
<b>2</b>	🐓 Format	Q	Browse	🖃 Ada	dress	Ģ	Duplicate	📳 Presort	ELabe
s s	ample								
			F	File Type:	: Mic	rosa	ft Excel		1
			F	File Diate:	11/	/19/:	2008		]
			Number of	records:	200	)			1

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.

🔲 Address Check Options - sample	
Processing Options Skip previously coded records Use USPS Preferred City Names Combine <u>R</u> ange and Address field	Casing Auto Upper/Lower Upper Upper Convert Company Field To All Caps Do not case the name field
Address Standardization           Never           Only On Coded Records           Always	On Address Errors ✓ Clear Existing PLUS4's ✓ Clear Existing CRRT'S ✓ Delete Unresolved dBase Records
Print 1 🗧 Copies Printer \\\krypton\Co	omputer Services
Save Settings As Default Download latest <u>E</u> WS file	Days Until Database Expiration United States: 73 day(s) Canada: 0 day(s)
Eormat Filter	<u>Cancel</u>

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.

Address Check	Results - sar	nple		
Record Counts – Coded Ca <u>nada Coded</u> Error Count	Total 198 9 0 2	<u>x</u> 9 x 0 x 1 x	Coded Address Information	Streets Highrises Firms PO Boxes Rural Routes Gen. Deliveries
Error List Report	Print			
<u>R</u> esolve Address	es CASS (	Form 3553)	Split List	Close

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.

+4 MAILERS+4 - [Address Check Results - 2	00_verifiable2]			
File Database List Services Tools Window	Internet Help			- 8
🖆 🎆 Format 🗱 Browse 📄 Address 🖉 Du	uplicate 📰 Presort 📄 Label 🚟 TraySack 🛛 🚻 Ta	Ny   <b>8</b>		
Rec No. Address	City	State	ZIP	Error
69 1206 N Centennial Street	Kirkavood	мо		U
70 1304 N Centennial Street	Kinkawood	MO		U
				>
Ignore Bange/Suite Errors				
		Pessive		Close
Error Type: Unknown Street		Hesolve		Finze

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.

4 MAILERS+4 - [	Resolv	e Ada	iresses -	200_v	erifiable2								
<u>F</u> ile <u>D</u> atabase	List S	ervices	; <u>T</u> ools	<u>W</u> indow	Internet j	<u>H</u> elp							- 6
🚰 📕 Format 📓	Browse	e   E	Z Address	<i>臣</i> Dup	olicate 😑	Presort	E Labe	i 🖅 T	raySack	<b>THL</b> Tally	?		
- Original Info							⊢ Edit I	nfo					
- Optional:								Address	1206 N C	entennial Str	eet		
Name: Company: Address:	Name: John Doe Company: Address: 1206 N Centennial Street City Kirkwood												
City: State: Error Type:	Address: 1206 N Centennial Street City: Kirkwood <u>State: M0</u> ZIP+4: Error Type: U - Unknown Street							State	MO	ZIP	<u> </u>		
Range	o/e	Dir	Street N	ame	ZIP+4	Suite	,	Compa	ny				
<u> </u>	<u>S</u> ea	arch In	Range		Search <u>O</u> u	ut of Rang	je		<u>R</u> eplace	e		<u>C</u> ancel	

To fix this, simply type in the correct information and click the "Replace" button.

*4 MAILERS+4 · Eile Database	E <b>[Resolv</b> E List S	e Ad ervice:	<mark>Iresses - 200_ve</mark> s <u>T</u> ools <u>W</u> indow	rifiable2] Internet Hel	p sort Ellabs	- Finan TravSack	YNU TAILY   9	,
Original Info Option Nam Compan Addres Cit Stat Error Typ	al: e: John E w: s: 1206 N w: Kirkwo e: MO e: U - Un	loe I Centr od knowr	ennial Street ZIP+4: Street		Edit I	nfo Address   1206 N City   Kirksvi State   MD	I Centennial Stree	63501
Range	o/e	Dir	Street Name	ZIP+4	Suite	Company		
	<u>S</u> e	arch In	Range	Search <u>O</u> ut o	f Range	<u>R</u> epl	ace	<u>C</u> ancel

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.

<mark>*4</mark> м	AILERS+4	- [Resolve Address	ses - 200_ve	rifiable2]							
E	ile <u>D</u> ataba	ise <u>L</u> ist <u>S</u> ervices <u>T</u> o	ols <u>W</u> indow	<u>I</u> nternet <u>H</u> elp						-	ć
<b>2</b>	Format	Browse 🖃 Add	iress 🖉 Dupli	icate 🔠 Presort	E Label	F TraySack	1111. Taliy 🥛 🍞				
R	ec No.	Ad	ldress			City		State	ZIP	Error	]
	69 120	16 N Centennial St		Kirks	wille			MO			
	70 130	)4 N Centennial Street		Kinta	vood			MO		U	
										×	
										<u> </u>	l
	Ignore F	Range/Suite Errors									
_	-						Γ	Besolve		Close	1
En	or Type:	Unknown Street					L	<u>11</u> 030146		0000	

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.

🔲 Address Chec	k Results - 200_ve	rifiable2	
Record Counts Coded Canada Coded Error Count	70tal _ % 200 100 % 0 0 % 0 0 %	Coded Address Information	Streets Highrises Firms PO Boxes Rural Routes Gen. Deliveries
Error List Report	Print SSES	553)	Close

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."

⊢B1 . List F	B1 . List Processor's Name							
	YOUR NAME HERE							
D2.Nam	D2 . Name and Address of Mailer							
Name	Truman State University							
Company	Truman State University							
Address	100 E Normal Ave							
City	Kirksville State M0 ZIP 63501-4200							
<u>D</u> K <u>C</u> ASS Preview     CASS <u>Print</u>								

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

200_verifiable2	
File Type:	Microsoft Excel
File Date:	11/20/2008
Number of records:	200
Last CASS certify date:	11/20/2008
Last NCOA update:	/

Your spreadsheet should now contain only clean addresses. At this point you could 1.) exit Mailers+4, <u>\*resort your</u> <u>spreadsheet by zip code</u> 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."

🔲 Select Templa	te - friday_session		
<b>Respect</b>	Select from a template of previous mailings for this presort. Or select the ''{-New Mailing)'' template to create a new presort.	Saved Templatee {New Mailing}	<u>N</u> ext >>

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

Post Office of mailing: Enter the City, State and ZIP Code of the post office, where you will be taking your mailing.	Post Office of mailing City KIRKSVILLE State MO ZIP+4 63501 .
	Cancel (C Back Next 22)

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."

Select the Mail Class, Mail Piece Type and Rate Type for your mailing. Non-profit rates apply to Standard and Periodical mailings.	Mail Class <u>First-Class</u> <u>Periodicals</u> <u>Standard</u> Mail Piece <u>Postcare</u> <u>Letter/Card</u> <u>Flat</u> Rate Type <u>Profit</u> <u>Non-profit</u> <u>Classroom</u> <u>Scence of Agriculture</u> Destination Discounts My post office of mailing is:
	an SCF an BMC/ASF
	<u>Cancel</u> << <u>B</u> ack <u>N</u> ext >>

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."

Preport	Sample Size and Weight				
Wilzard	Number of pieces in sample 10				
Take a number of your mail pieces (10-20 pieces),	Sample Thickness in inches 0.125				
and measure the thickness of the sample and	Sample weight in 0 oz 2				
weigh the sample. Enter the numbers to the right.	C lbs				
Remember to account for rubber-bands and any	Piece Dimensions				
adhesive labels that will increase the sample	Height of mail piece in inches 4.5				
thickness and or weight.	Width of mail piece in inches 9				
Measure the height and width of a single mail piece and enter the numbers to the right.	Aspect Hatio Width / Height 2.0				
For Automation Letters and Cards, an Aspect Hatio	FSM 1000				
of 1.3 to 2.5 must be maintained.	Use FSM 1000 dimensions				
	Mail Processing Type Nonmachinable				
	Cancel << Back 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."

Presort	Suggested Mailings
🔍 Mizard 🛛 👝	STD Automation Letters-Cards
	✓ STD Nonautomation Letters-Cards
	☑ Residual Mailing
Presort has suggested these mailings for you.	To select destination discounts, click this button.
Press the Go button to begin Presorting.	For advanced options, click the Customize button.
	<u>F</u> ormat Fil <u>t</u> er <u>C</u> ancel << <u>B</u> ack <u>G</u> o

A few screens like this one will flash by as your addresses are processed.....

F		
	STD Nonautomation Letters	
	Reading Records	
	52%	
	<u>Cancel</u>	

... 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.

Pressit	Mailing Results					
< Wizard	Mailing	Containers	Packages	Pieces	Amount	
	STD Nonautomation Letters	8	195	2556	410.678	
	***None Qualified*** Residual	0	0	0	0.000	
This is a summary of your mailings.						
Press the <u>N</u> ext button to set up postage statement information.						
	Total pieces 2556	Total cost	410.678	Savings	662.842	
	Any mailing identified by ***None Qualified***         Indicates that the mailing did not have enough pieces to create a valid mailing.					

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."

Postage Statement Information - friday_session							
	Permit Holder	Prepared	For	– Mailing Ager	nt		
Name:	YOUR NAME HERE						
Company:	Truman University						
Address:	100 E Normal Ave						
City:	Kirksville						
State:	State: MO ZIP: 63501		ZIP:				
Phone:							
Email:			1				
Permit #:	4						
Additiona	Information		Payment	Interint C. Ct.			
Seq. #	Mail Date	12/5/2008		Turbuur S 20	amp jour		
Agency Co	ode Receipt #		✓ Save as defe	ault			
Customer ‡	CAPS/CTAS		<< <u>B</u> ack	<u>N</u> ext>>	<u>F</u> inish		

When you reach the "Mailings" screen, click "Postage Report."

Bresent	Mailings			
Select a mailing from the listbox and use the Radio buttons below to select which report to Print. View or	STD Nonautomation Letters			
Export.           Qualification Report              •             Mailing Summary             Presort Parameters             Compute Listing				
Bundle Report C Container Report C	Print View Export			
	<< <u>B</u> ack Postage <u>Report &gt;&gt;</u> <u>F</u> inish			

### On the next page, click "View."

Presert	<u> </u>		Mailings	:	
		O Nonautomation Letters			
Select a mailing to print Postage Statement for. You may also select tw more mailings to have y selected mailings result combined on one Post Statement.	ta oor your is be age				
				<u>P</u> rint	⊻iew
				<< <u>B</u> ack	<u>F</u> inish

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.

Uni Po	ited States Postal Service Ostage Statement —	Post Office: Note I	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 Kirkøville, MO 63501		Name and Address of Mailing Agent (If other than permit holder)		Name and Address of Individual or Organization for Which Mailing Is Prepared (If other than permit holder)	
	USPS Nonprofit Auth. No. CAPS Cust. Ref. No.		Customer No.		USPS Nonprofit Aut	th. No
-	Post Office KIRKSVILLE MO Processi of Mailing 63501 III Let	ing Category	Mailing Date 12/5/2008	Federal Agency Cost Code	Statement Seq. No.	No. and type of Containers
5	Type of Permit Imprint Pa Postage Precanceled Stamps Pa EXMetered EC	ats NFM arcels - Machinable arcels - Irregular etters - Pald as NFMs CR Letters - Pald as ECR Flats	Total Pieces	Sacks <u>7</u> 1 ft. Letter Trays <u>1</u> 2 ft. Letter Trays EMM Letter Trays Flat Trays		
Aailin	Permit # For Mail	Enclosed within Another Cl d Printed Matter Ubrary Mail	ass Periodicais	Total Weight	Pallets Other	
2	For Automation Price Pieces, Enter Date of Address For Enhanced Carrier Route Price Pieces, Enter Date of Matching and Coding Address Matching Address Matching and Coding Address Matching A					Pieces, Enter Date of
	Move Update method:					
	Parts Completed (Select all that apply)	АВ		=GHI	јј 🗌 к 🗌 Г 🗌	s
	Total Postage (Add parts totals) 410.676					
e	Price at Which Postage Affixed ( <i>Check one</i> ) Correct XLowest Neither <u>2556 pcs. x</u> 0. <u>160</u> = <b>Postage Affixed</b>					08.960
stag	Net Postage Due (Subtract postage affixed from total postage)				ie)	1.72
P d	For USPS Use Only: Additional Postage Payment (State reacon)					

Sample from page 4 of the Postage Report.

x	Part D         Check box at left if prices are populated in this section.           Nonautomation Letters         Check box at left if prices are populated in this section.				
Mach	ninable Let	ters 3.3 oz. (0.206	3 lbs.) or les	5	
	Entry	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		
Nonr	nachinable	e Letters 3.3 oz. (0	).2063 lbs.) o	r less	
	Entry	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.

4 MAILERS+4	
File Database Tools Internet Help	
🚰 🖬 Format 👹 Browse 🖃 Address 🖉 Duplicate 🖽 Presort 📄 Label 🔝 TraySack	1991 1992 1992 1992 1992 1992 1992 1992
Open	? 🛛
Look in: 🔁 NCOA SUBMISSION 🗨	← 🛍 📸 💷 -
My Pecent Documents My Documents My Documents My Computer	
My Network File name: ncoa_submission_0120.xls Filaces Files of type: Excel Files (* vlo* vlov)(0)filea 2000	Open     Cancel

Click Services at the top of the screen and then choose Change of Address from the drop-down menu.

*4 MAILERS+4 - ncoa_submission_0120	
File Database List Services Tools Window Int	rnet Help
😂 💋 Format 🔍 Change of Address	e 🎛 Presort 🛱 Label 🚟 TraySack 🛛 1111. Tally 🦻
Phone & Fax Append Address Correction Residential Address Append Business Append Consumer Enhancements	
Update List	
File Type: Microsoft Exc File Date: 1/20/2009	el
Number of records: 523	

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

the second	ListWare	Enhancement Services			
Select	a service category to view o	description and possible service combinations.			
۰	Change of Address	C Address Correction			
C Phone & Fax Append C Residential Address Append					
C Business Append C Consumer Enhancements					
0	C Duplicate Check C Area Code Update				
For ser please	vices and combinations not call 800-800-6245	offered through ListWare, or for assistance,			
<u>H</u> elp		<< <u>P</u> revious	<u>N</u> ext>>		

Choose the service option you desire.

The second se	Change of Address Choose the exact service you want performed.
C Basic (24 months) Basic (48 months) Advanced Premium Service Decemination	\$40.00 \$50.00 \$100.00 \$200.00
Basic: LACS, NCOA Updates records v that have moved i Matches addresse Now using NCOAI CASS certifies and	Link, CASS (48 months) with new addresses of Businesses, Families, and Individuals n the last 4 years and filed a change of address with the USPS. es to NCOA (National Change of Address) database. Link technology. d standardizes file to USPS specs. Form 3553 provided.
Help	<< Previous Next >>

Supply your contact information and click Next.

	Provide Co	ntact Inforn	mation	
Company	Truman State University			
Name*	YOUR NAME GOES HERE			
Address*	100 E Normal Ave			
City*	Kirksville	State* MO Z	ZIP* 63501	
E-mail*	YOUR EMAIL ADDRESS	Customer	No.	
Phone*	YOUR PHONE NUMBER HERE	Fax		
				*Required
<u>H</u> elp			<< <u>P</u> revious	<u>N</u> ext>>

Supply payment information and click Next.

Provide Payment Information
C Company Purchase Order
VISA     O C American Express
C 🥽 Master Card C 📻 Discover
Card No.
Exp. Date (mm/yy)
Name on card
Billing ZIP Code
Special Instructions
Help <<< Previous <u>N</u> ext >>

Format data columns and click Next.

MAR LI	istWa	re - ncoa_subn	nission_01	20 (523	records)				
<u>F</u> ile	<u>D</u> atab	ase <u>P</u> rocess <u>I</u> nt	ernet <u>H</u> elp						
1		0							
		Company		Format	Datab	ase			
		Com	pany	Match yo	ur list's f	ield names	to ListW	are's.	
		Record Numb	per 1						
		Format Name	Length	Name		Data			<u>~</u>
		LAST NAME	255	LNAME					
		ADDRESS	255	STREET		1303 Cottage	e Lane Ave		
		STATE	200 255	STA		NIKSVIIIE MO			<b>-</b>
		ZIP	255	ZIP		63501-4509			
			255	TO DATE					▼
		<						>	
		Format Fields							
		Company	E. Eisek Ma		l		Mana	Advanced	I I
		Company	First Na	me I⊻	Clast Mame		Name Codo	Conv	
		Citu/St/ZIP	Plus4		Suite	I♥ ZIF	coue ne Suffix		
		Cigrotizii	1 1004	,	ouro	, , , , , , , , , , , , , , , , , , , ,	io o unin	Auto Forma	<u>s</u>
		<u>H</u> elp					<< <u>P</u> revi	ous 📃	<u>N</u> ext>>

Verify information and click Next.

🚟 ListWare - ncoa_submission_0120 (523 records)
<u>Eile D</u> atabase Process Internet <u>H</u> elp
Submit File for Processing
Verify order and specify how file will be submitted.
Service Information
Job No.: 42789 Records to Process: 523
Order Date: 01/20/09 Total Cost: 50.00
Service: Change of Address - Basic (48 months)
Save To: [C:\Documents and Settings\kgraves\Desktop\mailers4\NCDA S]
Select the method that you will use to submit your file to Melissa Data
Submit directly to Melissa Data via the Internet
C Save file for e-mail submission
C Save file for postal mail submission
Help     << Previous
Ready

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.

📕 🤊 (*) 🔺 🗢 😂 🖨 😂 🏟	🄊 🗙 👳 🔻	
From: Michael Nunez [Michael@meliss To: Graves, Kasey	adata.com]	Sent: Tue 1/20/
Cc: Michelle Oliver; Rob Freese Subject: ***UNCHECKED FOR VIRUSE	S*** LW42789 fi	le ready for update
Message UD42789.DES (38 KB)	<u>P</u> review	]
	<u>O</u> pen	
******	Save As	*******
	Remo <u>v</u> e	
**************************************	Select A <u>l</u> l	<pre>we file is ready for update ************************************</pre>

Before continuing you should CREATE <u>A BACKUP COPY OF YOUR SPREADSHEET OF ADDRESSES</u>. 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.

•	4 1	AAILERS+4	- no	:oa_subn	nissior	n_0120						
Г	File	Database	List	Services	Tools	Window	Interne	t	Help			
	È	🐓 Format	Q,	Change	e of Add	dress		е	🕄 Presort	<b>E</b> Label	FT TraySack	<b>۲</b> ۲۲
8				Phone	& Fax A	Append						
		ncoa_sub	miss	Addres	s Corre	ction						${}$
				Reside	ntial Ad	dress App	end 🛛					
d				Busines	ss Appe	nd						
ł				Consur	ner Enh	ancement	5					
r				Update	List							
				Fi	le Type:	: Microso	oft Excel			1		
1				Fi	le Date:	1/20/2	009			1		
				Number of i	records:	523				1		
			Last	CASS certi	ify date:	/	/					
			L	ast NCOA	update:							

You should see this screen and click Next.



Click on Local Drive.

	Retrieve Updated	l File
Update File —		
Name C.	DOCUMENTS AND SETTINGS\KGF	AVES\DESKTOP\MAILERS4\
	Open undate file from	Level Dive
	open update me nom >>	Local Drive
	Download update file from >>	Internet - FTP
<u>H</u> elp		<< <u>Previous</u> <u>N</u> ext >>

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

Open		? 🗙
Look jn: [	) NCOA SUBMISSION 📃 🔶 🖻 📸 🗉	<b>≣ -</b>
LW42789. LW42789. ncoa_subr ncoa_subr ncoa_subr ncoa_subr m TMP42789	.ZIP mission_0120.MP4 mission_0120.M54 mission_0120.xls 9.ORD	
File <u>n</u> ame:	UD42789.DES	<u>)</u> pen
Files of type:	All Files (*.*)	ancel

Select format options and click next.

tist ListWare - no	:oa_submission_0	120 (523 records)	
<u>File D</u> atabase <u>P</u> r	ocess <u>I</u> nternet <u>H</u> elp	)	
🖻 🖬 📓 🧶	8		
		Select Format Options	
C	Casing C Upper Case	Mixed Case	
A	ddress Standardization	C Off	
Help		<< <u>P</u> revious	st >>
Ready			NUM

Format (or verify) data columns and click Next.

Company	FC Company Ma	ormat Datab atch your list's	) <b>3SE</b> field names to ListWar	e's.
Record N	lumber 1			
Format Name	e Length N	ame	Data	~
LAST NAME ADDRESS CITY STATE ZIP	255 L 255 S 255 C 255 S 255 Z	NAME TREET ITY TA IP	1303 Cottage Lane Ave Kirksville M0 63501-4509	
<	255 T	O DATE		
Format Field Company ✓ Address City/St/Z	s ▼ First Name ▼ City P ■ Plus4	I Last Nam I State I Suite	e ☐ Full Name ✓ ZIP Code ☐ Name Suffix 7	Advanced <u>C</u> opy Auto <u>F</u> ormat
<u>H</u> elp			<< <u>P</u> reviou	s <u>N</u> ext>>

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.

	Print Update Results
- Numbe	er of Records Processed: 523 Updated: 31
Doyu @Y @N	ou want to print detailed report? ′es lo
Help	<u>N</u> ext >>

Sample Envelope:Bus & Acct #10 postage paid 1/16/09 1:34 PM Page 1



And<br/>ityBusiness and Accountancy<br/>Violette Hall 2400<br/>100 East Normal<br/>Kirksville, MO 63501-4221ADDRESS SERVICE REQUESTED



### RETURN SERVICE REQUESTED Must have 1/4 inch

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