How to prepare **Saturation Mail** with

MAILERS⁺4 ®

MELISSA**DATA**®

How to Prepare **Saturation Mail** using MAILERS+4

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Trademarks

Welcome to Direct-Mail Marketing with MAILERS+4

Saturation mailing gets you the lowest postage rate because of the discounts for sharing the workload. When you do some of the processing and sorting, it saves the Postal Service time and money. They pass those savings on to you in the form of postage discounts. A standard letter can be mailed for as little as 12¢ per piece. Non-profit organizations save even more.

You can also save money by dropping your mailing at the postal facility handling the delivery. To save the most in postage, deposit the mailing with the Destination Delivery Unit (DDU), the local post office that services the addresses being targeted by your mailing..

Saturation mailing is targeted toward addresses in the same neighborhood. Specifically, a saturation mailing is directed toward addresses in the same postal carrier route.

In addition to the significant cost savings, this makes saturation mail ideal for local businesses to direct their advertising to nearby residents. Businesses such as delivery services, restaurants and auto repair shops can send out discount coupons to raise awareness of their services.

Qualification Types
- ✓ Sales or promotional messages
- ✓ Form letters
- ✓ At least 200 sorted and addressed pieces (or 50 lbs.), all the same size, shape and weight.

Rules
- ✓ Saturation: Mailing sent to 75% of all addresses or 90% of residential addresses within a single carrier route.
- ✓ High Density: Mailing sent to 125 or more addresses within a single carrier route.
- ✓ Mailpieces sorted in walk sequence.
- ✓ Mailpieces weigh less than 16 oz.
- ✓ No Personal letters
- ✓ No Bills, invoices or statements
- ✓ No Contracts
- ✓ No Valuables or currency

Additional Resources
QSG 240d, 340c, 703

The best results are obtained by targeting carrier routes within 2 to 5 miles of the location you are advertising.

This manual provides you with a checklist of the steps necessary to process a mailing for the Saturation Mail discounts possible using MAILERS+4. It includes a list of important elements required to get you started as a direct mailer, from mailpiece design for postal automation compatibility, to properly packaging the mailpieces in their containers and taking them to the post office.

Good luck with your direct-mail marketing initiative. If you need further assistance, please call on our customer service or technical support staff at 1-800-MELISSA.

Saturation mailing is based on the "carrier route" which is the area serviced by a single postal carrier. To qualify for saturation postage rates, a mailing must be in walk sequence order and sent to at least 75% of all addresses in a carrier route or 90% of the residential addresses in the route. For example, if a carrier delivers to 500 addresses, 400 of which were residences, your saturation mailing would have to reach 375 out of all addresses (75% of 500) or 360 residential addresses (90% of 400).

To qualify for high density postage, the mailing must be in walk sequence order and reach 125 addresses in a carrier route, regardless of the total number of addresses in the route.

If a carrier route has fewer than 165 addresses, the High Density minimum of 125 addresses would also qualify for Saturation rates, therefore Saturation rates should always be used for these carrier routes.

To qualify for either saturation or high density postage rates, a list must have Walk Sequence numbers.

The Walk Sequence number indicates the order in which a carrier delivers to addresses on his route. This number must be attached to every record and updated every 90 days. You can have this added to your list with DSF^2 processing, or you can also purchase an occupant list with the Walk Sequence numbers from Melissa Data. See Step 3 for more details about obtaining a mailing list with Walk Sequence numbers.

MAILERS+4 offers you a double benefit: it is a powerful program that processes your mailing for the best discounts possible; it enhances your database for an efficient, successful direct marketing campaign.

For more information about how much you can save by using saturation mailing with MAILERS+4, visit:

http://www.melissadata.com/saturation
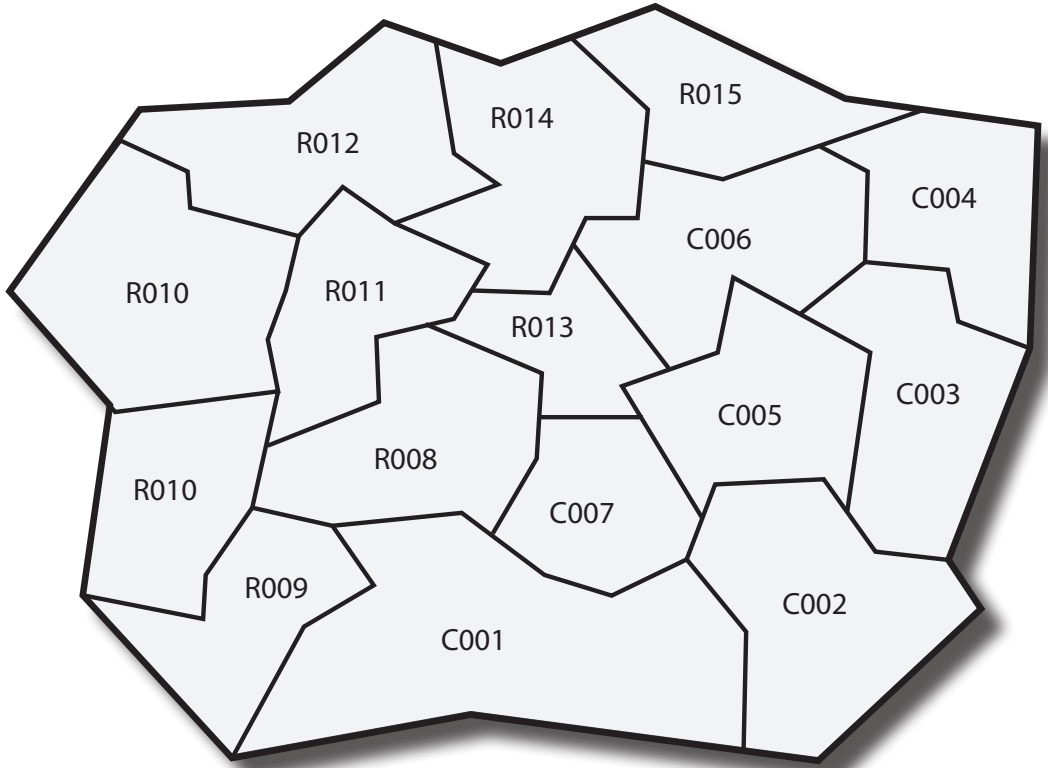
This drawing represents how a ZIP Code is divided into carrier routes.

Step 1 — What You Need to Get Started

Checklist:

☐ Obtain a Bulk Mail Permit from your local post office.

☐ Determine payment type and obtain authorization from the post office.

☐ Get materials and supplies from the post office, including rubber bands, trays and sleeves.

☐ Purchase tie straps.

☐ Pick up any books or pamphlets including the Quick Service Guide (Pub 95).

☐ Obtain a mailing list or sales leads that target your market.

Obtain a Bulk Mail Permit

You must have a valid mailing permit before you can mail at presorted postage rates. You'll pay a fee when you apply and when you renew the permit every 12 months. Your post office can tell you how much the fee is.

Payment Types and Requirements

	Form 3615 (Yearly Fee)	Other Fees	Other Forms
Stamps	X		
Imprint	X	X	
Meter	X		3601-A

Determine Payment Type

Precanceled Stamps

If you want your mailing to look more personalized, use precanceled stamps.

Meter

Using a postage meter is a convenient way to pay for postage. Meters are leased from authorized manufacturers.
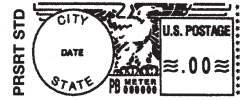
Imprint

You can have permit imprint information— called an indicia–printed in the upper right corner of the mailpiece.

```
PRSRT STD
AUTO
U.S. POSTAGE PAID
NEW YORK, NY
PERMIT NO. 1
```

Database Files

To process a mailing using MAILERS+4, you will need a database file. To meet the requirements for Saturation mailing discounts, the database must contain at least 90% of the residential addresses (for a residential-only mailing) or at least 75% of all addresses for a residential and business mailing.

If you do not currently have a database that meets the Saturation mailing qualifications, your best option would be to purchase a list from Melissa Data. Call 1-800-ME-LISSA (635-4772) or visit www.MelissaData.com/Lists and click *Occupant Mailing Lists*.

Step 2 — Designing Your Mailpiece

Checklist
- ☐ Verify your mailpiece qualifies for automation compatibility.
- ☐ Measure your mailpiece to determine if it qualifies for letter or flat rates.

The size of your mailpiece will determine the rates available to you. The major processing categories of Standard Mail (A) include letters or cards and flats. All the pieces in your mailing must be the same size, shape, and weight.

## Making Your Mailpiece Automation Compatible

Making your mailpiece automation-compatible is important. Automated equipment can process mail quickly and more efficiently than manual operations can, allowing the Postal Service to set lower rates for these pieces and increase delivery time.

Your automation-compatible mailpiece should:
- ✓ Meet size and weight standards.
- ✓ Be made of good quality white or light-colored paper.
- ✓ Contain no sharp items including staples.
- ✓ Contain no bulky items larger than 1/4" thick.
- ✓ Be sealed securely with wafer tabs if applicable.
- ✓ Be readable by automation equipment.

How to Measure Your Mailpiece

The length is the edge that runs parallel to the lines of the delivery address. The height is the perpendicular edge.
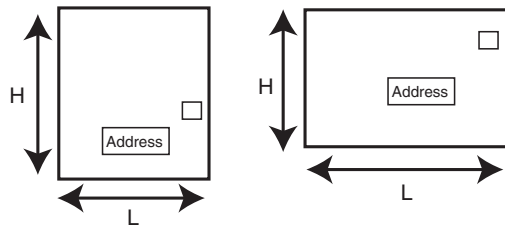
Letters

Although the post office allows letter mail to be a maximum of 11.5" in length, to ensure accurate and efficient processing, the USPS recommends your letter size mailpiece be less than 10.5" in length.

Flats

For the maximum automation discount, flat pieces should be no larger than 12" high by 15" long.

Minimum and Maximum Sizes

Be aware of the differences between letter mail and flat mail, and check with the USPS regarding the differences in postage rates. For example, if you design a newsletter as an 8.5 x 11" piece, then you will pay flat rates. If you fold the newsletter in half as an 8.5 x 5" self-mailer, you will pay lower letter rates. This booklet will describe how to process and mail letter size pieces in more detail.

Letters

6-1/8"

3-1/2"

5"

0 — 11-1/2"

Flats

12"

6-1/8"

11-1/2"

0 — 15"
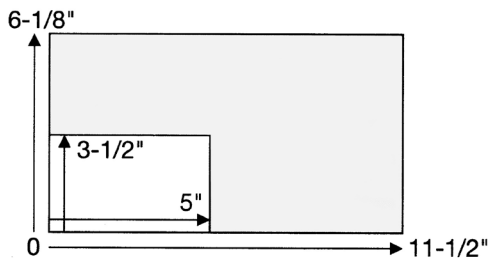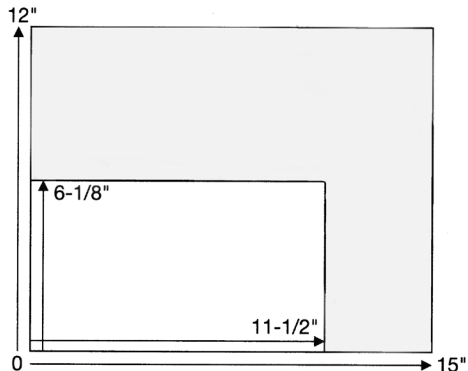
	Min	Max
Length:	5"	11 1/2"
Height:	3 1/2"	6 1/8"
Thickness:	0.007"	0.25"
Weight:	up to 3.5 ounces. Some restrictions apply, verify with your post office.	

Automation letters must maintain an aspect ratio (height ÷ width) between 1.3 and 2.5.

	Min	Max
Length:	11 1/2"	15"
Height:	6 1/8"	12"
Thickness:	0.25"	0.75"
Weight:	less than 13 ounces	

One dimension must exceed at least one of the letter-size minimums.

Step 3 — Preparing a List for Saturation Mailing

Checklist

☐ Acquire a certified occupant mailing list, or…

☐ Have Walk Sequence numbers appended to the records in your mailing list

Acquiring an Occupant Mailing List for Walk Sequence

It is rare that mailing lists that built up via existing customer relationships will contain the necessary 75% of addresses within a given carrier route to qualify for saturation mailing. More likely, it will be necessary to buy a list from Melissa Data. You can purchase a list by calling 1-800-MELISSA (635-4772) or by visiting www.MelissaData.com/Lists on the web.

Buying Occupant Mailing Lists over the Web

1. Point your web browser at *www.MelissaData.com/Occupant*.
2. Alternatively, from inside MAILERS+4, click on the Internet menu and click **Order Occupant Lists Online**.
3. To target addresses within a given distance of your location, select Radius and enter the maximum number of miles (Again two to five miles are usually ideal for saturation mailing and the address, city, state and ZIP Code of your location).
4. Alternatively to receive all carrier routes with a single ZIP Code, select **ZIP Code** and enter the five-digit ZIP that you want to target.

5. Under **Check to Include**, select the types of addresses to include in your occupant list. To meet the minimum requirements of a saturation mailing, you should leave all boxes checked. You can also check the box to **Include Names Where Available** but this is not required for saturation mailing.
6. Click **Add Selection**. The web page will display a summary of the list to be purchased, including the number of addresses included.
7. To purchase only some of the carrier routes within the selected radius, click **Carrier Route(s)** and uncheck the carrier routes that you don't want. Click *C*onfirm and Return to My List to finish.
8. Click **Next Step**. The web page will display the cost of the selected occupant list and a list of available file formats. dBase (*.dbf) is the best for working within MAILERS+4 (although the others will work).
9. Select the desired format and click *Next Step*.
10. Enter a job name. This will allow you to retrieve the same settings to purchase an updated list in the future.
11. Click **Check Out**.
12. The web page will display your shopping cart. Verify that the information is correct and click **Check Out**.
13. Enter your shipping address and click **Continue**.
14. Enter your billing information and click **Submit Order**.

After processing your order and compiling the occupant list, the web page will display a gray *Download* button. Click this to download your new database.

Your occupant list must be used within 90 days of purchase. After 90 days, you must purchase an updated list.

Using Your Own Mailing Lists for Walk Sequence

To use your own mailing list, your database must contain enough addresses to meet the requirement of 75% of all addresses or 90% of residential addresses in a given carrier route.

DSF Processing

In order to use your list for saturation mailing, the database must have Walk Sequence numbers appended to each record. This is called DSF[2] processing.

You can send your list to Melissa Data for DSF[2] processing. Call 1-800-MELISSA (635-4772) to speak to our Data Enhancement Services department or visit *www.MelissaData.com/DSF* for more information.

Your list must be used within 90 days after it is returned to you from processing.

Using MAILERS+4 to Determine If Your Mailing List Qualifies for Saturation Mailing

1. Select **List > Tally…**
2. Check **Carrier Route**
3. If your mailing list covers a large geographic area, you should consider using a filter to limit the tally to the ZIP to be targeted by your saturation mailing. See the MAILERS+4 User's Guide for more information on using filters.
4. Click **Go**.
5. After MAILERS+4 finishes the tally, it will display the **Print/Preview** dialog.
6. Select **Carrier Route** and click **Preview** or **Print**.
7. The report will show the number of addresses in your database compared with the number of possible addresses, broken down by carrier route.

CASS Report 3553

8

Step 4 — Presorting For Postal Discounts

Checklist

- ☐ Measure and weigh your mailpiece and enter in the correct data in the Presort Wizard.
- ☐ Select the appropriate presort categories to sort to.

Sortation Categories

You can receive a larger discount on postage if you share the work of processing the mail. When you do some of the preparation and sortation, it saves the Postal Service time and money and they pass the savings on to you.

To receive automation rates, addresses must be CASS verified, have a ZIP + 4 Code, and labels must be barcoded.

To receive non-automation rates, addresses must have a valid 5-digit ZIP Code, presorted packages must be rubberbanded, and addresses do not need to be CASS processed.

Miscellaneous pieces are known as residuals when the addresses have an invalid ZIP Code, no ZIP at all, or have international addresses.

Presort For Postal Discounts Using MAILERS+4

1. Click the Presort button.
2. Select **{– New Mailing –}** and click **Next >>**.
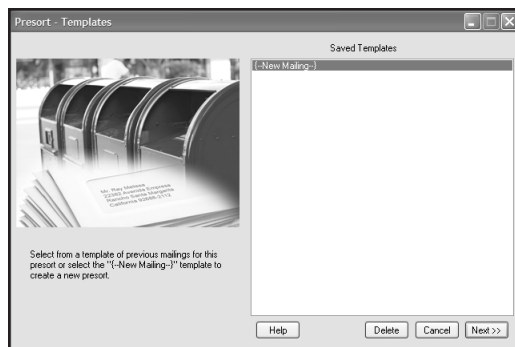
3. Fill in **Post Office of Mailing** information. (This is where you obtained your bulk permit.) You should check **Save as Default** if this is the primary post office you use for bulk mailings.
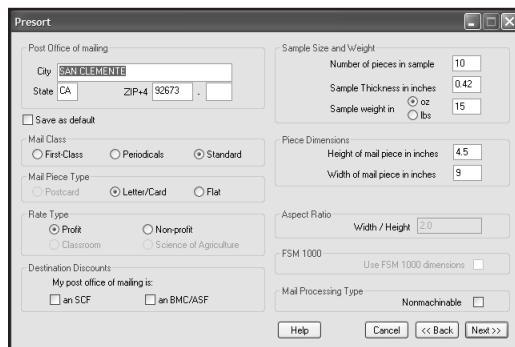
How do I accurately measure my mailpiece?

1. Take 10-20 assembled mailpieces (including labels, inserts, and rubberbands) and flatten them by hand and release.

2. Measure the height of the stack to the nearest 1/8 inch and enter this amount as the thickness.

3. Weigh the same 10 pieces to the nearest 0.0001 pound or 0.1 ounce and enter this amount as the weight.

4. Enter in the height and width of the piece.

5. MAILERS+4 will do the calculations per piece and enter this information on the postage statement.

4. Mark your selections for **Mail Class**, **Mail Piece Type** and **Rate Type**.

5. The information you place in the **Sample Size and Weight** screen is very important for accurate tray sortations and weight rates. Enter the information as accurately as possible and choose **Next >>**.

6. Complete the Postage Statement Information including the permit holder and payment type. Click **Next >>**.

7. The *Suggested Mailings* listing will show you what Presort levels your list may qualify for, and what levels it will attempt to sort to, in descending order from the lowest rate. Saturation mailings require the "Enhanced CRRT WS/HD/LOT Letters" presort level.

8. To select destination discounts, click **Destinations >>** and select the BMC, SCF or DDU that you plan to use for this mailing. Remember, DDU rates are not available for letters and cards.

9. To add a DDU, click **Edit DDUs**, then click **New** and enter the city, state and ZIP code for the new DDU.

10. Click **Format**, then click **Autoformat**. Verify that Carrier Route and Walk Sequence are formatted. Click **OK**.

Entry Levels

Where you actually deposit your mailing has a big impact on the level of saturation discounts that you receive. The closer you can your mailpiece to its destination before turning it over to the post office, the lower the postage.

The following explains the difference between entry levels, listed in descending order of cost.

Post Office of Mailing – These rates apply if you drop your mailing with the Post Office that issued your bulk mail permit.

Network Distribution Center (NDC) Entry – A BMC is a centralized, highly mechanized mail processing planet for distributing Standard Mail in bulk form.

Sectional Center Facility (SCF) Entry – An SCF is a postal facility that serves as a processing and distribution center for post offices in a geographic area defined by the first three digits of the ZIP. Some SCFs serve more than one such area.

Destination Delivery Unit (DDU) Entry – A DDU is the local postal facility that directly serves a delivery address. DDU Entry provides the lowest mailing cost possible. To qualify for this rate, you deposit your sorted and prepared mailpieces directly at the DDU that serves the area that you are targeting with your mailing. This discount is only available for flats.

Step 5 — Forms You'll Need to Take to the Post Office

Checklist

☐ Review the Qualification Report and Postage Statement and make a copy for your records.

☐ Prepare to pay the amount of postage due on the Postage Statement.

☐ Sign the Postage Statement certifying you are in accordance with all USPS rules and regulations.
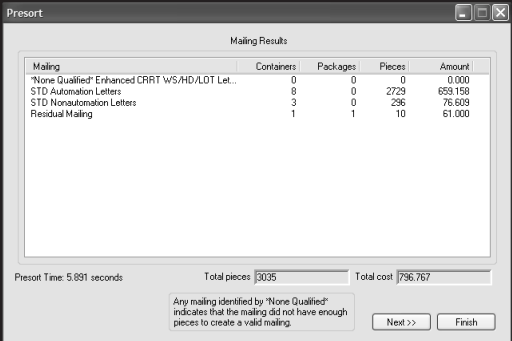
Postal Forms and Reports

Documentation must be generated by PAVE certified software like MAILERS+4. PAVE certified by the USPS means MAILERS+4 meets the standard of excellence for presort software. Certification at the Gold level is your guarantee that MAILERS+4 surpassed the standard qualification criteria for presorting and accuracy that includes Standard Mail, FirstClass, and Periodicals.

Printing Postal Forms Using MAILERS+4

After running Presort, the **Mailing Results Summary** screen will show you the following:

- The rate levels your mailing qualified for after presorting.

- The number of pieces and cost at each rate.

- Your **Total Cost and Savings** of the mailing compared to single piece First-Class postage. Click **Next >>**.

1. Print the Qualification Report for all of the presorted mailings listed. Highlight one mailing at a time (ie: STD Automation Letters), select **Qualification Report** and click **Print**.

2. Select **Postage Report >>**, highlight all qualified mailings that you want to mail and then **Print** to get the required Postage Statement.

3. Click **Finish**.

Automation Qualification Report

```
Report: USPS Qualification Report
Entry: San Clemente, CA 92674
 Sort: Standard Mail, DMM 345.6
 File: 86786968.dbf
MAILERS+4 (Build 1764)

Sack   Sack     Sack      Pkg            Rates
 #     Lvl      ZIP       Dest     WS       HD      CR

 1     CR5S     92672   92674 B001    48
                        92674 B001    26
                        92674 B002    48
                        92674 B002    43
                        92674 B002    10
                        92674 B003    48
                        92674 B003    44
                        92674 B004    48
                        92674 B004    22
                        92674 B005    33
                        92674 B006    48
                        92674 B006    22
                        92674 B008    33
                        92674 B008    48
                        92674 B008    23
                        92674 B009    48
```

Note: The *Qualification Report Postage Statement* and *CASS Report* are required by the USPS and must accompany your mailing to the post office. The *Mailing Summary* and *Presort Parameters* reports are for your personal reference.

Postage Statement

Step 7 — Printing Required Tags for Containers

Tray or Sack Tag Information

Destination Line - shows the city, state, and ZIP Code (3 or 5 digits) of the destination postal facility. When required, the destination facility prefix (for example, "ADC") is used.

Content Line - shows the mail class, processing category, and other information required.

Office of Mailing - shows the origin or entry post office.

Printing Tray or Sack Tags Using MAILERS+4

1. From the Presort Results screen, select **Tray and Sack**.
2. Click **Print**.
3. Click **Finish** to exit the Presort Wizard.

Destination Line

Content Line

Office of Mailing

SAN CLEMENTE CA
STD FLTS CR-RTS SCH
RSM CA 92688   123456789
92672

926725290 123456789 000018

SAN CLEMENTE CA
STD FLTS CR-RTS SCH
RSM CA 92688   123456789
92672

926725290 123456789 000028

SAN CLEMENTE CA
STD FLTS CR-RTS SCH
RSM CA 92688   123456789
92672

926725290 123456789 000018

H   **92672**

6789 000038

SAN CLEMENTE CA
STD FLTS CR-RTS SCH
RSM CA 92688   123456789
92672

926725290 123456789 000048

STD FLTS CR-RTS SCH
RSM CA 92688   123456789
92672

926725290 123456789 000058

MXD LOS ANGELES CA
STD FLTS NON BC WKG
RSM CA 92688   123456789
901

901005820 123456789 000018

Step 6 — Printing Your Address Labels

Checklist

☐ Verify the data on the label is printed according to USPS guidelines.

☐ Verify automation barcodes are not truncated and have the correct number of bars.

Formatting Addresses Correctly

Format your label, keeping in mind the optical character reader (OCR) scans an address from the bottom of the mailpiece to the top.

The Postal Service will deliver the mail to the address designated on the delivery address line, which is always the line immediately above the city, state, and ZIP + 4 line.

Using Proper Type Style

In order for your addresses to be easily read by OCR's be sure to use the following guidelines:

✓ Use simple sans serif type (like Arial) with uniform thickness.

✓ No bold, italic, extended or condensed type styles.

✓ Point size between 10-12 points.

✓ No kerning, overlapping of characters, or words too close together.

✓ Address block cannot be skewed more than 5 degrees. Be careful when attaching labels.

✓ Using uppercase characters throughout the address block is preferred, but initial or title caps are acceptable.

✓ No punctuation.

✓ Left-justify every line in the address block.

✓ Use two-letter state abbreviations.

✓ Use one space between the city and state, two spaces between the state and ZIP + 4 code.

```
|||....|.||..||.||.||.|..|.|.||||....||..||..|.|||  ❻
**************ECRWSSXXC001  ❺
CURRENT RESIDENT  ❹
77 MASSACHUSETTS AVE  ❸
STE 36❷
CAMBRIDGE MA  02139-4301  ❶
```

What are the Elements of an Address Label?

The OCR scans the mailpiece from the bottom to the top.

❶ City State ZIP+4
❷ Suite/Apartment
❸ Delivery Address
❹ Name/Attention
❺ Endorsement Line
❻ POSTNET or Intelligent Mail Barcode

Printing Address Labels Using MAILERS+4

1. Click the **Print Address Labels** button.
2. Select the appropriate label description from the list by highlighting it. (i.e. Avery 5161) Select **Next >>**.
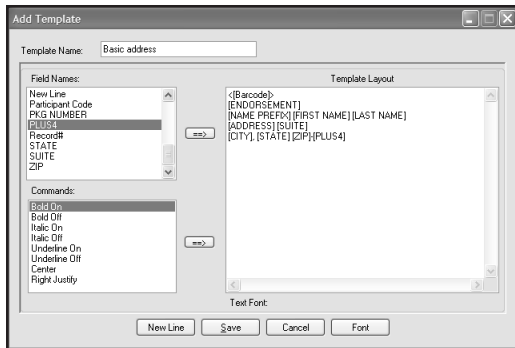
3. At the Template tab, create a new template. Place the appropriate fields for your label design by double-clicking the **Field Names**. **Save** your template and click **Next >>**.
4. Select the following Sequence commands: Presort Order, Normal Sequence; All Pages; and click **Next >>**.

5. Select the following Presort Options: The mailings from the **Job List** you wish to mail; print the **Endorsement Line** on all pieces; and a **Header Label** between tray changes. Select **Next >>**.
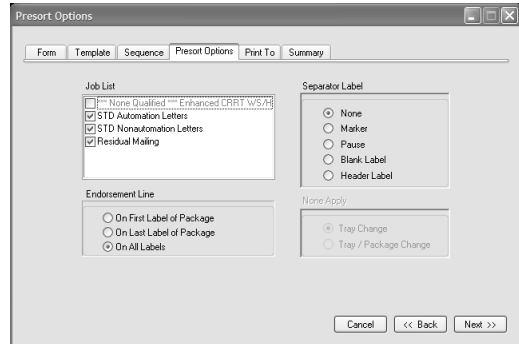
6. On the **Print To** tab, select a compatible printer driver from the listing. Selecting **Windows Driver** is best for small ink jet and laser printers and will use your default printer in the Windows Control Panel. Select **Next >>**.
7. Click **Preview** to verify your labels will print as expected, and click **Print** to start printing labels.

Step 8 — Putting Labels on the Mailpiece

Checklist

☐ Peel labels in order from left to right.

☐ Keep labels and mailpieces in the same order as the Qualification Report.

☐ Place labels in the proper location—with less than five degree skew—on the mailpiece.

☐ Ensure OCR readability according to USPS guidelines.

Mailpiece Clear Zones

Several places on the address side of a mailpiece are reserved for addressing and related information only. Always have your post office check the validity of your mailpiece before applying labels.

OCR Read Area - Extraneous (non-address) printing in the OCR read area can cause the rejection of the mailpiece. Be sure to have at least 1/2" all the way around the label.

You may place non-address printing such as company logos, advertising, and die cuts within the OCR read area only if you position this printing so that the lowest point is above the delivery address line.

Return Address - The return address must be above the OCR read area and should be printed in a type size smaller than the type size used in the delivery address.

Barcode Clear Zone - To ensure that the barcode is readable by barcode sorters, the barcode clear zone must be clear of all printing, markings, and colored borders.

Address Labels

Be sure to use address labels that are at least 3" long to ensure proper fit of the barcode. When applying labels to your mailpiece, be sure to place the label on straight within the OCR read area so there is less than a five degree skew.
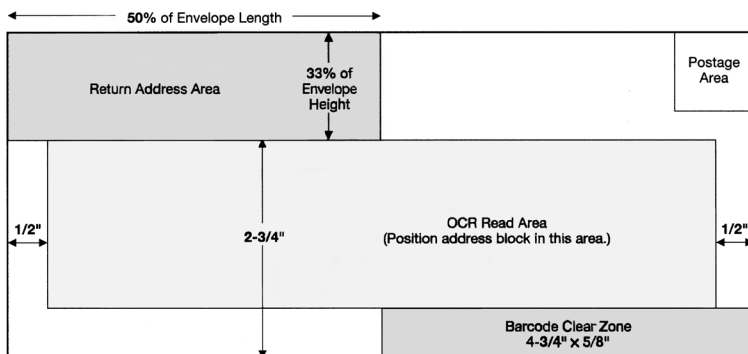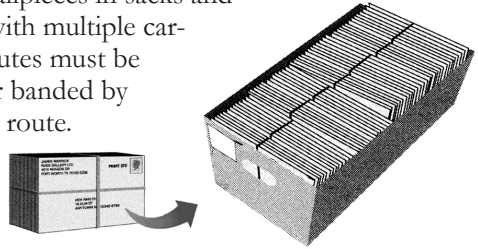

(Not Actual Size)

Step 9 — Assembling Your Mailpieces into Containers

Checklist

☐ Insert bar-coded tray tags into holders.

☐ Place mailpieces into trays or sacks according to the Qualification Report.

☐ Sleeve and strap appropriate trays.

First - Label Trays or Sacks

Place a tag securely on each sack or tray. Do not tape labels onto trays or label holders. Do not make handwritten changes to preprinted bar-coded labels—the machines read only the barcode.

Back

SAN CLEMENTE CA
STD FLTS CR-RTS SCH
RSM CA 92686 123456789   **92672**

Front

Second - Prepare Sorts

Pieces mailed to the same carrier route should not be rubber banded, but mailpieces in sacks and trays with multiple carrier routes must be rubber banded by carrier route.

Third - Sleeve & Strap Trays

Sleeve all the trays and strap non-local trays for transport. Strapping is not required for trays going to your local post office. See your Business Mail Entry Unit (BMEU) manager for details.
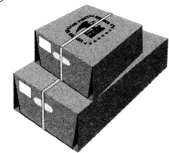
How do I rubber band packages?

If your package is 1 to 6 inches thick, place the first rubber band lengthwise, and the second rubber band around the height. If your package is less than 1" thick, only place one rubber band around the height.
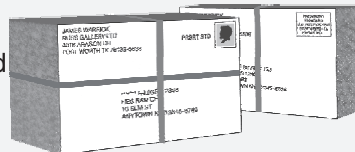
Step 10 — Taking It All to the Post Office

Checklist
- ☐ Signed CASS Form 3553.
- ☐ Signed Postage Statement.
- ☐ Printed Qualification Reports.
- ☐ *ZIP Code Record Report* (shows the CDS Certification date of a list that you purchased from Melissa Data) or *Walk Sequence Report* (provided by Melissa Data when we return your list after DSF processing.
- ☐ Sleeved and strapped trays.
- ☐ Payment ready.
- ☐ Deposit mail early in the day.
- ☐ Pick up extra supplies.

Sources of Postal Information

Business Mail Entry Unit (BMEU)

Name of Unit Manager   Extension

Additional Contact   Extension

Address

Telephone Number

Telephone Number (Account Balance Information)

Hours of Operation

Verification & Acceptance of Mail

All presorted mailings are deposited at their designated Business Mail Entry Unit (BMEU) or drop points with completed, accurate postage statements.

Business mail acceptance clerks will make sure your mail is properly prepared so that the Postal Service can efficiently process and deliver it. They will check your mailing for correct postage payment, correct endorsements, proper addressing, and the contents' eligibility for the class of mail indicated. They will also check to see whether the mail is properly sorted and barcoded.

If problems are discovered with the preparation of your mailing, you may correct the errors, or pay additional postage to compensate the Postal Service for the errors found.

Remember, the BMEU acceptance staff is there to help you. They want your mailing to be a success. Using Standard Mail for direct mail advertising is an effective way to reach clients, potential customers, members, friends, and other businesses.

Postal Business Center (PBC)

Address

Telephone Number

Hours of Operation