

MAILERS⁺4[®]

MAILERS+4 Quick Start Guide

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To view PAVE Gold Presort categories: MelissaData.com/pave.

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For the most recent version of this document, visit
<http://www.melissadata.com/tech/mailers+4.html>

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Welcome to MAILERS+4!

This easy-to-use desktop program is designed to help you prepare a mailing for maximum postal discounts and efficient postal processing and delivery. Whether you are mailing First-Class, Standard, or Periodicals, you will be able to move quickly and smoothly through MAILERS+4 using the friendly interface.

About MAILERS+4

MAILERS+4 postal automation software prepares your mailing list to meet USPS® requirements for maximum discounted mailings. This all-in-one CASS™ and PAVE™ certified software program verifies and standardizes addresses against the DPV®, SuiteLink™, and LACSLink® files for the highest level of address accuracy.

MAILERS+4 adds ZIP + 4® codes, eliminates duplicate records, postal presorts to the lowest rates possible, and prints barcoded labels, tags, and required postal forms.

There are two versions of MAILERS+4 — Standard and Professional. The Standard version only allows you to open files that contain 5000 records or less. The Professional version lets you open files of any size. A trial version of MAILERS+4 is also available to help you get familiar with our product. The trial version lets you try the full features found in the Professional version of MAILERS+4 for 14 days.

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

<http://www.melissadata.com/savings>

System Requirements

- Microsoft Windows® 7 or higher
- Minimum 256-MB of RAM
- Minimum 3.5 GB hard disk space
- DVD-ROM drive.

Where To Find Help

Online Help



MAILERS+4 contains an extensive online help file, including context-sensitive help, so you can locate the information you need quickly. Click the Help menu to access the online help file, or press F1 in any screen to view context-sensitive help.

User's Guide



The MAILERS+4 User's Guide, which can be found on the installation DVD, contains valuable information about using MAILERS+4. To view the MAILERS+4 User's Guide, you must have Adobe® Reader® installed on your computer.

Online Tutorials



You can find online tutorials right at your fingertips in the MAILERS+4 Help menu. View these short tutorials for a quick overview of the many features available in MAILERS+4.

Melissa Data Web Site



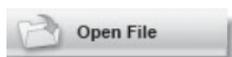
Check out the technical support section on our website at:
<http://www.melissadata.com/tech/tech.html>, where you can view the current application notes and FAQs. Our website also contains the latest product information for MAILERS+4 and other Melissa Data products.

Call Us Toll Free

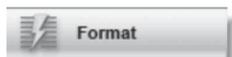


If you need help using MAILERS+4, please call us toll free at 1-800-MELISSA (1-800-635-4772), opt 4. Our technical support staff is available Monday - Friday from 6 a.m. - 5 p.m. Pacific Standard Time. You can also send an e-mail to Tech@MelissaData.com.

The MAILERS+4 Interface



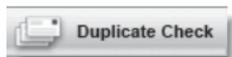
Open File — Opens a new database for processing.



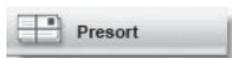
Format — Match field names in your database to data types in MAILERS+4.



Address Check — Verify and standardize addresses in your database, adding ZIP + 4 codes if necessary.



Duplicate Check — Detect and flag duplicate records in your mailing list.



Presort — Sort your list to receive the best possible postage discounts.



Print Labels — Print mailing labels using the new Intelligent Mail® barcode standard.



SmartMover — Real time NCOA^{Link}® processing. Update your files with the current addresses of individual, families and businesses that have moved, available 24/7/365.



Name Parse — Split a full name into its component parts and apply a gender code.



Phone Check — Verify, update and correct U.S. and Canadian telephone area code/prefix combinations.



GeoCoder — This option add-on will append latitude, longitude, Census tract and block, and county FIPS to the ZIP + 4 level.



Quick Tools — Tally, Records in Radius, Zips in Radius, and Export Street Address.

Getting Started with MAILERS+4

This section will assist you with the installation process, and introduce you to the basic features in MAILERS+4.

Step 1: Installing MAILERS+4

To install MAILERS+4:

1. Close all applications that are open, including any anti-virus and e-mail software.
2. Place the MAILERS+4 DVD in your DVD-ROM drive.
3. Click the Start button, and then select Run from the pop-up menu. The Run dialog box opens.
4. Type your DVD drive letter followed by `:\SETUP.EXE` in the Command Line box. (for example, `D:\SETUP.EXE`). After typing the path, click OK.
5. Read the license agreement, and then click Yes if you agree to the terms. (To proceed with the MAILERS+4 installation, you must accept this agreement.)
6. Some installation options, such as RBDI and Canadian Addresser, require a license string from Melissa Data to install. If you have not purchased these add-ons, you will not be able to select these options.
7. Select a program folder to install the MAILERS+4 files to. It is best to choose the default folder.
8. MAILERS+4 begins installation. After you have completed the installation process, be sure to reboot your computer before running MAILERS+4.

Step 2: Starting MAILERS+4

To start MAILERS+4:

1. Click the Start button, and then point to Programs. Point to the MAILERS folder, and then click MAILERS+4.
2. The MAILERS+4 Welcome screen displays. You can choose to read the tips now, or at a later time by accessing them through the Help menu.

You are now ready to open a mailing list. To learn how to do this, go to the next step.



Step 3: Opening a Mailing List

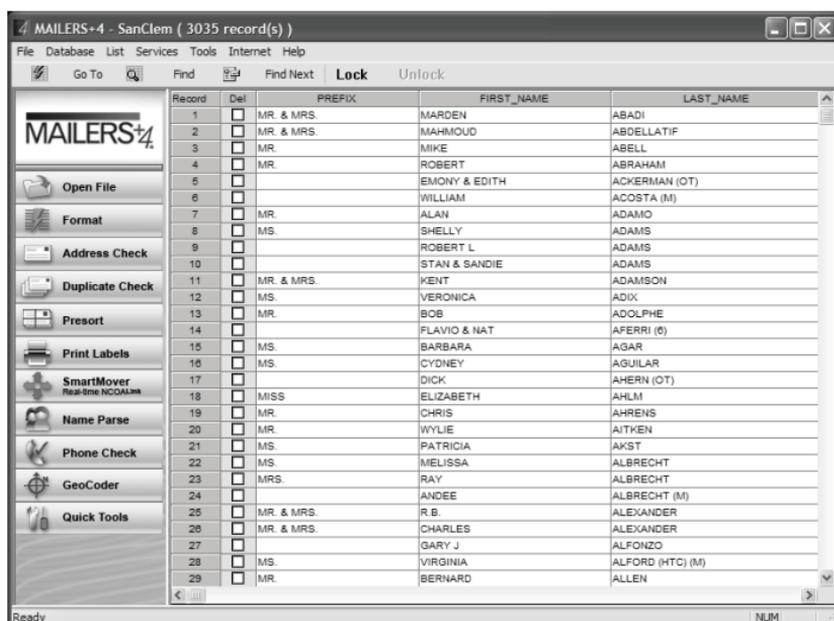
The following file types can be used in MAILERS+4.

File Types	File Extension
dBASE version, ACT! 3.0, Visual FoxPro	.dbf
ASCII fixed-length	.txt
ASCII comma-delimited	.csv
Microsoft Access	.mdb
Microsoft Excel (version 2000)	.xls

MAILERS+4 contains a test file (TEST.DBF) that you can use to become more familiar with the application. This file is located in the C:\Program Files\Melissa Data\MAILERS+4 directory.

To open an existing mailing list:

1. Click the **Open File** button or select **File > Open**.
2. Choose the type of database you want to open by using the **Files of type** drop-down menu.
3. Select the desired file, and then click **Open**.
4. The mailing list is opened in Browse mode. Now the buttons at the left will be active, meaning that the many functions of MAILERS+4 are now available.



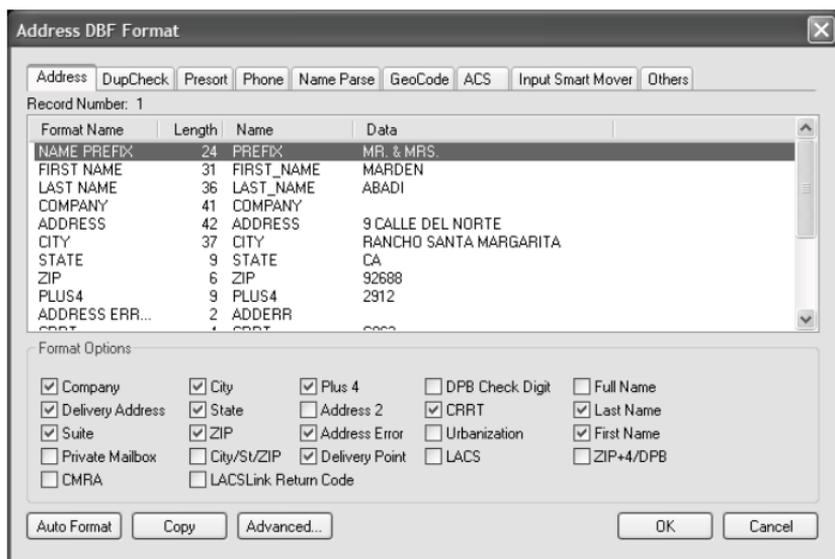
If you do not have a mailing list, you can create one. See the MAILERS+4 User's Guide on the installation DVD for information on how to do this.

Step 4: Formatting a Mailing List for Processing

If this is the first time you are using a particular mailing list with MAILERS+4, you need to format the fields in the list so MAILERS+4 can read and use the data properly. Formatting a list is the process of matching or mapping the fields in your list to their corresponding MAILERS+4 field names.

1. Make sure the mailing list you want to format is open.
2. Do one of the following. The Format Fields dialog box will then open.
 - Select **File > Format Fields**.
 - Click the **Format Fields** button.
3. If your file is a dBASE list, you can click Auto Format to automatically format your mailing list. You can also format a dBASE list manually by selecting the appropriate check boxes to “match” the field names.

If you have an ASCII fixed-length list, you will need to format the fields manually and specify the record length of each field if your file does not contain carriage return and line feed codes.
4. After you have finished formatting your mailing list, click **OK** to return to the List Information screen. You are now ready to verify the address information in your mailing list.

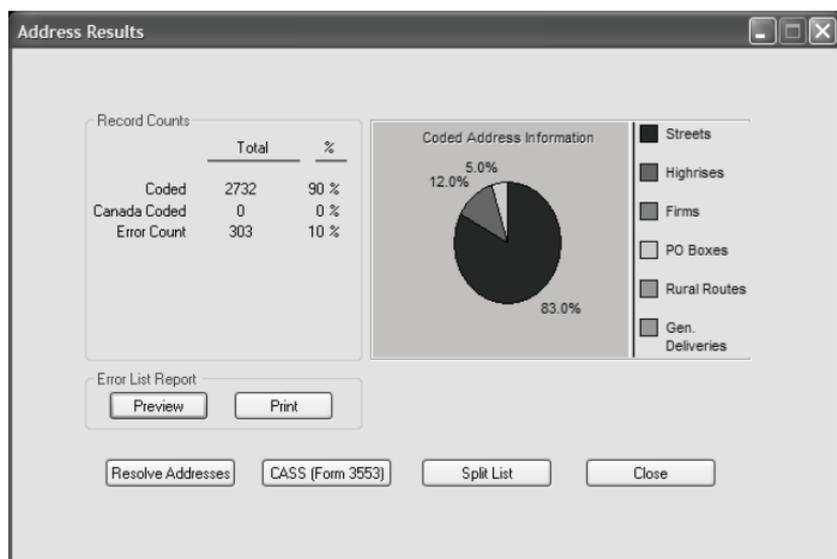


Step 5: Checking Address Information

MAILERS+4 verifies addresses in mailing lists using data contained in the National data files provided by the USPS. Once an address is verified, MAILERS+4 can standardize it to USPS/Canadian postal requirements, and append up-to-date information such as ZIP + 4, Carrier Route, and

Delivery Point codes. If there is incorrect address information in a record, MAILERS+4 will attempt to correct it.

1. From the **List Information** screen, do one of the following to open the **Address Check Options** dialog box:
 - Select **List > Address Check > Options**.
 - Click the **Address Check** button.
2. Select the desired options (or use the defaults already selected), and then click **Go**. You can view the status as the list is being processed. When the processing is complete, the results screen will be displayed. You can view how many records were processed, and how many records contain errors that could not be updated automatically. If you wish to view detailed information about the records containing address errors, click **Preview** or **Print** in the **Error List Report** box. MAILERS+4 lets you manually resolve address errors that still remain.



Resolving Address Errors:

1. In the **Address Check Results** screen, click **Resolve Addresses**. Another **Address Check Results** screen displays, listing the addresses that could not be updated.
2. Highlight the address record you wish to resolve, and then click **Resolve**. The original address and a code describing the type of

address error display in the upper-left portion of the Resolve Addresses screen.

3. Select one of the following options:
 - **Search in Range:** View only street ranges that encompass the address number of the selected record.
 - **Search out of Range:** View all street range data for the selected address.
4. Select the listing that matches the address in your record, and then click **Replace** to actually replace the address data in your list. If you do not find an exact match, you can do one of the following:
 - Edit the address information in the **Edit Info** box and try searching again.
 - Ignore this record by clicking **Cancel** and move on to the next record.
5. When you are finished resolving the address errors, click **Close** to return to the Address Check Results screen. You are now ready to print the CASS Certificate.

Printing the CASS Certificate (Form 3553):

The CASS Certificate (Form 3553) is required by the USPS to qualify mailings for Automation discounts. It shows that your records have been ZIP + 4 coded using USPS certified software.

1. Click the **CASS (Form 3553)** button in the Address Check Results screen.
2. Make sure the information that displays is complete.
3. Click **CASS Preview** to preview the CASS Certificate before printing it, or click **CASS Print** to print the certificate.
4. Click **OK** to return to the **Address Check Results** screen, and then click **Close** to return to the **List Information** screen. You are now ready to check your mailing list for any records that may be duplicated.

The CASS Certificate should only be printed once, after completing any database maintenance. Modifying your database by adding or removing records will invalidate the CASS Certificate, and you will need to print another one.

Step 6: Checking for Duplicate Records

MAILERS+4 can save you money on printing and postage by eliminating duplicate records in your mailing list. Duplicate Check can locate records with duplicate names and addresses, or find out if you are mailing to more than one person at the same address.

1. From the **List Information** screen, do one of the following:
 - Select **List > Duplicate Check > Single List**.
 - Click the **Duplicate Check** button.
2. Select the search criteria that you want MAILERS+4 to use when searching for duplicate records in your mailing list.
 - You can search by address, name and address, phone, or a user-defined key field.
 - You can specify if you want the duplicated records to be marked for deletion. These records will not be deleted, only marked for your review.
 - You can also specify which duplicate records you want to keep, based on where they appear in the mailing list.
3. After making your selections, click **Go**. The number of duplicate records that were located displays.
4. You now have the option of viewing the duplicate records on the screen, or printing out the results in a report.
5. Click **OK** to return to the **Duplicate Check Results** screen, and then click **Close** to return to the List Information screen. You are now ready to presort your mailing.

To permanently remove records that are marked for deletion, use the Pack feature. See the MAILERS+4 User's Guide for more information on this.

Step 7: Presorting for Postal Discounts

Presorting is a procedure that allows the USPS to work faster and more efficiently. When you presort your mail, you are eliminating the need for the Post Office™ to do so. The savings to the Post Office in labor and resources are passed on to you, the mailer, in the form of lower postage rates for presorted mail.

MAILERS+4 contains a Presort Wizard that will guide you through the presort process.

1. From the **List Information** screen, do one of the following:
 - Select **List > Presort > Options**.
 - Click the **Presort** button.
2. Select **New Mailing** to create a new template, and then click **Next**.
3. Complete the Post Office of mailing information. (This is where you obtained your bulk mailing permit.) Select **Save as default** if this is the

Presort

Post Office of mailing

City

State ZIP+4 .

Save as default

Mail Class

First-Class Periodicals Standard

Mail Piece Type

Postcard Letter/Card Flat

Rate Type

Profit Non-profit

Classroom Science of Agriculture

Destination Discounts

My post office of mailing is:

an SCF an BMC/ASF

Sample Size and Weight

Number of pieces in sample

Sample Thickness in inches

Sample weight in oz lbs

Piece Dimensions

Height of mail piece in inches

Width of mail piece in inches

Aspect Ratio

Width / Height

FSM 1000

Use FSM 1000 dimensions

Mail Processing Type

Nonmachinable

Help Cancel << Back Next >>

- only Post Office you use for bulk mailings.
4. Specify the **Mail Class**, **Mail Piece Type**, **Rate Type**, and if there are any **Destination Discounts**. For more information on these options, view the online help or the MAILERS+4 User's Guide. Click **Next** when you are finished.
 5. This screen also provides options for specifying the sample size and weight, piece dimensions, the aspect ratio, and the mail processing type. This information is very important to the sorting of your mail pieces into their containers. Enter the most accurate information, and then click **Next**.
 6. The **Tray and Sack** options screen adjusts MAILERS+4 tray tags to match the individual characteristics of your printer. You can print samples to verify these settings.

7. The **Postage Statement Information** screen must be completed before you can submit your mailing to the Post Office. However, you do not need to complete this information in order to print or review reports.

Presort

Permit Holder

Name:

Company:

Address:

City:

State: ZIP:

Phone:

Email:

Permit #:

Prepared For

ZIP:

Mailing Agent

ZIP:

Payment

Meter Imprint Stamp Save as default

Additional Information

Seq. # Mail Date

Agency Code CAPS/CTAS

Customer #

Move Update Method

Ancillary Service ACS OneCode ACS

FASTforward Alternative n/a Alternative Address

NCOALink Multiple

- The **Permit Holder** is the name on the permit from the Post Office where the mailing will be taken. It does not have to belong to the person preparing the mailing or the owner of the mailing list.
 - In the **Prepared For** fields, enter information about who the mailing is being prepared for.
 - If a mailing will be sent using the permit of a third party (not the user or list owner), enter the requested information in the **Mailing Agent** fields.
 - If you would like additional information to print on the **Postage Statement**, enter it in these fields.
 - If you want to use this information for future mailings, click **Save as default**.
8. The **Mailing Summary** screen shows what presort levels your mailing list may qualify for, and what levels it will attempt to sort to, in descending order from the lowest rate. Click **Go** to start the presorting process.

9. The **Mailing Results** screen displays the following information:
 - The rate levels your mailing qualifies for after presorting.
 - The number of mailing pieces and the cost for each rate.
 - Your total cost and savings of the mailing compared to a single piece First-Class postage.

Click **Next** to advance to the Reports screen.

10. The USPS requires that a **Qualification Report** accompany each qualified mailing. Highlight one mailing at a time, click **Qualification Report**, and then click **Print**.

Repeat for the **Postage Report** and **Tray and Sack** tags.

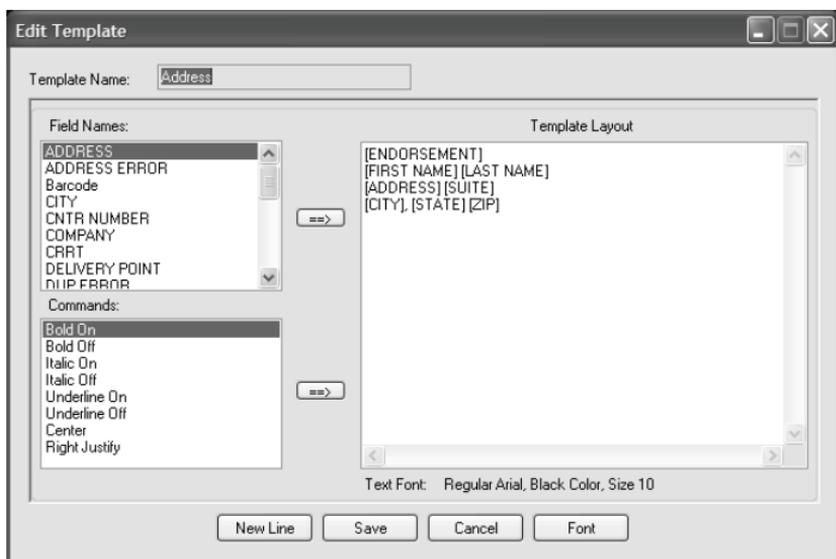
The **Mailing Summary** and **Presort Parameters** reports are for your personal reference — they are not required by the USPS.

11. When you have finished printing, click **Finish**. Click **Yes** to save these presort selections as a template for future mailings. Otherwise, click **No** to delete the selections for future mailings. Upon returning to the **List Information** screen, you will be ready to print labels and container tags for your mailing.

Step 8: Printing Mailing Labels

You can easily print mailing labels directly from MAILERS+4.

1. From the List Information screen, do one of the following:
 - Select **List > Print Labels > Address Labels**.
 - Click the **Print Address Labels** button.
2. On the Form tab, select the appropriate label description from this list. If your label is not listed, click **New** to create a new label description. Otherwise, click **Next** to display the **Template** tab.
3. On the **Template** tab, select an existing template, or create a new one. To create a new template:
 - Click **New**.
 - Enter a name for the new template in the **Template Name** field.
 - Specify the fields you want in your new label by double-clicking the desired Field Names. Use the space bar and Enter key when necessary.
 - When you are finished, click **Save** to save the template.



Click **Next** to display the Sequence tab.

- Specify the print order, print sequence, and the print range. (Selecting Presort as the print order will print the labels in the USPS-approved order for discounts.)

If you selected Presort as the print order, clicking Next will take you to the Presort Options tab (go to step 6). Otherwise, clicking Next will take you to the Print To tab (go to step 7).

- Click **Next**.
- For presorted mailings, you will need to select the following presort options:
 - Specify the mailing from the **Job List** for which you want to print labels.
 - If you placed an Endorsement field on your label, specify the labels that you want the Endorsement text to appear on (first, last, or all labels).
 - Specify if you want to use separator labels. Separator labels let you know when there is a change in tray and package numbers. Use the **Header Label** option if you are not sure which option to select.

Click **Next** to display the **Print To** tab.

7. On the **Print To** tab, select the desired printer driver. (Selecting **Windows Driver** is best for small ink jet and laser printers, and will use the default printer that is selected in Microsoft® Windows®.) If you are not sure which printer driver to select, contact Technical Support.)

Click **Next** to display the Summary tab.

8. The Summary tab displays the label options you selected. Be sure to read any notes in the lower portion of the Summary tab regarding your print selections.
- To preview how your labels will look, click **Preview**.
 - To make changes to your selections, click the appropriate tab or click **Back**.
 - To print sample labels, click **Print Sample**.

When you are ready to print your labels, click **Print**. You can also click **Cancel** to return to the List Information screen.

Some printer drivers require that you select the lines per inch, characters per inch, and the printer port.

Beyond the Basics

Using Other Program Features

MAILERS+4 contains many features that are not covered in this Quick Start Guide. You can read about them in the MAILERS+4 User's Guide.

Convenient Desktop Address Verification

ZIP*USA is a stand-alone program that is included with MAILERS+4. Use this convenient desktop application to verify single addresses and look up ZIP + 4 codes. You will also get the area code, county, time zone, carrier route, and delivery point for the particular address. To start ZIP*USA, click the Start button, and then point to Programs. Point to the MAILERS folder, and then click ZIPUSA.

Important Information

What do the dates on the software mean?

There are over one million address changes each month at the United States Postal Service. The continual updating of the address database is

The diagram features a stylized background with concentric circles and horizontal bands. On the left, a large curved arrow points from the right towards the text. The text is as follows:

Feb 20xx
ZIP + 4 Data Expires:
April 30, 20XX

Two arrows point from the text on the right to the two lines of text on the left:

- The top arrow points from "The large date is the bimonthly update version of MAILERS+4." to "Feb 20xx".
- The bottom arrow points from "The small date tells you when the ZIP + 4 data file in the software expires. After this date, you will not be able to append the ZIP + 4 codes needed for CASS certification, automated, Line of Travel presorts, and barcoded mail discounts." to "April 30, 20XX".

your guarantee for the highest rate of address accuracy when verifying and correcting the addresses in your list.

The large date is the bimonthly update version of MAILERS+4.

The small date tells you when the ZIP + 4 data file in the software expires. After this date, you will not be able to append the ZIP + 4 codes needed for CASS certification, automated, Line of Travel presorts,

and barcoded mail discounts.

MAILERS+4 displays the number of days remaining before expiration of the ZIP + 4 data. Once you have installed the software, select **Help > About MAILERS+4**. You will also see the database expiration date, and the expiration date of the software. (If you call Technical Support, you will need to know the Release date and the Build Number.)

What happens when the database in MAILERS+4 expires?

If you purchased a subscription, the next bimonthly update will automatically ship to you before your current database expires. (MAILERS+4 Professional customers can opt for a monthly subscription). If you are not on a subscription, but you need to append ZIP + 4 codes for an upcoming mailing, you should order the latest update version of MAILERS+4, or consider upgrading your single purchase to a subscription.

Melissa Data may release software patches between regular releases. MAILERS+4 will prompt you to download and install the patch when you start the program.

If you have trial software...

If the ZIP + 4 database expires before the trial software, you will not be able to apply any processing that requires the ZIP + 4 Code. If you are unable to try out the trial software before the ZIP + 4 database expires, call MELISSA DATA and request the current trial software.

How to order...

To place an order, just call (800) MELISSA (1-800-635-4772). You can get a free, one-hour, hands-on tutorial over the phone with the purchase of a subscription.

If you are ordering for the first time, our customer service representatives will help you determine which version of MAILERS+4 will best meet your needs based on the maximum number of pieces you would be mailing, and if you will benefit from a subscription service.

Satisfaction guaranteed

Melissa Data proudly stands behind its products. If, for any reason, you are not 100% satisfied with the Professional or Standard MAILERS+4 program, please return it within 30 days for a full purchase price refund, less shipping.

Troubleshooting

Question

How can I verify the addresses from my website orders with MAILERS+4?

Answer

Use Address Object, a programmer's component for both custom PC and Web applications, available from MELISSA DATA.

You can add all the lookup and verification power you need to verify addresses collected from your Web site, catching data entry errors, adding ZIP + 4 codes, and reducing fraud. Address Object uses the same updated database found in MAILERS+4.

Our objects help you achieve the same data accuracy as running your mailing list through MAILERS+4.