

# User Manual



AccuMail<sup>®</sup> frameworks<sup>™</sup>  
*Make Every Address the Right Address.*

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## INTRODUCTION

AccuMail® frameworks provides you with powerful, industry-leading address hygiene software. CASS Certified™ for accuracy by the United States Postal Service®, AccuMail frameworks not only cleans the address data in your system to meet the very latest Postal Service standards, it automatically takes you through the four steps to achieving Total Address Quality:

### Standardize

Correct, parse and standardize your address data by comparing it to the very latest USPS data, adding ZIP+4™ information and highlighting possible costly duplicates.

### Validate

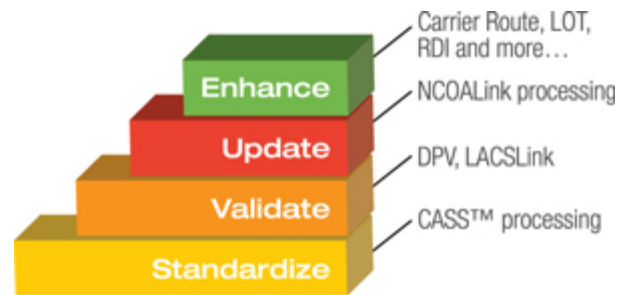
With built-in DPV® and LACSLink® you can be sure each address is a deliverable location, conforming to the latest USPS® addressing standards.

### Update

The optional AccuMail Move module utilizes the latest NCOALink® data from the Postal Service to update the addresses of any movers in your database.

### Enhance

AccuMail brings added value to your database by providing additional data such as Carrier Route information, Line of Travel, Congressional Districts, County Codes and more. Enhance your data further with add-ons such as our RDI Module, which distinguishes between residential/business addresses, or AccuMail Geocode, which assigns geographic data (such as latitude/longitude coordinates) to the addresses in your database.



*The 4 Steps to Total Address Quality*



*AccuMail Validates and Enriches Your Data*

This User's Guide will provide you with complete instructions on using all of the great features of AccuMail® frameworks, but if you have additional questions, please contact us at [support@smartsoftusa.com](mailto:support@smartsoftusa.com) or visit the Support section of our website at [www.smartsoftusa.com](http://www.smartsoftusa.com) where you can access Product Tutorial Videos, FAQs, a Knowledge Base and more.

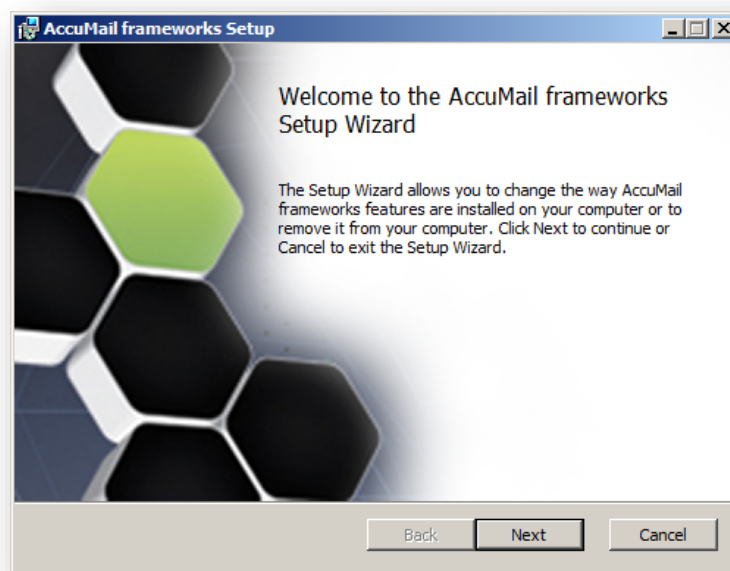
## SYSTEM REQUIREMENTS

<b>Operating System</b>	Windows XP, Vista, Windows 7 operating system with current available service packs installed
<b>Memory</b>	1GB RAM (2GB or higher recommended)
<b>Hard Disk</b>	2GB of available hard-disk space for typical installation
<b>Other</b>	DVD ROM drive  Internet Access recommended (Required for some Add-ons)  Microsoft .NET framework 3.5 or later installed  Microsoft Visual C++ Runtime files

## INSTALLATION INSTRUCTIONS

Below are the steps needed to install AccuMail frameworks.

1. Place the DVD in your DVD-ROM drive.
2. Go to **Start | Run**, and type D:\Setup.exe, where D:\ is the drive letter of your DVD-ROM drive. **If you have Windows 7 or Windows Vista, please run this as an administrator.**
3. If you don't have Microsoft Visual C++ Runtime files and Microsoft .NET Frameworks 3.5 installed, they will be installed automatically.
4. The following screen will appear, click **Next**:



5. You will now be asked to accept the license agreement, follow the on screen instructions to complete the installation.

## SCREEN FEATURES

The AccuMail frameworks main screen is divided into several parts. Clicking on a specific section will allow certain tasks to be performed. The sections are: Menu, Toolbar, Tasks, Database Options, Database Properties and Database Window. Each part is discussed below.

When you open AccuMail frameworks for the first time you will see this screen.

The screenshot shows the AccuMail frameworks main screen. The interface is divided into several sections:

- Menu:** Located at the top, containing File, View, Data, Tools, and Help.
- Toolbar:** Located below the menu, containing various icons for file operations, database management, and help.
- Tasks:** A vertical list of tasks on the left side, including Database List, Address Correction, Duplicate Management, Card View Designer, and Module List.
- Task Details:** A section below the tasks, showing DB Properties and User Info.
- Database Properties:** A section showing details for the selected database, including Folder, Table, Filter, Records, From, Type, Date/Time, and Notes.
- Database Window:** The main area displaying a list of databases and a detailed view of the selected database (Test List).

The Database List table shows the following data:

Database	Location	Date Modified	Notes
test list.fwdb	c:\programdata\...	04/26/12 11:50:17	
sample.fwdb	c:\programdata\gm...	04/26/12 08:42:05	
nonim_april.fwdb	c:\users\pand\desk...	04/11/12 16:33:25	

The Test List window shows a detailed view of the selected database, including a table with columns: Mr/Ms, First, Last, Title, Company, Suite, Street, City, State, Zip, Phone, Fax, Note, LOT, 1001, CRRT, DPB, Result. The table contains 12 rows of data.



## MENU

The Menu Bar is separated into sections

### FILE MENU

---

Click on the **File** menu and the drop down menu will display the available options.

**New:** Creates a New empty Database

**Open:** Opens an Existing Database

**Close:** Closes currently Opened Database

**Open Saved Duplicates ...:** Opens Saved Duplicates

**Close Saved Duplicates:** Closes the Saved Duplicates

**Import:** Imports lists into frameworks

**Export:** Exports list to a Comma Delimited or a MDB File

**Backup:** Makes a backup copy of the current database

**Restore:** Restores a backup database

**Print:** Currently disabled

**Print Preview:** Currently disabled

**Print Setup:** Allows you to select/setup your printer

**New Report:** Allows you to customize a report

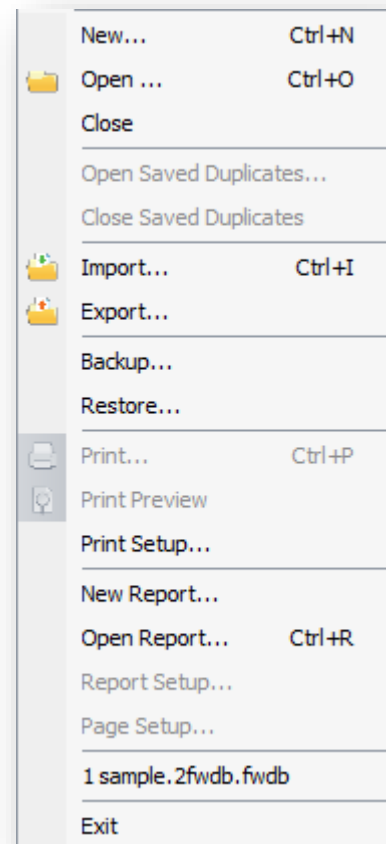
**Open Report:** Allows you to select a specific report

**Report Setup:** Currently disabled

**Page Setup:** Currently disabled

**Recent Databases:** Lists the recently opened databases so they can be opened

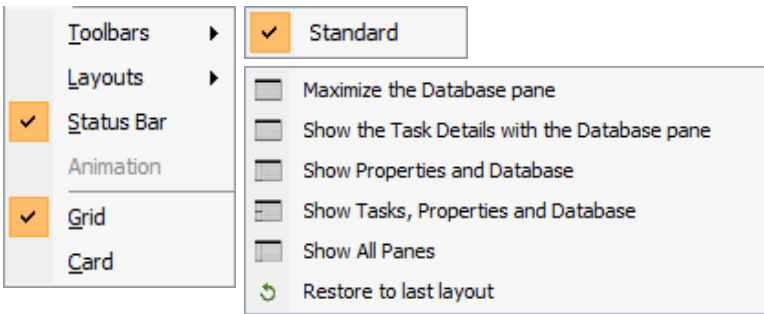
**Exit:** Exits AccuMail frameworks



## VIEW MENU






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Click on the **View** menu and the drop down menu will display the available options.



**Toolbars:** This allows you to turn the **Standard** toolbar on or off

**Layouts:** You can choose from one of the following layouts:

-  **Maximizes the database pane** – this uses more of the available window for the database data
-  **Show task pane with database pane** – this shows the task list as well as the database data
-  **Show task details with database pane** – this shows information about the task as well as the database data
-  **Show all panes** – This is the default display of frameworks
-  **Restore to the last layout** – Restores the view to the last selected layout

**Status Bar:** Check this to see the status of a process at the bottom of the screen

**Animation:** Select to use animation where available

**Grid:** Select this to see the database in a “spreadsheet” view

**Card:** Select this to see the database in a card view

## DATA MENU

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Click on the **Data** menu and the drop down menu will display the available options.

**Refresh Data:** Used mainly for Network version, refreshed data so you have the most up to date information in your database

**Enable Grid View Edits:** Check this to allow editing of data in the grid view. Uncheck to protect the data so it cannot be changed.

**Table Management:** Opens the Table Management Window

**Map Fields:** Opens the Map Fields Window

**Filter:** Opens the Filter Window

**Batch Edit:** Opens the Batch Window

**Add Record:** Click on this to add a new record to the list

**Delete Record:** Click on this to delete a record from the list

**Lookup Address:** Does a single address lookup on the selected record

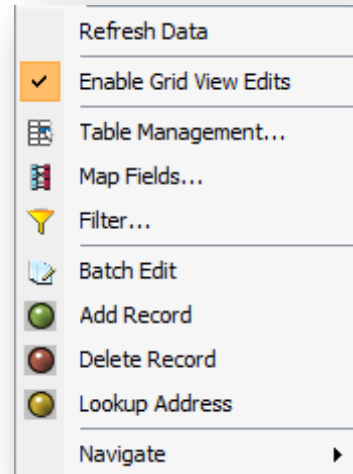
Navigate:

**First Record:** Click on this to move to the first record in the list

**Page Down:** Click on this to move to the next record in the list

**Page Up:** Click on this to move to the previous record in the list

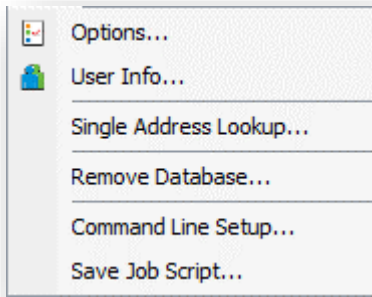
**Last Record:** Click on this to move to the last record in the list



## TOOLS MENU

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Click on the **Tools** menu and the drop down menu will display the available options.



**Options:** Opens the Options for AccuMail frameworks

**User Info:** Opens the System User Information screen

**Single Address Lookup:** Opens the Single Address Lookup window; this allows you to enter an address to see if it is a valid mailing address

**Remove Database:** Deletes the current database, or a selected one

**Command Line Setup:** Available with the Command Line Addon. This option will open the Command Line Setup window.

**Save Job Script:** Available with the Command Line Addon. This option will allow you to save the open task as a job script.

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## OPTIONS

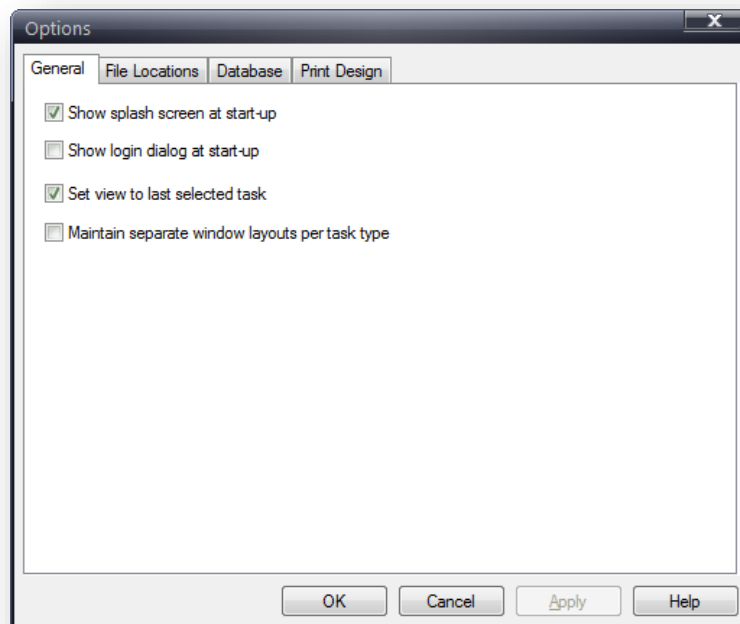
Click on **Options** and additional choices will appear. There are four tabs: General, File Locations, Database and Print Design.

### TOOLS - OPTIONS MENU

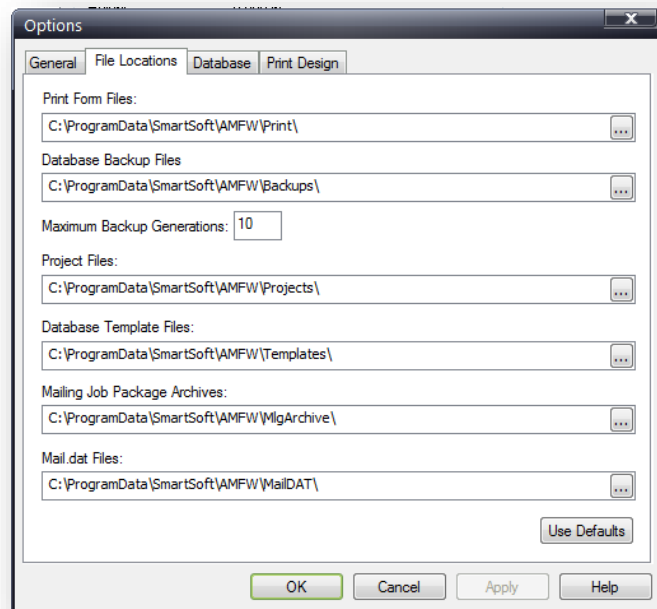
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Click on the tab in the Options window to show the following options.

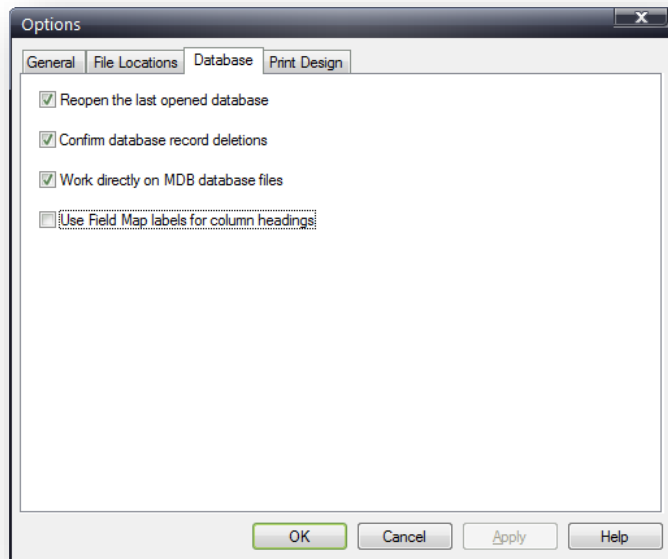
1) **General:** This sets up what happens when you launch AccuMail frameworks. Check a box to select an option. The options set whether the opening splash screen plays, show login prompt at start up, shows the last selected task that was run, opens multiple windows for different tasks.



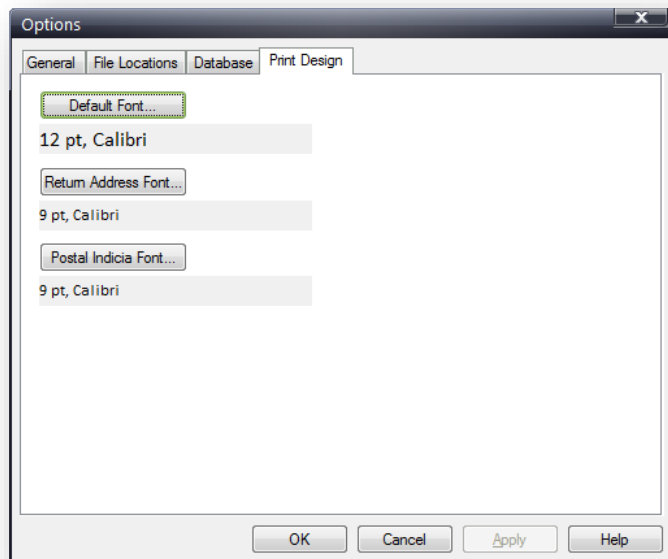
2) **File Locations:** This sets the default paths for saving folders and for the number of backups retained.



3) **Database:** This determines whether a pre-defined field map is used for mapping the columns of data, shows the last database used, confirms database deletions, and alters an MDB file instead of using the frameworks file (fwdb).



4) **Print Design:** This screen determines the default font for reports.



## TOOLS - USER INFO MENU

The System User Info screen is used to setup the information that appears on the CASS and Postage Statement reports.

You can choose from multiple entries by either **Name** or **Company**. Click on the radio button to make your selection.

**New:** Adds a new name to the user records by clicking on and entering the information in the **Details** box

**Remove:** Deletes an entry from the user record

**OK:** Saves your changes and closes the window

**Cancel:** Closes the window without saving the changes

**Apply:** Saves the changes but stays in the System User Info window for additional changes

System User Info

User Records:

Sandi Devlin

Display by: ☒ Name ☐ Company

Details:

General Information

Name	Sandi Devlin
Company	Datatech Smartsoft
Address Line 1	5951 Endina Rd
Address Line 2	Ste 201
City	Endina
State	CA
Zip	93111
Phone	888 227 7221
Email	

USPS Information

Customer Number	
CAPS Customer ID	
Dun & Bradstreet Num.	
Permit Num.	
Fed. Agency Code	
Non Profit Authorization Number	
USPS Mailer ID	
USPS CRID	
PostalONE! User License	

Zip

New Remove OK Cancel Apply

## SINGLE ADDRESS LOOKUP

To correct a single address at a time, or to look up an address not in your database, you will need to open the following screen. To correct an address in your list, select the address from the List View and click on the button in the List View Menu bar.

To look up an address not in your list go to **Tools | Single Address Lookup**. When you navigate from the tools bar the address information is blank. When you navigate through the List View your address will be automatically entered.

Single Address Lookup

Address

First Name:

Middle Name:

Last Name:

Company:

Primary Street:  Suite:

Secondary Street:

City:  State:

ZIP+4:  -  DPC:

Carrier Route:  County:

Urbanization:

Result:

Options

☒ Standardize Streets ☐ Use Alias Street Name

☒ Use Mixed Case ☐ Add Check Digit to Delivery Point

Close

Lookup

Browse...

Clear

The buttons on this screen are:

**Close** - Closes this screen

**Lookup** - Performs an address lookup on the entered address, filling in the results at the bottom of the screen.

**Browse** - Opens the [Browse all Streets window](#)

**Clear** - Clears the address information from the screen

**Options:**

Click on the **Standardize Streets** check box to standardize street addresses. AccuMail frameworks corrects the prefixes, suffixes, directionals, and other abbreviations to standard US Postal Service spellings. It also corrects the spelling of the street name itself, but does not change the house or street number.

Click on **Use Mixed Case** to select mixed case as the output of your database. If you would rather have your list be all Upper Case do not select this option. The address must be assigned a plus-four to be CASS Certified.

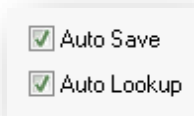
Next you can select **Alias** or base street names. An *alias* name is an alternate name for a street. It may be a name by which a street was formerly known, a commonly used nickname for a street, or one the community prefers to use.

The USPS designates one of the street names the "base" street name and calls all other names "alias" street names. For example, in a given ZIP Code, 1st St may be an alias for Martin Luther King Jr. Hwy. In this case, the street name has changed. The USPS strongly encourages mailers to use the base street name, Martin Luther King Jr. Hwy, because it is the new name. However, the alias 1st St is also allowed.

When you browse through the database, AccuMail frameworks displays both the base and alias street names. However, when you run a task, you need to select which one you want to use.

If you want to retain the alias in the input file, click on the **Use Alias Street Name** check box. If you want AccuMail frameworks to always use the base street name preferred by the USPS, leave this option unchecked.

Select **Add Check Digit to Delivery Point** to combine the address check digit for mailing into the field you have mapped to **Delpt** (Delivery Point).



When you select the **Single Address Lookup** from the List View Menu Bar you have two additional options:

To automatically save your work upon closing the screen, click **Auto Save**.

To automatically lookup the record when entering the **Single Address Lookup** screen, select **Auto Lookup**.

## SINGLE ADDRESS LOOKUP BROWSE WINDOW

When selecting the Browse feature in the Single Address Lookup window you will see the following screen:

The 'Browse Best Streets' window contains the following sections:

- ZIP Codes/Cities:** A table with columns City, ST, and ZIP.
- Streets:** A table with columns Street, PreDr, Sfx, PstDr, City, ST, ZIP, AISt, AIPre, AISfx, and AIPst. It contains one entry: Carwood, St, Agoura, CA, 91301.
- Primary Ranges:** A table with columns Low, High, O/E, CRRT, Zip4, Comp., and Scnd.
- Secondary Ranges:** A table with columns Unit, low, high, prty, crt, zip4, and cmpny.
- Buttons:** Assign Primary, Assign Secondary, and Close.

This screen will allow you to browse the USPS Data to select the proper address. When you have an address entered into the Single Address Lookup screen you will see it under the Streets section. Double Click on the street to fill in the Primary Ranges for that street:

The 'Browse Best Streets' window shows the same layout as the previous screenshot, but with the Primary Ranges table populated with data for the selected street:

Low	High	O/E	CRRT	Zip4	Comp.	Scnd
27000	27098	EVEN	C005	23ND		
27001	27099	ODD	C005	23ND		
27100	27198	EVEN	C005	23ND		
27101	27199	ODD	C005	23ND		
27200	27299	BOTH	C005	2310		
27400	27499	BOTH	C005	2462		
28201	28299	ODD	C021	3241		
28400	28498	EVEN	C021	33ND		



To see if that particular range has any secondary information, double-click on the desired range:

**Browse Best Streets**

ZIP Codes/Cities

City	ST	ZIP
------	----	-----

Streets

Street	PreDr	Sfx	PatDr	City	ST	ZIP	AISt	AIPre	AIStx	AIPat
Canwood		St		Agoura	CA	91301				

Primary Ranges

Low	High	O/E	CRRT	Zip4	Comp.	Scnd
29105	29105		C020	6314		Scnd
29125	29125		C020	6315		Scnd
29145	29145		C020	1593		Scnd
29200	29298	EVEN	C027	15ND		
29201	29299	ODD	C027	1555		
29209	29209		C027	1579		Scnd
29219	29219		C027	1560		Scnd
29229	29229		C027	1561		Scnd

Secondary Ranges

Unit	low	high	prty	crt	zip4	cmpny
Ste	100	110	80	C027	1561	
Ste	200	211	80...	C027	1515	

Assign Primary Assign Secondary Close

Select the desired range and click **Assign Primary** to update your database if all you want to add is the **Primary Range** information; if you need to add the **Secondary Range** information select the **Assign Secondary** button.

## HELP MENU

Click on the **Help** menu and the drop down menu will display the available options.

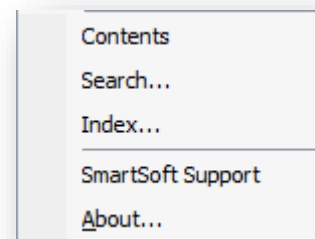
**Contents:** Opens the Help File to the Contents section

**Search:** Opens the Help File to the Search section

**Index:** Opens the Help File to the Index section

**SmartSoft Support:** Opens the SmartSoft website in your default browser

**About:** Opens the **About** AccuMail frameworks screen



## TOOLBAR

The toolbar in AccuMail frameworks is made up of short-cuts or icons. You can access many of the features of AccuMail frameworks by Menu selection or by these Icons.



**Import Data:** Click on this to import a list



**Export Data:** Click on this to export data



**Opens Database:** Click to open an existing frameworks database



**Print:** This will print the current job



**Print Preview:** This will display a preview of the current print job



**Template:** This saves a new template name for a database



**Table Management:** This creates the fields for default mapping of a database



**Map Fields:** This maps database field names to fields in the list



**Filter:** This allows you to select a specific set of records in the database



**Batch:** Writes scripts to batch up jobs



**Add Record:** This is used to add a record to a list



**Delete Record:** This is used to delete a record from a list



**Options:** This is used to set the options for frameworks Canada



**User Info:** This sets the User Info. Click on the plus sign to the right of the main headings in the options to show the options or click on the minus sign to close them.



**Maximizes the database pane** – this uses more of the available window for the database data



**Show task pane with database pane** – this shows the task list as well as the database data



**Show task details with database pane** – this shows information about the task as well as the database data



**Show all panes** – This is the default display of frameworks

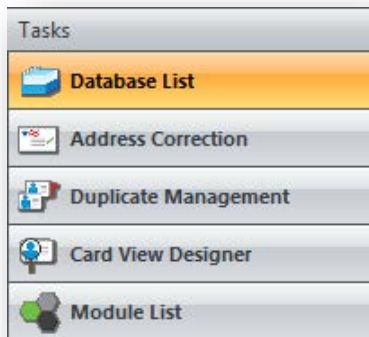


**Restore to the last layout** – Restores the view to the last selected layout



**Help** – Opens the help file

## TASKS

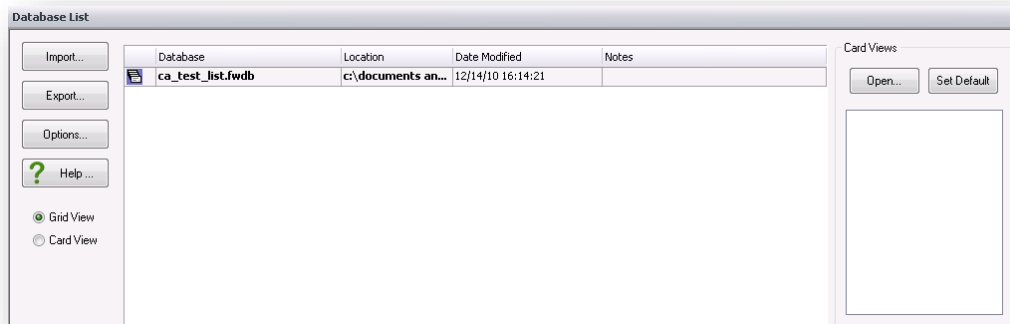


The task section is divided into parts, each representing specific functions. There is a pin in the top right corner that allows you to display the task area or to compress it so the Database List area has more room on the screen. To compress the task area, click on the pin button.

To redisplay the task area, click on the Tasks tab at the upper left of the screen or hold the mouse button on it to display the task windows, and then click on the pin to display the list of tasks. An explanation of the individual tasks is explained below.

## DATABASE LIST

Click on **Database List** to see a listing of recent databases used in AccuMail frameworks.

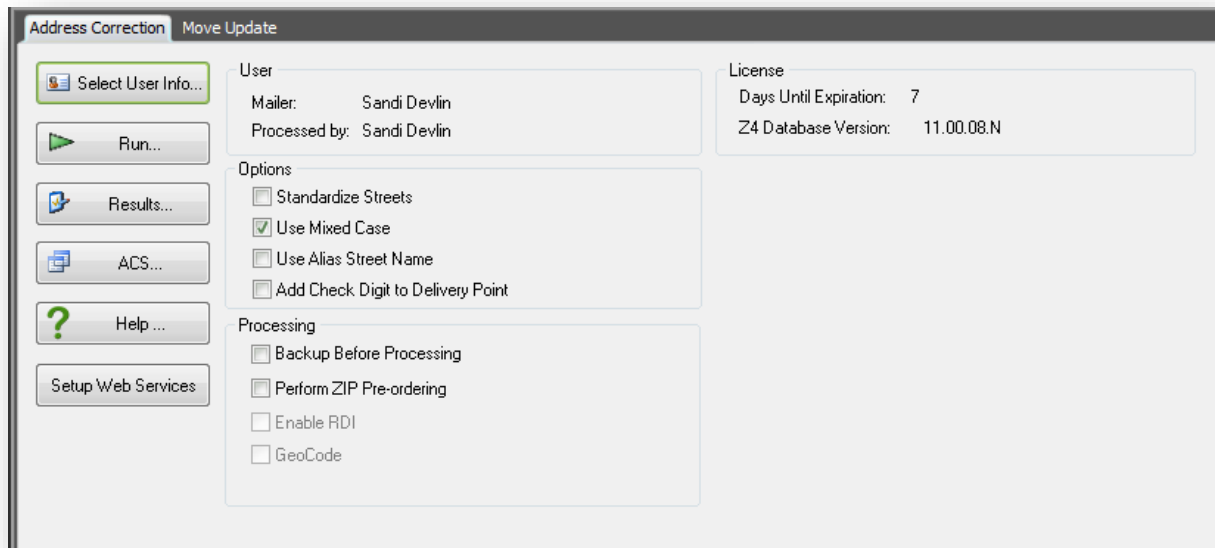


## ADDRESS CORRECTION

The Address Correction task contains two tabs, **Address Correction** and **Move Update**. The **Address Correction** tab includes the options for validating via local data or Web Services, the Move Update tab will validate and NCOA<sup>Link</sup> the list.

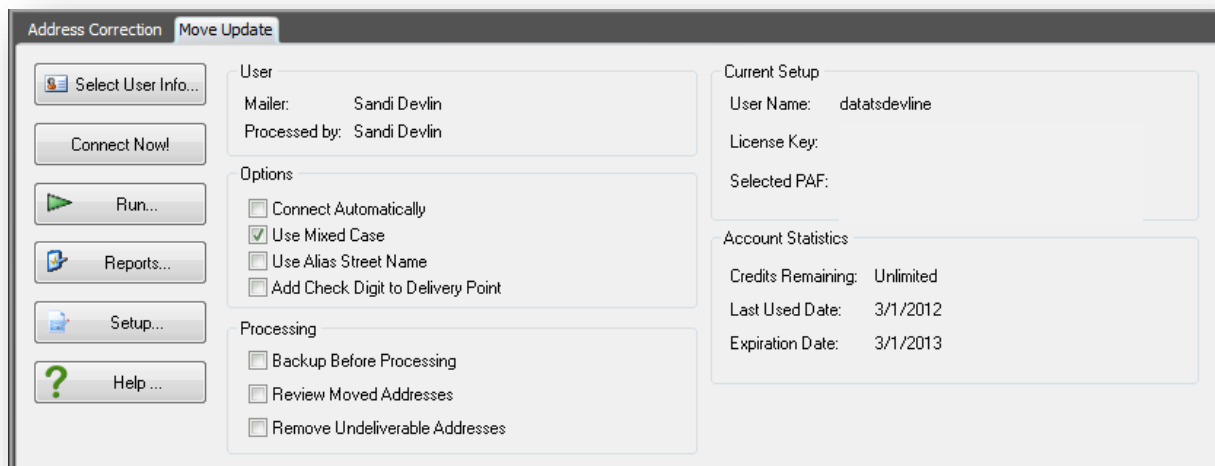
### ADDRESS CORRECTION

This will validate the records in the active list without NCOA<sup>Link</sup> processing.



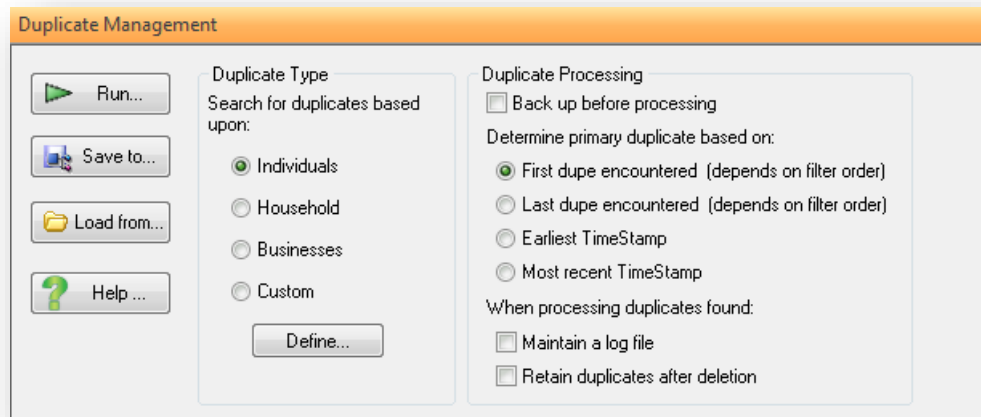
### ADDRESS CORRECTION WITH MOVE UPDATE

This will validate the records in the active list and also use the NCOA<sup>Link</sup> processing.



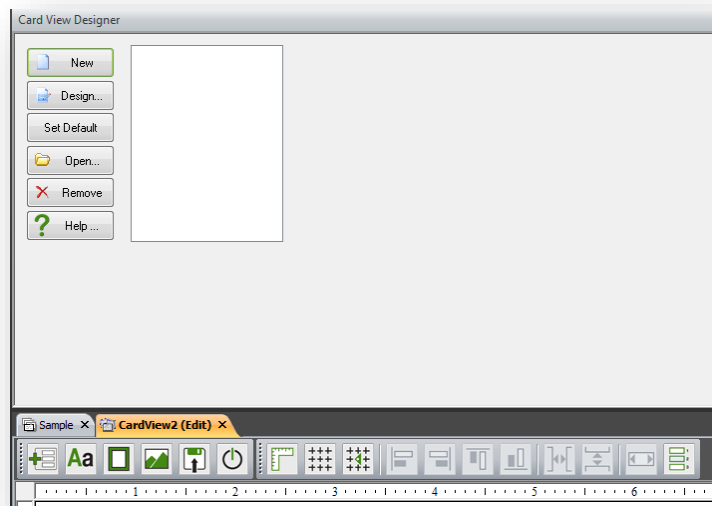
## DUPLICATE MANAGEMENT

This will find and delete duplicates in the active list.



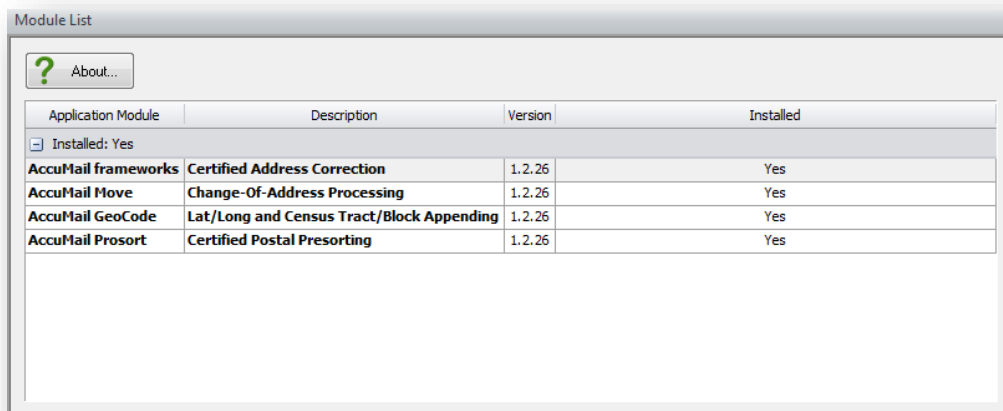
## CARD VIEW DESIGNER

There are two options for displaying the data in a list: grid view (the columns and rows of data display) or card view. The default is the grid view. Select the card view for viewing a single record at a time, or for data entry.



## MODULE LIST

Click on Module List to see the existing modules available in AccuMail frameworks.



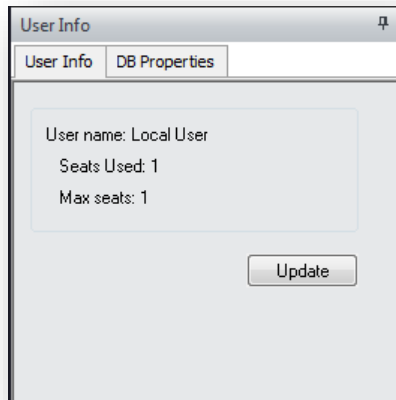
## DATABASE PROPERTIES

This section contains information about the active list and multi-user availability.

### USER INFO

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**User Info** contains information for multi-user setups: number of seats used and the maximum number of seats available.



## DATABASE PROPERTIES

---

**Database Properties** contains information about the active list. The information detailed is:

Name of the active file

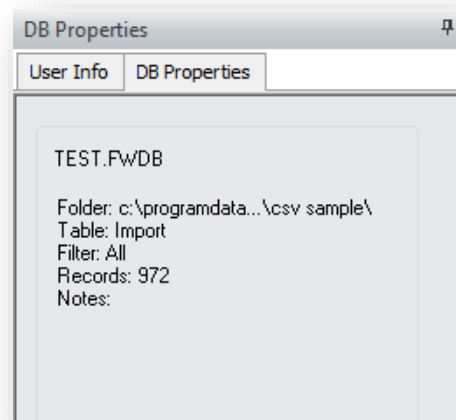
**Folder:** the path where the file is located

**Table:** the name of the table used to map the data

**Filter:** used to select a subset of the records in the file

**Records:** the number of records in the file

**Notes:** if any notes are made regarding the file



## DATABASE WINDOW

The Database Window shows the database you have selected. There are two ways to view the database: List View and Card View.

List View shows all the database records on one screen, as the Card View shows one record at a time. The options for both views are the same.

	Mr/Ms	FirstName	LastName	Title	Company	Suite	Street	City	State	ZIP/Zip4	Phone	Fax	Note	LOTCode
1	Mr	Vern	Ramey				3374 W 65TH ST	TULSA	OK	74132-1209				0076
2	Mr	David	Stewart				399 W MARSHALL AVE	PHOENIX	AZ	85013-1816				0078
3	Ms	Laurie	Eisentrout				5627 N 16TH ST APT D2	PHOENIX	AZ	85016-2925				0019
4	Mrs	Kelly	Hurn				2032 E MONTEREY WAY	PHOENIX	AZ	85016-7216				0092
5	Mr	Dan	Gorman				1718 E CAMPBELL AVE APT 1	PHOENIX	AZ	85016-5460				0000
6	Mr	Joe	Weiner				3651 N 29TH ST	PHOENIX	AZ	85016-7006				0065
7	Dr	Allison	Phillips				2837 E MONTECITO AVE	PHOENIX	AZ	85016-5835				0096
8		Doug	Hunter				2410 E OCOTILLO RD	PHOENIX	AZ	85016-1220				0153
9		John	Russell				6808 N 18TH ST	PHOENIX	AZ	85016-1061				0016
10		Douglas	Malm				2901 E OSBORN RD	PHOENIX	AZ	85016-7036				0000
11		Dan	Concini				5107 N 21ST ST	PHOENIX	AZ	85016-3409				0000
12		Lois	Burgmeier				2546 E GLENROSA AVE	PHOENIX	AZ	85016-5610				0000
13		Steven	Gainter				4223 E CHEERY LYNN RD	PHOENIX	AZ	85018-6428				0179
14		Bruce	Markowitz				3040 N 36TH ST	PHOENIX	AZ	85018-6999				0096
15		M.	Drake				3426 E ELM ST	PHOENIX	AZ	85018-3430				0132
16		Ken	Hirschfeld				4723 N 44TH ST	PHOENIX	AZ	85018-3802				0000
17		Joseph	Tillack				4530 E CALLE DEL MEDIO	PHOENIX	AZ	85018-3810				0000
18		Paul	Bradford				5537 E MONTEROSA ST	PHOENIX	AZ	85018-4533				0000
19		Bill	Green				5415 E EXETER BLVD	PHOENIX	AZ	85018-3104				0161
20		Rickey	Levno				5133 E EXETER BLVD	PHOENIX	AZ	85018-3008				0121
21		John	Harvey				5901 E CALLE DEL NORTE	PHOENIX	AZ	85018-4620				0223

The icons available on this screen allow you to navigate through your database.



First Record



Last Record



Page Down



Page Up



Go to a specific record



Add a record



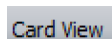
Does a single address lookup on the selected record



Delete a record



Shows current filter, allows you to select other filters associated with your list



Creates a new Card View




## DATABASE MANAGEMENT

AccuMail frameworks is a powerful database management tool. This section covers Database templates, table management, import and export of data, mapping fields, setting filters, batch updating, adding and deleting records, layout organization, options and system user information.


### DATABASE TEMPLATE



To create a new list template in the database view, click on the  icon. At the prompt, give a name to the template and click **OK**.

### TABLE MANAGEMENT



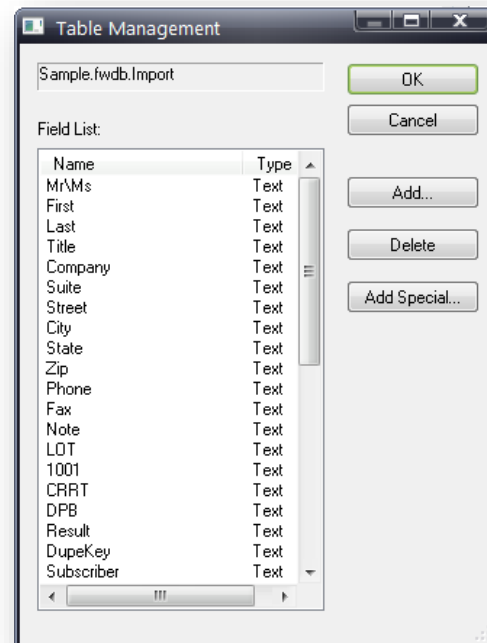
To manage your list structure, click on the  icon. The table management window displays the name of the table and lists the name and type of fields in the list. You can add or delete a field or add a special field (those fields that AccuMail frameworks needs for validating or presorting).

The Buttons on the right are:

- **OK:** Closes the Window saving your changes
- **Cancel:** Closes the Window not saving your changes
- **Add:** Add a field
- **Delete:** Delete a field
- **Add Special...:** Add a field that frameworks uses specifically for validation and presorting

To add a field:

1. Click on **Add**
2. A window will display where you assign a field name and type of field
3. Click **OK** and the new field will be added to the list of fields

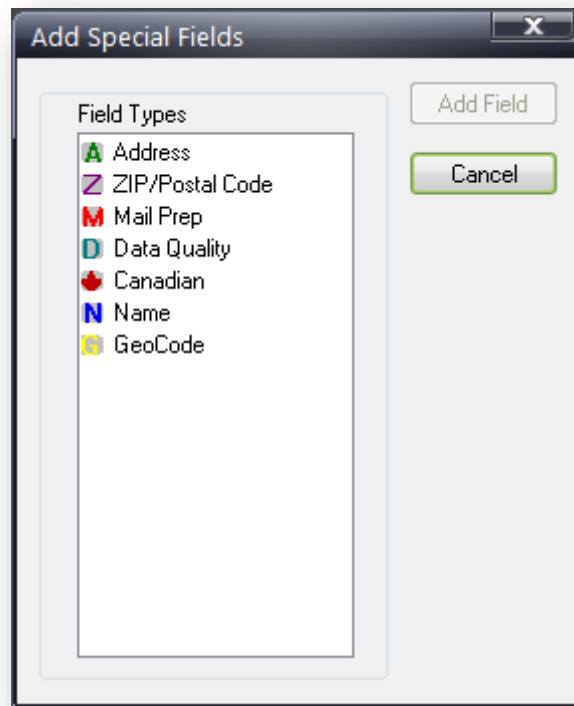


To delete a field:

1. Highlight the field to be deleted
2. Click on **Delete** and the field will be removed from the list of fields

To Add a Special Field:

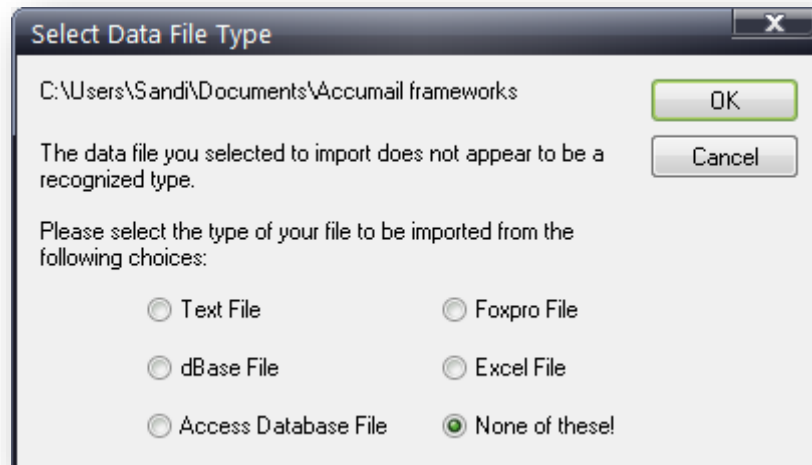
1. Click on the **Add Special** button
2. The following Screen will appear:



3. Double click on a category and the fields for that category will appear
4. Click on the field to add to the field list
5. Click **OK**

## IMPORT

A mailing list must be imported into AccuMail frameworks and converted to a .MDB file format that has the file extension of .fwdb. The following file formats can be imported into AccuMail frameworks: Text (.TXT OR .CSV), dBase (.DBF), Access (.MDB), FoxPro (.DBF), or Excel (97-2003) (.XLS). If the file format is different than any listed above, the following message appears:



You will need to use the application the file came from and “save as” or export in one of the listed formats.

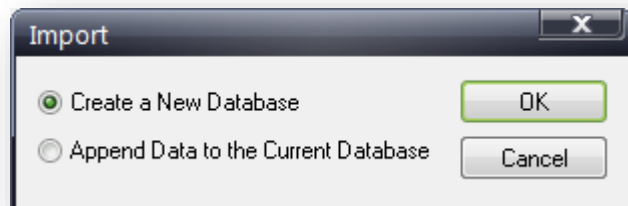
## IMPORT A DELIMITED FILE

---

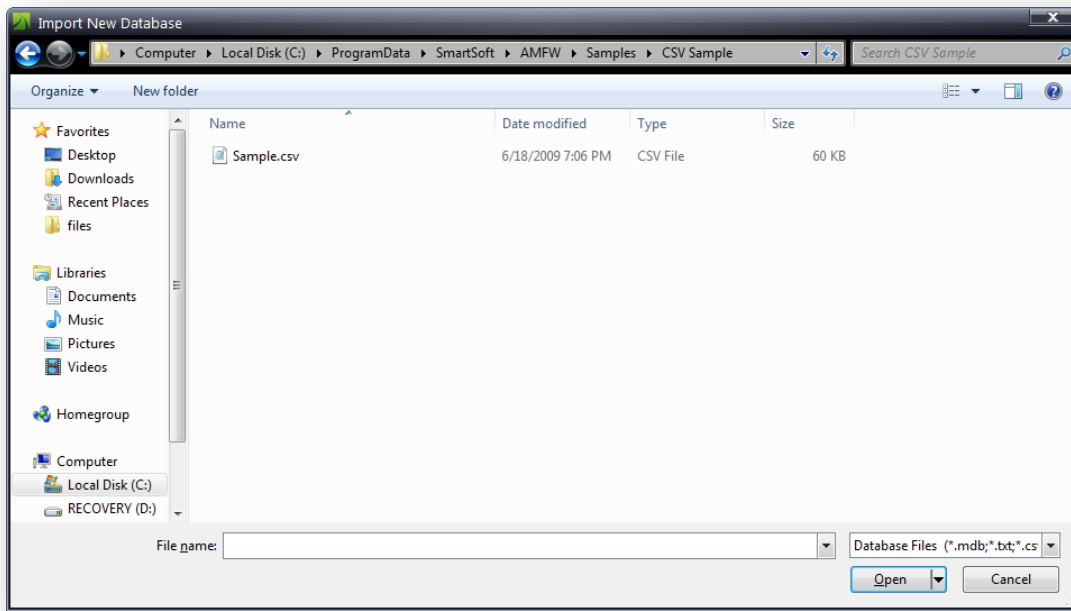
To import a new file, click on the



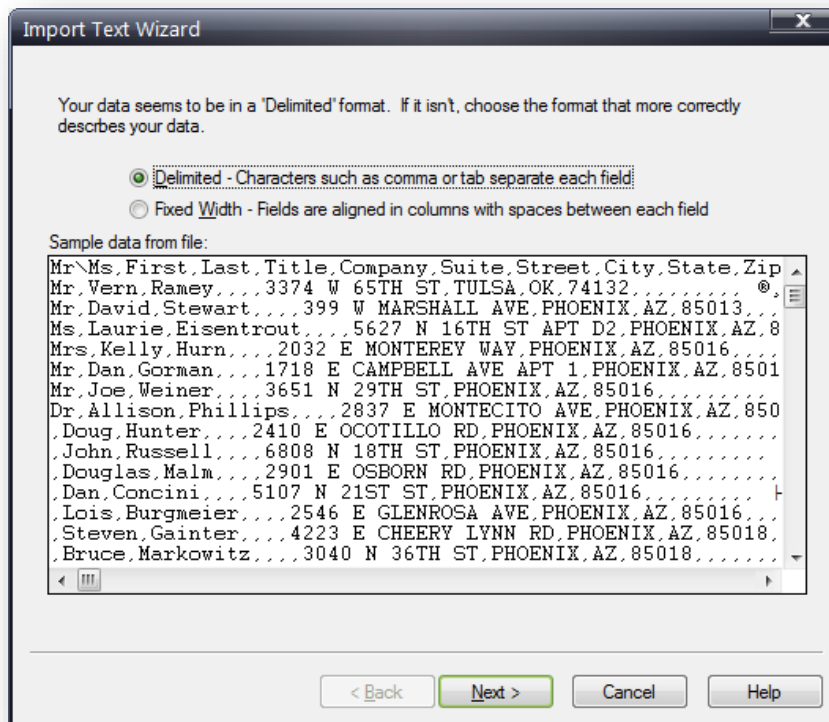
button. The **Import** screen appears. This screen allows you to import a new list or add records to an existing list. Select the correct option and click **OK**.



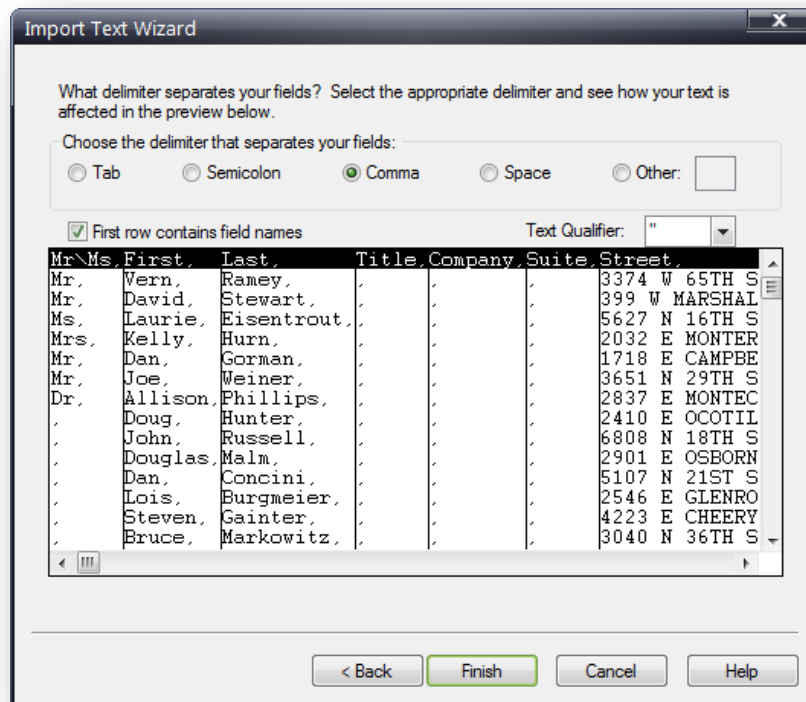
The **Import New Database** screen appears.



This screen allows you to browse your computer to find the file to import. Browse to the correct file (for this purpose, we will select the “Sample.csv” file in the Sample folder). Double left click or click on the **Open** button and the following screen will appear.

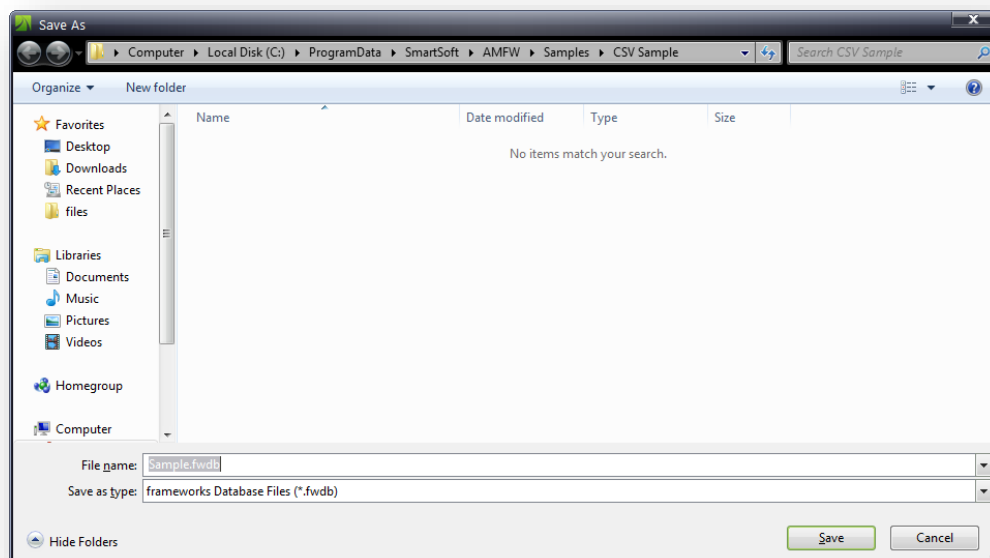


AccuMail frameworks will attempt to identify the format of the source file. In this case, it identifies the file format as a delimited format with instructions to choose a different format if it identified the format incorrectly. Click the **Next** button and the following screen appears:



Select the delimiter character and preview the separating of the data into columns. Click the check box labeled **First row contains field names** if your list has a header record that contains the field names for your data. When the correct delimiter is selected, click on the **Finish** button.

The following screen appears which will allow you to save the file in the AccuMail frameworks .fwdb format. This screen will allow you to browse to the desired folder on your hard drive to save the file and to provide a file name. In this case, the path the file will be saved to is C:\Program Files\Datatech SmartSoft\AMFW\Sample Lists and the file name is samples.fwdb. Click the **Save** button when the path and file name is correct.

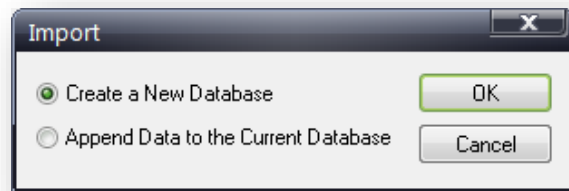


## IMPORT A FIXED WIDTH FILE

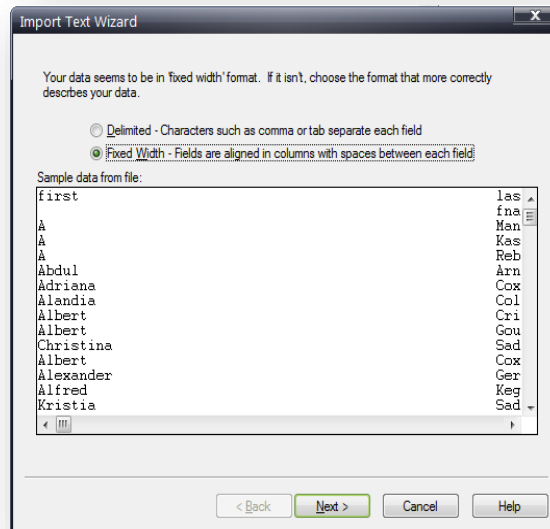
To import a fixed width file, click on the



button. The Import New Database screen appears. This screen allows you to import a new list or add records to an existing list. Select the correct option and click **OK**.

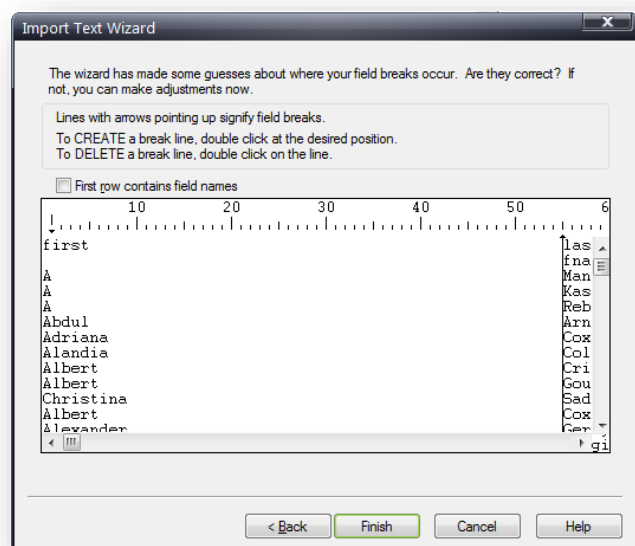


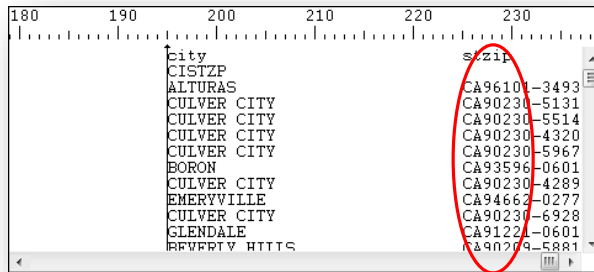
The import new database screen appears. This screen allows you to browse your computer to find the file to import. Browse to the correct file. Double left click or click on the **Open** button and the following screen will appear.



AccuMail frameworks will attempt to identify the format of the source file. In this case, it identifies the file format as a fixed width format with instructions to choose a different format if it identified the format incorrectly. Click the **Next** button and the following screen appears:

This screen will give you the opportunity to create break lines, this will tell AccuMail frameworks where your fields start and end. Arrow through your fields to make sure all breaks are in the correct place. To place a break line simply double left click on the desired location. To remove a break line, double click on the existing line.

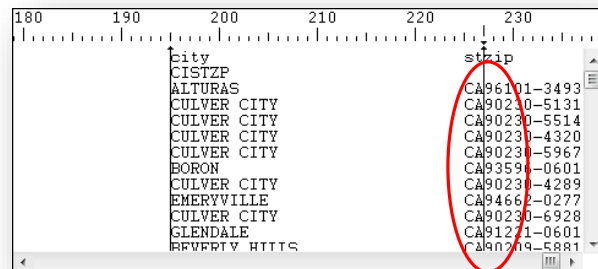




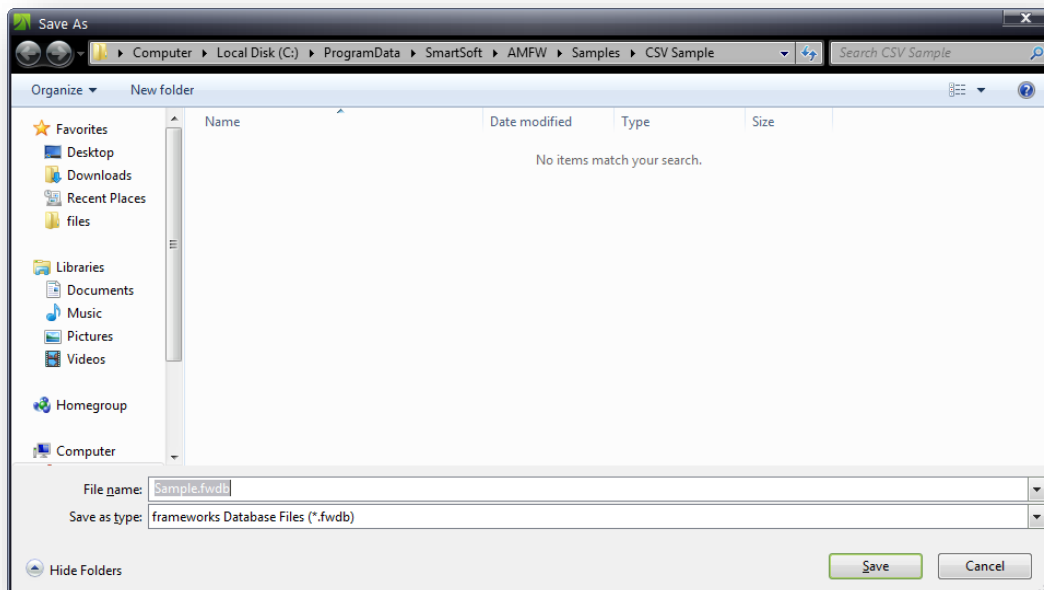
For example, in this screen there needs to be a break between the State and ZIPcode.

Place your cursor on the space between these two fields and double click.

Once you are finished setting the break lines click **Finish**.



The following screen appears which will allow you to save the file in the AccuMail frameworks .fwdb format.



This screen will allow you to browse to the desired folder on your hard drive to save the file and to provide a file name. Click the **Save** button when the path and file name is correct.



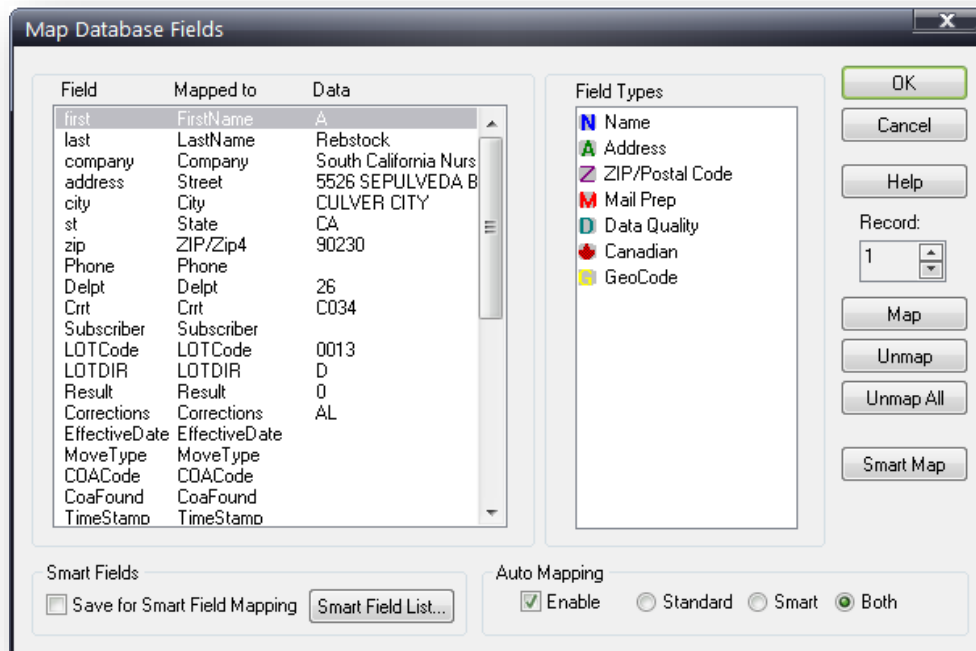
**frameworks Tip!** AccuMail Frameworks can import the following formats:  
CSV, Fixed Width, ArcList For DOS (.ds2), dBase (.dbf), Access (.Mdb) files

## MAP FIELDS

In order for AccuMail frameworks to recognize your data correctly, you need to map your fields. When you



click on the icon on the Toolbar, the following screen will appear:



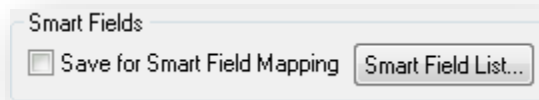
This Window is separated into three sections:

1. The large section on the left is your list with your data. The field names in your database are on the left under the column headed **Field**. The center shows the mapped field names under the column headed **Mapped to**. The right shows the text for a record under the column headed **Data**.
2. The center section shows the AccuMail frameworks field type names under the column headed **Field Types**. These are the field names AccuMail frameworks uses.
3. The right section contains the action buttons. These do the following:
  - **OK:** Closes the Window saving your changes
  - **Cancel:** Closes the Window without saving your changes
  - **Record:** Scrolls through the records in your list so the text of the fields are visible in the Data column
  - **Map:** Connects the selected Field Type name to the data
  - **Unmap:** Remove the Mapped To field for the selected field




- **Unmap All:** Remove all Mapping for your list
- **Smart Map:** Will automatically try to map your highlighted field to the appropriate Field Type

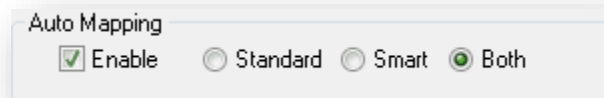
This section on the bottom of the screen is for Smart Mapping your data fields.



Smart Mapping allows your fields to be automatically mapped, if field names are not part of the default field names in AccuMail frameworks. You can save your already mapped fields for future use by selecting **Save for Smart Field Mapping**.

You can also view the Smart Field List, by clicking on the  button.

The other section on the bottom of the screen is for Auto Mapping your data fields.



AccuMail frameworks will automatically try to map your fields if you have **Enable** checked. There are two options for **Auto Mapping**:

**Standard** – Uses AccuMail frameworks default list of fields to auto map

**Smart** – Uses Smart Map fields to auto map. For more information on **Smart Mapping** see the **Smart Mapping** section.

If a field you have does not automatically get mapped, you can do this manually. To do this we have organized the field names into categories. Simply double click on the category your field matches in then click on the field you would like to map, and then click **Map**.

For example, if you would like to map ZIP to ZIP/ZIP4, instead of just the ZIP. Double click on the Category **ZIP/Postal Code**, and then click on the field **ZIP/ZIP4**. On the left side of the window click on your field, then click on the Button **Map**.

AccuMail frameworks also give you the option to drag and drop the field types into the appropriate field.

Click **OK** when finished doing your Field Mapping.

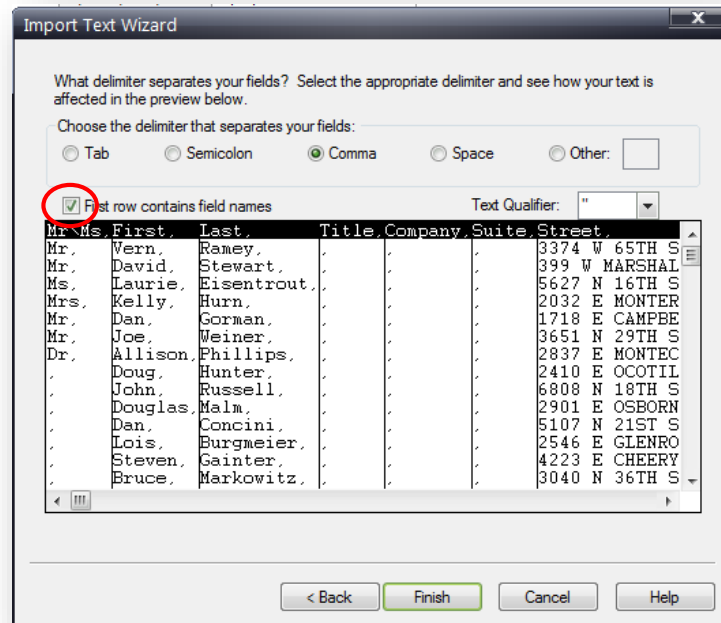


**frameworks Tip!** You can also double click on the fields to map them.

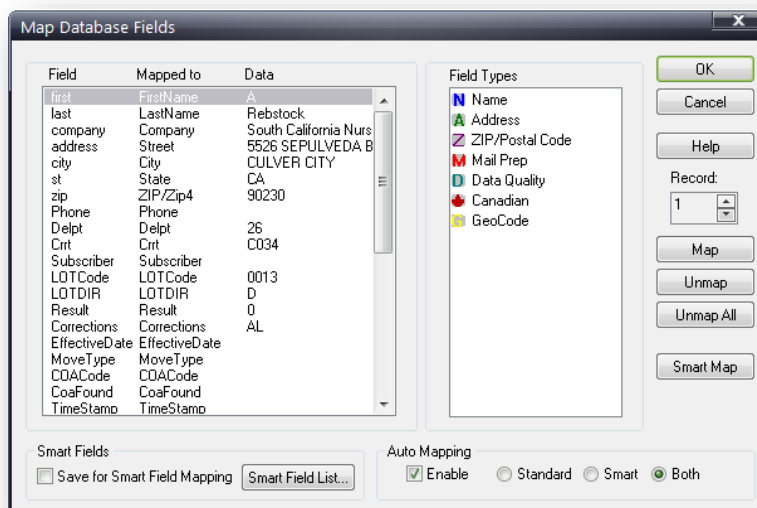
## SMART MAPPING

When importing a Comma delimited (CSV) list that contains a field names “header record”, AccuMail frameworks can automatically map database field types with known field names. To do this, on the import of the CSV list, check the **First row contains field names** box in the Import Text Assistant. The field names in the CSV header record will be checked to the “Smart mapping list” and those names found will be automatically mapped to the appropriate database names. (The “Smart mapping list” contains all field type database names used in mapping data such as FirstName, LastName.)

Import Text Assistant:

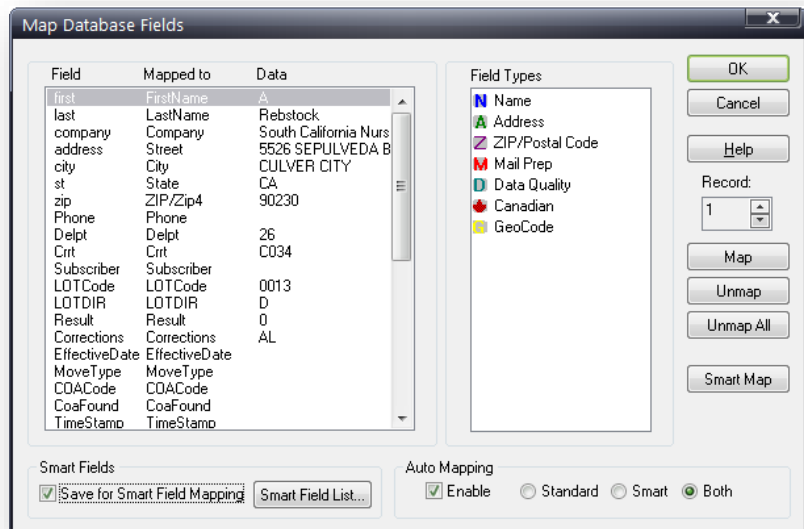


Data Mapping window:



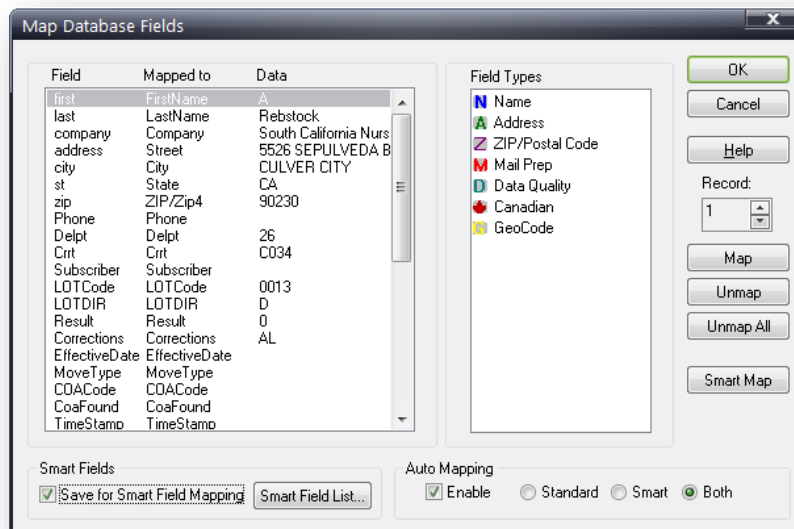
## Adding additional field names to the Smart Mapping list:

Additional csv field name matching can be added to the Smart mapping list. If the csv header field has a name for a field that is not in the Smart Mapping list it can be added for future imports auto mapping. To do this, manually map the unknown field to a known field type from the Map Database Fields window. Check the box **Save for Smart Field Mapping**. Click **OK**.



Example: Two field names from the csv header are *"NameFirst"* and *"NameSecond"*. These are not in the Smart Mapping list so they do not get auto mapped.

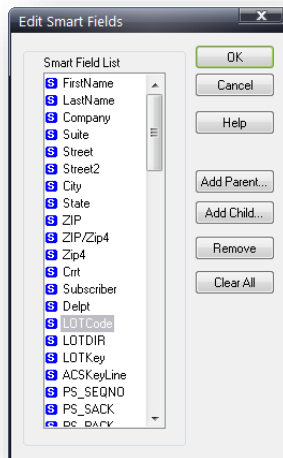
There are two ways to add them to the Smart Mapping list for future auto mapping



The first way is to manually map them via the Map Database Fields window. Here I've mapped *"NameFirst"* to the field type *"FirstName"* and *"NameLast"* to *"LastName"*. Check the **Save for Smart Field Mapping** box and click **OK**. The csv field name *"NameFirst"* will now auto map to the field type *"FirstName"* and *"NameLast"* to *"LastName"* in future auto mapping.

The Second way to map these fields is to select **Smart Field List...**.

When this button is clicked the following screen will appear:



**OK:** Saves and Closes this screen

**Cancel:** Closes Screen without saving

**Help:** Opens the help screen for this window

**Add Parent:** Adds a Field Name

**Add Child:** Adds a Smart Mapped field

**Remove:** Deletes the Parent field or the Child Field

**Clear All:** Removes all fields and smart mapped fields

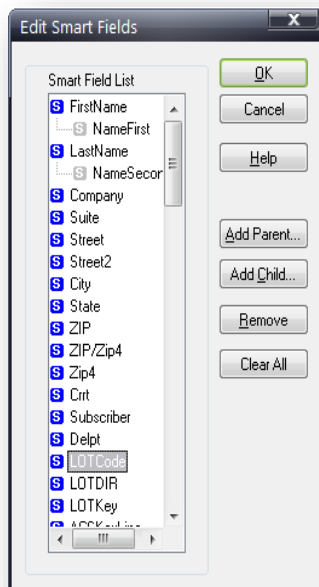
To add **NameFirst** to the Smart Mapped fields, click on the Parent field name, **FirstName**.

Then click on **Add Child...** and type in **NameFirst**.

To add **NameSecond** to the Smart Mapped fields, click on the Parent field name, **LastName**.

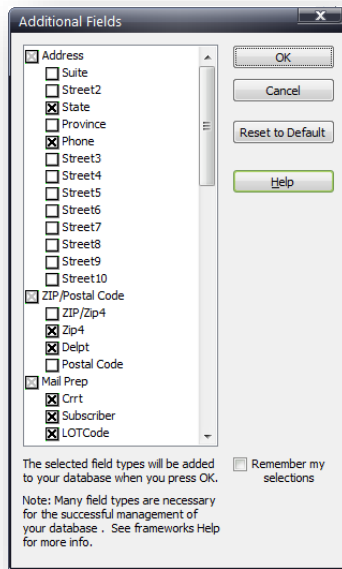
Then click on **Add Child...** and type in **NameSecond**.

The Edit Smart Fields will now look like:



## ADDITIONAL FIELDS

After importing a new list you will see the following screen:



**OK:** Saves field choices and opens list

**Cancel:** Does not add any additional fields

**Reset to Default:** Reverts selected fields to the default fields, see list below

**Help:** Opens help for this topic

This screen will allow you to select additional fields to add to your database. These fields are required for other processes you will do to your list. Here is a list of the available and which processes they are required for:

### Name

FirstName*	First Name
LastName*	Last Name
Company	Company
FullName	Full Name
MiddleName	Middle Name

### Address

Suite	Suite
Street*	Street
Street2	Street 2
City*	City
State*	State
Province	Province (frameworks Canada)
Phone*	Phone Number
Street3	Street 3
Street4	Street 4
Street5	Street 5
Street6	Street 6
Street7	Street 7
Street8	Street 8

Street9	Street 9
Street10	Street 10
<b>ZIP/Postal Code</b>	
ZIP*	5 digit ZIP Code
ZIP/ZIP4	5 digit ZIP Code with plus-four
ZIP4	plus-four
Delpt*	Delivery Point
Postal Code	Postal Code (frameworks Canada)
<b>Mail Prep</b>	
	<b>These fields are used for the Mailing Edition</b>
Crrt*	Carrier Route
Subscriber*	Subscriber information
LOTCode*	Line of Travel code
LOTDIR*	Line of Travel Directional Marker
LOTKey	Line of Travel Keyline
ACSKeyLine	Address Change Service Keyline
PS_SEQNO*	Presort Sequence Number
PS_SACK*	Presort Sack Number
PS_PACK*	Presort Package Number
PS_PIECE*	Presort Piece number
PS_ENDR*	Presort Endorsement line
WSSCode	Walk Sequence Code
Residential	Residential
<b>Data Quality</b>	
	<b>These fields are used for Address Correction</b>
Result*	Result Code
Corrections*	Correction Codes
Urb	Urbanization
CountyName	County Name
CongressNum	Congressional District Number
DeliverCode	Deliver code
EffectiveDate*	Effective Date (NCOALink)
MoveType*	Move Type (NCOALink)
LACS	Locatable Address Conversion System Code
HouseNum	House Number - when street is parsed
PreDirectional	Pre Directional - when street is parsed
StreetName	Street Name - when street is parsed
PostDirectional	Post Directional - when street is parsed
Suffix	Suffix - when street is parsed
SUD	SUD - - when street is parsed
UnitNum	Unit Number - when street is parsed
LeftOvers	Data is removed during CASS process will be put here
PMB	Private Mail Box
DupeKey	Duplicate Key - Used during duplicate management
COACode*	Change of Address Code (NCOALink)

CoaFound*	True or False field indicating whether a Change of Address was found or not (NCOALink)
TimeStamp*	Time Stamp
DPV*	Delivery Point Validation
DPVFootNote*	Delivery Point Validation Notes
Undeliverable*	Indicated as address is undeliverable
RDI*	Residential Delivery Indicator
Ostreet*	Original Street (NCOALink)
Ocity*	Original City (NCOALink)
Ostate*	Original State (NCOALink)
OZIP*	Original ZIP (NCOALink)
<b>Canadian</b>	<b>These fields are for frameworks Canada</b>
Mode Code	Mode Code
Bag/Bundle	Bag and Bundle numbers
MatchCode	Match Code
Error Code	Error code
Reserved	Reserved for future use
<b>GeoCode</b>	<b>These fields are for the GeoCode Module</b>
PMSA	Primary Metropolitan Statistical Area
CMSA	Consolidated Metropolitan Statistical Area
CensusTrack	Census Track information
CensusBlock	Census Block information
CensusSide	Census Side information
GeoResult	Result, will be blank if found else 99
Latitude	Latitude lines run horizontally
Longitude	Longitude lines run vertically

\*These fields are the default fields and will be automatically added to your list if they were not mapped.

On the Additional Field screen you can select other fields to be created or remove fields if you do not need them.

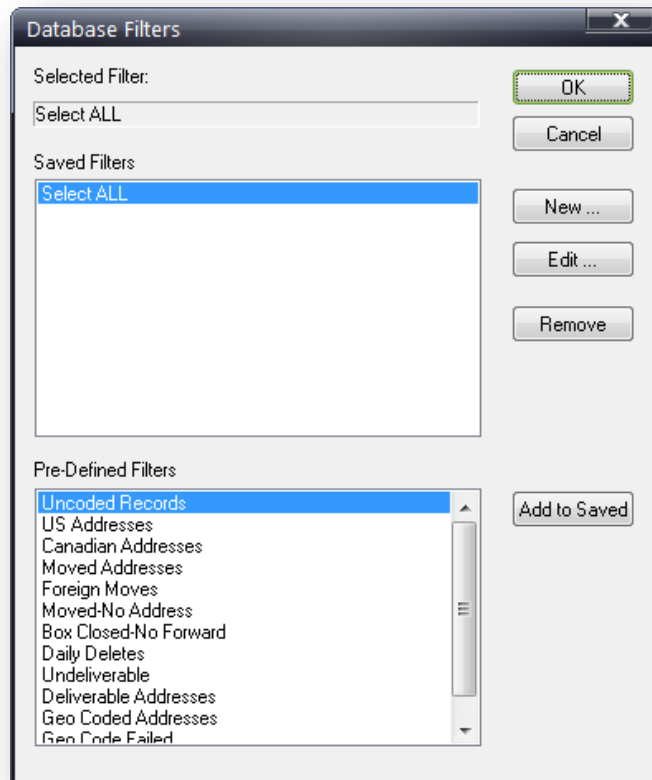


You can select a specific set of records in the open database by clicking the Filter icon .

The Database Filter window appears which lists the active filter (at the top), the saved filters (in the middle) and pre-defined filters (on the bottom).

The buttons on the right are:

- **OK:** Uses the selected Filter for your Database
- **Cancel:** Closes the Filter Window without using the selected Filter
- **New:** Creates a new Filter
- **Edit:** Opens selected Filter for editing
- **Remove:** Removes the selected Filter
- **Add to Saved:** Will save the highlighted Pre-defined Filter into the Saved Filter



Click on the **New** button to create a new custom filter. Click the **Select ONLY Records Where** radio button to enter the criteria desired.



Filter - \*\* NEW \*\*

Selection Statements

☒ Select ALL Records ☐ Select ONLY Records Where:

☒ And ☐ Or

Field name: Mr\Ms Is: Value Field Blank

Mr\Ms

Add Condition Remove Add Special...

Ordering

Field 1: Field 2:

☒ Order by: Mr\Ms ☐ And: Mr\Ms

☒ Ascending ☐ Descending

The “Field name” drop down menu lists all of the fields available in a specific list from which to choose the field to set for a specific condition.

You can also set the Boolean condition of “AND” or “OR” by clicking the appropriate radio button.

“Is” drop down menu sets the condition state:

- = Equals
- > Greater than
- < Less than
- >= Greater than or equal to
- <= Less than or equal to
- Like Is similar
- Is Equals
- Is Not Does not equal

You can set the order of the resulting list under the Ordering section. Select the field to order the records by clicking on **Order by** and selecting the field name.

You can select a secondary sort by clicking **AND** to select a secondary field. To sort by Ascending or Descending order, click on the appropriate radio button.

Click the **Add Condition** button to add a specific criterion to a filter. More than one condition can be added to a filter.

Remove deletes a specific criterion from the filter.

Add Special allows you to select Only US records or only Canadian records in your list.

This Window shows the criteria set for finding all of the records in Arizona with the first name of Robert or Bob. The first line sets the condition that the State field must be "AZ". The second line sets the additional condition that the First field must be "Robert" and the third line sets the additional condition OR "Bob". The result of this filter is a display of all records with addresses in Arizona and first name is Robert or Bob. The records are listed by City in descending order.

Filter - \*\* NEW \*\*

Selection Statements

☐ Select ALL Records ☒ Select ONLY Records Where:

☐ And ☒ Or

Field name Is Value ☒ Field ☐ Blank

FirstName = Bob

Mr\Ms

AND	[State]	=	'AZ'
	[First]	=	'Robert'
OR	[First]	=	'Bob'

Add Condition

Remove

Add Special...

Ordering

Field 1: Field 2:

☒ Order by: City ☐ And: Mr\Ms

☒ Ascending ☐ Descending

OK

Cancel

To toggle back to the full list, click on the **Filter** icon and click the **Select All Records** radio button.

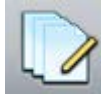
Click on the **Pre-Defined** radio button to select records from the validation and NCOA<sup>Link</sup> processes. The pre-defined filters are:

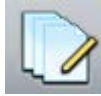
- Uncoded Records - Records that did not pass CASS Certification and do not have a plus-four
- US Addresses - All Address from within the United States
- Canadian Addresses - All Addresses from within Canada
- Moved Addresses - Records that were returned with NCOA<sup>Link</sup> changes
- Foreign Moves - Records marked with Foreign Moves
- Moved - No Address - Records marked with moved no forwarding address given
- Box Closed – No Forward - Records marked that the Box is closed with no forwarding address
- Daily Deletes - Shows records that the Change of Address is pending deletion from the Change of Address master file and that no mail may be forwarded from this address.



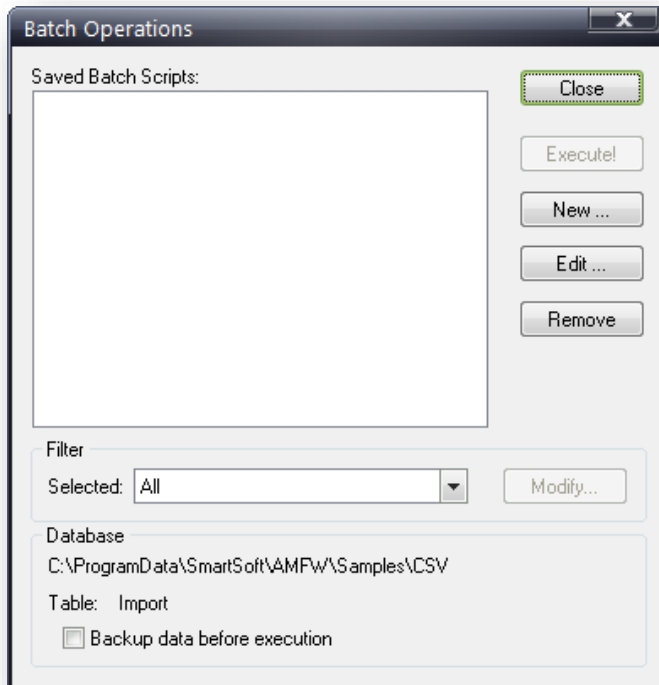
**frameworks Tip!** You can add predefined filters to your list of filter by double clicking on the desired predefined filter.

## BATCH UPDATE



Click on the  icon to enter the Batch Update mode. Batch Update allows the modification of records as a group. This can be used to fill in missing data in a field, such as adding the city name if all of the records are in the same city.

When the icon is clicked, the **Batch Operations** screen appears.



A list of Saved Batch Scripts is shown on the left.

The filter section allows you to select a part of your list or the entire database. To create a filter for your Batch Process see the section on [Filters](#).

The bottom portion of the screen shows the details on the particular database you are working in. It also gives you the option of backing up your database prior to running the Batch Process. This is highly recommended.

The Buttons on the right side of the screen do the following:

- Close: Closes **the Batch Operations** window
- Execute: Runs the selected **Saved Batch Script**
- New: Creates a new **Saved Batch Script**
- Edit: Edits the selected **Saved Batch Script**
- Remove: Removes the selected **Saved Batch Script**

To create a New Batch Update, do the following steps:

1. Click on **New**
2. When **New** is clicked, you can select to modify records or to delete records
3. To modify the record, click on the **Replace** the content of and choose the field you want to modify
4. Then select whether to replace the field with Value (input specific text) or with the contents of another field
5. Then click on **Add** to list of Actions
6. To remove a specific Action, click on **Remove**
7. You can select to run the update on all of the records or setup a filter to run the batch update on records that meet a specific criterion
8. Once the batch update is set, click **OK**
9. It may be a good idea to backup your data before running the Batch Update. Click on the **Backup Data before Execution** check box
10. Then click on the **Execute** button

For Example, the batch update below will replace the contents of the field Note with the text "April 25 2009" and replace the contents of the field 1001 with the contents of the Suite field. The filter is set to All records.

Batch - \*\* NEW \*\*

For each record in the set:

☒ Modify the record ☐ Delete the record

Modify

Target Field: 1001

☒ Simple Replacement:

Replace the contents with: ☐ Value April 24 2009 ☒ The contents of Suite

☐ Replacement Script:

Add to List of Actions

List of Actions

Replace the contents of Note with "April 24 2009"

Replace the contents of 1001 with the contents of Suite

Remove Action

Filter

Selected: All

Change...

## ADD RECORD




Click on the Add record icon to add a new address to the open list. The cursor will move to the bottom of the existing list. Type in the new data, being sure to add data in the correct field column. You must have Enable Grid View Edit selected in the Database List in order to be able to modify the list.

## DELETE RECORD



Click on the Delete record icon to remove a record from the open list. Click on the correct records and then click on the delete record icon. A prompt will appear asking if you are sure. If so, say yes and the record is removed.

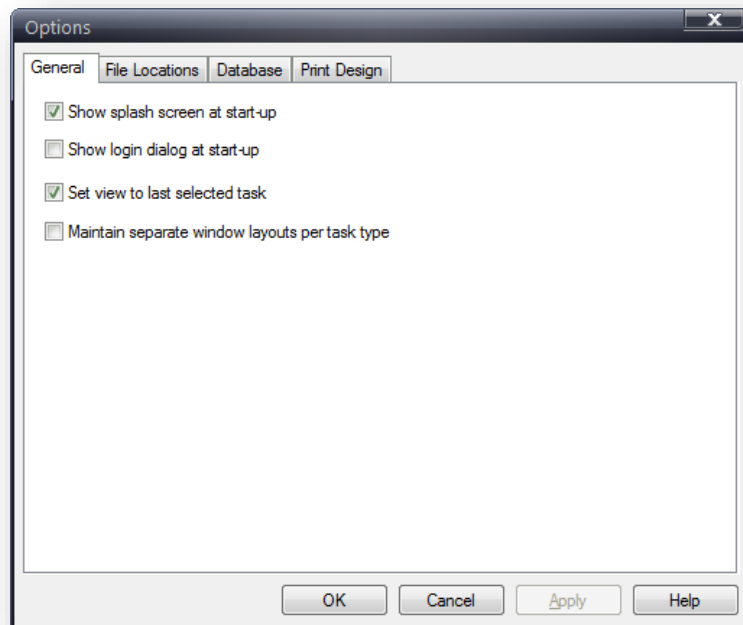
## OPTIONS

To view the selected option in AccuMail frameworks, simply click on the  icon on the Toolbar, or go to **Tools | Options**.

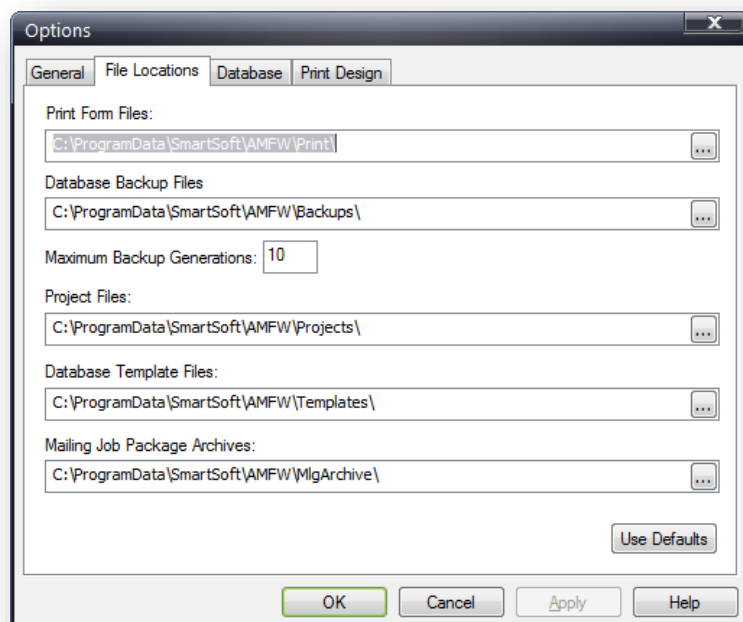
This is used to set the options for using the program. Click on the **plus** sign to the right of the main headings in the options to show the options or click on the **minus** sign to close them.

Click on the tab in the options window to show the options.

1) **General Settings:** This sets up what happens when you launch AccuMail frameworks. Check the box to select the option. The options set whether the opening splash screen plays, show login prompt at start up, shows the last selected task that was run, opens multiple windows for different tasks.



2) **Files Settings:** This sets the default paths for saving folders and for the number of backups retained.



### 3) Database List View Settings:

The options for this screen are:

#### **Reopen the last opened database**

- This option will make automatically open the last database used when frameworks opens

#### **Confirm database record deletions**

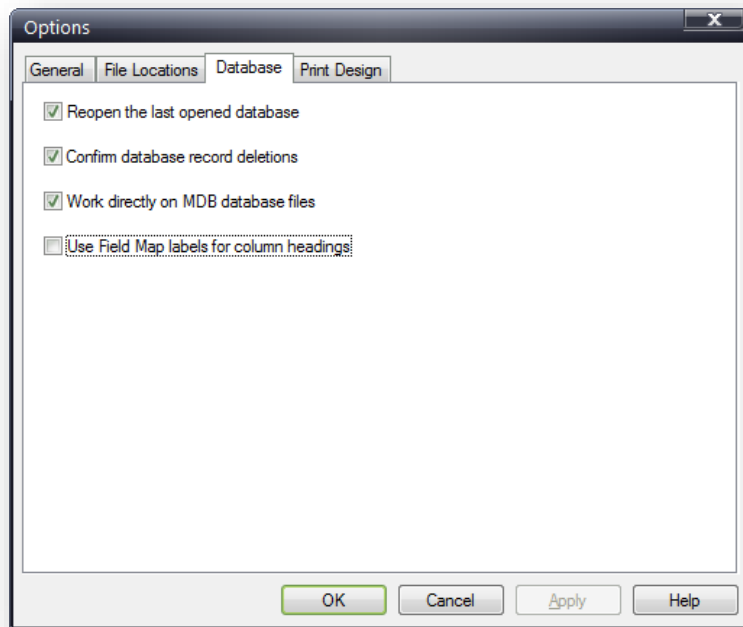
- This option will prompt you to accept record deletion when deleting them in a list

#### **Work directly on MDB database files**

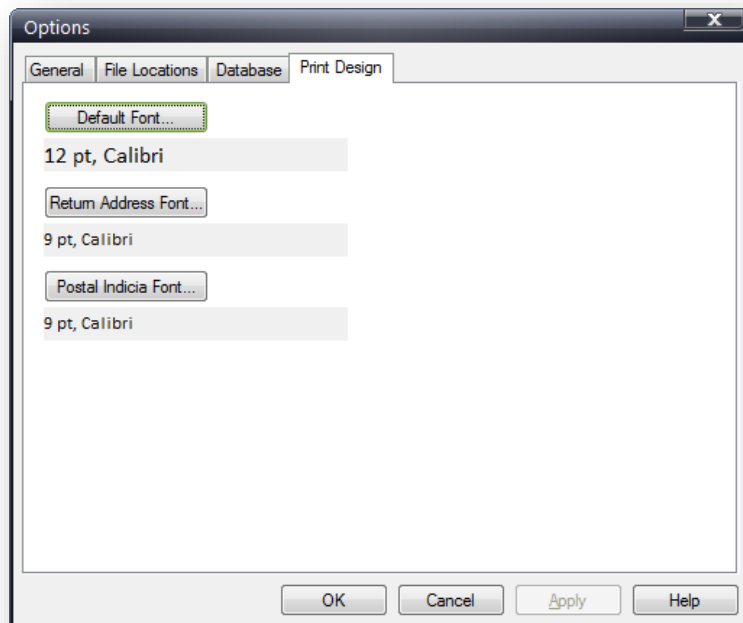
- This option allows you to work directly with Access database (MDB) files. This option is by default off and should only be used if necessary. If you are going to work directly on Access Files please backup your database before opening as any changes made to the database will be permanent.

**Use Field Map labels for column headings** - This option will show the column labels by using the Field Map names as opposed to the header in the imported database


**Show Additional Fields Dialog during Import** - This will turn on or off the option to show the additional field dialog while importing your database



4) **Print Design:** This screen determines the default font for reports.





To view the **User Info** option in AccuMail frameworks, simply click on the  icon on the toolbar, or go to Tools | **User Info**.

The System User Info screen is used to setup the information that appears on the CASS and Postage Statement reports.

You can choose from multiple entries by either Name or Company. Click on the radio button to make your selection.

The buttons at the bottom of the screen do the following:

- **New:** adds a new name to the user records by clicking on and entering the information in the Details box.
- **Remove:** deletes an entry from the user records
- **Ok:** Saves your changes and closes the window.
- **Cancel:** Closes the window without saving the changes.
- **Apply:** Saves the changes but stays in the System User Info window for additional changes. You will want to set up your User Information

**System User Info**

User Records:

Sandi Devlin
--------------

Display by: ☒ Name ☐ Company

Details:

Name	Sandi Devlin
Company	Datatech Smartsoft
Address Line 1	5951 Encina Rd
Address Line 2	Ste 201
City	
State	
Zip	
Phone	888 227 7221
Email	

**USPS Information**

Customer Number	
CAPS Customer ID	
Dun & Bradstreet Num.	
Permit Num.	
Fed. Agency Code	
Non Profit Authorization Number	
USPS Mailer ID	
USPS CRID	
PostalONE! User License	


**General Information**  
General information about this user

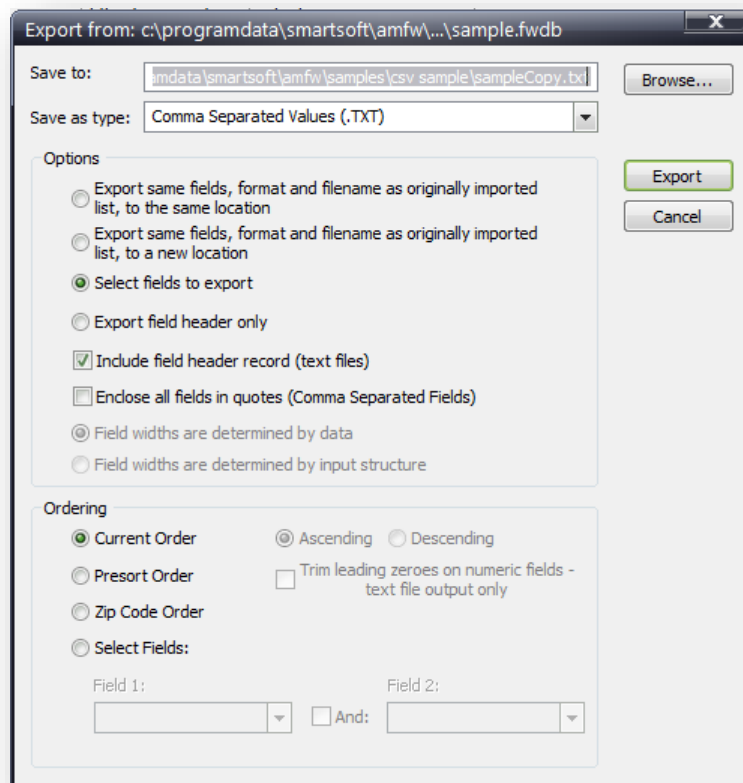
New Remove **OK** Cancel Apply

Click on the **plus sign** to the right of the main headings in the options to show the options or click on the **minus sign** to close them.



## EXPORT

To Export your list, click on **Database List** on the Task Bar then click **Export**. The other way to export the database is to click on  toolbar. The following screen will appear:



You have the following options for exporting:

### **Export same fields, format and filename as originally imported list, to the same location**

This option will export the same fields you imported back in to your original file name and type. It will overwrite the input file.

### **Export same fields, format and filename as originally imported list, to a new location**

This option will export the same fields you imported into the same type of file but will allow you to choose where you will save the file.

### **Select fields to export**

This option will allow you to choose the specific fields to export. When this option is selected you will need to save the database as a new file. You can select the file type in the **Save as type** box.

### **Export field header only**

This option will only export the field header record; no actual data will be exported.

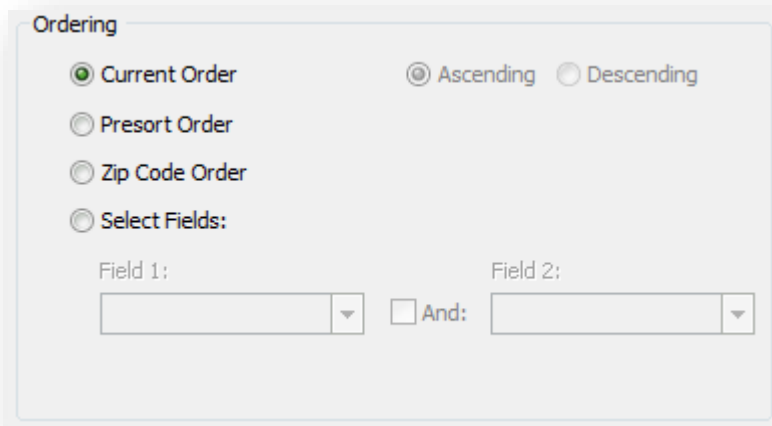
### **Include field header record (text files)**

This option will include the field header information for the list; this only applies to text files.

### **Enclose all fields in quotes (Comma Separated Fields)**

This option will put Quotes (") around all data being exported.

The following section will allow you select the order in which your list is exported:

A dialog box titled "Ordering" with a light gray background. It contains four radio button options: "Current Order" (selected), "Presort Order", "Zip Code Order", and "Select Fields:". To the right of the "Current Order" option are two radio button options: "Ascending" (selected) and "Descending". Below the "Select Fields:" option, there are two text input fields labeled "Field 1:" and "Field 2:". Between these two fields is a checkbox labeled "And:". Each text input field has a small downward arrow on its right side, indicating a dropdown menu.

You can select one of the following:

**Current Order** – This option will export the list using the current order.

**Presort Order** – This option will export your list using the most recent presort run.

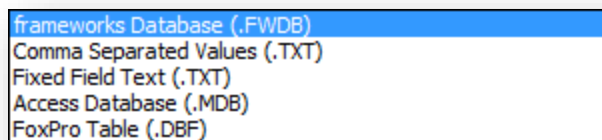
**Zip Code Order** – This option will export your list in Zip Code order.

**Select specific fields** – This option will allow you to select up to two fields for ordering.

You can also select whether you sort via **Ascending** or **Descending** order.

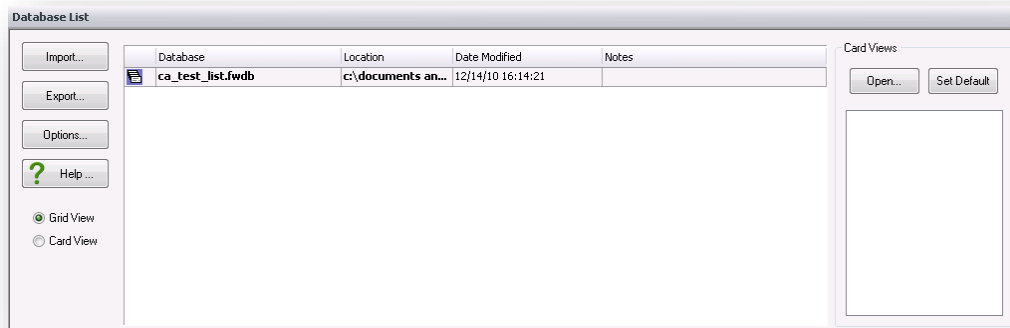
Depending on which option you choose the **Save to:** and **Save as type** will be available.

The following file types are currently available in AccuMail frameworks:




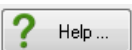
- 
- A list of file types displayed in a window. The first item, "frameworks Database (.FWDB)", is highlighted with a blue background. The other items are "Comma Separated Values (.TXT)", "Fixed Field Text (.TXT)", "Access Database (.MDB)", and "FoxPro Table (.DBF)".
- frameworks Database (.FWDB)
  - Comma Separated Values (.TXT)
  - Fixed Field Text (.TXT)
  - Access Database (.MDB)
  - FoxPro Table (.DBF)

## DATABASE LIST

The **Database List** task shows you the databases you have opened and allows you to edit the list of available databases.



On this task you can:

-  Import a new database
-  Export an existing database
-  Edit **Database List Options**
-  Shows the help topic for this task
- ☒ Grid View ☐ Card View Allows you to open the database in **Grid View** or **Card View**. If you choose **Card View** the box on the right will allow you to select the specific **Card View** to open.

The center portion of this Task shows the database that is currently open.



The left portion shows any available Card Views for a specific list. This allows you to open them immediately.



**frameworks Tip!** To change the order of the lists viewed simply click on the field name at top, for example to put the list in alphabetical order by list name click on **Database**.

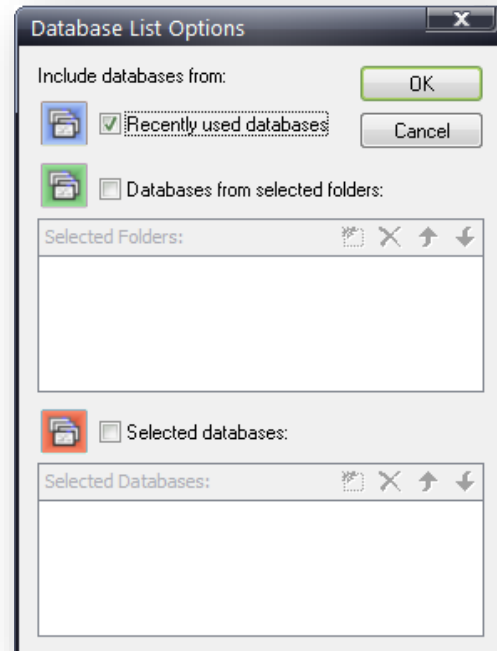
---

## DATABASE LIST OPTIONS

On this screen you can change the way the database are viewed on the **Database List** Task.

There are three options:

1. **Recently used databases:** This option will show all the databases that have been recently used, in the order they were used.
2. **Databases from selected folders:** This option will only show the databases in a selected folder or folders.
3. **Selected databases:** This option will only show the databases you have listed in the box below.

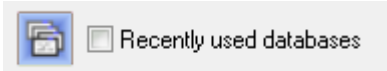


**frameworks Tip!** You can have one option selected or any combination; to show different databases to choose from.

---

## RECENTLY USED DATABASES





This option shows all databases you recently opened. It will list them in order of last opened. To enable it place a check mark in the box below:

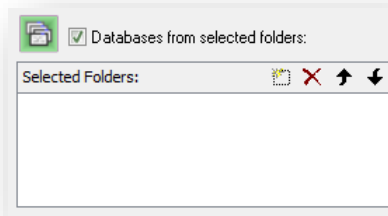


## DATABASES FROM SELECTED FOLDERS

---

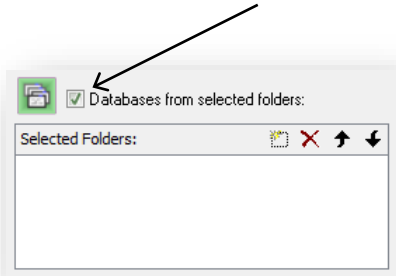
This option allows you to select certain folders and only view the databases from those folders.



-  Add new folder
-  Delete folder
-  Move folder up
-  Move folder down

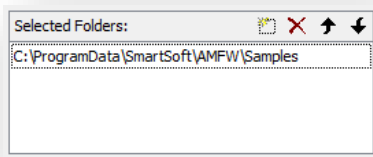


To enable this option do the following:

1. Place a check in this box



2. Click on the  button to add a folder
3. Click on the  button to browse for the folder to add to the list
4. Once you select the folder, this section now looks like:



5. Repeat steps 2 thru 4 to add additional folders

## SELECTED DATABASES

---

This option allows you to view certain databases.



Add new file



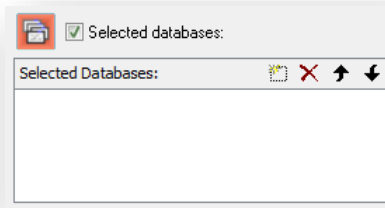
Delete file



Move file up

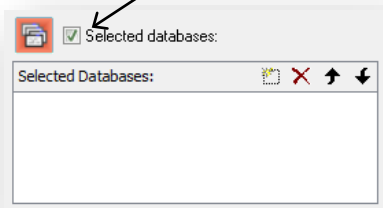




Move file down

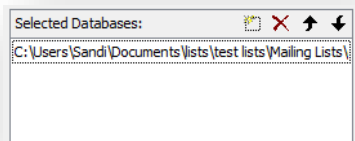


To enable this option do the following:

1. Place a check in this box



2. Click on the  button to add a database
3. Click on the  button to browse for the database to add to the list
4. Once you select the database, this section now looks like:

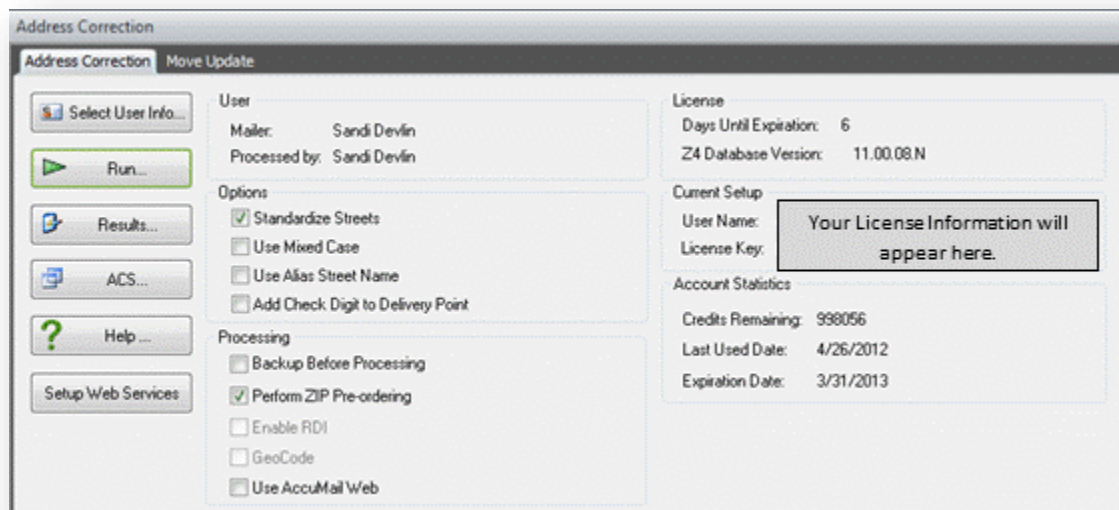


5. Repeat steps 2 thru 4 to add additional databases


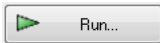

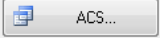
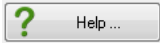

## ADDRESS CORRECTION

During validation, AccuMail frameworks will look at up to 10 Address fields for data beginning in the STREET field and will continue checking STREET2 and SUITE/APT until it finds a valid address match. When AccuMail frameworks finds a match in any of the aforementioned fields, the validated address is swapped with the data in the STREET field. If an apartment, suite or building number is required to validate an address, AccuMail frameworks will search the address fields to the right of the field where the data is located and combine with the data in the STREET field to complete validation.

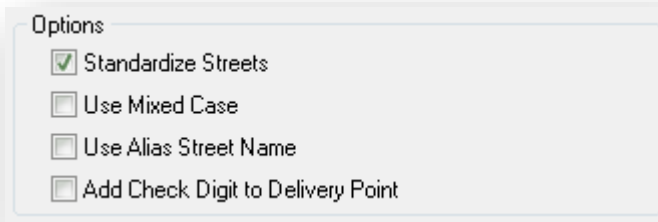
When records are processed, AccuMail frameworks will determine if the record is assigned a plus-four or does not get a plus-four assigned. AccuMail frameworks outputs a specific error and warning code that can be used to determine what exactly took place during validation. To see these codes, you must have a field mapped to RESULT field. For a complete listing of the codes and what they mean, see **Return Codes**.



The Address Correction screen has several buttons that are used during the address correction process. The buttons are defined below.

	Allows you to select the Mailer and Preparer to be printed on the CASS 3553 Form
	Starts the validation process for the active database. At the end of the process, a statistics screen appears. You can choose to view the CASS Certificate which will allow you to print a PDF of the CASS Certificate.
	Allows you to view the Results of your Address Correction
	Allows you to import your Address Change Service (ACS) file from the United States Postal Service into your database
	Opens the help documentation
	Opens the AccuMail frameworks Web Services Setup screen

## ADDRESS CORRECTION OPTIONS



The options available in the Address Correction window are separated into categories:

Click on the **Standardize Streets** check box to standardize street addresses. AccuMail frameworks corrects the prefixes, suffixes, directionals, and other abbreviations to standard US Postal Service spellings. It also corrects the spelling

of the street name itself, but does not change the house or street number.

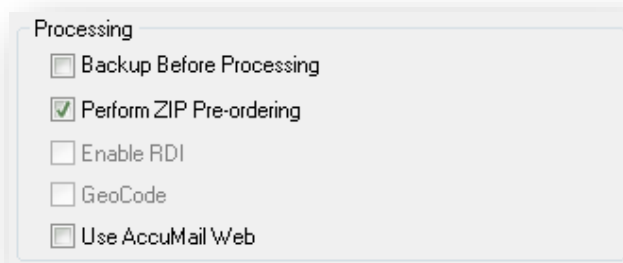
Click on **Use Mixed Case** to select mixed case as the output of your database. If you would rather your list be all Upper Case do not select this option. The address must be assigned a plus-four to be CASS Certified.

Next you can select alias or base street names. An *alias* name is an alternate name for a street. It may be a name by which a street was formerly known, a commonly used nickname for a street, or one the community prefers to use.

The USPS designates one of the street names the "base" street name and calls all other names "alias" street names. For example, in a given ZIP Code, 1st St may be an alias for Martin Luther King Jr Hwy. In this case, the street name has changed. The USPS strongly encourages mailers to use the base street name, Martin Luther King Jr Hwy, because it is the new name. However, the alias 1st St is also allowed.

When you browse through the database, AccuMail frameworks displays both the base and alias street names. However, when you run a task, you need to select which one you want to use.

If you want to retain the alias if it is in the input file when you run a task, click on the **Use Alias Street Name** check box. If you want AccuMail frameworks to always use the base street name preferred by the USPS, leave this option unchecked.



Select **Add Check Digit to Delivery Point** to combine the address check digit for mailing into the field you have mapped to **Delpt** (Delivery Point).

You can also select to create a backup of your database before processing your list.

Also, you can select to **Perform ZIP Pre-Ordering**. This option will allow your list to be put in ZIP Code order prior to processing. This option can increase the speed of your CASS Certifying process.

There is an additional module called RDI available for purchase that will indicate whether an address is a residential or a business address. This may help reduce costs for parcel mailings. We also have an additional module for adding Latitude and Longitude, called **GeoCode**. When you have purchased this option you can enable this option. The option **Use AccuMail Web** becomes selectable when you have purchased the AccuMail frameworks Web Services. This will allow you to use our Web Services Server for CASS Certification as opposed to your local data.



#### User

Mailer: Sandi Devlin  
Processed by: Sandi Devlin

Here you can see the associated Mailer and Processor for this list.

#### License

Days until expiration: 43  
Z4 Database Version: 10.00.19.M

This section shows the days left before the Address correction database expires. It also shows the version of the Address Correction database.

#### Current Setup

User Name:  
License Key: Your License Information will appear here.

#### Account Statistics

Credits Remaining: 998056  
Last Used Date: 4/26/2012  
Expiration Date: 3/31/2013

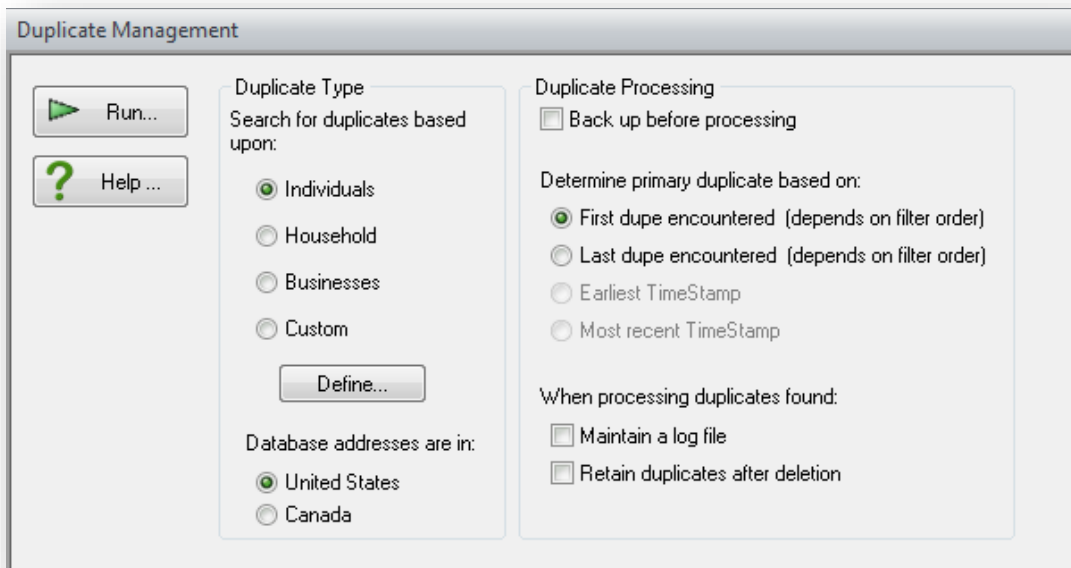
These sections are only shown when AccuMail frameworks Web Services is enabled. The **Current Setup** shows the current User Name and License Key of the Web Service Setup.

The **Account Statistics** section show the Credits left and the Date the service was last used as well as the Expiration Date of the Add-On Module. For more information about AccuMail frameworks

Web Services see the section: **Address Correction using Web Services.**

## DUPLICATE MANAGEMENT

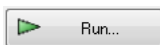
Select Duplicate Management on the Task pane and the following screen will appear:



This screen is separated in to three sections.

1. The action buttons
2. The Duplicate Type
3. The Duplicate Processing

The Buttons do the following:



Runs the Duplicate Management Process with the selected options



Opens the Help topic for this screen.

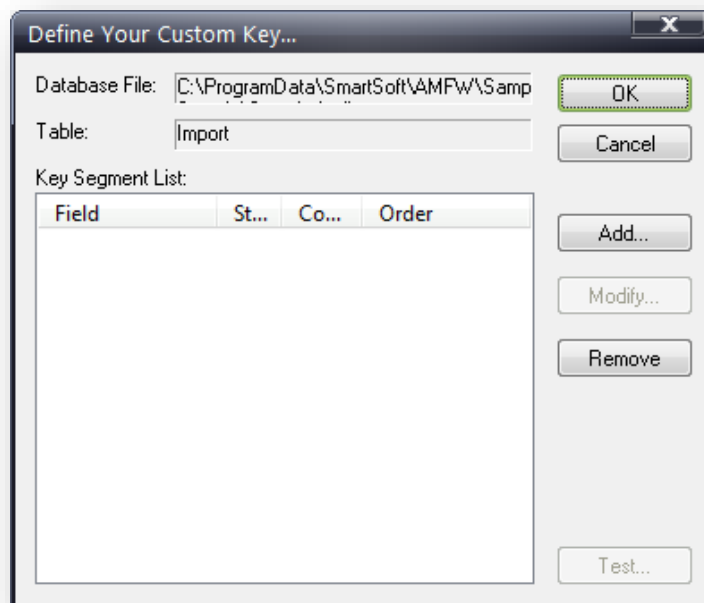
## DUPLICATE TYPE

Here you can run duplicates based on Individuals (First and Last Name), Household (Last Name), Businesses (Company), or build your own Duplicate match code.

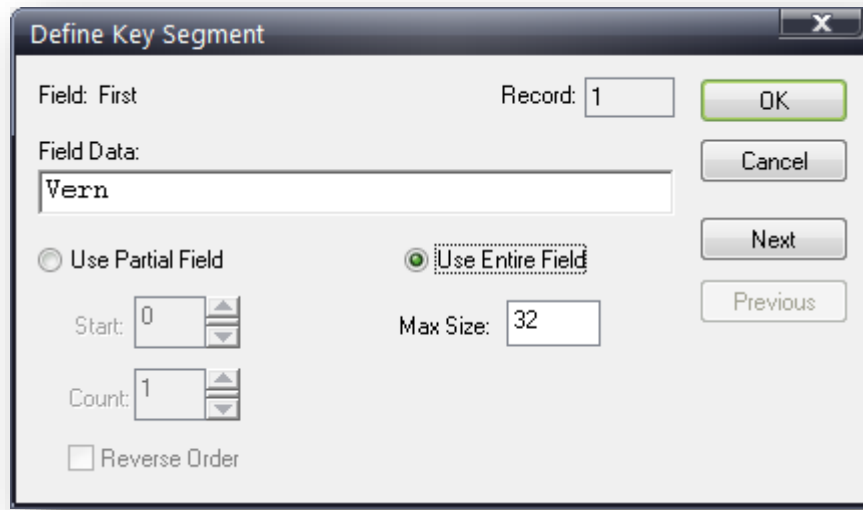
To build a custom match, do the following:

1. Click on the **Custom** radio button
2. Click the **Define** button
3. The **Define your Customer Key** screen displays:

Here is where you setup your customer match key. This screen will allow you to add an element to the match, remove an element from the match or modify an existing element.



4. Click on **Add** to beginning defining the new key. First, select the field to be used. The following screen appears.



The "Define Key Segment" dialog box is shown. It has a title bar with a close button (X). The "Field:" label is followed by the text "First". The "Record:" label is followed by a text box containing "1". There are "OK", "Cancel", "Next", and "Previous" buttons on the right. The "Field Data:" label is followed by a text box containing "Vern". Below this, there are two radio buttons: "Use Partial Field" (unselected) and "Use Entire Field" (selected). To the left of the "Use Partial Field" radio button are "Start:" and "Count:" labels, each followed by a text box with a spinner. The "Start:" text box contains "0" and the "Count:" text box contains "1". To the right of the "Use Entire Field" radio button is a "Max Size:" label followed by a text box containing "32". At the bottom left, there is a checkbox labeled "Reverse Order" which is unchecked.

Choose to use the entire field data by clicking on **Use Entire Field** or click on **Use Partial Field**. If you click on **Use Partial Field**, you need to define where in the field to start the match and then define the length of the field to use. This key is using the field "Address" and starting at the first character position and using a total of 5 characters. The button labeled Next allows you to scroll through your data to determine if the Start and Count values are correctly defined. Click **OK** to accept the definition. Repeat for as many fields as you want to use in the duplicate key. When done defining the key, click on **OK** and then click on the **Test** button to see if the results are what you expect.

Database addresses are in:

- ☒ United States
- ☐ Canada

This section allows you to select whether your list consists of addresses from the United States or Canada.

## DUPLICATE PROCESSING

Under Duplicate Processing, you can:

- Select to back up your data before processing
- Select the primary record (the retained record) as being the first record found or the last record found or the earliest time stamp or the most recent time stamp
- Maintain a log file of the Duplicate Management task
- Retain duplicates after deletion

Once the parameters are set, click the **Run** key to find the duplicates. If you have any duplicates, you will be able to view the set of duplicate records. You can print a Duplicate Summary report by clicking on **Print**.

Click the button **Display Sets** to view your duplicates. The following screen will appear:

Record	Set	first	last	company	address	city	st	zip	phone	Crrt	Delpt	Subscr
003826	0001	Angela	Johnson		1658 E COUNTY ROAD 54	BLYTHEVILLE	AR	72315-8434		R003	580	
003827	0001	Angela	Johnson		1658 E COUNTY ROAD 54	BLYTHEVILLE	AR	72315-8434		R003	580	
003951	0002	Angela	Johnson		222 VALLEY VIEW DR	NORTH LITTLE ROCK	AR	72118-5160		C002	225	
003952	0002	Angela	Johnson		222 VALLEY VIEW DR	NORTH LITTLE ROCK	AR	72118-5160		C002	225	
003377	0003	Thomas	Tanya		24 DEERWOOD DR	MORRILTON	AR	72110-4416		R004	248	
003985	0003	Thomas	Thomas		24 DEERWOOD DR	MORRILTON	AR	72110-4416		R004	248	
004081	0004	Angela	Johnson		1021 SHOBE RD	BRYANT	AR	72022-2447		C016	217	
004082	0004	Angela	Johnson		1021 SHOBE RD	BRYANT	AR	72022-2447		C016	217	
003398	0005	Lowe	Leah		1124 CLIFTON ST	CONWAY	AR	72034-3911		C013	244	
004030	0005	Lowe	Lowe		1124 CLIFTON ST	CONWAY	AR	72034-3911		C013	244	
003103	0006	Mark	Lewis		5711 CALLE REAL	SANTA BARBARA	CA	93117-2315		C025	116	
003104	0006	Marc	Lewis		5711 CALLE REAL	SANTA BARBARA	CA	93117-2315	215 555 7854	C025	116	
003113	0007	Kellan	O'Brien		5800 CATHEDRAL OAKS RD	SANTA BARBARA	CA	93117-1829		C027	009	
003114	0007	Kellan	Obrian		5800 CATHEDRAL OAKS RD	SANTA BARBARA	CA	93117-1829		C027	009	
003109	0008	Alex	Marshall		2912 DE LA VINA ST	SANTA BARBARA	CA	93105-3310		C033	122	
003110	0008	A.	Marshall		2912 DE LA VINA ST	SANTA BARBARA	CA	93105-3310		C033	122	
003095	0009	David	Kramer		15 E CABRILLO BLVD	SANTA BARBARA	CA	93101-2310		C004	154	
003096	0009	David	Cramer		15 E CABRILLO BLVD	SANTA BARBARA	CA	93101-2310	888 227 7221	C004	154	
003100	0010	Bryan	Grindman		1 STATE ST	SANTA BARBARA	CA	93101-3527		C004	018	
003101	0010	Brian	Grindeman		1 STATE ST	SANTA BARBARA	CA	93101-3527		C004	018	
003102	0010	Bryan	Grindeman		1 STATE ST	SANTA BARBARA	CA	93101-3527		C004	018	

Close

Closes this screen

Collapse All

or

Expand All

Lets you collapse or expand the sets of duplicates found

Dupe Level:

Near

This option lets you set the duplicate level. You can select near, high or exact matches.

Mark All	Marks all records for deletion
Unmark All	Unmarks all records for deletion
Toggle All	Reverses marks, makes all records marked, unmarked and all records marked, unmarked
Auto Mark	Automatically marks all duplicates for deletion, based on priority records chosen on the duplicate management window
Record View...	Open the record view of the duplicate detection
Remove Dupes...	Permanently deletes marked records

To view the duplicate records one at a time, click on **Record View** to see each duplicate by itself. This screen will appear:

Field Name	Primary Record	Duplicate
first	Angela	Angela
last	Johnson	Johnson
company		
address	1658 E COUNTY ROAD 54	1658 E COUNTY ROAD 54
city	BLYTHEVILLE	BLYTHEVILLE
st	AR	AR
zip	72315-8434	72315-8434
phone		
Crrt	R003	R003
Delpt	580	580
Subscriber		
Result		
Corrections	ALT	ALT
LOTCode	0254	0254
LOTDIR	D	D
EffectiveDate		
MoveType		
COACode		
CoaFound		
TimeStamp		
Undeliverable		
RDI		
DPV	Y	Y
DPVFootNote	AABB	AABB
QStreet		

Records in Set: 2    Dupett: 1    Set#: 1

Primary to Dupe >>>    <<< Dupe to Primary

Mark/Unmark Primary    Mark/Unmark Dupe    Close

Here you can move information from one duplicate to another and mark or unmark the duplicate for deletion.

**Primary** is the record in the column headed Primary record and is the record that will be retained. Duplicate is the record in the column headed Duplicate. You can move data from primary record to duplicate by clicking on **Primary to Dupe** or from the duplicate record to the primary record by clicking on **Dupe to Primary**. You can also mark or unmark the primary record by clicking on the **Mark/Unmark Primary** button, or, mark or unmark the duplicate record by clicking on the **Mark/Unmark Dupe** button. Click on **Close** when you are done examining the records.

Click on the **Remove Dupes** button to delete the records from the mailing list.

## CARD VIEW DESIGNER

The Card View designer allows you to add data to a form.

**New** allows you to make a new card view form

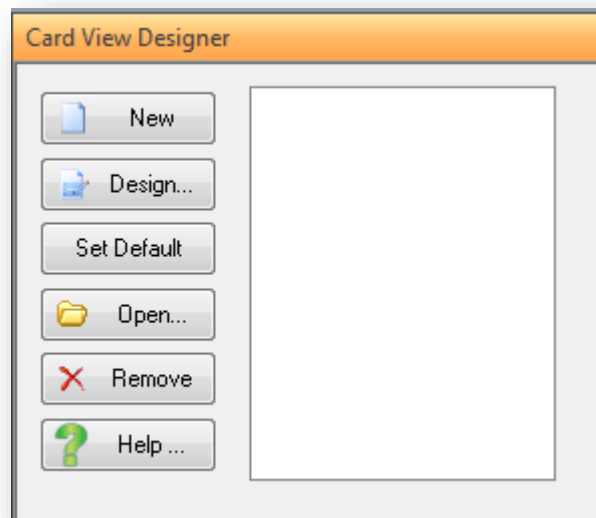
**Design** allows you to add fields to the card view form

**Set Default** sets what form will be the default view

**Open** allows you to browse to a particular form to select it

**Remove** deletes the selected form

**Help** opens the help topic for this task



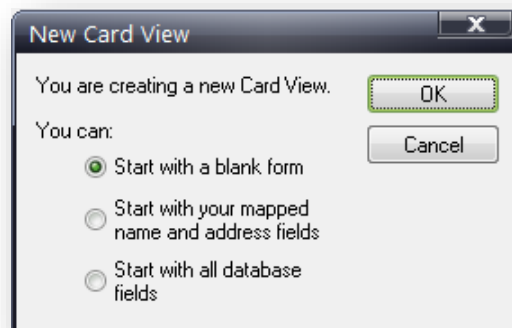
## DESIGNING A NEW FORM

When the **New** button is clicked, the following window appears.

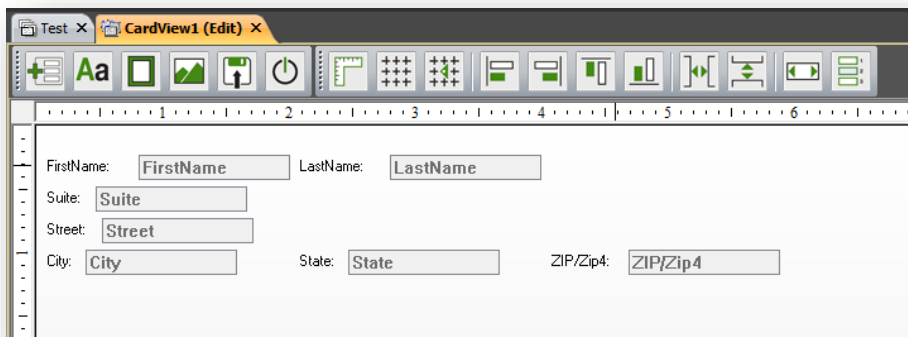
**Start with a blank form** will display a clean form with no fields

**Start with your mapped name and address fields** will make a form with address block fields already in it

**Start with all database fields** will add all of the fields in the list to the form



Once you start to design the Card View, there are several icons that assist you.







**Add Data** – This will show a list of all of the fields in a list. Click and drag the field onto the form and a definition screen displays for Normal Edit, List Select, or Check box to include or not.



**Add Text** – This enables you to add text that will always be the same in every record



**Add a Frame** – This will allow you to type in literal text and enclose it in a box



**Add a Picture** – This will add a graphic (\*.bmp or \*.jpeg file) to the card view



**Save** – Saves the current settings for the card view



**Live Mode** – Toggles between design mode and using the card view



**Toggle Ruler** – Displays or removes the rulers on the card view



**Toggle Grid** – Turns the grid markings off or on



**Toggle Snap-to-Grid** – Turns on or off the snap to grid feature



**Align Left** – Sets the same left starting position for the grouped fields



**Align Right**– Sets the same right ending position for the grouped fields



**Align Top** – Sets the same top of field position for the grouped fields



**Align Bottom** – Sets the same bottom of field position for the grouped fields



**Space Across** – Sets even spacing between fields on the same row



**Space Down** – Sets even vertical spacing between grouped records



**Align Length** – Makes the length of the display field the same for the grouped records



**Assign Order** – This will assign a sequential number to each field that is in the card view. This is a toggle so pressing it will assign the numbers and then pressing again will remove the numbers.

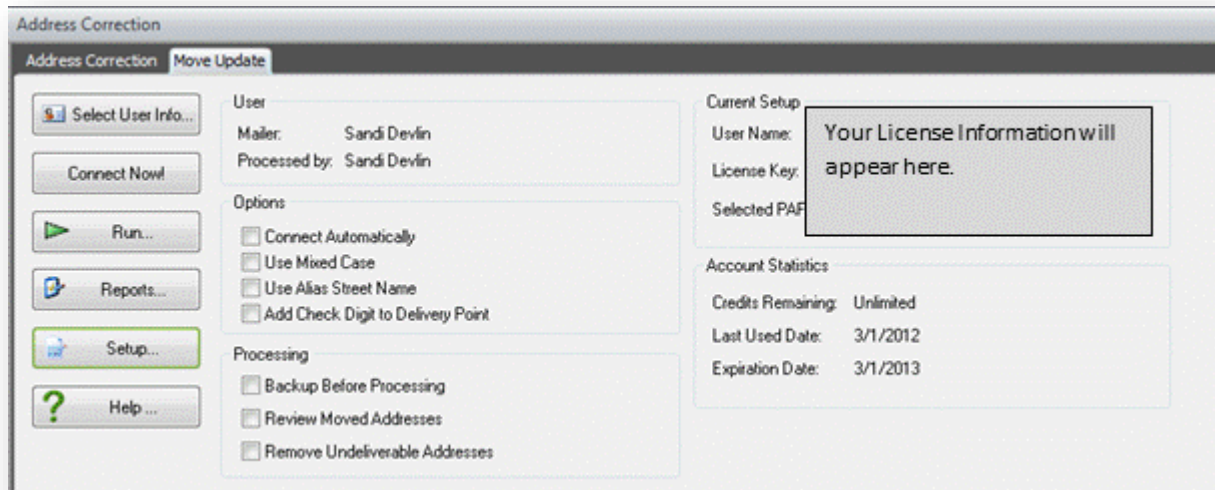
After the completion of the card view, click on **Save** to save your changes. To go back to the spreadsheet view of your data, go to the **Database List** task and click the radio button for **Grid View**.

## ADDITIONAL MODULES



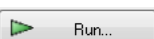



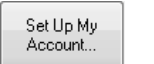
There are additional modules available for AccuMail frameworks.

### ADDRESS CORRECTION WITH MOVE UPDATE

You can perform Address Correction with Move Update on your list if you have purchased the NCOA<sup>Link</sup> Module. This Module will allow you to set up and process your database through our NCOA<sup>Link</sup> server. To NCOA<sup>Link</sup> your list select the **Address Correction** task and select the **Move Update** tab. The following screen will appear:



The Address Correction with Move Update has several options on the screen:

- |   |   |
|---|---|
|  | Allows you to select the Mailer and Preparer to be printed on the CASS 3553 Form  |
|  | Tests the Connection to the NCOA <sup>Link</sup> Server   |
|  | Starts the validation process for the active database. At the end of the process, a statistics screen appears. You can choose to view the CASS Certificate which will allow you to print a PDF of the CASS Certificate. |
|  | Allows you to view the Reports created  |
|  | Opens the Setup window, to allow the setup of AccuMail frameworks for NCOA <sup>Link</sup> processing, including customer Processing Acknowledgement Forms (PAF)  |
|  | Opens the help documentation  |
|  | Opens the <b>Set Up Your Move Account</b> screen – This is only shown when you do not have NCOA <sup>Link</sup> enabled   |

The Options section allows you to set preferences for the processing and reviewing of your data.

**Connect Automatically** – connects to the NCOA ftp site

**Use Mixed case** – converts data to mixed case for CASS certified addresses (gets a plus-four assigned)

**Use Alias street names** – use alias street names rather than the base street name preferred by the USPS

**Add Check Digit to Delivery Point** – combines the address check digit for mailing into the field you have mapped to **Delpt** (Delivery Point).

The processing section has the following options:

**Back up before processing** – makes a backup of your data before the processing

**Review Moved Addresses** – lets you see what addresses were changed during the NCOA process

**Remove Undeliverable Addresses** – Will delete addresses that were not assigned plus-fours

The **Current Setup** shows the current User Name and License Key of the Web Service Setup. It also show the Processing Acknowledgement Form used.

The **Account Statistics** section show the Credits left and the Date the service was last used as well as the Expiration Date of the Add-On Module. For more information about AccuMail frameworks Web Services see the section: **Address Correction using NCOA<sup>Link</sup>**.

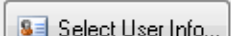
The screenshot shows a window with two sections. The top section, titled 'Current Setup', contains labels for 'User Name:', 'License Key:', and 'Selected PAF:', followed by a large rectangular box containing the text 'Your License Information will appear here.' The bottom section, titled 'Account Statistics', contains three rows of data: 'Credits Remaining: Unlimited', 'Last Used Date: 3/1/2012', and 'Expiration Date: 3/1/2013'.

Current Setup	
User Name:	Your License Information will appear here.
License Key:	
Selected PAF:	

Account Statistics	
Credits Remaining:	Unlimited
Last Used Date:	3/1/2012
Expiration Date:	3/1/2013

## ADDRESS CORRECTION USER INFO

When you click on the  button, the following screen will appear:

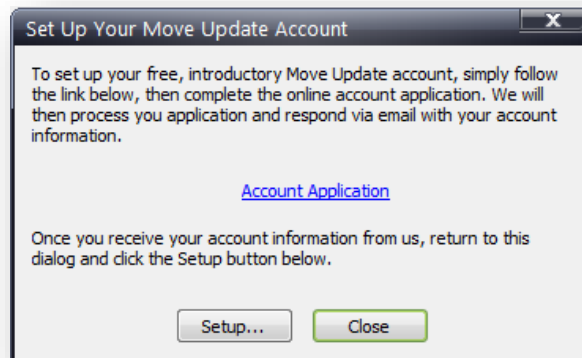
The screenshot shows a dialog box titled 'CASS User Info'. It has two dropdown menus. The first is labeled 'Mailer:' and has 'Sandi Devlin' selected. The second is labeled 'Processed by:' and also has 'Sandi Devlin' selected. Both dropdowns have a small '...' button to their right. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

You will be able to click on the down arrow to select the Mailer and Preparer. For more information on adding Mailer information, see the [System User Info](#).

To setup AccuMail frameworks for NCOA<sup>Link</sup> for the first time you will need to click on the following screen will appear:

Set Up My Account...

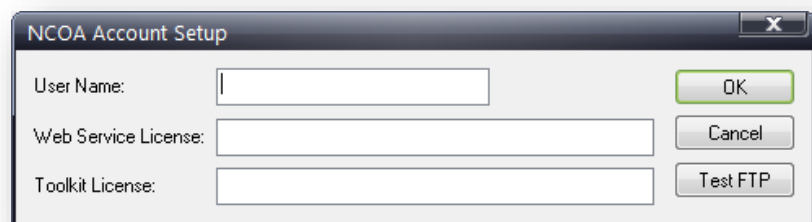
The



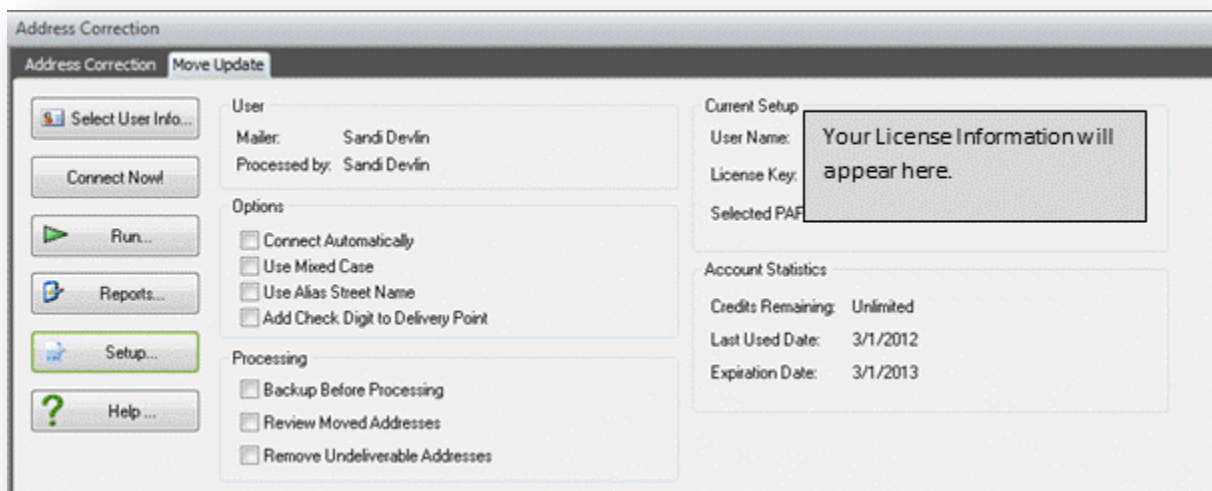
If you have not received your License Information click **Account Application**, this will take you to our website to fill out a request form. Once we receive your request we will send you an email with your License Information.

If you have received your License Information click the **Setup** Button. The following screen will appear:

Enter your User Name and license keys here. When complete click **OK**.

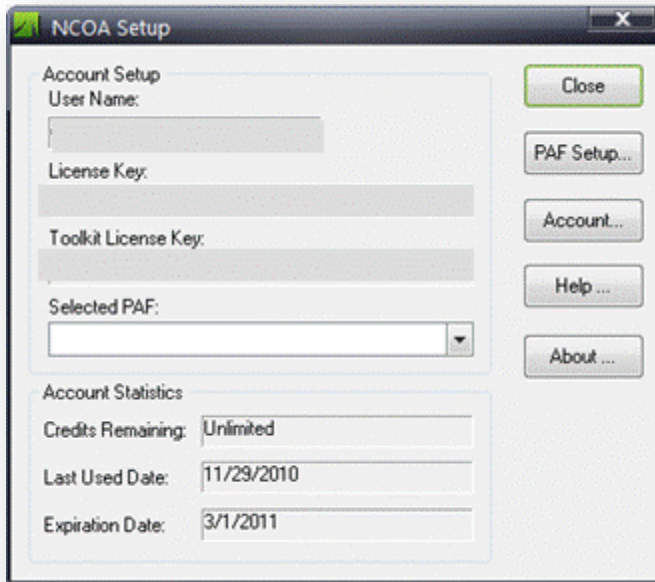


You will be taken back to the task information. Your screen will now look like this:



The next thing you need to do will be to create your Processing Acknowledgement Form (PAF). To do this you will need to do the following:

1. Click the **Setup** button. The **NCOA Setup** screen will appear:

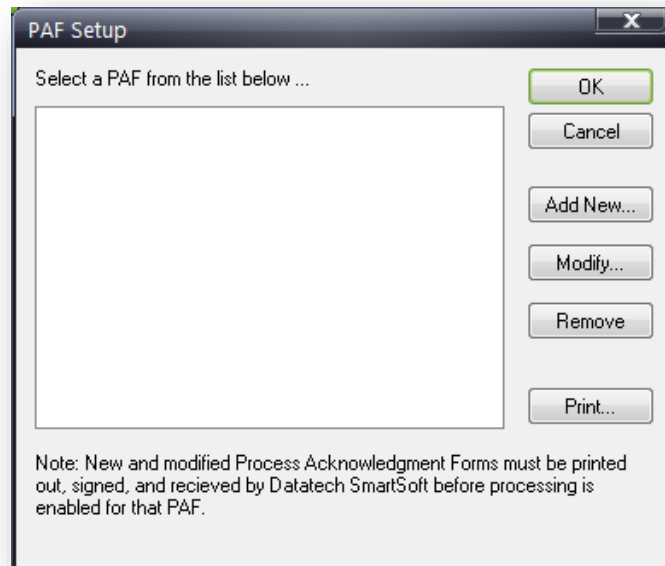


The NCOA Setup dialog box contains the following fields and buttons:

- Account Setup**
  - User Name: [text box]
  - License Key: [text box]
  - Toolkit License Key: [text box]
  - Selected PAF: [dropdown menu]
- Account Statistics**
  - Credits Remaining: Unlimited
  - Last Used Date: 11/29/2010
  - Expiration Date: 3/1/2011
- Buttons:** Close, PAF Setup..., Account..., Help..., About ...

2. Click on **PAF Setup...**

3. Click on **Add New...** to begin the PAF Assistant.



The PAF Setup dialog box contains the following elements:

- Title:** PAF Setup
- Text:** Select a PAF from the list below ...
- List Area:** A large empty rectangular box for displaying a list of PAFs.
- Buttons:** OK, Cancel, Add New..., Modify..., Remove, Print...
- Note:** New and modified Process Acknowledgment Forms must be printed out, signed, and recieved by Datatech SmartSoft before processing is enabled for that PAF.

The NCOA Processing Acknowledgement Form Assistant will display.

1. This assistant will walk you through creating your PAF. Each screen has an instruction window. This window will tell you information about the section of the PAF you are filling out.

The screenshot shows a software window titled "NCOA Processing Acknowledgment Form Wizard" with a sub-header "List Owner". It contains several input fields for company and contact information. A legend at the bottom explains the role of the List Owner.

**\*required field**

Company Name\*

Address\*

City\* State\* ZIP+4\*

Telephone Number\* Email Address

Parent Company Name

Marketing or "DBA" Company Name or Primary Affiliate Company Name

Name\* Title

Enter information pertaining to the List Owner\*

\*The List Owner is:

- The Person/Company for whom processing will be done
- Usually the owner of the mail created from this list
- The beneficiary of the NCOA Link processing

< Back Next > Cancel Help

2. Once you are finished with the assistant you will be asked to Electronically sign your PAF, the following screen will appear:

On this screen you will choose to **Sign Now** as the List Owner or to **Print Interim Copy** to send to the List Owner to sign the PAF. If you select to print the PAF, it will open in an Adobe PDF viewer.

Once you are ready to sign the PAF select **Sign Now**.

The screenshot shows a software window titled "Complete PAF". It provides instructions on how to sign or print the PAF and includes three buttons: "Sign Now", "Print Interim Copy", and "Cancel".

Almost done...

Before your PAF is complete, it must be signed by the responsible parties. If you are the list owner, you may sign the PAF digitally now and it will be saved and ready for use.

To sign the PAF now as the List Owner, click Sign Now.

If you are the Broker or List Administrator, you must have a copy of this PAF, signed by the List Owner, in your possession before digitally signing and saving the PAF.

To print out an interim copy of the PAF, needed for the list owner's signature, click

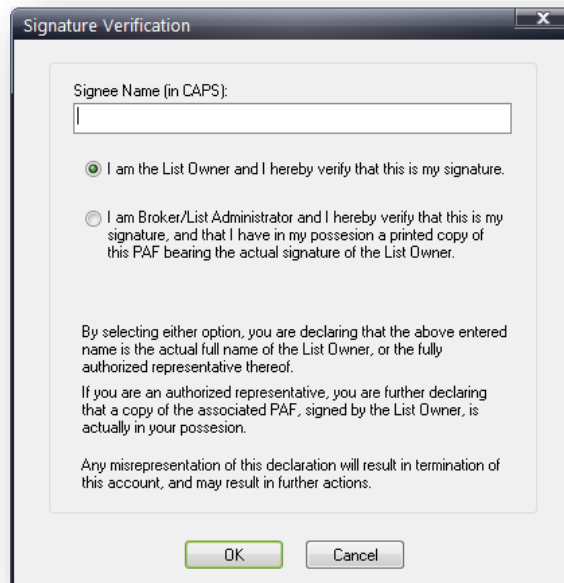
When you (Broker or List Administrator) have obtained the signature of the List Owner, use the Modify button on the PAF Setup dialog to bring up the PAF Wizard, proceed to the last page, click Finish, and then select Sign Now from this dialog.

Sign Now

Print Interim Copy


Cancel

3. The **Signature Verification** window will open. Simply follow the direction on the screen to sign and enable your PAF.

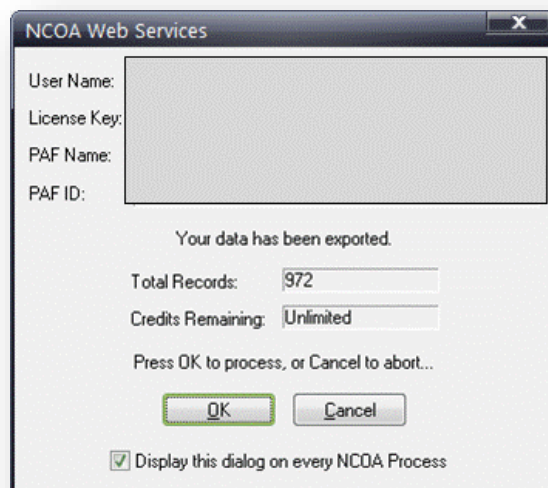


4. If you need to make any changes or print your PAF you can always come back to the PAF Setup and Modify or Print your form again your PAF will open in Adobe.

## ADDRESS CORRECTION WITH MOVE UPDATE RESULTS

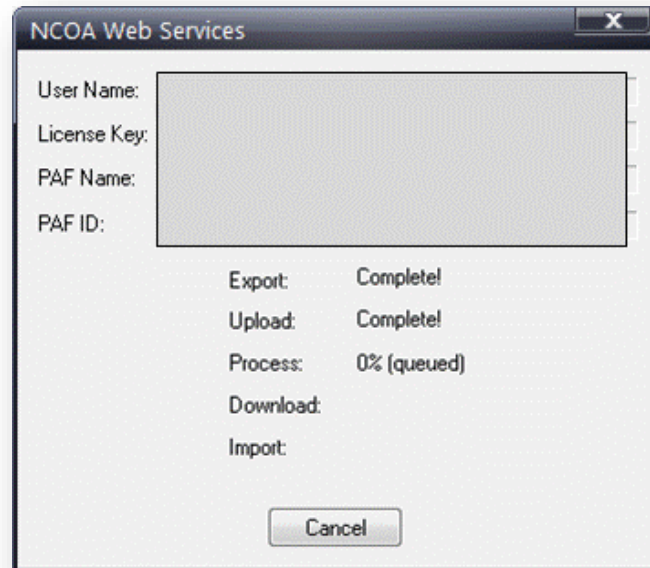
Once you are setup to process your database through NCOA<sup>Link</sup>, click on the  button.

The following screen will appear:

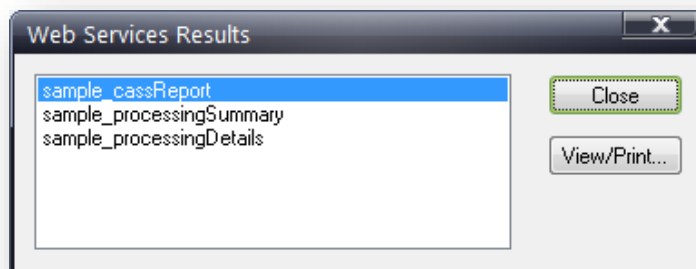



This window shows you the number of records that will be processed and how many credits you have available. If you have purchased and unlimited tier it will read "Unlimited" in the credit remaining field. Once you are ready to process your list click **OK**.

The next window that appears shows your progress on the NCOA server:



Once your list is processed you will be able to view and print the reports showing you your results:



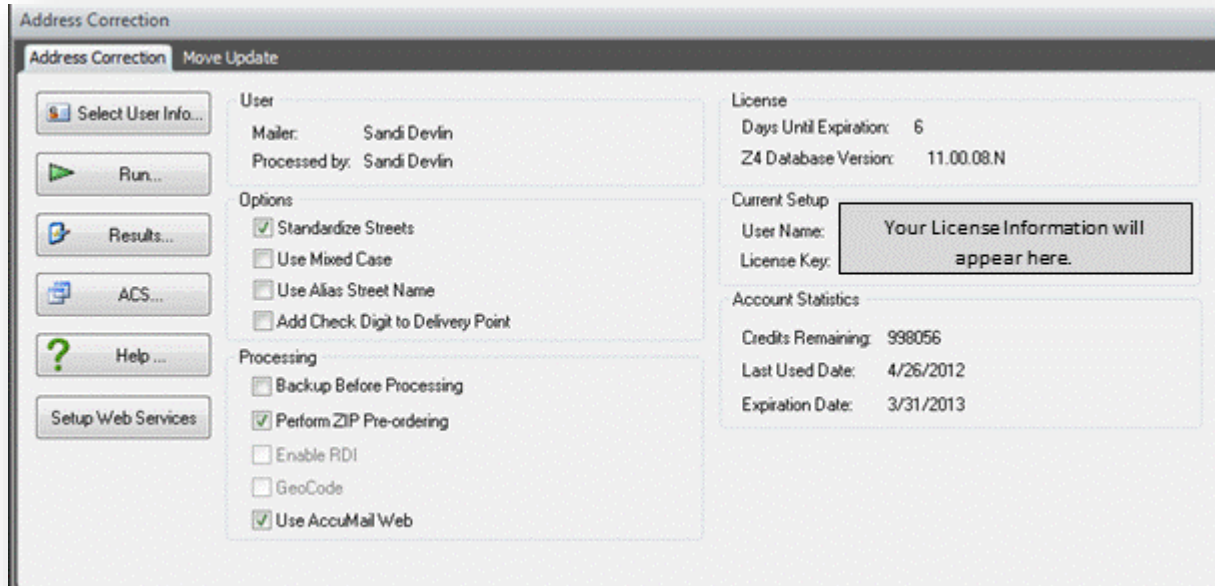
These reports are also available when you click  on button.

Once your list is processed, you can then use our filter option to view the results of the Address Changes. See the section on **Filter** for more help.



## ADDRESS CORRECTION USING WEB SERVICES

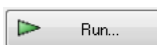
You can perform Address Correction via Web Services on your list if you have purchased the Web Service Module. This Module will allow you to set up and process your database through our Web Service server. When you first click on the **Address Correction**, and have the Address Correction tab selected you will see the following screen:



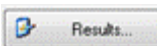
The Address Correction screen has several buttons that are used during the address correction process. The buttons are defined below.



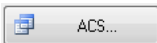
Allows you to select the Mailer and Preparer to be printed on the CASS 3553 Form



Starts the validation process for the active database. At the end of the process, a statistics screen appears. You can choose to view the CASS Certificate which will allow you to print a PDF of the CASS Certificate.



Allows you to view the Results of your Address Correction



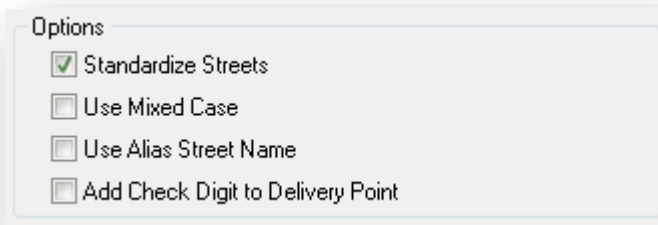
Allows you to import your Address Change Service (ACS) file from the United States Postal Service into your database



Opens the help documentation



Opens the AccuMail frameworks Web Services Setup screen



The options available in the Address Correction window are separated into categories:

Click on the **Standardize Streets** check box to standardize street addresses. AccuMail frameworks corrects the prefixes, suffixes, directionals, and other abbreviations to standard US Postal

Service spellings. It also corrects the spelling of the street name itself, but does not change the house or street number.

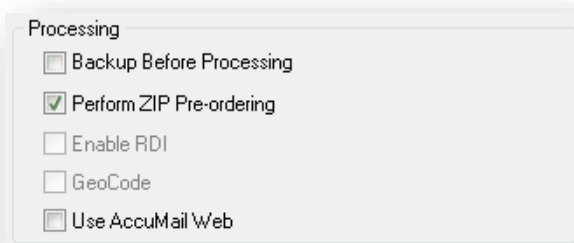
Click on **Use Mixed Case** to select mixed case as the output of your database. If you would rather your list be all Upper Case do not select this option. The address must be assigned a plus-four to be CASS Certified.

Next you can select alias or base street names. An *alias* name is an alternate name for a street. It may be a name by which a street was formerly known, a commonly used nickname for a street, or one the community prefers to use.

The USPS designates one of the street names the "base" street name and calls all other names "alias" street names. For example, in a given ZIP Code, 1st St may be an alias for Martin Luther King Jr Hwy. In this case, the street name has changed. The USPS strongly encourages mailers to use the base street name, Martin Luther King Jr Hwy, because it is the new name. However, the alias 1st St is also allowed.

When you browse through the database, AccuMail frameworks displays both the base and alias street names. However, when you run a task, you need to select which one you want to use.

If you want to retain the alias if it is in the input file when you run a task, click on the **Use Alias Street Name** check box. If you want AccuMail frameworks to always use the base street name preferred by the USPS, leave this option unchecked.



Select **Add Check Digit to Delivery Point** to combine the address check digit for mailing into the field you have mapped to **Delpt** (Delivery Point).

You can also select to create a backup of your database before processing your list.

Also, you can select to **Perform ZIP Pre-Ordering**. This option will allow your list to be put in ZIP Code order prior to processing. This option can increase the speed of your CASS Certifying process.

There is an additional module called RDI available for purchase that will indicate whether an address is a residential or a business address. This may help reduce costs for parcel mailings. We also have an additional module for adding Latitude and Longitude, called **GeoCode**. When you have purchased this option you can enable this option. The option **Use AccuMail Web** becomes selectable when you have purchased the AccuMail frameworks Web Services. This will allow you to use our Web Services Server for CASS Certification as opposed to your local data.

User

Mailer: Sandi Devlin

Processed by: Sandi Devlin

Here you can see the associated Mailer and Processor for this list.

License

Days until expiration: 43

Z4 Database Version: 10.00.19.M

This section shows the days left before the Address correction database on your local drive expires. It also shows the version of the Address Correction database you have installed. It is not used in Web Services.

These sections are only shown when AccuMail frameworks Web Services is enabled. The **Current Setup** shows the current User Name and License Key of the Web Service Setup.

Current Setup

User Name: Your License Information will appear here.

License Key:

Account Statistics

Credits Remaining: 998056

Last Used Date: 4/26/2012

Expiration Date: 3/31/2013

The **Account Statistics** section show the Credits left and the Date the service was last used as well as the Expiration Date of the Add-On Module. For more information about AccuMail frameworks Web Services see the section: **Address Correction using Web Services.**

## ADDRESS CORRECTION USER INFO

When you click on the  button, the following screen will appear:

CASS User Info

Mailer: Sandi Devlin

Processed by: Sandi Devlin

OK Cancel

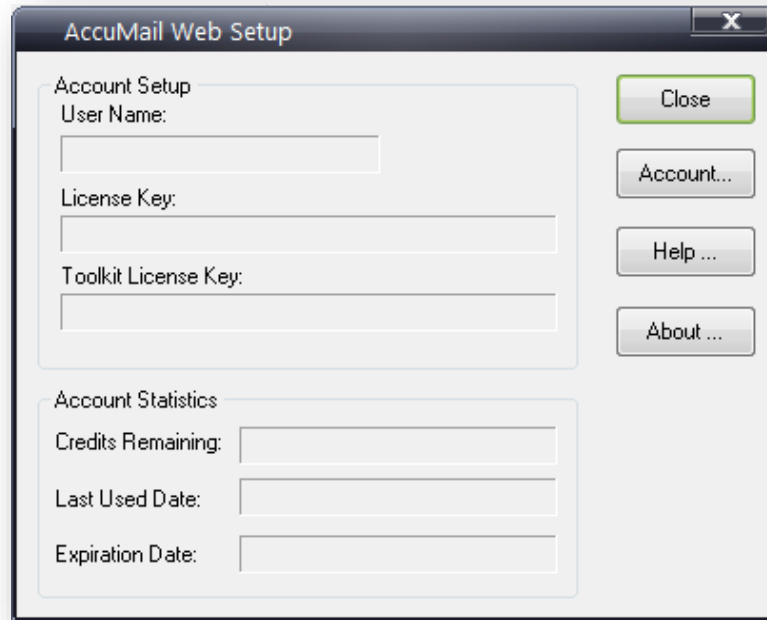
You will be able to click on the down arrow to select the Mailer and Preparer. For more information on adding Mailer information, see the [System User Info](#).

## SETUP ACCUMAIL FRAMEWORKS FOR WEB SERVICES

To setup AccuMail frameworks for Web Services you will need to click on the following screen will appear:

Setup Web Services

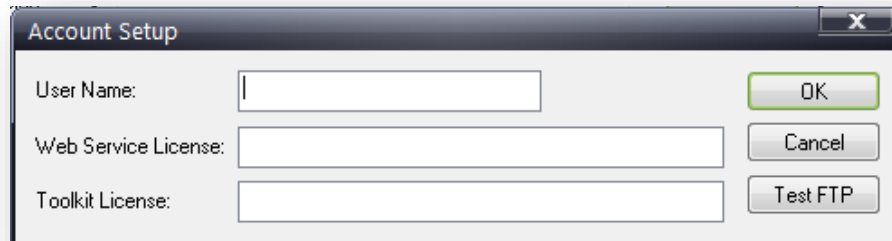
. The



The 'AccuMail Web Setup' dialog box contains two main sections. The 'Account Setup' section has three text input fields for 'User Name:', 'License Key:', and 'Toolkit License Key:'. The 'Account Statistics' section has three text input fields for 'Credits Remaining:', 'Last Used Date:', and 'Expiration Date:'. On the right side, there are four buttons: 'Close' (highlighted with a green border), 'Account...', 'Help ...', and 'About ...'.

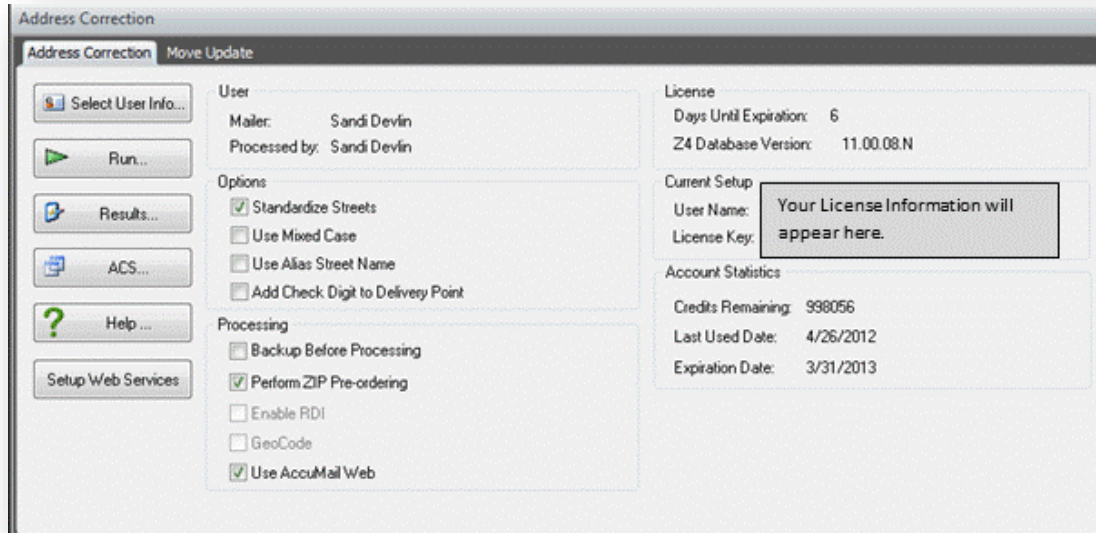
If you have received your License Information click the **Setup** Button. The following screen will appear:

Enter your User Name and license keys here. When complete click **OK**.

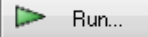


The 'Account Setup' dialog box features three text input fields labeled 'User Name:', 'Web Service License:', and 'Toolkit License:'. To the right of these fields are three buttons: 'OK' (highlighted with a green border), 'Cancel', and 'Test FTP'.

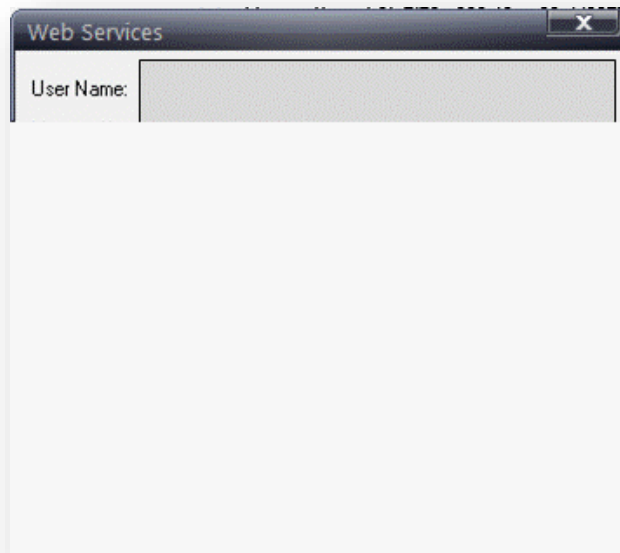
You will be taken back to the task information. Your screen will now look like this:



## ADDRESS CORRECTION VIA WEB SERVICE RESULTS

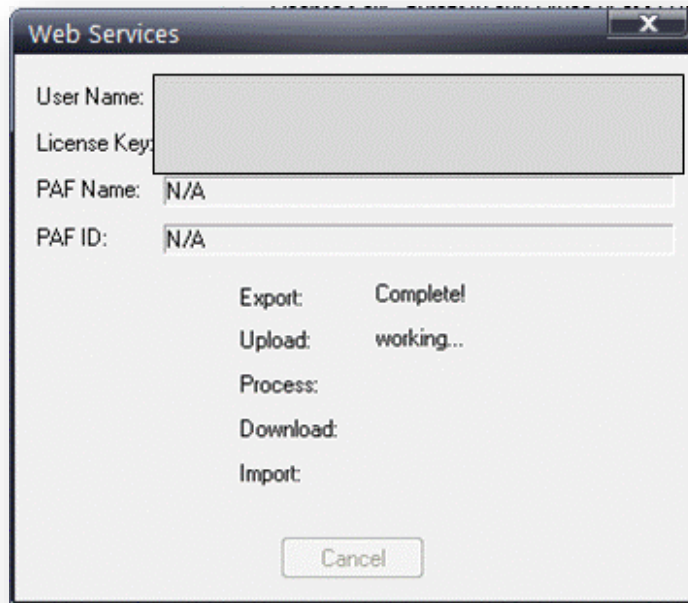
Once you are setup to process your database through NCOA<sup>Link</sup>, click on the  button.

The following screen will appear:

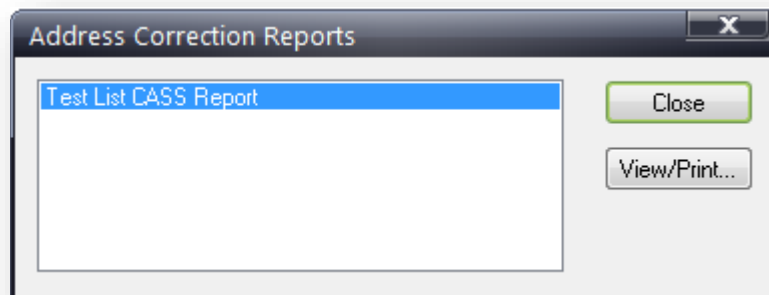



This window shows you the number of records that will be processed and how many credits you have available. If you have purchased an unlimited tier it will read "Unlimited" in the credit remaining field. Once you are ready to process your list click **OK**.

The next window that appears shows your progress on the NCOA server:



Once your list is processed you will be able to view and print the reports showing you your results:



These reports are also available when you click on  Reports... button.

Once your list is processed, you can then use our filter option to view the results of the Address Changes. See the section on **Filter** for more help.

## LATITUDE & LONGITUDE

AccuMail frameworks GeoCode assigns Latitude and Longitude data to your database. The data is assigned based on the ZIP+4 code of the address. This means that searches can be done to find addresses within mere feet of the origin plus-four.

GeoCoding is the process of assigning a location, usually in the form of coordinate values (points), to an address by comparing the descriptive location elements in the address to those present in the reference material. Addresses come in many forms, ranging from the common address format of a house number followed by the street name and succeeding information to other location descriptions, such as postal zone or census tract. An address includes any type of information that distinguishes a place.

GeoCode services provide the ability to assign locations to address attribute information. You can use a GeoCode service to:


- Assign a location to address attributes
- Generate a list of candidate locations for an attribute
- Assign address attributes to a location (reverse geocoding)
- Modify input and output properties associated with the geocode process

## PREPARING YOUR LIST FOR ACCUMAIL FRAMEWORKS GEOCODE

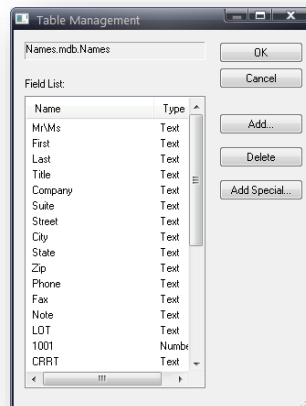
There are a few fields that need to be added to your list in order to get the most from Geocode. These fields are explained in the section **GeoCode Fields**.

To add these fields follow the steps below.

Open AccuMail frameworks and import a new list. The necessary fields for GeoCode will automatically append to the list.

If you have an existing AccuMail frameworks list select the Table Management button  to edit your fields.

The following screen will appear:



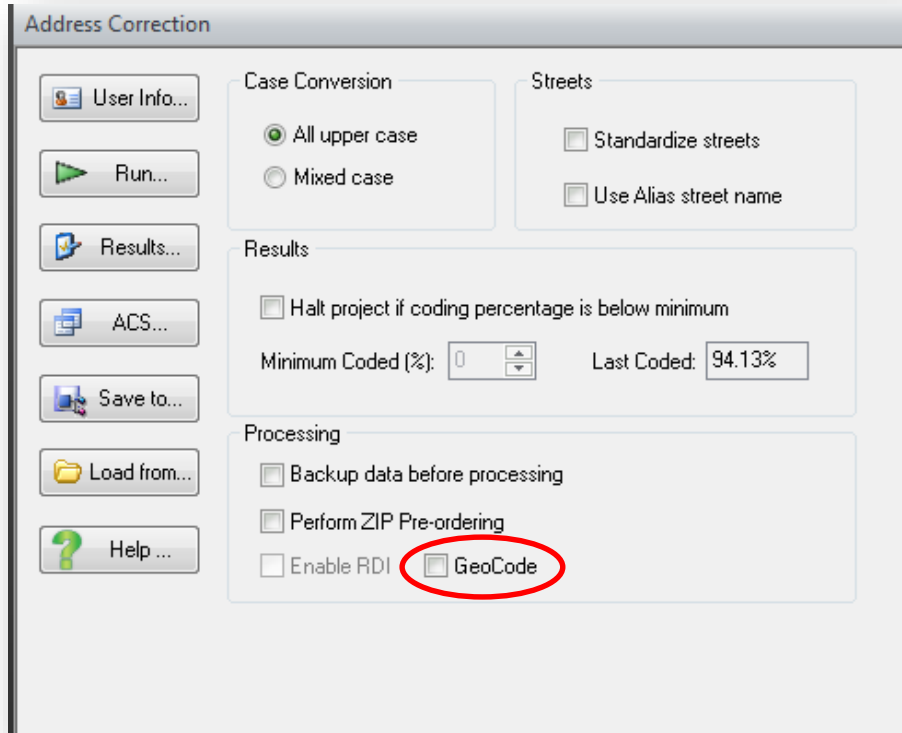
Click on **Add Special**, then choose **GeoCode** and click on **Add Family**.

## ASSIGNING LATITUDE & LONGITUDE TO YOUR DATABASE

Open your AccuMail frameworks list

Click on the **Address Correction** task

The following option will be available:



Simply click on this box and the information will automatically be placed in your list.



The fields that hold the GeoCode data are:

**Latitude**  
**Longitude**  
**CensusTrack**  
**CensusBlock**  
**GeoResult**  
**CensusGroup**  
**CensusSuffix**  
**MetroStatAreaCode**  
**CongrDistrictCode**  
**CountySubdvCode**  
**CombinedStatAreaCode**  
**ElemSchDistCode**  
**StateLegLwrDistrCode**  
**UnifiedSchDistrCode**  
**StateLegUprDistrCode**

**Latitude:** Latitude lines run horizontally

**Longitude:** Longitude lines run vertically.

### **CensusTract:**

Census tracts are small, relatively permanent statistical subdivisions of a county or statistically equivalent entity.

The primary purpose of census tracts is to provide a stable set of geographic units for the presentation of decennial census data.

Census tracts in the United States, Puerto Rico, and the Virgin Islands of the United States generally have between 1,500 and 8,000 people, with an optimum size of 4,000 people.

Census tracts are designed to be relatively homogeneous with respect to population characteristics, economic status, and living conditions.

### **Full Description**

Census tracts are small, relatively permanent statistical subdivisions of a county or statistically equivalent entity delineated by local participants as part of the U.S. Census Bureau's Participant Statistical Areas Program. The U.S. Census Bureau delineated census tracts where no local participant existed or where a local or tribal government declined to participate. The primary purpose of census tracts is to provide a stable set of geographic units for the presentation of decennial census data.

Census tracts in the United States, Puerto Rico, and the Virgin Islands of the United States generally have between 1,500 and 8,000 people, with an optimum size of 4,000 people. For American Samoa, the Northern Mariana Islands, and Guam, the optimum size is 2,500 people. Counties and statistically equivalent entities with fewer than 1,500 people have a single census tract. Census tracts on American Indian reservations, off-reservation trust lands, and special places must contain a minimum of 1,000 people. (Special places include correctional institutions, military installations, college campuses, workers' dormitories, hospitals, nursing homes, and group homes.) When first delineated, census tracts are designed to be relatively homogeneous

with respect to population characteristics, economic status, and living conditions. The spatial size of census tracts varies widely depending on the density of settlement. Census tract boundaries are delineated with the intention of being maintained over many decades so that statistical comparisons can be made from decennial census to decennial census. However, physical changes in street patterns caused by highway construction, new developments, and so forth, may require occasional boundary revisions. In addition, census tracts occasionally are split due to population growth or combined as a result of substantial population decline.

Census tracts are identified by a four-digit basic number and may have a two-digit numeric suffix; for example, 6059.02. The decimal point separating the four-digit basic tract number from the two-digit suffix is shown in the printed reports and on census maps. In computer-readable files, the decimal point is implied. Many census tracts do not have a suffix; in such cases, the suffix field is either left blank or is zero-filled. Leading zeros in a census tract number (for example, 002502) are shown only in computer-readable files. Census tract suffixes may range from .01 to .98. For the 1990 census, the .99 suffix was reserved for census tracts/block numbering areas (BNAs) that contained only crews-of-vessels population; for Census 2000, the crews-of-vessels population is included with the related census tract.

Census tract numbers range from 1 to 9999 and are unique within a county or statistically equivalent entity. The U.S. Census Bureau reserves the basic census tract numbers 9400 to 9499 for census tracts delineated within or to encompass American Indian reservations and off reservation trust lands that exist in multiple states or counties (see **TRIBAL CENSUS TRACTS below**). The number 0000 in computer-readable files identifies a census tract delineated to provide complete coverage of water area in territorial seas and the Great Lakes.

#### **Census Block:**

A **census block** is the smallest geographic unit used by the [United States Census Bureau](#) for tabulation of 100-percent data (data collected from all houses, rather than a sample of houses). Several blocks make up [block groups](#), which again make up [census tracts](#). There are on average about 39 blocks per block group, but there are variations. Blocks typically have a four-digit number where the first number indicates which block group the block is in, for example Block 3019 would be in block group 3. The number of blocks in the [United States](#) including [Puerto Rico](#) is about 8,200,000.

Blocks are typically bounded by streets, roads or creeks. In cities a census block may correspond to a [city block](#), but in rural areas where roads are fewer, blocks may be limited by other features. The population of a census block varies greatly, there are about 2,700,000 blocks with a population of 0, while a block with an [apartment](#) complex may have several hundred inhabitants.

Census blocks covering the entire country were introduced with the [1990 census](#). Prior to this, back to the [1940 census](#), only select areas were divided into blocks.

**GeoResult:**

This field will be blank unless the address could not be matched in the GeoCode Database, then the following will be the results will be applicable:

Invalid Argument = -1  
Address Not Found = -2  
State or County Not Found = -3  
Street Not Found = -4  
Street Range Not Found = -5  
Inexact = 1  
Address Not Checked = 2

**CensusGroup:**

This field represents the Census Block Group.

**CensusSuffix:**

This field represents the one letter Census Block Suffix.

**MetroStatAreaCode:**

This field represents the Metropolitan Statistical Area FIPS code.

**CongrDistrictCode:**

This field represents the Congressional District FIPS code.

**CountySubdvCode:**

This field represents the County Subdivision FIPS code.

**CombinedStatAreaCode:**

This field represents the Combined Statistical Area FIPS code.

**ElemSchDistCode:**

This field represents the Census Elementary School District FIPS code.

**StateLegLwrDistrCode:**

This field represents the State Legislative District Lower Chamber FIPS code.

**UnifiedSchDistrCode:**

This field represents the Unified School District FIPS code.

**StateLegUprrDistrCode:**

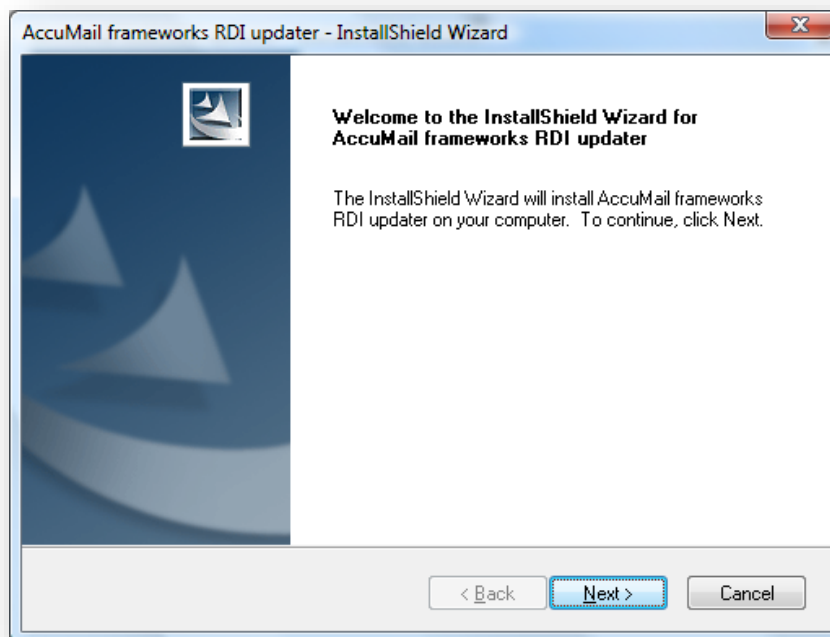
This field represents the State Legislative District Lower Chamber FIPS code.

### RDI™ INSTALLATION INSTRUCTIONS

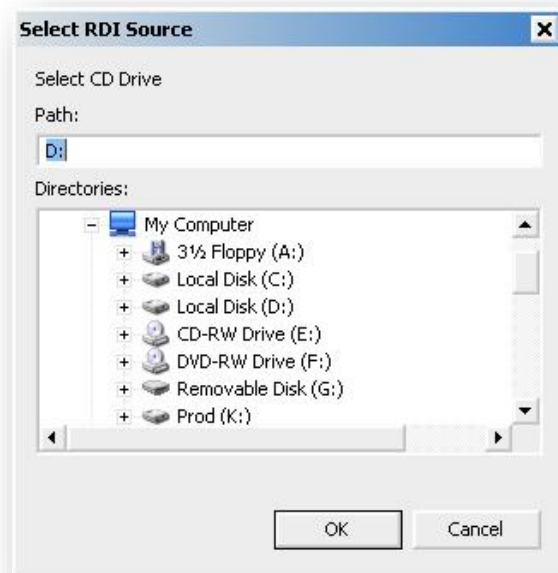
---

There are two steps to installing Residential Delivery Indicator on your computer:

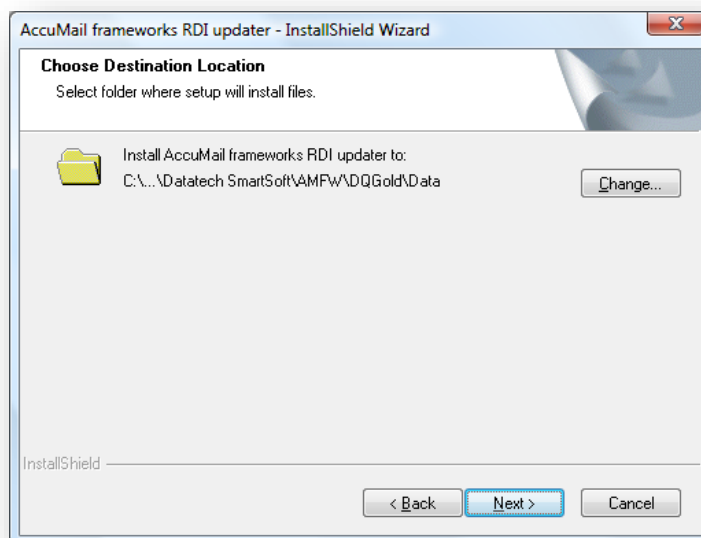
1. Installing the AccuMail frameworks RDI updater (Provided by Datatech Smartsoft)
  - a. Either insert the CD labeled AccuMail frameworks RDI Disk into your CD-ROM drive or download the file with the link provided to you via email.
  - b. If the Auto Run feature is not enabled on your CD, go to **Start | Run** and type **D:\Setup.exe** (Where D: is your CD-ROM drive) and click **OK**, or open the file you downloaded.
  - c. Follow the on screen instructions for installing the RDI updater
2. Installing the RDI data (Provided by the United States Post Office®)
  - a. Place the CD you received from the United States Post Office in your CD-ROM drive
  - b. Click on the **Start** Menu icon labeled Launch RDI updater located in **Programs | Datatech Smartsoft | AccuMail frameworks |**
  - c. The following screen will appear, click **Next** to continue the installation of the data:



- d. On this screen you will select the drive letter of your CD-ROM drive in which you placed the RDI™ data then click **OK**:



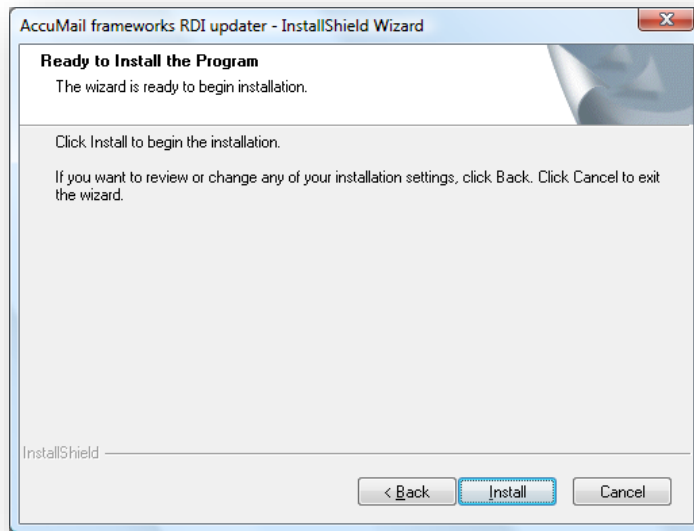
- e. You will now be asked to select the path of your current AccuMail frameworks software, after you verify that the correct path is selected click **Next**



- f. Click **Install** to install the RDI Data.

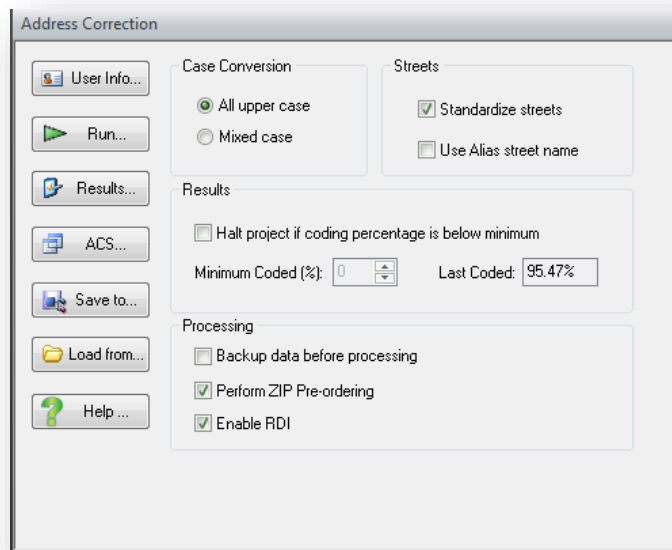
- g. Click **Finish**

You are now ready to process your mailing list through AccuMail frameworks and incorporate RDI.



## USAGE INSTRUCTIONS

The RDI™ module for AccuMail frameworks is easy to use. Once installed, an “Enable RDI” checkbox will appear in the AccuMail frameworks Address Correction screen. This option will allow you to turn RDI processing on or off.



If you have RDI installed, you can turn this option on to have AccuMail frameworks start using the RDI data to validate the physical delivery point of processed addresses. You will notice a field labeled “RDI” at the end of the Grid View list. This field is used to give you information on Residential Delivery. The field format and description is as follows:

**RDI:** This field is used to tell if the address is a Residential Address or not. If it is a Residential Address there will be a “Y” in the field, if it is a Commercial there will be a “N” in the field. If the address is not listed in the Residential Delivery data it will be blank.

## ACCUMAIL FRAMEWORKS COMMAND LINE

The frameworks Command Line Interface is comprised of two parts in the frameworks main program and a separate utility program (fwcmd.exe). With these you may run a sequence of operations on your data file with no user intervention and no windows or dialogs displayed. This is commonly referred to as running "batch jobs".

Running command line or batch jobs with frameworks consists of three simple steps:

1. Save your Job Script(s)
2. Create and save your Command Line Action Script
3. Use FWCMD to execute your batch job

### JOB SCRIPTS

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Job Scripts are files containing all the setup parameters needed to run one of six different kinds of frameworks tasks; Import, US Address Correction, US Address Correction with Move Update, US Postal Presorting, Canadian Address Correction, and Canadian Postal Presorting.

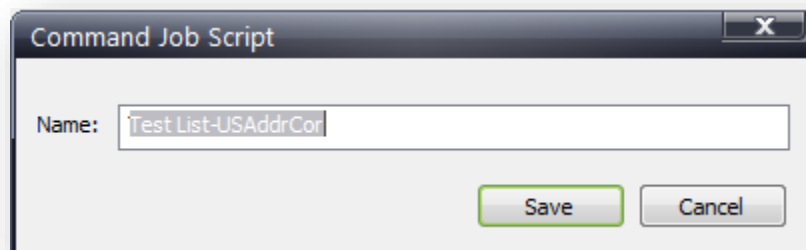
**Note:** You must have purchased the frameworks modules necessary for any task you want to include in your batch job. Note also that a batch job will perform either US or Canadian Address Correction and Postal Presorting. You cannot mix the two in one batch job. This means you can only perform a maximum of four tasks in one batch job (Import, US Address Correction, US Address Correction with Move Update, and US Postal Presorting)

---

### SETTING UP AND SAVING A JOB SCRIPT

To set up a Job Script you must first make sure you have a data file loaded which contains the mapped fields necessary for the kind of job you will be running. For example if you are setting up a US Postal Presort job you will need to have a Zip Code field, a Delivery Point field, City field, State field, etc. and have them correctly mapped using the frameworks Map Fields dialog.

Then, set up your job using frameworks as usual. It is a good idea to run the job normally the first time in order to make sure your setup is performing according to your expectation. When you are satisfied with the setup, select **Tools | Save Job Script . . .** and the following screen will appear:



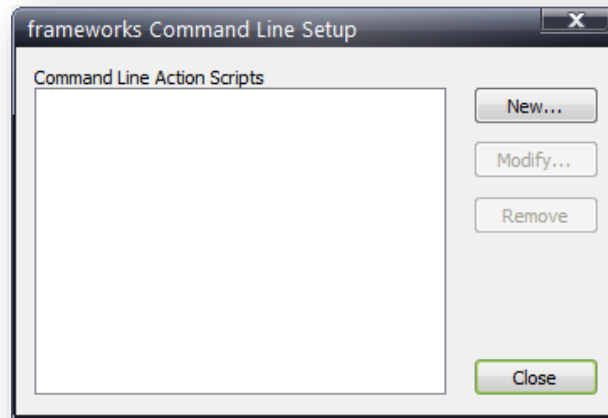
Here you can accept the suggested Job Script name or give it your own, and then press **Save**.

Do this for each task you want to perform in your batch job.

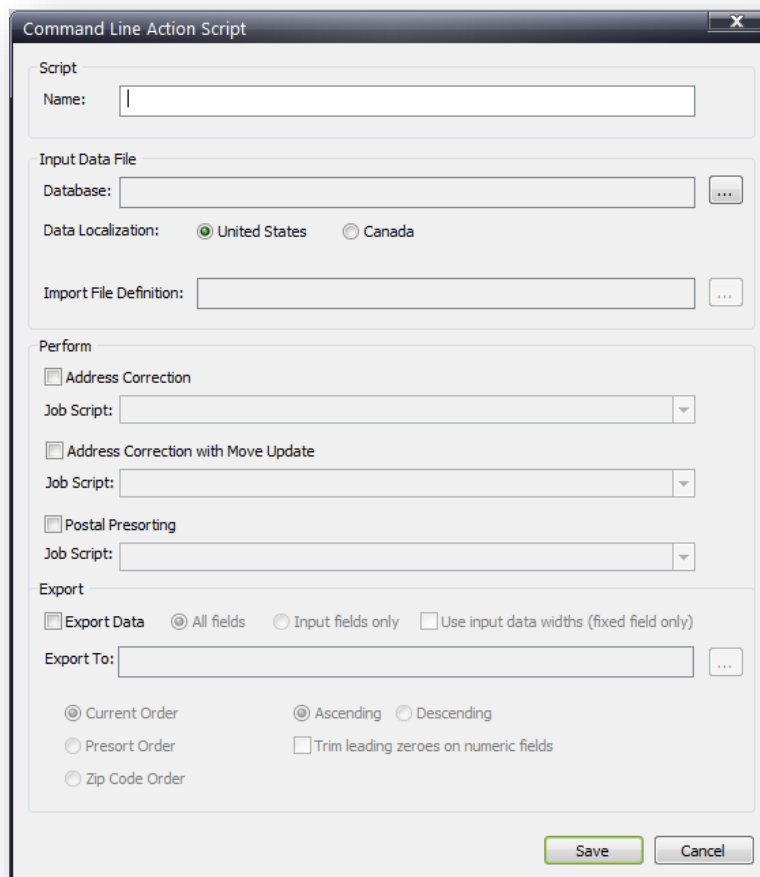
## COMMAND LINE ACTION SCRIPTS

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Once you have set up and saved your Job Scripts, the next step is to set up your Command Line Action Script. Go to **Tools | Command Line Setup** to bring up the Command Line Setup Dialog.



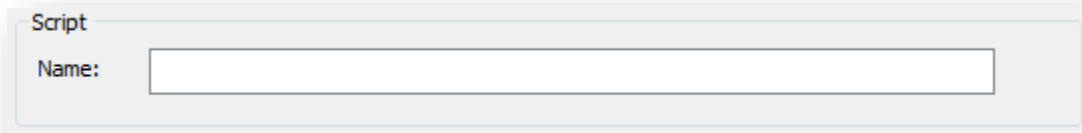
Select **New...** to create a new Command Line Action Script. The following screen will appear:



In this screen you will be naming your job script, selecting the input file, and selecting the tasks to perform.

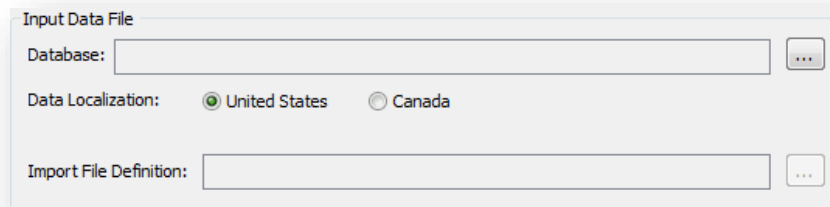


Here you will name your Job Script. This will be the name of the script you run during the final step.



A dialog box titled "Script" with a label "Name:" and an empty text input field.

Here you will select your Input Data File. Setting up for a batch import task is a little different. Currently, frameworks Command Line only accepts comma-delimited text files, fixed length text files or FWDB (frameworks data files) for batch import. Each file must have field mapping information available for the frameworks Command Line processing. A separate file must be supplied with the field name structure on the first (and only) line in the file.



A dialog box titled "Input Data File" with three sections: "Database:" with a text input field and a browse button (...); "Data Localization:" with two radio buttons, "United States" (selected) and "Canada"; and "Import File Definition:" with a text input field and a browse button (...).

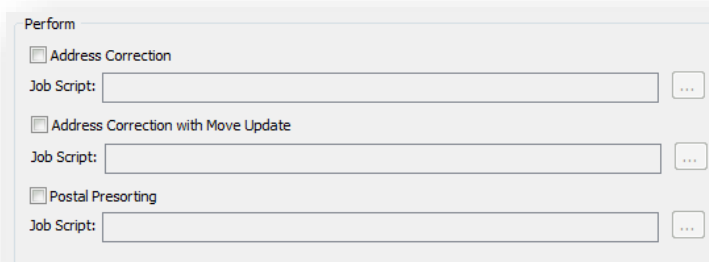
You can create this file by selecting the Export field header only option in frameworks **Export**. Once you do one successful Import of your data file format, and are satisfied with your field mappings, you can simply export your field header to a file and use that file for subsequent batch import tasks.

Set the Data Localization to either United States or Canada. Here you can also select Field Mapping options. If you have an external field map file, select it now.

If the data file you select is a frameworks FWDB database, it will be used as is and from the folder where it was selected. If it is another type of file, frameworks will assume it is comma delimited text format, and attempt to import it when you run this batch job.

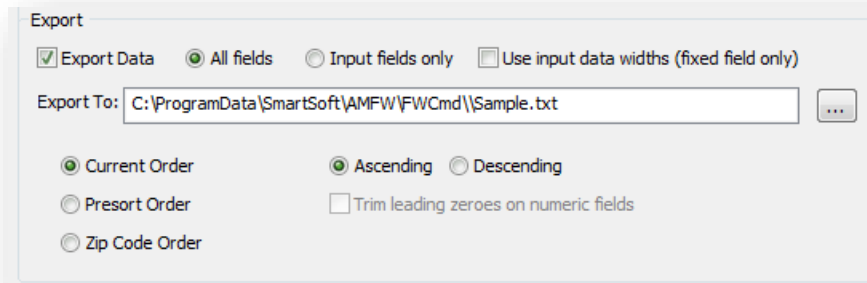
If all you want to do is import a data file into frameworks format, then you are finished with this script and you may click **Save**.

If you want to perform additional batch processing on your data, then select the options desired in the Perform section. For each task type you choose, select the previously saved Job Script.



A dialog box titled "Perform" with three sections, each with a checkbox and a "Job Script:" label with a text input field and a browse button (...):  
1. ☐ Address Correction  
2. ☐ Address Correction with Move Update  
3. ☐ Postal Presorting

The final section is for exporting your data. You can export **All fields** or **Input fields only**. If your list was originally a fixed width file you can choose to **Use input data widths (fixed field only)**.



You can also select the name of the exported file. Lastly you can select the order of the exported file, whether it is **Current Order**, **Presort Order**, or **Zip Code Order**. When Presort Order is selected you can choose to **Trim leading zeroes on numeric fields**.

When you are finished, click **Save**.

## RUNNING YOUR BATCH JOB USING FWCMD

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To run your batch job, first open a command prompt window and navigate to the folder where frameworks is installed.

Enter **fwcmd <Command Script>** where Command Script is the name you gave your Command Line Action Script in the previous step. The frameworks command line processor will execute the tasks that were set up and display any status or error messages in the command prompt window.

**Note:** Script files are stored in a special folder maintained by frameworks, (usually [Program Data]\Smartsoft\AMFW\fwcmd). Output files for each of your tasks (like reports, etc.) will be copied to a sub-folder of the script folder with the same name as your job script (i.e. [Program Data]\Smartsoft\AMFW\fwcmd\MyScript).

## APPENDIX

### RESULT CODES

These are codes that explain why your address could not be certified. These codes will be in the in the field “Result”:

Code	Description
blank	The address has been successfully coded.
1	The address is coded but undeliverable (i.e. on side of street known to contain no houses).
2	The ZIP Code was not found and the city and state cannot be used to determine a geographical area to search.
3	Coding would result in changing both ZIP and city. This is illegal for PO BOX and route type addresses.
4	The best match would result in too many suspicious changes.
5	The street was identified as an alias but was out of the range restricted for that alias.
6	No street address was given.
7	There are no street name matches in the given ZIP Code or in any geographically-related ZIP Code.
8	The street may contain superfluous components which cannot be discarded with confidence
9	The house number could not be matched.
10	The best match was made to a ZIPMOVE record but was not an exact match.
11	A ZIPMOVE match was made but no exact match could be found in the new ZIP.
12	The Early Warning System indicates that an exact match will become available in the next database update.
13	There are multiple matches with the same degree of confidence. This may indicate an inconsistency in the USPS data.
14	Incorrect suffix, directional, street name, or unit resulted in multiple matches with the same degree of confidence.
15	Incorrect ZIP, city, or urbanization resulted in multiple matches with the same degree of confidence.
16	A corrected field was too long to fit into the supplied field.
17	Media Error. The database could not be read because of a hardware or system problem.

## RESULT CODE DETAILED DESCRIPTIONS AND EXAMPLES

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- 1      The address is coded but undeliverable (i.e. on side of street known to contain no houses).  
1700 Thomas Ave  
Santa Barbara CA 93101
- 2      The ZIP Code was not found and the city and state cannot be used to determine a geographical area to search.  
123 Main St  
Invalid City Name CA 00000
- 3      Coding would result in changing both ZIP and city. This is illegal for PO BOX and route type addresses.  
PO Box 12345  
Gaviota CA 93117  
  
NOTE: if the input city is invalid or blank, then it is legal to change both city and ZIP for these types.
- 4      The best match would result in too many suspicious changes.  
123 State Ave  
Santa Barbara CA 93102  
  
NOTE: AccuMail frameworks considers some addressing errors as more serious than others. In order to prevent false matches, AccuMail frameworks allows at most one of these serious errors. Here are the errors AccuMail frameworks considers serious:
  - non-blank ZIP was changed
  - an alias match was made which requires changing street to base name
  - non-blank suffix was changed
  - non-blank directional was changed (except for swapping of pre/post)
  - more than 1 error in directionals and suffix
  - missing unit number (i.e. 123 foo st apt)
  - missing SUD (i.e. 123 foo st 1)
  - leftovers that must be discarded (i.e. 123 foo st PO Box 456)
  - primary range errors (i.e. 123-4 foo st -> 1234 foo st)
- 5      The street was identified as an alias but was out of the range restricted for that alias.  
4179 W Church St  
Pine Plains NY 12567  
  
NOTE: The USPS indicates that some aliases apply only to a certain part of the base street. In the above example, the alias is limited to the range 3000-3816.
  - The AccuMail frameworks browse feature does not currently indicate if the alias has a restricted range; and it shows the entire base street - including those ranges which are legal for the alias.
- 6      No street address was given.  
  
This occurs if the input street is blank AND a match cannot be made by swapping the firm or alternate street fields with the street field.
- 7      There are no street name matches in the given ZIP Code or in any geographically-related ZIP Code.  
123 Invalid Street  
Santa Barbara CA 93101
- 8      The street may contain superfluous components which cannot be discarded with confidence.  
123 Anacapa St Unrecognized Extra Stuff  
Santa Barbara CA 93101

- 9        The house number could not be matched.  
         12345 Anacapa St  
         Santa Barbara CA 93101
- 10       The best match was made to a ZIPMOVE record but was not an exact match.  
         2 Middle Ave  
         Cumberland Foreside ME 04110
- 11       A ZIPMOVE match was made but no exact match could be found in the new ZIP.  
         620 River Dell Rd  
         Breezewood PA 15533
- 12       The Early Warning System indicates that an exact match will become available in the next database update.
- 13       There are multiple matches with the same degree of confidence. This may indicate an inconsistency in the USPS data.  
         RR 3 Box 21  
         Alvin TX 77511
- NOTE: this is often caused by overlapping ranges which have different ZIP+4s.
- 14       Incorrect suffix, directional, street name, or unit resulted in multiple matches with the same degree of confidence.  
         123 Islay St  
         Santa Barbara CA 93101  
         NOTE: this result indicates that information on the street line would have broken a tie between two or more matches.
- 15       Incorrect ZIP, city, or urbanization resulted in multiple matches with the same degree of confidence.  
  
         14 Cranch St  
         Quincy Center MA  
         NOTE: this result indicates that information on the last line would have broken a tie between two or more matches.

## CORRECTION CODES

The correction codes are used to describe what was done to the address in the coding process. Each coded record will be assigned a string of one or more characters. The user may assign any size field to hold the correction codes. If the field is too short, then the codes will be truncated without error.

Code	Description
A	Normal street match
B	PO BOX match
C	Route type match
D	'Unique ZIP' match
E	'Small town' match
F	Alias match
G	'Highrise alternate' match
H	Firm match
I	Highrise match
J	Highrise default match
K	Route default match
L	Street name corrected
M	Street suffix corrected
N	Predirectional corrected
O	Postdirectional corrected
P	City corrected
Q	State corrected
R	ZIP corrected
S	Urbanization corrected
T	ZIP+4 corrected
U	House number corrected
V	Unit number corrected
W	Secondary unit designator corrected
X	Firm corrected
Y	Street swapped with firm
Z	Street swapped with alternate
0	Dual address changed to PO BOX
1	Dual address street match
2	Input city is not preferred but is acceptable
3	Street standardized
4	Unit not verified
5	Leftovers found
6	ZIPMOVE match
7	LACSLINK match

## EXPANDED ADDRESS CODING EXAMPLES BY DEFINITION:

---

### **A "Normal street match"**

123 State St  
Santa Barbara CA 93101

### **B "PO BOX match"**

PO Box 123  
Santa Barbara CA 93102

### **C "Route type match"**

RR 1 Box 1  
Goleta CA 93117

### **D "'Unique ZIP' match"**

XYZ  
Goleta CA 93199

NOTE: Some entities are assigned an entire 5-digit ZIP Code. These ZIPs are flagged as 'Unique' in the postal database. If a street match cannot be made but the city/ZIP indicate a 'Unique ZIP' match, then this correction code will be used.

### **E "'Small town' match"**

123 Main St  
Frenchboro ME 04635

NOTE: If the location indicated by the city/ZIP contains a single General Delivery record AND NOTHING ELSE, then any input street may be assigned to the General Delivery ZIP+4. The input street is preserved.

### **F "Alias match"**

1500 State Highway 154  
Santa Barbara CA 93105

### **G "'Highrise alternate' match"**

101 Plaza Del Caribe  
Ponce PR 00731

NOTE: The 'Highrise Alternate' style of addressing uses the unit number as the house number and the highrise name as the street name. The postal database indicates highrises where this style is used and provides a means for determining the correct street and house number.

### **H "Firm match"**

Californian Hotel  
35 State St  
Santa Barbara CA 93101

### **I "Highrise match"**

202 State St Ste A  
Santa Barbara CA 93101

### **J "Highrise default match"**

202 State St  
Santa Barbara CA 93101

### **K "Route default match"**

RR 1  
Goleta CA 93117

**L "Street name corrected"**

123 Anakapa St  
Santa Barbara CA 93101

**M "Street suffix corrected"**

123 Anacapa Ave  
Santa Barbara CA 93101

**N "Predirectional corrected"**

123 W Anacapa St  
Santa Barbara CA 93101

**O "Postdirectional corrected"**

123 Anacapa St West  
Santa Barbara CA 93101

**P "City corrected"**

123 Anacapa St  
Goleta CA 93101

**Q "State corrected"**

123 Anacapa St  
Santa Barbara NY 93101

**R "ZIP corrected"**

123 Anacap St  
Santa Barbara CA

**S "Urbanization corrected"**

A1 Calle 1  
Mayaguez PR 00680

**T "ZIP+4 corrected"**

**U "House number corrected"**

1234-1 Anacapa St  
Santa Barbara CA 93101

**V "Unit number corrected"**

924 Anacap St Ste X2  
Santa Barbara CA 93101

**W "Secondary unit designator corrected"**

924 Anacapa St Apt 2X  
Santa Barbara CA 93101

**X "Firm corrected"**

Snt Barbara Winery  
202 Anacapa St  
Santa Barbara CA 93101

**Y "Street swapped with firm"**

**Z "Street swapped with alternate"**



**0 "Dual address changed to PO BOX"**

123 XYZ St Box 456  
Santa Barbara CA 93102

**1 "Dual address street match"**

123 Anacapa St PO Box 456  
Santa Barbara CA 93101

**2 "Input city is not preferred but is acceptable"**

4800 Calle Real  
Goleta CA 93111

**3 "Street standardized"**

123 Anacapa Street  
Santa Barbara CA 93101

NOTE: this code is a catch all for many types of corrections made to the street field.

**4 "Unit not verified"**

123 Anacapa Street Apt 1  
Santa Barbara CA 93101

**5 "Leftovers found"**

PO Box 123 Extra Stuff Here  
Santa Barbara CA 93102

**6 "ZIPMOVE match"**

2 Garden Drive  
Litchfield NH 03052

**ZIPMove Implementation**

ZIPMove data identifies address records that may have undergone a change in finance number and shows "old side" and "new side" address detail to assist in making a correct address match. AccuMail frameworks now includes the ZIPMove data provided by the United States Post Office when coding addresses.

**7 "LACSLINK match"**

**Locatable Address Conversion Service (LACS) Implementation**

The Locatable Address Conversion System (LACS) provides mailers an automated method of obtaining new addresses in areas in which new 9-1-1 emergency systems have been implemented. This type of address conversion usually involves changing rural-style addresses to city-style addresses, but in some instances, conversions may result in the renaming or renumbering of existing city-style addresses.

## DPV CODES AND FOOTNOTE DEFINITIONS

The DPV field consists of three characters and returns information in the following format:

---

### DPV MATCH INDICATOR

The DPV Match Indicator is the first position in the DPV field:

- |       |  |
|-------|--|
| Blank | Address was not assigned a ZIP+4 by Accumail and therefore no DPV processing was performed.                          |
| Y     | Address was DPV confirmed for both primary and (if present) secondary numbers  |
| D     | Address was DPV confirmed for the primary number only, and Secondary number information was missing.                 |
| S     | Address was DPV confirmed for the primary number only, and Secondary number information was present but unconfirmed. |
| N     | Both Primary and (if present) Secondary number information failed to DPV Confirm.                                    |

---

### DPV CMRA INDICATOR

The DPV CMRA Indicator is the second position in DPV field:

- |       |   |
|-------|---|
| Blank | Address was not assigned a ZIP+4 by Accumail and therefore no DPV processing was performed. |
| Y     | Address was found in CMRA table   |
| N     | Address was not found in CMRA table   |

---

### DPV FALSE POSITIVE INDICATOR

The DPV False Positive Indicator is the third position in field:

- |       |   |
|-------|---|
| Blank | Address was not assigned a ZIP+4 by Accumail and therefore no DPV processing was performed. |
| Y     | Address was found in False Positive table.  |
| N     | Address was not found in False Positive table.  |

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## FOOTNOTES FIELD

The DPV Footnotes field returns additional DPV information about the address.

These codes are defined as follows:

AA	Input address matched to the ZIP+4 file
A1	Input address not matched to the ZIP+4 file
BB	Input address matched to DPV (all components)
CC	Input address primary number matched to DPV but secondary number not matched (present but invalid).
N1	Input address primary number matched to DPV but high-rise address missing secondary number
M1	Input address primary number missing
M3	Input address primary number invalid
P1	Input address missing PO, RR, or HC Box number
RR	Input address matched to Commercial Mail Receiving Agency (CMRA)
R1	Input address matched to CMRA but secondary number not present

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### **PRE-PROCESSES PERFORMED:**

N = None

Y = Yes but with no data modifications

D = Yes, data modifications from sources other than postal data

P = Yes, data modifications from postal data only (ie: ZIP+4, DPV)

B = Yes, data modifications from postal and other sources

### **CONCURRENT PROCESSES PERFORMED**

N = None

Y = Yes but with no data modifications

D = Yes, data modifications from sources other than postal data

P = Yes, data modifications from postal data only (i.e.: ZIP+4, DPV)

B = Yes, data modifications from postal and other sources

### **POST-PROCESSES PERFORMED**

N = None

Y = Yes but with no data modifications

D = Yes, data modifications from sources other than postal data

P = Yes, data modifications from postal data only (LACSLink™)

B = Yes, data modifications from postal and other sources

### **STANDARD OUTPUT RETURNED**

Y = All NCOALink required output returned to client

N = Post-processes modified return information (i.e.: updates applied to list)

B = Post-processes modified return information; however, separate file containing all required output data was also returned

### **MATCHING LOGIC APPLIED**

S = Standard (Business, Individual and Family matches allowed)

I = Individual only

B = Business only

C = Individual and Business only

R = Individual and Family only

### **DATA RETURNED**

C = COA Data Returned (including footnotes and processing statistics)

F = Footnotes (no COA data included; may include processing statistics)

S = Statistics only (no COA data or footnotes provided)

## CLASS OF MAIL

Alphanumeric. Class of mail to be used for mailings produced from customer mailing list.

A = First-Class only	I = Periodicals & Package Services
B = Periodicals only	J = Standard Mail & Package Services
C = Standard Mail only	K = First-Class, Periodicals & Standard Mail
D = Package Services only	L = First-Class, Periodicals & Package Services
E = First-Class & Periodicals	M = First-Class, Standard Mail & Package Services
F = First-Class & Standard Mail	N = Periodicals, Standard Mail & Package Services
G = First-Class & Package Services	O = First-Class, Periodical, Standard Mail, Package Services
H = Periodicals & Standard Mail	

## NCOA<sup>LINK</sup> RETURN CODES

There are two fields AccuMail frameworks returns for NCOALink. These fields are COACode and COAFound. COAFound is a True/False flag that tells whether an address change was found. Below are the codes that could be returned in the COACode field.

Code = Return Code

Description = Explanation of Return code

Address = "Y" = New Address provided; "N" = New Address not provided

How = "D" = Derived by data – returned in lieu of 11 digit; "S" = Derived by software

Code	Description	Address	How
A	<b>COA Match</b> - The input record matched to a COA record. A new address could be furnished. Please Note: If this return code is achieved, no other matching attempts are permitted regardless of the PROCESSING mode.	Y	D
66	<b>Daily Delete</b> – The input record matched to a business, individual or family type COA record with an old address that is present in the daily delete file. The presence of an address in the daily delete file means that a COA with this address is pending deletion from the COA master file and that no mail may be forwarded from this address. This return code may be returned regardless of the processing mode, matching logic or COA type. Please Note: If this return code is achieved, no other matching attempts are permitted regardless of the PROCESSING mode.	N	S
00	<b>No Match</b> - The input record COULD NOT BE matched to a COA record. A new address could not be furnished. This return code may be returned regardless of the processing mode, matching logic, or COA type. Please Note: When processing in any mode and this return code is received it is required to attempt the match again using the next level of matching logic allowed by the processing mode.	N	D
01	<b>Found COA: Foreign Move</b> – The input record matched to a COA record but the new address was outside the USPS delivery area. This return code may be returned regardless of the processing mode, matching logic, or COA type. Please Note: If this return code is achieved, no other matching attempts are permitted regardless of the PROCESSING mode.	N	D
02	<b>Found COA: Moved Left No Address (MLNA)</b> – The input record matched to a COA record, but the new address was not provided to USPS. This return code may be returned regardless of the processing mode, matching logic, or COA type. Please Note: If this return code is achieved then no other matching attempts are permitted regardless of the PROCESSING mode.	N	D

03	<b>Found COA: Box Closed No Order (BCNO)</b> – The Input record matched to a COA record containing an old address of PO BOX, which has been closed without a forwarding address provided. This return code may be returned regardless of the processing mode, matching logic, or COA type. Please Note: If this return code is achieved, no other matching attempts are permitted regardless of the PROCESSING mode.	N	D
04	<b>Cannot match COA: Street Address with Secondary</b> – In the STANDARD mode utilizing Family matching logic the input record was a potential match to a family type COA record with an old address that contained secondary information. The input record does not contain secondary information. The record is a ZIP + 4 street level match. This address match situation requires individual name matching logic to obtain a match and individual names do not match. Please Note: This return code is only obtained when processing in the STANDARD mode using Family matching logic.	N	D
05	<b>Found COA: New 11-digit DPBC is Ambiguous</b> – The input record matched to a COA record. The new address on the COA record could not be converted to a deliverable address because the DPBC represents more than one delivery point. This return code may be returned regardless of the processing mode, matching logic, or COA type. Please Note: If this return code is achieved, no other matching attempts are permitted regardless of the PROCESSING mode.	N	D
06	<b>Cannot Match COA: Conflicting Directions: Middle Name Related</b> –There is more than one COA record for the match algorithm and the middle names or initials on the COAs are different. Therefore, a single match result could not be determined. This return code is only obtained when using individual matching logic. Please Note: If this return code is achieved, no other matching attempts are permitted regardless of the PROCESSING mode.	N	D
07	<b>Cannot Match COA: Conflicting Directions: Gender Related</b> –There is more than one COA record for the match algorithm and the genders of the names on the COAs are different. Therefore, a single match result could not be determined. This return code is only obtained when using individual matching logic. Please Note: If this return code is achieved, no other matching attempts are permitted regardless of the PROCESSING mode.	N	D
08	<b>Cannot Match COA: Other Conflicting Instructions</b> – The input record was a potential match to two COA records. The two records were compared and due to differences in the new addresses, a match could not be made. This return code may be returned regardless of the processing mode, matching logic, or COA type. Please Note: If this return code is achieved, no other matching attempts are permitted regardless of the PROCESSING mode.	N	D

09	Cannot Match COA: High-rise Default – The input record was a potential match to a family COA record from a High-rise address ZIP + 4 coded to the building default. This address match situation requires individual name matching logic to obtain a match and individual names do not match. Please Note: This return code is only obtained when processing in the STANDARD mode using Family matching logic.	N	D
10	Cannot Match COA: Rural Default – The input record was a potential match to a family COA record from a Rural Route or Highway Contract Route address ZIP + 4 coded to the route default. This address situation requires individual name matching logic to obtain a match and individual names do not match. Please Note: This return code is only obtained when processing in the STANDARD mode using Family matching logic.	N	D
11	Cannot Match COA: Individual Match: Insufficient COA Name for Match – There is a COA record with the same surname and address but there is insufficient first/middle name information on the COA record to produce a match using individual matching logic. This return code is only obtained when using individual matching logic. Please Note: When processing in the STANDARD mode and this return code is received utilizing Individual Logic, discontinue the Individual logic sequence and go straight to the FAMILY matching logic.	N	D
12	Cannot Match COA: Middle Name Test Failed – The input record was a potential match to a COA record. A match cannot be made because the input name contains a conflict with the middle name or initials on the COA record. This return code is only obtained when using individual matching logic. Please Note: If this return code is achieved, no other matching attempts are permitted regardless of the PROCESSING mode.	N	S
13	Cannot Match COA: Gender Test Failed – The input record was a potential match to a COA record. A match cannot be made because the gender of the name on the input record conflicts with the gender of the name on the COA record. This return code is only obtained when using individual matching logic. Please Note: When processing in the STANDARD mode and this return code is received utilizing Individual logic, discontinue the Individual logic sequence and go straight to FAMILY matching logic.	N	S
14	Found COA: New Address Would Not Convert at Run Time – The input record matched to a COA record. The new address could not be converted to a deliverable address. This return code may be returned regardless of the processing mode, matching logic, or COA type. Please Note: If this return code is achieved, no other matching attempts are permitted regardless of the PROCESSING mode.	N	S



15	Cannot Match COA: Individual Name Insufficient – The input record was a potential match to a COA record that contains a first initial and middle initial/name [ex. C M Smith or C Mary Smith]. A match cannot be made because the input middle initial/name is missing or does not equal the middle initial/name on the COA. This return code is only obtained when using individual matching logic. Please Note: When processing in the STANDARD mode and this return code is received utilizing Individual logic, discontinue the Individual logic sequence and go straight to FAMILY matching logic.	N	S
16	Cannot Match COA: Secondary Number Discrepancy – The input record was a potential match to a street level COA record. However, a match is prohibited based on one of the following reasons: 1) There is conflicting secondary information on the input and COA record; 2) the input record contained secondary information and matched to a family record that does not contain secondary information. In item 2, this address match situation requires individual name matching logic to obtain a COA match and individual names do not match. Please Note: If this return code is achieved, no other matching attempts are permitted regardless of the PROCESSING mode.	N	S
17	Cannot Match COA: Other Insufficient Name – The input record was a potential match to a COA record that contains a full first name and full middle name. The input middle initial/name is missing or different from the middle name on the COA. A match cannot be made because the first name on the COA was truncated (drop-n flag) and the middle names must be equal in order to make this match. This return code is only obtained when using individual matching logic. Please Note: When processing in the STANDARD mode and this return code is received utilizing Individual Logic, discontinue the Individual logic sequence and go straight to FAMILY matching logic.	N	S
18	Cannot Match COA: General Delivery – The input record was a potential match to a COA record from a General Delivery address. This address situation requires individual name matching logic to obtain a match and individual names do not match. Please Note: This return code is only obtained when processing in the STANDARD mode using Family matching logic.	N	D
19	Found COA: New Address not ZIP+4 coded or New address primary number not DPV confirmable – There is a change of address on file but the new address cannot be ZIP + 4 coded and therefore there is no 11-digit DPBC to store or return, or the new address primary number cannot be confirmed on DPV. This return code may be returned regardless of the processing mode, matching logic, or COA type. Please Note: If this return code is achieved, no other matching attempts are permitted regardless of the PROCESSING mode.	N	D
20	Cannot Match COA: Conflicting Directions after re-chaining – Multiple COA records were potential matches to the input record. The COA records contained different	N	D

	new addresses and a single match result could not be determined. This return code may be returned regardless of the processing mode, matching logic, or COA type. Please Note: If this return code is achieved, no other matching attempts are permitted regardless of the PROCESSING mode.		
91	COA Match: Secondary Number dropped from COA – The input record matched to a COA record. The COA record had a secondary number and the input address did not. Please Note: This return code is derived from Individual and business matching logic only. If this return code is achieved, no other matching attempts are permitted regardless of the PROCESSING mode.	Y	S
92	COA Match: Secondary Number Dropped from input address – The input record matched to a COA record. The input address had a secondary number and the COA record did not. The record is a ZIP + 4 street level match. Please Note: This return code is derived from individual and business matching logic only. If this return code is achieved, no other matching attempts are permitted regardless of the PROCESSING mode.	Y	S

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