How to prepare **Standard Mail** with **MAILERS**





How to Prepare Standard Mail using MAILERS+4

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MELISSA DATA CORPORATION 22382 Avenida Empresa Rancho Santa Margarita, CA 92688 Phone: (800) MELISSA (1-800-635-4772) Fax: 949-589-5211

E-mail: info@MelissaData.com

Internet: www.MelissaData.com

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Welcome to Direct-Mail Marketing with MAILERS+4

Direct Mail enhances all other marketing campaigns.

Every piece of mail you send represents an opportunity for you to conduct additional business with a customer or prospect. Direct, or advertising mail, can be precisely aimed, tested, and measured. It is a very efficient, low-cost way to enter a market to determine whether there is any interest in your products and services without a big capital investment.

You'll get the greatest return on your investment mailing at Standard Mail[®] over First-Class Mail[®] because of the discounts offered for sharing the workload. When you do some of the processing and sorting, it saves the Postal Service time and money. They pass those savings on to you in the form of postage discounts.

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

Will my mailing qualify for Standard Mail postage rates?

Yes, if you have...

- Sales or promotional messages
- Form letters
- At least 200 sorted, addressed pieces (or 50 lbs.) all the same size, shape and weight
- Mailpieces that weigh less than 16 oz.

No, if you have...

- Personal letters
- Bills, invoices or statements
- Contracts
- Valuables or currency

Good luck with your direct-mail marketing initiative. If you need further assistance, please call on our customer service or technical support staff at 1-800-MELISSA (635-4772.)

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

Additional Resources DMM 201.3 QSG 240a, 240b, 240c

Step 1 — What You Need to Get Started

Checklist:

- Obtain a Bulk Mail Permit from your local post office.
- Determine payment type and obtain authorization from the post office.
- Get materials and supplies from the post office, including rubber bands, trays and sleeves.
- Purchase tie straps.
- Pick up any books or pamphlets including the Quick Service Guide (http://pe.usps. com).
- Obtain a mailing list or sales leads that target your market.

Obtain a Bulk Mail Permit

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

How to Apply - complete and turn in the application: Form 3615, Mailing Permit Application and Customer Profile. When you apply for your permit, you will need to know which postage payment method you want to use.

Payment	Types	and	Requ	uirements
_			• · · ·	

	Form 3615	Other	Other	
	(Yearly fee)	Fees	Forms	
Stamps	Х			
Imprint	Х		Х	
Meter	Х		3601-A	

Determine Payment Type

Precanceled Stamps

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

Meter

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

Imprint

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

Database Files

To process a mailing using MAILERS+4, you will need a database file. You can open the file directly into MAILERS+4, or create a new one from scratch.

Data Entry Using MAILERS+4

- 1 Click Database > Create .
- 2 Select the preset **Quick: Common Fields** and click **OK** to create an empty data structure. Save the empty database in an appropriate location.
- 3 Select the **Format Fields** button. Click **AutoFormat** and then **OK** to format the fields in your new database.
- 4 Click **Tools > Data Entry > Design View**. A data entry template will appear. Save and close the template.
- 5 Click **Database > Append**. Enter the names and addresses of your mailing list and click **Save** after each record.





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

Step 2 — Designing Your Mailpiece

Checklist:

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

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

Making Your Mailpiece Automation Compatible

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

Your automation-compatible mailpiece should:

- ✓ Meet size and weight standards.
- ✓ The aspect ratio (length divided by height) is between 1.3 and 2.5 to 1.
- ✔ Be made of good quality white or lightcolored paper.
- Contain no sharp items including staples.
- ✓ Contain no bulky items larger than 1/4" thick.
- ✓ Be sealed securely with wafer tabs if applicable.
- ✓ Be readable by automation equipment.

How to Measure Your Mailpiece

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



Self-Mailers and Booklets

Mailpieces that are designed to be mailed without envelopes are called self-mailers or booklets. For these pieces to claim letter automation rates, their open edges need to be fastened together. This prevents an open edge from jamming the high-speed processing equipment.

One of the easiest ways to keep the edges together is to use tabs or wafer seals, but you can also use tape or glue. Remember, staples are not permitted. The placement of the tabs depends on the weight (thickness) of the paper.



For detailed instuctions on using tab or wafer seals see QSG 201b and DMM 201.3.14

Letters

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

Cards

Thickness, stiffness, and tear strength are the most important machinability characteristics for cards. Be sure to use at least a 75 pound card stock with a minimum thickness of 0.007".

Minimum and Maximum Sizes

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



Step 3 — Cleaning Your List Before You Mail

Checklist:

- Standardize addresses and add ZIP+4 Codes according to USPS requirements.
- Perform NCOA^{Link} processing within 95 days of mailing.
- Remove costly duplicate records.
- Print CASS Form 3553, sign and date it.

Maintaining Accurate Addresses

Cost-effective, consistent, and timely delivery of every mailpiece depends on an accurate address that is complete and correct in all its elements. An incomplete or inaccurate address needs additional handling, including manual processing, which can delay delivery and increase cost.

Address Hygiene

The addresses in an automation-rate mailing must be matched using a CASS-certified process within 95 days before the mailing date. MAILERS+4 Address Check does this process for you.

The USPS requires that 100% of your automated mailing be CASS processed.



Verifying Addresses Using MAILERS+4

MAILERS+4 makes the process of standardizing addresses and adding ZIP + $4^{\text{®}}$ codes simple and easy.

- 1 Click the **Address Check** button. Select appropriate options for this mailing, and click **Go**.
- 2 MAILERS+4 verifies your addresses against the USPS National Database and displays the results.
- 3 Select **Resolve Addresses** and highlight the address you want to resolve.
- 4 Click **Resolve**. Here you can edit the address and search the database for possible matches.
- 5 Find and highlight the listing that matches the **Range**, **Directional**, and **Street Name** for your record.

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CASS Form 3553

- 6 Click **Replace** to resolve the error, replace the address data in your list, and add the ZIP + 4 Code.
- 7 When you are finished resolving addresses, click on **Close**.
- 8 Click **CASS (Form 3553)** and complete the on-screen information.
- 9 Select CASS Print and your CASS Form 3553 is ready for you to take to the post office.

Address Change and Correction Services

National Change of Address (NCOA^{Link}) is an optional move update service that lets you update your database with the most current forwarding information (for individuals, families, and businesses that have moved) before you mail.

Approximately 15% of the people in your database move every year. Update your records with NCOA^{Link} move-update service from Melissa Data and catch all the movers in your database.

What about addresses that cannot be standardized, or do not have a ZIP + 4 Code?

Direct mailers have three choices when addresses cannot be resolved (coded.)

- 1 Do not mail to those people. Depending on your mailing initiative, it may not be necessary to mail to them.
- 2 Send the mailpiece at a higher non-automation rate. The MAILERS+4 presort will separate the addresses accordingly.
- 3 You can attach a stamp and mail it at First-Class single piece rate.

Preparing Your List for Servicing Using MAILERS+4

- 1 Click Services > Change of Address.
- 2 MAILERS+4 will launch the ListWare application
- 3 Select applicable payment options.
- 2 Format the required fields and start processing your list.
- 3 ListWare will assemble and compress your list. Send the compressed file to Melissa Data via ListWare or using FTP, e-mail, or regular mail.
- 4 Update your original list with the returned data. Melissa Data will notify you via e-mail or telephone when your file is ready for return. Average turnaround is 24 hours.

Checking Your List for Duplicate Records

It is estimated that 10% of every list has duplicate records. Run Duplicate Check to mark and/or remove costly duplicates.

Identifying Duplicate Records Using MAILERS+4

- 1 Click the **Duplicate Check** button.
- 2 Select the search criteria that you want MAILERS+4 to use to find the duplicate records and click **Go**.

MAILERS+4 will process and compile the duplicate records.

- 3 **View** the duplicates on screen for editing, or **Print** out the results report for future attention.
- 4 To edit records, or mark records for deletion, refer to the User's Manual.

How do I remove duplicate records from my list?

When you run duplicate check and select "Mark records for deletion" MAILERS+4 will only flag the duplicate records. In order to permanently remove them:

- 1 Click the **Browse** button to verify the marked records. (Indicated by the checkbox.)
- 2 Go to **Database** > **Pack** and select "deleted" records.
- 3 This will permanently remove the records from your list. It is recommended to make a backup before selecting Pack.
- 4 Running Pack will invalidate your CASS form. Make sure you print your CASS form before packing, or you will need to run Address Check again.

Step 4 — Presorting For Postal Discounts

Sortation Categories

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

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

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

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

How do I accurately measure my mailpiece?

- 1 Take 10-20 assembled mailpieces (including labels, inserts, and rubberbands) and flatten them by hand and release.
- 2 Measure the height of the stack to the nearest 1/8 inch and enter this amount as the thickness.
- 3 Weigh the same 10 pieces to the nearest 0.0001 pound or 0.1 ounce and enter this amount as the weight.
- 4 Enter in the height and width of the piece.
- 5 MAILERS+4 will do the calculations per piece and enter this information on the postage statement.

Presort For Postal Discounts Using MAILERS+4

- 1 Click the **Presort** button.
- 2 Select {- New Mailing -} and click Next>>.

Presort	
Pott Office of mailing Cay <u>SUNDERSTREEME</u> State CA 21P+4 32573 . State CA 21P+4 32573 . . State CA 21P+4 32573 .	Sample Size and Weight Number of picces in sample I 0 Sample Trickness in inches Sample Weight in O to Flece Dimensions Plece Dimensions Plece Apple of mail piece in inches 4.5
Mail Piece Type Postcard O Letter/Card O Flat	Width of mail piece in inches
Rate Type Profit Classroom Science of Agriculture	Aspect Ratio Width / Height 20
Destination Discounts My post office of mailing is: an SCF an BMC/ASF	Use FSM 1000 dmensions Mail Processing Type Nonmachinable
	Help Cancel (< Back Next>>

- 3 Fill in Post Office of Mailing
 - information. (*This is where you obtained your bulk permit.*) You should **Save as Default** if this is the primary post office you use for bulk mailings.
- 4 Mark your selections for Mail Class, Mail Piece Type and Rate Type.
- 5 The information you place in the **Sample Size and Weight** screen is very important for accurate tray sortations and weight rates. Enter the information

	Permit Holder		Prepared For		Mailing Agent
Name:	Ray Melissa				
mpany:	Melissa Data Corp				
Address:	22382 Avenida Emp	resa			
City:	RSM				
State:	CA ZIP: 9268	18	ZIP		ZIP:
Phone:	949-586-5200				
Email:	pay@melissadata.co	m			
ermit #:	123456789				
	Additional Information	1		Payment	
	Seq. #	Mail Date	4/8/2010	Meter ○ Imp	mint 🔿 Stamp 0.1
	Agency Code	Receipt #		Save as default	
	Customer #	CAPS/CTAS			

as accurately as possible and choose **Next >>.**

- 6 Complete the Postage Statement Information including the permit holder and payment type. Click Next >>.
- 7 The **Suggested Mailings** listing will show you what Presort levels your list may qualify for, and what levels it will attempt to sort to, in descending order from the lowest rate. Now click **Go** to initiate presorting.

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

Checklist:

- Review the Qualification Report and Postage Statement and make a copy for your records.
- Prepare to pay the amount of postage due on the Postage Statement.
- Sign the Postage Statement certifying you are in accordance with all USPS rules and regulations.

Postal Forms and Reports

Documentation must be generated by PAVE certified software like MAILERS+4.

PAVE certified means that MAILERS+4 meets the USPS standard of excellence for presort software. Certification at the Gold level



your guarantee that MAILERS+4 surpassed the standard qualification criteria for

presorting and accuracy that includes Standard Mail, First-Class, and Periodicals.

Printing Postal Forms Using MAILERS+4

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

	Mai	ling Results			
Mailing		Containers	Packages	Pieces	Amount
"None Qualified" Enhanced CRR1 STD Automation Letters STD Nonautomation Letters Residual Mating	r ws/HD/LOT Let	0 8 3 1	0 0 1	0 2729 296 10	0.000 659.158 76.609 61.000
sort Time: 5.891 seconds	Total piece	* 3035	To	tal cost 796.7	67

- The rate levels your mailing qualified for after presorting.
- The number of pieces and cost at each rate.
- Your **Total Cost** and **Savings** of the mailing compared to single piece First-Class postage. Click **Next >>.**
- 2 Print the Qualification Report for all of the presorted mailings listed. Highlight one mailing at a time (ie: STD Automation Letters), select Qualification Report and click Print.
- 3 Select **Postage Report>>**, highlight the qualified mailings you want to mail and then **Print** to get the required Postage Statement.
- 4 Click **Finish**.



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User's Guide Chapter 9

Step 6 — Printing the Required Tray Tags for Containers

Checklist:

- Ensure tray tags are printed on correct paper stock, color, and size.
- Verify barcodes are not truncated when torn apart, if using pre-perforated paper.

Printing Tray Tags Using MAILERS+4

- 1 While still on the Presort Reports screen, select **Tray and Sack**.
- 2. Click **Print**.

Tray Tag Information

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

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

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



Step 7 — Printing Your Address Labels

Checklist:

- Verify the data on the label is printed according to USPS guidelines.
- Verify automation barcodes are not truncated and have the correct number of bars.

Formatting Addresses Correctly

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

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

 Implify
 Implify

Using Proper Type Style

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

- ✓ Use simple sans serif type (like Arial) with uniform thickness.
- ✓ No bold, italic, extended or condensed type styles.
- ✓ Point size between 10-12 points.
- ✓ No kerning, overlapping of characters, or words too close together.
- ✓ Address block cannot be skewed more than 5 degrees. Be careful when attaching labels.
- ✓ Using uppercase characters throughout the address block is preferred, but initial or title caps are acceptable.
- ✔ No punctuation.
- ✓ Left-justify every line in the address block.
- ✓ Use two-letter state abbreviations.
- ✓ Use one space between the city and state, two spaces between the state and ZIP + 4 code.

What are the Elements of an Address Label?

- City, State, ZIP + 4
- Delivery Address
- Suite / Apartment
- Ocompany
- Name / Attention
- Optional Endorsement Line
- Intelligent Mail™ Barcode
- Image: Book PostNet™ Barcode

Do I need an Optional Endorsement Line?

An Optional Endorsement Line can save you time and money. Instead of applying stickers, MAILERS+4 will print the endorsement information on the address label to make packaging easier.

Printing Address Labels Using MAILERS+4

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



4 Select the following Sequence commands: Presort Order, Normal Sequence, All Pages and click Next >>.

- 5
 =
 5-DIGIT 12345

 3
 =
 3-DIGIT 123

 X
 =
 MXD ADC 123

 A
 =
 ALL FOR ADC 123
 - 5 Select the following Presort Options: The mailings from the Job List you wish to mail, print the Endorsement Line on all pieces, and a Header Label between tray changes. Select Next >>.

Job List	Separator Label
STD Automation Letters	CRRT WS/H
STD Nonautomation Letters	O Marker
Residual Mailing	O Pause
	Blank Label Header Label
Endorsement Line	None Apply
 On First Label of Package On Last Label of Package 	Tray Change
On All Labels	Tray / Package Change

- 6 Select a compatible printer driver from the listing. Selecting Windows Driver is best for small ink jet and laser printers and will use your default printer in the Windows Control Panel. Select Next >>.
- 7 Click **Preview** to verify your labels will print as expected, and click **Print** to start printing labels.

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Checklist:

- Peel labels in order from left to right.
- Keep labels and mailpieces in the same order as the Qualification Report.
- Place labels in the proper location—with less than five degree skew—on the mailpiece.
- Ensure OCR readability according to USPS guidelines.

Mailpiece Clear Zones

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

OCR Read Area - Extraneous (non-address) printing in the OCR read area can

cause the rejection of the mailpiece. Be sure to have at least 1/2" all the way around the label.

You may place non-address printing such as company logos, advertising, and die cuts within the OCR read area only if you position this printing so that the lowest point is above the delivery address line. **Return Address** - The return address must be above the OCR read area and should be printed in a type size smaller than the type size used in the delivery address.

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

Address Labels

Be sure to use address labels that are at least 3.25" long to ensure proper fit of the barcode. When applying labels to your mailpiece, be sure to place the label on straight within the OCR read area so there is less than a five degree skew.





(Not Actual Size)

Step 9 — Assembling Your Mailpieces Into Containers

Checklist:

- Insert barcoded tray tags into holders.
- Place mailpieces into trays according to the Qualification Report.
- Sleeve and strap appropriate trays.

First - Label Trays

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

Second - Prepare Automation Sorts

It is easiest to start assembling the automated pieces first because packaging is not allowed. Since the endorsement line reflects each tray, match up pieces to the "Tray Zip" and "Tray Level" categories on the Qualification Report and place the mailpieces into the tray. Pieces in full trays should not be rubberbanded.





Trays usually come in 1-foot and 2-foot lengths. Look at the Qualification Report in the "Tray Size" column to determine which to use.

When placing pieces or packages into trays, make sure the addresses face the front of the tray.





How do I rubberband packages?

If your package is 1"-6" thick, place the first rubberband lengthwise, and the second rubberband around the height.

If your package is less than 1" thick, only place one rubberband around the height.



Third - Prepare Non-Automation Sorts

Next, assemble the package-based non-automation mailing. Now, the endorsement line reflects packages, not trays. These non-barcoded pieces must be rubberbanded according to the groupings, "Package Destination," on the Qualification Report and then placed in the corresponding trays.



Fourth - Sleeve & Strap Trays

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



Step 10 - Taking It All to the Post Office

Checklist:

- Gigned CASS Form 3553.
- Gigned Postage Statement.
- Printed Qualification Reports.
- □ Sleeved and strapped trays.
- Payment ready.
- Deposit mail early in the day.
- Pick up extra supplies.

Verification & Acceptance of Mail

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

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

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

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

Sources of Postal Information

Business Mail Entry Unit (BMEU)

Name of Unit Manager

Extension

Additional Contact

Extension

Address

Telephone Number

Telephone Number (Account Balance Information)

Hours of Operation

Postal Business Center (PBC)

Address

Telephone Number

Hours of Operation

Melissa DATA

22382 Avenida Empresa Rancho Santa Margarita, CA 92688-2112 800-635-4772

Office Hours: Mon - Fri 8 AM - 5 PM PST Tech Support: Mon - Fri 6 AM - 5 PM PST

Where to Find More Information

Throughout this guide, you may want to reference the USPS Quick Service Guide (Pub. 95) for more information. You can get this free guide from your Network Distribution Center.

Be sure to jot down the information of your local Business Mail Entry Unit at your local post office or the nearest Postal Business Center.

Our technical support staff is always available to answer your questions regarding MAILERS+4 or postal regulations. Feel free to give us a call at 1-800-MELISSA.

At the bottom of most pages are resources for additional information. Most of these documents can be found in:

- Domestic Mail Manual (DMM)
- Quick Service Guide (QSG)
- MAILERS+4 User's Manual
- Postal Explorer (pe.usps.gov)

Additional Resources Notice 67 Automation Template DMM 602, 708.4 QSG 240a User's Guide Chapter 7