

# TechLines

## Technical Information Sheet

M2

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## Mail Sortation Services available

In-house list processing services are available to convert your database into a CASS-certified presorted list, optimized for postal discounts, and ready for ink jet imaging, printing labels or printing on our digital press.

Please review the following points before sending your mailing data to us. If you have any questions beyond the scope of this document, please feel free to contact your customer service representative.

### Record Import

We must convert your list into our system format and insert extra fields for CASS and other postal processing. Your list must be supplied as a data file with fixed fields for name, address, city, etc. Label images and word processor tables require extra work if usable at all. We suggest using one of the following structures:

- Delimited; comma or tab
- Fixed length records
- MS Access
- MS Excel
- FileMaker
- .dbf files

Compression using WinZip or Stuffit is encouraged, especially for e-mail transfers.

Files may be transferred to us by FTP (separate TechLines available) or for small files (less than 5Mb) by e-mail. Data may also be sent on CD or DVD-ROM, 3-1/2" diskettes, lomega zip disks or 9 track IBM tapes.

*Other formats and media may be workable. Please check with us if you need other options. We always suggest sending files for testing prior to submission of the actual production lists.*

### Data structure and consistency

Good mailings start at data entry. Proper data structure and consistency of field use will aid in obtaining the best postal presort. CASS processing looks at three address data fields with city, state and zip to assign or validate delivery point zip code information. National Change of Address (NCOA) looks at the name data field to find person's name and the company data file for company name information. The incorrect data in these fields will mean no match can be made. The software needs to have the right data in the right field – if you supply data in an inconsistent manner, it will import that way, too.

Use separate fields for each address line, and separate fields for city, state and zip.



## **Merge and Append Codes**

If you have data in several formats, or want us to assign codes or messaging at import, send the lists for each in separately. We are glad to merge the files together.

## **WARNING – Truncation of Data**

Data that is supplied too long to fit in the allowed print area will be truncated. This may affect the deliverability of some mail, especially if important address information is attached to the end of an excessively long line. Forty characters should be considered the maximum without prior arrangements.

An excessive number of data lines can also result in some data being lost. There can be equipment or space limitations. In general, limit data to six lines, including any key line, and city-state-zip line.

## **Foreign Records**

For the most part, lack of a valid USPS zip code will keep foreign records from being included in a domestic mailing. However, some countries use codes that are similar to our USPS zip codes – if included in a domestic presort, these pieces will be mailed to the U.S. city corresponding to that code. It is best to send foreign and Canadian records in a separate file. Include a field only used for the country name and, for the best rates to Canada, include the postal code as a separate field.

## **Standardization and CASS**

In order to claim automation rates, records must be passed through CASS processing prior to presort. CASS is intended to validate the zip code – it does not fix or eliminate bad addresses. First the data is standardized – street is abbreviated to ST, directionals are set to conform to postal standards and the like. Data considered by the post office as not part of the main USPS address will be moved to a secondary line or eliminated if the lines are full. The record is then matched against the USPS database of address ranges. The first attempt is made using the primary address line. If a match is made, a +4 and delivery point code is added on.

If not, the secondary address line is evaluated. If that matches, the primary and secondary lines are swapped and the add on made. It will also evaluate a third line, if needed, with the same swapping. CASS may also try to correct spellings and fix 5-digit codes.

## **Sortation**

We can provide presorts for First Class, Periodicals, Standard and Package Services mailings. We use palletization and Mail.Dat files to evaluate drop ship options and optimize postage rates. If you have non-profit mailing privileges at another post office, we will help obtain additional entry office authorization. Our software is PAVE Gold certified for all levels.

## Output

Before generating the final output, either as an electronic file for inkjet or digital printing, or printing on paper or pressure sensitive labels, we will ask you to review a mock up. This will show where data is to be printed and what the content of each line is to be. Please check this carefully – it is used to guide print setup. This will show any keyline or customer information, and any wording you have asked to be slugged in.

***The following optional procedures are offered at additional cost.***

### Duplicate Elimination

A matchcode is made by taking parts of different fields, applying some filters, and calling records having the same matchcodes as duplicates. The way the matchcode is made controls how aggressively the dupe elimination process is. We can also process using concurrent multiple matchcodes. Call us to discuss your goals in removing dupes.

### NCOA/LACS Processing

NCOAlink is National Change of Address, a process that updates records of addressees with a new address – if a move has been registered with the USPS. In order to get a match, the original record must have a correct addressee name and a correct previous address. NCOA first passes the record through CASS, then the NCOA database so the same CASS changes may occur.

NCOA can be done against a 48-month or 18-month database, the 48-month process includes LACS processing. LACS – Locatable Address Correction System – will provide changes made by zip code realignments or other address reassignments such as rural route to fire code conversions.

NCOAlink FSP (the 48-month product) is processed by Donnelley Marketing through BCC software. NCOAlink LSP (18-month) is done by BCC software.

### Other Hygiene Options

There are other optional processes you may choose to use in managing your lists.

**DPV** (Delivery Point Validation) matches records against a database of all deliverable addresses, similar to CASS, but the database is not limited to address ranges. It may mark records that a carrier would deliver as non-existent, however, and needs to be used with caution.

**DSF** (Delivery Sequence File) – will add walk sequence numbers for saturation rate mailings.

**AEC** (Address Element Correction) is a process done by the USPS to try to fix records that CASS cannot resolve. Slow and expensive, this may be something to use to try to get some house records up to standard.

**DMA Suppression** will match records against the Direct Marketing Association's do not pander list. We can also suppress for deceased, nursing home, prison, college, trailer park, military or business addresses.

**Geo Coding** – adds latitude and longitude for distance and location calculations



## **Delivery Statistics File and Saturation Mailings**

Mailing to every address on a certain postal route is possible. For most, this will require obtaining a mailing list of addresses.

But for governmental agencies, mailings can be prepared by simply generating a top slip for each bundle and sending the needed number of pieces to each post office. The Delivery Statistics File is used to obtain the counts for addresses on each route.

## **Reporting**

Standard output includes USPS Form 3553 (CASS), facsimile postage statement and package audit report. These are required by the USPS for mail acceptance. Container labels are also printed to be used in preparing the mailing.

Additional reporting is available to document many different aspects of the process. Let us know your needs and we will work to help at a reasonable cost.

## **Messaging and Graphics**

Variable printing offers the opportunity to customize messages and add variable graphics. Names can be embedded into messages, different messages to different groups, maps to the closest store, variable special offers in a starburst or last issue notifications. Use your imagination! Then let us setup a sample for you.