

Canadian National Change of Address (NCOA)

NCOA : [Step-by-Step User Guide \(English\)](#)

[Guide de l'utilisateur étape par étape \(French\)](#)

WHO NEEDS TO USE THIS PORTAL:

- **Service Providers:** lettershops, mail houses, data processors. If you are processing NCOA on behalf of a third party, you are required to create an account and agree to Canada Post's Terms of Use. This will provide a Service Provider Terms of Use ID which you will need to enter into the software in order to process NCOA on your clients' behalf.
- **End User:** mail owners. If you are using NCOA to process your own mail lists or having a third party process your lists for you, you are required to create an account and agree to Canada Post's Terms of Use. This will provide an End User Terms of Use ID which you will need to enter into the software (or provide to your Service Provider) in order to access the NCOA service.

The following links have been provided by Canada Post.

Product Page (for more information on the NCOA program):

www.canadapost.ca/moverdata

www.postescanada.ca/donneesdemeneurs

Sign-In Page (to accept the Terms of Use):

www.canadapost.ca/NCOA

www.postescanada/PNCA

STEP 1 – are you a Service Provider or an End User?

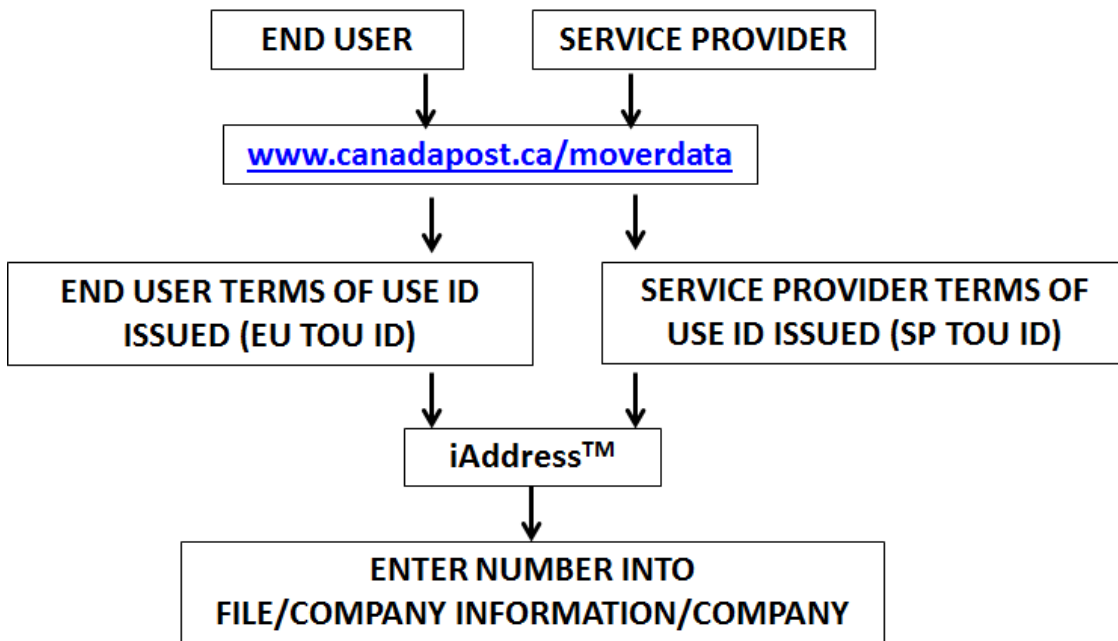
You are a **Service Provider** if you:

- Clean files on behalf of other companies
- Create mailings on behalf of other companies

You are an **End User** if you:

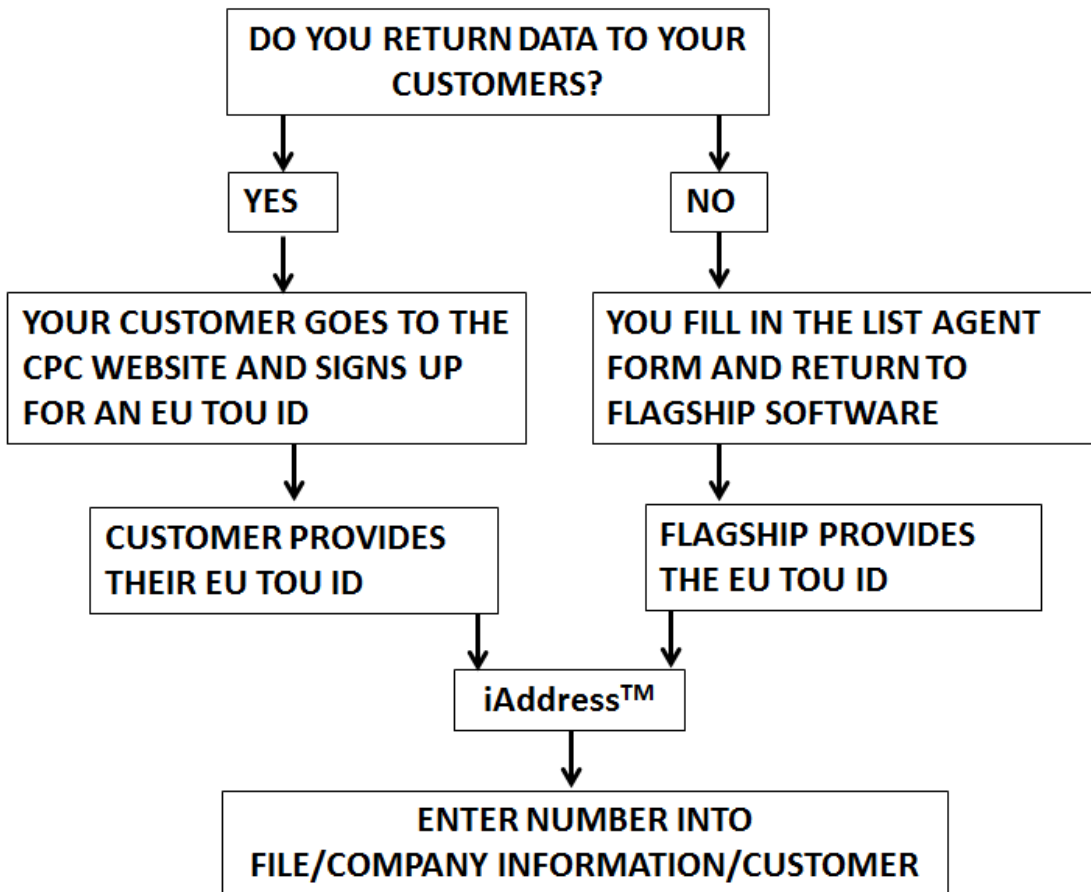
- Clean your own database
- Create mailings on your own behalf

STEP 2 – Register on the Canada Post website



STEP 3 – Service Providers only (End Users, skip to Step 4)

- A List Agent form may be requested by emailing ncoa@flagshipsoftware.com.



STEP 4 – Processing Jobs in NCOA

- When running NCOA in iAddress™, you are required to select an End User Terms of Use ID (EU TOU ID) from a list of those entered in your software. You MUST have an EU TOU ID to process NCOA.

Job Wizard

Select how iAddress should handle the results from the move update

Job Name
aaaNewdemoList

End User
ABC Company

NCOA Matching

Apply Matches Purge Nixies

Additional Move Update Services

Run Deceased Purge Deceased

Run DNM Purge DNM

Match First And Last Name
 Match Last Name Only
 Match Address Only

Run In Secure Mode

< Back Process Cancel

The link to the Terms of Use portal is as follows:

www.canadapost.ca/NCOA

Entering and using ToU ID numbers in iAddress™

These numbers will be entered in the same location as your account and agreement numbers. Instructions are as follows:

To enter YOUR Terms of Use ID:

1. Open iAddress™ and close out of the opening screen.
2. Go to File/Company Information.
3. On the Company Information tab, click the button marked “CPC & USPS Account Numbers and IDs”.

IA Company Information

Seed Records Seed Groups Job Details

Company Information Customer Information U.S. Publication Information

Company Name

Contact Name

Address

Telephone Number () -

City Province/State

Postal / Zip Country

Email

CPC & USPS Account Numbers and IDs

Settings OK Cancel

4. Enter your information in the field labeled “NCOA Terms of use ID” and click “Done” to return to the main screen.

Customer ID Codes

Canada Post

Account Number 1234567 Contract Number

NCOA Terms of use ID

Unites States Postal Service

Permit Number [Go to Business Customer Gateway](#)

PAF ID Mailer ID CRID

 123456789-

Done Cancel

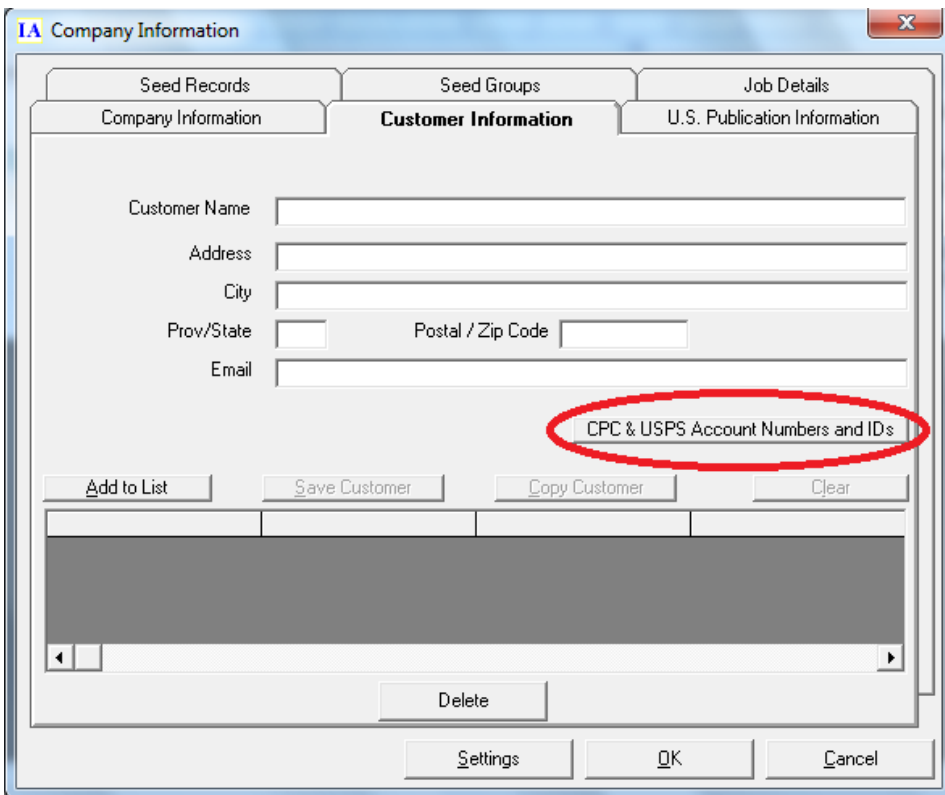
NOTE: If you are processing your own mailing list, then you will require an EU Terms of Use ID which will be entered in your own company profile as circled in red above.

To enter YOUR CLIENTS' Terms of Use IDs:

1. Open iAddress™ and close out of the opening screen.
2. Go to File/Company Information.
3. Click on the Customer Information tab.
 - a. If your customer's information is already added, double click on their entry and click the button marked "CPC & USPS Account Numbers and IDs". Enter their Terms of Use ID and click "Done". Remember to click "Save Customer" before clicking "OK" to leave the screen.

OR

- b. If this is a new customer, add their name and address information and click the button marked "CPC & USPS Account Numbers and ID". Enter their Terms of Use ID and click "Done". Select "Add to List" then "OK" to leave the screen.



Using the Terms of Use when processing NCOA:

1. Select "Process Move Update NCOA+" from the Move Update NCOA menu.
2. Identify your name fields and click "Next".
3. Use the End User drop-down to select the appropriate mail owner for this job. Make any other option selections, then click "Process".

IMPORTANT:

Only End User Terms of Use IDs will appear in the End User drop-down. NCOA processing is not permitted using a Service Provider or Service Bureau number. End User ToU IDs start with an EU.

If you require further assistance, please contact our support team: support@flagshipsoftware.com or 1-866-672-0007 x. 3