

# iAddress™

# For Microsoft Windows English User Manual

Version 4.0

FLAGSHIP SOFTWARE LTD. MANUAL VERSION 4.0 | 1

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# Introduction

Congratulations on purchasing iAddress<sup>™</sup>. You are now ready to correct the addresses in your databases and validate them against Canada Post or USPS' requirements. As well, iAddress<sup>™</sup> will sort your mailing databases into the proper sequence, print mailing labels and generate mailing reports.

This manual will familiarize you with the utilities and features found in the iAddress<sup>™</sup> product. You will learn, in detail, the step-by-step processes in iAddress<sup>™</sup>, from creating jobs, to printing labels.

IA Welcome to iAddress			×
	Ad	dre	955
○ Create a <u>N</u> ew Job	С	Use the Job <u>W</u> i	zard
O Open an <u>E</u> xisting Job	(•	Open a <u>R</u> ecent	Job
Jobs AutoSaved Jobs 2017-07-11 13-20-08 tes	t US-Corre	ection.pjf	
2017-07-11_13-19-37_tes	t US-Creat	teJob.pjf	
2017-07-11_12-19-00_tes	t US-Corre	ection.pjf	
2017-07-11 11-48-06 aas	New demoLi	ist-Correcti	ion.pjf
2017-07-11_11-45-43_aaa	New_demoLi	ist-CreateJo	b.pjf
2017-07-11_11-27-06_aas	New_demoLi	ist-CreateJo	b.pjf
2017-07-11_11-12-32_201	7-07-11_11	1-07-13-Cori	ection.pjf
2017-07-11_10-41-40_aaa	wew_demorp	ist-createJo	b.pjr *
AutoSave directory size: 164 MB			-
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# Additional Products Available from Flagship Software Ltd.

#### Geocoding

Harness the power of iAddress<sup>™</sup> Geocoding to enhance your data and focus on relevant offers in a specific geographical area for all your targeted marketing needs! iAddress<sup>™</sup> Geocoding will convert postal address data into longitude/latitude coordinates, enabling a more precise selection of data. Many filtering options are available to tailor your data

by distance, number of records and non-geocoded addresses. Available as an add-on utility and designed to seamlessly integrate with iAddress<sup>™</sup>.

#### iFuse

Simplify your small mailings with iFuse! This module works seamlessly with iAddress<sup>™</sup> to create a series of merged reports by selecting multiple iAddress<sup>™</sup> jobs of similar qualities. The result is three combined reports: Validation, Statement of Mailing and Mailing Plan which can be uploaded to Canada Post. Available as an add-on to iAddress<sup>™</sup> full version.

#### AddressMinerPRO

Is a separate utility designed to help manage disorganized data files. AddressMinerPRO can extract address data from files where there is no order or discernible structure, and where address data is stored in single fields. Previously, in order to work with a file like this, you would have had to manually edit the file to properly order the fields. This can be very difficult and tedious with files that contain thousands, or even hundreds of thousands of records.

#### NCOA

Keep your Canadian customer files current even if they relocate. Using Canada Post mover data, process lists in real-time to ensure you stay in contact. Standard NCOA processing includes access to the mover data as well as do-not-mail and enhanced deceased suppression at no additional charge. Requires signing the appropriate Terms of Use with Canada Post annually.

#### NCOALink

Keep your US customer files current even if they relocate. Using USPS's NCOALink data, process lists in real-time to ensure you stay in contact. Available as an annual, unlimited license, NCOALink processing requires annual signing of a USPS Processing Acknowledgement Form.

#### **iEnvelopePRO**

Want to make your mail stand out above the crowd? Your solution is iEnvelopePRO! This stand-alone utility provides design tools to create a unique custom-made envelope from invoices to advertisements. This easy-to-use, drag-and-drop software accepts most database formats including Access, Excel, dBase and text files and allows insertion of Fixed, variable and rotated text, along with Graphics, indicias, permits and barcodes. iEnvelopePRO is compatible with most production ink jet printers using your installed Windows<sup>™</sup> drivers and seamlessly integrates into iAddress<sup>™</sup> when installed on the same computer.

#### iMark PRO

iMark PRO is the plug-and-play answer to your inserting needs! This is a simple-to-use, Windows PC based drag and drop interface and requires no modifications to existing applications. Grouping and sorting documents is easy with iMarkPRO. There's no need for an expensive, IT-based solution! Let iMarkPRO reduce your printing and postage costs and increase productivity by sorting through your unprinted documents and collating the pages for the same recipient in one envelope or by emailing the customer. Available as a stand-alone product.

### **Before Getting Started**

Before you start to use iAddress<sup>™</sup>, you should ensure that your databases are in good order. This means that you should have correct address information and proper Postal Codes<sup>OM</sup> or Zip Codes.

iAddress<sup>™</sup> requires you to have sufficient disk space on your hard drive so that the program utilities can run efficiently. The disk space required can be calculated, as follows:

- Determine the size of the database you will be sorting into the Canada Post LCP.
- You need 2.5 times the size of the database.

If you have this amount of disk space on your hard drive, you are ready to use iAddress™.

# Copying Data from a CD

To ensure iAddress<sup>™</sup> is running as efficiently and quickly as is possible for your system, it is required that the appropriate data files are copied to your hard drive. iAddress<sup>™</sup> has an automatic install and update utility that will download the latest files over the internet. The downloader can be accessed from the "Tools" menu.

The following instructions can be followed should you wish to copy data from the CD instead of using the automated process.

#### **Copying Data:**

From the "File" menu click on "Copy US Data" for the US Data, or "Copy Canadian Data" then "Download" or "DVD" for the Canadian Data. If you are selecting to copy data from the DVD, then please ensure that the DVD with your desired data is in the DVD tray.

IA	iAddress							– 🗆 X
File	Address Management	Move Update	Geo	coding Presor	t Print	Tools	Help	
	Create Job	Ctr	l+J	1				Copyright Flagship Software Ltd 2000-2016
	Create AddressMinerPR	0 Job		News I				Version 4.0.0
	Create ODBC Job							(W) [Data 1] CA: 06/16/2017 16 07/13/2017 (S) [Data 2] CA: 07/14/2017 To 08/17/2017
	Open Job	Ctrl-	+0					(M) US Correction/DPV: 06/15/2017 To 09/28/2017
	Open Recent Jobs							(M) US Lookup: 05/15/2017 To 08/31/2017
	Save Job	Ctrl	+S					(P) US Label Lists: 06/01/2017 To 07/31/2017
	Merge into Job	Ctrl+	M					
	Job Wizard		>					^
	View Database	Ctrl	+D					
	Export Database	Ctrl	+E					
	Extended Export							
	Company Information							
	Preferences					_		
	Copy Canadian Data		>	Download	4 D			
	Copy US Data			DVD	-			
	Exit							
		_						

IA iAddress					– 🗆 X
File Address Manageme	ent Move Update Geo	coding Presort	Print Tools	Help	
Create Job	Ctrl+J	1			Copyright Flagship Software Ltd 2000-2016
Create AddressMine	erPRO Job	h Nama:			Version 4.0.0
Create ODBC Job					(S) [Data 2] CA: 06/16/2017 To 06/73/2017 (S) [Data 2] CA: 07/14/2017 To 08/17/2017
Open Job	Ctrl+O				(M) US Correction/DPV: 06/15/2017 To 09/28/2017
Open Recent Jobs					(M) US Lookup: 05/15/2017 To 08/31/2017
Save Job	Ctrl+S				(P) US Label Lists: 06/01/2017 To 07/31/2017
Merge into Job	Ctrl+M				
Job Wizard	>				^
View Database	Ctrl+D				
Export Database	Ctrl+E				
Extended Export					
Company Informati	on				
Preferences					
Copy Canadian Data	a >				
Copy US Data					
Exit	20				
		-			

# **Entering your Company Information**

In the file menu scroll down to "Company information". Here you can enter information you would like to be visible in reports.

Address Management	Move Update Ge	ocoding	Presort Prin	t Iools	Help	
Create Job	Ctrl+J					Copyright Flagship Software Ltd 2000-2016
Create AddressMinerPF	RO Job	b Name:				Version 4.0.0 (W) [Data 1] CA: 06/16/2017 To 07/13/2017
Create ODBC Job			1			(S) [Data 2] CA: 07/14/2017 To 08/17/2017
Open Job	Ctrl+O					(M) US Correction/DPV: 06/15/2017 To 09/28/2013
Open Recent Jobs						(M) US Lookup: 05/15/2017 To 08/31/2013
Save Job	Ctrl+S					(P) US Label Lists: U6/01/2017 To 07/31/2017
Merge into Job	Ctrl+M					
Job Wizard	>					1
View Database	Ctrl+D					
Export Database	Ctrl+E					
Extended Export						
Company Information	2					
Preferences	•0					
Copy Canadian Data	>					
Copy US Data						
Exit						

The first tab, "Company Information" requires the following:

- Your company's name
- Your complete mailing address

If you are creating mailings for your customers, enter the customer's name and Canada Post number on this screen.

IA Company Information			×
Seed Records	Seed Groups	Job De	tails
Company Information	Customer Information	U.S. Publication I	nformation
Company Name Contact Name Address Telephone Number City Postal / Zip Email	Flagship Software LTD.         Miss Fabulous         203-60 King Road         (416) 410-6357         Richmond Hill         Provine         L4E2J4         MissFabulous@flagshipsoftware.com         CPC & USPS Account for the second second second second for the second second second second second for the second second second second second second for the second sec	ce/State ON Country CA m Numbers and IDs	
L	<u>S</u> ettings	ок	<u>C</u> ancel

IA Company Information			×
Seed Records	Seed Groups	Jo	b Details
Company Information	ustomer Information	U.S. Publica	ation Information
Customer Name			
Address			
City			
Prov/State	Postal / Zip Code		
Email			
	CP	C & USPS Account	Numbers and IDs
Add to List Save Custon	ner <u>C</u> opy Cust	omer	Clear
CustomerID CustomerName	CustomerNumbe	r USPS_F	PermitNumber
		147852	74125896
	Delete		
	<u>S</u> ettings	<u>0</u> K	<u>C</u> ancel

Both the company and the customer information screen have a button to enter the various ID's used by CPC and USPS. By clicking this button you will be taken to a new screen where you can enter at the very least, your CPC account number and/or your USPS mailerID & CRID.

🕄 Customer ID Codes			×
Canada Post Account Number		Contract Number	
Unites States Postal Service Permit Number	Add Remove	Go to Business Cu	istomer Gateway
PAF ID	Add Remove	Mailer ID CRID	Add Remove
			Done Cancel

The Job Details screen stores the Canada Post database serial number as well as the Office of Deposit information.

IA Company Information		×
Company Information	Customer Information	U.S. Publication Information
Seed Records	Seed Groups	Job Details
Serial Number of the Delivery Mode Data CD Office of Deposit Office of Deposit Postal / ZIP Tax at 13 % Origin Zip Origin City Origin State	P3102025561101  Office  PC List Offices of Depos	Ex: Toronto ON Site Number
	<u>S</u> ettings	<u>O</u> K <u>C</u> ancel

# **Seed Records**

You can create seed records to add to your database. Add the records using the Seed Records tab under the Company Information screen. The seed records will be stored as a separate database that you can add to your current job using the "Add to Current Database" button. Normally seed records are added at the Select Address screen (described later in the manual).

Company I	nformation				×
Com	pany Information	Custo	mer Information	U.S. Pub	lication Information
See	d Records	See	d Groups	Jot	Details
First Name Name1		Last	Name	Name3	3
Add Add	ress1 ress2		Province	PC PC	
	ID FNAM	New Record	Overwrit	, e/Add Record NAME	2 Delete NAMI
•			Add	to Current Database	•
			<u>S</u> ettings	<u>0</u> K	<u>C</u> ancel

You can group your seed records by using the Seed Group tab. This is useful if your customers have specific addresses they would like added to their databases only.

	Customer	r Information	U.S. Publication Inf	formation
Seed Records	Seed G	iroups	Job Details	
Seed Groups				
······ Default			Create Gro	oup
			Rename Gr	oup
			Delete Gro	oup
			Add To Gro	oup
			Persoue From	C
			Hellove Holl	Group
Seed Records	LNAM	NAME1	NAME2	Laroup
Seed Records	LNAM	NAME1	NAME2	Group
Seed Records	LNAM	NAME1	NAME2	N.

- Create a group by clicking the Create Group button and giving the group a name. Then add records to this group by selecting the appropriate seed records and clicking the Add to Group button.
- To remove addresses from a group, select the record in the Seed Group and click Remove from Group. You can rename your group using the Rename Group button or remove an entire group by clicking Delete Group.

# Registration

Serial numbers were issued with your software purchase; if you were not issued serial numbers or do not have a record of them, please contact Flagship Software technical support. Once you have your serial numbers, select Register from the Help menu.

IA iAddress	– – ×
File Address Management Move Update Geocoding Presort Print To	ls Help
Record Count: 5656 Job Name: aaaNew_demoList	Help Content       Version 4.0.0         Newsletter       Email Support         Email Support       CA: 06/16/2017 To 07/13/2017         Remote Support       DPV: 06/15/2017 To 09/28/2017         Version       kup: 05/15/2017 To 08/31/2017         Re-register       About

The following screen will appear:

IA Product Registration		×
You will need to be connected to t	he internet to proceed.	
Company Name		
Contact Name		
Contact e-mail		
Address 1		
Address 2		
City		
Province/State		
Postal Code/ZIP		
Serial Number		
Register Offline	Submit	Cancel

# File

# **Viewing your Database**

View Database permits you to view your iAddress<sup>™</sup> database in a table-style view. You may edit or delete records in this mode.



From the File menu, select "View Database". The following screen will appear:

IA D	atabase Vie	w									_			×
<u>R</u> ef	fresh	<u>S</u> earch	<u>D</u> e	lete	L	ookup	Pri	nt <u>A</u> ddresses	h	<u>l</u> erge	Add Fi	eld	<u>C</u> lo	ose
	C Valids		01	Incorrect	able	C Dunli	cates	(	- Une	oded			ـــــــــــــــــــــــــــــــــــــ	
@ All	i i anao	C Correcte	d C	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	O Que	stionable	C	Common	0110	.0000				
					 [7		~		1	_	1			
	<b>.</b> .					Next		Previous		<u><u>+</u></u>	irst		Last	
Record	Count:	5656 .	Job Nan	ne: a	aaNew_den	noList	File:	C:\U	lsers\b	isma\Dov	vnloads\Tes	t-Ref-	Files\aaa	New_de
	ID	FNAM		LNAM		ADD		ADD2		CITY		PRO	V	-
	1	TIMOTHY ED	)WARE	SIMON		228 POPLAR	DR			DARTMO	DUTH	NS		
	2	CECILE		AUDET	TE	43 RUE DES	ANCE:			SAINT-JE	AN-SUR-R	QC		
	3	LINDSAY J		THOMA	.S	3205 TURNB	ERRY			BURLING	GTON	ON		
	4	LEONA		GLENN	ON	700 BAY ST A	VPT 30			SAULT S	TE MARIE	ON		
	5	COURTNEY	В	SWANN	1	3169 GREEN	FIELD			AYB		ON		
	6	STEPHEN JO	DHN	WAKEM	IAN	46 ROCKY RI	DGE L			CALGAR	Y	AB		
	7	COLLEEN		MAYES		9906-158 STF	RET			EDMONT	ron -	AB		
	8	LOUISE HEL	ENE	GRENIE	R	8270 RUE DL	INANT			SAINT-LE	EONARD	QC		
	9	JOYCE M		MASON		PO BOX 109				STELLAP	RTON	NS		
	10	JEAN G		PARSO	NS	RR 1 BOX 4				BRYANT	S COVE	NL		
	11	FRANCOIS F		THIBOD	EAU	98 CH DE LA	VALLE			LA MALB	AIE	QC		
	12	DONALD R		SKINNE	:R	PO BOX 43				CARBON	IEAR	NL		
	13	HEATHER L		MUIR		654 NORTH F	RASE			QUESNE	Ľ	BC		
	14	HEATHER L		MUIR		654 NORTH F	RASE			QUESNE	Ľ	BC		
	15	SYLVIE S		GIRAR	)	106 STE-GEN	EVIEV			QUEBEC		QC		
	16	PIERRE		MARTIN	IEAU	530 PAPINEA	U RAN			ABBOTS	FORD	QC		
	17	KERWIN		SUTTO	N	9017 136B ST	•			SURREY	,	BC		
	18	ARTHUR		MCCLU	RE	90 RUE CLEV	'ELANI			DANVILL	.E	QC		
	19	LOUISE		MALTA	S	4460 6E AVE	0			L'ASCEN	SION	QC		
	20	DAVID		CRYDE	RMAN	C6 EDWARD	SBUR(			KEMPTV	ILLE	ON		
	21	SHEILA		PETER	SON	PO BOX 1872				JASPER		AB		
	22	REAL		RUICH	FR	14 BHE GEBI	MAIN			SAINT.IP	R.RITP.MA	loc .		

In this view, you may look at:

- All addresses
- Valid addresses only
- Corrected addresses only
- Uncorrectable addresses only
- Duplicates only
- Common records only
- All fields within the database

You can print some or all of your addresses from the View Database screen, if you choose.

#### Note:

Valid, corrected and uncorrectable addresses can only be viewed after validation/correction has been run on the job. Duplicates and common records can only be viewed after duplicate extraction has been performed. Uncoded records can be viewed after sortation.

#### **Deleting Records**

Records can be deleted in this view. This is useful for selectively deleting duplicates after the "Purge Duplicates" operation. To delete records individually, click it, then click the "Delete" button above the database. To delete multiple records, hold down the "Ctrl" key while selecting records, then press the "Delete" button on the screen.

You may also select an individual record by clicking on it. You can then manually check this record's address by clicking "Look-up".

# **Exporting the Database**

Choosing the Export Database option allows you to export your data to a database or text file.

IA iAddre	ss							_		$\times$
File Addr	ess Management	Move Update (NCOA	) Geocoding	Presort Pr	int Tools	Help				
File Addr Creat Creat Open Open Save J Merg Job W View Expor Exten Comp Prefer Copy	ess Management e Job e AddressMinerPRO e ODBC Job Job Recent Jobs lob e into Job /izard Database t Database t Database ded Export pany Information rences Canadian Data	Move Update (NCOA Ctrl+J D Job Ctrl+O Ctrl+S Ctrl+M > Ctrl+D Ctrl+E	) Geocoding d Count: 5656 b Name: aaaNe	Presort Pr	int Tools	Help	Copyright Flags (W) [Data 1] CA: 0 (S) [Data 2] CA: 0 (M) US Correction/DPV: 0 (M) US Lookup: 0 (P) US Label Lists: 0	hip Softwa 6/16/2017 7/14/2017 6/15/2017 5/15/2017 7/01/2017	re Ltd 200 Version 7 To 07/13 7 To 08/17 7 To 08/27 7 To 08/31 7 To 08/31	0-2016 4.0.0 3/2017 7/2017 3/2017 1/2017
Сору	US Data									
Exit										

Select "Export Database" from the File menu. The following screen will appear:

You may now select the content and format of the export database. The options are as follows:

🔄. Export Database		×
Export: Valid Addresses Corrected Addresses Uncorrectable Addresses Canadian Only Foreign Addresses Questionable Addresses Export in the Original Order	<ul> <li>Extra Control Fields</li> <li>Choose Fields</li> <li>Add Original Address Fields</li> <li>Include all other fields from the Audit Log</li> <li>Add Leading Zeros to Lis</li> <li>Add Correction Fields</li> <li>Add Status and Commer</li> <li>Add Address Componen</li> <li>Choose Export Fields</li> <li>Edit Fields</li> <li>Excel 97</li> </ul>	Ids pm original database stOrder nt ts
Export Database	Export <u>S</u> QL Updates	Cancel

#### • Valid Addresses:

All valid addresses from the original database are retained.

#### • Corrected Addresses:

All addresses corrected by iAddress<sup>™</sup> are retained.

#### • Uncorrectable:

Addresses iAddress<sup>™</sup> was unable to correct are retained.

#### • Questionable Addresses:

Addresses that are listed as Questionable by iAddress<sup>™</sup>

#### • Export in Original Order:

Keeps your database fields in the same order as the original file.

#### • Extra Control Fields:

Fields created by iAddress<sup>™</sup> during correction/validation and presortation.

#### • Add Original Address Fields:

Permits you to see the original state of your address fields as well as any corrections or changes.

#### • Include All Other Fields from Original Database:

Permits you to export additional fields contained in the original database (for example: customer numbers, phone numbers, etc.).

#### • Include Audit Log:

Allows you to export the audit log in order to track manual changes made to your database.

#### • Add Leading Zeros to List order:

Helps retain numeric formatting for dBase files.

#### • Add Correction Fields:

Permits you to see the corrections that have been suggested or applied to your database.

#### • Add Status and Comment:

Allows you to enter information about individual records.

#### • Add Address Components:

Adds fields of your address separated into its components (for example: street number, street name, street type, street direction, etc.)

#### • Choose Export Fields:

Allows you to choose specifically which fields you would like to export.

Once you have sorted your file, you can also export:

- Uncoded records
- Foreign records

After selecting your options, click Export Database. On the Save As screen, enter a location and filename for the new database. Click Save.

#### Preferences

There are default settings in iAddress<sup>™</sup> that relate to program preferences, marking of bundles and autosave features. To change the defaults, select "Preferences" from the File menu.

File	Address Management Move	Update Geo	ocoding	Presort Print Tools Help	
	Create Job	Ctrl+J	d Count	5656	Copyright Flagship Software Ltd 2000-2016
	Create AddressMinerPRO Job		h Name		Version 4.0.0 1 (س) (D جاء 11 CA: 06/16/2017 To 07/13/2017
	Create ODBC Job			- Jaaanew_demoList	(%) [Data 2] CA: 07/14/2017 To 08/17/2017 (S) [Data 2] CA: 07/14/2017 To 08/17/2017
	Open Job	Ctrl+0			(M) US Correction/DPV: 06/15/2017 To 09/28/2017
	Open Recent Jobs				(M) US Lookup: 05/15/2017 To 08/31/2017
	Save Job	Ctrl+S			(P) US Label Lists: 06/01/2017 To 07/31/2017
	Merge into Job	Ctrl+M			
	Job Wizard	>	ing for 8	0 minutes	<u>^</u>
	View Database	Ctrl+D			
	Export Database	Ctrl+E			
	Extended Export				
	Company Information				
	Preferences				
	Copy Canadian Data	>			
	Copy US Data				
	Exit				

#### Settings

The settings tab allows you to choose your default preferences related to the iAddress<sup>™</sup> program.

IA Settings		×			
Settings Data Paths CA Sort US So	rt				
C English C French	🔲 Enable Audit Trailing				
Specify NCOA server					
NCOA (SSL) Secure Transfer	OFF 💌				
Check for Updates on Startup	ON 💌				
Auto Save	ON 💌				
Auto Save AutoSave directory size: 211 MB	Go to AutoSaves				
Delete auto save files after:	90 days.				
Work Folder C Default Location C Specify Location C:\Users\bisma\AppData\Local\iAddress\work\					
Export Settings Import Setti	ings <u>S</u> ave <u>C</u> a	ancel			

#### Language

Use this button to switch between English and French displays in iAddress<sup>™</sup>. Please note that not all USPS terms have French equivalents and will be displayed in English.

#### **Enable Audit Trailing**

This feature will track manual changes you have made to your database. For example, the Audit Log will show record deletions, additions, and any changes you made through the Address Lookup screen.

#### NCOA (SSL) Secure Transfer

Enable the NCOA (SSL) Secure Transfer to have your information encrypted when using the NCOA/CMA feature.

#### **Check for Updates on Startup**

If you have an Internet connection on this computer and would like iAddress<sup>™</sup> to automatically check the update server for any program updates, leave this option set to "ON".

#### AutoSave

Your job file is automatically saved after each step in the correction/validation and sortation process. Should you unintentionally exit iAddress<sup>™</sup> without saving, you can recover your job by clicking the "Go to AutoSaves" button. AutoSaves are named by the date and time of their creation.

To prevent auto saves, turn this option to "OFF".

#### Important!

You should periodically delete your old auto saved files to conserve hard drive space.

#### **Data Paths**

The Data Paths tab allows you to choose your default paths related to the iAddress<sup>™</sup> program.

IA Settings			×
Settings Data Paths (	A Sort US Sort		
Default Paths	R I	Bemember Last Pat	h
			Browse
Export and Save Folder	▼ F	– Remember Last Pat	h
			Browse
Export for Printing Folder	🔽 F	Remember Last Pat	h
			Browse
Postal Data Location			
C:\ProgramData\iAddres	s\Data		Browse
Current Data			
C:\ProgramData\iAddres	s\Data\Current		<u>B</u> rowse
Future Data C:\ProgramData\iAddres	s\Data\Future		<u>B</u> rowse
US Data C:\ProgramData\iAddres	s\Data\us		Browse
DBF Code Page			
OEM (DOS) (Cod	e Page 437)		
C ANSI (Windows)	(Code Page 1252)		
Export Settings	Import Settings	<u>S</u> ave	<u>C</u> ancel

#### **Default Paths**

You may set the default folder that iAddress<sup>™</sup> uses when it:

- Import files to create jobs
- Exports and saves
- Export for Printing

You may either set these manually to a preferred folder, or check the 'Remember Last Path' checkbox to allow iAddress<sup>™</sup> to default to the last path used.

#### **Postal Data Location**

Lists the paths where iAddress<sup>™</sup> stores its data files.

#### **DBF Code Page**

You can set the default handling of dBase files. Older versions of dBase use OEM codepage to store accented characters, while newer versions use ANSI codepage to store accented characters. An incorrect setting may result in accented characters being improperly displayed.

# **CA Sort Preferences**

The CA Sort tab allows you to choose your default preferences related to the Canadian Sort.

IA Settings				×		
Settings Data Paths CA Sort US Sort						
Bundle Breaks Break string on	First	➡ piece bundl	of the e/container/pa	allet		
Bundle string	×					
Container string Pallet string	Container/Bun column add bundle					
City string	P Bundle Breaks in seperate column					
OEL Number of stars	2	OEL stars o	n front and en	а 🗖		
Text Report Margin	0					
Container Label Left Margin Offset	0	Top Marg	jin Offset	0		
Pallet/Monotainer Def	aults		Pallets	Monotainer		
	Minimu	um Lettertainers	18	18		
	Maximu	um Lettertainers	48	36		
	Minimum	Letterflatainers	24	24		
	Maximum	Letterflatainers	64	40		
	Min	imum Flat Tubs	12	12		
	Max	imum Flat Tubs	32	24		
	Minimum Height (Brick Pile) 500 820			820 mm		
	Maximum Height (Brick Pile) 1300			990 mm		
Maximum Weight 875 803 Kg						
Export Settings	Impor	t Settings	<u>S</u> ave	Cancel		

#### **Bundle Breaks**

• During the sortation process, you may choose to indicate the first, last, or first and last piece of each bundle, container, or pallet. The default characters provided indicate the breaks; if you would prefer to change them simply enter a new

character for each type of container. If you do not wish to have the breaks indicated uncheck the "Bag/Bun column add bundle break" checkbox.

#### OEL

• The Optional Endorsement Line replaces the bundle labels by printing this information directly on the address labels on the first line above the address.

#### Important!

The OEL is created automatically during the sort but it is an optional feature. You
must manually select the OEL field in Windows Print or DOS Print in order for it to
be printed on the address labels. If you export your addresses for printing, you
must position the OEL field on your labels. If you prefer not to use the OEL, bundle
labels can still be used.

#### **Pallet/Monotainer Defaults:**

• If you use pallets or monotainers for your sorted jobs, you can enter your preferred quantities and dimensions here. This will replace the Canada Post maximum and minimum amounts with your selected quantities and dimensions.

# **US Sort Preferences**

The US Sort tab allows you to choose your default preferences related to the US Sort.

IA Settings	×				
Settings Data Paths CA Sort US Sort					
<ul> <li>Number of Stars in front of the Optional Endorsement Line</li> <li>Include **AUTO at the beginning of automation OEL lines</li> <li>Use Code 128 Barcodes for Tray Labels</li> </ul>					
Use Code 126 barcode to Tray Labels					
<ul> <li>Save the IMB Barcode as an ENCODED field</li> <li>Container / Bundle Markings</li> <li>Break string on Last piece of the bundle/container/pallet</li> <li>Mark Indicators</li> <li>Include Bundle Break Mark</li> <li>Include Container Break Mark</li> <li>Include Pallet Break Mark</li> </ul>					
Optional Endorsement Line on Bundles					
Place on the First Piece of every Bundle					
C Place on the Last Piece of every Bundle					
C Place on the First and the Last Piece of every Bundle					
C Place on every Piece in the Bundle					
Export Settings <u>S</u> ave <u>C</u> ano	cel				

#### Number of Stars in front of the Optional Endorsement Line

You can set the number of stars in front of the optional endorsement line.

#### Include **\*\***AUTO at the beginning of automation OEL lines.

This option lets you choose whether to include \*\*AUTO at the beginning of automation OEL lines.

#### Use Code 128 Barcodes for Tray Labels

There are 2 available barcodes for tray labels, by default it is an interleaved 2 by 5 barcode but if the 128C tray labels and GS1-128 Pallet labels are preferred this option can be selected.

#### **Container / Bundle Markings**

#### **Break String On:**

• Choose to place the marks on the first, last or first & last of the piece within the grouping to which it belongs.

#### **Bundle/Container/Pallet Markings**

• The markings to be used, traditionally \* for bundles, \* for containers (trays/sacks) and P for pallets. On a pallet, tray and bundle change the mark would appear P\*\*.

#### **Optional Endorsement Line on Bundle Sorts**

You can choose one of the following preferences for the optional endorsement line on bundle sorts:

- Place on the first piece of every bundle
- Place on the last piece of every bundle
- Place on the first and last piece of every bundle
- Place on every piece in the bundle

#### **Extended Export**

As you may have recently noticed, there's a new export option available for Canadian jobs in iAddress called *Extended Export* 



This new export screen is designed to give you full control over the export of your data from iAddress in a clear and intuitive fashion.



As seen above, there are 4 main sections on the Extended Export screen: Record Types, Fields, Order and Export Options.

#### **Record Types**

Extended Export		×
Select Record Types         Select the record types to include in the export         Correction Status         ✓ Valid Addresses         ✓ Uncorrected Addresses         ✓ Uncorrected Addresses         ✓ Questionable Addresses         ✓ Questionable Addresses         ✓ Individual         ✓ Family         ✓ Business         ✓ Unmatcheables         ✓ Nonmatches         ✓ Unmatcheables         ✓ Sottation         ✓ Sottation         ✓ Sottation         ✓ Sottation         ✓ Canadian Only	Select Fields Select fields to be included in the export. Use the shortcut buttons below to add fields quickly ORIGFNAM ORIGADD ORIGA	Order            • Original Order         • Reverse Order         • Sott Order [Listorder]         • Reverse Within Bundles         • Reverse Sott Order         • Unsorted records at end         • Unsorted records at end         • Export Options         • Include the Audit Log         Export Type         • Fixed Length         • Filename         C:\Demo\DemoExport.txt         • Browse         • Errowse         • C:\Demo\DemoExport.txt         • Browse         • Errowse         • State State State         • Errowse         • Errowse
Canadian Unly	All Other Original Fields	Export Close

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The record types section allows you to select exactly what type of records you want to include in the exported file. These options are completely inclusive, if it is checked, that type of record will be exported and if it is unchecked it will not be. For example, if you wanted to export only the valid and corrected addresses, you would leave checked *Valid Addresses* and *Corrected Addresses* and leave unchecked *Uncorrectable Addresses* and *Foreign Addresses*. Questionable is a status modifier on (A valid or corrected address may be questionable – this applies to rural addresses where the less strict SERP Rural rules apply).

Options that are unavailable will be greyed out and unable to be selected. These are options which don't apply because the requisite process hasn't been run – for example, correction status will be disabled if correction hasn't been run on the job. Above, everything but Deceased list processing has been done, thus everything is available except for Deceased Records.

#### **Fields**



The fields section allows you to select which fields (or columns if you prefer) to include in the export and in which order they will be listed. The 2 arrows in the center allow you to assign columns from the available fields on the left to the exported field list on the right. Selecting a field or multiple fields and using the arrow buttons underneath the exported field list allows you to reorder the fields.

Underneath the two lists are convenience buttons to allow you to quickly assign relevant fields. For example, you can add all the other fields that were in the input file by clicking *All Other Original Fields* and you can add all the original address fields by clicking *Original Address Fields*.

#### Order



The order section allows you to set which order the exported file will be in.

# **Export Options**



The export options section primarily is where you will select the type of file to export to and the name/location to export it to. For some file formats there will be additional options here as well.

#### Support

If you encounter any problems or have any questions please do not hesitate to contact our support department by sending an email to <u>support@flagshipsoftware.com</u> or calling us at 1-866-672-0007 Extension 3.

# Merging Databases into a Single Job

iAddress<sup>™</sup> has a feature that allows you to combine two or more databases into a single mailing job. To merge databases, you must open the first database using the Create Job or Create ODBC Job command from the main menu and select the appropriate fields. When this has been completed for the first database, you can start adding files. Merged files do not need to be the same file type (eg. Access or Excel) nor do they need to have the same layout. From the File menu, select "Merge into Job". You must set up every name field for a merge job since the field names in your input files may be different. **Video**.

#### The Merge Databases function must be performed prior to Validation.

 Once you have selected Merge Databases, the Open window will appear. Select the database you wish to merge and click "Open". Follow the same steps as outlined for Create Job/Create ODBC Job for selecting the table and assigning fields. Once this is complete, you can add additional files or proceed with correction/validation and/or sortation.

#### **Merging Additional Files**

- To add additional databases, simply select Merge Databases again from the main menu and follow the above steps.
- iAddress<sup>™</sup> numbers the imported files 1, 2, 3, etc. If you wish to retain this field (MergeFile) on export, you must select Extra Control Fields on the Export
- Database screen.

#### **Opening a Saved Job**

IA i	IA iAddress — 🗆 🗙								
File	Address Management	Move Update (NCOA)	Geod	oding	Presort	Print	Tools	Help	
	Create Job	Ctrl+J	d Count:	5656					Copyright Flagship Software Ltd 2000-2016
	Create AddressMinerPR	O Job							Version 4.0.0
	Create ODBC Job		o Name:	aaaNe	w_demoLis	:t			(W) [Data 1] CA: 06/16/2017 16 07/13/2017 (S) [Data 2] CA: 07/14/2017 To 08/17/2017
	Open Job	Ctrl+O							(M) US Correction/DPV: 06/15/2017 To 09/28/2017
	Open Recent Jobs	-0							(M) US Lookup: 05/15/2017 To 08/31/2017
	Save Job	Ctrl+S							(P) US Label Lists: 07/01/2017 To 08/31/2017
	Merge into Job	Ctrl+M							
	Job Wizard	>							^
	View Database	Ctrl+D							
	Export Database	Ctrl+E							
	Extended Export								
	Company Information								
	Preferences								
	Copy Canadian Data	>							
	Copy US Data								
	Exit								

Select "Open Job" from the File menu. When the file list appears, select the appropriate. pjf file and click "OK".



# Job Wizard

The Job Wizard steps you through the process of creating a job. To use the Job Wizard, select "Job Wizard" from the File menu, and then select either "Job Wizard Canada" or "Job Wizard United States".

IA	iAddress				– 🗆 X
File	Address Management Move U	pdate Geo	coding Presort Print To	ols Help	
	Create Job	Ctrl+J			Copyright Flagship Software Ltd 2000-2016
	Create AddressMinerPRO Job		h Name:		Version 4.0.0
	Create ODBC Job				(S) [Data 2] CA: 07/14/2017 To 08/17/2017 (S) [Data 2] CA: 07/14/2017 To 08/17/2017
	Open Job	Ctrl+0			(M) US Correction/DPV: 06/15/2017 To 09/28/2017
	Open Recent Jobs				(M) US Lookup: 05/15/2017 To 08/31/2017
	Save Job	Ctrl+S			(P) US Label Lists: 06/01/2017 To 07/31/2017
	Merge into Job	Ctrl+M			
	Job Wizard	>	Job Wizard Canada		^
	View Database	Ctrl+D	Job Wizard United Stat	tes	
	Export Database	Ctrl+E	Run Existing Job		
	Extended Export				
	Company Information				
	Preferences				
	Copy Canadian Data	>			
	Copy US Data				
	Exit				
		_			

The Job Wizard steps you through the process of creating a job. To use the Job Wizard, select "Job Wizard" from the File menu, and then select either "Job Wizard Canada" or "Job Wizard United States".

The following screen appears:

Job Wizard - Start					
Welcome to the iAddress Job Wizard. The wizard steps you through the process of creating a job for correction/validation and/or sortation. Press Next to continue or press Open to run a previous Job Wizard job					
<u>N</u> ext > Cancel					

Follow the on-screen instructions to progress through the Wizard. Once the Wizard reaches the final step, press the Finish button to run the job.
Here are step by step screenshots to help guide you through the wizard.

Job	Wizard - Step 1 of 7
Г	Type the location of the database you wish to use for this job or use the browse button to search for the file <u>Browse</u>
	Next > Cancel

Job Wizard - Step 2 of 7
Enter a name for this job:
2017-07-11_10-58-10
Enter the mailing date for this job:
7 /11/2017 🗸
Mail on Behalf
Lustomer Name
Seed Records:
< <u>B</u> ack <u>N</u> ext > Cancel

Job Wizard					
	50	50	<b>F</b> 4	C.C.	7
<u> F1</u>	F2	F3	F4	<u> </u>	
FIRST NAM	LAST NAME	COMPANY I	ADDRESS *	AE	ω.
TIMOTHY E	SIMON		POPLAR DR		[·-
CECILE	AUDETTE		ANCETRES		
LINDSAY J	THOMAS		IBERRY RD		
LEONA	GLENNON		ST APT 304		
COUDTURY	0.000		D DD DD 4	۲×	
<				>	
	le tha firet r	ow a hoade	ar row?		
			5110771		
	(	• Yes			
	(	🔿 No			
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	< <u>B</u> ack	<u>N</u> ext	>Ca	incel	

-						
J	ob Wizard					
	F1	F2	F3	F4	FE 🔥	1
	FIRST NAM	LAST NAME	COMPANY I	ADDRESS 1	AE	
	TIMOTHY E	SIMON		<sup>2</sup> OPLAR DR		r.
	CECILE	AUDETTE		ANCETRES		
	LINDSAY J	THOMAS		IBERRY RD		
	LEONA	GLENNON		ST APT 304		
	COUDTNES	0.2000		N NN NN 4	Ţ.	
	<b>`</b>					
	Select	the fields w	hich contaiı	n the Addre	ss	
		inf	formation			
	Address 1		ADDRE	SS 1	-	1
			1.12.2.1.2			1
	Address 2 (d	optional)	ADDRE	SS 2	-	1
			1		_	
Γ						
		< <u>B</u> ack	Next	Ca	incel	
						_

Job Wizard					
F1	F2	F3	F4	F5 🔺	1
FIRST NAM	LAST NAME	COMPANY I	ADDRESS 1	AE	
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CECILE	AUDETTE		ANCETRES		
LINDSAY J	THOMAS		IBERRY RD		
LEONA	GLENNON		ST APT 304		
COUDTNES	ec		D DD DD 4	É.	
-				-	1
City	and Posta	I / ZIP inform	mation	vince,	1
City		ICITY		•	
Province		PROVIN	1CE	•	
Postal / ZIP	,	POSTA	L CODE	-	
	< <u>B</u> ack	<u>N</u> ext	Ca	incel	
lob Wizard					

Job Wizard					
F1	F2	F3	F4	FE 🔺	1
FIRST NAM	LAST NAME	COMPANY I	ADDRESS 1	AE	
TIMOTHY E	SIMON		POPLAR DR		٣.
CECILE	AUDETTE		ANCETRES		
LINDSAY J	THOMAS		IBERRY RD		
LEONA	GLENNON		ST APT 304		
COUDTURS	100000			5 °	
					1
Selec	t the fields '	which conte	ain the nam	е	
inforn	nation (opti	onal, press	next to skip	o)	
First Name (optional)			ſ		
		1			l
Last Name	(optional)			-	1
Name (optic	inal)			-	[
		1			
Name2 (Optional)					
,					
Name3 (Op	tional)			-	
	< <u>B</u> ack	Next	> Ca	incel	
					_

Job Wizard					
[E1	52	E2	E4	LEE A	
FIRST NAM	LAST NAME				
	SIMON				
				-s	
LINDSAY.L	THOMAS		IBEBBY F	20	
LEONA	GLENNON		ST APT 3	04	
COUDTURS	0.224101			÷÷ ⊻	
<				<u> </u>	
Selecta	lanquaqe fi	eld (option	al, press	next to	
		skip):			
Language(d	optional)			•	
English Syn	nbol				
E	L -1				
French Sym	IDOI				
			_		
	< <u>B</u> ack	<u>N</u> ext	> )	Cancel	
	·				
🖏 Job Wiz	ard	_		$\times$	
Sele	ect your job	processing	g options		
✓ Lorrection ► NCOA (Depende Depending) 2142470540)					
DNM Onlu					
1 400	oodiing				
Sortation					
Sort only if 95% Valid					

Job Wizard
Select correction options
Machineable - Formats to Machineable standards
Use Accents - Adds accents to French names
Western Style - Formats to Western Style
Update LVR - Updates Large Volume Receivers
Update Valids - Formats addresses deemed valid
Minimum SERP Rural Standards
Place a Space in the Postal Lode (UM)
Use imported city name
<u>Back</u> <u>Next</u> Lancel
Select the way you want your addresses to be formatted:
Casing O Upper/Lower Case i.e. 123 Flagship Road
OR
All Ugper Lase     I.e. 123 FLAGSHIP RUAU
Shorten
Shorten Address i.e Street -> St.
Full Street Type i.e. St> Street
- Nurzher of Lines
Prefer I wo Line Output
OR C Ence One Line Output
OR
© No Preference
< Back Next > Cancel

Job Wizard
Select the method to determine the language of the addresses
<ul> <li>Automatically determine the language of an address and convert</li> </ul>
<ul> <li>Convert all addresses to <u>English</u></li> </ul>
Convert all addresses to <u>French</u>
$\odot$ Make all Quebec addresses French, all others English
○ By a Language Indicator field
English
< <u>B</u> ack <u>N</u> ext > Cancel
Job Wizard
Select report printing options.
Reports
PRINT(x1) & SAVE ALL   Options
Prefix files with (optional)

Select	the mailing date of the sortation.			
	ine Dete E 100 1001 7			
You must deposit	t your mail on or after 7/14/2017.			
Template	New Template	Delete		
Customer	Flagship Software LTD.	•		
Client Info.				
Tax Rate	13 Reference			
Addresses Includ	e 🔽 Betired Posta	l Code		
Questionable	Uncoded as r	residue		
🔽 Split large bu	ndles (S/L > 100 mm and 0/S > 20	00 mm)		
🗖 Do Phantom	Mailing Advance	ced Options		
< <u>B</u> ack	<u>N</u> ext >	Cancel		
< <u>B</u> ack	<u>N</u> ext >	Cancel		
<u>Back</u>	<u>N</u> ext >	Cancel		
< <u>B</u> ack Job Wizard	Next >	Cancel		
< <u>B</u> ack Job Wizard	Next >	Cancel		
< <u>B</u> ack Job Wizard	Next >	Cancel		
< <u>B</u> ack Job Wizard	Next >	Cancel		
✓ <u>Back</u> Job Wizard       Se	Next >	Cancel		
<ul> <li>&lt; <u>Back</u></li> <li>Job Wizard</li> <li>Se</li> <li>✓ <u>Machineabl</u></li> <li>□ Use <u>Accent</u></li> </ul>	Next >	Cancel		
<ul> <li>&lt; <u>Back</u></li> <li>Job Wizard</li> <li>Se</li> <li>✓ <u>Machineabl</u></li> <li>Use Accent</li> <li>✓ Western Str</li> </ul>	Next >	Cancel		
< Back Job Wizard Se ✓ Machineabl ✓ Use Accent ✓ Western Str ✓ Update LVF	Next >	ards		
< Back Job Wizard          Job Wizard         Image: Select state         Image: Select state	Next >	ards ers alid		
<ul> <li>&lt; Back</li> <li>Job Wizard</li> <li>Se</li> <li>✓ Machineabl</li> <li>Use Accent</li> <li>✓ Western Str</li> <li>Update LVF</li> <li>✓ Update Vel</li> <li>✓ Minimum SE</li> </ul>	Next > elect correction options le - Formats to Machineable standa ts - Adds accents to French names yle - Formats to Western Style R - Updates Large Volume Receive ids - Formats addresses deemed va ERP Rural Standards	ards		
<ul> <li>&lt; Back</li> <li>Job Wizard</li> <li>Se</li> <li>✓ Machineabl</li> <li>Use Accent</li> <li>✓ Western Str</li> <li>✓ Update LVF</li> <li>✓ Update VF</li> <li>✓ Update VF</li> <li>✓ Place a Spate</li> </ul>	Next > elect correction options elect correction options ele - Formats to Machineable stands ts - Adds accents to French names yle - Formats to Western Style R - Updates Large Volume Receive ids - Formats addresses deemed vo ERP Rural Standards ace In the Postal Code (OM)	ards alid		

date⊻alids - Formats addresses deemed valid
imum SERP Rural Standards
ce a <u>S</u> pace In the Postal Code (OM)
nported city name

Cancel

 $\underline{N}ext >$ 

< <u>B</u>ack

Ę	3, Job Wizard - Other Options X
	Other Options
	Remove Duplicates
	🥅 Filter Mailing
	🗖 Genderize
	Field Formatting (Casing,etc)
	🗖 Demographic
	Export
	Kext >         Cancel
_	
Jo	ob Wizard - Save Job
	If you want iAddress to automatically save your job after correction and/or sortation, select the name of the job file name here, otherwise leave blank to skip saving.
	Save Job After Correction
	<u>B</u> rowse

Save Compl	lete Job Title		
			Browse
	< <u>B</u> ack	<u>N</u> ext >	Cancel

Job	Wizard - Completed!
	The Job Wizard is now completed! Press Finish to run your job now or press Save to save your settings to run your job at another time
	< <u>B</u> ack <u>Continue</u> <u>S</u> ave <u>Finish</u>

• select this option to use the first row as column headers.

# AddressMinerPRO

AddressMinerPRO is a utility designed to help manage disorganized data files. AddressMinerPRO can extract address data from files where there is no order or discernible structure, and where address data is stored in single fields. Previously, in order to work with a file like this, you would have had to manually edit the file to properly order the fields. This can be very difficult and tedious with files that contain thousands, or even hundreds of thousands of records.

Using AddressMinerPRO is quite simple; it integrates directly into iAddress<sup>™</sup> and guides you through the process of importing your data into iAddress<sup>™</sup>. A few quick clicks and AddressMinerPRO will import your data directly into iAddress<sup>™</sup>.

### Starting AddressMinerPRO

• To get started with AddressMinerPRO, simply click on "Create Address Miner Job" in the "File" menu. This launches the AddressMinerPRO wizard, which will guide you through the process of importing your data file.

### Selecting Your File

After you have clicked on the menu item, iAddress<sup>™</sup> will prompt you for a data file. This is a standard file prompt, so just select your input file and click "OK". After this, you will be greeted with the AddressMinerPRO start screen, where you can select where you want the "rejects" (records which AddressMinerPRO could not parse) to be exported. The default is <filename>.rej.<fileextension> in the same folder as your input file. This screen will also give an option for label files. (This will be covered later in this document.)

iA	ddress									– – ×
2	Address Management	Move Upd	ate	Geoc	oding	Presort	Print	Tools	Help	
C	Create Job		Ctrl+	J	1					Copyright Flagship Software Ltd 2000-20
C	Create AddressMinerPRC	J ob	2		h Mama					Version 4.0.1 10 مەر 11 مەر 11 مەر 12 مەر 12 مەر 12 مەر 12 مەر
C	Create ODBC Job		.0		UNAME	·				(S) [Data 2] CA: 07/14/2017 To 08/17/20
C	Open Job		Ctrl+(	0						(M) US Correction/DPV: 06/15/2017 To 09/28/20
C	Open Recent Jobs									(M) US Lookup: 05/15/2017 To 08/31/20
S	ave Job		Ctrl+	S						(P) US Label Lists: 07/01/2017 To 08/31/20
Ν	Verge into Job		Ctrl+N	N						
J	ob Wizard			>						
V	/iew Database		Ctrl+l	D						
E	xport Database		Ctrl+	E						
E	xtended Export									
C	Company Information									
P	Preferences									
C	Copy Canadian Data			>						
C	Copy US Data									
F	xit									

AddressMinerPRO	
Input File:	
C:\Program Files\iAddress\test\CSV.txt	Browse
Output File (for unparsed records):	
C:\Program Files\iAddress\test\CSV.rej.txt	Browse
Label File	Cancel

## Selecting Text Format (Text files only)

• This screen is similar to the screen you would see in iAddress<sup>™</sup> to select the format of your text file. Like the screen in iAddress<sup>™</sup>, it will usually select the correct format automatically. However, unlike in iAddress<sup>™</sup>, you do not specify whether it has a header row on this screen - that comes on the next screen.

Select Text Format		×
Preview:		
"John" "Smith"	"650 Amberley Ave"	"Londo 🔺
"John" "Smith"	"1515 Place Erin"	"Dorva
"John" "Smith"	"1515 Place Erin"	"Dorva
"John" "Smith"	"56 Victor St"	"Londo
"John" "Smith"	"56 Victor St"	"Londo
"John" "Smith"	"62 Springbank Dr"	"Londo
"John" "Smith"	"101 Mark St"	"London"
"John" "Smith"	"679 Donegal Dr"	"Londo 🖵
•		··· ·
	Select the format of the text file:	
C Fixed Length fields	C Specify Delimiter	
Tab Delimited	C Comma Separated Va	lues
		ontinue <u>}</u> ancel

### **Data Preview**

 The data preview screen offers a brief preview of your data (it will not show all of the records in your file, only the first 50 or so). On this screen, you can select whether or not there is a header row and it will update the preview, changing the column names. You can also optionally specify fields for AddressMinerPRO to ignore. For example, in the image below, we know that the first 2 fields are name fields only and that no address data exists in these fields. Therefore, we tell AddressMinerPRO to ignore them in processing, although they will still be imported as separate columns. We also have a few fields after all the addressing information that includes identifiers and miscellaneous information that is not address related.

AddressMinerPRO File Preview									
	Preview: usTest.tab								
	Field 1	Field 2	Field 3	•					
	2392 24TH STREET APARTMENT		ASTORIA NY 11105						
	99 GREEN FIELD		MILL VALLEY CA 94941						
	695 NE WABASH AVE		RANTOIL IL						
	290 58TH ST		SEATTLE WA						
	23 CALLE JULIA RUIZ URB OLIVE		SAN SEBASTIAN PR 006						
	CALLE ATENAS NO 200		ARECIBO PR 00612						
	566E 2850N		OGDEN UT 84414						
	TIOGA LAND		WELLSBORO PA 16901	-					
Has Header 0 Fields before addresses									
	0 ▼ Fields after addresses OK Cancel								

### Complete

After you click ok on the File Preview screen, AddressMinerPRO will process the file and import it into iAddress<sup>™</sup>. Any records that were unable to be parsed will be exported to the separate file specified earlier, however, the original structure of the input file is maintained in this export file. From this point, iAddress<sup>™</sup> will function exactly the same as if you had created a job normally and mapped your fields. If you need to map name fields, you will need to export this data and create a job using that export file.

### Label Formatted Files

• On the start screen if you check off "Label File", AddressMinerPRO will then convert a label formatted text file into a proper data format and import it into iAddress<sup>™</sup>.



#### **Select Type of Label Format**

 On the next screen you simply specify in what format your label formatted text file is. If the labels are separated by blank lines, then you would select "Line Feed". If they are separated by a form feed, then you select "Form Feed". If your labels are fixed line (for example, every label is 5 lines long) you would select "Fixed Line" and specify the number of lines. When you click continue, AddressMinerPRO will process your file and import the results into iAddress™. NOTE: There is no preview screen since AddressMinerPRO will automatically detect the data after converting the label to a readable record.

🖺 Label File Settings						
Label Format						
Line Feed Separated						
C Form Feed Separated						
C Fixed Line Lines Per Label:						
Run Cancel						

# Creating an ODBC Job

• Creating an ODBC Job allows you to use the ODBC connection. Select "Create ODBC Job" from the file menu. You will be prompted for your ODBC (Open Database Connection) connection. After you have selected your ODBC connection, the steps are the same as for "Create Job".

IA	iAddress								– 🗆 X
File	Address Management	Move Update	Geod	coding	Presort	Print	Tools	Help	
	Create Job	Ct	rl+J	1					Copyright Flagship Software Ltd 2000-2016
	Create AddressMinerPR	O Job		l					Version 4.0.0
	Create ODBC Job	Ν		D Name					(W) [Data 1] CA: 06/16/2017 To 07/13/2017 (S) [Data 2] CA: 07/14/2017 To 08/17/2017
	Open Job	<sup>VS</sup> Ctr	+0	L					(M) US Correction/DPV: 06/15/2017 To 09/28/2017
	Open Recent Jobs			L					(M) US Lookup: 05/15/2017 To 08/31/2017
	Save Job	Ct	I+S	L					(P) US Label Lists: 07/01/2017 To 08/31/2017
	Merge into Job	Ctrl	+M	L					
	Job Wizard		>						^
	View Database	Ctr	+D						
	Export Database	Ct	I+E						
	Extended Export								
	Company Information								
	Preferences								
	Copy Canadian Data		>						
	Copy US Data								
	Exit								

# Saving a Job

Save Job saves the current state of your database and reports after validation/correction or presort has been performed. "Save Job" can be performed at any point in the correction/validation or presortation process.

IA	iAddress		-		×
File	Address Management	Move Update (NCOA	) Geocoding Presort Print Tools Help		
	Create Job Create AddressMinerPR Create ODBC Job	Ctrl+J O Job	d Count: 5656 Copyright Flagship Softw b Name: aaaNew_demoList (W) [Data 1] CA: 06/16/201 (S) [Data 2] CA: 07/14/201	are Ltd 2000 Version 4 17 To 07/13 17 To 08/17	0-2016 4.0.0 1/2017 1/2017
	Open Job Open Recent Jobs	Ctrl+O	(M) US Correction/DPV: 06/15/20 (M) US Lookup: 05/15/20	17 To 09/28 17 To 08/31	/2017 /2017
	Save Job Merge into Job	Ctrl+S Ctrl+M	(P) US Label Lists: 07/01/20	.7 10 08731	/2017
	Job Wizard	>			^
	View Database	Ctrl+D			
	Export Database Extended Export Company Information	Ctrl+E			
	Preferences				
	Copy Canadian Data	>			
	Copy US Data				
	Exit				

The window below opens and specifies that the file will be in the directory you were in the last time you saved a job. Select the directory you wish your job to be saved in.

Save As		×
← → ~ ↑ <mark> </mark>	« Downloads > Test-Ref-Files v さ Search Te	st-Ref-Files 🔎
Organize 👻 New	w folder	≣≡ ▾ ?
Manual Edits	Name     Date modified	Туре
My Screen Sho	ots 🤗 aaaNew_demoList 6/12/2017 10:1	4 AM PJF File
Screenshots	Sune Deceased Uncorrectable 7/5/2017 4:20	PM PJF File
Test-Ref-Files		
<ul> <li>OneDrive</li> <li>Documents</li> <li>Email attachm</li> <li>Pictures</li> <li>This PC</li> </ul>	ner	
Network	✓ <	>
File name:	aaaNew_demoList	~
Save as type:	Job File (*.pjf)	~ ~
∧ Hide Folders	Sav	e Cancel

After selecting the appropriate directory, type a descriptive name for your job and click "Save".

# **Creating a Job**

To start a new job, select "Create Job" from the File menu.

IA iAddress							– 🗆 X
File Address Management Mov	<b>e Update</b> Geo	coding	Presort	Print	Tools	Help	
Create Job	Ctrl+J						Copyright Flagship Software Ltd 2000-2016
Create AddressMinerPRO Job		h Name:					Version 4.0.0 [Dista 11 CA: 07/14/2017 To 09/17/2017
Create ODBC Job		D Name.					(M) [Data 2] CA: 08/18/2017 To 09/14/2017
Open Job	Ctrl+0						(M) US Correction/DPV: 07/15/2017 To 10/28/2017
Open Recent Jobs							(M) US Lookup: 06/15/2017 To 09/30/2017
Save Job	Ctrl+S						(P) US Label Lists: 07/01/2017 To 08/31/2017
Merge into Job	Ctrl+M						
Job Wizard	>						<u>^</u>
View Database	Ctrl+D						
Export Database	Ctrl+E						
Extended Export							
Company Information							
Preferences							
Copy Canadian Data	>						
Copy US Data							
Exit							

Select the database and click "Open" or double click the database. Once your database has opened, a screen will appear to continue with the next steps.

# **Multiple Tables in a Database**

If multiple tables exist in the database, a window will appear listing the tables and the number of records in each table. Select the table you want to use, then double click or click "Done".

If you need to import multiple tables from the same spreadsheet, you will have to repeat this process using the Merge into Job feature for each table.

# **Text Files**

If you have selected a text database, the following window will appear:

IA Select Text Format			×
Preview:			
John	Smith		<b></b>
John	Smith		
S	elect the format of the text f	ile:	
Fixed Length fields	C Specify Delimiter		;
C Tab Delimited	🔿 Comma Separateo	d Values	
First Row is a Header Ro	W		
🔽 Load all columns as text	columns	Continue ≥	<u>C</u> ancel

Choose the type of text file, select whether your first row is a header row and if you would like to load all columns as text columns (recommended) and click continue. If you have chosen a fixed length file, a screen will appear showing you which fields iAddress<sup>™</sup> has autodetected. You can make changes to your file, and load or save templates. When you are satisfied with your changes, click "Create Job".

John John John John John			Smi Smi Smi Smi Smi Smi	.xx th th th th th	
John	194		Smi	th +h	Ð
		Start	End	Length	Field:
	Field 1	1	30	30	Starts:
	Field 2	31	61	31	Ender F
	Field 3	62	126	65	Ends.
	Field 4	127	156	30	Length:
	Field 5	157	161	5	and the second s
	Field 5	162	171	10	Create new field at.

# **Selecting Address Fields**

iAddress<sup>™</sup> will automatically attempt to match the database fields to the appropriate iAddress<sup>™</sup> fields. You can override these entries and select fields iAddress<sup>™</sup> was unable to locate, as follows:

From the drop, down list under each iAddress<sup>™</sup> field, scroll and select the database field that corresponds to the information required by the program.

IA Select Address	×	ſ	IA Select Address	×
Database 1 FirstName	First Name (optional)		Database 1 FirstName	First Name (optional)
2 LastName 3 Address1 4 Address2 5 City 6 State 7 ZipCode	Name Fields (optional)     Fim Name       Image: State		2 LasIName 3 Address1 4 Address2 5 Cit/Name 6 Province 7 PostalCode 8 Language	Name Fields (optional)     Language Indicator (optional)       Image: State of the stat
	City State Zip/Zip+4 City	I		City Province Postal / ZIP CityName   Province  Postal Code   Postal Code
	Zop+4 Delivery Font Carrier Houte ELUT Walk HestBus     County Code Firm Count     One Field: City State Zp/Zip+4)			Weight g Thickness mm 🗨
•	One Field: City State     Expand Address Fields     Seed Records:		•	One Field: City Province     Expand Address Fields     Seed Records:
Template           New Template           Save         Delete	✓         US or Canada         CA aprx 0½         Files Character Set         C Windows (Ansi)           ✓         C A         US aprx 0½         C Dos (0EM)		Template New Template Save Delete	US or Canada C US US aprx 1002 C US US aprx 072 C DS US aprx 072 D Dos (0EM)
Job Name USAccess2000	Customer:	H	Job Name MSAccess	Customer:
<u><u> </u></u>			<u> </u>	

### For example:

- 1) Click the down arrow below the Last Name field to bring up the drop down list
- 2) Select the field that contains the Last Name information
- 3) You can assign a name to your job. If you do not assign a name, a default description for your job will be used.
- 4) Ensure you have filled in all required fields and any of the optional fields, then click "OK".

### **Single Field Data**

### Canada:

- City, Province and Postal Code<sup>OM</sup>, you must check the "One Field: City Province Postal / ZIP" box
- City and Province, you must check the "One Field: CityProvince" box

- City, State, and Zip Code<sup>™</sup>, you must check the "One Field: City State Zip(Zip+4)" box
- City and State, you must check the "One Field: City State" box

You will then be prompted for the field name containing this information

### **Multiple Field Components**

• If your address is split into many field components (eg. apartment, street number, street name, etc.), click the button to the right of the first address line. Select all address line components in the order you want them to appear and click Done.

Select Fields For Address	
<ul> <li>⊨ FirstName</li> <li>LastName</li> <li>✓ Address1</li> <li>Address2</li> <li>CityName</li> <li>Province</li> <li>PostalCode</li> <li>Language</li> </ul>	1
	Done
	<u>C</u> ancel
[Address1]	

### Language Indicator (Canada)

• If your database has a field that indicates whether the entry is French or English and you wish to use this information in your correction, select the appropriate field from the drop-down menu. Beside each language, enter the appropriate code.

### To view your data

 If you are unsure of the data contained in the fields, use the horizontal scroll bar below the database box to scroll left and right. This scroll bar will also allow you to see what will appear in the iAddress<sup>™</sup> fields. Fill in any field, then scroll left and right.

US

#### **Using Templates**

• If you frequently create jobs using the same data file, you can create a template. This template stores the field information so you do not have to select your fields when creating a new job.

#### **Character Set**

• This option tells iAddress<sup>™</sup> what type of system the data originated from so that it can "translate" various computer codes. The default is Windows; some users require OEM if their data did not originate from a Windows-based system.

### **Using Customer Information**

• If you have entered information on your customers under Company Information, you can use the drop-down here to select them. This will display their name and their associated USPS or Canada Post account number on reports.

#### **Remove Header Row**

• If you are using an Excel File and the first row contains the column headers, select this option to use the first row as column headers.

## **Address Management**

#### **Duplicate Extraction**

#### Video

Duplicate extraction utility allows you to identify and selectively remove duplicate records from your database. If you merge 2 or more files, you can identify records that are common between them. This is useful for removing suppression lists, also known as Kill Files.



From the Address Management menu, select "Priority Duplicate Extraction". Click "Process" to preform the extraction.

🖏 Duplicate Extraction	ı		×
	1 F .		<u></u>
Select fields to check fi	or duplicates	Percent Match for Name Fields	75 % 8
Address Line 1	🔲 City	<ul> <li>✓ Partial Names</li> <li>✓ Ignore Rural Addresses</li> </ul>	?
	Province	🔲 Blank and non-blank name	s are not duplicates 🛛 ?
Address Line 2	▼ Postal / ZIP	Records with all blank name duplicate processing.	es are not part of ?
		Info	
📄 First Name	🔲 Name Line 1	I otal Hecords:	5832
	🔲 Name Line 2	Records with Duplicates:	0
🔲 Last Name	Name Line 3	Duplicates:	0
	-	Common Records:	0
Perform Precorrection Perform Quick Dupe extensive)	n (faster, less ero	cess Save Job Set P	riority Priority Order
Duplicates		Common Records	
Delete	⊻iew / Print	<u>S</u> ubtract <u>V</u> iew / Pr	int Select Kill File
<u>Export</u>	Print <u>R</u> eport	Export Print <u>R</u> ep	ort <u>C</u> lose

By default, iAddress<sup>™</sup> checks for duplicate records based on address. You can customize your duplication by choosing some, all or no parts of the address. "City" is not selected by default to take into account alternate city names (for example Elk Falls, BC/Campbell River, BC or North York, ON/Downsview, ON).

You can also include other fields to identify duplicates. These are as follows:

### • First Name

All records with the same First Name will be identified. First Name will only be available if you have bound the first name field when creating your job.

### Last Name

Records with the same Last Name will be identified. Last Name will only be available if you have bound the Last Name field when creating your job.

### • Name Line (1, 2, 3)

Records containing the same information in the appropriate name line will be marked as duplicates.

### • Partial Names

Records are identified if the names are similar. For example, Commercial Bank, Commercial Bank of Canada and Commercial would be considered duplicates as long as the addresses were the same.

## • Ignore Rural Addresses

By selecting this option, iAddress<sup>™</sup> will not check rural addresses for duplicates.

### Blank and non-blank lines are not duplicate

If no data is contained in a field, iAddress<sup>™</sup> will consider this to be a unique entry and will not match it to non-blank entries.

### Records with all blank names are not part of duplicate processing

Any records where all the name fields are blank are left out of the process while checking for duplicates.

### Percent match

The percent value entered in this box allows the user to determine how similar two name fields must be before they are identified as duplicates. The higher the percent, the more exactly two name fields must match. To find exact matches, the percent should be set at 100. Lowering the percent value will allow for spelling mistakes.

### **Processing duplicates**

To check your database for duplicates, select the "Process" button and the progress bar will be displayed above the buttons. All records identified as duplicates are flagged; common records are those identified in your suppression list (Kill File) that appear in any other databases merged into your job.

When processing is complete, you can choose to view your duplicates or common records or delete them.

### **Duplicate report**

Click Print Report to produce a detailed description of your duplicate extraction results.

### To view duplicates

Selecting the View/Print will open the View Database screen with the Duplicates selected. From this screen, you can print a list of duplicate addresses or selectively delete them. You may also flag or de-flag records as a duplicate.

IA Da	atabase Vie	w									-			×
<u>B</u> ef	resh	<u>S</u> earch	Dele	te	Looku	p	Print	Addresses	M	erge	Add Fiel	d	<u>C</u> le	ose
	C Valids		CUn	correctable		Dunlicy     Description	ahesi		C Unco	nded			Fields	
C AI		C Correct	ed	C Q	uestiona	ble	C (	Common						
ſD	eìFlao Duol	icate	Set to	Keep		Next	1	Previous	1	Fir	st		Last	1
Becord	Count:	137	Job Name	r aaaNew d	emol ist	<u>11</u> 0111	File	200	New de	rnol iet vle	64832600	do		
necola	count.	107	oop name	. asamew_c	emocist		T IIC.	999	New_de	IIIOLISCAIS	04032000.7	wə		
	IsDupe	Dupes	ID	FNAM	L	MAN		ADD		ADD2		CITY		<b>^</b>
	0	1	5265											
	-1	1	5832									_		
	0	2	3806	SHARLENE	н	NZ		22 WHITE H	IILLS RE			BON	NE BAY	7 POI
	-1	2	3805	JIM	FC	DRWARD		22 WHITE H	IILLS RE			BON	NE BAY	7 POI
	0	3	1239	DEBORAH ANI	A A	RTHUR		35 WINDW0	DOD DR			LO/v	ER SA	CKVI
	-1	3	1225	ANDREW	A	RTHUR		35 WINDW0	DOD DR			LO/v	ER SA	CKVI
	0	4	3253	WILFRED M	R	CHARDSON	1	74 ELAINE [	)R			BEA	VER BA	NK
	-1	4	88	CAROL A	R	CHARDSON	1	74 ELAINE [	)R			BEA	VER BA	NK
	0	5	3794	DIMITRY	K	DRENBLIT		1108-1255 F	UE UNI			MON	ITREAL	
	-1	5	3792		C	AMIA TRADI	E INC	1108-1255 F	UE UNI			MON	ITREAL	
	-1	5	3793		C	DMMERCE (	CAMIA	1108-1255 F	UE UNI			MON	ITREAL	
	-1	5	3795	ANATOLY	N	EKHIM		1108-1255 F	UE UNI			MON	ITREAL	
	0	6	1961	EMILIE RICARD	) R	DBIDOUX		112 RUE CA	ROLINE			SAIN	IT-REM	1
	-1	6	3900	EMILIE RICARD	) R	DBIDOUX		112 RUE CA	ROLINE			SAIN	IT-REM	1
	-1	6	3905	EMILIE RICARD	) R	DBIDOUX		112 RUE CA	ROLINE			SAIN	IT-REM	1
	0	7	3777	CONSTANCE	G	AUDETTE		104-500 PL4	CE DU			MON	IT-SAIN	IT-HI
	-1	7	3775		SE	ERVICE D'A	CHETE	104-500 PL4	CE DU			MON	IT-SAIN	IT-HI
	-1	7	3776	MARCEL		DULOMBE		104-500 PL4	CE DU			MON	IT-SAIN	IT-HI
	0	8	138	PIERRE P	D	ESJARDINS		1396 COTE	JOSEPH			SAIN	IT-LIN-L	AUF
	-1	8	3608	PIERRE P	D	ESJARDINS		1396 COTE	JOSEPH			SAIN	IT-LIN-I	AUF
	0	9	1962	BAYMOND		BOOLE		303 MONTE	OBT			OTT	AWA	-
	.1	q	2901	RAYMOND	17	RUUIE		203 MONTE	ORT			OTT	AWA	
4														•

### **Deleting duplicates**

Duplicates may be automatically removed using Delete Duplicate Addresses. The following warning will appear with the total number of records to be deleted:



#### Note:

iAddress<sup>™</sup> will automatically retain the first occurrence of the addresses and delete all additional duplicates found.

Information about duplicates can be exported using the Extra Control Fields option on the Export Database screen.

### To run your job

After selecting all your options, click "Process". To stop this process while it is running, click "Cancel".

### Using a kill file

Kill/Do Not Mail files (suppression lists) are used to remove addresses from the main database(s). If you have merged more than 2 files, you will need to identify the kill file. Click the "Select Kill File" button and choose the appropriate file. After processing, all records matching the Kill file will be marked as common. You can view, print and/or export these records. When you are ready to remove the Kill file and all matching records, click subtract.

### Setting priorities for duplicates

You can decide which of your duplicate identification criteria is more important by setting priorities.

### **Deduping before correction**

If you process your duplicates before correcting your file, you should choose the Perform Precorrection option. This option corrects and standardizes your records to produce the best results.

Once your Criteria and Options are selected, click Set Priority. The following screen will appear. You can determine which options are most important by moving them up and down the list. If you don't want to use a particular option, you can remove them. You can move items related to each option in the right hand box. You can also delete them, if they are not important to your duplicate extraction.

😋 Duplicate Priority			×
Priority Options Length File Order Correct or Valid Sequential Random	Up Down Remove	Field Length FNAM ADD ADD2 CITY PROV PC	Up Down Remove
Priorities Removed Language	Restore Unit Restore All	Fields Removed	Restore Unit Restore All
		Ok	Cancel

## Length

This option selects the duplicate with the most number of characters. For example, if this option were selected for the First Name field, JONATHON would be considered a higher priority duplicate than J or JOHN. When you delete your duplicates, JONATHON would be retained while J and JOHN would be deleted.

### **File order**

If you have merged two or more files, you can determine which file is more important when determining duplicates. For example, if the third file you merge into your job is your main customer list, you can select this as the priority. If duplicates are found in your file, duplicates found in your main customer list will be considered a higher priority. When you delete your duplicates, the record from this file would be retained while the others will be deleted.

### Language

This option will prioritize duplicates by language. If English has been selected as the priority, French duplicates will be deleted before English ones.

### **Correct or valid**

Part of the standard normalization process involves a correction/validation. You can use this information to set priorities with your duplicates. By selecting this option, when duplicates are found, valid addresses will receive a higher priority. When you delete your duplicates, a valid record would be retained while others will be deleted.

### Random

If two or more entries are exact matches, this option randomly selects one over the others. This option is always the "last resort", that is, if other priorities have been selected and there are still duplicates remaining, the random selection will happen.

### Note:

The drop-down list beside the Set Priorities shows the priorities you have selected and the order in which they will be applied to your job.

### Superior record creation

This option allows you to create one record using parts of two or more duplicate records. Once you have processed your duplicates, you can access this feature by clicking the "View/Print" button and selecting "Merge" from the View Database screen. You can then select components from each duplicate record to create a single entry in your database.

# **Adding Salutations**

Genderization uses the first name information from your database to determine if the recipient is male or female. This allows you to address the mail using salutations such as Mr. and Mrs. This option will not be available if you have not selected a first and last name field. To perform Genderization, select Genderization from the Address Management menu.



This screen will appear (screen will vary slightly, depending if your job is U.S or Canadian):

🖏 Genderization		—		×
Column to Genderize	FNAM			•
Column Updated with value	FNAM_F	e Accent: Prefix	S	
Language Options				
All English				
O All French				
C Language Indicator				
C Automatic (Based on Add	dress)			
Prefixes English		French	1	
Masculine Mr.		М.		
Feminine Ms.		Mme.		
Androgynous				
No Match				
<u>G</u> enderize		<u>C</u> lo	se	

Select the column that contains the first name information using the Column to Genderize drop down list. Enter the salutation in the prefixes boxes. For Canadian mailings, you may add one for English, and one for French. Defaults can be changed to suit your mailing requirements. You can override the gender assigned to a name by iAddress<sup>™</sup> by adding the name and associated gender in the Tools/User Gender options screen. Canadian mailings are also required to select whether the file is all English or all French; if you chose a language indicator column in the database when you created the job, you may also choose "Language Indicator" to determine language.

# **Field Formatting**

Selecting Upper/Lower Case from the Correction Options screen will case your address fields only. To format the rest of the fields to be printed, select Field Formatting from the Address Management menu.



Once you have selected Field Formatting, the following screen will appear:

IA Field Formatting			Х
FNAM LNAM COMPANY NAME ADD ADD2 CITY PROV PC CUSTOMER NUMBER FIRST NAME DUP LAST NAME DUP LAST NAME DUP LANGUAGE DONATION COUNTRY MVUP_CODES F2		<ul> <li>Change field casing</li> <li>Casing Options</li> <li>All Upper Case</li> <li>All Lower Case</li> <li>Capitalize First</li> <li>Rule Capitalization (ex:MacGyver, FS Limited)</li> <li>Business Rules</li> <li>Person Rules</li> <li>Person Rules</li> <li>Vise Casing from Acronyms Database</li> <li>Apply Address casing rules to Address fields</li> <li>Replace Acronyms</li> <li>Shorten to Acronyms</li> <li>Caronyms</li> <li>Canonyms</li> <li>Remove accents</li> </ul>	
<u> </u>	<u>C</u> ancel		

On the left is a list of the fields available for Upper/Lower casing. Click on the fields you wish to Upper/Lower case. To deselect a field after selecting it, click on it again.

Once you are satisfied with your field selection, choose the format you prefer for these fields from the following:

- All Upper Case will format the fields as UPPER CASE (eg. MACGRADY, SMITH).
- All Lower Case will format the fields as all lower case (eg. macgrady, smith)
- **Capitalize First** will capitalize only the first letter of each word in your field. (eg. Macgrady, Smith)
- Rule Capitalization
  - Business Rules: Will find two or one letter words and set them full capitals and the rest are Person Rules.
  - Person Rules: Checks your fields for words that commonly have two capitals in them (eg. MacGrady, Smith)

• **Apply Address casing rules to Address Fields** will use specific casing rules for street types and the like.

### Acronyms

If you wish to expand acronyms (eg YMCA, IBM) or shorten names to acronyms, select the appropriate option on this screen. iAddress<sup>™</sup> has a database of common acronyms. You can add your own or change the casing through the Tools/User Acronyms option

After making your choice, click OK

## **Address Look-up**

Address Look-Up is a utility to find and/or verify addresses. You may do a lookup on a US or Canadian address by selecting the appropriate lookup menu option.

#### Note:

You do not need to have a job loaded to use the lookup screen.



After selecting US or Canadian Address Look-Up from the Address Management menu, one of the following screens will appear:

The results are based on address ranges and should not be used to validate the existence of individual addresses.         Quick Search         Address1         Address2         City         Search Street Name         City
Quick Search       Address1       Address2       City         Suggest €€       Search Street Name
Quick Search     Address1     Suggest     Image: Control of the search       Address2     Search Street Name     Search Street Name
Address1     Suggest     Auto Search       Address2     Search Street Name
Address2 City Search Street Name City
Clear Clear
Province Postal / ZIP Search Postal / ZIP
Longitude C Signed Degrees C Unsigned Degrees Correction Options
Possible Problem Revert to Import
C Add Record
Commeria Status
- Search
Province U
Select   Street # (optional) Lookup

IA Address Lo	ook-Up						$\times$
Street #	Suite #	Name	Zip	Zip4	Building/F	ïrm	
Quick Search Address1 Address2 City State Firm	Zip Code		<u>C</u> orrect Search Zip Code Delivery Point Carrier Route			Revert to Ir Clear Correction D	nport Iptions
Search		Stre	ets GD/RR/PO Box	es] Alternate Stree	its		
,	Select			Lookup			

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Type in as much information as you have in the Quick Search fields. Click Correct Address. If you have provided sufficient information, the address will be corrected. You can also use the buttons "Search Street Name" (Canada Only) or "Search Postal/Zip" displav range of addresses above the Ouick Search fields. to а To add a new record to your database, click the radio button labeled Add Record. Once you have entered information into the address and name fields (if displayed), click Address Save.

### Using the Drill Down Feature

You can locate addresses by using a drill down feature included in the Search section of the Lookup screen. Use the drop-down to select the appropriate province or state. All cities in that province or state will then be listed. You can scroll through the list or type in the "City" field. Once you have entered the city, click "Select".

You can now find the address by street type, as well as additional information about the address.

To find the address by street name, click the "Streets" tab. Select the appropriate street name, and click "Lookup". The ranges will be displayed above the tab.

Search		Streets CD /RR /RD Round Alternate Streets	
State	New York, NY	Attendes   Altendes Streets	
City			
BUEEALO A	BEORT BETAIL 14241	ATH ST	
BUFFALO,	14201	10TH ST	
BUFFALO, BUFFALO	14202	AMISTAD LN	
BUFFALO,	14204	ANTHONY TAURIELLO DR	
BUFFALO,	14205	BUSTIAVE	
1	Select	Lookup	
Search			
Bravinas La		Streets GD/RR/PO Boxes Alternate Streets LVRs Alternate Cities	
Province [		Next	
City   T	ORONTO	CHESTON	
TIMMINS		CHICORA	
TOBERMOR	Y	CHRISTIE	
TOLEDO	-	CHUDLEIGH	
TURONTO			
	Select	Street # (optional)	

- You can display or search for General Delivery addresses, PO Boxes or Rural Routes on the "GD/RR/PO Boxes" tab
- Alternative names for city streets are listed under the "Alternate Streets" tab
- (Canada Only) Large volume receivers and their Postal Codes<sup>OM</sup> are displayed on the "LVRs" tab

 (Canada Only) Alternative city names are displayed on the "Alternate Cities" tab. Some alternative names are not recognized by Canada Post but may be used locally

### Look-Up from View Database

If you selected an address from the View Database screen, using the Look-Up button, your address will be entered automatically under quick search. You can then use the options described above to correct your address.

The auto-search option will automatically find the address entered in the Search screen. This can facilitate searching for addresses by avoiding reentry of data. Uncheck this box if you don't want the auto-search feature enabled.

### Important!

If you have looked up an address from the View Database screen, the "Address Save" button will appear. If you correct your address and click this button, the database and the Validation Report will automatically be updated.

# **Filter Mailing**

You may wish to mail only parts of your job, perhaps as a random sampling or to addresses meeting specific requirements. By selecting Filter Mailing from the Address Management menu, you can decide how many addresses and which addresses you want to use for your mailing.



After selecting Filter Mailing, you have several options to choose from. You may choose one of the following tab options:

- Intelligent Selection: Allows you to select your mailing by removing States/Provinces, Cities, Address Types and/or FSA<sup>OM</sup>s (Canada)/Zip Code<sup>™</sup> (US).
- **Random Selection:** Allows you to choose a sample mailing from within your database.
- **SQL Exclude:** An expert filter, which allows you to craft a database query to remove records from your database.
- Address Filter: A combination filter allowing exclusion based on correction types, files or blank lines.
- **Extra Characters:** Removes symbols and other characters that represent commands in certain database formats. These symbols and characters can impact printing of files later.
- **Custom Exclude:** An advanced custom filter that allows you to filter based on specific rules.
- **Geocode Filter (Canada Only):** If you have run Geocoding with a distance list, you may filter out records based on distance.
## **Excluding Addresses**

IA Filter Mailing	X			J	IA Filter Mailing			X
Extra Characters	Special Filter	Custom Exclude	Geocode Filter		Extra Characters	Special Filter	Custom Exclude	
Intelligent Selection	Random Selection	SQL Exclude	Address Filter		Intelligent Selection	Random Selection	SQL Exclude	Address Filter
Filter Province	Sort By Alphabetic ASC -				Filter State	Sort By Alphabetic ASC		
AB         (Records 1098)           BC         (Records 968)           MB         (Records 246)           NB         (Records 252)           NF         (Records 76)           NS         (Records 128)           ON         (Records 5586)           PE         (Records 61)	-	700 Mt Pleasant Ron (Recoi Abbotsford (Records 2) Acton (Records 3) Airdrie (Records 1) Aldergrove (Records 2) Amherst (Records 1) Amherstview (Records 3) Ancaster (Records 13)	ds 1)		AZ         (Records 11)           CA         (Records 10)           MA         (Records 11)           MD         (Records 11)           MO         (Records 12)           MS         (Records 12)           NJ         (Records 46)           NM         (Records 11)	E	ALAMOGORDO (Records 6) AMADOR CITY (Records 3) ANNAPOLIS JUNCTION (Re ARGYLE (Records 4) AUBURN (Records 7) CAMDEN (Records 23) CARRIZOZO (Records 5) FREDERICK (Records 23)	ecords 3)
Filter Address Type               FSA             CFirst 4             CFirst 5             CPC            Unknown         (Records 10000)               A1A             (Records 25)               A1B             (Records 16)               A1C             (Records 17)               A1L             (Records 3)               A1W             (Records 2)               A1W             (Records 17)               A1L             (Records 2)               A1W             (Records 2)               A1W             (Records 2)               A1W             (Records 17)               A1W             (Records 2)               A1X             (Records 1)               T             (Records 1)               A1X             (Records 1)               A1W             (Records 1)               A1W             (Records 1)               A1W             (Records 1)				Filter Address Type		C 3 Digits (* 01101 (Records 4) 01103 (Records 4) 01104 (Records 4) 08103 (Records 23) 08107 (Records 23) 10601 (Records 4) 10602 (Records 4) 10602 (Records 4)	5 Digits	
	E <u>x</u> clude	;		╢		E <u>x</u> clude	•	
Job Info	<u> </u>	BW	Export Filtered		Job Info	<u> </u>	BW	Export Filtered
# of Records: 10000	Res	tore	<u>S</u> ave Filtered		# of Records: 262	<u>R</u> e:	tore	<u>S</u> ave Filtered
O records have been filtered	<u> </u>	ar	Done		O records have been filtered	<u></u>	ear	Done

Using the Intelligent Selection Tab, you can delete addresses from your job based on the following criteria:

- Province/State
- City
- Address Type (eg. apartments, residences, etc.)
- (Canadian Mailing) FSA<sup>OM</sup> (first three characters of the Postal Code<sup>OM</sup>), the first four or five characters of the Postal Code<sup>OM</sup>, or the entire Postal Code<sup>OM</sup>.
- **(US Mailing)** Three or five digits of the Zip Code<sup>™</sup>.

Scroll through the lists to view the options within each criteria. The number of records that match that filter option are listed after each item. In order to exclude more than one item from each criterion, select the first one and click the Exclude button. Select the second item and click the Exclude button. When you are satisfied with your choices, click "Done".

## Selecting a Sample Mailing

To prepare a random sample from your database, click on the "Random Selection" tab. The following screen will appear.

IA Filter Mailing			×
Extra Characters Spe	cial Filter	Custom Exclude	Geocode Filter
Intelligent Selection Random	Selection	SQL Exclude	Address Filter
Enter a number of The number entered will 500 records and enter 30	random red be the records kept 10, 200 will be filtere Select rrectables	cords to be sele . For example, if you have d out randomly.	cted
Job Info	⊻iew		Export Filtered
Filter Seed Records # of Records: 10000	<u>R</u> estore		<u>S</u> ave Filtered
U records have been hitered	<u></u> lear		Done

- Enter the number of records. After pressing "Select", the total number of records in the database is changed to the number you selected. You may still exclude addresses from this sample using the Intelligent Selection and Exclude Tool options.
- If you select the "Filter Only Uncorrectables" option then the records that are discarded will come only from the uncorrectable records. If you do not have enough uncorrectable records then nothing will be filtered and you will be informed.

## **Custom Exclude Tool**

- Using the Custom Exclude Tool allows you to remove addresses based on very specific criteria from any field within your database. Click on the tab labeled "Custom Exclude Tool". Select the field you wish to use from the Filter Where drop down.
- The center drop down menu contains the selection operators. Empty fields can be detected using " is null " or non-empty fields with " is not null ". Comparing

alphanumeric fields can be done using the " like " operator with wildcard characters. For example " \*main st " would select anything that ended in " main st ". For numeric fields, these include such operands as +, -, =, >, <.

IA Filter Mailing			×
Intelligent Selection Ran	ndom Selection	SQL Exclude	Address Filter
Extra Characters Spe	ecial Filter	Custom Exclude	Geocode Filter
Custom Exclude Tool Filter where	Exclude		
Job Info	⊻iew		Export Filtered
Filter Seed Records # of Records: 20000	<u>R</u> estor	e	<u>S</u> ave Filtered
U records have been filtered	<u>C</u> lear		Done

## SQL Exclude

- The SQL Exclude tool is an advanced form of Custom Exclude tool allowing you to create your own SQL ' where ' clauses.
- The fields on the left are listed as a reference but can also be inserted in the WHERE clause text box by double clicking the field name.
- To generate the WHERE clause simply type the entire statement in the WHERE clause text box. The WHERE clause text box does not require the word 'Where' simply begin from the first statement, for example CITY= 'Buffalo' AND STATE= 'New York' to select all records that match to the city of Buffalo and the state of New York.

IA Filter Mailing			×			
Extra Characters	Special Filter	Custom Exclude	Geocode Filter			
Intelligent Selection	Random Selection	SQL Exclude	Address Filter			
Expert Exclude Tool         Enter an SQL WHERE clause into the box for an expert exclude.         SQL Operators [=, <, >, <>, is null, not, and, or]         Text Example = 'Text'         Number Example = 123         Wildcard = * (only with like operator)         Field List         RESBUS         iAddressID         PALLET         STREETNUMBER         STREETNAME         STREETNAME         STREETDIR         SUITE         POBOXNUMBER         RRNUMBER         Status         Comment						
	Exc	lude				
Job Info	i∈	3W	Export Filtered			
# of Records: 10000     Restore     Save Filtered						
U records have been filtered	<u>_</u> [e	ar	Done			

## **Address Filter**

IA Filter Mailing				×
Extra Characters	Special Filter	Custom E	Exclude	Geocode Filter
Intelligent Selection	Random Selection	SQL Excl	ude	Address Filter
Remove records following         Uncorrectable Addre         Questionable Addresses         Corrected Addresses         Valid Addresses         Foreign Addresses         U.S.         U.K.         Unknown         Uncoded / Invalid R         Exclude	that are of the type: esses sses s	Remove reco follo 1 - MSAccess.mdb 2 - Tab.txt Remove reco fie Address City	Exclude Exclude Exclude	riginated in the led file: e the following ank: ✓ Address 2 ✓ Province IP
Job Info		⊻iew		Export Filtered
Filter Seed Records # of Records: 20000	Ī	Restore		<u>S</u> ave Filtered
U records have been filtered		<u>C</u> lear		Done

Address Filter tab has three specific functions.

## **Select Records**

The first allows you to remove records based on their correction status. Please note, that you must run a Correction/Validation before these options become available. These status types are:

- Uncorrectable
- Questionable
- Corrected
- Valid
- Foreign

• Uncoded

# Select the type(s) of addresses you want to remove by checking the appropriate boxes. Click Exclude.

- Select files: may specify which records you want removed by the originating source file. To do this, select the record type and then files(s) from which you want the records removed.
- Blank lines: to remove addresses which do not contain data in certain fields, select the "Blank Lines" tab. Click the field you wish this condition to apply to and select "Exclude"

## **Extra Characters**

 If your database contains symbols or characters within the data, you can remove them automatically by using the Extra Characters screen. Select the characters you wish to have removed, or leave the defaults if you are not certain. After selecting "Replace", iAddress<sup>™</sup> will tell you how many extra characters were found and replaced within your file.

•

IA Filter Mailing			×
Intelligent Selection Rand	om Selection SC	L Exclude	Address Filter
Extra Characters Spec	ial Filter Custo	m Exclude	Geocode Filter
FirstName         LastName         ADD         ADD2         CITY         PROV         PC         Language         COUNTRY         NCOA         CMA_CODES         FLG_GEOLAT         FLG_DEOLONG         FLG_DISTANCE	<ul> <li>Windows New Line</li> <li>Line Feed</li> <li>Tab</li> <li>Form Feed</li> <li>Carriage Return</li> <li>Non Breaking Space</li> <li>Double Space</li> <li>Non-visible control cl</li> <li>Replace</li> </ul>	s naracters	
Job Info	⊻iew		Export Filtered
Filter Seed Records      # of Records: 20000	<u>R</u> estore		<u>S</u> ave Filtered
O records have been filtered	<u>C</u> lear	Done	

## Geocode Filter (Canada Only)

- After you have run Geocoding on your file, you can use the filtering tool for targeted mailings. On this tab you can remove records from your database based on Geocoding results.
- You may filter out all records that are closer, or further then a specified distance with the Filter by Distance text boxes. You can also Filter by Pieces, which will remove the specified number or farthest or closest records. Checking the "FIlter Non-Geocoded Addresses" option will remove any records that were not geocoded.

IA Filter Mailing			×
Intelligent Selection Rand	om Selection	SQL Exclude	Address Filter
Extra Characters Spec	ial Filter	Custom Exclude	Geocode Filter
Filter by Distance         Closer than:         Farther than:         Filter No	Filte Km Num Km <b>on-Geocoded Ad</b>	er by Pieces ber of Pieces: C Cla dresses e	rthest osest
Job Info	⊻iew		Export Filtered
Filter Seed Records # of Records: 20000	<u>R</u> estor	e	<u>S</u> ave Filtered
U records have been filtered	<u>C</u> lear		Done

## Important!

**Filtering records permanently changes your job.** If you wish to keep your original job, ensure you have saved your job **before** filtering. Save your filtered job with a different name.

#### **After Filtering**

After filtering your records, you can choose to View, Restore, Clear, Export, or Save those filtered records.

#### View

Clicking "View" will show the filtered records in a database view.

#### Restore

Clicking on the "Restore" button will remove all your filters, and restore all the filtered

records to the job. This only works if you have not cleared the filtered records using the "Clear" button.

#### Clear

Clicking on the "Clear" button will permanently remove all the filtered records from the job.

#### **Exporting Records**

If you wish to export your filtered records to a separate database, select the "Export Filtered" button and choose a name for your new file.

## **Saving Records**

If you wish to have your filtered records split to a seperate iAddress job, select "Save Filtered" button and choose a name for your new job.

## **Restoring Records**

To restore filtered records, click the Restore Filtered Records button. Records that have been removed using Clear button cannot be restored.

## **Split Database**

The split database utility allows you to separate databases with records from more than one country and export only those records from the job. After performing a correction/validation on a file, select "Split Database" from the Address management menu.



The following screen will appear.

🔄, Split Database	×
- Percentages American: 0.00%	U. K.: 0.00%
Canada: 99.98%	Unknown: 0.02%
-Records to Save	
🦳 American	🗖 U.K.
🔲 Canadian	🔲 Unknown
-Export Types-	
Excel 97	•
<ul> <li>Export Column Headers</li> <li>Remove on Export</li> </ul>	
<ul> <li>Exported Character Set</li> <li>Windows (Ansi)</li> <li>Dos (Oem)</li> </ul>	<u>Export</u>

Select which records are to be saved and your export options then click "Export".

## **Demographic Information on your Job**

Selecting the Demographic Analysis option on the Address Management menu displays information on your job by province, address type, FSA<sup>OM</sup> and city. After running correction/validation on your job and selecting Demographic Analysis, the following screen will appear:



You may select which items you wish to see in your report by using the "Add to Report" and "Remove from Report" buttons. Select the "Generate Report" button to see the results

IA Generate Demographic Analysis	Report	×
Select Report Items	Included In Report	
Provinces, ordered by count Provinces, ordered alphabetically FSAs, ordered by count FSAs, alphanumeric order 1st letter of PC, ordered by count 1st letter of PC, alphanumeric order Cities, ordered by count Cities, ordered alphabetically Address Type, ordered by count	Add to Report       Detailed Validation Report         Add to Report       Detailed Address Type Report         Remove from Report       Image: Clear List	
Add Custom Item		
Edit Custom Item	Generate Repor	

To view your report, use the scroll bar on the right side of the Demographic Analysis screen. Click generate report and something resembling this will appear:

IA Demographic Analysis			— (	⊐ ×
Print Setup Printer		Save to <u>F</u> ile		<u>C</u> ancel
PROVINCE	PIECES	VALID	CORRECTED	UNCI
NEWFOUNDLAND	96	87	5	
NOVA SCOTIA	148	101	21	
PRINCE EDWARD ISLAND	16	10	3	
NEW BRUNSWICK	167	147	10	
QUEBEC EAST	441	336	68	
MONTREAL METROPOLITAN	199	161	27	
QUEBEC WEST	750	532	136	
EASTERN ONTARIO	274	204	55	
CENTRAL ONTARIO	718	547	130	
TORONTO METROPOLITAN	218	159	52	
SOUTHWESTERN ONTARIO	304	246	40	
NORTHERN ONTARIO	166	113	26	
MANITUBA	259	228	16	
SASKAICHEWAN	273	254	11	
	1340	637	502	
RELITION COLOMBIA	537	375	119	
MARAN TEDDITODIES / MANAAAAA		4	2	
ADKON IEKKIIOKIE?	0	0	ម	
UINEK	1	ម 	ម 	
TOTAL ADDRESSES	5920	4147	1283	
TOTAL URBAN ADDRESSES	5850	4105	1255	~
<				>

## Validation Report/Statement of Accuracy

The Validation Report provides information on the accuracy of your data. It lists the total number of records as well as the number of records that are valid, corrected and uncorrectable (unable to be corrected).



After correcting your addresses, choose "Validation Report" from the Address Management menu. The following screen will appear:

C3. Validation Report							×
- Customer Information Customer Name (Your Company Name)		Mailing on I	Behall	fOf			
Company Name							
Customer Number (Your number)	Customer's	CPC	Number		_		
Customer Num							
Date of Mailing		Office of De	eposit				
2017-06-12		Office					
Validation Report		Corrected Report		γu	ncorrectable R	eport	
Job Name:			aa	aaNew_demo	oList		^
Software & Version Number	:		i <i>k</i>	ddress Ve	ersion 20	14	
Customer Name: Customer Address:			Co 12 Ci	mpany Na 23 Main St	ue treet PostalCo	de	
Customer Telephone Number: Customer Number: Date of Mailing Selected:			(1 Cu 20	11) 222-3 stomer Nu )17-06-12	3333 1m		
Expiry Date of Delivery M Serial Number of Delivery	ta CD: Data CD:	20 P3	)17-06-15 310202556:	1101			
Options:		Upper Case Two Line Western Style Shorten Stree	e ets				~
Print Validation Report		<u>S</u> ave to File					
View Corrected View Uncorrected Addresses Addresses	able	Filter Records by Correction Type			Print All	Save	e All
Do NOT display this window after the correction completes.					Close		

#### **Mailing Accuracy**

It is important to check the Validation Report for your accuracy level. If your mailing will be less than 5,000 pieces, you do not need to achieve a 95 percent accuracy rate. However, if your mailing is more than 5,000 pieces, you must achieve at least 95 percent accuracy.

The percent valid is calculated automatically. From this screen, you can choose the following:

- view corrected addresses
- view uncorrectable addresses
- filter corrections
- print the validation report
- save to file

#### **View Corrected Addresses**

Selecting this option allows you to view and print the corrected addresses. This provides a list to bring up to date the original database. The report will show where the corrections were made, as well as the accurate address.

#### **View Uncorrectable Addresses**

Selecting this option allows you to view and print the uncorrectable addresses. This provides a list to bring up to date the original database. You may wish to keep some addresses in your job considered uncorrectable by Canada Post, such as international addresses, and you can delete addresses for which there was insufficient information to perform the correction. To remove all uncorrectable addresses, click the "Filter Records by Correction Type".

To look at individual uncorrectable addresses, click the "Lookup" button on the "View Database" screen. Further information on the Lookup screen is provided in a later section. If you correct theses addresses in the Lookup window and save the results, your Validation Report will be automatically updated. Instructions on manually correcting your addresses are shown below.

#### **Filter Record**

You can choose the record by correction type. For further information see page 49 of the manual "Selecting Records" section

#### Important!

If you choose, you can remove all or some of the uncorrectable addresses within your iAddress<sup>™</sup> job. iAddress<sup>™</sup> will automatically bring up to date your validation report.

#### **Print Validation Report**

Validation Reports must be submitted to Canada Post when you are mailing more than 5,000 pieces. However, you may choose to print the Validation Report for your own records, even if your mailing is less than the 5,000 piece threshold.

#### **Corrected Report**

This report contains a summary of corrections made to your addresses during processing.

#### **Uncorrectable Report**

This report summarizes addresses that couldn't be corrected and the possible problems encountered.

#### **Making Manual Corrections**

To manually fix your uncorrectable records, first view them in the View Database screen. You can enter this screen by clicking View Uncorrectable Addresses on the Validation Report screen or by selecting File/View Database and clicking the Uncorrectable radio button at the top.

Choose the record you wish to manually correct (or the first record in your list) and click the Lookup button at the top of the screen. The record will now be loaded into the Lookup screen. The feature located to the right of the Correct box will take you to Google Maps and will plot the address for you.

IA Address Look-Up	-		×
The results are based on address ranges and should not be used to validate the existence of individual addresses.			
Quick Search	-		
Address1 384-788 BAY ST Suggest Suggest Address Correct / Questionable	Auto	Search	
Address2	Next	record	
City Search Street Name Address Save	Previou	is record	
Province ON Postal / ZIP P6A 6L7 Search Postal / ZIP Delete record	<u>C</u>	lear	
Longitude C Signed Degrees C Unsigned Degrees	Correctio	on Options	\$
Corrected Municipality Revent to Import	Edit Recor Add Recor	d	
Search Province City Select Streets GD/RR/P0 Boxes Alternate Streets LVRs Alternate Cities Next			

To see the directory listing for this address you can click either the "Search Postal/Zip" or "Search Street Name" buttons. The directory listing(s) for the Postal Code<sup>OM</sup> or street name will appear in the window. If one of these listings is an appropriate correction for

your record, you can double-click the directory entry. A box will appear asking for the street number and Apt/PO Box number. Enter the street number and apartment or PO box number (if applicable) and click OK.

🔄, Enter Street Number/Apt Number	×
Street # - ALLEN'S SIDE RD	Apt/PO Box
	<u>O</u> k <u>C</u> ancel

You can also use the search feature at the bottom of the screen. Choose the appropriate province then choose the city from the list provided. Click the selection button. A list of all street names will appear on the right. You can search for PO Boxes, Rural Routes, Large Volume Receivers (LVR) and verify alternate city and street names.

## **Saving Your Manual Corrections**

Once you have manually corrected your address, click the Correct button. Your address may now be Valid, Corrected or might remain Uncorrectable. If you want to save this address back to your job, click Address Save. If you want to keep the original entry, you can reverse your manual correction by clicking Revert to Import. If you want to remove this record, click that button.

Move through your database by clicking the Next Record or Previous Record buttons.

#### **Adding Additional Records**

If you have last minute additions to your job, you can add these addresses to your database by entering them through the Lookup screen. Click the Add Record radio button and enter the address. Remember to click Correct and Address Save to ensure you are adding a cleaned address to your job. This step is appropriate for small number of additional addresses. If you have a larger number to enter, it might be more efficient to use the Address Management/Uncorrect option and merge another file into your job using File/Merge Into Job option.

#### **Correction/Validation**

Video

Validating a job ensures that your addresses are recognized by Canada Post. Each address is compared and matched against the Canada Post address database.

You are provided with two options in iAddress™:

- Correction and validation of your data
- Validation only of your data



#### **Correction and Validation**

Select "Correction/Validation" from the Address Management menu. The following screen will appear:

Correction Options	×
Mailing Date :	8 /16/2017 🗸 🧣
- Language Options	Formatting Options
<ul> <li>Automatic</li> </ul>	Upper/Lower Case
C All English	Address Line Formatting
C All French	Romerence     Prefer 2 Line     Force 1 Line
C Language by Province	Use Accents
C Language Indicator	✓ Western Style ✓ Shorten Address
- Amalgamation Mappings	Update LVR
Lévis Amalgamation (Valid for mailings on or after	🔽 Update Valids
February 12, 2015)	Minimum SERP Rural Standards
	Space in Postal Code (OM)
	Use imported city name
Start	Cancel

## **Mailing Date**

iAddress<sup>™</sup> allows you to enter the date you will be mailing your job. It will correct and validate your job against the CPC data valid for that date. If you have chosen a non-valid date, iAddress<sup>™</sup> will display an error message.

## Language Options

The following options are available for language:

- **Automatic** retains the language originally entered in the database by <u>individual</u> record. If an address has been entered partly in English and partly in French, iAddress<sup>™</sup> calculates the language used predominantly within the record and assigns the language accordingly.
- All English converts all addresses to the English equivalent.
- **All French** converts all addresses to the French equivalent.
- Language by Province will convert Quebec addresses to French and all other Canadian addresses to English.
- **Language Indicator** will use the field designated as the Language Indicator field (set at job creation time) to determine the language of a record

## **Formatting Options**

As well, the following options can be selected by clicking on the box in front of the option. To deselect, click again.

- **Machineable** formats your address to meet the CPC criteria for machineable mail. This options forces the following formatting options.
  - Upper/Lower Case is set to off (Address all Upper Case).
  - Two Line Output is set to off (only a one line address is returned).
  - Use Accents is set to off (no accents returned).
  - Western Style is set to on (address is formatted to western style to increase readability)
  - Shorten Address is set to on (street types are abbreviated).
- Upper/Lower Case converts addresses to UPPER and Lower case equivalents.

#### \*\*\*Important!

# UNLESS YOU CHOOSE THIS OPTION, ALL ADDRESSES WILL BE PRINTED IN UPPER CASE.

#### **Address Line Formatting**

- **No Preference** the software will select whichever format seems appropriate.
- **Prefer 2 Line** adjusts the database to a two-line format where it is allowed. For example:

123 Main Street Apt 1000 Oakville ON 1A2 B3C

becomes

Apt 1000 123 Main Street Oakville ON 1A2 B3C

- **Force 1 Line** is available if you only imported one address line. If the software prefers a two line output then the two lines will be joined into one field.
- **Use Accents** adds French accents to addresses when French has been selected.
- **Western Style** formats your address to meet the CPC criteria for Western Style. It has no qualifier for apartment or unit numbers. For example:

123 Main Street Apt 1000 Oakville ON 1A2 B3C becomes

1000-123 Main Street Oakville ON 1A2 B3C

- Shorten Street converts addresses to the Canada Post approved short forms.
- **Update LVR** standardizes large volume receiver names in your job.
- **Update Valids** replaces a valid address with a formatted valid address. The format is determined by the options you have selected. For example:

55 Trafalgar Court

becomes

55 Trafalgar Crt

- **Minimum SERP Rural Standards** The default in iAddress<sup>™</sup> is to correct rural addresses using very strict validation rules. If the Canada Post database contained PO Box information, that information was required to validate or correct the address. However, under SERP requirements, a rural address only needs to have the correct city and Postal Code<sup>OM</sup> to be considered valid.
- **Space in Postal Code<sup>oM</sup>** formats your Postal Code<sup>OM</sup> with a space after the first three characters: A1A 1A1. If this option is not selected, the Postal Code<sup>OM</sup> will be formatted as A1A1A1.

## Validation Only

Select "Validation" from the Address Management menu. You do not select language options with Validation only.

## **To Run Your Job**

After selecting all your options, click "OK". To cancel your job while it is running, click "Cancel".

## To Undo the Correction

To undo the correction, select "UnCorrect" from the Address Management menu

## Move Update (NCOA)

## National Change of Address (NCOA)

NCOA is a pay-for-use service. To access this module, you will need to purchase transactions (1 transaction equals 1 processed address). These must be purchased directly through Flagship Software.

After performing duplicate extraction (optional), address correction and any other filtering on your job, you can process your addresses through the NCOA module. Your database must contain name fields as an address can only be matched if the name at the address is also a match.

#### Video

To start an NCOA job, select "Process NCOA/DNM" from the NCOA/DNM menu.



The following screen will appear:

Job Wizard					
ORIGFNAM	FNAM	ORIGLNAM	LNAM	СОМ	~
TIMOTHY E	TIMOTHY E	SIMON	SIMON		
CECILE	CECILE	AUDETTE	AUDETTE		
LINDSAY J	LINDSAY J	THOMAS	THOMAS		
LEONA	LEONA	GLENNON	GLENNON		
COURTNEY	COURTNEY	SWANN	SWANN		v
<				>	
Selec	ct the fields in	which cont formation	ain the nam	1e	
<ul> <li>Separate</li> </ul>	e Name Fields	: O Cor	mbined Name	Fields	
First Name:	FN	AM		•	•
Middle Nam	e:			•	•
Last Name:	LN	AM		•	•
Name Suffix	: _			•	-
Company Na	ame:			•	•
		<u>N</u> ext	> [[[	ancel	

#### **Selecting Fields**

All fields in your database are listed so that you can locate and select the name fields you wish to use.

#### • Separate Name Fields/Combined Name Fields:

You can choose to have your name fields combined or separate. For example:

Separate Name Fields: "Todd" "Martin"

Todd is the first name and Martin is the second.

Combined Name Fields: "Todd Martin"

The NCOA process will attempt to match either Todd Martin or Martin Todd at the given address.

#### Company Name

If you have a company name in your database, use the drop down to select it here.

## **Job Settings**

## • Job Name

This is the name that will appear on detailed reports to help identify different NCOA runs.

#### End User

To run NCOA an end user terms of use ID must be used. Select from this list the customer record whose ID you wish to use for this NCOA run.

## • Apply Matches / Purge Nixies

Checking these options will cause the matches to be applied and nixies to be purged automatically after the NCOA run.

## Run CMA

If you choose to run DNM, the addresses in your database will be verified against the national Do Not Mail List.

- Match First and Last Name Match against the DNM database using first and last name as well as the address. (Preferred)
- Match Last Name Only Match against the DNM database using only the last name as well as the address.
- Match Address Only Match against the DNM database using only the address.

## • Purge DNM

After processing your NCOA job, having this box checked will cause all the matched DNM records to be purged automatically.

## • Run in Secure Mode

The option will cause the data to be encrypted during the transfer to the NCOA server.

Click Process to start your NCOA job.

🖏 Job Wizard	-		$\times$				
Select how iAddress sho from the mov	Select how iAddress should handle the results from the move update						
Job Name							
aaaNewdemoList							
End User							
Company Name			•				
Apply Matches	🗖 Purge	Nixies					
🔲 Run Deceased	🔲 Purge	: Decea	sed				
🔲 Run DNM	🔲 Purge	DNM					
Match First And Last N	ame						
C Match Last Name Only							
C Match Address Only							
🥅 Run In Secure Mode							
< <u>B</u> ack	Process		ancel				

## **Running your Job**

 Once you have pressed the process button, the NCOA window will close and a progress bar will appear. The NCOA processing speed is dependent upon the speed of your computer, the speed of your connection and how many other people are processing NCOA at the same time as you.

## Important!

 The Cancel button will allow you to stop processing NCOA part way through the job. Once canceled it may take a few moments to stop processing because your computer must inform the NCOA server so that you are not charged for records that you don't receive. Any records that were processed before canceling will be charged against your account and are still valid.

## Important!

• If you selected Purge DNM/Apply Matches/Purge Nixies, the viewing window will not appear after the NCOA job is processed.

# Move Update (NCOA)

#### National Change of Address (NCOA)

NCOA is a pay-for-use service. To access this module, you will need to purchase transactions (1 transaction equals 1 processed address). These must be purchased directly through Flagship Software.

After performing duplicate extraction (optional), address correction and any other filtering on your job, you can process your addresses through the NCOA module. Your database must contain name fields as an address can only be matched if the name at the address is also a match.

# **Running Canadian NCOA**

To start an NCOA job, select "Process NCOA/DNM" from the NCOA/DNM menu.



The following screen will appear:

Job Wizard				
ORIGENAM	FNAM	ORIGLNAM	LNAM	СОМ 🔨
TIMOTHY E	TIMOTHY E	SIMON	SIMON	
CECILE	CECILE	AUDETTE	AUDETTE	
LINDSAY J	LINDSAY J	THOMAS	THOMAS	
LEONA	LEONA	GLENNON	GLENNON	
COURTNEY	COURTNEY	SWANN	SWANN	>
<				>
Selec	ct the fields in	which cont formation	ain the nam	1e
Separate	e Name Fields	: O Cor	mbined Name	Fields
First Name:	FN	АМ		•
Middle Nam	e:			•
Last Name:	LN	АМ		•
Name Suffix	:			•
Company Na	ame:			•
		<u>N</u> ext	· > [ [ [	ancel

#### **Selecting Fields**

All fields in your database are listed so that you can locate and select the name fields you wish to use.

#### • Separate Name Fields/Combined Name Fields:

You can choose to have your name fields combined or separate. For example:

Separate Name Fields: "Todd" "Martin"

Todd is the first name and Martin is the second.

Combined Name Fields: "Todd Martin"

The NCOA process will attempt to match either Todd Martin or Martin Todd at the given address.

## Company Name

If you have a company name in your database, use the drop down to select it here.

#### Job Settings

#### • Job Name

This is the name that will appear on detailed reports to help identify different NCOA runs.

#### End User

To run NCOA an end user terms of use ID must be used. Select from this list the customer records whose ID you wish to use for this NCOA run.

## • Apply Matches / Purge Nixies

Checking these options will cause the matches to be applied and nixies to be purged automatically after the NCOA run.

#### Run CMA

If you choose to run DNM, the addresses in your database will be verified against the national Do Not Mail List.

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- Match Last Name Only Match against the DNM database using only the last name as well as the address.
- Match Address Only Match against the DNM database using only the address.

#### • Purge DNM

After processing your NCOA job, having this box checked will cause all the matched DNM records to be purged automatically.

#### • Run in Secure Mode

The option will cause the data to be encrypted during the transfer to the NCOA server.

Click Process to start your NCOA job.

🖏 Job Wizard	-		$\times$				
Select how iAddress sho from the mov	Select how iAddress should handle the results from the move update						
Job Name							
aaaNewdemoList							
End User							
Company Name			•				
Apply Matches	🗖 Purge	Nixies					
🔲 Run Deceased	🔲 Purge	: Decea	sed				
🔲 Run DNM	🔲 Purge	DNM					
Match First And Last N	ame						
C Match Last Name Only							
C Match Address Only							
🥅 Run In Secure Mode							
< <u>B</u> ack	Process		ancel				

## **Running your Job**

 Once you have pressed the process button, the NCOA window will close and a progress bar will appear. The NCOA processing speed is dependent upon the speed of your computer, the speed of your connection and how many other people are processing NCOA at the same time as you.

## Important!

 The Cancel button will allow you to stop processing NCOA part way through the job. Once canceled it may take a few moments to stop processing because your computer must inform the NCOA server so that you are not charged for records that you don't receive. Any records that were processed before canceling will be charged against your account and are still valid.

## Important!

• If you selected Purge DNM/Apply Matches/Purge Nixies, the viewing window will not appear after the NCOA job is processed.

# Viewing and Applying the Results

Once your NCOA job completes, if you did not select to automatically apply matches and purge nixies then the results viewing window will open. To remove the nixie records from your database press the "Purge Nixie Records" button (3), to apply the changes that have been suggested by the NCOA process press the "Apply Changes" button(5), and to remove the DNM records press the "Purge DNM" button(7).

Nixie records indicate that the occupant has moved but no new address is available for them. It is recommended that you remove nixie records from your job and update your main database.

🔄 NCOA vie	w									X
-View Records	s anges	Nixie Records Purge Nixie Records	NCOA update Apply	Changes (	<b>5)</b> [ <sup>DN</sup>	M Records Purge I	DNM Records	7	Restore	а 🧿
O Nixie Rec O DNM Rec	ords 🛂 cords	Export Nixie Records	Export	Changes	6	Export	DNM Records	8	Close	Ū
Update I Y Y	AddressID NCOA 14 UI 40 UI	Ncoa_Fnam Ncoa_Mnan Ncoa_Lnam N	Icoa_Sfx Ncoa_ad ONNICI 2 CITY LI	d1 <u>Ncoa_add2 N</u> DR H NE S	Icoa_City IAMILTON SAINT JOHI	Ncoa_PC L9B2P1 E2M1M1	Ncoa_Prov ON NB	Ncoa_Cntry CANADA CANADA	ORIGFNAM	<u>origli</u> 🔺
Y Y Y	75 UI 90 UI 115 UI		RISON PO BOX YPRES A	RD M 430 N VE V	IARMORA NORTH YO √INDSOR	K0K2M0 M2N6N1 N8W5H1	ON ON ON	Canada Canada Canada		
Y Y Y	144 UI 170 UI 192 UI		01 10TH 3 17TH A VOOD DI	ST H VE H 3E V	IANOVER IANOVER VINNIPEG	N4N1M9 N4N3A2 R3P2P3	ON ON MB	Canada Canada Canada		
Y Y Y	204 UI 234 UI 269 UI		RTAGE A LINDEN BASCA S	VE H DR V TE M	IEADINGLE √INKLER 400SE JA\	R4H1E1 R6W1X8 S6H0L4	MB MB SK	CANADA CANADA CANADA		
Y Y Y	306 UI 311 UI 345 UI		T UNIT AD RD M	104 C IW C	algary Algary Live	T2X2C7 T3B3V3 T0C0Y0	AB AB AB	CANADA CANADA CANADA		
Y Y Y	370 UI 387 UI 400 UI		STINA C EWOOD 82 AVE 1	RT S DR S IW E	HERWOO T. ALBER DMONTON	T8H2H4 T8N0B6 T6C4L9	AB AB AB	CANADA CANADA CANADA		
Y V ↓	407 UI		51 AVE 1	IW E	DMONTO	T6H5B4	AB			<u> </u>

A sample report is shown below. As this is live data, names have been blocked.

1. This window displays the new address for your matches, the original addresses, and those that resulted from being corrected. The "NCOA" column indicates the record type.

2nd Character		3rd Character				
U	Unapplied	F	Family Move	х	Privacy	
А	Applied	I	Individual Move	М	Move Back	
		В	Business Move	С	Changed by Canada Post	
		N	Nixie Record	U	Rural to Urban Address Conversion	
Othe	er NCOA Codes					
UM	Unmatchable –	Gene	ral Delivery, Invalio	d or N	o Name	
NM	NM Non-Matched Record – Valid Address that does not appear in the NCOA database. (The person has not moved)					

Double-clicking a record in this table will highlight it and switch its Update column from Y' (yes update), to N' (do not update). Double-clicking again will return it to Y'.

- 2. Allows you to view NCOA changes, nixie records or DNM records.
- 3. The "Purge Nixie Records" button will remove all nixie records from your database where the "Update" column is set to 'Y'.
- 4. Move to the NCOA Export screen.
- 5. The "Apply Changes" button will update your job with the new addresses. Note that only records marked with 'Y' in the Update column will be affected.
- 6. Move to the NCOA Export screen.
- 7. The "Purge DNM Records" button will remove all the DNM records from your database where the "Update" column is set to 'Y'.
- 8. Move to the Export screen.
- 9. Pressing the "Restore All" button will restore all the purged nixie and DNM records and reverse the NCOA changes that were applied.
- 10. The "Close" button will close the window.
- 11. The update column reflects which records will be purged or changed. If the update field is set to 'Y' then the record will be purged or changed. If the field is set to 'N' then the record will not be purged or changed.

## **Exporting NCOA Audit Table**

NCOA audit records are made up of the original values from your database, the changes made when the database was corrected and the changes that are suggested by NCOA.

NCOA Export	-				
Fields To Export	Types to Export				
I NCUA Values ●	O Just Nixies				
Corrected Values	O Just Matches				
Conecied values					
🗆 Include DNM records	in Export				
Export Header Row					
🗖 Surround Fields With	Quotes				
; Specify Delimiter					
Export Type: 3 Excel 97					
Export NCOA Audit Table	Cancel				

- 1) NCOA Values are the address updates due to moves. Original values are the addresses in your database prior to correction. Corrected Values are addresses changed by the correction/validation process.
- 2) These are the records to export. There are three types of records, those that matched and have a change of address (Matches), those that matched but do not have a change of address (Nixies). If you select all types it will select the nixies records and the matches.
- 3) This drop-down list will allow you to select the type of database to export these records into.

# **Activity Reports**

IA iAddress								_		×
File Address Management	Move Update Process N Process D Process D Export Mo View Mov Reports Undo Mo	Geocoding Nove Update NM Only eceased Only ove Update re Update Res	Presort	Print	Tools	Help		Copyright Flagship Sc [Data 1] CA: 07/14/ (M) [Data 2] CA: 08/18/ (M) US Correction/DPV: 06/15/ (M) US Lookup: 06/15/ (P) US Label Lists: 07/01/	oftware Ltd 20 Versio 2017 To 08/ 2017 To 09/ 2017 To 09/ 2017 To 09/ 2017 To 08/	000-2016 n 4.0.0 17/2017 14/2017 28/2017 30/2017 31/2017
	Account S Activity R NCOA Or	Status eport der Form		>	Canac U.S.	lian	<b>&gt;</b>	Summary 💦 1 Month Detail		^
								3 Month Detail 12 Month Detail		
										l

There are four types of reports currently available:

## **Monthly Detail / Summary**

Click on the report you wish to have displayed. This report will show the job dates, number of records processed, and the number of matched and nixie record.

## Geocoding

Geocoding will add location information to the data in your current job. The Geocoding menu option becomes available only after your job has been validated. The Geocoding screen has a few options for you to choose from.

For the first option, you may choose signed, or unsigned degrees.

C3, iAddress Geocoding	Х	C3, iAddr	ess Geocoding		×
Geocoding will determine the longitude and lat code in your mailing list. Enter a list of postal closest postal code and the distance re Generation Signed Degrees (e.g. 40.7486, -73.9864) Counsigned Degrees (e.g. 40°44'55''N, 73°50 Create a distance list	Geococ code i c C Sigr (• Uns	ting will determine n your mailing list. kosest postal cod ned Degrees (e.g. igned Degrees (e ate a distance list	the longitude a Enter a list of p e and the distan 40.7486, -73.90 a.g. 40°4455°N,	nd latitude of each postal ostal codes to have the ce results returned. 364) <u>73°5911'W</u> [	
PC Longitude Latitude	< Add Postal Code emove Postal Code(s) Add From File	PC	Longitude	Latitude	<< Add Postal Code Remove Postal Code(s) Add From File
Process	Cancel			Process	Cancel

After choosing the type of degrees, you may simply press "Process" to have iAddress<sup>™</sup> add the latitude and longitude information to your addresses.

As an additional feature, iAddress<sup>™</sup> can also use a list of Postal Codes<sup>OM</sup> and compare them to your addresses. iAddress<sup>™</sup> will return a list of the distance to the nearest Postal Code<sup>OM</sup> out of that list provided. You may add these Postal Codes<sup>OM</sup> from a separate file, or add them one at a time manually.

To do this, check the "Create a distance list" option. Next, type a Postal Code<sup>OM</sup> you wish to add to the list into the text box and click "Add Postal Code".

E3, iAddre	ss Geocoding			×	<	
<ul> <li>Geocoding will determine the longitude and latitude of each postal code in your mailing list. Enter a list of postal codes to have the closest postal code and the distance results returned.</li> <li>Insigned Degrees (e.g. 40.7486, -73.9864)</li> <li>Unsigned Degrees (e.g. 40°44'55''N, 73°59'11''W)</li> <li>✓ Create a distance list</li> </ul>						
PC L4E2J5 L4C8H7 L4B2J7	Longitude 43.95819 43.86155 43.86416	Latitude -79.47300 -79.43118 -79.40769	Re	< Add Postal Code ) move Postal Code(s) Add From File		
		Process		Cancel		

A distance list may be created based on multiple Postal  $Codes^{OM}$  as well. This feature could be used by businesses who have multiple business locations and they want to mail to the closest addresses. These Postal  $Codes^{OM}$  can also be added from a file. To do this, click the "Add from File" button.

🔄, iAddress Geocoding									
<ul> <li>Geocoding will determine the longitude and latitude of each postal code in your mailing list. Enter a list of postal codes to have the closest postal code and the distance results returned.</li> <li>C Signed Degrees (e.g. 40.7486, -73.9864)</li> <li>Insigned Degrees (e.g. 40°44'55''N, 73°59'11''W)</li> <li>✓ Create a distance list</li> </ul>									
PC	Longitude	Latitude		-					
L2E2J5	43.10560	-79.07655	<< Add Postal Code						
				<u>'</u>					
			Add From File						
		Process	Cancel						

Select your file.

🖏 Save Report							×
	~ Ū	✓ ♂ Search Test-Ref-Files					
Organize 🔻 New fo	older						?
Manual Edits	Name			Da	te modified	Туре	
My Screen Shots	en aaaN	ew_demo	bList-GEO	7/	21/2017 10:51 AM	PDF File	
Test-Ref-Files							
즑 OneDrive							
ocuments							
Email attachmer							
Pictures							
This PC							
Network	~ <						>
File <u>n</u> ame: aa	aNew_demoList						~
Save as <u>t</u> ype: Ad	lobe Acrobat *.p	odf					~
∧ Hide Folders					<u>S</u> ave	Cance	el:
🔄, iAddress Geocoding			×				
Geocoding will determine code in your mailing list. closest postal code	the longitude ar Enter a list of p e and the distan	nd latitude ostal code ce results	e of each postal es to have the returned.				
<ul> <li>Signed Degrees (e.g.</li> <li>Unsigned Degrees (e</li> </ul>	40.7486, -73.98 .g. 40°44'55''N,	364) 73°59'11'	wi l				
Create a distance list							
PC Longitude	Latitude						
L4E2J5 43.95819 L4C8H7 43.86155	-79.47300 -79.43118	( << Ac	dd Postal Code				
L4B2J7 43.86416	-79.40769	Remov	e Postal Code(s)				
,	P						
	Process		Lancel				

FLAGSHIP SOFTWARE LTD. MANUAL VERSION 4.0 | 108
When the desired selection has been made, click the "Process" button to process your file.

iAddress<sup>™</sup> will let you know when the Geocoding has completed.



To view the Geocoding results, click on the "View Database" option in the "File" menu.



The Geocoding process adds extra columns to your data. Scrolling to the right using the horizontal scroll bar you will eventually encounter these columns. The columns are:

- **FLG\_GEOLAT** The Latitude of the address' PC.
- **FLG\_GEOLONG** The Longitude of the address' PC.

If you Geocoded with a PC list you will also find:

- **FLG\_NEARESTPC** This is the nearest PC in the list to the address.
- **FLG\_DISTANCE** This is the distance from the address' PC to the nearest PC from the list.

IA Database V	ïew					- 0	×
<u>R</u> efresh	<u>S</u> earch	Delete	Lookup	Print Addr	esses <u>M</u> erge	Add Field	Close
C Valie	de .	C Uncorrer	ctable C	Duplicates	C Uncoded	All Fir	sids
( All	C Correct	ted	C Questionable	C Comm	ion		
~			·····				. 1
			Nex	t <u>Previ</u>		irst La	sj
Record Count:	5656	Job Name:	aaaNew_demoList	File:	C:\Users\bisma\Dov	nloads\Test-Ref-Files	\aaaNew_c
DNM CO	DES M	VUP CODES	FLG GEOLAT	FLG GEOLONG	FLG NEARESTPC	FLG DISTANCE	CAVA
•			44° 40' 46" E	63° 30' 7" S	L4E2J9	1274.311595	
			45° 20' 46" E	73° 16' 8'' S	L4E2J9	515.296199	
			43* 23' 39" E	79° 48' 14'' S	L4E2J7	68.196125	_
			46° 30' 24" E	84° 19' 43'' S	L4E2J9	474.92376	
			43° 17' 36" E	80° 26' 57'' S	L4E2J7	108.133636	
			51* 8' 34'' E	114° 14' 16'' S	L4E2J9	2707.371693	
			53° 32' 18'' E	113° 35' 37'' S	L4E2J9	2693.32727	
			45° 35' 37'' E	73° 35' 10'' S	L4E2J9	499.720661	
			45° 33' 28'' E	62° 39' 59'' S	L4E2J9	1339.745568	_
			47° 40' 22'' E	53° 11' 43" S	L4E2J9	2072.767837	
			47° 39' 47'' E	70° 9' 18'' S	L4E2J9	832.04545	_
			47° 44' 18'' E	53° 13' 39" S	L4E2J9	2070.593863	
			52" 59' 5" E	122* 30' 32'' S	L4E2J9	3280.808905	_
			52" 59' 5" E	122° 30' 32" S	L4E2J9	3280.808905	
			46" 50' 40" E	71° 23' 20'' S	L4E2J9	708.813146	
			45° 25' 49" E	72° 52' 4" S	L4E2J9	548.051217	
			49° 10' 3" E	122* 50' 37'' S	L4E2J9	3328.45287	
			45° 47' 6" E	72° 0' 49" S	L4E2J9	622.875799	
			48° 41' 49" E	71° 40' 23" S	L4E2J9	797.882449	
			45° 1' 1'' E	75° 38' 48'' S	L4E2J9	325.9984	
			52* 52' 33'' E	118° 5' 18'' S	L4E2J9	2983.343721	
	1		15° 17' 54" F	72* 12 22" 9	11 15219	517 222817	

After you have your Geocoded results, you can use the filtering tool for targeted mailings. Under the Address Management menu, click on Filter Mailing, and choose the Geocode Filter:

On this tab you can remove records from your database based on three options:

- Remove the records that did not Geocode.
- Remove records based on the distances that were generated from your distance list.
- Remove a number of records starting from those closest or farthest away from the Postal Codes<sup>OM</sup> in your distance list.

You can also view your geocoding report by clicking "Report" in the geocoding menu.

IA	iAddress							– 🗆 X
File	Address Management	Move Update (NCOA)	Geocoding	Presort	Print	Tools	Help	
۵	FLAGS SOFTWARE	Record	Run Ge Report Jadane	eocoding	કા			Copyright Flagship Software Ltd 2000-2016 Version 4.0.0 [Data 1] CA: 07/14/2017 To 08/17/2017 (M) [Data 2] CA: 08/18/2017 To 09/14/2017 (M) US Correction/DPV: 06/15/2017 To 09/28/2017 (M) US Lookup: 06/15/2017 To 09/30/2017 (P) US Label Lists: 07/01/2017 To 08/31/2017
[201 [201	7-07-21 10:49:54] Job 1 - Ge 7-07-21 10:49:55] Job 1 - Ge	ocoding started at: ocoding ended at:						

Your report will look something like this:

iAddress Geocoding Report							
Processed Addresses 5656 Non-Geocoded 6 Geocoded 5650							
Minimum Average Maximum	0.619 k 1396.595 k 4196.576 k	m m m					
Postal Code	Percent*	Count	Minimum Distance	Average Distance	Maximum Distance		
L4E2J5	63%	3546	1.42 km	1942.496 km	4196.576 km		
L4B2J7	27%	1536	1.088 km	613.183 km	2109.166 km		
L4C8H7	10%	568	0.619 km	107.078 km	357.634 km		

#### Presort

### **Validation Report**



C3, Validation Report							×
- Customer Information Customer Name (Your Company Name)			Mailing on Be	ehalf Of			
Flagship Software LTD.			Lady Fab			-	
Customer Number (Your number)			Customer's C	PC Number			
Customer Num			7894562				
Date of Mailing			Office of Dep	posit			
2017-08-21		]	MISSISSAU	GA ON			
Validation Report		Corrected R	leport	ι	Incorrectable	e Report	
Job Name:				aaaNev_dem	oList		^
Software & Version Number	:			iAddress V	ersion 2	2014	
Customer Name: Customer Address:				Flagship S 203-60 Kin Richmond H	oftware g Road ill ON	LTD. L4E2J4	
Customer Telephone Number Customer Number: Mailed on Behalf Of: Customer Number: Date of Mailing Selected:	:			(416) 410- Customer N Lady Fab 7894562 2017-08-21	6357 um		
Expiry Date of Delivery M Serial Number of Delivery	ode Dat Mode I	ta CD: Data CD:		2017-09-14 P310202556	1101		
Options:		Upper Two L:	Case ine				~
Print Validation Report		<u>S</u> ave to	o File				
View Corrected View Uncorrecta Addresses Addresses	ible F	Filter Records b, Type	y Correction e		Print All	Save	; All
Do NOT display this window after the	correction	completes.				Close	

#### **Mailing Plan**

The Mailing Plan menu option generates a Canada Post specified mailing plan that can be imported into the Canada Post Electronic Shipping Tools through the online and desktop versions. This file contains the required data to populate the electronic Statement of Mailing.

After selecting Mailing Plan from the Presort menu you will be prompted to choose the directory in which you wish to save the file. (Note: The file should be saved in a folder that is accessible to the operator who submits the electronic Statement of Mailing)



#### **Print All Reports**

#### Video

After running the Presort function, several reports are produced. Several options are available to print these reports.



Selecting the Print All Reports option will produce the Statement of Mailing, Container/Bag and Bundle Report, as well as the Delivery Office Volume Summary. These reports can also be printed individually, by selecting the appropriate report from the Presort menu. The Validation Report is included on this screen should you wish to print or reprint this report.

#### **Statement of Mailing**

The Statement of Mailing Report is described in detail in the Sortation section of this manual. However, should you need to access it after your initial sort, you can do so from the Presort -> Statement of Mailing menu option.



#### The Container/Bag and Bundle Report

The Container/Bag and Bundle Report contains information about each container, bag or bundle, and its contents. You can access this report from the Presort menu.



Print the report by clicking the Print button or save the report to a text file.

Some Canada Post RVUs require this report. Please check with your local RVU (Office of Deposit) for its reporting requirements.

To print this report for your records, click "Print".

#### **Office Volume Summary**

Your Canada Post RVU may require the Delivery Office Volume Summary report. You can access this report from the Presort menu.



It describes the destination of the containers or bags in your job. Please check with your local RVU (Office of Deposit) for their reporting requirements.

### **Print All Labels**

#### Video

Once the Sort is complete, you have several options for printing labels and reports. These options are available from the Presort menu.



#### **Print All Labels**

By selecting this option, you can print all labels at once. This option is not recommended unless you are printing all labels to blank, non-perforated paper.

### **Container/Bag Labels**

After your job has been sorted, you can view and print your container or bag labels in PDF using this option. A sample container label appears below.



**Bundle Labels** 

You can view and print your bundle labels in PDF using this option. A sample bundle label appears below.



#### **Monotainer/ Pallet Labels**

You can view and print your Monotainer/Pallet labels in PDF using this option. A sample monotainer label appears below.



Sort

#### Video

The Sort function performs presort processing on your job, grouping mail by postal code and placing mail into containers as required, to take advantage of discounted postage rates.



Select "Sort" from the Presort menu. The following screens will appear.

Select the mailing date of the sortation.	Select the type of sortation for this job
Mailing Date 07/04/2016 You have 7 days to deposit your mail. (due Apr 14, 2016)	<ul> <li>Personalized Mail (SH) (Formerly Addressed Admail)</li> <li>Personalized Mail Machineable</li> </ul>
Template New Template   Delete	C Personalized Mail Machineable Labels Only
Customer Flagship Software	C Publication Mail (SH) (Formerly LCP)
Tax Rate 0 Reference	O Publication Delivery Facility Presort (Formerly NDG)
Addresses Included in Sort	C Publication Mail Machineable
I Uncorrectable IV Hetired Postal Code ↓ Questionable Uncoded as residue	C Incentive Lettermail (LCP)
▼ Split large bundles (S/L > 100 mm and 0/S > 200 mm)	Process non-qualified as Machineable     O Incentive Lettermail Machineable
Do Phantom Mailing Advanced Options	C Incentive Lettermail Machineable Labels Only
<u> N</u> ext > Done Cancel	< Back Next> Done Cancel

Select the office of deposit of your mailing.	Choose the filename for your mailing plan and printing options.
	C:\Program Files (x86)\iAddress\test\MSAccess.zip Browse Labels
Office of Deposit Postal Code PC Office of Deposit Site Number	Not printing or saving labels
List	Reports D0 N0THING Options Options
	Prefix files with (optional)
	Save template
<u> &lt; B</u> ack <u>Next</u> > Done Cancel	Kext>         Done         Cancel

When all information has been correctly entered, click "Process".

If you perform the same sort on a file on a regular basis, you can save the details as a template. Select the correct settings and click "Save Template".

### Palletization/ Monotainers/ Brick Piling

Additional information is required when using pallets, monotainers or brick piling. You will be prompted to enter the length and width characteristics of your mailing if you choose one of these options.

#### **Resort a Job**

If you wish to compare different sortation methods for your job, or if you made a mistake, you can select "UnSort" from the Presort menu. This will allow you to resort your job with different options.

#### **Statement of Mailing**

The Statement of Mailing Report must be provided to Canada Post. It contains all the information required by Canada Post to verify your mailing. After selecting this report, you should verify the company information displayed. Any changes you make to this screen are temporary. To make permanent changes to the information on this screen, you must enter it from the Company Information screen on the File menu.

The next page has an example of how a Statement of Mailing might appear.

Customer Information		I
Customer Name (Your Company Name)	Mailing on Behalf Of	View Uncoded
Company Name		Delete Uncoded
Customer Number (Your number)	Customer's CPC Number	
Customer Num		Print
Office of Deposit	· · · · · · · · · · · · · · · · · · ·	Print All Reports
AURORA ON	Tax at 0	Save to <u>F</u> ile
Do not display this window after the sortation completes		<u>C</u> lose
Statement of Mailing		
_		
******	Important! ************************************	******
It is mandatory to upload the Mailing	Plan into EST for LCP Addressed Admai	l and
LCP Publications Mail. LCP Addressed A	Admail and LCP Publications Mail induc	ted .
without the required Mailing Plan file	e uploaded to EST will be subject to a	surcharge
or sulus per piece on the entire mail:	ing upon induction at the RVUS.	
The surcharge for this mailing would 1	be approximately \$499.75	т
***************************************	***************************************	****
Job Name: MSAccess		
Input File: C:\Program Files\iAddress`	<pre>\test\MSAccess.mdb</pre>	
Custonen Nana	· Company Nama	
Customer Name	: Company Mame : 123 Main Street	
Customer Telephone Number	· (111) 222-3333	
Customer Number	: Customer Num	
Software & Version Number	: iAddress - Version 4 SERP Recogn	ized
SERP Expiry Date	: 01/13/2012	
Database Valid From  Daliment Wede Judit Code	: U5/13/2U11 To U6/16/2U11	
ISerial Number of Delivery Mode Data Cl	D P3102025561101	-
Correct manabol of portionly mode bata of		· · ·

This report summarizes information on your mailing including specific data required by Canada Post for logistics purposes. It also lists the number of bundles, containers, and pallets or monotainers in your job.

#### **Uncoded Pieces – Addressed Admail and Publications Mail**

Uncoded pieces in an Addressed Admail or Publications Mail job are addresses either missing a Postal Code<sup>OM</sup> or containing an invalid Postal Code<sup>OM</sup>. These pieces MAY NOT be included in your sorted job. They can be mailed separately via First Class mail or can be deleted from your job completely. To export the uncoded addresses before deleting them from your job, select the Export Database option form the File menu and click the Uncoded Addresses option. To delete the uncoded addresses from your job click the Delete Uncoded button on the Statement of Mailing screen.

#### **Uncoded Pieces – Transactional Mail**

Uncoded pieces in a Transactional Mail (Incentive Lettermail) job are pieces that did not qualify for incentive rates under the density requirements. These pieces must be mailed at first class rates. You can export these addresses using the Export Database option from the File Menu and clicking the Uncoded Addresses option Your Address for Printing option from the main menu and clicking the Uncoded Addresses option. If you choose to keep the uncoded addresses in your job, they will be listed before the sorted records.

Specify the dimensions of your piece and specify container and bundle maximums.						
Mail Characteristics          Image: Mail Characteristics         Image: Meight/Thickness         Thickness         Image: Meight mm         Length         Image: Meight mm						
Max. # of Pieces in a Bundle: 8						
Max. # of Pieces in a Container:						
Save template						
< <u>B</u> ack <u>N</u> ext > Done Cancel	1					

#### Variable Weight/Thickness

This feature, found under the "Presort" menu, allows you to check the variable weight/thickness box so you do not have to input information every single time you run a job. The thickness and weight information should be written in the document used for the job so the software can automatically read it and apply the changes.

# Print

### **Exporting Addresses for Printing**

To export your addresses, select Export Addresses for Printing from the Print menu.



By selecting Export Database from the File menu or Export Addresses for Printing from the Print menu, the following screen will appear:

🛢, Export Database	X	🛎 Export Database	X
Export:	Extra Control Fields     Choose Fields     Add Original Address Fields	Export:	Extra Control Fields     Choose Fields     Add Original Address Fields
	✓ Include all other fields from original database		Include all other fields from original database
Uncoded Addresses Canadian Only Foreign Addresses Questionable Addresses Only sorted records Unsorted records to the end Export in Reverse Sort Order	<ul> <li>Include the Audit Log</li> <li>Add Leading Zeros to ListOrder</li> <li>Add Correction Fields</li> <li>Add Status and Comment</li> <li>Add Address Components</li> <li>Choose Export Fields</li> <li>Edit Fields</li> <li>Export Type</li> <li>Tab Delimited</li> <li>✓ Surround all fields With Quotes</li> </ul>	Uncoded Addresses Canadian Only Questionable Addresses Only sorted records Unsorted records to the end Export in Reverse Sort Order	<ul> <li>Include the Audit Log</li> <li>Add Leading Zeros to ListOrder</li> <li>Add Correction Fields</li> <li>Add Status and Comment</li> <li>Add Address Components</li> <li>Choose Export Fields</li> <li>Edit Fields</li> <li>Export Type</li> <li>Tab Delimited</li> <li>✓</li> <li>Surround all fields With Quotes</li> </ul>
Export in Reverse within Bundles		Export in Reverse within Bundles	
	Exported French Accented Characters Options Windows (Ansi) (Code Page 1252) Dos (Dem) (Code Page 427)		Exported French Accented Characters Options Windows (Ansi) (Code Page 1252) Dos (Dem) (Code Page 427) Jobs to Export Automation Pieces Pieces
Export Database	Export <u>SQL</u> Updates <u>C</u> ancel	Export Database	Export <u>S</u> QL Updates <u>C</u> ancel

You may now select which addresses and/or additional fields you wish to export.

- **Only sorted records:** Records which have been sorted.
- **Unsorted records to the end:** Records that have not been sorted appear at the beginning of the file.
- **Extra Control Fields:** Fields created by iAddress<sup>™</sup> during correction/validation, duplicate extraction, genderization, and sortation.
- Add Original Address Fields: Permits you to see the original state of your address fields as well as any corrections or changes
- **Include all other fields from original database:** Permits you to export additional fields contained in the original database (for example: customer numbers, phone numbers, etc.).

After selecting your options, click Export Database. The following screen will appear, prompting you to provide a filename and location for your exported information.

Save As						? ×
Save jn:	iest 🔁		•	+ 🗈 💣 🛛	•	
My Recent Documents Docktop	Test.tab					
My Documents						
My Computer						
My Network Places	File <u>n</u> ame: Save as <u>t</u> ype:	Test.tab Text Files (*.tab)		•	C	Save

🖷, Export Database	×	🗃 Export Database	X
Export:	Extra Control Fields     Choose Fields     Add Original Address Fields     Include all other fields from original database	Export:	Extra Control Fields     Choose Fields     Add Original Address Fields     Include all other fields from original database
Uncoded Addresses Canadian Only Foreign Addresses Questionable Addresses Only sorted records Unsorted records to the end Export in Reverse Sort Order	<ul> <li>Include the Audit Log</li> <li>Add Leading Zeros to ListOrder</li> <li>Add Correction Fields</li> <li>Add Status and Comment</li> <li>Add Address Components</li> <li>Choose Export Fields</li> <li>Edit Fields</li> <li>Export Type</li> <li>Tab Delimited</li> <li>Surround all fields With Quotes</li> </ul>	Uncoded Addresses Canadian Only Questionable Addresses Only sorted records Unsorted records to the end Export in Reverse Sort Order	Include an other fields from original database Include the Audit Log Add Leading Zeros to ListOrder Add Correction Fields Add Status and Comment Add Address Components Choose Export Fields Edit:Fields Export Type Tab Delimited Surround all fields With Quotes
Export in Reverse within Bundles	Exported French Accented Characters Options	Export in Reverse within Bundles	Exported French Accented Characters Options Windows (Ansi) (Code Page 1252) Dos (Dem) (Code Page 427) Jobs to Export Automation Pieces Pieces
Export Database	Export <u>S</u> QL Updates <u>C</u> ancel	Export Database	Export <u>S</u> QL Updates <u>C</u> ancel

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- **Extra Control Fields:** Fields created by iAddress<sup>™</sup> during correction/validation, duplicate extraction, genderization, and sortation.
- Add Original Address Fields: Permits you to see the original state of your address fields as well as any corrections or changes
- **Include all other fields from original database:** Permits you to export additional fields contained in the original database (for example: customer numbers, phone numbers, etc.).

After selecting your options, click Export Database. The following screen will appear, prompting you to provide a filename and location for your exported information.

Save As						<u>? ×</u>
Savejn:	🗀 test		•	+ 🗈 💣	•	
My Recent Documents	Test.tab					
My Documents						
My Computer						
My Network Places	File <u>n</u> ame: Save as <u>ty</u> pe:	Test.tab Text Files (*.tab)		▼ ▼		<u>S</u> ave Cancel

# **Windows Printing**

The Windows Print option allows you to design and print address labels using Avery Denison© label templates. Select Windows Print from the Print menu.



The following layout screen will appear:

Windows Print	×
_abel Forms Avery Standard   Properties	Preview One Label
196 (8163 Shipping Labels)	
Text5 Indicia Picture IMB	
Text1 Text2 Text3 Text4	Saranac Lake NY 12983
Add Field Left: 0.01 in Top: 0.01 in A	
< <oel>&gt; ^</oel>	
< <add2>&gt; &lt;<city>&gt; &lt;<prov>&gt; &lt;<zip>&gt;</zip></prov></city></add2>	
~ · · · · · · · · · · · · · · · · · · ·	
< >	<u> </u>
New Template  Save Delete  Test for T	Truncation on Erint

Text boxes, indicias and graphics must be sized on the appropriate tab. The coordinates entered on each tab determine their position. You can see one page of labels or see an individual label by clicking the One Label tab.

A text box (Text1) containing the address information from your job will automatically be produced. Text2 will contain the Bag/Bun information if you have run a sort. You can add up to three more text boxes that can contain fields from your database or text that you type in.

#### Adding an Indicia

To add an indicium to your label, click the Indicia tab. Select the type of mailing from the drop down menu. Enter the customer number, size and position where required.

#### **Adding a Graphic**

If you would like to add a graphic to your label, click the Picture tab. Click the Insert Picture tab and browse until you locate your file. Enter the size and position of the graphic where indicated.

# **Dos Printing**



The following screen will appear:

IA DOS Print Labels S	etup		– 🗆 X
- Select Left Fields			Select Right Fields
Address	1 ADD 🗸	<b>_</b>	<b>_</b>
	2 ADD2 👻		
		<b>_</b>	
	5 🔹	•	<b>–</b>
		<b>_</b>	<b>_</b>
	7		
Clear All Mapped Fields		<b></b>	
		<u> </u>	
Record Number	1	<u>S</u> earch	Sort <u>O</u> rder
5062 State Route 3	30		~
Saranac Lake NY :	12983		
<			>
•			►
Characters Per Inch • 10 0 12 0 17 Lines Per Inch • 6 0 8	Label Setup       Top Margin (# of lines)       Lines Per Label       Label Width       Labels Across (1 to 4)	el Starting Position 1 3 101 51 4 151	uble space between Prov HPC lude Uncoded
Print Print	Current New Template	Save D	elete <u>C</u> ancel

Enter the required information and select Print. The following screen will appear:

DOS Printing			×
Canon MX350 series	⊧ Printer WS	•	1
Print Start	<u> </u>	Forward	<u>I</u> est Print
Print End	2539	Reverse	<u>P</u> rint
Print Type	No Driver		Print to Spool
(● Ink <u>J</u> et	C Epson	<ul> <li>ANSI</li> </ul>	Print to <u>F</u> ile
C Continuous Form	Compress	O OEM	Delimit Character
			Cancel

Ensure the settings are correct for your printer and click Print. If you wish to enter your settings directly on the printer, select Ink Jet/No Driver.

## Tools

# **Acronyms and Genderization**

To view a database, click on either Acronyms or Gender in the Tools menu.



A view of the database appears

3. View Acronyms	_	$\times$
short	long	
A/D	Analog To Digital	_
A/UX	Apple's Unix For Mac	_
AA	Administrative Assista	
ΑΑΑ	American Automobile	
AAP	Affirmative Action Pro	
ABA	American Bar Associ	
ABC	American Broadcasti	
ABEL	Advanced Boolean E	
ABEND	Abnormal End	
ABHC	Average Busy Hour (	
ABS	Antilock Braking Sys	
ABSBH	Average Busy Seasc	
ACCT	Account	
ACHEFT	Automated Clearingh	
ACLU	American Civil Liberti	
ACWP	Actual Cost Of Work	
ADCI	Automatic Display Ca	
ADD	Attention Deficit Disc	
ADMD	Administrative Manag	
ADMR	Administrator	
ADSL	Asymetrical Digital St	
ADT	Atlantic Daylight Tim	
AF	Air Force	
AFB	Air Force Base	
AFC	American Football Cc	
AFL	American Football Le	
AG	Attorney General	
AGAFC	Agriculture and Agrif	-

To add your own acronyms or names, choose the User Acronyms or User Gender and enter information into the fields.

## **Postal Rates**

You may view the current postal rates by selecting "Postal Rates" from the Tools menu.

IA iAddress						-		×
File Address Management Move Update	Geocoding	Presort Print	Tools	Help		_		
	Job Name:			CA Unaddressed 2D Barcode (C73) Encode/Decode IMB Acronyms		Softwar 1/2017 3/2017	∍ Ltd 200 Version To 08/17 To 09/14	0-2016 4.0.0 7/2017 4/2017
				Jser Acronyms Gender Jser Gender		5/2017 5/2017 /2017	To 09/28 To 09/30 To 08/31	3/2017 3/2017 1/2017
			(	QR Code Campaign	>			
			l l	Postal Rates	>	C	Canada P	ost 🔓
			i	Fuse Reports		ι	ISPS	Ŭ
			1	Download Updates				
								~

Select the rate you wish to view by clicking on the appropriate tab. You can also set the date for the pricing from the date box.

# iFuse (Canada Only)

iFuse is located in the tools menu of iAddress™.

IA iAddress					-	-		×	
File Address Management Move Update	Geocoding	Presort Print	Tools	Help					
	Job Name:		E	A Unaddressed 2D Barcode (C73) ncode/Decode IMB	5	oftwar /2017	re Ltd 20 Versior 'To 08/1	00-2016 14.0.0 7/2017	
SOFTWARE . LTD	SOFTWARE + LTD	I	I	A	kcronyms		/2017	To 09/1	4/2017
			U G U	lser Acronyms iender Iser Gender	j	/2017 /2017 /2017	To 09/2 To 09/3 To 08/3	:8/2017 :0/2017 :1/2017	
			C P	)R Code Campaign Iostal Rates	> >			^	
			iF	Fuse Reports					
			D	ownload Updates					

It can be accessed whether you have a job currently open or not. If you have a job open and you select iFuse Reports then it will prompt you asking whether you would like to include the job you have open as one of the jobs in your fusion.



If you select yes then you will go through the save job process and then iFuse will launch.

iFuse Version 1.0.32		—		$\times$
File Name	Status	5		0
C:\Users\Admin\Downloads\aaaNew_demoList.pjf	Corrected			
		(Ac	dd Jobs to	List
		Ad	d Recent.	Jobs
		Remo	ve Jobs Fi	rom List
			Next>>	
			Exit	

iFuse works by selecting multiple iAddress<sup>™</sup> jobs and creating a series of merged reports. To select a job or series of jobs to include in the fusion select the "Add Jobs to List" button located in the top right.

There are no restrictions on the jobs that can be included in the list, however, the jobs need to have similar qualities to be able to create a combined report from them.

There are 3 combined reports we create, the validation report, the statement of mailing and the mailing plan (for upload to Canada Post). The validation report has the least restrictions, it only requires the the jobs be corrected. The statement of mailing and the mailing plan require that the following parameters match between jobs:

- Mail on behalf of name, address and number
- DMD dates (i.e. sorted using the same data)
- Deliver Mode Audit Code (same as the dates, we require the same data be used)
- Office of Deposit (All your mail needs to be dropped off at the same place)
- Mailing Date (All your mail needs to be dropped off on the same day)
- Piece Type (No mixture of letter and oversized)
- Container Type (Essentially the same type of sort is being done on different jobs)
- Tax Rate

To generate the reports you click the "Next" button and you will see the report selection screen.

🔄, Statement of Mailing Setup	×
Create a combined Mailing Plan File	
	Browse
Create a combined Statement of Mailing	
	Browse
Create a combined Validation report	
C:\Users\Admin\Downloads\aaaNew_demoListValidation.pdf	Browse
Cancel	erate >>

By checking or un-checking the report boxes you can choose to produce some or all of the reports. The filenames are the names of the reports that will be created.

# Label2CSV (Canada Only)

Label2CSV is a stand-alone utility designed to convert label files to .csv files. These .csv files can then be used to create mailings with iAddress<sup>™</sup>. Label2CSV can also be used to clean files in .csv format. This is useful if you have a file with address components scattered across a record, rather than consistently placed within fields.

This is an example of a label file:

JOHN SMITH 100 MAIN STREET TORONTO, ONTARIO M2N 1N5 CINDY SMITH 15 DOVER ROAD BURNABY, BRITISH COLUMBIA V2T 1T2 RODNEY SMITH 38 RIVER LANE HALIFAX, NOVA SCOTIA B7T 8A9 To convert a label file to a .csv, select Programs/iAddress<sup>™</sup>/Label2CSV from the Start bar. The following screen will appear:

Label2CSV / FixCSV	
<u>File A</u> bout	
Label2CSV	Each Label uses 5 lines
Do FixCSV after conversion	
<u> </u>	

After clicking the "Label2CSV" button, you will be prompted for the directory containing the label format file.

After selecting the appropriate file, click "Open". You will then be asked for a file name and location for the resulting .csv file. Enter this information and click "Save".

By default, the "Do FixCSV after conversion" is checked. When this feature is enabled, the utility attempts to identify address lines, city, province and Postal Codes<sup>OM</sup>, and place them in the first five columns of the resulting .csv file.

#### For non-label format files

To use this utility for a non-label format file, the file must first be saved in .csv format. This can be done using a "Save As" with the program the file was created in.

After opening the Address Miner, click the "FixCSV" button. You will be prompted for the filename and its location. After supplying this information, you will be prompted for the filename and location of the resulting .csv file.

#### **Address Miner**

Address Miner is a more complex version of the FixCSV option using Canada Post data and more advanced algorithms.

### **Downloading Updates**

Registration is successfully completed, you can download the latest databases by choosing "Download Updates" from the "Tools" menu.

IA iAddress		- 🗆 X
File Address Management Move Update Geocoding Pres	rint Tools Help	
	CA Unaddressed 2D Barcode (C73) Encode/Decode IMB Acronyms	oftware Ltd 2000-20 Version 4.0.0 72017 To 07/13/201 72017 To 08/17/201
	User Acronyms Gender User Gender QR Code Campaign	i/2017 To 09/28/201 i/2017 To 08/31/201 /2017 To 07/31/201
	Postal Rates > iFuse Reports	
	Download Updates	ļ

From the "Download Updates" window click "Download".

Download Updates - iAddress	-		×
About			
Subscriptions			
AddressMinerPRO	Expires:	2018-07	-01
CA Geocoding	Expires:	2020-12	-31
Citilogistics Filter	EXPIRED:	2017-07	7-01
iAddress ACV CA	Expires:	2020-02	2-10
iAddress Canadian DNM	Expires:	2018-05	5-01
iAddress FULL CA	Expires:	2020-05	5-16
iAddress Full US	Expires:	2099-01	-01
iAddress Sort CA	Expires:	2020-02	2-10
iAddress US NCOA	Expires:	2024-01	-01
iFuse	EXPIRED:	2017-07	7-01
Postal Code Mail	Expires:	2030-01	-01
QR Code Module	Expires:	2099-06	5-16
Test iAddress CA Full	Expires:	2020-01	-15
truxDevCmp	EXPIRED:	2017-07	7-01
iAddress Canadian NCOA	Expires:	2099-02	2-01
	/		
Download 🗌 🗖 Secure Mode (	Slower)	Exit	

The "Available Data Files" window will appear. Select "Download updates only" to download and install any software updates for iAddress<sup>TM</sup>. Otherwise, select the appropriate data and click "Ok"

Available Data Files	×
The following data files are available for download. Select the data sets to do	wnload.
Download updates only	^
2017-06-16 - 2017-07-13 CA Correction 2017 Jun-Jul     2017-06-16 - 2017-07-13 CA Full 2017 Jun-Jul     2017 06-16 - 2017 07-13 CA Full 2017 Jun-Jul	
2017-06-16 - 2017-07-13 CA Sort 2017 Jun Jul 2017-07-14 - 2017-08-17 CA Correction 2017 Jul Aug	~
<u>K</u>	Cancel

Update	×
Download comp	lete.
0	(

When the download is complete, iAddress<sup>™</sup> will be shut down to complete the update. You will be prompted to save any unsaved work.

#### Note:

It can take a few minutes to decompress the data files.

When the update is complete, iAddress<sup>™</sup> will be restarted.

For your convenience, here is the download link from which to download the iAddress<sup>™</sup> software:

www.flagshipsoftware.com/iaddress-setup.exe

### **QR CODE CAMPAIGN**

Flagship Software offers the QR Code utility; a quick and easy way to enhance and track the performance of your marketing campaigns. iAddress<sup>™</sup> will enable you to print a QR Code on your advertising piece which will gather data to enable trackability and the response of the open rate of your marketing campaign.

Image: Address       Address         File       Address Management       Move Update (NCOA)       Geocoding       Presort       Print         Record Count:       5656         Job Name:       JaaaNew_demoList	Tools Help CA Unaddressed 2D Barcode (C73) Encode/Decode IMB Acronyms User Acronyms Gender User Gender QR Code Campaign Postal Rates iFuse Reports Download Updates	Id         2000-2016           ersion         4.0.0           10/12/2017         10/12/2017           10/12/2017         09/30/2017           09/30/2017         Og/30/2017           View Ca         QR Encode	e QR Code Campaign mpaign Reports ode Existing Field	
	Download Updates			

If you click "Mange QR Campaign" you can keep track of all your campaigns and create new campaigns on this screen:

🔄, Create QR Code Campaign		×
- Create A New Campaign User Defined ID (Optional)		
1		
URL for Campaign		
Test URL	Characters Remaining	
	Create Campaign Close	e

You can view reports when you click on "View Campaign Reports" a screen will appear:

5. Form1				-		×
User Defined ID Search	Campaign ID	User Defined ID	URL Link			×
				Export		Cancel

When you click "QR Encode Existing Field" you can manage your current campaign by adding variable or static data and a QR code line separator if you wish on this screen:

🔄, Create QR Code Campaign				$\times$
- Manage Current Campaign				
Variable Data			EIRST NAME	<u> </u>
				- ^
1				-
Static Data			ORIGADD	-
			ADD	-
			ORIGADD2	-
			ADD2	-
			ORIGCITY	-
			CITY	
			ORIGPROV	
			PROV	
			ORIGPC	_
			PC	~
J			< >>	
	QR Code Line Separator	Encod	de Data Close	
## CA unaddressed 2D Barcode (C73)

You can create a unaddressed 2D Barcode by going to the "Tools" menu and clicking on "CA unaddressed 2D Barcode (C73)".

IA iAddress	_		×
File Address Management Move Update (NCOA) Geocoding Presort Print Record Count: 5656 Job Name: aaaNew_demoList	Tools       Help         CA Unaddressed 2D Barcode (C73)         Encode/Decode IMB       \$\$         Acronyms       \$\$         User Acronyms       \$\$         Gender       \$\$         User Gender       \$\$         QR Code Campaign       \$\$         Postal Rates       \$\$         iFuse Reports       \$\$	.td 2 jersi ) 09 ) 10 ) 11 ) 09 ) 09 ) 09	2000-2016 ion 4.0.0 )/14/2017 )/12/2017 /28/2017 )/30/2017 )/30/2017
	Download Updates		

Fill in all your information in the fields below and click "Process"

🖏 Postal Code Mail Encoder			- (	⊐ ×
Canada Post Postal Code Mail file	l			
Encoded Postal Code Mail output file				
		Process		Cancel

## **Help Menu**

**Welcome to the help menu!** If you click "Help Content" it will bring you to this online manual. The online manual can be used to solve problems which do not require customer support.

IA iAddress								_			×
File Address Management Move Update	Geocoding Job Name:	Presort	Print	Tools	Help	Help Content Newsletter Email Support Remote Suppo Version Re-register	rt	t Flagship So ] CA: 07/14/ ] CA: 08/18/ DPV: 07/15/ hkup: 06/15/ Lists: 07/01/	ítwar 2017 2017 2017 2017 2017	e Ltd 201 Version To 08/1 To 09/1 To 10/2 To 09/3 To 08/3	00-2016 4.0.0 7/2017 4/2017 8/2017 8/2017 0/2017 1/2017
						About					^

Our newsletter is available in the help menu, simply click "Newsletter". We publish our newsletter monthly. It contains news about all our software updates and more. The newsletter is available both in English and French. Enjoy!



If you would like support via email click "Email Support". A window will pop up and you can simply fill out the form and send an email to our support staff.

File       Address Management       Move Update       Geocoding       Presort       Print       Tools       Help         Image: Solution of the second seco
Job Name:         Help Content         Flagship Software Ltd 2000-2016           Newsletter         Version 4.0.0           CA: 07/14/2017 To 08/17/2017           CA: 08/18/2017 To 09/14/2017           Version           Re-register           About

IA iAddress		– 🗆 X
File Address Management Move Upd	Email Support     Print Tools     Help       From:	Copyright Flagship Software Ltd 2000-2016 Version 4.0.0 [Data 1] CA: 07/14/2017 To 08/17/2017 (M) [Data 2] CA: 08/18/2017 To 09/14/2017 Correction/DFV: 07/15/2017 To 10/28/2017 (M1US Lookur: 06/15/2017 To 10/28/2017
	Reply by: Email	() US Label Lists: 07/01/2017 To 08/31/2017

If you would prefer to receive remote support. Please click "Remote Support". A window will pop up containing a code which you will need to provide to our support staff so they can remote into your computer and help you.



If you would like to know the version of your software, please click "Version". A window will pop up, here you can see the version of each program you have on your device.

iAddress				_		;
Address Management Move Undate	Geographica Dresort	Drint Tools Hal			_	
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			Version	Lists: 07/01/2	2017 To 08/	31/
			Re-register			
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iAddress Address Management Move Update	Geocoding Presort	Print Tools Help	,	— Copyright Flagship Sol	Itware Ltd 21	000
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Address Management Move Update Version Details	Geocoding Presort           Version           1.0.0.6           1.0.0.3           3.0.0.19           2.0.0.22           2.0.0.27           1.0.0.3           1.0.0.5           1.0.0.11           1.0.0.109           1.9.0.0           4.0.396	Print Tools Help Path C:\Program File C:\Program File	s (x86)\iAddress\A s (x86)\iAddress\iA s (x86)\iAddress\iA s (x86)\iAddress\iA s (x86)\iAddress\iA s (x86)\iAddress\G s (x86)\g s (x8		itware Ltd 21 Versic	000 on 4

To re-register your information please click "re-register". A window will pop up, you must simply fill out the form and submit.

IA iA	Address							_		$\times$
File	Address Management	Move Update	Geocoding	Presort	Print	Tools	Help			
S.	FLAGS SOFTWARE	HIP • LTD	Job Name:				Help Content Newsletter Email Support Remote Support	t Flagship Softwa CA: 07/14/2013 CA: 08/18/2013 DPV: 07/15/2013	re Ltd 200 Version 7 To 08/1 7 To 09/1 7 To 10/2	00-2016 14.0.0 7/2017 4/2017 18/2017
							Version	okup: 06/15/2013	' To 09/3	0/2017
							Re-register	Lists: 077017201	10 08/3	172017
-							About	3		
IA iA	Address							_		×
File	Address Management	Move Update	Geocodina	Presort	Print	Tools	Help			
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4		Company	Name					ion/DPV: 07/15/2017	To 10/2	8/2017
		Contact N	ame					Lookup: 06/15/2017	To 09/3 To 08/3	0/2017
		Contact e	mail					2001 21010. 011 011 2011	10 00/0	
		Address 1								^
		Address 2								
		City								
		Province/	State			-				
		Postal Cod	de/ZIP		í –		_			
		Serial Nun	nber							
		Register	Offline		Submit	:	Cancel		2	l

If you would like to know more information about iAddress<sup>™</sup> please click "About". Here you can read about iAddress<sup>™</sup> in the pop up window in both English and French.

IA iAddress							_			×
File Address Management Move Update G	eocoding	Presort	Print	Tools	Help					
FLAGSHIP SOFTWARE • LTD	Job Name:					Help Content Newsletter Email Support Remote Support Version Re-register	t Flagship So ] CA: 07/14/ ] CA: 08/18/ DPV: 07/15/ okup: 06/15/ Lists: 07/01/	oftwar /2017 /2017 /2017 /2017 /2017	e Ltd 200 Version To 08/1 To 09/1 To 10/2 To 10/3 To 08/3	00-2016 4.0.0 7/2017 4/2017 8/2017 0/2017 1/2017
						About				



## U.S.A

# Sorting your U.S Mail

# **U.S. Sortation**

The sort function will perform presorting on your mailing to take advantage of bulk rate discounts with USPS.



The following screen will appear. When all the steps are completed, iAddress<sup>™</sup> will sort your mailing.

US Presort Options						
Select the	Select the mailer information for your job The IMB is required.					
– Mailer Information – Mailing Da	Mailer Information Mailing Date: 13/04/2016					
Permit Holder FI	agship Software Ltd 🗨					
Mailer ID Use for IMB	123456789-111254					
Mailing Agent FI	agship Software Ltd 🗨					
Mailer ID © Use for IMB	123456789-111254					
Mail Owner	agship Software Ltd					
Mailer ID O Use for IMB	123456789-111254					
Template	▼ _Delete					
Help Me	Next > Cancel					

On this first screen, select your mailing date and the customer information that is to appear at the top of the postage statement. You must choose one of permit holder, mailing agent or mail owner to use their mailer ID for the intelligent mail barcode (IMB). To enter a mailer ID and CRID for a customer, see the section on entering customer information.

#### Note:

The Intelligent Mail Barcode option only works if you have a mailer ID and CRID that you can acquire from USPS through the business customer gateway.

The following step allows you to choose options related to Mail Class, Piece Type, Container Type, and Pallets.

US Presort Options	US Presort Options
Select the mail class, piece type and container information for this job	Advanced Preparation Options for Pallets
Class and Piece Type Mail Class C First Class Mail C Standard Mail C Bound Printed Matter	Advanced Pallet Options Pallet Minimum for 0 minimum pallets No Merging or Reallocation
Piece Type       O Letter     O Card       Image: Transmission of the state of	<ul> <li>Create Merged Pallets</li> <li>City State</li> <li>5% Threshold</li> <li>Generate Reallocation Pallets</li> <li>SCF Pallet Reallocation with 3DG pallets</li> </ul>
C MM Letter Tray C Flat Tubs C EMM Letter Tray © Sacks Pallets C Sacks on Pallets Advanced Pallet Options	<ul> <li>SCF Pallet Reallocation without 3DG pallets</li> <li>ASF/NDC Pallet Reallocation</li> </ul>
Help Me     < Back	Help Me     < Back     Next >     Cancel

Clicking on the "Advanced Pallet Options" will take you to the second screen where you can select special pallet preparations such as merging, reallocation and setting a minimum for no-minimum pallets.

### • No minimum pallets:

A no minimum pallet is a pallet defined in the DMM as having no minimum number of pieces. By default, these pallets are filled to 500lbs so as not to create large numbers of minimally filled pallets but since there is no official minimum by setting a different value you can create more higher value pallets with less pieces.

### Create Merged Pallets:

A merged pallet can be created based on two different sets of rules. A merged pallet might be created when there is a number of pieces that could form undersized high value pallets by making a single high value pallet of proper size. The larger the mailing the more likely that a merged pallet can be created.

### Generate Reallocation Pallets:

A reallocation pallet can steal pieces from higher level pallets to create a lower level pallet by combining these stolen pallets with pieces in residue. The next screen deals will Mail Processing options. These options will change in availability based on your previous choices.

US Presort Options	US Presort Options
Select how the mail should be handled and whether the mailing is machinable	Select how the mail should be handled and whether the mailing is machinable
Mail Processing	Mail Processing Advanced
	Mail Handling
My mail qualifies for barcode discounts     Advanced	Carrier Route I In-County
C My mail does NUT quality for barcode discounts	Co-Traying (Both)
Non Machinable     Machinable     Piece bends to USPS standards	C Automation (Barcoded) C Non-Automation (Non-Barcoded)
Include unqualitied pieces at single piece price	Machinability
Carrier Route	C Non Machinable C Machinable
Merged	Piece meets deflection standards
۰ ۲	Include unqualified pieces at single piece price
Help Me < <u>B</u> ack <u>Next</u> > Cancel	Help Me     < Back

The first screen will give you the optimal settings for doing your mailing that should produce the best value; the options used will be listed below. If you want to adjust one of the parameters you can select the "Advanced" button and select all the parameters manually.

The next screen allows you to enter your piece parameters like length, width, weight, thickness, and lets you choose your office of deposit.

US Presort Options	
Enter the appropriate piece deposit (Dr	information and office of op Point)
Piece Information	
Length (in) 9	Height (in) 5
Thickness (in) 0.25	Weight (oz) 3
Thickness of 10 Pieces (in) 2.5	Weight of 10 Pieces (oz) 30
Office of Deposit	
Zip Code City 14240 BUFFALO	State
Help Me < Back	Next > Cancel

It is recommended that you take 10 pieces and make those measurements for weight and thickness as these affect the fill rates on trays, sacks and pallets.

Depending on your mailing type, you may change the options on the next screen. In case you are doing a nonprofit mailing, you can select that option, and enter your nonprofit number here.

US Presort Options					
Select your payment me information and	Select your payment method, drop point deposit information and non-profit status				
Pricing Postage Type	C				
Permit Imprint     Precanceled Stamps     Postage: 0	PC Postage     Federal Agency     Chargeback Code:				
C Metered Meter Serial Number:	C Smart Meter				
Payment Method C CAPS Account Num:	C Debit				
C Comercial Plus Pricing	Billing				
Plant Verified Drop Shipme     Profit or Non Profit     C Non Pro	nt C Other				
Help Me < <u>B</u> ack	<u>N</u> ext> Cancel				

If you are doing a Periodical Mailing, please enter the appropriate information here. If you do not have publication information set up, then you will need to do that in the customer information screen of iAddress<sup>TM</sup>.

US Presort Options					
Enter Information about the Periodical Mailing					
Periodical Information Publication Title	Periodical Information Publication Title				
Edition Code	Issue Date 13/04/2016				
Classroom Kews Science of Agriculture Eligible for Limited Circulation	% Advertising				
Make Firm Bundles  None Ride-Along	Firm Bundle Min.				
Weight (oz) 0 Thickness (in) 0	Length (in) 0 Height (in) 0				
Help Me < Back	Next > Cancel				

The last screen this is where you set the fills for bundles, containers, and pallets. Depending on previous choices the screen will vary slightly.

US Presort Options				
Enter the Sack/Tray and Pallet fill information				
Fill Levels         Bundle Information         Max. Pieces       24         *Does not apply to special bundles.         Container Information         Max Bag Weight       70         Ibs				
Pallet Information Pallet Max 2100 Weight (lbs)				
Help Me     < Back     Next >     Cancel				

If you are creating an electronic file, mail.dat or Shipping Services file, then you will be able to set the options on the following screens.

US Presort Options	US Presort Options	US Presort Options		
Produce a Shipping Services File and/or a mail.datfile	Move-update and service type code selection	These are USPS assigned ID's that are needed for processing Mail.Dat		
Generate Electronic Files? ○ Yes ○ No	Electronic File Options Full Service Basic Service None None Not Needed Full Service Multiple NCDA NCDA C 100% New List C OneCode ACS C ACS C A. S. E. Service Type Enter Service Type Code 261 Select Code From List Service Code: 261 Correction: None (Performed by software) Service Option: Full-Service Standard Mail IMB Tracing: None	Mail. Dat Information         Required         Save Path         [C:\iAddress\maildat.zip         Customer Registration ID         Job/Transaction ID         [111254         0ptional         Barcode Printer Identifier         CSA Agreement ID         Transportation Carrier ID         Truck or Dispatch Number		
Help Me <u>Back</u> <u>N</u> ext> Cancel	Help Me <u>Back</u> <u>N</u> ext Cancel	Help Me < Back Next > Cancel		

The mail.dat screens will allow you to select full service or basic service and set your service type code. There is no restriction on which service type code you can enter so please be sure you are entering the correct code for the service you are requesting.

Once you have completed all the sort setup you will be presented with the summary page. Confirm your selections and your sort will start. You can also save the template on this screen.

US Presort Options			
Summary of sort parameters			
Sort Parameters Summary			
Mailing Date: 2016-04-13			
Permit Holder: Flagship Software Ltd			
Mailing Agent: Flagship Software Ltd			
MailerID: 123456789 Prepared For: Flagship Software Ltd			
MailerID: 123456789			
Mail Class: Standard Mail Piece Type: FLAT			
Mail Wandling:			
Carrier Route			
Save Template			
Help Me < <u>B</u> ack Fi <u>n</u> ish Cancel			

After the sort is complete, the following screen will appear:

<b>E3</b> , US	Report Printing
1	CASS Report (3553)
0	Validation Report
1	Postage Statement / Fax Edit
1	Qualification Report
	Include Production Report
1	Parameter Report
0	Outside County Bundle/Container Report
🗆 Col	late Reports
	Generate Reports Close

If you would like a combined report document, enter the number of each report type in the appropriate text boxes. By default, "Collate Reports" is unchecked, which means that multiple generated copies of the same report will be grouped together. Selecting "Collate Reports" will instead order them in series. Click "Generate Reports" to generate the pdf.

By clicking "Generate Reports", iAddress<sup>™</sup> will generate the number of reports that are entered beside each report type. Once the reports are finished generating, iAddress<sup>™</sup> will open the generated pdf for you.

## US NCOA Processing (NCOALink®)

US NCOA Processing (NCOALink  $\ensuremath{\mathbb{R}}$  ) is available through the iAddress  $^{\mbox{\tiny M}}$  US software. NCOALink  $\ensuremath{\mathbb{R}}$  is offered as an unlimited service for an annual fee.

## **Before Processing NCOALink®**

In order to use NCOALink® , you will require the following:

- 1. 1) A signed Processing Acknowledgement Form (PAF) for each list owner requesting NCOALink® service. These agreements renew annually. If you are the list owner, you will require your own PAF
- 2. 2) A Letter of Intent (LoI) is required for each non-US list owner. USPS must approve the LoI for each non-US list owner before processing is permitted.
- 3. 3) A PAF ID will be issued for each List Owner. For non-US mailers, this PAF ID will be issued once USPS has approved Processing. Flagship Software will notify you once a PAF ID has been issued. Each PAF ID must be added to your Company Information/Customer Information tab. If you are the list owner, you will need to enter yourself as a customer

## Entering a PAF ID

From the File menu, select "Company Information". Add List Owner information, including contact information, permit and assigned PAF ID. Click OK to save your information.

IA	iAddress						– 🗆 X
File	Address Management NCOAl	ink Geocod	ling Pres	ort Print	Tools	Help	
	Create Job Create AddressMinerPRO Job Create ODBC Job Open Job Open Recent Jobs Save Job Merge into Job Job Wizard View Database Export Database	Ctrl+J Ctrl+O Ctrl+S Ctrl+M > Ctrl+D Ctrl+E	d Count: : ortables: I b Name:	2533 6 test US			Copyright Flagship Software Ltd 2000-2016 Version 4.0.0 [Data 1] CA: 07/14/2017 To 08/17/2017 (M) [Data 2] CA: 08/18/2017 To 09/14/2017 (M) US Correction/DPV: 07/15/2017 To 10/28/2017 (M) US Lookup: 06/15/2017 To 09/30/2017 (P) US Label Lists: 07/01/2017 To 08/31/2017
	Company Information Preferences Copy Canadian Data Copy US Data Exit	>					

### Starting NCOALink®

To start NCOALink®, you must create a job in iAddress<sup>™</sup> and run Correction/Validation. After correction is complete, the "Process NCOAlink®" option will be enabled on the NCOAlink® menu. Clicking "Process NCOAlink®" will start the wizard covered in the "Running an NCOALink® Job" section next in the manual.

#### Running an NCOALink® Job

To process your job through NCOALink®, you must provide the name fields for your job. An address can only be matched if the name at the address can also be matched.

US NCOA	US NCOA				
FirstName LastName ORIGADD	FirstName	LastName	ORIGADD 🔺	FirstName	
John Smith 2392 24TH	▶ John Smith 2392 24TH 5			LastName	
John Smith 99 GREEN F	John	Smith	99 GREEN F	ORIGADD	
John Smith 695 NE WAE	John	Smith	695 NE WAE	ADD	
John Smith 290 58TH S	John	Smith	290 58TH S	ORIGADD2	
John Smith 23 CALLE JL	John	Smith	23 CALLE JL	ADD2	
John Smith CALLE ATE	John	Smith	CALLE ATEN	ORIGCITY	
Lohn Smith SEEE 2850N	Lighn	Smith	566E 2850N	Πατγ	
Select the fields which contain the name information	Select the fields which contain the name information			ORIGPROV PROV ORIGPC PC COUNTRY	
First Name:       FirstName         Middle Name:       Image: Image				BAGBUN DMC SORTEDID ListOrder IsDupes IsDupe IsCommon Correct Valid	
Next > Cancel		<u>N</u> ext >	Cancel	p	

### **Field Selections**

The screen will display all fields in your job. This allows you to locate and select your name fields for processing NCOALink  $\ensuremath{\mathbb{R}}$ 

iAddress<sup>™</sup> offers you two ways to select your name fields:

- **"Combined Name Fields"** option allows you to select and de-select name fields from the "List of Fields" by double-clicking on them. This will add them into the names box. Using this method, the program will determine the name fields automatically. However, a name like [Martin Todd] or [Todd Martin] will be considered equivalent.
- "Separate Name Fields" allow you to specifically select fields.

### TIP:

If the company name is listed in a separate field it can be selected to increase the chance of a successful business move match.

### **Options Screen**

US NCOA				
Select the options you would like to run with NCOA processing.				
Job Name USAccess2000				
Office of Deposit Zip: City: State: Auto Apply Matches Auto Apply Matches				
Customer: 🔽 🔽				
Save Transaction Report Use Secure Transfer (slower)				
< <u>B</u> ack <u>Process</u> Cancel				

- Office of Deposit: The office of deposit information is required to do the NCOA process. Typing in the Zip Code<sup>™</sup> should automatically populate the City and State fields for you.
- **The US NCOA Matching Criteria:** You may choose the match criteria to be any combination of Individual, Family, and Business matches.
- **Auto Apply Matches:** Selecting this option will automatically apply the matched data to the file.
- Auto Purge Nixies: Selecting Auto Purge Nixies will have Nixie matches automatically removed.
- **The Customer Name and PAF ID:** These options must be selected from the list. This list references the Customer Information entered in the Customer Information screen.
- Save Transaction Report: This option will save the transaction report as soon as the process is done. This works in both modes and saves you the step of selecting "Report" from the main menu.

### The Export Window

If you are using the Job Wizard, this Export screen will appear:

Job Wizard - Step 5 of 7				
Select the export opti- table. This table con information following yo correction to the new	ons for the NCOA audit tains address tracking our address from entry to address after NCOA.			
✓ Export NCOA Audit Table         Fields To Export         ✓ NCOA Values         ✓ Original Values         ✓ Corrected Values         ✓ Just Matches				
Export Header Row Surround Fields With Quotes Specify Delimiter				
Export Type: Access 2000				
	<u>N</u> ext > Cancel			

If you are using the Interface Feature, this Export screen will appear:

NCOA Export			
-Fields To Export ▼ NCOA Values	Types to Export     All Types		
✓ Original Values	C Just Nixies C Just Matches		
Corrected Values	⊂ Just Estates		
<ul> <li>Export Header Row</li> <li>Surround Fields With</li> <li>Specify Delimiter</li> </ul>	<u>n Quotes</u>		
Export Type:	pecify Delimiter 📃 💌		
Export NCOA Audit Table	Cancel		

- NCOA Values are the address updates due to moves.
- Original values are the addresses in your database prior to correction.
- Corrected Values are addresses changed by the correction/validation process.
- Types to Export: There are three types of records, those that matched and have a change of address (Matches), those that matched but do not have a change of address (Nixies), and those that matched an estate record (Estates). If you select all types it will select the nixies records, the matches, and the estates.
- Export Type drop down: This drop-down list will allow you to select the type of database to export these records into.

The NCOALink® records are made up of the original values from your database, the changes made when the database was corrected and the changes that are suggested by NCOALink®.

IA iAddress					– 🗆 X
File Address Management	NCOAlink Geocod	ng Presort	Print Tools	; Help	
	Process NCOA	nk 🔓	3		Copyright Flagship Software Ltd 2000-2016
<b>FLAGS</b> SOFTWARE	Export NCOAlin View NCOAlin	k	US		Version 4.0.0 [Data 1] CA: 07/14/2017 To 08/17/2017 (M) [Data 2] CA: 08/18/2017 To 09/14/2017
•	Reports Undo NCOAlin	>			(M) US Correction/DPV: 07/15/2017 To 10/28/2017 (M) US Lookup: 06/15/2017 To 09/30/2017 (PULIS Label Lists: 07/01/2017 To 08/31/2017
[2017-07-24 13:57:28] US Sorted [2017-07-24 13:57:29] US Verified [2017-07-24 13:57:29] US Reporté	Account Status Activity Report NCOA Order Fr	rm			(P) US Label Lists: 07/01/2017 16 08/31/2017

There are two types of NCOALink® Reports available in iAddress™.

### **Activity Report**

You can print a report summarizing your job by selecting Reports from the NCOALink® menu. You can view a summary of your activity for the past 1, 3 or 12 months by selecting Activity Report from the NCOALink® menu.

IA iAddress	-	<u> </u>
File Address Management	Move Update Geocoding Presort Print Tools Help	
	Process Move Update     Copyright Flagship Software       Process DNM Only     (W) [Data 1] CA: 06/16/2017 T       Process Deceased Only     (S) [Data 2] CA: 07/14/2017 T	+ Ltd 2000-2016 Version 4.0.0 To 07/13/2017 To 08/17/2017
•	Export Move Update     (M) US Correction/DPV: 06/15/2017 T       View Move Update Results     (M) US Lookup: 05/15/2017 T       Reports     (P) US Label Lists: 06/01/2017 T       Updo Move Update     (P) US Label Lists: 06/01/2017 T	To 09/28/2017 To 08/31/2017 To 07/31/2017
	Account Status	^
	Activity Report > Canadian > Summary	
	NCOA Order Form U.S. > 1 Month Detail <sup>both</sup> 3 Month Detail 12 Month Detail	

### **Account Status**

Your account status screen will show Canadian NCOA and US NCOALink® information.



It will look something like this:

Accounting Information				
Canadian NCOA		American NCOA		
Customer: Flagship Software		Customer: Flagship Software		
Records Remaining:		Subscription: VALID		
Expires	Records			
2017-11-17	0			
2017-11-18	0			
2018-03-15	0			
2019-05-03	0			
2099-02-01	2,143,372,529			
	2,143,372,529			
To purchase more trar 416-410-6357 or 1-866	nsaction contact Flagship So 6-672-0007 extension 5	ftware at: OK		

## **Automation**

## **Command Line Options**

iAddress<sup>M</sup> offers powerful automation functionality that allows for you to easily and flexibly automate your address management processes. Using job configuration files, you can specify all the details of how your job is run – from the input files to the

correction parameters to the output files. By command line options, you can override the config file options found in the next section specific to job and merge file numbers.

There is a limit of 8192 characters on the command line.

### Format:

iAddress.exe filepath\filename.cfg [-logfile=\_filename][-existingoutput={datestamp (default), error, overwrite}][-KEEP\_IADDRESS\_OPEN={Y(default),N}] [-J#][\_FIELDNAME=\_FIELDDATA][-F#][\_FIELDNAME=\_FIELDDATA] [-CADATE] [-USDATE]

Example: iAddress.exe "c:\work\config\job1.cfg"

## It is important to note:

-J# (Job Number) must be specified for all \_FIELDNAME=\_FIELDDATA that is relevant to a job.

-J# (Job Number) and -F# (Merge file Number) must be specified for \_FIELDNAME=\_FIELDDATA that is relevant to both a merge file and a job until -J# or -F# is re-specified the same value for J# and F# are assumed for all \_FIELDNAME=\_FIELDDATA that follow.

If J# is re-specified then F# is cleared.

Job numbers start at value 1 and increase.

Merged file numbers start at value 0 and increase.

The jobs and files are ordered the same way they were first selected in iAddress™.

## **Command Line Parameters**

### -logfile

Usage:

-logfile="full/path/to/file.log"

Example:

```
iAddress.exe "c:\work\config\job1.cfg" -logfile="c:\work\logs\job1.log"
```

Description:

By default, the log is written to the same folder that iAddress<sup>™</sup> resides in (On a typical installation this is C:\Program Files\iAddress on a 32-bit OS; C:\Program Files (x86)\iAddress on a 64-bit OS). The log is named automate.log and is overwritten on subsequent runs. By using this parameter you can redirect the log output and gain some control over log storage.

### -quiet

Usage:

-quiet

Example:

iAddress.exe "c:\work\config\job1.cfg" -quiet

Description:

This parameter causes iAddress<sup>™</sup> to suppress Message Dialogs. While running in Quiet Mode, all dialogs that notify of a critical error in the application flow will cause iAddress<sup>™</sup> to fatally exit with an error code of 1 (which can be checked in a batch file). All message dialogs are logged to the logfile (regardless of this parameter).

### -existingoutput

Usage:

-existingoutput={datestamp, overwrite, error}

Example:

iAddress.exe "c:\work\config\job1.cfg" -existingoutput=overwrite

Description:

This parameter controls how iAddress<sup>™</sup> handles the scenario when defined output files (Such as the save job, labels or reports) already exist on the file system. The default is to datestamp the existing file.

**Datestamp:** Prepends the existing file with the creation date of the file, or the current date and time if it is unable to determine the creation date.

**Overwrite:** Overwrites the existing file. This will cause all the existing files to be deleted prior to iAddress<sup>™</sup> running the job.

**Error:** Causes iAddress<sup>™</sup> to trigger a fatal error before the job is run.

### -KEEP\_IADDRESS\_OPEN

Usage:

```
-KEEP_IADDRESS_OPEN={Y(default),N}
```

Example:

```
iAddress.exe "c:\work\config\job1.cfg" -KEEP_IADDRESS_OPEN=N
```

Description:

This parameter controls whether iAddress<sup>™</sup> remains open after the job is done.

### -J#

Usage:

-J# [\_FIELD\_NAME]=[\_FIELD\_DATA]

Example:

- iAddress.exe "c:\work\config\job1.cfg" –J1
- iAddress.exe "c:\work\config\job1.cfg" -J1 STANDARD\_MAILING\_DATE=2011-01-01 -F0 INPUT\_FILE=C:\foo\file.xls

Description:

This parameter represents a job number and must be specified for all \_FIELDNAME=\_FIELDDATA that is relevant to a Job. See "Important to note:" section above for more information on the usage of -J#. See also the config file options section for fieldnames and data.

-F#

Usage:

-F# [\_FIELD\_NAME]=[\_FIELD\_DATA]

### Example:

- iAddress.exe "c:\work\config\job1.cfg" –F0
- iAddress.exe "c:\work\config\job1.cfg" -J1 STANDARD\_MAILING\_DATE=2011-01-01 -F0
  - INPUT\_FILE=C:\foo\file.xls

### Description:

This parameter represents a Merged file number and must be specified for all \_FIELDNAME=\_FIELDDATA that is relevant to a merged file. See "Important to note:" section above for more information on the usage of -F#. See also the config file options section for fieldnames and data.

### -USDATE

Usage:

-USDATE

### Example:

iAddress.exe "c:\work\config\job1.cfg" –USDATE

### Description:

This option creates a file in the execution path called "USDATE.tab". This file contains the start and end dates of the US mailing data currently loaded on your system. USDATE.tab is a tab delimited file. This information can be used to determine if you have the data for the mailing date that you have chosen.

### -CADATE

Usage:

### -CADATE

Example:

iAddress.exe "c:\work\config\job1.cfg" –CADATE

### Description:

This option creates a file in the execution path called "CADATE.tab". This file contains the start and end dates of the Canadian mailing data currently loaded on your system. CADATE.tab is a tab delimited file. This

information can be used to determine if you have the data for the mailing date that you have chosen.

# **Config File Options**

Comments

All Comment in the cfg file are started with #. Any line that begins with this tag are not read or processed.

Start of Job

This section will always appear at the top of each job. Multiple jobs can be listed in a cfg file and the START parameter will increment for each job.

START=The start number of this job 1+

JOB\_NAME=name of the job

STANDARD\_MAILING\_DATE=YYYY-MM-DD

NUMFILES= The list of the number of files that will be merged in 0+

SEED\_RECORD=Can be placed multiple times indicating index of seed group to use.

File Input

This section can be repeated for a number of times equal to the number of files you want to merge in. The FILE parameter will be incremented for each file.

FILE=The start number of this file 0+

INPUT\_FILE=Full path of the input file.

DONT\_EXPAND\_FIELDS=Y/N - On input do you want the field size maintained? (fixed length/dbf)

CURRENTABLENAME=The name of the table you want input? (files with tables)

TAB\_DELIMITED=Y (text files)

FIXED\_LENGTH\_TEMPLATE=file path of the template to use for fixed length import. (text files)

SPECIFY\_DELIMITED=The symbol used to delimit the file (text files)

IS\_HEADER\_ROW=Is the first row a header row (text and excel files)

ALL\_FIELDS\_AS\_TEXT=Y/N -Load all columns in your text file as a text data type.

ADD\_COLUMN=Map the first address field

ADD2\_COLUMN=Map the second address field

CITY\_COLUMN=Map the city field (separate fields only)

PROV\_COLUMN=Map the province or state field (separate fields only)

PC\_COLUMN=Map postal code or zip code field (separate or combined city/prov only)

CITY\_PROV\_COLUMN=Map the combined city/prov or city/state field (combined city/prov only)

CITY\_PROV\_PC\_COLUMN=Map the combined city/prov/pc or city/state/zip field. (all combined)

All the name fields are optional and are used for the purposes of duplicate detection.

FNAME\_COLUMN=First Name

LNAME\_COLUMN=Last Name

NAME1\_COLUMN=Alternate matching field

NAME2\_COLUMN=Alternate matching field

NAME3\_COLUMN=Alternate matching field

LANG\_COLUMN=For correction, determines the language of a record if language by field is chosen.

**Correction Options** 

CORRECT=Y/N - Do you want a correction performed, if N then skip all other correction instructions

VALIDATION\_ONLY

USE\_PREFERRED\_CITY\_NAME

UPPER\_LOWER\_CASE=Y/N – N will upper case the address, Y will create mixed case addresses.

TWO\_LINE\_OUTPUT=Y/N – will prefer two lines, N will have no preference

FORCE\_ONE\_LINE=Y/N – will force the two address lines together

USE\_ACCENTS=Y/N – will use accents on words when french is the selected language.

WESTERN\_STYLE=Y/N – unit number precedes the street number and is connected by a dash.

MACHINEABLE=Y/N – Forces CPC criteria for machinable mail.

SHORTEN\_ADDRESS=Y/N – Use the shortened form of the address, i.e. Street -> st

UPDATE\_LVR=Y/N – Standardizes large volume receiver names in your job.

UPDATE\_VALIDS=Y/N - Update valid addresses with the formatting options.

 $SPACE_PC=Y/N - Place$  a space in the middle of the postal code.

MIN\_SERP\_RURAL=Y/N – Use the SERP minimum standards for correcting rural addresses.

CITY\_LENGTH= (13, 18, 40, 0) – Defines the number of characters to limit. 0 means no limit.

LANGUAGE=A text definition of how you want the address correction to handle language:

AUTOMATIC – Detect the language of the address and use the same language.

ALL\_ENGLISH – Switch all addresses to CPC english conversion.

ALL\_FRENCH – Switch all addresses to CPC french conversion.

BY\_PROVINCE – Switch all addresses in Quebec to CPC french conversion otherwise english.

BY\_INDICATOR – Use the language conversion specified by the language field mapped.

LANGUAGE\_FIELD=The name of the field that will be used to determine language by indicator.

(overrides LANGUAGE if populated)

ENGLISH\_SYMBOL=The character in the language field that indicates english.

(requires LANGUAGE\_FIELD be populated)

FRENCH\_SYMBOL=The character in the language field that indicates french.

(requires LANGUAGE\_FIELD be populated)

Geocoding Options

 $GEO_DO_GEOCODE=Y/N - Do geocoding on this job or not.$ 

GEO\_NUMERIC\_DEGREES=Y/N – Display numeric degrees (Requires Alpha be the opposite)

GEO\_ALPHA\_DEGREES= Y/N – Display alphabetic degrees (Requires Numeric be the opposite)

GEO\_COMPARE\_PCS=Comma separated list of postal codes to compare during coding.

GEO\_EXCLUDE\_UNCODED=Filter records that could not be geocoded.

Closer and Farther have priority over distance filtering. If they are both included then only filtering by closer than and farther than will be applied.

GEO\_CLOSER\_THAN=Filter postal codes closer than this value in kilometres (exclude if not used)

GEO\_FARTHER\_THAN=Filter postal codes farther than this value in kilometres (exclude if not used)

GEO\_NUM\_PIECES=Number of pieces to keep after distance filtering

GEO\_FARTHEST = Y/N distance filtering on farthest or closest

NCOA Options

 $NCOA_DO_NCOA=Y/N - Run$  the NCOA process or not.

NCOA\_DNM\_ONLY=Y/N - Run the do not mail process without running NCOA

(Requires NCOA\_DO\_NCOA=N)

NCOA\_CDL\_ONLY=Y/N - Run the deceased list process without running NCOA

(Requires NCOA\_DO\_NCOA=N)

NCOA\_DO\_NCOA\_TEST=Y/N – Run the NCOA process in test mode (override NCOA\_DO\_NCOA)

NCOA\_APPLY\_MATCHES=Y/N – Apply the matches to your list after processing is complete.

NCOA\_PURGE\_NIXIES=Y/N – Purge the nixies from your list after processing is complete.

NCOA\_RUN\_DNM=Y/N – Run the do not mail process.

NCOA\_PURGE\_DNM=Y/N – Purge the do not mail records from your list after processing is complete.

NCOA\_DNM\_MATCH=Number indicating matching options for do not mail.

0 – Match the First and Last name as well as the address. (suggested)
1 – Match using the Last name and address only.

2 – Match using only the address.

NCOA\_RUN\_CDL=Y/N – Run the deceased list process.

NCOA\_PURGE\_CDL=Y/N – Purge the deceased list records from your list after processing is complete.

NCOA\_FIELDS\_COMBINED=Y/N – The names are combined in a single field.

NCOA\_COMBINED\_TEXT=A list of field names to combine, enclosed by square brackets. [a] [b] [c]

(Requires NCOA\_FIELDS\_COMBINED=Y)

NCOA\_FIRST\_NAME=The name of the field containing the first name, can be blank.

(Requires NCOA\_FIELDS\_COMBINED=N)

NCOA\_MIDDLE\_NAME=The name of the field containing the middle name, can be blank.

(Requires NCOA\_FIELDS\_COMBINED=N)

NCOA\_LAST\_NAME=The name of the field containing the last name, cannot be blank.

(Requires NCOA\_FIELDS\_COMBINED=N)

NCOA\_NAME\_SUFFIX=The name of the field containing the name suffix, can be blank.

(Requires NCOA\_FIELDS\_COMBINED=N)

NCOA\_COMPANY\_NAME=The name of the field containing the company name, can be blank.

(Requires NCOA\_FIELDS\_COMBINED=N)

NCOA\_PRINT\_TRANSACTION\_REPORT=Define the printing/saving of the transaction report.

0 – Do Nothing

1 – Print only

2 – Save only

3 – Print and Save

NCOA\_PRINT\_PRINTER\_NAME=Exact name of the printer to print from.

NCOA\_PRINT\_BIN\_NUMBER=The bin number on the printer to print from.

NCOA\_PRINT\_TRANSACTION\_FILENAME=Complete path in which to save the transaction report.

NCOA\_EXPORT\_WHICH\_EXPORT=Define the type of export for the NCOA audit table.

0 – Export All

1 – Export just the nixies.

2 – Export just the matches.

NCOA\_EXPORT\_NCOA\_VALUES=Y/N - Export the forwarding address (does not apply to nixies)

NCOA\_EXPORT\_ORIG\_VALUES=Y/N - Export the original values when the file was imported.

NCOA\_EXPORT\_CORR\_VALUES=Y/N - Export the values as they appeared after correction.

NCOA\_EXPORT\_DNM\_VALUES=Y/N – Export the CMA values (requires CMA be run)

NCOA\_EXPORT\_FILENAME=Complete path in which to save the export file.

NCOA\_EXPORT\_TYPE=Text defining the type of output.

"Access 2000", "Access 97", "DBase III", "DBase IV", "DBase V", "Excel 4.0", "Excel 5.0",

"Excel 97", "Tab Delimited", "Comma Delimited", "Specify Delimiter", "Fixed Length"

NCOA\_EXPORT\_HEADER\_ROW=Y/N – Use a header row on export (text export only)

NCOA\_EXPORT\_QUOTES=Y/N – Surround the fields with double quotes (text export only)

NCOA\_EXPORT\_DELIMITER=Delimiter used, (i.e. ,) (text export only)

NCOA\_ENDUSER=The name of the end user customer as it appears in your customer list.

NCOA\_ENDUSER\_TOUS=This overrides the TOUS ID entered in the customer record (manual entry, required with NCOA\_SERVICEPROVIDER\_TOUS)

NCOA\_SERVICEPROVIDER\_TOUS=This overrides the TOUS ID in the company record (manual entry, required with NCOA\_ENDUSER\_TOUS)

Sortation Options

SORT=Y/N – Perform the sort with no conditions (supercedes SORT\_ONLY\_IF\_95)

SORT\_ONLY\_IF\_95=Y/N – Perform the sort if correct and valid pieces are 95 percent of list.

MAIL\_TYPE=Defines the type of sort to perform. All following options vary based on this value.

Valid values:

PERSONALIZED\_SPECIAL\_HANDLING

PERSONALIZED\_MACHINEABLE

PUBLICATION\_SPECIAL\_HANDLING

PUBLICATION\_DFP

PUBMAIL\_MACHINEABLE

LETTERMAIL\_MACHINEABLE

MACHINEABLE\_LABELS\_ONLY=Y/N – Y for machinable mailings only, does not sort.

MACHINEABLE\_LABELS\_ONLY\_NUMBER\_OF\_CONTAINERS=

The number of container labels to print (Requires MACHINABLE\_LABELS\_ONLY)

### MACHINEABLE\_LABELS\_ONLY\_NUMBER\_OF\_PALLETS=

The number of pallet labels to print (Requires MACHINABLE\_LABELS\_ONLY)

MACHINEABLE\_LABELS\_ONLY\_FILL\_PAGE=Y/N

Fills the container labels page, 4 per page. (Requires MACHINABLE\_LABELS\_ONLY)

UNCODED\_AS\_MACHINEABLE=Y/N

Any pieces that cannot be included are sent as machinable (Requires INCENTIVE\_LCP)

ENVELOPE\_WEIGHT=The weight of the piece in grams.

ENVELOPE\_THICKNESS=The thickness of the piece in mm. (shortest side)

PIECE\_LENGTH=The length of the piece in mm. (longest side)

PIECE\_HEIGHT=The height/width of the piece in mm. (second longest side)

BAG\_WEIGHT\_MAX=The maximum weight of the container you are using. (Must be exact)

Flat Tub = 21 Letterflatainer = 21.705

BUNDLE\_MAX=The maximum number of pieces in a bundle (max in container for machinable sorts)

CONTAINER\_MAX=The maximum number of pieces in a container.

CONTAINER\_TYPE=The type of container being used. (must be appropriate for piece and sort)

FLATTUB LETTERFLATAINER

BRICK\_PILE\_PIECES\_PER\_PALLET\_MIN=The fewest pieces to place on the pallet.

BRICK\_PILE\_PIECES\_PER\_PALLET\_MAX=The most pieces to place on the pallet.

MAIL\_SIZE=Defines the type of piece you will be preparing. Must use one of the following:

- 1. STANDARD
- 2. OVERSIZED
- 3. DIMENSIONAL

MONOPAL\_TYPE=The type of pallet being used, empty if none.

MONOTAINER

PALLET

OFFICE\_OF\_DEPOSIT=The name of the office of deposit

OFFICE\_OF\_DEPOSIT\_PC=The postal code of the office of deposit.

OFFICE\_OF\_DEPOSIT\_SITE\_NUMBER=The site number for this office of deposit if it exists.

PHANTOM=Y/N - Will you be creating a phantom mailing (less than 1000 pieces, boosted to 1000)

TIME\_COMMITTED=1/0 – use the time committed (1).

OEL\_ON\_FRONT\_AND\_END=Number indicating the positioning of the OEL in a bundle.

4001 - First piece of the bundle

4002 - Last piece of the bundle

4003 – First and last piece of the bundle

4004 – All pieces in the bundle

OEL\_STARS\_POSITION=A word describing where the stars in an OEL should be placed

FIRST LAST FIRST\_AND\_LAST

OEL\_NUM\_OF\_STARS=The number of stars to place on the OEL.

BUNDLE\_BREAK\_CHAR=The character to use to define when a bundle changes.

CONTAINER\_BREAK\_CHAR=The character to use to define when a container changes.

PALLET\_BREAK\_CHAR=The character to use to define when a pallet changes.

\*\*BREAK\_IN\_BAGBUN\_COLUMN=Y/N – Add the bundle break character to the BAGBUN field.

TAX\_RATE=The valid tax rate where the mail is being deposited.

CA\_CLIENT\_INFORMATION=The customer name exactly as it appears in your customer list.

CUSTOMER\_REFERENCE=The customers reference number.

DO\_BRICK\_PILING= Y/N – Do brick piling in this mailing.

BRICKLEVEL3=Y/N – Use brick piling level 3.

BRICKLEVEL4=Y/N – Use brick piling level 4.

BRICKRESIDUE=Y/N – Brick pile the residue pieces.

\*\*TENPCTMINPALLET=Y/N – Use the 10 percent minimum on brick piled pallets (restricted by drop point)

USE\_RETIRED\_PC=Y/N – Use postal codes for sorting that have been retired by CPC.

SORT\_UNCORRECTABLE=Y/N – Include uncorrectable addresses in sort.

SORT\_QUESTIONABLE=Y/N – Include questionable addresses in sort.

SORT\_UNCODED\_AS\_RESIDUE=Y/N – Places invalid postal codes in residue containers.

SPLIT\_LARGE\_BUNDLES=Y/N – Make 2 smaller bundles when a legal large bundle is constructed.

MAILING\_PLAN\_FILE=Full path in which to save the mailing plan file.

Gender Options

GENDERIZE=Y"

COLUMNTOGENDERIZE=The name of the field containing the names to genderize.

COLUMNUPDATEDWITHVALUE=The name of the field that will hold the prefix.

(will be generated if it doesn't exist.)

AllENGLISH=Y/N - Use all english prefixes.

ALLFRENCH=Y/N – Use all french prefixes.

 $\mathsf{BASEDONADDRESS}=Y/N$  – Determine the prefix language based on the language of the address.

ENGLISHMASCULIN=English prefix to use for male names.

FRENCHMASCULIN=French prefix to use for male names.

ENGLISHFEMININE=English prefix to use for female names.

FRENCHFEMININE=French prefix to use for female names.

ENGLISHANDROGYNOUS=English prefix to use for undetermined names.

FRENCHANDROGYNOUS=French prefix to use for undetermined names.

ENGLISHNOMATCH=English prefix to use for names not appearing in the list.

FRENCHNOMATCH=French prefix to use for names not appearing in the list.

**Field Formatting Options** 

UPPERLOWER=Y

ALLUPPERCASE=Y/N - Format selected fields to upper case.

ALLLOWERCASE=Y/N - Format selected fields to lower case.

CAPITALIZEFIRSTLETTER=Y/N - Format selected fields with only the first letter in upper case.

RULECAPITALIZATION=Y/N - Format selected fields to use double capitalization where appropriate

UPPERLOWER\_BUSINESS=Y/N - Use business rules(Y), use personal rules(N)

(Requires RULECAPITALIZATION)

\*\*APPLYADDRESSCASING=

CASEACRONYMS=Y/N – Use the casing rules from the acronyms database.

SHORTENACRONYMS=Y/N – Match with the long acronym and convert to short acronym.

LENGTHENACRONYMS=Y/N – Match with the short acronym and convert to long acronym.

SPACEPOSTALCODES=Y/N – If a selected field is the postal code field place a space in the middle.

ADDRESSCASINGRULES=Y/N – Apply casing rules to selected address fields as well.

UPPERLOWER\_FRENCHCAPS=Y/N – Use the french capitalization rules.

REMOVE\_ACCENTS=Y/N – Remove accents from french words.

NUMBEROFFIELDSSELECTED=The number of fields selected

UPPERLOWER\_FIELD\_NUMBER0=The name of the first field selected

UPPERLOWER\_FIELD\_NUMBER1=The name of the second field selected

UPPERLOWER\_FIELD\_NUMBER#=Same as above where # is the incrementing field selected.

Graphic Analysis Report Options

DEMOGRAPHIC=Y/N – Produce a demographic analysis report.

DEMOGRAPHIC\_FILE\_NAME=The full path of the file to save the report to.

DEMO\_FIELD\_NUMBER0=The full name of the report you wish to produce first.

DEMO\_FIELD\_NUMBER1=The full name of the report you wish to produce second.

DEMO\_FIELD\_NUMBER#=The full name of the report you wish to produce #-1.

Filter Mailing Options

DOFILTERIZATION=Y/N – Run the filter mailing.

FILTER\_SEEDS=Y/N – Include the seed records when filtering.

Intelligent Filter

PROVINCEFIELDS=A comma separated, single quote surrounded list of province codes to filter.

i.e. 'ON', 'BC', 'NS'

CITIES FIELDS=A comma separated, unquoted list of cities to filter.

i.e. Toronto, Vancouver, Halifax

FSA FIELDS=A comma separated, unquoted list of FSA's or partial FSA's to filter.

i.e. M1M, L4\*, P\*

HASSTAR=Y/N – Does the city or FSA filter include asterisks?

Address Type

ADDTYPE\_APARTMENT=Y/N – Filter address type apartment.

ADDTYPE\_GENERAL\_DELIVERY=Y/N – Filter address type general delivery.

ADDTYPE\_GOVERNMENT=Y/N – Filter address type government.

ADDTYPE\_LVR=Y/N – Filter address type large volume receiver.

ADDTYPE\_RESIDENCE=Y/N – Filter address type residence.

ADDTYPE\_RURAL\_ROUTE=Y/N – Filter address type rural route.

ADDTYPE\_PO\_BOX=Y/N – Filter address type P.O. Box.

Expert Filter

EXPERT\_FIELD=The name of the field used for the expert filter.

EXPERT\_OPERATOR=The actual operator being used for the comparison. i.e. <>

EXPERT\_TEXT=The value to which the field is being compared via the operator.

#### Random Filter

RANDOM\_TEXT=The number of records you wish to have remaining after the random filter.

Extra Character Filter

TAB=Y/N – Filter out tab characters.

LINEFEED=Y/N – Filter out line feed characters.

FORMFEED=Y/N – Filter out form feed characters.

CARRIAGERETURN=Y/N – Filter out carriage return characters.

WINDOWSNEWLINEFEED=Y/N – Filter out windows new line feed characters.

**Blank Lines Filter** 

BLANKLINEADDRESS1=Y/N - Filter where address line 1 field is blank. (cumulative)

BLANKLINEADDRESS2=Y/N – Filter where address line 2 field is blank. (cumulative)

BLANKLINECITY=Y/N – Filter where city field is blank. (cumulative)

BLANKLINEPROV=Y/N – Filter where the province/state field is blank. (cumulative)

BLANKLINEPOSTALCODE=Y/N – Filter where the postal code/zip field is blank. (cumulative)

Customer Options

CUSTOMERNAME=The name of the customer, usually company name. (Required)

CUSTOMERNUMBER=The customers CPC account number. (Optional)

CUSTOMER\_CONTRACT\_NUMBER=The customers contract number. (Optional)

CUSTOMER\_ADDRESS=The customers address. (Required)

CUSTOMER\_CITY=The customers city. (Required)

CUSTOMER\_PROV\_STATE=The customers province or state. (Required)

CUSTOMER\_PC\_ZIP=The customers postal code / zip code. (Required)

CUSTOMER\_COUNTRY=The customers country. (Required)

CUSTOMER\_USPS\_MAILERID=The customers mailers ID, hyphen CRID. (Optional)

i.e. 123456789-65495

CUSTOMER\_TOUSID=The customers CPC terms of use ID for NCOA. (Unused/Optional)

#### Export Options

There are three exports that have the same parameters. To denote which type of export you are doing, you use the following parameters with no value, followed by the list below.

NORMAL\_EXPORT=

DUPLICATE\_EXPORT=

COMMON\_RECORDS\_EXPORT=

The Export Parameters

EXPORT\_FILE\_NAME=The full path of the file to export.

EXPORT\_FILE\_TYPE=The type of file to export.

Access 97

Access 2000

DBase III

DBase IV

Excel 4.0

Excel 5.0

Excel 97

Comma Delimited

Tab Delimited

Fixed Length

Specify Delimiter

CORRECTED\_ADDRESS=Y/N – Include records with a 'C' in the Valid field.

VALID\_ADDRESS=Y/N – Include records with a 'V' in the Valid Field.

EXPORT\_UNCORRECTED=Y/N – Include the uncorrected records in the export.

EXPORT\_UNCODED\_ADDRESS=Y/N - Include ONLY the uncoded records in the export.

EXPORT\_FOREIGN=Y/N – Include ONLY the foreign records in the export.

EXPORT\_EXTRACONTROLFIELDS=Y/N – Include the extra control fields as set or by default:

[SORTEDID] [BAG] [LANG] [FCP] [Correct] [Correct\_Text]

[IsCommon] [BUN] [BUNTYPE] [Valid] [Dupes] [IsDupe]

[AddType] [DF] [CITYC] [DCF] [RDF] [ADD\_LOCALE]

[MERGEFILE] [iAddressID] [PALLET]

CA\_EXPORT\_CORRECTION\_FIELDS=Y/N – Include fields with correction responses: [VALID] [CORRECT] [CORRECT\_TEXT] [IADDSTATUS]

ADD\_ORIGINAL=Y/N – Include the mapped original fields created by iAddress: [ORIGFIRM\_NAME] [ORIGFNAM] [ORIGLNAM] [ORIGNAME1] [ORIGNAME2] [ORIGNAME3] [ORIGADD] [ORIGADD2] [ORIGCITY] [ORIGPROV] [ORIGPC] [ORIGUSER\_LANG] [ORIGCOUNTRY] [ORIGURBANIZATION]

EXPORT\_ADD\_ADDRESS\_COMPONENTS=Y/N – Include the address component fields: [STREETNUMBER] [STREETNAME] [STREETTYPE] [STREETDIR] [SUITE] [POBOXNUMBER] [POBOXTYPE] [RRNUMBER] [ADD\_EXTRA]

EXPORT\_ADD\_STATUS=Y/N – Include status fields:

[STATUS] [COMMENT]

INCLUDE\_ALL\_FIELDS=Y/N – Include all unmapped fields from the original database.

LEADING\_ZEROS=Y/N – ListOrder is a number field, do you want it to be zero-padded.

ONLY\_SORTED\_RECORDS=Y/N – Export only records that were included in the sort.

UNSORTED\_RECORDS\_AT\_END=Y/N – Include the unsorted records at the end of the export.

REVERSE\_SORT\_ORDER=Y/N – Order the export by the descending value of ListOrder.

ORIGINAL\_ORDER=Y/N – Export your list in the order on import.

EXPORT\_COLUMN\_HEADER=Y/N – Include the header row as the first row. (Text Files Only)

EXPORT\_TEMPLATE=The full path of the template to be used for fixed length export.

(requires fixed length export)

EXPORT\_SPECIFY\_DELIMITER=The delimiter to be used. i.e. ","

(require text file delimited export)

EXPORT\_SURROUND\_WITH\_QUOTES=Y/N – Surround text with quotes.

(requires a text file export)

EXPORT\_SPECIFIED\_FIELDS=A comma delimited list of the exact fields in the exact order. Using this parameter can cause errors during export if the field names do not match.

EXPORT\_EXTRACONTROLFIELDS\_LIST=A comma delimited list of fields that qualify as extra control fields. Used only if EXPORT\_EXTRACONTROLFIELDS is Y

Duplicate Options

DO\_DUPES=Y/N – Run a duplicate extraction process.

DUPES\_ADD1=Y/N – Check dupes against ADD field.

DUPES\_ADD2=Y/N – Check dupes against the ADD2 field.

DUPES\_FNAME=Y/N – Check dupes against the FNAM field.

DUPES\_LNAME=Y/N – Check dupes against the LNAM field.

DUPES\_CITY=Y/N – Check the dupes against the CITY field. (Not recommended)

DUPES\_PROV=Y/N – Check the dupes against the PROV field.

 $DUPES_PC=Y/N - Check$  the dupes against the PC field.

DUPES\_NAME1=Y/N – Check the dupes against NAME1 field.

DUPES\_NAME2=Y/N – Check the dupes against NAME2 field.

DUPES\_NAME3=Y/N – Check the dupes against NAME3 field.

DUPES\_PERCENT\_MATCH=The percentage match against name fields.

DUPES\_PARTIAL\_NAME=Y/N – Match text within field instead of whole field.

DUPES\_IGNORE\_RURAL=Y/N – Run the dupe on non-rural addresses only.

DUPES\_DELETE\_DUPES=Y/N – Delete the duplicates on completion.

DUPES\_SAVE\_DUPE\_REPORT=The full path of the file to save the report.

DUPES\_SAVE\_COMMON\_REPORT=The full path of the file to save the report.

DUPES\_EXPORT\_DUPLICATES=Y/N – Must have export values for duplicates export.

DUPES\_EXPORT\_COMMON=Y/N – Must have export values for common export.

DUPES\_EXPORT\_DUPES\_ONLY=Y/N – Include only the duplicate records in the export.

DUPES\_EXPORT\_DUPES\_PLUS\_ORIGINAL=Y/N – Include duplicates and originals in the export.

DUPES\_SUBTRACT=Y/N – Subtract common records.

DUPES\_KILL\_FILE=The FILE number of the kill file.

DUPES\_DO\_CORRECTION=Y/N – Run a quick correction before doing the dupes to normalize.

DUPES\_BLANK\_AS\_DUPE=Y/N – Match a blank and non-blank record.

Dupe Priority Orders

Please use the job wizard to create examples of how these parameters are used. The exact names need to be used and a spelling mistake here can cause an error during the setup for the duplicate removal process.

DUPE\_NO\_FILES=Y/N – Either setting will activate priority sequencing

DUPE\_PRIORITY\_ORDER=Semicolon delimited list of parameters denoting the order or priority.

DUPE\_NUM\_FILES=The number of files merged into your job.

DUPE\_FILE\_PRIORITY=Semicolon delimited list of FILE numbers, indicating priority sequence.

DUPE\_NO\_LENGTH\_FIELDS=Y/N – Use the field length as a priority.

DUPE\_LENGTH\_FIELDS=Semicolon delimited list of field names to use for priority sequence.

DUPE\_CORRECT\_VALID=C,V or U depending on what value you want to prioritize.

DUPE\_FRENCH\_ENGLISH=E, F or NONE for priority sequence on language.

DUPE\_SEQUENTIAL\_FIELD=The name of the field to use.

DUPE\_SEQUENTIAL\_ASCDESC=A for Ascending and D for Descending.

DUPE\_SEQUENTIAL\_COMPARE\_TYPE=0 for a binary compare, 1 for a text compare.

Labels Options

CONTAINER\_BAG\_PRINTER=The name of the printer as it appears in the printers list. (If printing)

CONTAINER\_BAG\_TRAY=The printer tray that will be used. (If printing)

CONTAINER\_BAG\_PDF=The full path to which to save the pdf file.

BUNDLE\_PRINTER=The name of the printer as it appears in the printers list. (If printing)

BUNDLE\_TRAY=The printer tray that will be used. (If printing)

BUNDLE\_PDF=The full path to which to save the pdf file.

MONOTAINER\_PALLET\_PRINTER=The name of the printer as it appears in the printers list. (If printing)

MONOTAINER\_PALLET\_TRAY=The printer tray that will be used. (If printing)

MONOTAINER\_PALLET\_PDF=The full path to which to save the pdf file.

PRINT\_JOB\_NAME=Y/N – Print the job name on the container labels.

PRINT\_BUNDLE\_LABELS\_STACKABLE=Y/N – Print the labels stackable.

PRINT\_CONTAINER\_LABELS\_STACKABLE=Y/N – Print the labels stackable.

CONTAINER\_BAG\_LEGAL=Y/N – Print the container labels on legal paper.

MONOTAINER\_PALLET\_PAPER\_SIZE=1 for letter size, 5 for legal size pallet label.

SAVE\_LABELS\_TO=The Folder in which the labels will be saved.

SAVE\_LABELS\_PREFIX=An indicator to put at the beginning of the label file names.

Report Options

Print reports

PRINT\_ALL\_REPORTS\_TO=The name of the printer as it appears in the printers list. (If printing)

PRINT\_REPORTS\_TO\_TRAY=The printer tray that will be used. (If printing)

NUM\_VALIDATION\_REPORT\_COPIES=Number of copies of the validation report.

NUM\_UNCORRECTABLE\_REPORT\_COPIES=Number of copies of the uncorrectable report.

NUM\_CORRECTED\_REPORT\_COPIES=Number of copies of the corrected report.

NUM\_STATEMENT\_OF\_MAILING\_COPIES=Number of copies of the statement of mailing.

NUM\_STATEMENT\_OF\_MAILING\_PDF\_COPIES=Number of copies of the PDF. (requires save)

NUM\_DELIVERY\_COPIES=Number of copies of the volume summary.

```
NUM_REPORT_CONTAINER_COPIES=Number of copies of the bag and bundle report.
```

Save Reports

SAVE\_VALIDATION\_REPORT\_TO\_FILE=Full path to save the validation report.

SAVE\_REPORT\_UNCORRECTABLE\_TO\_FILE=Full path to save the uncorrectable report.

SAVE\_REPORT\_CORRECTED\_TO\_FILE=Full path to save the corrected report.

SAVE\_STATEMENT\_OF\_MAILING\_TO\_FILE=Full path to save the statement of mailing.

SAVE\_STATEMENT\_OF\_MAILING\_TO\_PDF\_FILE=Full path to save the statement of mailing pdf.

SAVE\_DELIVERY\_TO\_FILE=Full path to save the volume summary.

SAVE\_REPORT\_CONTAINER\_TO\_FILE=Full path to save the bag and bundle report.

Saving iAddress Jobs Files

SAVE\_FILE\_CORRECTED=Full path to save the iAddress job file after correction.

SAVE\_FILE\_SORTED=Full path to save the iAddress job file after sort.

SAVE\_FILE\_COMPLETE=Full path to save the iAddress job file after all processes complete.

### Appendix

### **Move Update Codes**

### NCOA (Column NCOA)

NCOA (column "NCOA"):

- UM (Unmatchable Record): General Delivery, Invalid or no name
- NM (Non-Matched Record): Valid address that does not appear in the NCOA database (a.k.a. person hasn't moved)
- UB (Unapplied Business Match): A record that matched as a business move but has not yet been applied to the job.
- UI (Unapplied Individual Match): A record that matched as an individual move but has not yet been applied to the job.
- UF (Unapplied Family Match): A record that matched as a family move but has not yet been applied to the job.

- UN (Unapplied Nixie Match): A record that matched as a nixie record but has not yet been applied to the job.
- AB (Applied Business Match): A record that matched as a business move and has been applied to the job.
- AI (Applied Individual Match): A record that matched as an individual move and has been applied to the job.
- AF (Applied Family Match): A record that matched as a family move and has been applied to the job.
- AN (Applied Nixie Match): A record that matched as a nixie record and has been removed from the job.

3rd Characters (Canada):

- C: CPC initiated Canada Post put in the NCOA record
- U: Rural to Urban Conversion
- M: NCOA Moveback Person moved and then moved back to the previous address.
- X: Privacy No documentation, generally associated with nixies.

3rd/4th Characters (U.S.):

- "A": Perfect Match
- "01": Perfect match but a foreign record is returned
- "02": Match! Nixie
- "03": Match! Nixie P.O. Box
- "14": Match! (New address is undeliverable)
- "19": Match! Non automation record returned. (no zip 4 coding)
- "91": Match! Some secondary information was absent in the input address, therefore it is dropped from return.
- "92": Match! Some secondary information was absent in the master record, therefore it is dropped from return.
- "04": No Match (address good but needs individual information, only has family)
- "09": No Match (address good but needs individual information, Family match to Building not permitted)
- "10": No Match (address good but needs individual information, Family match to Rural Route not permitted)
- "18": No Match (address good but needs individual information, Family match to GD not permitted)
- "11": No Match BUT This would be a match if family matching is used.
- "15": No Match BUT This would be a match if family matching is used.
- "00": No Match -- perfect no match
- "": No Match -- record is uncoded
- "06": No Match (address good but individual information does not match)
- "16": No Match (address good but individual information does not match)
- "17": No Match (address good but individual information does not match)
- "13": No Match (address good but individual information does not match)
- "12": No Match (address is good but middle initial conflicts on individual matching)
- "66": No Match (used to be a match)
- "05": No Match (address good but delivery point is ambiguous)

- "07": No Match (address good but genders do not match)
- "08": No Match (address matched to multiple results that were conflicting.)
- "20": No Match, too many possible returns

DNM (column "DNM\_CODES"):

- UM (Unmatchable Record): General Delivery, Invalid or no name
- NM (Non-Matched Record): Valid address that does not appear in the DNM database (a.k.a. person hasn't moved)
- UC (Unapplied Change): Matched to DNM but not purged

Move Update Extras (column "MVUP\_CODES"):

#### Character Position 1 & 2 Deceased List.

- UD (Unapplied Deceased): Matched to deceased list but not purged
- NM (Non-Matched): Failed to match to the deceased list

## **Canadian Correction Codes**

The correct field returns a [NUMERIC][ALPHA] ([NUMERIC][ALPHA] ...) list of the correction codes. The numeric specifies which components of the address has been changed. The alpha specifies reason for the change.

Alpha Values

- A = Alternate
- F = Would not fit
- I = Incorrect Value
- M = Missing Value
- R = Rural validated on postal code only
- T = Typo in Value
- V = Verbosity

#### Numeric Values

- 01 Addressee and/or Additional Delivery Information
- 10 Complete Street Information
- 11 Civic number
- 12 Civic number suffix
- 13 Street name
- 14 Street type
- 15 Street direction
- 16 Suite keyword
- 17 Suite identifier
- 19 Delivery Information

- 20 Complete Route Service Information
- 22 Route Service Keyword
- 24 Route Service identifier
- 30 Complete PO Box/Bag Information
- 32 PO Box/Bag keyword
- 34 PO Box/Bag identifier
- 40 Complete General Delivery Information
- 42 General Delivery keyword
- 50 Complete Delivery Installation Information
- 52 Delivery Installation Area Name
- 54 Delivery Installation Type
- 56 Delivery Installation Qualifier
- 60 Municipality
- 62 Province
- 64 Postal Code

# **Canadian Validation Codes**

V - Valid: The address did not need to be changed.

- C Corrected: The address changed from input.
- U Uncorrectable: iAddress was unable to provide a correction for this address.
- G Foreign: The address is foreign to Canada.

F - Failed: The address caused an error during correction, contact Flagship Software Support.

### **US Correction Codes**

#### Brief Description of Us Correction Codes

Code	Definition
AA / A2 / A3 / A5 / A6 / A9 /AU / BB / CC	
/ DD / D1 / D2 / EE / E1 / E2 /E3 / E4 / E5	Address Corrected / Valid
/ FF / F1 / G1 / II / I1/ HH / H1/ RR / S1	

/ S1 / S2 / S3 / UA / UB / UC / UD / U1 / X1	
/ Z0	
KK / Z1 / Z2	Address Uncorrectable
A1	No Zip + 4 match
A7	Rejected due to EWS
A8	Address not specified
AC	Multiple County's defined
G4	Street Number out of Range of alias street match.
ננ	Failed to Match last line of address
К1	Missing / Incorrect street Directional(s)
К2	Missing / Incorrect street suffix
MA / MC / M1 / M3	Missing Street Number
MB	Street Name Not Found
MD	Firm Name not matched
NA / NB / NC / N1 / R1	Missing / Incorrect Secondary Number
P1 / P2 / P3 / Q1 / Q2	Missing / Incorrect RR/HC/PO Box Number

Extended Description of Error Codes

Code	Definition
AA	Record Matched to the ZIP+4 File This footnote is set any time that a record is matched. This is the equivalent of having a return code of 31 or 32.
A1	Record Not Matched to the ZIP+4 File This footnote is set every time that a record does not match to the ZIP4 file, but makes it through basic parse and last line validation. This is the equivalent of having a return of 21 or 22.

A2	Alias Street Name Matched This footnote is set every time a match is made to an alias street name.
A3	Alternate Record Matched on the ZIP+4 File This footnote is set every time a match is made to an alternate ZIP4 record. An alternate record contains a different presentation a street name for a 'base' ZIP4 record. The addon code is the same for the alternate and the base record.
A4	Match to Small Town Default A small-town default match does not actually match to an existing ZIP4 record, but gives back a return code of '31' and an addon code of '9999'. This condition exists when the input ZIP code is flagged as a 'Small Town' and only accepts 'GENERAL DELIVERY' type addresses, but a street-style or PO BOX address was presented on input. Since there are no actual street or PO BOX deliveries, all addresses in this ZIP code will get a 'default' addon of '9999'.
A5	Match to Unique ZIP Default A Unique ZIP code is a ZIP code set up by an institution (like a university) or a business that handles its own mail delivery. The USPS collects the mail at the post office, and the institution picks it up and distributes it internally. Even though it is possible to have ZIP4 records for Unique ZIP code, most institutions have addressing schemes that are not fully populated in the database. Therefore, when an input Unique ZIP code is found, and the input address is not found, a return code of '31' is given back, along with a 'default' addon of '0001'.
A6	Match to a Highrise Default Alternate record This footnote is set when a Highrise Default Alternate style address match is made. This condition exists when an input address contains the secondary number (an apartment, suite, etc.) along with a building name. No primary number or street name is given. For example: 456 FEDERAL BUILDING The coder will take this address and turn it back into a street-style presentation. 123 MAIN ST STE 456
A7	Address rejected due to EWS See the chapter titled 'EWS System' for information on how EWS works.
A8	Possible dual address detected This footnote is set when a 'dual address' may be present, such as: RR 3 BOX 123 456 MAIN ST Since there are 2 possible addresses available, the Coder will not choose

	which one to parse and return. This address construct results in a 21 return code.
A9	DPV used to break ZIP4 multiple response In some cases when a multiple-response is found during ZIP4 address processing, the DPV engine can be used to break the tie. During this process, all the candidate records are queried against the DPV database. If one and only one record is found to have a positive DPV confirmation, then this record will be chosen for the match, and a single response code is given back from the address lookup process. This footnote is turned on under this condition.
AC	ZIP+4 Level county name is different than the ZIP Code level Note: This footnote will only be returned if the ZIP4_COUNTY parameter is specified in either the configuration file or the AC_OPEN_T structure. See the 'Configuration File' chapter for details on when this footnote is set.
AU	Unique ZIP default information returned.
BB	DPV match, all components. A DPV match was made using all the components of the address (primary and secondary number).
CC	DPV match primary number, not secondary number A DPV match was made with the primary number only. A secondary number was present on the input address, but was not used for DPV.
DD	Corrected City Name and/or State Information The city or the state was changed.
D1	Input city name was non-mailing, corrected (AC) The input city name was a non-mailing name for the matched ZIP code. The output address contains the corrected city name.
D2	ZIP+4 State code different than ZIP Code default This footnote indicates that the state code on a matched ZIP4 record differs from the state code assigned to the ZIP code of the output address. This can happen when a physical address exists in one state, but the mail is delivered to that address from another state. In some geographical situations, it is better for a post office in one state to deliver mail to addresses that are in a neighboring state. In these situations, the output address of the Coder will still show the state code of the delivering post office. The state code of the physical address will be shown in the matching ZIP4 record (the matched_rec field of the AC_OUTPUT_ADDR_T structure.
EE	Corrected Primary Address (E1 or E2 is on) The primary address line was corrected.
E1	Corrected primary address component (AC) A directional or suffix address component was added, deleted, or changed.

E2	Corrected primary street name (AC) Set if the street name spelling was changed.
E3	Primary address line standardized (AC) Set if any portion of the primary address line was standardized.
E4	A questionable address standardization was made. This can happen when an input address looks like 123 MAIN ST BOX 123 (a possible dual address), and it gets standardized to 123 MAIN ST # 123.
E5	The first letter of the street name has been added or changed.
FF	Corrected Secondary Address Data Set when the secondary number or unit designator was changed. Examples of allowable secondary number changes are reversing alpha-numerics, and adding or deleting dashes: A5 => 5A A5 => A-5
F1	Military match A match was made to a ZIP Code that has been determined to be a Military ZIP Code.
G1	General Delivery match A match was made to a General Delivery ZIP+4 record.
G4	Out of range alias match A match was made to an alias street name, but the primary number did not match the allowable range for the alias street name. This is a 'no-match' condition and a return code of '21' is given back.
II	Firm and address swapped (AC) The firm line and the address line were swapped to make the match.
I1	Urb moved from address line (AC) A PR Urbanization was found in the address line and moved to the Urbanization line.
НН	ZIP Code Changed The input ZIP code was changed.
H1	ZIP code added (AC) No ZIP code was in the input address, and one was added.
JJ	Failure to Match Last Line of Address The last line was not able to be matched. This is equivalent to the return code '11'.
КК	Multiple Match in Primary Address Field
K1	Multiple Match due to Missing/Incorrect Directional(s)
K2	Multiple Match due to Missing/Incorrect Suffix

MA	ZIP4 -Missing Street Number A primary number is missing from the input address.
MB	ZIP4 - Street Name Not Found The input street name could not be found in the ZIP+4 data file.
MC	ZIP4 - No Such Primary Number This is set when the input street name was found in the ZIP+4 file, but the input primary number could not be found with the given street name.
MD	ZIP4 - Firm Name Not Matched
M1	DPV -Missing Street Number A primary number is missing from the input address.
M3	DPV - No Such Primary Number This is set when DPV cannot validate the primary number, even though the address matched to a valid ZIP+4 range.
NA	ZIP4 -Missing Secondary Address Number A match was made to a ZIP+4 Highrise record, but no secondary number was present on the input address.
NB	ZIP4 - Secondary Number not found A match was made to a ZIP+4 record, but the input secondary number could not be found.
NC	Multiple Match in Secondary Address Field Set when a 'multiple response' condition occurs with highrise specific records, and one cannot be picked. The Coder returns the highrise default or street level record. For example: Input address is '123 MAIN ST # 4' and both APT 4 and STE 4 are present. NOTE: This footnote used to be called L.
N1	Missing Secondary Address Number for an Address located within a highrise For DPV, a match was made to a Highrise record, but the secondary number was not present on the input address.
P1	Missing RR/HC Box Number for rural-route style addresses, the BOX number was missing on input.
P2	RR/HC Box Number not found Currently not being set.
P3	Invalid RR/ HC/ PO BOX number.
Q1	Missing PO Box Number
Q2	PO Box Number not found
RR	DPV - CMRA match The CMRA flag was set in DPV.

R1	DPV - CMRA, no secondary number
S1	Seasonal record information present This footnote indicates that seasonal information is present. The seasonal information is in the 'seasonal' field of the AC_MATCH_INFO_T structure. Certain addresses receive mail only during part of the year. The 'seasonal' field contains a 12-character, NULL-terminated string indicating which months have mail delivery for the given output address. The field is a string of 'Y' and 'N' flags. Each of the 12 positions correspond to the 12 months of the year. A 'Y' value in a position indicates that the mail is delivered for that month. For example, the string 'NNNNYYYYNNNN' shows that mail is only delivered in the months ofMay, June, July, and August.
S2	SUITE Link information added to the address.
S3	Address matched to STOP Link.
UA	No PR Urbanization was given with the input address, but an Urbanization was found in the matched ZIP4 record. This Urbanization was returned on output.
UB	The input PR Urbanization was verified to be valid according to the ZIP4 record that was matched.
UC	The input PR Urbanization was not verified with the matched ZIP4 record, because the matched record contained a blank Urbanization field. The input Urbanization was retained in the output address.
UD	The input PR Urbanization was not verified with the matched ZIP4 record, because the matched record contained a different Urbanization name. The Urbanization from the matched ZIP4 record was returned with the output address.
U1	Unique ZIP Code Match A match was made to a ZIP Code that has been determined to be a Unique ZIP Code. See footnote A5 for more information on Unique ZIP Codes.
X1	IntelliZIP match This footnote indicates that a match was made using IntelliZIP logic. If a match is not made through normal address matching procedures, and if the input address contains a 9-digit ZIP code, then a reverse 9-digit lookup is performed. If the ZIP+4 record corresponding to the input 9-digit ZIP code closely matches the input address, then a match will be returned and this footnote will be set.
Zo	ZIPMOVE match A match was made to a ZIP Move address. ZIP Move represents a collection of addresses that have been affected by a ZIP code realignment (i.e. the boundaries for a ZIP code were redrawn). When this happens, some street segments will move from one ZIP code to another. This can cause problems

	when an input address contains the 'old' ZIP code, and the address matching software tries to change the address to keep it in the old ZIP code instead of moving to a new ZIP code. To help out, the USPS keeps a separate file of these situations that are used by address matching software. This footnote is set when the input address contains the old ZIP code, and the Coder changed it to the new ZIP code. An exact match must be made to the address in order for this to happen.
Z1	ZIPMOVE no match due to component change The best match available was to a ZIP Move address, but the input address was changed to get there. This is not allowed, so a no-match condition is made with a return code of '21'.
Z2	ZIPMOVE no match due to invalid new ZIP+4 This represents a data inconsistency with the USPS ZIP4 and ZIP Move files. The address was no-matched with a return code of '21'

# iAddStatus Field

Character Position	Element	Values
		Defines the type of record in the Address Lookup and the Text Lookup file. The values are:
		1 = Street Address Record
		2 = Street Served by Route Record
		3 = Lock Box Address Record
		4 = Route Service Address Record
1	Record Type Code	5 = General Delivery Address Record
		A = Building Name Record
		B = Large Volume Reciver Name (Street) Record
		C = Government Name (Street) Record
		D = Large Volume Receiver Name (Lock Box) Record
		E = Government Name(LockBox) Record

		F = General Delivery Name Record
		r = General Denvery Name Record
2	Address Type Code	A code denoting wheather an address is in the for of a civic address or in the form of a delivery installation address. Valid values are: 1 = Civic (Street) Address Format 2 = Delivery Installation (Station) Address Format

	Delivery Mode Type Description	The part of the Delivery Mode which identifies the type of delivery service
		A = Delivery to Block Face Address
		B = Delivery to an Apartment Building
		E = Delivery to a Business Building
		G = Delivery to a Large Volume Receiver
		H = Delivery via a Rural Route
3		J = General Delivery
		K = Delivery to a PO Box (not a CMB)
		M = Delivery to a Large Volume Reciver (PO BOX)
		T = Delivery via a Suburban Service
		X = Delivery via a Mobile Route
		Z = Postal Code is retired (No further delivery to this code)
4 - 5	Questionable Flags	QB = Questionable PO Box
		QR = Questionable Rural