

How to prepare **Periodicals** with

MAILERS⁺4[®]



How to Prepare **Periodicals** using MAILERS+4

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To view PAVE Gold Presort categories: MelissaData.com/pave.

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Welcome to Periodicals Mailing with MAILERS+4

If you distribute a newspaper, magazine, or other publication and your primary goal is to transmit information to subscribers or requesters, this Periodicals Mailing Guide is for you. When Periodicals mail is prepared and sorted according to USPS® standards, it may be eligible for a reduced rate. All Periodicals mailings fall within a regular or preferred rate structure with preferred rates applying to publications that meet Nonprofit, Classroom, Science-of-Agriculture, or In-County standards. The preparation standards for regular and preferred automation rates are identical. They are also identical for regular and preferred nonautomation rates.

We've provided a checklist of the mail preparation and sortation steps that are required to process a Periodicals mailing in MAILERS+4.

Other sources of information are the MAILERS+4 User's Manual and USPS guides such as the Domestic Mail Manual (DMM®) and Quick Service Guide (QSG).

Good luck with your Periodicals mailing. If you need further assistance, please call our customer service or technical support staff at

1-800-MELISSA (800-635-4772)

Periodicals Qualification Types

- General Publications
- Institution & Society Publications
- State Agriculture Dept. Publications
- Requester Publications
- Foreign Publications

Periodicals Mailing Standards

- The stated frequency of publication must be at least 4 times a year.
- The publication continuity must be maintained by serializing articles or by applying the same style, theme, format, or subject matter to each successive issue.
- The publication's primary purpose must be to share information.
- Each issue's primary distribution must be made before the next issue.
- The publication must consist of printed sheets.
- The publication's advertising must not exceed 75% of its content.

Step 1 — Apply For Periodicals Mailing Privileges

Checklist:

- Get a Periodicals mail permit from your local Post Office™.
- Obtain authorization from the Post Office to set up an advance deposit account.
- Be prepared to pay an Address Correction Service fee for each notice issued (ACS™ is mandatory for all Periodicals publications).
- Pick up materials and supplies from the Post Office, including rubber bands, trays and sleeves.
- Purchase tie straps.
- Get relevant books and pamphlets (i.e. QSG Pub 95).

Obtain a Periodicals Mail Permit

You must have a valid mailing permit before you can mail at Periodicals rates. You'll pay a fee when you apply and when you renew the permit. You can get Form 3501, 3501-A, 3502, or 3511 from any Business Mail Entry Unit (BMEU) or Postal Business Center (PBC), but you must turn it in at the Post Office to which you will bring your mailings.

How to Apply - complete and turn in the application: Form 3501 (General), 3501-A (News Agents or Foreign), 3502 (Institutions & Societies), or 3511 (Requester).

Additional Resources

DMM 707.5 and 707.16

Payment Requirement

Advance Deposit Account

An advance deposit account is required for Periodicals postage payments. This account must be at the original or additional entry Post Office (with the exception of CPP or P950). An ID entry must also be printed on the first 5 pages or last 3 pages of your publication. Permit imprints, meter stamps, postage stamps, or precanceled stamps may not be used as postage for periodicals.

Database Files

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

Data Entry Using MAILERS+4

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

Step 2 — Designing Your Mailpiece

Checklist:

- Verify that your mailing qualifies for automation processing.
- Measure and weigh your mailpiece to determine if it qualifies for letter or flat rates.

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

Making Your Mailpiece Automation Compatible

It is important to make your mailing automation compatible as it will allow you to qualify for reduced automation rates.

Specific Regulations

For specific regulations that apply to the design of your mailpiece, see Notice 3-A (Letter Size Mail Dimensional Standards Template), DMM 201.3, 301.3 & 701.3, and QSG 707f, 201a & 301a, and page 14 of “Are Periodical Rates For You?” from the “Periodical Rates Information Packet.”

Additional Resources

DMM 602, 363.5, 707, 708.3
QSG 602, 201a, 301a

USPS Publication 28
MAILERS+4 User's Guide Chapters 6 & 8

Order Your Mailing Supplies Online

Tie straps, tray and sack tags, labels, and more!

Melissa Data's new online Mailing Supplies page offers a convenient place where you can get materials for your direct mail projects.

You can access our Mailing Supplies web page directly from the Internet or from inside MAILERS+4. From MAILERS+4, go to the new Internet menu and select Mailing Supplies.

We now have tie straps, tray tags, sack tags, and labels available for purchase on the Mailing Supplies page. And there's more to come!

Mailing Supplies will be continually updated with new products, so check back often.



Just go to www.MelissaData.com/software/mailing/supplies.htm

We want to be your online mailing resource center!

Verifying Addresses Using MAILERS+4

MAILERS+4 makes the process of standardizing addresses and adding ZIP + 4 codes simple and easy.

- 1 Select **List > Address Check > Options**.
Select appropriate options for this mailing, and click **Go**.
- 2 MAILERS+4 verifies your addresses against the USPS National Database and displays the results.
- 3 Select **Resolve Addresses** and highlight the address you want to resolve.
- 4 Click **Resolve**. Here you can edit the address and search the database for possible matches.
- 5 Find and highlight the listing that matches the **Range, Directional, and Street Name** for your record.
- 6 Click **Replace** to resolve the error, replace the address data in your list, and add the ZIP + 4 Code.
- 7 When you are finished resolving addresses, click on **Close**.
- 8 Click **CASS (Form 3553)** and complete the on-screen information.
- 9 Select **CASS Print** and your CASS Form 3553 is ready for you to take to the Post Office.

Address Change and Correction Services

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

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

MAILERS+4 now offers the option of Smart Mover, which uses the Post Office's NCOA^{Link} technology to do change of address processing from within MAILERS+4 itself. For more details, call 800-635-4772.

Identifying Duplicate Records

On the average, every list contains 10% duplicate records. Run Duplicate Check to mark and/or remove these costly duplicates.

- 1 Select **List > Duplicate Check > Options**.
- 2 Select the search criteria that you want MAILERS+4 to use to find the duplicate records and click **Go**.
MAILERS+4 will process and compile the duplicate records.
- 3 **View** the duplicates on screen for editing, or **Print** out the results report for future attention.
- 4 To edit records, or mark records for deletion, refer to the MAILERS+4 User's Manual.

How do I remove duplicates from my list?

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

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

Preparing Your List for Servicing Using MAILERS+4

- 1 Select **Services > Change of Address** and click on a desired payment option.
- 2 Format the required fields.
- 3 MAILERS+4 will assemble and compress your list. Submit the compressed file to Melissa Data using FTP or e-mail.
- 4 Update your original list with returned data. Melissa Data will notify you via e-mail or telephone when your file is ready for return. Average turnaround is within 24 hours.

Additional Resources

DMM 602, 363.5, 708.3, 707.13
QSG 201a, 301a, 602
Pub 28 (Postal Addressing Standards).
User's Guide Chapters 6, 7.

Step 4 — Presorting For Periodicals Discounts

Checklist:

- Measure and weigh your mailpiece and enter the correct data in the Presort Wizard.
- Select the appropriate Periodicals categories to sort to.

Sortation Categories

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

To receive automation rates, addresses must be CASS verified, have a ZIP + 4 code, and use a barcoded label.

To receive non-automation rates, addresses must have a valid 5-digit ZIP Code™ and all presorted packages must be rubberbanded.

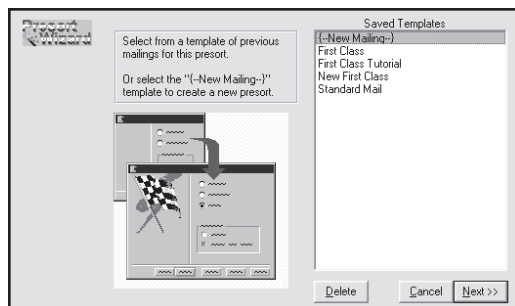
Miscellaneous pieces are known as residuals when their addresses are international or have an invalid or missing ZIP Code.

How do I accurately measure my mailpiece?

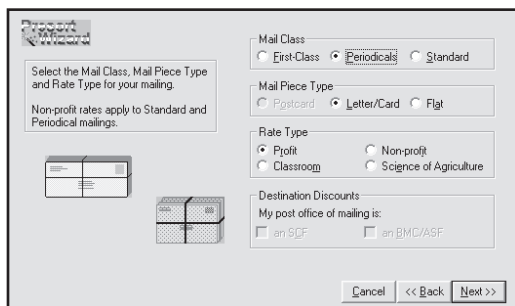
- 1 Measure the height of a sample stack to the nearest 1/8 inch and enter this amount as the thickness.
- 2 Weigh this stack to the nearest 0.0001 pound or 0.1 ounce and enter this amount as the weight.
- 3 Enter the height and width of a piece.

Using MAILERS+4 To Presort For Periodicals Discounts

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



- 3 Fill in the **Post Office of Mailing** information (*This is where you obtained your Periodicals permit*). You should **Save as Default** if this is the only Post Office you use for Periodicals mailings. Click **Next >>**.
- 4 Choose the Periodicals Mail Class and mark your selections for Mail Piece Type and Rate Type, then click on **Next >>**.



- 5 The information you place in the **Sample Size and Weight** screen is very important for accurate tray sortations and weight rates.

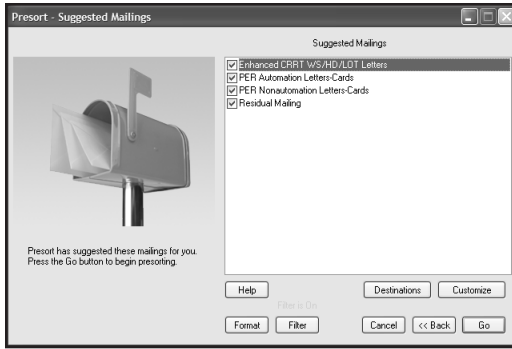
Enter the size and weight of your mailing sample and the dimensions and aspect ratio (length divided by height) of a mailpiece. Check **FSM 1000** if your Post Office of mailing has this machine and you need to presort oversize flats. To advance to the **Periodical Information** screen, click on **Next >>**.

- 6 Complete the **Postage Statement Information** (payment type does not apply to Periodicals mailings). Click **Next >>**.

- 7 In the **Publication Information** box, enter the descriptive information for your Periodicals mailpiece. If your mailing will be delivered within the county where it is mailed, check **Use In County** to use the 5-digit County Code in your **FIPS** field (make sure there is a formatted **FIPS** field in your list). To add subscriber data to your presort, choose the options that apply to you (you will need to format and populate a subscriber field). If your periodical has a weekly or greater publication frequency, check **News**. To advance to the **Mailing Summary** screen, click on the **Next >>** button.

Additional Resources

DMM 707.1, Notice 123, QSG 707a, Postal Guidelines (Mail Preparation), MAILERS+4 User's Guide Chapter 9.



- 8 The Suggested Mailings window indicates which Periodicals presort levels your list might qualify for and the levels it will attempt to sort to. To begin the Presort process, click on the **Go** button.

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

Checklist:

- Review the Qualification Report & Postage Statement and make a copy for your records.
- Sign the Postage Statement certifying that you are in accordance with all USPS rules & regulations.

- Your **Total Cost** and Savings of the mailing compared to single piece First Class postage. Click **Next >>** to advance to the Reports screen.
- 1 Print the **Qualification Report** for all of the presorted mailings listed. Highlight one mailing at a time, select **Qualification Report** and click **Print**.

Postal Forms and Reports

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

Printing Postal Forms Using MAILERS+4

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

- The rate levels your mailing qualified for after presorting.
- The number of pieces and cost at each rate.

| Mailing | Containers | Packages | Pieces | Amount |
|--------------------------------------------|------------|----------|--------|---------|
| Enhanced CRRT w/S/HD/LOT Letters | 39 | 59 | 1088 | 336.064 |
| PER Automation Letters | 2 | 44 | 717 | 201.955 |
| *None Qualified* PER Nonautomation Letters | 0 | 0 | 0 | 0.000 |
| Residual Mailing | 1 | 1 | 3 | 1.830 |

Presort Time: 7.765 seconds Total pieces: 2608 Total cost: \$539.749

Any mailing identified by *None Qualified* indicates that the mailing did not have enough pieces to create a valid mailing.

- 2 Select **Postage Report>>**, highlight the qualified mailings that you want to mail, and select **Print** to get the required Postage Statement.

Step 6 — Printing Required Tray Tags for Containers

Checklist:

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

Tray Tag Information

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

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

Office of Mailing - shows the origin or entry Post Office.

Printing Tray Tags Using MAILERS+4

During the presorting process, MAILERS+4 generates the required tray tags.

- 1 From the **Presort Reports** screen, select **Tray and Sack**.
- 2 Click **Print**.
- 3 MAILERS+4 sends the tags to your printer.

The diagram illustrates four examples of tray tags. Each tag contains the following information:

- Destination Line:** SAN CLEMENTE CA, PER LTRS 5D BC, RSM CA 92688 123456789
- Content Line:** PER LTRS 5D BC
- Office of Mailing:** RSM CA 92688 123456789
- Barcode:** A large barcode representing the destination and content information.
- ZIP Code:** 92672
- Facility Prefix:** 926723421 123456789 000018

Labels with arrows point to the following fields:

- Destination Line:** Points to the top line of text on the central tag.
- Content Line:** Points to the second line of text on the central tag.
- Office of Mailing:** Points to the third line of text on the central tag.

The four tags shown are:

- Top-left: SAN CLEMENTE CA, PER LTRS 5D BC, RSM CA 92688 123456789, 92672
- Top-right: SAN CLEMENTE CA, PER LTRS 5D BC, RSM CA 92688 123456789, 92672
- Middle-left: SAN CLEMENTE CA, PER LTRS 5D BC, RSM CA 92688 123456789, 92672
- Middle-right: SAN CLEMENTE CA, PER LTRS 5D BC, RSM CA 92688 123456789, 92673
- Bottom-left: PER LTRS BC SCHEME, RSM CA 92688 123456789, 26
- Bottom-right: SANTA ANA CA, PER LTRS BC SCHEME, RSM CA 92688 123456789, 926

Additional Resources

DMM 707.21

MAILERS+4 User's Guide (Chapter 9)

Step 7 — Printing Your Address Labels

Checklist:

- ❑ Verify that the data on the label is printed according to USPS guidelines.
- ❑ Verify that the automation barcodes are not truncated and that they have 62 bars.

Formatting Addresses Correctly

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

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

Using Proper Type Style

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

- Use simple sans serif type (such as “Arial”) with uniform thickness.
- No bold, italic, extended or condensed type styles.
- Point size between 10-12 points.
- No kerning or overlapping of characters or words too close together.
- Address block cannot be skewed more than five degrees. Be careful when attaching labels.
- Uppercase characters throughout the address block are preferred over upper/lower case characters.
- No punctuation marks.
- Left-justify every line in the address block.
- Use two-letter state abbreviations.
- Use one space between the city and state, two spaces between the state and ZIP + 4 code.



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What are the Elements of an Address Label?

- 1 City, State ZIP + 4
- 2 Delivery Address
- 3 Suite / Apartment
- 4 Company
- 5 Name / Attention
- 6 Optional Endorsement Line
- 7 Intelligent Mail® Barcode or:
- 8 POSTNET™ Barcode

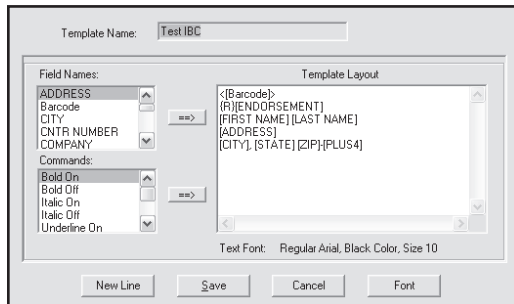
Do I need an Optional Endorsement Line?

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

| | | |
|-----------------------------------------------------------------------------------|---|-----------------|
|  | = | 5-DIGIT 12345 |
|  | = | 3-DIGIT 123 |
|  | = | MXD ADC 123 |
|  | = | ALL FOR ADC 123 |

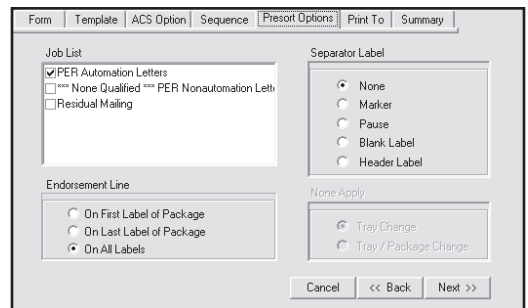
Printing Address Labels Using MAILERS+4

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



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

- 5 Select the following Presort Options:
The mailings from the **Job List** you wish to mail; to print the Endorsement Line on all pieces; and to add a **Header Label** between tray changes. Click on **Next>>**.



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

Additional Resources

Pub. 25, Pub 221 & Notice 67
DMM 602 & 708.4

QSG 708

MAILERS+4 User's Guide Chapter 10

Step 8 — Putting Labels on the Mailpiece

Checklist:

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

Return Address - The return address must be above the OCR read area and should be printed in a type size smaller than the type size used in the delivery address.

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

Address Labels

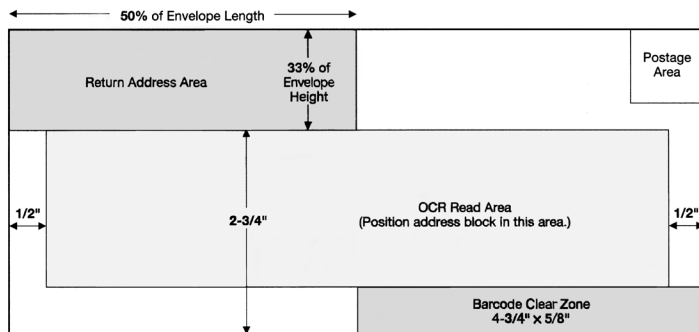
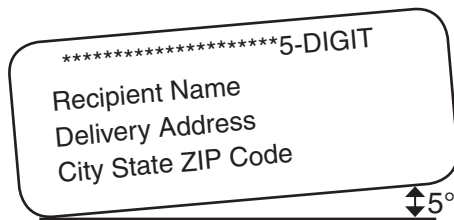
Be sure to use address labels that are at least 3” long to ensure proper fit of the barcode. When applying labels to your mailpiece, be sure to place the label as straight as possible within the OCR read area so there is less than a five degree skew.

Mailpiece Clear Zones

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

OCR Read Area - Extraneous (non-address) printing in the OCR read area can cause the rejection of the mailpiece. Be sure to have at least 1/2” all the way around the label.

You may place non-address printing such as company logos, advertising, and die cuts within the OCR read area only if you position this printing so that the lowest point is above the delivery address line.



(Not Actual Size)

Step 9 — Assembling Your Mailpieces Into Containers

First - Prepare Automation Sorts

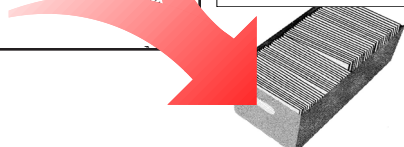
It is easiest to start assembling the automated pieces first because packaging is not allowed. Since the endorsement line reflects each tray, match up pieces to the “Tray Zip” and “Tray Level” categories on the Qualification Report and place the mailpieces into the tray. Pieces in full trays should not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

In the above example, place the pieces from ZIP Code 92672 into the three trays labeled 92672.

```
Report: USPS Qualification Report
Entry: RSM CA 92688
Sort: Periodicals, DMM 707.24
File: SanClemDPV2008.dbf
Publication Name: Mailing Monthly
MAILERS+4 (Build 1764) ZAP ZC-20071206
```

| Tray # | Tray Size | Tray Lvl | Tray ZIP | Group Dest |
|--------|-----------|----------|----------|------------------------------------------------|
| 1 | 2 | 5DG | 92672 | 92672 |
| 2 | 2 | 5DG | 92672 | 92672 |
| 3 | 2 | 5DG | 92672 | 92672 |
| 4 | 2 | 5DG | 92673 | 92673 |
| 5 | 2 | 3DGS | 926 | 926 |
| 6 | 1 | 3DGS | 926 | 926 |
| 7 | 2 | MAAD | 901 | A117 A170 A139 A10 A13 A2 A2 |

*****5-DIGIT 92672
 Recipient Name
 Delivery Address
 City State ZIP Code



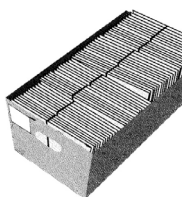
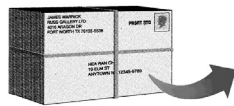
Second - Prepare Non-Automation Sorts

```
Report: USPS Qualification Report
Entry: RSM CA 92688
Sort: Periodicals, DMM 707.22
File: SanClemDPV2008.dbf
Publication Name: Mailing Monthly
MAILERS+4 (Build 1764) ZAP ZC-20071206
```

| Tray # | Tray Size | Tray Lvl | Tray ZIP | Pkg Dest | Zone | Copies |
|--------|-----------|----------|----------|----------|------|--------|
| 1 | 1 | 5DG | 92624 | 92624 | 1&2 | 121 |
| 2 | 1 | 5DG | 92629 | 92629 | 1&2 | 74 |
| 3 | 1 | 5DG | 92651 | 92651 | 1&2 | 55 |
| 4 | 2 | 5DG | 92672 | 92672 | 1&2 | 142 |
| | | | | 92672 | 1&2 | 142 |
| | | | | 92672 | 1&2 | 142 |
| | | | | 92672 | 1&2 | 74 |
| 5 | 2 | 5DG | 92672 | 92672 | 1&2 | 68 |
| | | | | 92672 | 1&2 | 142 |
| | | | | 92672 | 1&2 | 142 |

In this example, each 5-DG package gets placed into its respective tray.

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



Third - Label Trays

Checklist:

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

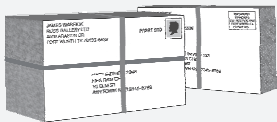
Place a tray tag securely in the label holder on each tray. Do not tape labels onto trays or label holders. Do not make handwritten changes to preprinted barcoded labels—the machines read only the barcode.



How do I rubberband packages?

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

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

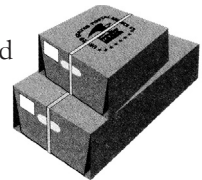


Fourth - Sleeve & Strap Trays

Sleeve all the trays and strap non-local trays for transport.

Strapping is not required for trays going to your local Post Office.

See your Business Mail Entry Unit (BMEU) manager for details.



Additional Resources
DMM 245.7 and 707.22
QSG 707d, 707e, 707f & 707g

Step 10 — Take It All to the Post Office

Checklist:

- Signed CASS Form 3553.
- Signed Postage Statement.
- Printed Qualification, Bundle and Container Reports.
- Sleeved and strapped trays.

Verification & Acceptance of Mail

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

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

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

Sources of Postal Information

Business Mail Entry Unit (BMEU)

Name of Unit Manager Extension

Additional Contact Extension

Address

Telephone Number

Telephone Number (Account Balance Information)

Hours of Operation

Postal Business Center (PBC)

Address

Telephone Number

Hours of Operation

MELISSA DATA

22382 Avenida Empresa
Rancho Santa Margarita, CA 92688-2112

800-635-4772

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