Mailing List Processing

Before Getting Started

Please be aware that we cannot create mailable addresses from incomplete, incorrect or improperly formatted data. Also, while our processes and software do a great job of standardizing and updating addresses (if using NCOALink®), it's normal to see 8-10% in returns or undeliverable pieces per mailing. With a data cleansing procedure, we can further reduce the potential returns you would see by an average of 5%.

Standard List Formats

We prefer lists to be submitted in one of the following common formats:

.CSV   .XLS   or .XLSX

Additional fees may apply if it's necessary for our team to adjust or manipulate your data. If you're unsure about your mailing list meeting our **specifications, feel free to contact your Customer Service Rep.**

Required Fields for a Successful Mailing

The following fields are required by USPS in order to be properly Cass certified, run through the NCOA process and have a successful mailing. Name and Company fields can have values for 1 or both of the 2 fields to be successful. The NCOA process will read from the name field and the company field in order to find changes to address. If there is more than one address included in the record, for example home vs. work, or billing vs. shipping, please remove the address fields that you do not want used.

Name	Company	Address1	Address2	Address3	City	State	Zip	Country

Organizing Your Mailing List

Databases come in all shapes and sizes. We recognize that as a result, mailing lists might not always be formatted exactly to our recommendations. However, due to our standard processes, lists that do not comply with our layout may incur additional fees if it's necessary to extensively manipulate the list into our layout in order to proceed. (You will find further examples of good and bad data files attached.)

If you are using an Excel database, and you have data in more than one Worksheet or Tab, be sure to let your Customer Service Rep know that you want the data in the multiple worksheets to be used. Also in Excel, PLEASE DO NOT "HIDE" COLUMNS OR ROWS. Some people believe they can remove names from a mailing without deleting the record from the database by hiding the row in which the record appears. However, this does not prevent the record from being imported. "Hiding" is only a visual effect, and does not remove anything from the database.

Often, the database where you obtained your mailing list contains many more data fields than are necessary for the mailing. For example, customer numbers, phone numbers, file notes, etc. could be included in the database. While we can generally strip away the unnecessary data to run the mailing, **it helps if you send only the fields relevant to the mailing that need to be printed.** It is also beneficial to add a unique identifier for each record such as customer number so that we can provide changes to addresses back to you so that you can update your records.

	A	B	C	D	E
1	Name	Address	City	State	Zip
2	Chad Smith	1675 Faraday Ave	Carlsbad	CA	92006
3	Jim Jones	1234 Main St	Anytown	CA	90000

Good: All address information in different cells in the same row.

	A	B	C
1	Chad Smith	Jim Jones	
2	1675 Faraday Ave	1234 Main St	
3	Carlsbad, CA 92006	Anytown CA, 90000	

Bad: Address information separated into multiple rows.

Multiple List Files

The price for your mailing includes basic data set up. If you provide your mailing list in multiple files, there will be an additional charge.

Organizing Your Records

Due to the space allowed by the USPS for addressing, you have a maximum of 50 characters per field, including spaces and punctuation. Anything longer will be truncated. For example:

1. If a job title is long, "Vice President of Public Relations and Communications" will become "Vice President of Public Relations and Communicati".
   Recommended workaround: "VP of Public Relations and Communications"
2. If company and address are in the same field, "Jacksonville Company, Inc. 11350 Martin Luther King Blvd" becomes "Jacksonville Company, Inc. 11350 Martin Luther Kin".
   This address may not be deliverable as a result of the truncation. We recommend splitting them into two different fields.

◇	A
1	**Title**
2	VP of Public Relations and Communications
3	
4	

Good: Less than 50 characters per field.

◇	A
1	**Title**
2	Vice President of Public Relations and Communicati
3	
4	

Bad: Entries over 50 characters are truncated.

The fields in your mailing list will be inkjetted in the order displayed below:

- Name (Required if Company is blank)
- Title (optional)
- Department (optional)
- Company (Required if Name is blank)
- Address2 (optional)
- Address (required)
- City (required)
- State (required)
- Zip Code (required)
- Country (required if mailing outside the US)

An example would be:

- John Doe
- President
- Milk Company
- 2001 Sesame Street
- Topeka, KS 11111

But it could be as simple as:

- Resident
- 2001 Sesame Street
- Topeka, KS 11111

Foreign Addresses

Your mailing may include foreign addresses (note that addresses in Puerto Rico and the US Virgin Islands are NOT foreign addresses). You should indicate if you want the foreign addresses to be mailed. The postage on these is SUBSTANTIALLY higher than on US addresses, and there are additional processing costs as well. If you did not specify foreign addresses when we were giving you pricing, we assumed that you were doing an all US mailing.

Duplicate Removal

Your mailing list may contain duplicates. If you did not ask us to remove duplicates from your list ("dedupe") we mail to all addresses in your database. It is possible that while working with your mailing list we MAY notice duplicates, and ask you if you would like us to dedupe the list. However, there is no guarantee that we will notice. Mailing duplicates costs you extra in terms of postage and printing, and mail shop costs, and does not reflect well on your organization to the individual receiving duplicate mail pieces. While we do charge to remove duplicates, it is often more than offset by postage and other cost savings from a reduced mailing.

1. Dedupe by Name and Address (most common)

Fields containing name and address info will be compared. Only records that contain duplicate name AND duplicate address info will be removed.

a. The deduping process looks for EXACT matches. If there is any variation between the names or addresses of two records, the duplicate will not be removed. Also, only the first record will be maintained. For example:

Will not be deduped (Last names do not match):

Chad Scott	1675 Faraday Ave	Carlsbad CA 92008
Chad Sctt	1675 Faraday Ave	Carlsbad CA 92008

Will not be deduped (Address field does not match):

Chad Scott	1675 Faraday Ave	Carlsbad CA 92008
Chad Scott	1675 Fairaday Ave	Carlsbad CA 92008

May be deduped (Common first names in long/short form):

James Jones	1675 Faraday Ave	Carlsbad CA 92008
Jim Jones	1675 Faraday Ave	Carlsbad CA 92008

2. Dedupe by Address Only

Address field will be compared with all other records in the database. Only the first record will be kept. This may be preferable if your database has one listing for a husband and one for a wife, but you only want one mailing per household.

3. Do not Dedupe

List will be processed as-is, no records will be removed.

Address Standardization

After we receive your mailing list, we import it into our postal software. We then perform CASS processing (Coding Accuracy Support System), which is required by the Post Office to obtain discounted postage rates. CASS processing matches the address with the USPS database, standardizes addresses (for example, converting "street" to ST), assigns or corrects the plus-4 part of the zip code, and assigns the 2 digit delivery point which is needed to produce the address barcode.

Often, the software is unable to match some of your addresses. This may be because of a bad street name, a typo in the street address, or many other reasons. Many unmatched addresses can still be mailed, and there is a reasonable chance they will be delivered. However, there is also a reasonable chance they will not be delivered, the postage will be higher, and if they are delivered, it will take longer.

It is important that you let us know if you want us to mail the error addresses or not. If you don't let us know, we will mail all addresses that the USPS permits, even if they have address problems. For a small additional charge, we can produce a list of your error addresses, and provide a code for why the address is an error.

CASS processing will only verify that the address is valid it will NOT tell if the person still lives at the address. See move update below.

NCOA (Move Update)

Americans move frequently, on average every 5 years. Even if your mailing list is only 6 months old, as many as 10% of your addresses could be out of date. This rate could be much higher if your list is weighted toward younger and/or lower income people. When someone moves, and files a change of address with the Post Office, that information is captured in a database.

We can run your database against the change file, and give you the new address. All moves going back 48 months will be captured, and the most recent address will be provided. For presorted first class mailings, the post office requires that you update your list periodically. This requirement will soon apply to standard mail and non-profit mail as well.

Please note that Move Update will only provide a change of address if someone has actually filed a change of address notification with the post office. If someone moves without filing, there will be no record of the change.

Also, Move Update is generally not effective when mailing to individuals at companies. For example, if you have a record for Steve Smith, VP of Marketing at XYZ Corp, and Steve Smith left XYZ and was replaced by John Jones, Move Update will not provide this information. The reason for this is that people do not file change of address with the post office when they change jobs. Move Update will give you a change if the company itself moves, but not when individuals at the company move.

The Post Office requires all mailings addressed to a specific person or company to have the mailing list processed through NCOA.

Name or Current Resident

Depending on the type of mailing you are doing, you may want the mail piece delivered to the address on file, even if the person's name on your mailing list is no longer at that address. For example, if you are a roofer doing a mailing in an area that recently had a hail storm, you will want the postcard to stay at the house on your list, even if the person has moved. One way to accomplish this is by listing the person's name, followed by "Or Current Resident".

If you are sending a FIRST-CLASS mailing (including a small postcard), and you do not use Or Current Resident, the mail piece will be forwarded if the person has moved. Unless you use ancillary service endorsements (call us for explanation and cost) the mail piece will be forwarded, and you will not be notified of the forward. You will still have the outdated information in your database.

If you are sending a Standard or Non-Profit mailing, the mail piece may be left at the address, or may be thrown away by the post man. It is his option. If you use "Or Current Resident" in your list, the mail piece will stay at the address, even if the person has moved.

Please specify whether or not you want us to use "Or Current Resident" in the address label.

✉ **Mailing List Processing**

List Verification

CASS Certify
Required on all discounted postage mailings
CASS Certifying corrects and standardizes addresses, it also adds missing address information, such as ZIP codes, cities, and states to ensure the address is complete. Delivery point validation is also performed to verify whether or not an address is a deliverable address and checks against the USPS database to update addresses that have been renamed or renumbered.

Presorting
Presorting puts addresses in presort order for discounted rates. It also generates the postage statement and postage costs.

NCOA Certify
Required for all Presorted First-Class Mailings and all Standard Bulk Mailings within 95 days of mailing date
NCOA (National Change of Address) is a secure dataset of approximately 160 million change-of-addresses going back 48 months that enable mailers to update mailing lists with new addresses for individuals, families and businesses that have moved. It will also indicate foreign moves and people who have moved with no forwarding address.

Optional Services

Geocode Filtering
Geocode filtering is most commonly utilized for mailers with large, possibly nationwide, databases to reduce the number of addresses by targeting a smaller area. A radius in miles is defined around a central location address. Any addresses in the database that fall outside the targeted area are then discarded from the list.

You can use the GeoCode Append in two ways:

- Method 1 General Distance: Determining the approximate distance between a mailing address and multiple destination address zip codes, this is a great append if you are comparing mailing addresses to a list of large regional destinations.

- Method 2 Rooftop-Rooftop Distance: Determining a precise distance between a mailing address and multiple destination addresses which improves targeting of the closest destination to each person's mailing address. Great for determining the closest franchise store, or even the closest three, to a particular mailing address.

Postage

Postage Permit

Using a postage permit is the most popular and convenient way to pay postage. A postage permit is printed in the upper right corner of a mailpiece within the indicia, or postage block. ArdaiusGroup holds permits for Standard and First Class Presorted Mail. You can choose to use AradiusGroups permit or use your own.

Stamps

For any mailings that do not qualify for bulk mailing rates, we do offer traditional postage stamps for your mailing.

Postage Funding: Estimated vs Actual

It is our goal to always provide you the best postage discounts available. Exact postage can only be determined by processing your files through our software and this is an exacting process that must be scheduled along with our other client's processing needs. In order for us to succeed for you, we have adopted "Postage Estimating" as a resolution to getting you a relatively accurate postage amount that will fund the majority of the pieces in your mailing.

Advantages:
  - Quicker turnaround of postage funding.
  - We credit your invoice if the actual postage is less than anticipated and we bill you if the difference exceeds the estimate.

Checklist

When preparing a mail piece, the following is a helpful checklist:
- Choose a class of mail
- Determine the size and shape of your mail piece
- Compile your address list
- Determine whether you will use AradisuGroup's postage permit or your own
- Fill out the attached Bulk Mail Information form
- Submit your mail piece to AradiusGroup for production