



ACS People Suite – Mail Modules



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Mail Modules

Here you can browse the user guides for ACS Cass It and Max It.

ACS CASS It! provides your church, school, or organization with the tools to CASS™ (Coding Accuracy Support System) certify your mailing addresses and meet United States Postal Service® (USPS) requirements for address verification.

ACS Max It!® is a bulk mailing tool that works in conjunction with the ACS Cass It!™ and ACS People and Organizations modules. After you CASS™ (Coding Accuracy Support System) certify your mailing with ACS CASS It, Max It presorts your mailing addresses to meet United States Postal Service® (USPS) requirements for bulk mail discounts and sorts your mailing so that you receive the highest discount possible.

We've also listed some common tasks, or you can enter a search term below to see help topics for a particular task.

Installing the Mail Modules

You can download the mail modules installation file as well as the updates from the ACS Client Portal. The install is for both Cass It and Max It, depending on which modules you own. When you run this install on a workstation using the network version of ACS and you only own Cass It, you will need to manually run this install on each workstation. When you install the mail modules on a workstation using the network version of ACS and you own both Cass It and Max It, the other workstations will be prompted to run the install also. The same applies to the updates; if you run the mail modules update on one workstation, the other workstations will be prompted to run the update as well.

1. Download the Mail Modules Install (**MMInstall.exe**) from the ACS Client Portal.
2. Double-click the file to run it. Follow the on-screen instructions.

Terminal Services

You can also install the Mail Modules on Terminal Services. In the Terminal Service session, in the Add /Remove Program window, click **Add New Program**. Select the location where you saved the Mail Modules download, and click **MMInstall.exe**. Click **INSTALL THE MAIL MODULES UPDATE** and follow the on-screen instructions.

Using Full-Service Intelligent Mail

OnDemand Clients

The PostalOne! application provided by the USPS® is only compatible with Windows® operating systems.

Effective January 26th, 2014, Full-Service Intelligent Mail will be required for automation discounts. With this change, you will need to get approved by the USPS by going through TEM Testing which is free. For each Max It! mailing, you will submit your reports electronically through a service called PostalOne!®, which will generate a Job ID. You will submit your PostalOne!® Job ID in person with your mailing to the Post Office. You will no longer submit your postal reports to the Post Office manually.

Note

To use PostalOne!, you will need to set up a free account with the Business Customer Gateway. When you register with the Business Customer Gateway, it will take about 24 hours for your account to be established. With this in mind, you will need to register for an account in advance.

What this Means for You

In order to meet the new USPS regulations, updates to the Mail Modules software have been implemented (download the latest Mail Modules update from the Client Portal). In order to install these updates, you must be on ACS version 11.5.1.4 or later. You will still use the Max It! software and follow the PRESORT Agent Wizard as before, but instead of printing your postal reports, you will submit them electronically through PostalOne!. There will also be a new window within the PRESORT Agent Wizard and a few new options to select in the process. Visit the Updating ACS Software to Meet Full-Service Intelligent Mail Requirements page to view the changes to the software.

Meeting the Full-Service Intelligent Mail Requirements Checklist

Using Full-Service Intelligent Mail requires planning and preparation ahead of time. All clients who want to receive the automation discounts should follow the checklist below:

1. Most Max It! users have a free Business Customer Gateway Account, but if not, you need to create one. This is also when you sign up for PostalOne!. You will need a USPS issued **Permit Number** in order to sign up, which you probably already have. If you do not have a Permit Number or are unsure what this number is, contact your local Post Office. **Note:** After you register for an account, it will take at least 24 hours for the account to be established. With this in mind, you need to set up your account in advance.
 - a. Obtain a free **Customer Registration ID**. This is automatically assigned through the Business Customer Gateway when you register for an account. **Note:** When you are registering for an account through the Business Customer Gateway, you will be asked to enter a Customer Registration ID; however, you can skip this field because you will be assigned an ID after you register. The USPS uses Customer Registration IDs to identify company locations.
 - b. Obtain a free **Mailer ID** from the USPS. This is also automatically assigned through the Business Customer Gateway when you register for an account. The USPS uses Mailer IDs to identify companies.
2. You also need an **IDEAlliance code** (you will enter this under the License Code field when processing your Max It! mailing).
3. Contact the Post Office where you plan to submit your mailing to find out their **Facility Identifier ID** (you will enter this under the Identifier field when processing your Max It! mailing). Each Post Office has a unique ID, and some have more than one. Make sure to get the Facility Identifier ID of the specific location within the postal facility where you will submit your mailing.
4. You will also need to obtain a **Nonprofit Authorization number**. You can contact your local Post Office to get this information, and you can also find this in the Business and Fees section of the Business Customer Gateway. (You may need to mention that this is for your bulk mailing.)
5. Ensure that you have the **9-digit Zip Code** for the Post Office where you will submit your mailing.
6. You must be on ACS version 11.5.1.4 or later, and you must load the latest Mail Modules update. Get these updates from the Client Portal. **Note:** You will need to load the Mail Modules update before completing the following steps.
7. Follow the PRESORT Agent Wizard as before when creating your Max It! mailing, however, you will also include the new information requested and save the Mail.dat files to submit to PostalOne!.
8. Get certified by going through TEM Testing (Test Environment for Mailers). This is free and takes up to 48 hours.
9. Submit the Mail.dat files electronically to PostalOne!.



Tip

Since you will upload your files to PostalOne! for each Max It! Mailing, you may want to create a desktop icon for it. You can do this by right-clicking the batch file and selecting Send to Desktop. [View instructions for downloading the batch file you need.](#)

10. Take your **Job ID** from PostalOne! to your local Post Office along with your mailing. **Note:** You can print out your Postage Statement from PostalOne! which includes this Job ID.

To find out more about the new USPS regulations regarding Full-Service Intelligent Mail, visit the USPS National Customer Support Center.

Meeting the USPS Move Update Requirements

If you use Standard or First-Class mail and receive discounts on your church, school, or organization's mailings, the USPS Move Update will affect your mailings, and you should ensure that you meet the new Move Update requirements.

The USPS Move Update took effect on November 23, 2008, and it requires any organization receiving Standard or First-Class mail discounts to keep an accurate address list and update this list at least every 95 days. The occupant's name associated with an address must also be correct.

The goal of the Move Update is to reduce the cost and waste from undeliverable mail, and although meeting the new requirements may seem difficult, it will ensure that your recipients receive your mailings in a timely manner and help our environment by reducing waste from mail that otherwise may have been disposed of.

The USPS offers four ways to meet the Move Update requirements, and the following sections describe these options and their advantages and disadvantages.

Address Change Service

Address Change Service provides address change information to mailers electronically by requiring participants to add a participant code to their mailings. This code is assigned by the USPS and must be printed in uppercase on the mailing or in the first line of the address block. All mailings except periodicals must also bear the ancillary service endorsement Address Service Requested or Change Service Requested.

When a mailing is undeliverable as addressed, the mail carrier sends it to a Computerized Forwarding System (CFS) unit. The CFS attempts to match the name and address of the intended recipient to a change of address if one is on file. If a match is found, the sender will be notified electronically, and the mailing will be forwarded. If no match is found, the mailing will be forwarded, discarded, or returned, depending on its mail class and ancillary service endorsement.

Cost — For First-Class Mail, electronic notices will be provided free of charge for the first two notices, and a charge of \$0.06 will be applied for each additional notice. For Standard Mail, the first two notices will be provided for a charge of \$0.03, and a charge of \$0.18 will be applied for each additional notice. For First-Class Mail, manual notices will be provided for a charge of \$0.08 per notice. For Standard Mail, manual notices will be provided for a charge of \$0.25 per notice.

Advantages — The move update requirement is fulfilled, and address change notifications can usually be sent electronically rather than manually.

Disadvantages — When an address change notification is received, you will have to manually update ACS with the new address. In addition, some smaller post offices lie outside the geographic reach of a CFS unit, and only manual address correction notifications can be generated in these areas.

National Change of Address Linkage System (NCOALink)

The National Change of Address Linkage System (NCOA^{Link}) is an address correction service provided to private sector companies by the USPS. Updated, computerized address change information for the entire United States is provided to these companies on a regular basis, and NCOA^{Link} contains approximately 160 million records or 48 months of permanent address change data.

NCOA^{Link} capabilities are integrated into ACS CASS It!® software, making it easy and convenient for you to meet the move update requirements when you CASS® certify your mailing addresses to quality for postal discounts. However, you do not have to run NCOA^{Link} each time you CASS certify mailings.

To begin using NCOA^{Link} within CASS It, you must first complete and submit the required Move Update Processing Acknowledgement Form (PAF). If you already own CASS It, you can obtain this form by accessing CASS It and clicking on the PAF link under NCOA Information. This form will need to be completed each calendar year, and if you have any questions when completing this form, contact ACS Technologies at (800) 669-2509.

After you have submitted the required Processing Acknowledgement Form, you can upload the addresses to be corrected by clicking **Upload NCOA File** in CASS It. When the addresses have been processed, click **Download NCOA File** to download the changed addresses to your ACS database. You can also print a report of the changes made during NCOA^{Link} processing, and any addresses that were updated during NCOA^{Link} processing will be automatically updated in ACS, so you will not have to manually update your data.

Cost — The fee for obtaining address verification and changes through NCOA^{Link} in CASS It is \$.005 per record. For example, if your database has 1,000 address records, the cost for NCOA^{Link} is \$5.00 each time you processed address changes. If you process address changes every 95 days, this would be an approximate cost of \$20.00 per year for 1,000 records.

Advantages — Addresses updated after running NCOA^{Link} are automatically updated in ACS, saving you valuable time. Using NCOA^{Link} in CASS It will also ensure that your addresses are correct for other aspects of your ministry or organization's goals such as home visits. Since address corrections are made prior to mailings entering the mailstream, you will not need to worry about mailings being returned or forwarding mailings. In addition, if your organization already uses CASS It, there is no equipment to buy.

FASTforward

FASTforward is an automated system that identifies names and addresses that have current change-of-address orders on file with the USPS. It interfaces with addressing automation systems such as multiline optical character reader (MLOCR) or remote video encoding (RVE) technologies, and when incorrect addresses are found, the MLOCR and RVE systems print the new address and its delivery point barcode on the mailing.

Cost — No per mailing cost is associated with **FASTforward**; however, equipment and licensing fees may be involved.

Advantages — Addresses are corrected before entry into the mailstream, which prevents mailings from being forwarded or returned.

Disadvantages — Your organization must use an addressing automation system such as an MLOCR or RVE to print the corrected address on the mailing, and you must also obtain a license and any cost information from the USPS. In addition, you will need to update ACS with any addresses that have changed.

Ancillary Service Endorsements

Ancillary service endorsements are statements printed on the front of mailing to provide the United States Postal Service (USPS) with instructions on handling undeliverable-as-addressed pieces of mail. The treatment and cost of these endorsements differ by class of mail.

Types of ancillary service endorsements that meet the USPS move update requirements include Address Service Requested, Return Service Requested, and Change Service Requested.

Comparison of Ancillary Service Endorsements

The following sections describe each of the ancillary service endorsements that meet the USPS move update requirements.

Address Service Requested

When an Address Service Requested ancillary service endorsement is used, the USPS will forward the mailing to the recipient, and a new address notification will be provided to the sender. If the USPS is unable to forward the mailing after 12 months or if the mailing is undeliverable at any time, it will be returned with the new address or a reason for nondelivery attached.

Cost — For Priority or First-Class Mail, mailings will be forwarded or returned at no charge. For Standard Mail, the USPS will forward the mailing at no charge; however, if all forwarding attempts have been unsuccessful after 13 months, the item will be returned to the sender and a weighted fee will be charged.

Advantages — Both forwarding and return services are provided. If a mailing is forwarded, you will always receive a notification of the new address, which you can update in ACS. Mail is never disposed of by the USPS, and you will receive the original mailing if it cannot be delivered.

Disadvantages — When you receive notification of the changed address, you will need to manually update the address in ACS.

Return Service Requested

When a Return Service Requested ancillary service endorsement is used, the USPS will return any undeliverable mailings to the sender with a new address notification or a reason for nondelivery attached. Forwarding service is not provided.

Cost — For Priority or First-Class Mail, no charge is applied. For Standard Mail, the appropriate singlepiece First-Class or Priority Mail price is charged.

Advantages — You will receive notification of the recipient's new address, which you can update in ACS, or you will receive a reason for nondelivery. Mail is never disposed of by the USPS, and you will receive the original mailing if it cannot be delivered.

Disadvantages — Since forwarding service is not provided, you must forward the mailing to the recipient if it is returned. In addition, when notification of the recipient's new address is received, you will need to manually update the address in ACS.

Change Service Requested

When a Change Service Requested ancillary service endorsement is used, the USPS will provide a new address notification or a reason for nondelivery to the sender but will not return or forward the piece of mail. The piece of mail will be disposed of by the USPS.

Cost — For Priority or First-Class Mail, a charge of \$0.08 is applied for each electronic address notification. For Standard Mail, a charge of \$0.50 is applied for manual notices or a charge of \$0.25 is applied for electronic notices. For automated letters sent Priority or First-Class Mail, the first two notices are provided at no charge, and \$0.06 is charged for each additional notice. For automated letters sent Standard Mail, \$0.03 is charged for the first two notices, and \$0.18 is charged for each additional notice.

Advantages — You will receive notification of the recipient's new address, which you can manually update in ACS, or you will receive a reason for nondelivery.

Disadvantages — Mail is disposed of by the USPS, so you will need to send a new mailing when you receive notification of the recipient's new address. You will also have to manually update the new address in ACS.

Using Ancillary Service Endorsements with ACS

If your church, school, or organization decides to use ancillary service endorsements on your mailings, you may contact ACS Central Services to order single or double window envelopes with your ancillary service endorsement printed on them. The first time you order these envelopes, your order must be placed by calling Central Services at (800) 669-2509 because you will need to obtain a life number for your church, school or organization. Reorders can be placed by phone or by faxing the order, including the life number, to (800) 227-5990. You may also reorder envelopes from the ACS online store at [<https://store.acstechnologies.com/>].

Cass It

Note

Full-Service Intelligent Mail is required for automation discounts. All clients who want to use FullService Intelligent Mail and receive the automation prices must purchase the Max It! module and take a few additional steps. View the Using Full-Service Intelligent Mail help topic for this information, and view more information on the postal requirements from the USPS.

ACS CASS It! provides your church, school, or organization with the tools to CASS™ (Coding Accuracy Support System) certify your mailing addresses and meet United States Postal Service® (USPS) requirements for address verification.

CASS certification ensures that the addresses in your database are valid. This helps your mailing's recipients receive your organization's mailings faster and prevents you from receiving numerous returned mail pieces. In addition, CASS certification qualifies your organization for postal discounts and automation rates. You can also update your CASS certification each time you send a mailing, ensuring that addresses are correct for individuals recently added to your database.

CASS improves the accuracy of carrier route, 5-digit ZIP, ZIP+4, and delivery point codes that display on mail pieces. In order to receive automation rates, addresses must be matched and coded to current USPS directories using CASS certified software. In addition, CASS It features a solution to the USPS Move Update requirement. National Change of Address (NCOA) processing is available within the CASS It module and keeps your addresses up-to-date while meeting USPS requirements for bulk mailings.

Getting Started with CASS It

Before using the CASS It!™ module, you should know the following:

- All ZIP Codes on mail matter must be accurate in order to qualify for discounted postal rates. For Carrier Route Rates, addresses must be matched with CASS™ certified software that supplies enhanced Line of Travel (eLOT™) at least 90 days in advance.
- For automation rate mailings, addresses must be matched using CASS certified software at least 6 months before mailing.
- Carrier route sorting for bulk mail must meet the reformed postal sorting requirements for eLOT. ELOT tells the postal carrier the order in which to deliver the mail. The data required for eLOT is included on the CASS It CD used during the CASS certification process.


To use CASS It, you'll need to:

1. Configure CASS It.
2. Run CASS.
3. View or print invalid addresses.
4. Correct invalid addresses using the Suggestion List.
5. Print Form 3553.

Configuring CASS It

If this is your first time using CASS It!™, you must select your settings before you can CASS™ certify your data. You'll need to CASS certify records for all individuals who will be included in your mailings, so selecting which records to include in your settings is very important.


To configure CASS It

1. Open **CASS It**. On the Windows desktop, click the Start button  in the lower-left corner of the screen. The Start menu displays. Scroll to the ACS Technologies section, and click **CASS It!**.
2. Click **Configure CASS It!**.
3. Under **Records to Include**, select which record types to include in your CASS certification.



Note

All family and individual addresses are included for the selected individuals.

4. To use records from the last search results you received, select **Use Last Search Results**. The date and number of records from your last search displays. Using records the last search results overrides any entries selected under **Records to Include**.
5. Under **File Information**, in the **Select a location to store CASS files for Uploading and Downloading** field, click **Lookup**  to select a directory location.



Note

You'll also need to change this file path if you're running CASS It while using a different ACS login on your computer, or if you're logged into ACS on another person's computer. This is because the file path is unique to each ACS user account.


If you use OnDemand, change the path to point to your user folder on the S: drive.

6. While we recommend that you accept the default file name in the **Define the Upload and Download file name** field, you can enter a new file name. Do not change the extension.
7. Under **Site Information**, enter your site's **Name, Address, City, State**, and **ZIP**.
8. Confirm that all the information in the window is correct and click **OK**.
9. Click **OK**.

Once you've configured CASS It, you are ready to run CASS It and certify your address data.

CASS Certifying Your Addresses


You can perform CASS It!™ to certify your address data according to the United States Postal Service® Regulations.

1. Open **CASS It**. On the Windows desktop, click the Start button  in the lower-left corner of the screen. The Start menu displays. Scroll to the ACS Technologies section, and click **CASS It!**.



Note

If you're running CASS It while using a different ACS login on your computer, or if you're logged into ACS on another person's computer:

First, click **Configure CASS It!**. Under **File Information**, in the **Select a location to store CASS files for Uploading and Downloading** field, click **Lookup**  and set your download file location. This is because the file path is unique to each ACS user account.

If you use OnDemand, change the path to point to your user folder on the S: drive.

2. **OPTIONAL:** In the Cass Certification window, click **Configure Cass It!** to select the address types you want to CASS certify, select a new location for the CASS file to be stored, or define the upload and download file name.
3. Click **Upload CASS File**. After you click **Upload CASS File**, the button is disabled unless you change one of the configuration options or close the program.
4. When the confirmation with the number of records created displays, click **OK**.
5. Once the data finishes uploading, click **Download CASS File**.
6. Select the CASS results file you want to download. The default filename appears as your site #_user name_date_time. Otherwise, the filename appears as the name you defined in the CASS It Online Setup window followed by _date_time.
7. To remove the file name from the list after the download, select **Remove File From List After Downloading**.
8. Click **OK**.

When the download is complete, you can view or print the Form 3553 and the Invalid Address Listing. You can also use the Suggestion List to fix and test addresses.

Matching Addresses Exactly to the USPS Address Database

CASS It!™ now streamlines your mailing addresses and creates an identical match to United States Postal Service® (USPS) recommendations.

When you CASS™ certify an address with information in Address Line 1 and Address Line 2, the information on Address Line 2 is checked first. If a two-line address does not exist in the USPS Address Database, a loss of data can result when both lines contain information that is correct, but that does not identically match that of the USPS. Although the USPS does not currently require that addresses exactly match their database, it may be a requirement in the future.

If you select this option, you can print the Listing of Address Changes Report in ACS People to see how your addresses have changed.

Printing USPS Form 3553

After CASS certifying your addresses, you'll want to print Form 3553 for your internal records.

In addition, the Post Office may require this CASS™ certification form when submitting automation (barcoded) or carrier route mailings. Form 3553 shows how many address matches were attempted, how many were matched, when the matching was done, and the date of the file that was used.

1. After you download your file from the CASS server, click **USPS Form 3553**.
2. Click **Print**.


Printing the Listing of Address Changes Report

If you select **Match Addresses Exactly to USPS address database** before CASS™ certifying your addresses, you may want to print the Listing of Address Changes report after CASS certifying so that you can see what, if any, address information has changed in your People records.

To print this report, you must log into ACS People Suite.

 **Note**

The Listing of Address Changes report lists the addresses in order from most recent to oldest for each individual.

1. Open ACS People Suite.
2. Under **Searches and Reports**, click the **Reports** tab.
3. In the drop-down list, select **People Reports** or **Staff/Organizations Reports** and click **Go** .
4. Expand **Lists** and select **Listing of Address Changes**.
5. Click **Customize**.
6. On the **Report Options** tab, select the necessary options for the report.
7. To view the report, click **Preview**
8. To print the report, click **Print Report** .

Correcting and Testing Invalid Addresses

After you print the invalid addresses report, review the error code listed with each individual's address. This error code gives a brief explanation to help you quickly determine the cause of an invalid address. For example, no primary name ranked. You can use the **Suggestion List** option to correct invalid addresses.

1. In the CASS™ Certification window, click **Suggestion List**.
2. Under **Selection**, choose one of the following:
 - People
 - Special Mailings
 - Organizations
3. In the **Name** list, select a name and click **Test Address**. One of the following messages displays:
 - The address is invalid, update the address information.
 - The address was successfully certified. Please click **Replace Address** to save this certified address.
4. A list of addresses displays. Under **Address**, enter the address that is correct for the selected individual.
5. Click **Test Address**. Do one of the following:
 - If the address is valid, the Address Valid dialog box appears. Click **OK**.
 - If the address is invalid, update the address and click **Test Address**.
6. If the address is successfully certified, click **Replace Address**.
7. Click **Yes**. The selected individual's name is automatically removed from the **Name** list.
8. Click **Close**.
9. Repeat steps 3 through 8 until all addresses are valid.

The USPS website also contains an excellent resource to help you locate and fix address problems

About Enhanced Line of Travel

Enhanced Line of Travel (eLOT™) is a redesign of the existing United States Postal Service® Line of Travel (LOT) product. eLOT more closely resembles the actual delivery sequence by the postal carrier.

The original LOT narrowed down the mail carrier's delivery route to the block face level (ZIP+4) by discerning whether an address resided on the odd or even side of a street or thoroughfare. eLOT narrows the mail carrier's delivery route walk sequence to the house (delivery point) level. This allows you to sort your mailings to a more precise level.

LOT codes are used to prepare carrier-route mailings for Periodical and Standard Mail. The LOT codes are enhanced by the United States Postal Service, sometimes showing as many as four LOT codes per block face. eLOT data is updated when you CASS certify addresses, and you can view this data in the Add/Edit Addresses window in ACS People Suite.

Using National Change of Address (NCOA)

Getting Started with NCOA- Forms

Before using National Change of Address, you must first complete the NCOA^{link™} Processing Acknowledgement Form (PAF). In addition, you'll need to complete the Move Update Account Activation Notification form and fax or mail it to Satori Software.

The PAF's expiration date displays under **NCOA Information** in the CASS Certification window, and a new PAF must be completed each year. However, your Move Update Account Activation Notification does not expire.


You can view both forms by clicking on the **PAF** link under **NCOA Information** in the CASS Certification window or by clicking here.



After you have completed the required forms, you're ready to configure NCOA and select which addresses to include in processing.

Configuring NCOA

Before you NCOA^{link™} process your addresses, you must define which addresses you want processed. You can process addresses from the modules in ACS People Suite or from your latest search results, but be sure to process all of the addresses you want to include in your bulk mailings.

1. Open **CASS It**. On the Windows desktop, click the Start button  in the lower-left corner of the screen. The Start menu displays. Scroll to the ACS Technologies section, and click **CASS It!**.
2. Click **Configure NCOA**.
3. Under **Records to Include**, select which record types you want to include. If you select **People**, Member, Prospect, and Other records are included.



Note

All family and individual addresses are included for the selected individuals.

4. If you want to use records from the last search results you received, select **Use Last Search Results**.
5. Click **OK**.

Once you've configured NCOA, it's time to process addresses with NCOA.

Processing Addresses with NCOALink™

After configuring National Change of Address (NCOALink™), it is time to run NCOA. Running NCOA consists of uploading your addresses, having them processed, and downloading the results.

1. In the CASS Certification window, under **NCOA Information**, click **Upload NCOA File**.



Note

After clicking **Upload NCOA File**, the button is disabled unless you change one of the configuration options or close the program.

2. After uploading the file, a confirmation displays, listing the number of address records to be processed and the total cost. Click **Yes** to continue.
3. Click **Download NCOA File**.

After processing addresses with NCOA, you can print the NCOA report to show your Post Office that you're in compliance with the USPS Move Update.

Printing the NCOA Address Report

The NCOA Address Report displays address changes that occurred in your last NCOALink™ process. The report displays the individual or organization's name, new address, removed address, module, and move effective date.

The NCOA Address Report only displays records that changed due to the returned NCOA files. To view a report that displays addresses changed manually in ACS People Suite, print the Listing of Address Changes report in ACS People Suite.

1. Run NCOA to process your addresses.
2. In the CASS Certification window, click **NCOA Address Report**.
3. To print the report, click **Print**.

Printing the NCOA Processing Summary Report

The NCOALink™ Processing Summary Report is an optional report that you can print to view the results of the NCOA processing. You can show this report to your local United States Postal Service®, USPS, for an explanation of how you have implemented their Move Update Standard requirement.

1. Run NCOA to process your addresses.
2. In the CASS Certification window, click **Print NCOA Report**.
3. If you want to print the report, click **Print**.

Geocoding


Geocoding is an optional service you can purchase to generate the latitude and longitude for each valid address when you CASS™ certify your data. Longitude and Latitude values display as a part of the person's

address record. When the CASS certification results are applied to the data, these fields are also updated in the address record.

This service can be helpful depending on the needs of your congregation, organization, or school. When using geocoding, you can determine which regions of your town, city, or county are drawing new members, and this can help you decide where to plant future ministries.

If you select to use this service, the downloaded coordinates can be viewed in the Add/Edit Addresses window accessed from the View/Edit Individual - **Addresses** tab and View/Edit Organization - **Addresses** tab in ACS. Even if you do not subscribe to the Geocoding service, you can enter the coordinates manually in the **Latitude** and **Longitude** fields in the Add/Edit Addresses window.

Regardless of whether you subscribe to Geocoding or enter coordinates manually, you can use an Advanced Export to extract the data into an Excel® spreadsheet, and then import it into mapping programs such as Microsoft's® Streets & Trips.

1. Log into the ACS People Suite.
2. Under Manage Records, click the **People** or **Organizations** tab.
3. In the drop-down list, select **View/Edit Individual** or **View/Edit Organizations** and click **Go** .
4. Select an individual or organization and click **View/Edit**.
5. Click the **Addresses** tab.
6. Select an address, and click **Edit**.
7. The **Latitude** and **Longitude** fields are located below the **Map Page** field. Click in the fields and make any changes needed.

Exporting Latitude and Longitude Coordinates in ACS

You can use the Advanced Export to extract latitude and longitude coordinates from ACS.

1. In the ACS People Suite, click **Searches**.
2. On the **Search Information** tab, click **Advanced Export**.
3. On the Advanced Export Menu, click **Create New Export**.
4. On **Select Export Type**, select one of the following:
 - **File Export** - Select to create a single file containing selected export information.
 - **Database Export** - Select to create multiple files that are linked by common fields.



If you are unsure of which type of export you want to perform select **File Export**.

5. Click **OK**. The ACS Data Export Designer displays.
6. Enter a title for the export in the **Export Title** field.
7. **Optional:** Click **Description** to enter a detailed description of the export and click **OK**.
8. On the **Groups** tab, select People and the appropriate options under **Record Selection**, or select **Search Results** to export information based on your last search results.
9. On the **Fields** tab, expand **Personal** and **Name**.
10. Select the name format you want to include in the export and double-click it to add it to the list of selected fields.
11. Expand **Address** and double-click on **Latitude** and **Longitude** to add them to the list of selected fields.
12. **OPTIONAL:** If you want to add any additional fields to your export, expand the appropriate section and double-click on those fields to add them.

13. On the **Format** tab, select the appropriate format in the File Format drop-down list. For example, if you wanted to create a Microsoft Excel® spreadsheet, you would select **Microsoft Excel (.xls)**.
14. Click **Run Export**, then **OK**.

Entering Addresses Based on USPS Recommendations

You can enter new addresses into People based on United States Postal Service® (USPS) recommendations. Using the USPS recommendations can also prevent data in your addresses, such as school or nursing home names, from being removed when you CASS™ certify your addresses.

Although the USPS does not currently require addresses to be formatted based on their recommendations, USPS requirements frequently change, and entering your addresses based on USPS recommendations now may save you a great deal of time if this occurs.

If you have members who have both a street address and a P.O. Box, enter each of these addresses as a separate address.

USPS Addressing Recommendations

Many branches of the United States Postal Service® (USPS) use automated mail processing machines to read the addresses on mail pieces. These machines read from the bottom up and look first for a city, state, and ZIP Code. Then, the machines look for a delivery address. Technically, a name, a delivery address, and a city, state and ZIP code are the only pieces of information necessary to categorize a mail piece as deliverable.

The following format is the USPS recommended format for addressing mail:

Name or attention line:	JAMES AARON
Company:	FIRST BAPTIST CHURCH
Suite or apartment number:	STE 2006
Delivery address:	1960 W CHELSEA AVE STE 2006
City, State, ZIP Code:	ALLENTOWN PA 18104

Notice that the suite number is repeated in the delivery address. In the above address, neither the company line nor the suite or apartment number line are necessary for delivery.


Most valid addresses will include the Name or attention line, Delivery address line, and City, State, ZIP Code line. While ACS provides two address lines in the People records, most addresses only need one line for delivery. To ensure that the entire delivery address fits on one line, use approved abbreviations in your address.

For more information on USPS addressing recommendations and requirements, please visit the USPS website at www.usps.com.


Entering a Simple Street Address

You can enter new addresses into People based on United States Postal Service® (USPS) recommendations.

1. In the **Address 1** field, enter the street address.
2. Leave the **Address 2** field blank.
3. Enter the **ZIP Code**, **City**, and **State** in the appropriate fields.

 **Tip**

To select a previously entered **ZIP Code** and automatically insert the **City** and **State** fields, click **Lookup**



4. Click **OK**.

Entering an Address With a School, Company, or Nursing Home Name

You can enter new addresses into People based on United States Postal Service® (USPS) recommendations.

Note

If a school, company, or nursing home name is entered into the **Address 1** or **Address 2** fields, it could be cleared when you CASS™ (Coding Accuracy Support System) certify your addresses. When an address contains a school, company, or nursing home name, always enter the name in the **Company** field to avoid losing this information.

1. In the **Company** field, enter the school, company, or nursing home name.
2. In the **Address 1** field, enter the full street address, including the box number, suite number, or room number.
3. Leave the **Address 2** field blank.
4. Enter the **ZIP Code**, **City**, and **State** in the appropriate fields.

Tip

To select a previously entered **ZIP Code** and automatically insert the **City** and **State** fields, click **Lookup**

5. Click **OK**.

Entering an Address That Includes an Apartment, Suite, or Room Number

You can enter new addresses that include apartment, suite, or room numbers into People based on United States Postal Service® (USPS) recommendations.

The screenshot shows a software dialog box titled "Add / Edit Addresses" with a "Family Address" section. The form contains the following fields and options:

- Address Type: dropdown menu
- Company: text input field
- Address 1: text input field containing "303 Ives Rd. Apt. C"
- Address 2: text input field
- ZIP Code: text input field containing "29506" with a help icon
- Line of Travel: text input field
- City: text input field containing "Florence"
- State: text input field containing "SC"
- Carrier Code: text input field
- Phone: text input field with radio buttons for "Listed" (selected) and "Unlisted"
- Preferred Phone: checkbox
- Text Message Allowed: checkbox
- Geographic Zone: dropdown menu
- Sub Zone: dropdown menu
- Map Page: text input field
- MapX: text input field
- MapY: text input field
- Latitude: text input field
- Longitude: text input field
- Country: text input field containing "USA"

Buttons for "OK" and "Cancel" are located at the bottom right of the dialog.

Note

If a school, company, or nursing home name is entered into the **Address 1** or **Address 2** fields, it could be cleared when you CASS™ (Coding Accuracy Support System) certify your addresses. When an address contains a school, company, or nursing home name, always enter the name in the **Company** field to avoid losing this information.

1. In the **Company** field, enter the school, company, or nursing home name.
2. In the **Address 1** field, enter the full street address, including the box number, suite number, or room number.
3. Leave the **Address 2** field blank.
4. Enter the **ZIP Code**, **City**, and **State** in the appropriate fields.
5. Click **OK**.

When Cass It! Changes Valid Addresses

The USPS National Customer Support Center maintains a national database of valid addresses that is used to CASS™ certify addresses. This database contains a list of all known valid addresses in the United States; however, there may be discrepancies with new or remote addresses.

If you have a valid address in your database that is changed to an incorrect address each time you run CASS It!™, the address may not be listed in the national database as a valid address. You can visit the USPS website at www.usps.gov to confirm that the address is not in the national database. When you encounter this problem, report the discrepancy to the USPS National Customer Support Center at 1-800238-3150. Once the entry is corrected in the national database, we can correct it in our program.

Visit the USPS website at www.usps.gov to confirm that the address is not in the national database.

Max It

Note

Effective **January 26th, 2014**, Full-Service Intelligent Mail will be required for automation discounts. All clients who want to use Full-Service Intelligent Mail and receive the automation prices must purchase the Max It! module and take a few additional steps. View the Using Full-Service Intelligent Mail help topic for this information, and view more information on the postal requirements from the USPS.

ACS Max It!® is a bulk mailing tool that works in conjunction with the ACS Cass It!™ and ACS People and Organizations modules. After you CASS™ (Coding Accuracy Support System) certify your mailing with ACS CASS It, Max It presorts your mailing addresses to meet United States Postal Service® (USPS) requirements for bulk mail discounts and sorts your mailing so that you receive the highest discount possible.

With Max It, you can design and print address labels for your mailing, or you can print addresses directly on your mail piece or its envelope. In addition, Max It calculates, completes, and prints all required postal documentation, so that you can spend your valuable time working toward your organization's goals rather than filling out complicated forms.

Max It includes additional features to serve your bulk mailing needs, including:

- Printing addresses directly on your mail piece or envelope. If you want to print your addresses directly on the envelopes, periodical, or package you're mailing, you can easily do this in Max It.
- Excluding remaining records from any mailing sort. If you only want to send mailings to addresses that are eligible for Automation discounts, the records that meet those requirements will be sorted, and any remaining records can be sorted as Nonqualified or excluded. Previewing your tray or sack labels with your bulk mail reports.
- Forcing ZIP® Codes as in-county for periodical mailings. If your address list has a ZIP Code that crosses county lines, and you want those pieces to receive an in-county discount, simply enter these ZIP Codes when selecting mail sort discounts, and they will get the benefit of the in-county rate.
- Printing Intelligent Mail barcodes on your address labels.
- Saving your mailing reports as PDF (Portable Document Format) files. This allows you to e-mail your files or save them in a special folder on your computer or network.

Before Using Max It


Before using Max It to sort your mail for bulk mailing discounts, you need to take several important steps.

If this is your organization's first bulk mailing, ACS Technologies recommends that you hold an internal meeting within your organization to make decisions about your bulk mailing. Some items you may want to discuss include:

- Your mailing's sort class (First-Class Mail, Periodical, Standard Mail, or Package Services.)
- Your mailing's piece type (Machinable letters, flats, or postcards; or nonmachinable letters or flats). Each piece type has specific dimensions, so if you have any questions regarding piece type, contact your Post Office™.
- Your mailing's sort level (Carrier Route, Automation, Nonautomation, Single Piece).
- Formatting your address labels. Max It allows you to print your addresses on labels or directly on envelopes. For more information about printing address labels, see [Printing Address Labels](#). For more information about printing addresses on envelopes or directly on your mail piece, see [Printing Addresses Directly on Envelopes or Mail Pieces](#).
- Applying for a USPS Bulk Mailing Permit, if you do not already have one. This permit is required to send bulk mailings, and you will need to enter information from the permit when using Max It.


Setting up a Max It Mailing in People

The first step when creating a Max It!® mailing in ACS People is setting up address labels and related options on the **Report Options** tab.

1. Under Searches and Reports, click the **Labels** tab.
2. In the drop-down list, select **People** and click **Go** .
3. On the sidebar, select **Create a New Max It! Mailing**, then click **Customize**.
4. On the **Report Options** tab, enter a name for your Max It mailing in the **Title** field. When you name the mailing, it saves the settings that you enter so that you do not have to reenter them each time you create a bulk mailing.
5. Under **Record Selection**, select how many labels to print for each eligible name.
6. Under **Label Options**, select a group of individuals to include in the mailing.
7. Under **Label Name**, select to print the individual's Formal or Informal name.
8. Under **Salutation**, select to print the individual's Formal or Informal salutation.
9. Under **Address Options**, select the address to print on the mailing label in the Address Type dropdown list.
10. Under **Attendance Options**, select the attendance master group in the Master Group drop-down list. You only need to make a selection if you selected one or more attendance fields under Special Fields in the Label Options section.
11. Click **Preview**.

Setting up a Max It Mailing in Organizations

The first step when creating a Max It!® mailing for your organizations is setting up address labels for the mailing's recipients. You can select various options for your labels on the Setup tab.

1. Under Searches and Reports, click the **Labels** tab.
2. In the drop-down list, select **Staff/Organizations** and click **Go** .
3. On the sidebar, select **Create a New Max It Mailing**, then click **Customize**.

4. On the **Report Options** tab, enter a name for your mailing in the **Title** field. This saves the settings that you enter, so that you do not have to reenter them each time you send bulk mail.
5. Under **Record Selection**, select the appropriate option.
6. Under **Organization Options**, in the Level drop-down list, select the organization's level.
7. In the **Label Name** drop-down list, select the name that you want to display on the label.
8. **OPTIONAL:** If you want to add any special fields from ACS to your address label or mailing layout, select **Special Fields** and click **Select** to add those fields. For more information, see "Working with Database Fields".
9. In the **Address Options** drop-down list, select the type of address (mailing, statement, etc) to print on the label
10. Under **Individual Options**, in the **Label Name** drop-down list, select the name to print on the labels.
11. **OPTIONAL:** To print labels for the organization's staff as of the current date, select **Use System Date under Staff Options**. Next, select **Select Staff Positions** and click **Select** to add the staff members to include in the mailing.
12. To create a mailing for an organization even if the none of the selected staff members exist in that organization, select **Include Label if no Position Exists**.
13. To print labels only for the organizations that were included in the last search results, select **Use Last Search Results**. If you want to print labels for the organizations and the individuals that displayed in the last search results, select **Include Individuals**.
14. Click **Preview**.

Printing Prior Max It Settings

On the Max It Setup tab in People or Organizations, you can print a report that shows your Max It settings. This report is helpful when entering your settings and selecting your options in the PRESORT Agent Wizard , Label Designer Wizard, and Label Designer.

1. Under Searches and Reports, click the **Labels** tab.
2. In the drop-down list, select **People** or **Staff/Organizations** and click **Go** .
3. On the sidebar, select Create a New Max It Mailing, then click **Customize**.
4. On the **Report Options** tab, click **Prior Max It! Settings**.
5. In the Select Report window, under **Saved Settings**, select the report that you previously used for your Max It! mailings.
6. Click **Print**. The Prior Max It Settings report displays. To print the report, click **Print**.
7. Refer to the report as needed in the PRESORT Agent Wizard and Label Designer Wizard.

The PRESORT Agent Wizard

After you set up your mailing labels in ACS and clicked **Create Mailing**, the PRESORT Agent Wizard displays. Use the PRESORT Agent Wizard to select a mailing template, a presort class and type of mailpiece, and the discounts for which you qualify. In addition, enter the dimensions of your mail piece and mailing permit information, and define your mailing's sorting options and label stock.

As you proceed through the wizard, click **Next** to go to the next window, or click **Previous** at any time to return to the previous window. To navigate between fields, click in the fields or press TAB on your keyboard. Pressing ENTER on the keyboard will take you to the next window in the Wizard.

If your organization sends many bulk mailings, you may also find it helpful to create templates for your mailings. Templates store your settings for future use, saving you valuable time when creating bulk mailings.

The information that you enter and settings that you define in the PRESORT Agent Wizard allow Max It to complete the required USPS forms for bulk mailing and determine the best discounts for your organization's mailings, maximizing your bulk mail savings.


When you have completed the PRESORT Agent Wizard, you will have successfully:

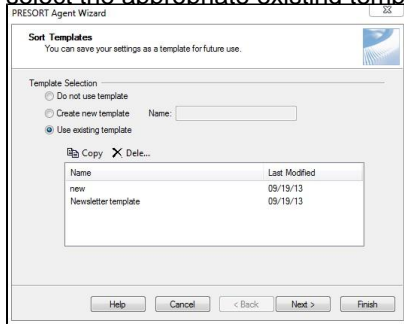
- Selected the appropriate mail class and piece type.
- Entered your mail piece's dimensions, thickness, and weight.
- Selected your sort levels and defined any advanced options with your mailing's containers.
- Specified your mailing's Intelligent Mail settings, if applicable.
- Entered mailing and permit information.
- Selected your mail drop post office and any eligibility discounts for which you qualify.
- Entered publication information, such as your publisher's contact information and your edition and issue number, if your mailing is a publication.
- Selected your tray and sack label layout.
- Reviewed your sort information in the Progress window.
- Saved the Mail.dat files to upload to PostalOne!, and printed the postal reports for your records from the Progress window.
- Selected your label or envelope layout, or created a new layout template in the Progress window.

Selecting Sort Templates in the PRESORT Agent Wizard

After setting up your Max It mailing in ACS, the next step is selecting a template in the PRESORT Agent Wizard. A template allows you to save the settings for a mailing and can be useful when sending multiple bulk mailings that have the same sort class, piece type, mailing dimensions, and sorting preparation. You can create a new template, use an existing template if one has been created, or choose settings for the presort without saving them as a template.

You can also create a new template by copying an existing one. This is useful if the bulk mailing you are creating has many, but not all, of the same settings as a previous bulk mailing. Copying the template modifies your presort settings for the current mailing without overwriting previous settings. In addition, if there is a template that you no longer use, you can delete the template.

1. Under Searches and Reports, click the **Labels** tab.
2. In the drop-down list, select **People** or **Staff/Organizations** and click **Go** .
3. On the sidebar, select **Create a New Max It Mailing**, then click **Customize**.
4. On the **Report Options** tab, set up your mailing address labels and click **Preview**.
5. The PRESORT Agent Wizard displays. Under **Template Selection**, select the appropriate option.
 - To choose settings for your mailing without saving them as a template, select **Do not use template**
 - To create a new template and save your settings in the PRESORT Agent Wizard, select **Create new template**. Next, enter a name for the template in the **Name** field.
 - To use a template that you have created for a previous mailing, select **Use existing template**. Then, select the appropriate existing template from the grid.



6. Click **Next**.

Caution

Clicking **Finish** after selecting a sort template in the PRESORT Agent Wizard is not recommended. Even though your mailing may have the same settings as a previous mailing, you will need to enter the date you will drop the mailing off when entering mailing information later in the PRESORT Agent Wizard. Clicking **Finish** after this step will not allow you to change the date, and the incorrect date prints on your postal reports.

Selecting Sort Class and Piece Type

After selecting a template in the PRESORT Agent Wizard, the next step is selecting the mail class and piece type.


The mail class and piece type that you select will affect your bulk mailing's discount, so be sure to select the correct class and type for the mailing that you are sending. The type of piece you select depends on the piece dimensions and characteristics, and for some classes of mail, you must specify the machinability of the piece.

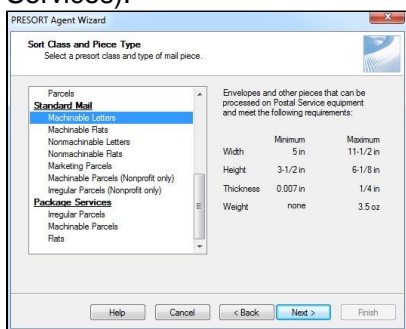
The following mail classes are available in Max It:

- **First-Class Mail®** — Includes all matter wholly or partly in writing or typewriting, personal correspondence, bills and statements, and all matter sealed against inspection. Anything under 13 ounces can be sent First-Class Mail.
- **Periodicals** — Includes newspapers, magazines and other periodical publications whose primary purpose is transmitting information to an established list of subscribers or requesters. Periodicals must be published at regular intervals and consist of printed material.
- **Standard Mail®** — Includes advertising mail, catalogs and newsletters of a non-personal nature that are not required to be mailed as First-Class Mail. Standard Mail must weigh less than 16 ounces and requires a minimum volume of 200 pieces or 50 pounds.

- **Package Services** — Includes larger and heavier items. There are several subcategories of Package Services with specific content, weight, and dimension limitations.

For specific piece type and machinability definitions and requirements, consult with the USPS or see the USPS Domestic Mail Manual at USPS.com®.

1. Under Searches and Reports, click the **Labels** tab.
2. In the drop-down list, select **People** or **Staff/Organizations**. Click **Go** .
3. On the sidebar, select **Create a New Max It Mailing**, then click **Customize**.
4. On the **Report Options** tab, set up your mailing address labels and click **Create Mailing**.
5. When the PRESORT Agent Wizard displays, select the appropriate template and click **Next**.
6. In the list, select the appropriate **Mail Class** (First-Class Mail, Periodicals, Standard Mail, or Package Services).



7. Below the **Mail Class**, select the appropriate **Piece Type**. When you click on a piece type, information about that piece type and its dimensions, thickness, and weight will display (however, you can define the mail piece's dimensions in the next window). The piece types vary with each mail class.
8. Click **Next**.

Entering Mail Piece Dimensions, Thickness, and Weight

After you have selected the mailing's address settings, template, sort class, and piece type, the next step in the PRESORT Agent Wizard is to enter the mail piece's dimensions, which include the mail piece's height, width, thickness, and weight.



Tip

An easy way to determine a mail piece's thickness and weight is to measure or weigh 10 pieces. You can enter the thickness and weight in the appropriate fields and enter the number of pieces you weighed or measured in the based on field.

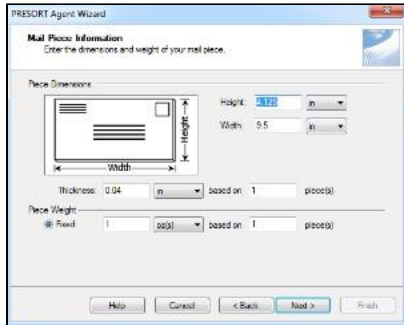
1. Under Searches and Reports, click the **Labels** tab.



In the drop-down list, select **People** or **Staff/Organizations** and click **Go**

2.

3. On the sidebar, select **Create a New Max It Mailing**, then click **Customize**.
4. On the **Report Options** tab, set up your mailing address labels and click **Preview**.
5. When the PRESORT Agent Wizard displays, select the appropriate template and click **Next**.
6. Select the mailing's sort class and piece type and click **Next**.




7. Measure your mail piece's height and width, and enter these numbers in the **Height** and **Width** fields. Be sure to select the appropriate unit of measurement in the drop-down lists.
8. Determine your mail piece's thickness and enter the number in the **Thickness** field. Be sure to select the appropriate unit of measurement in the drop-down list and enter the number of pieces you measured in the **based on** field.
9. Weigh your mailing and enter the weight in the **Piece Weight Fixed** field. Be sure to select the appropriate unit of measurement in the drop-down list and enter the number of pieces you weighed in the **based on** field.
10. Click **Next**.

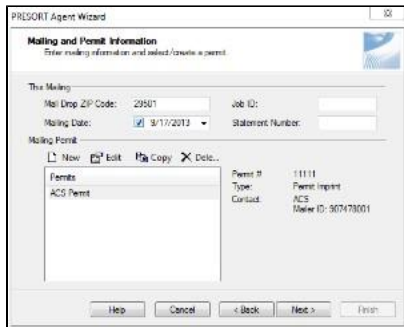
Note

If the dimensions entered do not meet the requirements for the specified sort class and piece type, a message displays when you click **Next**. If your mail piece's dimensions and measurements do not meet the sort class and piece type requirements, ACS Technologies recommends that you contact the USPS to determine the best sort class and piece type for your mailing, as mailings that do not meet USPS requirements could be rejected by the Post Office.

Entering Mailing Information

Use the Mailing and Permit Information window to enter information about your mailing, such as the ZIP Code where it will be dropped off for mailing, the date it will be mailed, a job ID, and the appropriate mailing permit information.

1. Under Searches and Reports, click the **Labels** tab.
2. In the drop-down list, select **People** or **Staff/Organizations**. Click **Go** .
3. On the sidebar, select **Create a New Max It Mailing**, then click **Customize**.
4. On the **Report Options** tab, set up your mailing address labels and click **Preview**.
5. When the PRESORT Agent Wizard displays, proceed through the wizard, selecting the appropriate template, sort class and piece type, and mail piece dimensions.
6. Under **This Mailing**, in the **Mail Drop ZIP Code** field, enter the ZIP Code of the Postal Service Facility from which the mailing will be sent.



7. In the **Mailing Date** drop-down list, select the date the mailing will be dropped off at the Postal Service facility.
8. OPTIONAL: In the **Job ID** field, enter a number to help identify a particular mailing for your organization. Using a Job ID could be helpful if your organization sends multiple mass mailings per day.
9. In the **Sequence Number** field, a sequence number displays. A unique number is generated for each mailing and prints on reports to correctly identify the paperwork for the mailing.
10. Under **Permit Holder**, select the appropriate mailing permit.
11. Click **Next**.

Entering Mailing Permit Information

⚠ Caution

If you are unsure about any information needed for the mailing permit section, contact the Post Office that issued your mailing permit. The Mailer ID field must be completed. If you do not know your Mailer ID or need to request one, contact the Post Office.

In order to send bulk mailings using permit imprint, metered mail, precanceled stamps, or a precanceled postmark, you must have a special mailing permit.

A mailing permit gives you permission to use certain postage payment methods for bulk and discounted mailings. There is no fee to apply for a permit to send mailings with precanceled stamps or a postage meter, but you must hold a permit and pay an annual mailing fee at any Post Office where you want to submit and pay for your mail.


The USPS also offers the option of a permit imprint. A permit imprint is a way of paying postage on bulk mailings without using precanceled stamps or a postage meter. When using a permit imprint, the mailer prints postage information in the upper right corner of the mail piece. When you take your mailing to the Post Office, the total cost of postage is deducted from your permit imprint account. A fee is due when applying for a permit imprint, and if you hold a permit imprint account, you must send a bulk mailing at least once every two years to keep your account active.

Applying for a permit or permit imprint is different from applying for nonprofit mailing status. If you're just beginning with bulk mail, the first step is to decide how you want to pay for postage, then apply for your permit or permit imprint, depending on your decision. After you have your permit or permit imprint, apply for nonprofit mailing privileges.

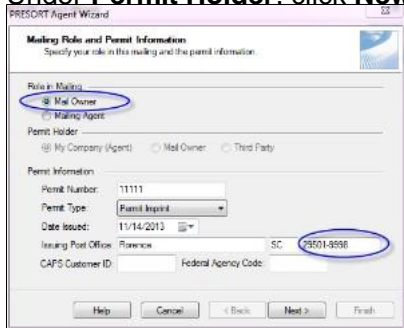
Refer to your Quick Service Guide, other postal publications, or the USPS website <http://www.usps.gov> for more information about applying for permits, permit imprints, or nonprofit status.

You will need to select the appropriate permit information when you use Max It to send a bulk mailing. On the Mailing and Permit Information window, you can add permit information to be saved for each mailing, edit permit information if anything changes on your permit, copy a permit to modify your permit settings without overwriting the original permit settings, or delete a permit that is no longer in use.

If you printed out the Prior Max It Settings Report, your permit information will be listed on that report, and you can simply enter this information into the appropriate fields.

1. Under Searches and Reports, click the **Labels** tab.
2. In the drop-down list, select **People** or **Staff/Organizations**. Click **Go** .
3. On the sidebar, select **Create a New Max It Mailing**, then click **Customize**.
4. On the **Report Options** tab, set up your mailing address labels and click **Preview**.
5. When the PRESORT Agent Wizard displays, proceed through the wizard, selecting the appropriate template, sort class and piece type, mail piece dimensions, sort levels and advanced options. Click **Next**.
6. In the fields under This Mailing, enter the appropriate **Mailing Information**.
7. Under **Permit Holder**, select your mailing permit from the grid and click **Next**.

1. On the sidebar, select **Create a New Max It Mailing**, then click **Customize**.
2. On the **Report Options** tab, set up your mailing's address labels and click **Preview**.
3. When the PRESORT Agent Wizard displays, proceed through the wizard, selecting the appropriate template, sort class and piece type, dimensions, sort levels, advanced options, and mailing information.
4. Under **Permit Holder**, click **New**.



5. Under **Role in Mailing**, select **Mail Owner** if you are sorting and sending the mailing with your own permit, or **Mailing Agent** if you are sorting and sending the mailing on behalf of another organization. If you select **Mailing Agent**, be sure to select the appropriate option under **Permit Holder** as well. Note: If you change the role, you will have to re-enter your address and contact information on the next window.
6. Under **Permit Information**, enter the appropriate information and click **Next**.



Note


You will need to enter the Zip Code as a Zip+4.

7. Under **Mailing Information**, enter the appropriate **Permit Information**, **Customer Registration ID**, **Nonprofit Authorization number**, and **Mailer ID**.

8. Click **Finish**.

Entering Publication Mailing Information

If your mailing is a publication, specify information unique to periodical sorts in the Publication Information window. The information that you enter is used to complete PS Form 3541. This window does not display if your mailing is not a periodical.

1. Under Searches and Reports, click the **Labels** tab.
2. In the drop-down list, select **People** or **Staff/Organizations**. Click **Go** .
3. On the sidebar, select **Create a New Max It Mailing**, then click **Customize**.
4. On the **Report Options** tab, set up your mailing's address labels and click **Preview**.
5. When the PRESORT Agent Wizard displays, select the appropriate template, sort class, piece type, and mail piece dimensions.
6. Enter your mailing and permit information, and click **Next**.

Under **Publication Information**, enter your **Publication Title**, **Publication Number**, **Volume**, and **Issue/Edition**.

7. Select the **Issue Date** and **Issue Frequency** in the drop-down lists.
8. Enter the post office where you will submit your mailing in the **Entry Post Office** field.
9. Enter your state's abbreviation and ZIP+4 in the **State & ZIP+4** field.
10. Enter your publisher contact's name and phone number in the **Publisher Contact** and **Phone** fields.
11. In the **Advertising %** and **Non-Advertising %** fields, enter the percentage of advertising and nonadvertising your publication contains. If your publication does not contain advertising enter 0% in the **Advertising** field and 100% in the **Non-Advertising** field.
12. If your publication has a Ride-Along attached or enclosed, enter your the ride-along's weight in the **Ride-Along Weight** field. Be sure to select the number of pieces this weight is based on in the **Based On Pieces** field.
13. Under **Options**, select **Print all pages of PS Form 3541**, **Annual non-subscriber threshold exceeded**, **Create firm bundles**, or **Exceptional Dispatch** if any of these options apply to your mailing, then click **Next**.

Defining Sort Levels and Advanced Options

After you enter the mail piece's dimensions, thickness, and weight, it is time to select your mail piece's sort levels and define your mailing's advanced options. Sorting your mail groups the mail pieces by ZIP Code™, and all of the pieces going to the same area are grouped into the same bundle or tray. Mailings are first sorted into specific areas, such as a particular ZIP Code, and then more general areas. Leftover mail pieces are put together.


The Sort Levels available in the First sort level, Second sort level, and Third sort level drop-down lists are determined by the Sort Class and Piece Type selected earlier in the PRESORT Agent Wizard. The sort levels in the PRESORT Agent Wizard are tier-based, and if a piece does not qualify for one level of sorting, it is automatically demoted to a level with more lenient requirements. This process ensures the highest level of savings and that the largest possible number of pieces will be included in the mailing.

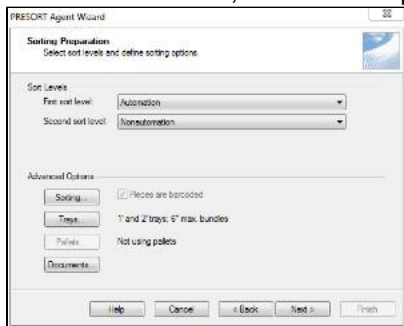
Sort levels in the PRESORT Agent Wizard include:

- **Carrier Route (Simplified Addressing)** — Carrier Route (Simplified Addressing) sorts mail for sending identical mail pieces to every customer on a postal route or to all Post Office boxes at a Post Office, which is commonly known as General Delivery. Selecting this option could be useful if you are mailing an advertisement to let a large number of residents in your community know about a function such as a holiday concert.
- **Carrier Route (WS)** — Carrier Route (Walk Sequence) sorts mail in the order that the letter carrier delivers mail for a route.
- **Carrier Route (LOT)** — Carrier Route (Line of Travel) sorts mail by ZIP+4 codes in the order in which the route is served by the mail carrier. The mail pieces are sequenced in the tray or container in the order in which they will be delivered.
- **Automation** — Automation sorts mail that meets specific guidelines for mail piece design, size, and machine readability. Mailings will be sorted by automation when they can be scanned and processed by

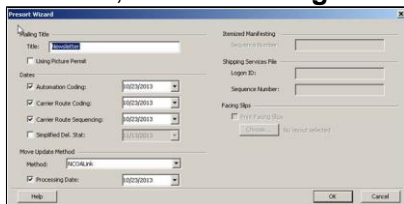
automated equipment at an automated area distribution center (AADC). Selecting this option prints a barcode on your mailing label.

- **Nonautomation** — Nonautomation sorts mail that must be manually processed by the USPS. These mail pieces cannot be scanned and processed by postal service equipment and therefore cost more to mail when compared to automated pieces.
- **Exclude Remaining Records** — When this option is selected in the Second sort level or Third sort level drop-down lists, any mail pieces that cannot be sorted at the first sort level will be excluded from the mailing entirely. Examples of records that would be excluded include any records in ACS that do not contain addresses or contain partial addresses.

1. Under Searches and Reports, click the **Labels** tab.
2. In the drop-down list, select **People** or **Staff/Organizations**. Click **Go** .
3. On the sidebar, select **Create a New Max It Mailing**, then click **Customize**.
4. On the **Report Options** tab, set up your mailing's address labels and click **Preview**.
5. When the PRESORT Agent Wizard displays, proceed through the wizard, selecting the appropriate template, sort class and piece type, dimensions, mailing and permit information, and Mail.dat information. Click **Next**.
6. Under **Sort Levels**, select the **First**, **Second**, **Third** and **Fourth** sort level in the drop-down list. The first sort level is the primary method by which your mail should be sorted. At each level, if a mail piece cannot be sorted, Max It attempts to sort it by the next available method.



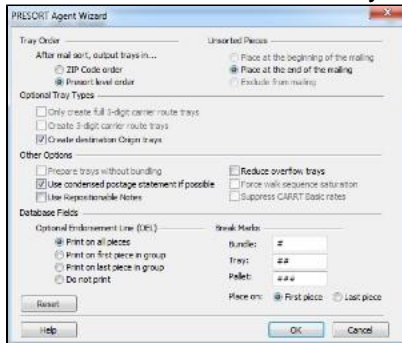
7. To select the advanced sorting options, click **Sorting**. For more information, see Selecting Advanced Sorting Options.
8. To select the advanced tray options for your mailing, click **Trays**. For more information, see Selecting Advanced Tray and Sack Options.
9. Under **Advanced Options**, click **Documents**. Under **Document Settings**, enter a **Title**, for example Newsletter Mailing.
10. Under **Dates**, select the date you last processed Cass It! for **Automation Coding**, **Carrier Route Coding**, and **Carrier Route Sequencing**.
11. Under **Move Update Method**, select your method and select the **Processing Date**. If you select NCOALink, the **Processing Date** will be the date you last processed NCOA. If you select any other method, the **Processing Date** will be the current date.



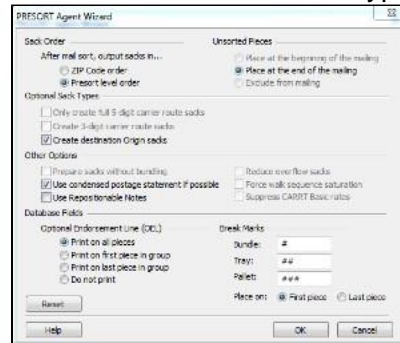
12. Click **OK**.
13. Click **Next**.

Selecting Advanced Sorting Options for Mailings

When Defining Sort Levels and Options in your mailing, you can select advanced sorting options to provide additional options for creating trays/sacks and ordering your mail pieces. The information that displays in this window is determined by the options selected on the Sort Class and Piece Type window.



Advanced Tray Sorting Options




Advanced Sack Sorting Options

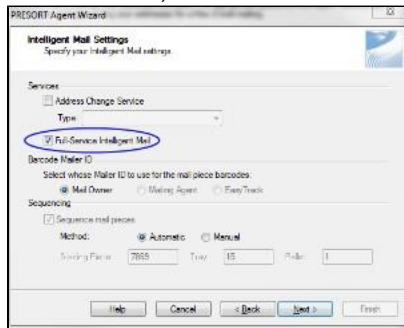
Select the appropriate Advanced Sorting Options:

- **Tray Order/Sack Order** — Select the order to print your tray or sack labels in ZIP Code order or Presort level order. If you are presorting your mail, you would select Presort level order.
- **Optional Tray/Sack Types** — If your Post Office requests a specific tray or sack type, select Only create full 5-digit carrier route trays/sacks or Create 3-digit carrier route trays/sacks. These options will be unavailable if your mailing does not qualify for them.
- **Other Options** — Select any of these options if they apply to your mailing.
- **Prepare trays without bundling** — This option is only available if you are mailing machinable, firstclass automation flats.
- **Use condensed postage statement if possible** — The USPS only accepts condensed postage statements for some types of mail.
- **Use Repositionable Notes** — Select this option if you are using repositionable notes in your mailing, as a surcharge applies to these notes. This option will correctly add the surcharge to the applicable rates, and the mailing reports will reflect this accordingly. This option is only available for First-Class Mail, Standard Mail, and Periodicals letters and flats.
- **Reduce overflow trays** — Select to place pieces in full trays of a lower sort level instead of placing pieces in less-than-full overflow trays. This option does not affect the cost of the mailing, but it is only available for First-Class automation letters and postcards and Standard Mail automation letters.
- **Force walk sequence saturation** — Select to include mail pieces that may not necessarily qualify for a sort, but a given Postmaster may permit them to be included. ACS recommends that you obtain approval from your Post Office before selecting this option.
- Specifying Intelligent Mail Settings

You will specify your Full-Service Intelligent Mail settings after you define your sort levels and advanced sorting options. The selections you make in this window determine what information is included in your Intelligent Mail barcodes.

1. Under Searches and Reports, click the **Labels** tab.
2. In the drop-down list, select **People** or **Staff/Organizations**. Click **Go** .
3. On the sidebar, select **Create a New Max It Mailing**, then click **Customize**.
4. On the **Report Options** tab, set up your mailing's address labels and click **Preview**.


- When the PRESORT Agent Wizard displays, proceed through the wizard, selecting the appropriate template, sort class and piece type, mail piece dimensions, mailing and permit information, Mail.dat information, and sort levels and advanced options. Click **Next**.



- Under **Services**, if you plan to use the Address Change Service in your Intelligent Mail Barcode, select **Address Change Service**, then select the appropriate option. **Note:** The available options are determined by the options selected on the Sort Class and Piece Type window. Your options will include OneCode, Traditional, and Manual Corrections.
- Select **Full-Service Intelligent Mail**.
- Under **Barcode Mailer ID**, select **Mail Owner** or **Mailing Agent**, according to the mailing permit. If you are the mail owner, the **Mailing Agent** option is disabled.
- Under **Sequencing**, select **Sequence mail pieces** to include a unique mail piece identifier in each barcode.
- For the sequencing **Method**, select **Automatic** or **Manual**. If you select **Automatic**, sequence numbers will be automatically assigned and will remain unique for the required 45 days. If you select **Manual**, you can set the **Starting Piece**, **Starting Tray**, and **Starting Pallet** number.

Entering Mail.dat Information

Use the Mail.dat Information window to enter the information needed to create the Mail.dat files you will save at the end of the PRESORT Agent Wizard.

- Under Searches and Reports, click the **Labels** tab.
- In the drop-down list, select **People** or **Staff/Organizations**. Click **Go** .
- On the sidebar, select **Create a New Max It Mailing**, then click **Customize**.
- On the **Report Options** tab, set up your mailing address labels and click **Preview**.
- When the PRESORT Agent Wizard displays, proceed through the wizard, selecting the appropriate template, sort class and piece type, mail piece dimensions, and mailing information.



- Enter the **License Holder**, **Verification Facility**, and **This Mailing** information. View the Additional Field Information for assistance.
- Click **Next**.

Saving the Mail.dat files and Printing the Postal Reports

OnDemand clients

The PostalOne! application provided by the USPS® is only compatible with Windows® operating systems.


With the new Full-Service Intelligent Mail requirements effective January 26th, 2014, you will save your postal reports as Mail.dat files and submit the files electronically through PostalOne!. You will no longer have to print out your Max It! reports and take them to the post office. You will just need to take your **Job ID** from PostalOne! along with your mailing to the Post Office. Note: You can print out your Postage Statement from PostalOne! which includes this Job ID.

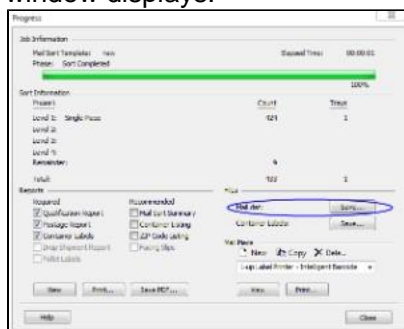
Note

The first time that you save the Mail.dat files to submit electronically, you will need to go through TEM Testing. After this has been completed, you will submit your live jobs to PostalOne!, then bring your Job ID along with your mailing to the Post Office.

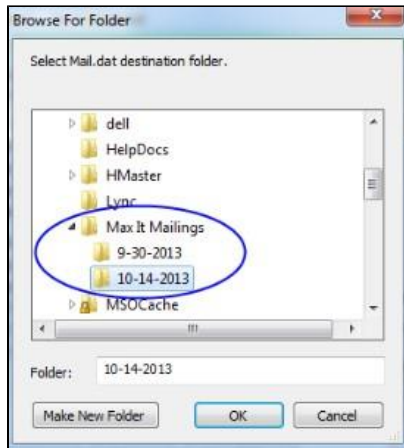
You can select to save the files to any folder on your hard drive, and we recommend creating a separate folder for these files. You may want to create a folder called Max It! mailings or bulk mailings, then create a sub folder for each time you run a mailing and save the Mail.dat files. The title of the sub-folders can be the dates you run your mailings.

You will notice that several files are saved; the only one you need to upload to PostalOne! is the .hdr file. You can register for a PostalOne! account [here](#).

1. Under Searches and Reports, click the **Labels** tab.
2. In the drop-down list, select **People or Staff/Organizations**. Click **Go** .
3. On the sidebar, select **Create a New Max It Mailing**, then click **Customize**.
4. On the **Report Options** tab, set up your mailing's address labels and click **Preview**.
5. The PRESORT Agent Wizard displays. Proceed through the wizard, selecting the appropriate template, sort class and piece type, mail piece dimensions, sort levels and advanced options, mailing and permit information, Mail.dat information, mail sort discounts, Intelligent Mail settings, and tray/sack labels.
6. Click **Finish** to sort your Max It bulk mailing. After sorting your Max It bulk mailing, the Progress window displays.







7. Under **Files**, click **Save** next to **Mail.dat**.
8. Select the location where you want to save the files, then click **OK**.




9. Once you have saved your files, you will locate the **.hdr file** and upload it to PostalOne!.

In the Reports section of the Progress window, you can still preview, print, and save the reports as a PDF for your records. You can also save the container labels for your Max It bulk mailing.

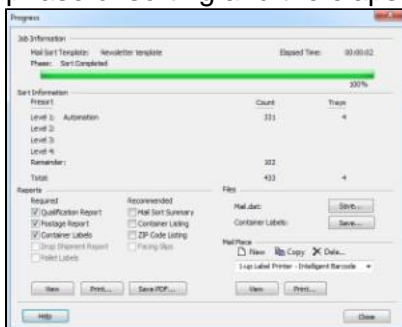
1. Under Searches and Reports, click the **Labels** tab.
2. In the drop-down list, select **People or Staff/Organizations**. Click **Go** .
3. On the sidebar, select **Create a New Max It Mailing**, then click **Customize**.
4. On the **Report Options** tab, set up your mailing's address labels and click **Preview**.
5. The PRESORT Agent Wizard displays. Proceed through the wizard, selecting the appropriate template, sort class and piece type, mail piece dimensions, sort levels and advanced options, mailing and permit information, Mail.dat information, mail sort discounts, Intelligent Mail settings, and tray/sack labels.
6. Click **Finish** to sort your Max It bulk mailing. After sorting your Max It bulk mailing, the Progress window displays.
7. Under **Reports**, select the required and recommended reports that you want to preview and click **Preview**.
8. The Preview Reports window displays. Click the **Up**  and **Down**  Arrows to scroll through the pages of your reports.
9. To print your reports from this window, click **Print**.

1. Under Searches and Reports, click the **Labels** tab.
2. In the drop-down list, select **People or Staff/Organizations**. Click **Go** .
3. On the sidebar, select **Create a New Max It Mailing**, then click **Customize**.
4. On the **Report Options** tab, set up your mailing's address labels and click **Preview**.
5. The PRESORT Agent Wizard displays. Proceed through the wizard, selecting the appropriate template, sort class and piece type, mail piece dimensions, sort levels and advanced options, mailing and permit information, Mail.dat information, mail sort discounts, Intelligent Mail settings, and tray/sack labels.
6. Click **Finish** to sort your Max It bulk mailing. After sorting your Max It bulk mailing, the Progress window displays.
7. Under **Reports**, select the required and recommended reports that you want to print and click **Print**.

1. Under Searches and Reports, click the **Labels** tab.
2. In the drop-down list, select **People or Staff/Organizations**. Click **Go** .
3. On the sidebar, select **Create a New Max It Mailing**, then click **Customize**.
4. On the **Report Options** tab, set up your mailing's address labels and click **Preview**.
5. The PRESORT Agent Wizard displays. Proceed through the wizard, selecting the appropriate template, sort class and piece type, mail piece dimensions, sort levels and advanced options, mailing and permit information, Mail.dat information, mail sort discounts, Intelligent Mail settings, and tray/sack labels.
6. Click **Finish** to sort your Max It bulk mailing. After sorting your Max It bulk mailing, the Progress window displays.
7. Under **Reports**, select the required and recommend reports that you want to save and click **Save as PDF**.
8. Select the location where you want to save your reports in the **Save in** drop-down list.
9. In the **File name** field, rename your reports and click **Save**.

The Progress Window in the PRESORT Agent Wizard

When you click Finish after selecting your tray or sack labels, your bulk mailing is sorted in Max It. The Progress window displays, and the status of the sort displays under **Job Information**, along with the phase of sorting and the elapsed time.




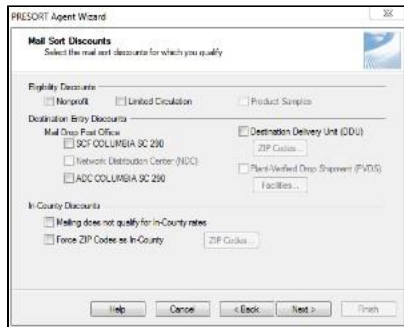
In addition, you can view a breakdown of how many pieces of mail were placed in each sort level, preview and print your postal reports, and preview and print your labels.

Selecting Mail Sort Discounts

In the Mail Sort Discounts window, select which discounts your mailing is eligible for.

If your mailing is not eligible for any additional discounts, this window does not display, and if you are not eligible for a particular type of discount, such as an in-county discount, that section does not display.


1. Under Searches and Reports, click the **Labels** tab.
2. In the drop-down list, select **People or Staff/Organizations**. Click **Go** .
3. On the sidebar, select **Create a New Max It Mailing**, then click **Customize**.
4. On the **Report Options** tab, set up your mailing's address labels and click **Preview**.
5. When the PRESORT Agent Wizard displays, proceed through the wizard, selecting the appropriate template, sort class and piece type, dimensions, mailing and permit information, Mail.dat information, sort levels and advanced options, and Intelligent Mail Settings. Click **Next**.

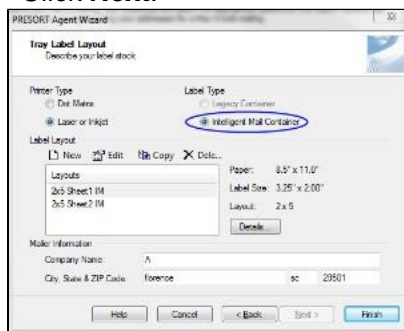


6. Under **Eligibility Discount**, select **Nonprofit rate** if your organization is eligible to receive nonprofit rates on mailings.
7. Under **Destination Entry Discounts**, select the **Mail Drop Post Office** where you will drop off your mail.
8. If you want to drop your mail off at a Destination Delivery Unit (DDU), select **Destination Delivery Unit (DDU)** and click **ZIP Codes** to enter or select the DDU.
9. If you are doing a drop shipment mailing, select **Plant-Verified Drop Shipment (PVDS)** and click **Facilities** to select the facility where you drop off the mailing.
10. Click **Next**.

Selecting Tray or Sack Labels

The last step in the PRESORT Agent Wizard is selecting the layout for your tray or sack labels. These labels will print with your postal reports.


1. Under Searches and Reports, click the **Labels** tab.
2. In the drop-down list, select **People** or **Staff/Organizations**. Click **Go** .
3. On the sidebar, select **Create a New Max It Mailing**, then click **Customize**.
4. On the **Report Options** tab, set up your mailing's address labels and click **Preview**.
5. When the PRESORT Agent Wizard displays, proceed through the wizard, selecting the appropriate template, sort class and piece type, dimensions, mailing and permit information, Mail.dat information, sort levels and advanced options, Intelligent Mail Settings, and mail sort discounts. Click **Next**.

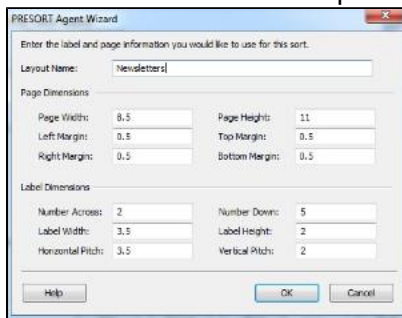


6. Under **Printer Type**, select whether you are using a **Laser, Inkjet**, or **Dot Matrix** printer.
7. Under **Label Type**, you select **Intelligent Mail Container**. Intelligent Mail labels display an Intelligent Mail barcode and are required for Full Service Intelligent Mail.
8. Under **Label Layout**, select a label layout template. When a template is selected, details and specific formatting settings display to the right of the grid.
9. To edit the label layout's properties, click **Details**.
10. Under **Mailer Information**, enter your **Company Name** and **City, State & ZIP Code**, then click **Finish**.

Working with Tray or Sack Label Templates

It's a good idea to create and save templates for your labels. The templates save your settings for bulk mailing labels so that you can apply these settings to future bulk mailings. You can create label layouts, edit label layouts, copy label layouts to create a new layout based on an existing layout's settings, or delete label layouts.




1. Under Searches and Reports, click the **Labels** tab.
2. In the drop-down list, select **People** or **Staff/Organizations** and click **Go** .
3. On the sidebar, select **Create a New Max It Mailing**, then click **Customize**.
4. On the **Report Options** tab, set up your mailing's address labels and click **Preview**.
5. The PRESORT Agent Wizard displays. Proceed through the wizard, selecting the appropriate template, sort class and piece type, dimensions, mailing and permit information, Mail.dat information, sort levels and advanced options, Intelligent Mail Settings, and mail sort discounts. Click **Next**.





6. Under **Label Layout**, click **New**.
7. Enter a **Layout Name**, **Page Dimensions**, and **Label Dimensions**. Click **OK**.
8. Select the new template in the grid to use it for your labels in the mailing and click **Finish**.

Previewing and Printing Max It Reports

In the Reports section of the Progress window, you can preview, print, and save the reports and container labels for your Max It bulk mailing. In addition, you can save the reports as a PDF (Portable Document Format) in a location on your computer or network. Saving reports lets you e-mail them.

1. Under Searches and Reports, click the **Labels** tab.
2. In the drop-down list, select **People** or **Staff/Organizations**. Click **Go** .
3. On the sidebar, select **Create a New Max It Mailing**, then click **Customize**.
4. On the **Report Options** tab, set up your mailing's address labels and click **Preview**.
5. The PRESORT Agent Wizard displays. Proceed through the wizard, selecting the appropriate template, sort class and piece type, mail piece dimensions, sort levels and advanced options, mailing and permit information, mail sort discounts, Intelligent Mail settings, and tray/sack labels.
6. Click **Finish** to sort your Max It bulk mailing. After sorting your Max It bulk mailing, the Progress window displays.
7. Under **Reports**, select the required and recommended reports that you want to preview and click **Preview**.
8. The Preview Reports window displays. Click the **Up**  and **Down**  Arrows to scroll through the pages of your reports.
9. To print your reports from this window, click **Print**.

1. Under Searches and Reports, click the **Labels** tab.
2. In the drop-down list, select **People or Staff/Organizations**. Click **Go** .
3. On the sidebar, select **Create a New Max It Mailing**, then click **Customize**.
4. On the **Report Options** tab, set up your mailing's address labels and click **Preview**.
5. The PRESORT Agent Wizard displays. Proceed through the wizard, selecting the appropriate template, sort class and piece type, mail piece dimensions, sort levels and advanced options, mailing and permit information, mail sort discounts, Intelligent Mail settings, and tray/sack labels.
6. Click **Finish** to sort your Max It bulk mailing. After sorting your Max It bulk mailing, the Progress window displays.
7. Under **Reports**, select the required and recommended reports that you want to print and click **Print**.

1. Under Searches and Reports, click the **Labels** tab.
2. In the drop-down list, select **People or Staff/Organizations**. Click **Go** .
3. On the sidebar, select **Create a New Max It Mailing**, then click **Customize**.
4. On the **Report Options** tab, set up your mailing's address labels and click **Preview**.
5. The PRESORT Agent Wizard displays. Proceed through the wizard, selecting the appropriate template, sort class and piece type, mail piece dimensions, sort levels and advanced options, mailing and permit information, mail sort discounts, Intelligent Mail settings, and tray/sack labels.
6. Click **Finish** to sort your Max It bulk mailing. After sorting your Max It bulk mailing, the Progress window displays.
7. Under **Reports**, select the required and recommend reports that you want to save and click **Save as PDF**.
8. Select the location where you want to save your reports in the **Save in** drop-down list.
9. In the **File name** field, rename your reports and click **Save**.

Before Closing the PRESORT Agent Wizard

Before you close the PRESORT Agent Wizard, you should create an address label or envelope template for your mailing or select an existing template.

If you are creating a Max It mailing for the first time or do not have any saved templates, you will need to create a new template. To create a new template, under **Labels and Envelopes**, click **New**, and follow the steps in the Label Designer Wizard.

If available, you can select and use an existing template under Labels and Envelopes. Then, click Preview to preview your mailing and edit its properties in the Label Designer.

The Max It Label Designer Wizard

The Label Designer Wizard lets you create templates for your address labels or envelopes and customize your address block. Click **Next** to proceed through the Wizard, and click **Back** if you need to edit information on a previous window.

When you finish creating a template in the Label Designer Wizard, you will have successfully:

- Selected a template type (Label- Sheet or Continuous, Envelopes- Graphical Output, or Envelopes- Plain-Text Output).
- Selected your printer type and model.
- Entered your label or envelope's size and dimensions, or selected this information from the list of predefined layouts.
- Selected your address block's properties and location.
- Named your new label or envelope template.
- Displayed your template in the Label Designer.

Printing Addresses on Envelopes or Mail Pieces

Warning

Effective January 2013, Intelligent Mail barcodes will be required for automation price eligibility. The USPS has eliminated automation discounts when using POSTNET barcodes. If you use POSTNET barcodes, your mailing may not be accepted. View more information.

In Max It, you can print addresses directly on your envelopes or mail pieces instead of labels.

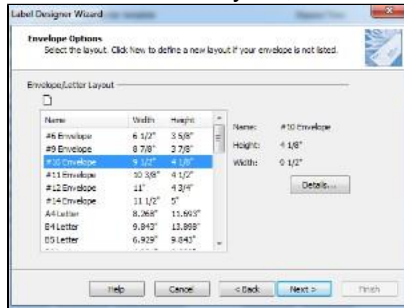
When you print addresses directly on your mailings, you must create a new template or use an existing template. These templates save your settings, so once you have established templates for your mailings, you can print addresses with a few clicks. This is helpful if you frequently send mailings using the same printer and same address label properties. Even if you use a template, you can still customize your label's layout in the Label Designer.

1. In the Progress window, under **Labels and Envelopes**, click **New**. The Label Designer Wizard displays.
2. Under **Template Type**, select **Envelopes - Graphical Output** or **Envelopes - Plain Text Output**. Click **Next**. The **Envelopes - Graphical Output** is for newer laser and inkjet printers that print graphics. If you have an older printer that requires a text file, select **Envelopes - Plain-Text Output**.

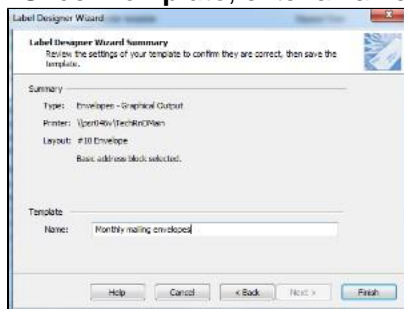




3. Under **Printer Type**, select your printer in the **Printer** drop-down list.


4. Depending on the type of printer you will use, select **Laser**, **Inkjet** or **Direct Impression**. If you select **Direct Impression**, be sure to select your printer's model in the grid.
5. Click **Next**.
6. Under **Envelope/Letter Layout**, click **New** to add a new label layout and enter the dimensions of the layout. Or, select your label layout from the common layouts that are displayed in the grid. The dimensions of the common layouts display to the right of the grid. If you want to view additional details about a layout, click **Details**.



7. Click **Next**.
8. Under **Address Block**, select the type of address block that you want to print on the label. To create a custom address block, select **Add a custom address block** and click **Define**. For more information, see Customizing your Address Block in the Label Designer Wizard.
9. Under **Address Block Location**, enter the indents of the address block in the **Left Indent** and **Top Indent** fields. Click **Next**.
10. The Label Designer Wizard Summary displays. Under **Summary**, verify your template type, printer type/model, layout, and address block selection.
11. Under **Template**, enter a name for this template in the **Name** field.





12. Click **Finish** to save the template and display the layout in the Label Designer.
13. In the Label Designer, preview your labels and make any necessary changes.
14. To preview and print your envelopes, click **Go to Preview Mode** . To begin printing the envelopes, click **Print** .

1. Under **Labels and Envelopes**, select the template that you want to use for printing your envelopes and click **Preview**.
2. OPTIONAL: To edit your layout, click **Go to Design Mode**  and make the corrections.
3. The Label Designer displays a preview of your envelopes as they will print. To print the envelopes, click **Print**.

Copying Max It Label and Envelope Templates


Max It allows you to copy label and envelope templates, saving you the work of creating a new template for each bulk mailing. When you copy a label or envelope template, make a copy of an existing template's settings in the Label Designer Wizard. Then, you can double-click the copied template in the Template grid and customize the appearance.

Copying a template can be useful if you have a new mailing that will use the same template type, printer type, label or envelope/letter layout, and address options as an existing template. You can then customize the appearance of a label, such as its color, font, and other aesthetic settings in the Label Designer.


1. In the Progress window, under **Labels and Envelopes**, select the template that you want to copy and click **Copy**.
2. When prompted, enter a name for the new template in the **Name** field. Click **OK**.
3. Double-click the new template in the **Template** grid to edit the address block's location on the envelope or label in the Label Designer.
4. When you have finished editing or customizing the address block of the label or envelope, click **Save**.
5. To print the labels or envelopes, click **Go to Preview Mode**  and click **Print** .

The Max It Label Designer

After you create a new template for your label or envelope in the Label Designer Wizard or select to print labels using the settings of an existing template, your labels display in the Label Designer.



If you created a new template for the labels or envelopes, the template displays in Design Mode after you click **Finish** in the Label Designer Wizard. In Design Mode, you can add, remove, or edit the elements on your label. Once you create your layout, it is saved to the Print Mail Template list. To preview your labels when in Design Mode, or to print your labels, click **Go to Preview Mode** .

If you selected to print labels or envelopes from an existing template under **Labels and Envelopes**, your labels will display in Preview Mode. Preview Mode displays the records as they will appear when printed.

To edit your label's appearance, click **Go to Design Mode** .

Printing your Labels or Envelopes in Max It

After you sort your addresses and design your label, you can print your address labels or envelopes from the Label Designer.

1. If you are in Design Mode in the Label Designer, click **Go to Preview Mode**  to preview your labels or envelopes.
2. Your labels or envelopes will display as they will print. To set up your labels or envelopes for printing, click **Print Records** .
3. The Print Setup window displays. Under **Printer**, select the printer you will use to print your address labels or envelopes from the drop-down list.
4. OPTIONAL: If needed, click **Advanced Settings** to edit your printer's settings, such as the paper tray and printer status. Otherwise, go to the next step.
5. Under **Print Range**, select the appropriate option (All Pages, Current Page, From Page, or From Tray). If you select From Page or From Tray, be sure to enter the page or tray range.
6. OPTIONAL: Under **Container/Group**, select **Pause printing at the end of group** and specify a time in the Wait drop down list. If you select this option, the printer will pause printing for the specified amount of time at the end of each bundle and tray. If you selected for user in the Wait drop-down list, you will have to manually resume printing from the computer.
7. Click **Print** to begin printing.