



iAddress Manual

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File Management

Registration

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

Complete the Product Registration form and click “Submit” (You must be connected to the internet to submit the registration form). If you do not have access to the Internet, you can register offline by clicking this button and following the instructions provided. Serial numbers were issued with your software purchase; if you were not issued serial numbers or do not have a record of them, please contact Flagship Software technical support. Once you have your serial numbers, select Register from the Help menu.

 Product Registration ×

You will need to be connected to the internet to proceed.

Company Name	
Contact Name	
Contact e-mail	
Address 1	
Address 2	
City	
Province/State	
Postal Code/ZIP	
Serial Number	

Register Offline

Upload License File

Submit

Cancel

Create a Job

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

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

Multiple Tables in a Database

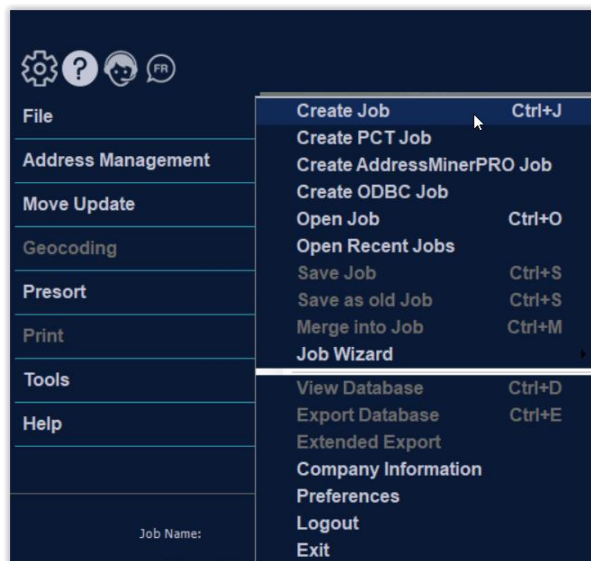
If multiple tables exist in the database, a window will appear listing the tables and the number of records in each table. Select the table you want to use, then double click or click “Done”.

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

Text Files

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

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





Selecting Address Fields

iAddress™ will automatically attempt to match the database fields to the appropriate iAddress™ fields. You can override these entries and select fields iAddress™ was unable to locate. From the drop down list under each iAddress™ field, scroll and select the database field that corresponds to the information required by the program.

For example:

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

Single Field Data

Canada:

- City, Province and Postal CodeOM, you must check the “One Field: City Province Postal / ZIP” box
- City and Province, you must check the “One Field: CityProvince” box

US

- City, State, and Zip CodeTM, you must check the “One Field: City State Zip(Zip+4)” box
- City and State, you must check the “One Field: City State” box

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

Multiple Field Components

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

Language Indicator (Canada)

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

To view your data

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

Using Templates

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

Character Set

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

Using Customer Information

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

Remove Header Row

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

Sélectionner le format du texte

Aperçu:

```
"John","Smith","395 av Caledonia","Dorval","QC","H9S2Y1","E"
"John","Smith","363 Hale St","London","ON","N5W1G5","E"
"John","Smith","1720 av Wilshire","Dorval","QC","H9P1S4","E"
"John","Smith","125 av Seigniory","Pointe-Claire","QC","H9R1J8","E"
"John","Smith","76 Gladstone Ave","London","ON","N5Z3R3","E"
"John","Smith","1935 rue Depatie","Saint-Laurent","QC","H4L4B2","E"
"John","Smith","50 Circle Rd","Beaconsfield","QC","H9W6B7","E"
"John","Smith","527 Bobbybrook Dr","London","ON","N5X1G8","E"
"John","Smith","1349 Oxford St W","London","ON","H6H1W1","E"
"John","Smith","1-491 boul Neptune","Dorval","QC","H9S2L7","E"
"John","Smith","850 St E av","Lachine","QC","H8T3W6","E"
"John","Smith","100 Madison Ave","London","ON","N5Z3D4","E"
```

Sélectionner le format du fichier texte:

☐ Champs de longueur fixes
 ☐ Définir le délimiteur

☐ Délimité par des tabulations
 ☒ Valeurs délimitées par virgule

☐ Première Rangée est une Rangée en-tête

☒ Charger toutes les colonnes comme colonnes textes

☐ UTF-8

Continuer > Annuler

Select Address

Job Information

Name:

Customer:

Seed Records:

Template

New Template

Save Delete

Data Formatting

US or Canada

☐ US CA aprx 100%
☒ CA US aprx 0%
 Unknown aprx 0%

Database Information

First Name (optional)

Last Name (optional)

Language Indicator (optional)

English

French

Name Fields (optional)

Address

City

Province

Postal / ZIP

☐ One Field: City Province Postal / ZIP
☐ One Field: City Province
☐ Postal Code List
☒ Expand Address Fields

Country (optional)

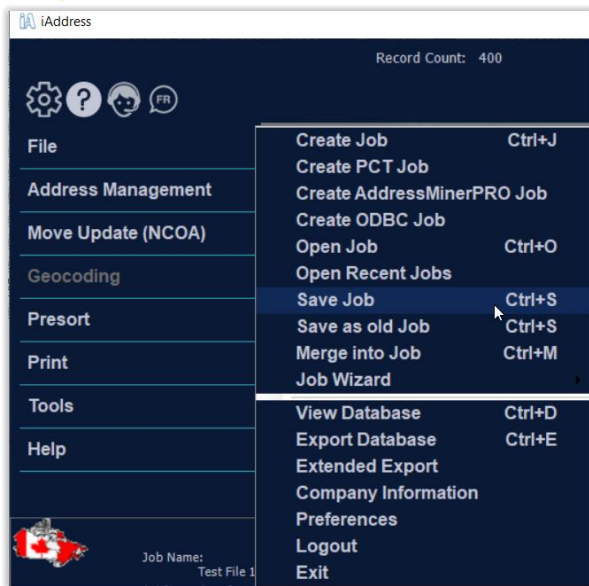
Weight g

Thickness mm

Database Preview

1	FirstName
2	LastName
3	Address1
4	Address2
5	CityProvPC
6	CityName
7	Province
8	PostalCode
9	Language

Cancel OK



AddressMinerPRO

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

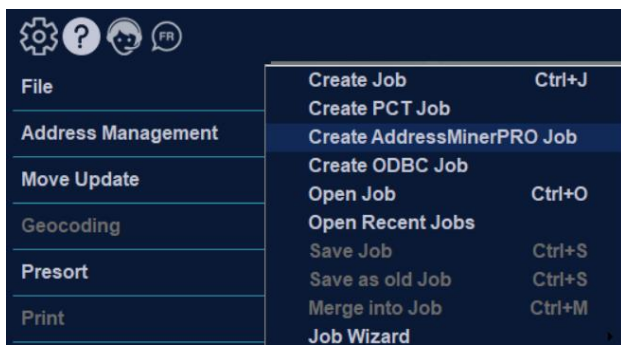
Using AddressMinerPRO is quite simple; it integrates directly into iAddress™ and guides you through the process of importing your data into iAddress™. A few quick clicks and AddressMinerPRO will import your data directly into iAddress™.

Starting AddressMinerPRO

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

Selecting Your File

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



Selecting Text Format (Text files only)

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

Data Preview

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

Complete The Parsing

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

Label Formatted Files

- On the start screen if you check off “Label File”, AddressMinerPRO will then convert a label formatted text file into a proper data format and import it into iAddress™.

Select Type of Label Format

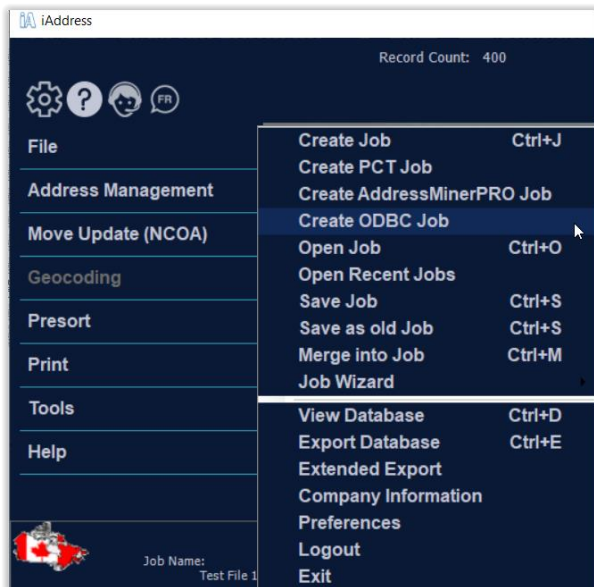
- On the next screen you simply specify in what format your label formatted text file is. If the labels are separated by blank lines, then you would select “Line Feed”. If they are separated by a form feed, then you select “Form Feed”. If your labels are fixed line (for



example, every label is 5 lines long) you would select “Fixed Line” and specify the number of lines. When you click continue, AddressMinerPRO will process your file and import the results into iAddress™. NOTE: There is no preview screen since AddressMinerPRO will automatically detect the data after converting the label to a readable record.

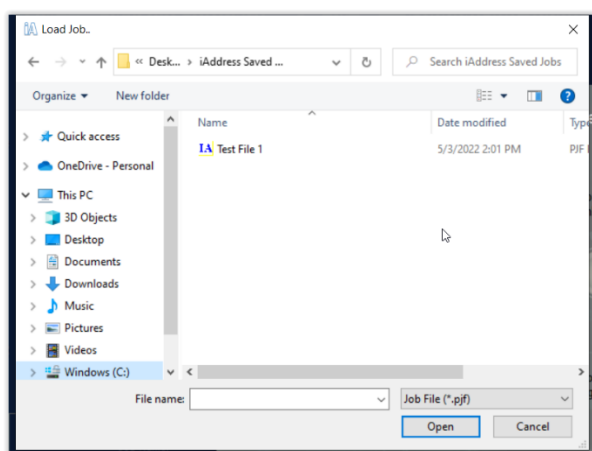
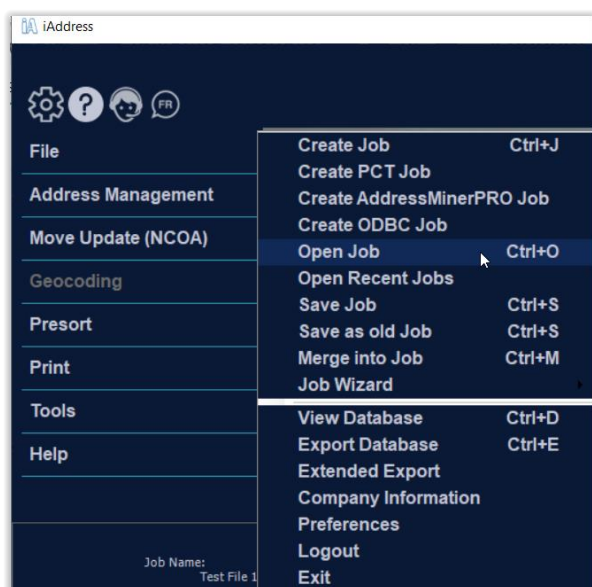
Create ODBC Job

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



Open a Saved Job

Open Job allows you to work on saved jobs. Select “Open Job” from the File menu. When the file list appears, select the appropriate .pjf file and click “OK”.



Merge into Job

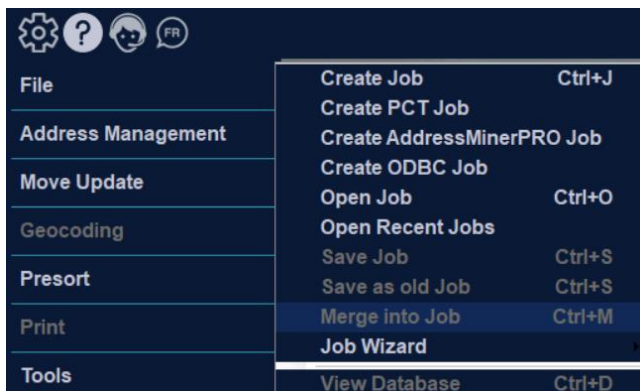
iAddress™ has a feature that allows you to combine two or more databases into a single mailing job. To merge databases, you must open the first database using the Create Job or Create ODBC Job command from the main menu and select the appropriate fields. When this has been completed for the first database,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

The Merge Databases function must be performed prior to Validation.

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

Merging Additional Files

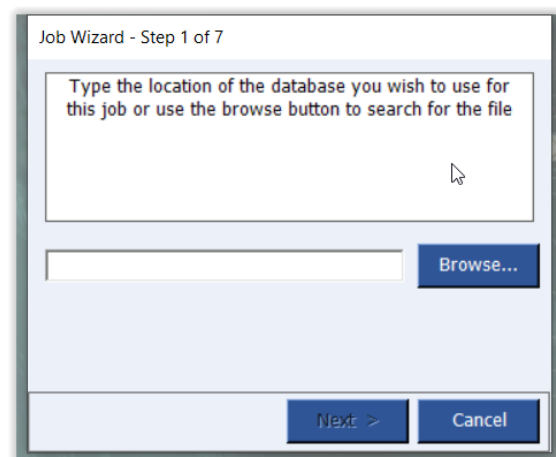
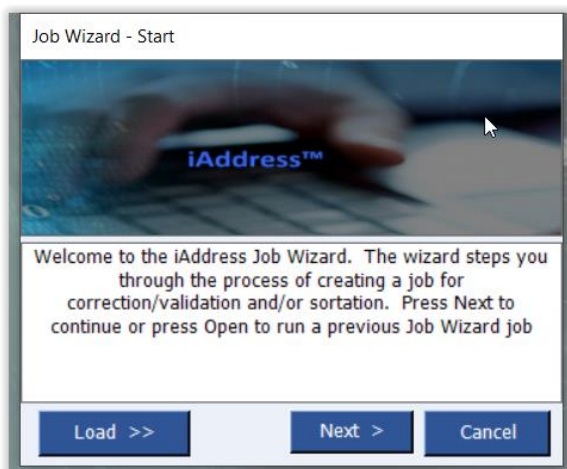
- To add additional databases, simply select Merge Databases again from the main menu and follow the above steps.
- iAddress™ numbers the imported files 1, 2, 3, etc. If you wish to retain this field (MergeFile) on export, you must select Extra Control Fields on the Export Database screen.



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

Job Wizard

Follow the Job Wizard screens and the appropriate selections according to your mailing. When you are finished, press the Finish button to run the job.



Job Wizard - Step 2 of 7

Enter a name for this job:

2022-05-03_15-07-04

Enter the mailing date for this job:

5/ 3/2022

Mail On Behalf

Customer Name

Seed Records:

< Back Next > Cancel

Job Wizard

	F1	F2	F3
▶	FNAM	LNAM	ADD
	Flagship	Software Ltd.	1-2 Vata Court
	Flagship	Software Ltd.	1-2 Vata Court
	Flagship	Software Ltd.	1-2 Vata Court
	Flagship	Software Ltd.	1-2 Vata Court

Is the first row a header row?

☒ Yes

☐ No

< Back Next > Cancel

Job Wizard

	F1	F2	F3
▶	FNAM	LNAM	ADD
	Flagship	Software Ltd.	1-2 Vata Court
	Flagship	Software Ltd.	1-2 Vata Court
	Flagship	Software Ltd.	1-2 Vata Court
	Flagship	Software Ltd.	1-2 Vata Court
	Flagship	Software Ltd.	1-2 Vata Court

How is your City, Province, and Postal / ZIP formatted?

☒ In separate columns

☐ City and Province in one column

☐ All in the same column

< Back Next > Cancel

Job Wizard

	FNAM	LNAM	ADD
▶	Flagship	Software Ltd.	1-2 Vata Court
	Flagship	Software Ltd.	1-2 Vata Court
	Flagship	Software Ltd.	1-2 Vata Court
	Flagship	Software Ltd.	1-2 Vata Court
	Flagship	Software Ltd.	1-2 Vata Court
	Flagship	Software Ltd.	1-2 Vata Court

Select the fields which contain the Address information

Address 1 ADD

Address 2 (optional)

< Back Next > Cancel

Job Wizard

	FNAM	LNAM	ADD
▶	Flagship	Software Ltd.	1-2 Vata Court
	Flagship	Software Ltd.	1-2 Vata Court
	Flagship	Software Ltd.	1-2 Vata Court
	Flagship	Software Ltd.	1-2 Vata Court
	Flagship	Software Ltd.	1-2 Vata Court
	Flagship	Software Ltd.	1-2 Vata Court

Select the fields which contain the City, Province, and Postal / ZIP information

City

Province

Postal / ZIP

< Back Next > Cancel

Job Wizard

	FNAM	LNAM	ADD
▶	Flagship	Software Ltd.	1-2 Vata Court
	Flagship	Software Ltd.	1-2 Vata Court
	Flagship	Software Ltd.	1-2 Vata Court
	Flagship	Software Ltd.	1-2 Vata Court
	Flagship	Software Ltd.	1-2 Vata Court
	Flagship	Software Ltd.	1-2 Vata Court

Select the fields which contain the name information (optional, press next to skip)

First Name (optional)

Last Name (optional)

Name (optional)

Name2 (Optional)

Name3 (Optional)

< Back Next > Cancel

Job Wizard

	FNAM	LNAM	ADD
▶	Flagship	Software Ltd.	1-2 Vata Court
	Flagship	Software Ltd.	1-2 Vata Court
	Flagship	Software Ltd.	1-2 Vata Court
	Flagship	Software Ltd.	1-2 Vata Court
	Flagship	Software Ltd.	1-2 Vata Court
	Flagship	Software Ltd.	1-2 Vata Court

Select a language field (optional, press next to skip):

Language(optional)

English Symbol

French Symbol

< Back Next > Cancel

FormSelectWizardOptions

Select your job processing options

☐ Field Formatting

☒ Correction

☐ Duplicate Removal

☐ Filter Mailing

☐ NCOA (No NCOA subscription or records)

☐ Post Filter

☐ Move Update DNM Only

☐ Post Filter

☐ Geocoding

☒ Sortation

☐ Sort only if 95% Valid

☐ Genderize

☐ Export

< Back Next > Cancel

Job Wizard

Select correction options

☐ Machineable - Formats to Machineable standards
☐ Use Accents - Adds accents to French names
☐ Western Style - Formats to Western Style
☐ Update LVR - Updates Large Volume Receivers
☐ Update Valids - Formats addresses deemed valid
☒ Minimum SERP Rural Standards
☒ Place a Space In the Postal Code (OM)
☐ Mixed case address components

Use imported city name

< Back

Next >

Cancel

Job Wizard

Select the way you want your addresses to be formatted:

Casing

☐ Upper/Lower Case i.e. 123 Flagship R
OR
☒ All Upper Case i.e. 123 FLAGSHIP RO

Shorten

☐ Shorten Address i.e Street -> St.
OR
☒ Full Street Type i.e. St. -> Street

Number of Lines

☐ Prefer Two Line Output
OR
☐ Force One Line Output
OR
☒ No Preference

< Back

Next >

Cancel

Job Wizard

Select the method to determine the language of the addresses

☒ Automatically determine the language of an address and convert
☐ Convert all addresses to English
☐ Convert all addresses to French
☐ Make all Quebec addresses French, all others English
☐ By a Language Indicator field

English

French

< Back

Next >

Cancel

Job Wizard

Select report printing options.

Reports

DO NOTHING
Options

Not printing or saving reports

Prefix files with (optional)

< Back

Next >

Cancel



Select the mailing date of the sortation.

Mailing Date

You have 8 days to deposit your mail. (due May 12, 2022)

Template

Customer

Client Info.

Tax Rate Reference

Addresses Included in Sort

☒ Uncorrectable ☒ Retired Postal Code

☒ Questionable ☐ Uncoded as residue

☐ Split large bundles (S/L > 100 mm and O/S > 200 mm)

☐ Do Phantom Mailing

Select the type of sortation for this job

☒ Personalized Mail (SH) (Formerly Addressed Admail)

☐ Personalized Mail Machineable

☐ Personalized Mail Machineable Labels Only

☐ Publication Mail (SH) (Formerly LCP)

☐ Publication Delivery Facility Presort (Formerly NDG)

☐ Publication Mail Machineable

☐ Incentive Lettermail Machineable

☐ Incentive Lettermail Machineable Labels Only

☐ Postal Code Targeting (SH)

☐ Postal Code Targeting Machineable

Select the type of container you will be using for this job

Mail Size

☒ Standard ☐ Oversized

☐ Dimensional ☐ Rigid

Container Type

☒ Letterflattainer - LFT ☐ Flat Tub

Pallets

☒ None ☐ Pallet ☐ Monotainer

Brick Piling

☐ Brick Pile ☐ Level 3 (DCF)

☐ Residue (Special Permission is required) ☐ Level 4 (FCP)

Specify the dimensions of your piece and specify container and bundle maximums.

Mail Characteristics

☐ Variable Weight/Thickness

Thickness mm Weight* g

Length mm Height mm

Max. # of Pieces in a Bundle:

Max. # of Pieces in a Container:

Select the office of deposit of your mailing.

Office of Deposit

Office of Deposit Postal Code

Office of Deposit Site Number

Choose the filename for your mailing plan and printing options.

☐ Mailing Plan File

Labels

Not printing or saving labels

Prefix files with (optional)

Reports

Not printing or saving reports

Prefix files with (optional)

Job Wizard - Save Job

If you want iAddress to automatically save your job after correction and/or sortation, select the name of the job file name here, otherwise leave blank to skip saving.

Save Job After Correction

Save Job After Sortation

Save Complete Job Title

Job Wizard - Completed!

The Job Wizard is now completed! Press Finish to run your job now or press Save to save your settings to run your job at another time



Company Information

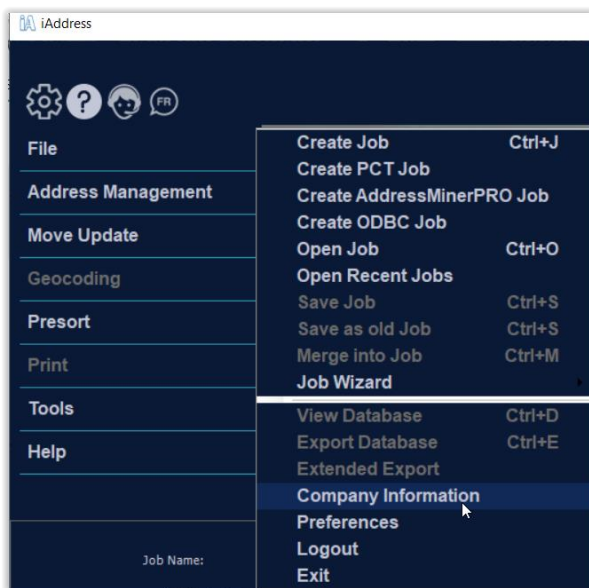
Under the file menu tab scroll down to “Company information”. Here you can enter information you would like to be visible in reports.

The first tab, “Company Information” requires the following:

- Your company’s name
- Your complete mailing address

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

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



Company Information

Company Information | Customer Information | U.S. Publication Information | Seed Records | Seed Groups | Job Details

Company Name
Flagship Software

Contact Name
Support

Address
1-2 Vata Court

Telephone Number
(416) 410-6357

City
Aurora
Province/State
ON

Postal / Zip
L4G 4B6
Country
CA

Email
support@flagshipsoftware.com

CPC & USPS Account Numbers and IDs

☒ Synchronize customer data on server

Settings OK Cancel

Company Information

Company Information | Customer Information | U.S. Publication Information | Seed Records | Seed Groups | Job Details

Customer Name

Address

City

Prov/State
Postal / Zip Code

Email

CPC & USPS Account Numbers and IDs

Add to List Save Customer Copy Customer Clear

ID	Customer Name	Address	City	Prov/State	Postal/Zip Code	Email	Column8	Column9
1	ABC Company	123 Main St	Toronto	ON	M5H 1A5			
2	XYZ Company	456 Queen St W	London	ON	N6H 2M6			
3	ABC Company	789 King St	Richmond Hill	ON	L4B 1A1			

Delete

Settings OK Cancel



Customer ID Codes

Canada Post

Account Number

1234567

Contract Number

NCOA Terms of use ID

EU123456789

Unites States Postal Service

Permit Number

Add

Go to Business Customer Gateway

Remove

PAF ID

Add

Mailer

CRID

Add

Remove

Remove

Done

Cancel

Company Information

Company Information | Customer Information | U.S. Publication Information | Seed Records | Seed Groups | Job Details

Serial Number of the Delivery Mode Data CD P3102025561101

Office of Deposit

CALGARY AB

Ex: Toronto
ON

Office of Deposit Postal / ZIP

T2E0A0

Site Number

1066

Tax at 0 %

List Offices of Deposit

Origin Zip

Origin City

Origin State

Settings

OK

Cancel

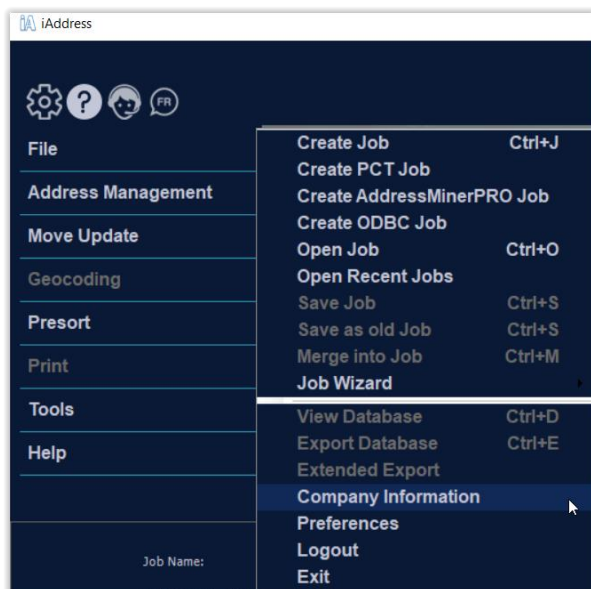
Seed Records

You can create seed records to add to your database. Add the records using the Seed Records tab under the Company Information screen.

The seed records will be stored as a separate database that you can add to your current job using the “Add to Current Database” button. Normally seed records are added at the Select Address screen.

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

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



Company Information

Company Information | Customer Information | U.S. Publication Information | Seed Records | Seed Groups | Job Details

First Name Last Name

Name1 Name2 Name3

Address1

Address2

City Province PC

ID	firstName	lastName	name1	name2	name3	address1	address2	City	Province	postalZip
	Technical	Support				1-2 Vata Court		Aurora	ON	L4G 4B6

Company Information

Company Information | Customer Information | U.S. Publication Information | Seed Records | Seed Groups | Job Details

Seed Groups

.... New Group

Seed Records

ID	firstName	lastName	name1	name2	name3	address1	address2	City	Province	postalZip
	Technical	Support				1-2 Vata Court		Aurora	ON	L4G 4B6

View Database & Export

View Database permits you to view your iAddress™ database in a table-style view. You may edit or delete records in this mode. From the File menu, select “View Database”.

In this view, you may look at:

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

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

Note:

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

Deleting Records

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

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

Export database

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

- **Valid addresses:**

All valid addresses from the original database are retained.

- **Corrected addresses:**



All addresses corrected by iAddress™ are retained.

- **Uncorrectable:**

Addresses iAddress™ was unable to correct are retained.

- **Questionable addresses:**

Addresses that are listed as Questionable by iAddress™

- **Export in original order:**

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

- **Extra control fields:**

Fields created by iAddress™ during correction/validation and presentation.

- **Add original address fields:**

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

- **Include all other fields from original database:**

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

- **Include audit log:**

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

- **Add leading zeros to list order:**

Helps retain numeric formatting for dBase files.

- **Add correction fields:**

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

- **Add status and comment:**

Allows you to enter information about individual records.

- **Add address components:**

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

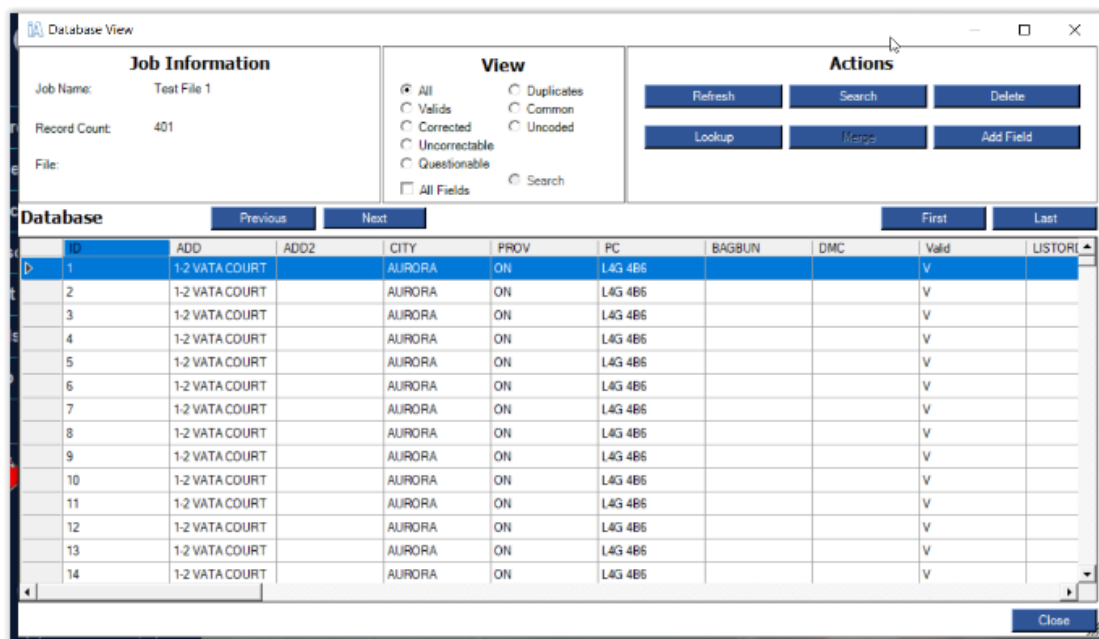
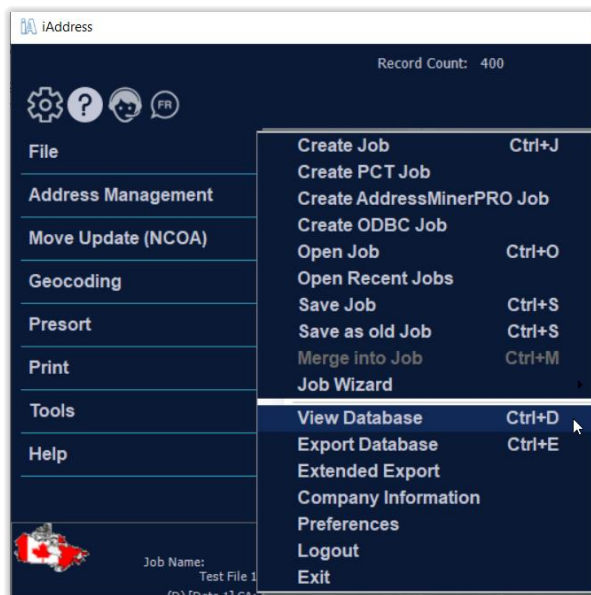
- **Choose export fields:**

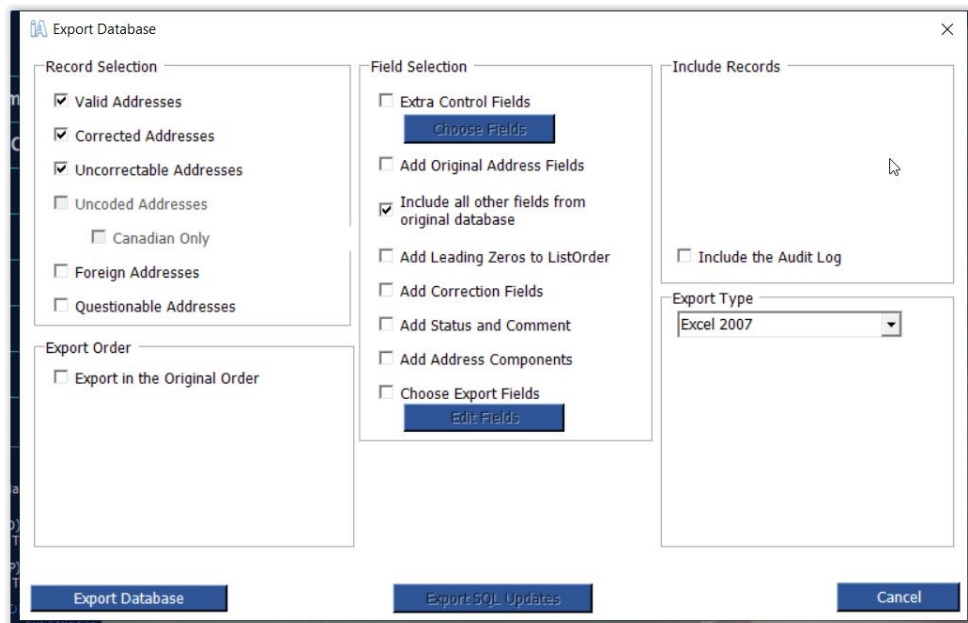
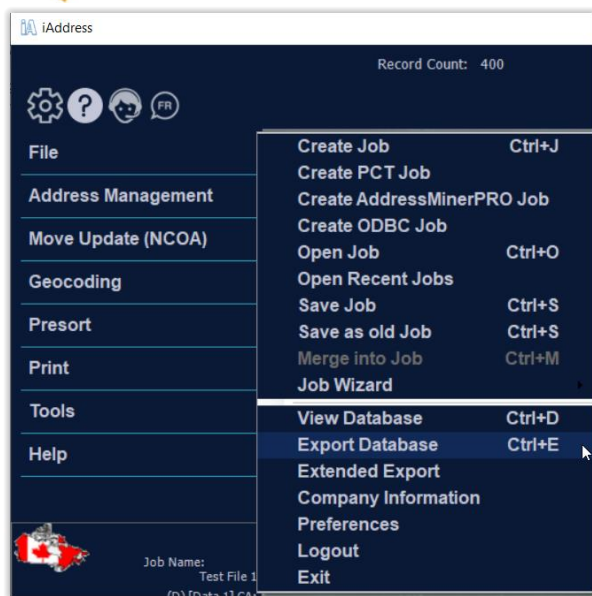
Allows you to choose specifically which fields you would like to export.

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

- Uncoded records
- Foreign records

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





Preferences – Default Settings

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

Language

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

Enable Audit Trailing

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

NCOA (SSL) Secure Transfer

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

Check for Updates on Startup

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

AutoSave

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

To prevent auto saves, turn this option to “OFF”.

Important!

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

Data Paths

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

Default Paths

You may set the default folder that iAddress™ uses when it:

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



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

Postal Data Location

Lists the paths where iAddress™ stores its data files.

DBF Code Page

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

CA Sort Preferences

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

Bundle Breaks

- During the sortation process, you may choose to indicate the first, last, or first and last piece of each bundle, container, or pallet. The default characters provided indicate the breaks; if you would prefer to change them simply enter a new character for each type of container. If you do not wish to have the breaks indicated uncheck the "Bag/Bun column add bundle break" checkbox.

OEL

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

Important!

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

Pallet/Monotainer Defaults:

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

US Sort Preferences

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

Number of Stars in front of the Optional Endorsement Line

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

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

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

Use Code 128 Barcodes for Tray Labels

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

Container / Bundle Markings

Break String On:

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

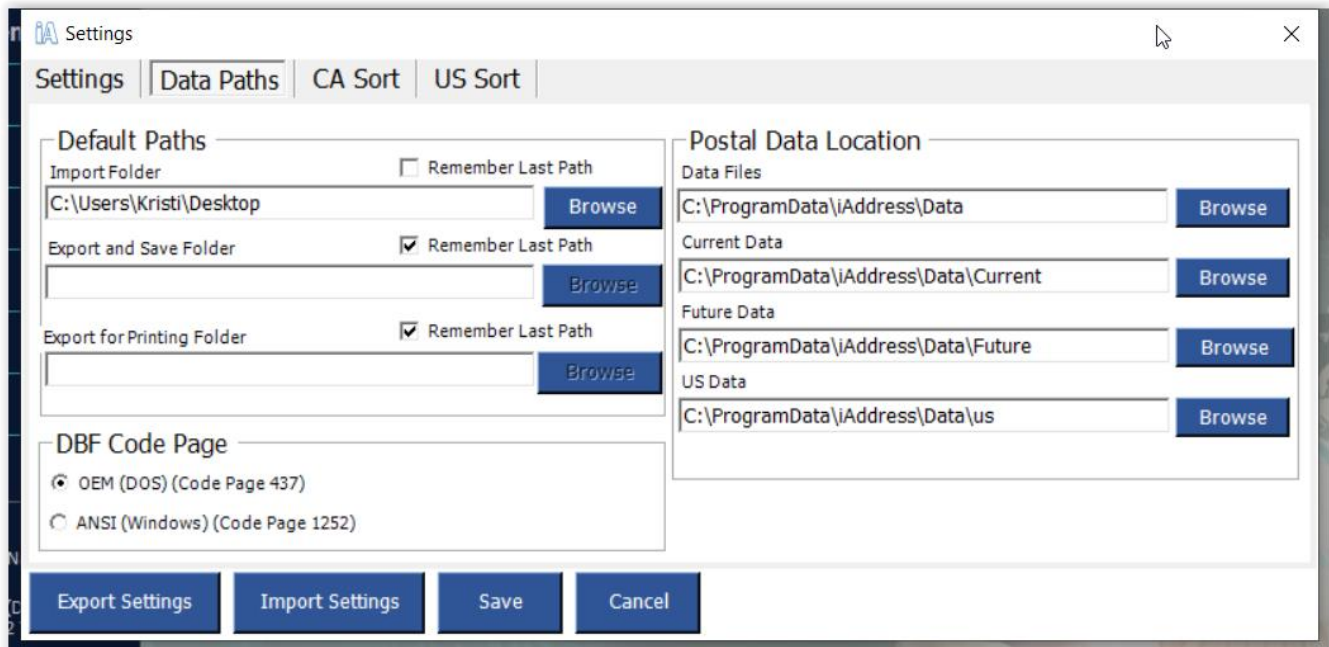
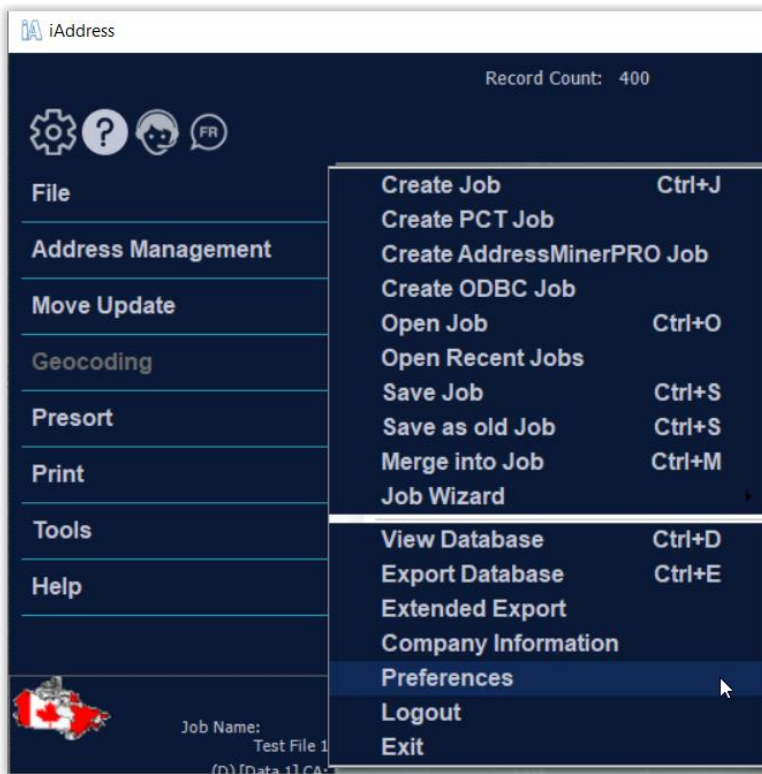
Bundle/Container/Pallet Markings

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

Optional Endorsement Line on Bundle Sorts

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

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



Settings | **Data Paths** | **CA Sort** | **US Sort**

Bundle Breaks

Break string on: piece of the bundle/container/pallet

Bundle string: Container/Bun column add bundle break ☒

Container string:

Pallet string: Bundle Breaks in seperate column ☒

City string:

OEL Number of stars: OEL stars on front and end ☐

Text Report Margin:

Container Label

Left Margin Offset: Top Margin Offset:

Pallet/Monotainer Defaults

	Pallets	Monotainer
Minimum Letterflatainers	24	24
Maximum Letterflatainers	64	40
Minimum Flat Tubs	12	12
Maximum Flat Tubs	32	24
Minimum Height (Brick Pile)	300	300 m
Maximum Height (Brick Pile)	1300	990 m
Maximum Weight	875	803 Kg

Export Settings **Import Settings** **Save** **Cancel**

Extended Export

This is an export screen designed to give you full control over the export of your data from iAddress™ in a clear and intuitive fashion. As seen below, there are 4 main sections on the Extended Export screen: Record Types, Fields, Order and Export Options.

Record Types

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

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

Fields

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



or multiple fields and using the arrow buttons underneath the exported field list allows you to reorder the fields.

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

Order

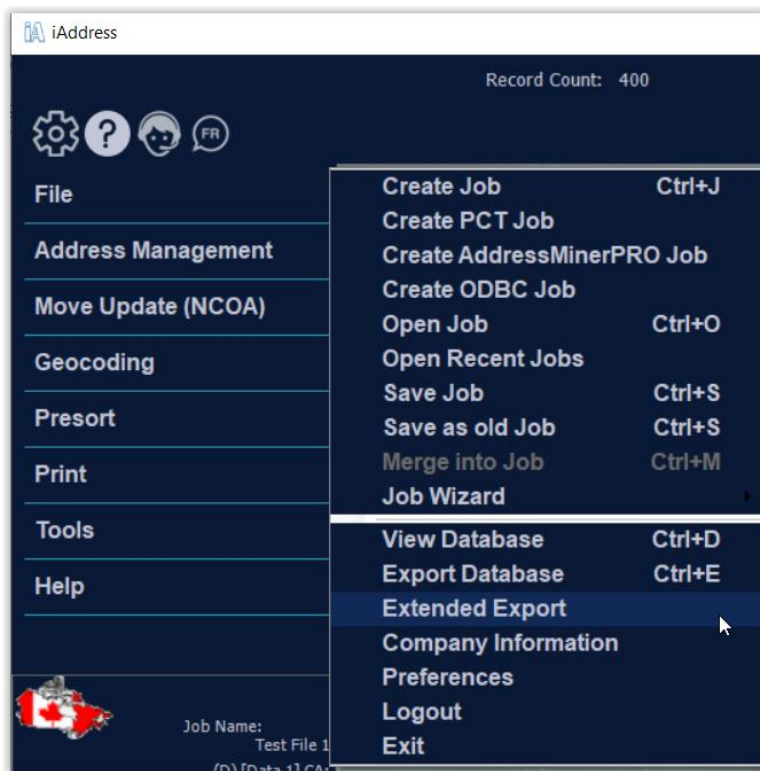
The order section allows you to set which order the exported file will be in.

Export Options

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

Support

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



Select Record Types

Select the record types to include in the export

Correction Status

☒ Valid Addresses
☒ Corrected Addresses
☒ Uncorrectable Addresses
☒ Foreign Addresses
☒ Questionable Addresses

Move Update

☒ Matches
☒ Individual
☒ Family
☒ Business
☒ Nonmatches
☒ Unmatchables
☐ Nixes
☐ DNM Records
☐ Deceased Records

Sortation

☒ Sorted Addresses
☒ Uncoded Addresses
☐ Canadian Only

Select Fields

Select fields to be included in the export. Use the shortcut buttons below to add fields quickly

IN_FNAME
IN_LNAME
ORIGADD
ORIGCITY
ORIGPROV
ORIGPC
ORIGADD2
BAGBUN
DMC
SORTEDID
ListOrder
Dupes
IsDupe
IsCommon
Correct
Correct_Text
Valid
MERGEFILE
AddType
BREAKS
IADDSTATUS
BUN
BUNTYPE
BAG

+

+

Input Order

ADD
CITY
PROV
PC
ADD2
COUNTRY

☐ Add Leading Zeros to ListOrder

Quick Select (Shortcut)

Correction Fields

Address Component

Sort Fields

Original Address Fields

All Other Original Fields

New Template

Save

Delete

Order

☒ Original Order
☐ Reverse Order
☐ Sort Order (ListOrder)
☐ Reverse Within Bundles
☐ Reverse Sort Order
☐ Order by user defined field

Field

☐ Unsorted records at end

Export Options

☐ Include the Audit Log
Export Type
[MS Access ACCDB]

Filename

Browse

Export

Close

Extended Export

Select Record Types

Select the record types to include in the export

Correction Status

☐ Valid Addresses
☐ Corrected Addresses
☐ Uncorrectable Addresses
☐ Foreign Addresses
☐ Questionable Addresses

Move Update

☐ Matches
☐ Individual
☐ Family
☐ Business
☐ Nonmatches
☐ Unmatchables
☐ Nixes
☐ DNM Records
☐ Deceased Records

Sortation

☐ Sorted Addresses
☐ Uncoded Addresses
☐ Canadian Only

Select Fields

Select fields to be included in the export. Use the shortcut buttons below to add fields quickly

IN_FNAME
IN_LNAME
ORIGADD
ORIGCITY
ORIGPROV
ORIGPC
ORIGADD2
BAGBUN
DMC
SORTEDID
ListOrder
Dupes
IsDupe
IsCommon
Correct
Correct_Text
Valid
MERGEFILE
AddType
BREAKS
IADDSTATUS
BUN
BUNTYPE
BAG

→

←

↑

↓

Input Order

ADD
CITY
PROV
PC
ADD2
COUNTRY

☐ Add Leading Zeros to ListOrder

Quick Select (Shortcut)

Correction Fields

Address Component

Sort Fields

Original Address Fields

All Other Original Fields

New Template

Save

Delete

Order

☒ Original Order
☐ Reverse Order
☐ Sort Order (ListOrder)
☐ Reverse Within Bundles
☐ Reverse Sort Order
☐ Order by user defined field

Field

☐ Unsorted records at end

Export Options

☐ Include the Audit Log
Export Type
[MS Access ACCDB]

Filename

Browse

Export

Close

Extended Export

Select Record Types

Select the record types to include in the export

☐ Valid Addresses

☐ Corrected Addresses

☐ Uncorrectable Addresses

☐ Foreign Addresses

☐ Questionable Addresses

More Updates

☐ Matches

☐ Individual

☐ Family

☐ Business

☐ Neomatches

☐ Unmatchables

☐ Names

☐ Order Records

☐ Deleted Records

Sortation

☐ Sorted Addresses

☐ Unsorted Addresses

☐ Canadian Only

Select Fields

Select fields to be included in the export. Use the shortcut buttons below to add fields quickly

BL_FNAME

BL_LASTN

ORGADD

ORGCTRY

ORGPROV

ORGPC

ORGADD2

BLGLEN

ORC

SORTEDB

SortOrder

Pages

ISPage

ISCommon

Correct

Correct_Text

Valid

WERGEFILE

ADType

BREAKS

INDUSTATUS

BUN

BUNTIME

BAG

ADD

CTRY

PROV

PC

ADD2

COUNTRY

☐ Add Leading Zeros to ListOrder

Quick Select (Shortcut)

Unsorted Fields

Sorted Fields

Sort Order

Original Address Fields

All Other Original Fields

New Template

Save Delete

Order

☒ Original Order

☐ Reverse Order

☐ Sort Order (Listorder)

☐ Reverse Within Bundles

☐ Reverse Sort Order

☐ Order by user defined field

Field

☐ Unsorted records at end

Export Options

☐ Include the Audit Log

Export Type

MS Access ACCDB

Filename

Browse

Export Close

Extended Export

Select Record Types

Select the record types to include in the export

☐ Valid Addresses

☐ Corrected Addresses

☐ Uncorrectable Addresses

☐ Foreign Addresses

☐ Questionable Addresses

More Updates

☐ Matches

☐ Individual

☐ Family

☐ Business

☐ Neomatches

☐ Unmatchables

☐ Names

☐ Order Records

☐ Deleted Records

Sortation

☐ Sorted Addresses

☐ Unsorted Addresses

☐ Canadian Only

Select Fields

Select fields to be included in the export. Use the shortcut buttons below to add fields quickly

BL_FNAME

BL_LASTN

ORGADD

ORGCTRY

ORGPROV

ORGPC

ORGADD2

BLGLEN

ORC

SORTEDB

SortOrder

Pages

ISPage

ISCommon

Correct

Correct_Text

Valid

WERGEFILE

ADType

BREAKS

INDUSTATUS

BUN

BUNTIME

BAG

ADD

CTRY

PROV

PC

ADD2

COUNTRY

☐ Add Leading Zeros to ListOrder

Quick Select (Shortcut)

Unsorted Fields

Sorted Fields

Sort Order

Original Address Fields

All Other Original Fields

New Template

Save Delete

Order

☒ Original Order

☐ Reverse Order

☐ Sort Order (Listorder)

☐ Reverse Within Bundles

☐ Reverse Sort Order

☐ Order by user defined field

Field

☐ Unsorted records at end

Export Options

☐ Include the Audit Log

Export Type

MS Access ACCDB

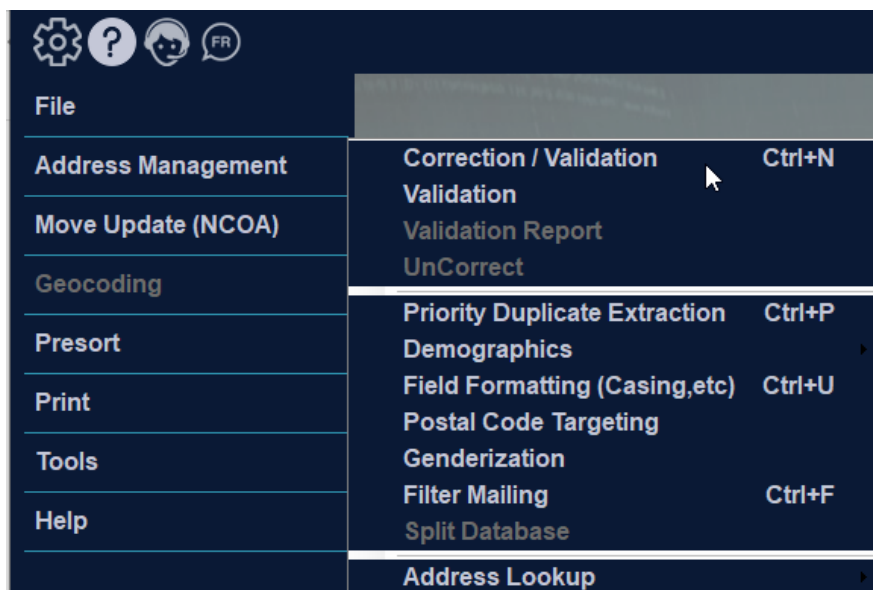
Filename

Browse

Export Close

Address Management

Correction & Validation



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

You are provided with two options in iAddress™:

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

Correction and Validation

Select “Correction/Validation” from the Address Management menu.

Mailing Date

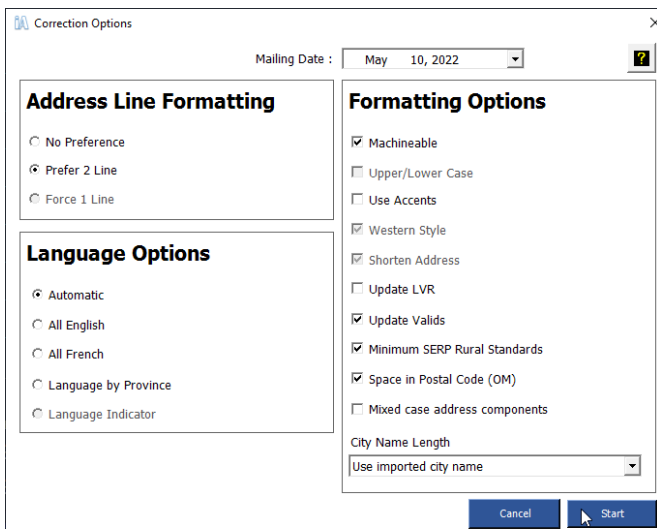
iAddress™ allows you to enter the date you will be mailing your job. It will correct and validate your job against the CPC data valid for that date. If you have chosen a non-valid date, iAddress™ will display an error message.

Language Options

The following options are available for language:

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

Formatting Options



Correction Options

Mailing Date : May 10, 2022

Address Line Formatting

☐ No Preference

☒ Prefer 2 Line

☐ Force 1 Line

Language Options

☒ Automatic

☐ All English

☐ All French

☐ Language by Province

☐ Language Indicator

Formatting Options

☒ Machineable

☐ Upper/Lower Case

☐ Use Accents

☒ Western Style

☒ Shorten Address

☐ Update LVR

☒ Update Valid

☒ Minimum SERP Rural Standards

☒ Space in Postal Code (OM)

☐ Mixed case address components

City Name Length

Use imported city name

Cancel Start

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

- Machineable formats your address to meet the CPC criteria for machineable mail. This option forces the following formatting options.
 - Upper/Lower Case is set to off (Address all Upper Case).
 - Two Line Output is set to off (only a one line address is returned).
 - Use Accents is set to off (no accents returned).
 - Western Style is set to on (address is formatted to western style to increase readability)

- Shorten Address is set to on (street types are abbreviated).
- Upper/Lower Case converts addresses to UPPER and Lower case equivalents.

***Important!

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

Address Line Formatting

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

123 Main Street Apt 1000

Oakville ON 1A2 B3C

becomes

Apt 1000

123 Main Street

Oakville ON 1A2 B3C

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

123 Main Street Apt 1000

Oakville ON 1A2 B3C

become 1000-123 Main Street Oakville ON 1A2 B3C

- Shorten Street converts addresses to the Canada Post approved short forms.
- Update LVR standardizes large volume receiver names in your job. If “Update LVR” is left unchecked, any extra delivery information that is intended to give the mail room clerks more precise delivery information remains in the address instead of being removed upon correction.
- Update Valids replaces a valid address with a formatted valid address. The format is determined by the options you have selected. For example:

55 Trafalgar Court becomes 55 Trafalgar Crt



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

Validation Only

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

To Run Your Job

After selecting all your options, click “OK”.

To cancel your job while it is running, click “Cancel”.

To Undo the Correction

To undo the correction, select “UnCorrect” from the Address Management menu

Priority Duplicate Extraction

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

From the Address Management menu, select “Priority Duplicate Extraction”. Click “Process” to perform the extraction.

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

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

- First Name

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

- Last Name

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

- Name Line (1, 2, 3)

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

- Partial Names

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

- Ignore Rural Addresses

By selecting this option, iAddress™ will not check rural addresses for duplicates.

- Blank and non-blank lines are not duplicate

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

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

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

Percent match

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

Processing duplicates

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

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

Duplicate report

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

To view duplicates



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

Deleting duplicates

Duplicates may be automatically removed using Delete Duplicate Addresses.

Note:

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

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

To run your job

After selecting all your options, click “Process”.

To stop this process while it is running, click “Cancel”.

Using a kill file

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

Setting priorities for duplicates

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

Deduping before correction

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

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

Length

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

File order

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

Language

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

Correct or valid

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

Random

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

Note:

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

Superior record creation

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



Duplicate Extraction

Criteria
Select fields to check for duplicates

☒ Address Line 1	☐ City
☒ Address Line 2	☒ Province
☐ First Name	☐ Postal / ZIP
☐ Last Name	☐ Name Line 1
	☐ Name Line 2
	☐ Name Line 3

Options

Percent Match for Name Fields: %

☒ Partial Names

☒ Ignore Rural Addresses

☐ Blank and non-blank names are not duplicates

☐ Records with all blank names are not part of duplicate processing.

☐ Ignore Address for LVR

☐ Perform Quick Dupe (faster, less extensive)

Duplicates

Common Records

Priority Order
Length

Delete all Duplicate Records?

You are about to delete 43 records, proceed?

Priority Options

- Length
- File Order
- Correct or Valid
- Sequential
- Random

Up

Down

Remove

Priorities Removed

Language

Restore Unit

Restore All

Field Length

- FNAM
- LNAM
- ADD
- ADD2
- CITY
- PROV
- PC

Up

Down

Remove

Fields Removed

Restore Unit

Restore All

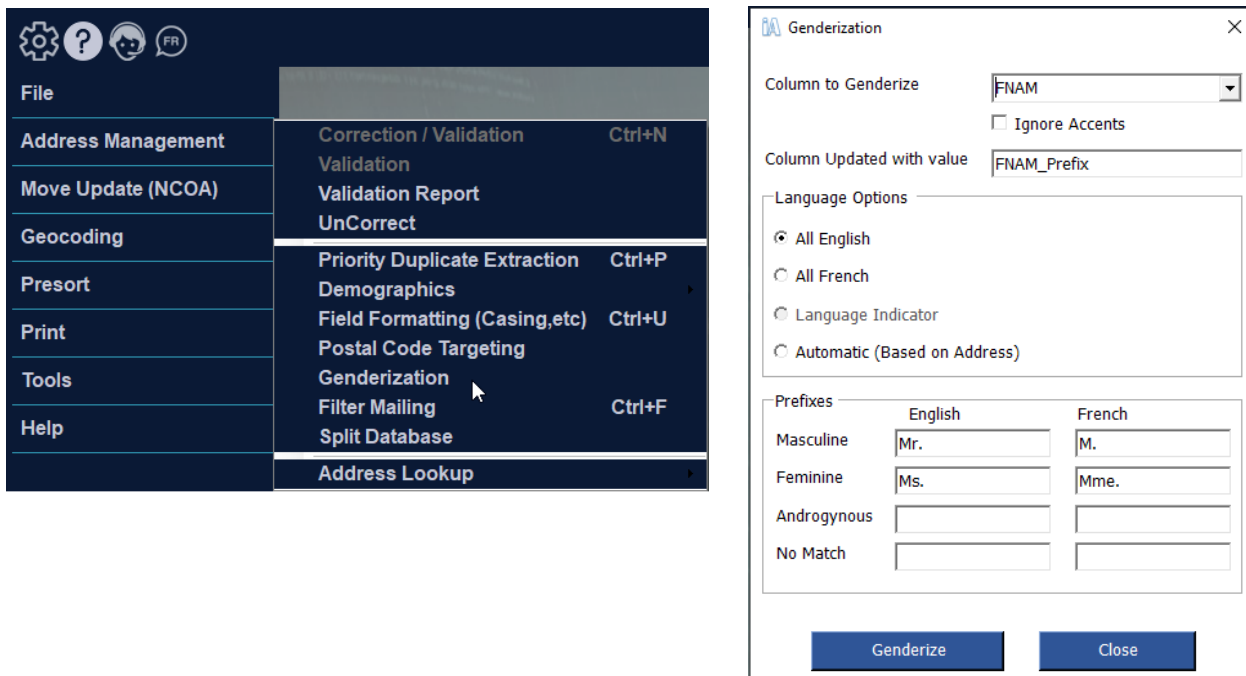
OK

Cancel

Genderization

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

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



Postal Code Targeting

Creating PCT Mailings with iAddress™

PCT mailings include a non-personalized address (i.e. no recipient name). There are 2 ways to create this print file:

- Work with Canada Post's data team. This takes longer but does provide access to a fuller range of demographic data than is available in iAddress™.
- Create the file through the iAddress™ PCT Module in real-time, using the instructions below.

Importing your Target Postal Codes

Select **File>Create Job** and select your input database. You can choose:

- A list of postal codes
- A list of addresses

If you are importing a list of postal codes, you must check the “**Postal Code List**” box on the Select Address screen.

Using a Suppression or Seed List (Optional)

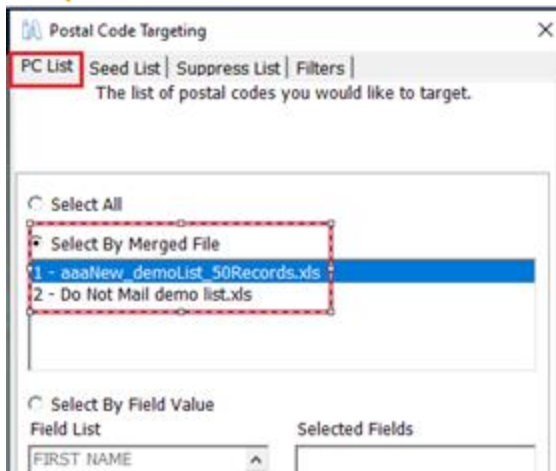
To add these lists, select **File > Merge into Job** for each list. Please note these lists must be full addresses.

Run **Address Management > Correction/Validation** to activate these files in the PCT module.

Creating a PCT List

Select **Address Management > Postal Code Targeting**.

If you have included a suppression and/or seed list, identify the appropriate file on the PC List, Seed List, and Suppress List tabs. On each tab, click **Select By Merged File** and select the correct filename.



Postal Code Targeting

PC List | Seed List | Suppress List | Filters

The list of postal codes you would like to target.

☐ Select All

☒ Select By Merged File

- 1 - aaaNew_demoList_50Records.xls
- 2 - Do Not Mail demo list.xls

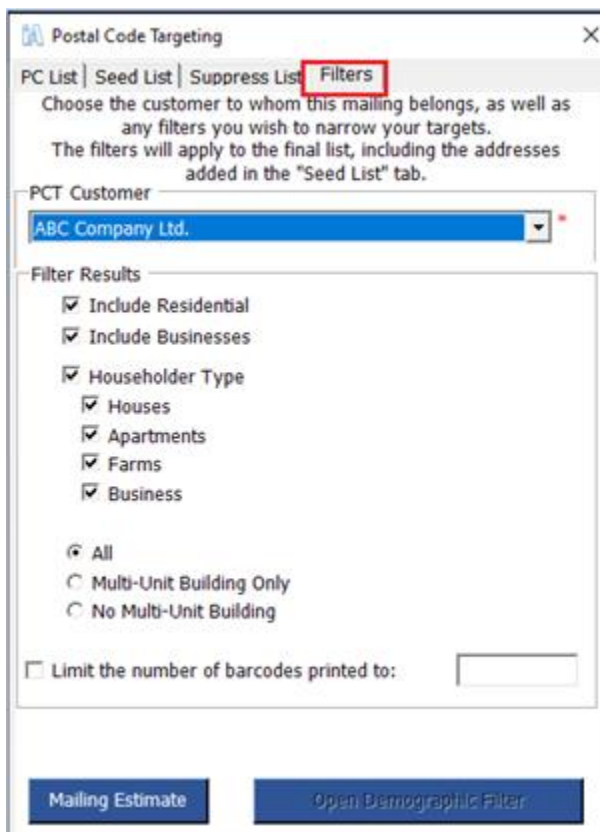
☐ Select By Field Value

Field List: FIRST NAME

Selected Fields:

Click the **Filters** tab and select the following information:

- **MANDATORY:** The customer the PCT mailing is being produced for. This drop-down will include all entries in your iAddress™ customer database.
- **OPTIONAL:** Any inclusions or exclusions you want in the final PCT list.
- **OPTIONAL:** The maximum number of pieces (referred to as barcodes) in the mailing.



Postal Code Targeting

PC List | Seed List | Suppress List | Filters

Choose the customer to whom this mailing belongs, as well as any filters you wish to narrow your targets. The filters will apply to the final list, including the addresses added in the "Seed List" tab.

PCT Customer: ABC Company Ltd.

Filter Results

☒ Include Residential

☒ Include Businesses

☒ Householder Type

- ☒ Houses
- ☒ Apartments
- ☒ Farms
- ☒ Business

☒ All

☐ Multi-Unit Building Only

☐ No Multi-Unit Building

☐ Limit the number of barcodes printed to:

Mailing Estimate

Open Demographic Filter

Click **Mailing Estimate**. A report will be produced with the following information.

- Job name, date, and time

- Total number of pieces created
- Total mailing price
- Statistics on the PCT job

You can make changes to the job by revising your **Filters** criteria and clicking **Mailing Estimate** again.

Creating a PCT Mailing

Once you are satisfied with your PCT job, select an option to continue.

1. Converting your results to a print file:

If you wish to create a Machineable or Special Handling or want to create labels for your PCT mailing, click **Convert to Mailing List**. This will return you to the Select Address screen with the PCT addresses as the input file. You will be warned that the PCT data will overwrite your original input data. Select **Yes** to continue.

Continue to **Presort > Sort** and select the appropriate Postal Code Targeting option.

2. Converting your results to a print file:

If you only want a print file of your PCT results, click **Create Mailing**. A summary report will be produced along with a file of PCT addresses.

Designing and Printing your PCT Mailpiece

Your PCT mailpiece must conform to Canada Post's design specifications for PCT mail including the appropriate indicia. The following links are current at the date of posting.

Smartmail Marketing Customer Guides:

<https://www.canadapost-postescanada.ca/cpc/doc/en/support/customer-guide/smartmail-marketing.pdf>.

<https://www.canadapost-postescanada.ca/scp/doc/fr/soutien/guide-client/guide-de-solutions-marketing-intelliposte.pdf>

Canada Post Postal Indicia Tool:

<https://www.canadapost-postescanada.ca/cpc/en/tools/postal-indicia.page>

<https://www.canadapost-postescanada.ca/scp/fr/outils/vignettes-postales.page>



Field Formatting

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

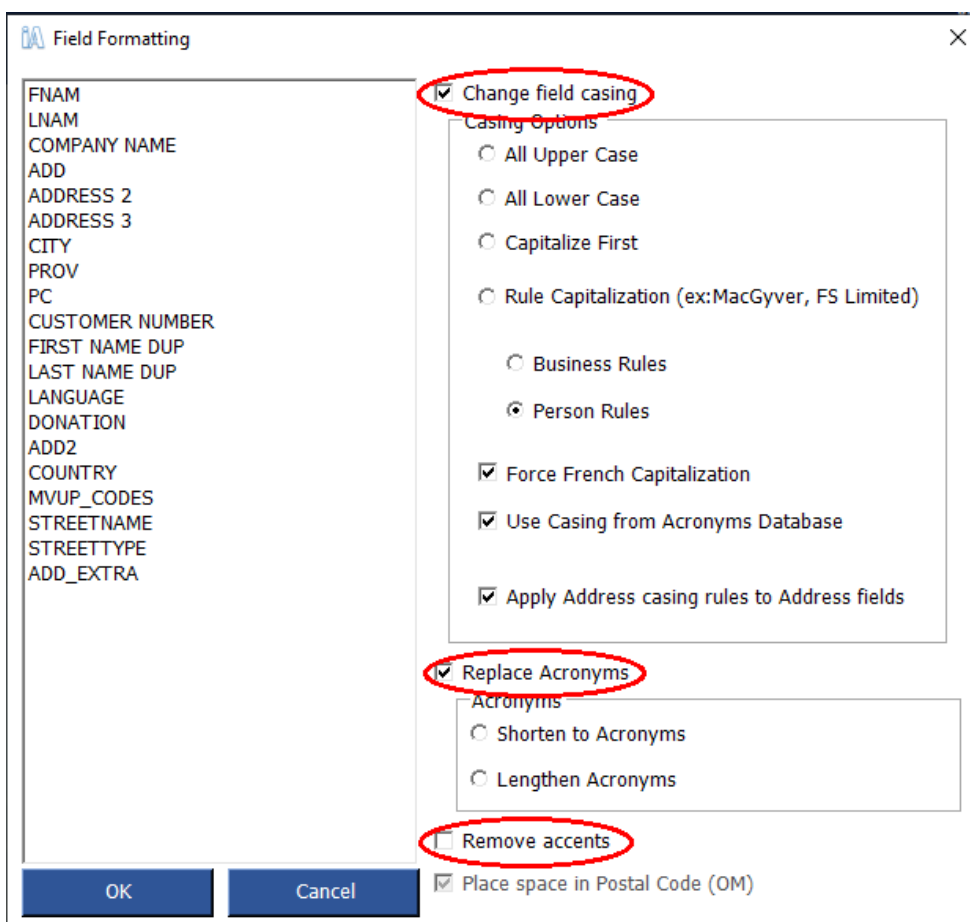
After selecting Filter Mailing, you have several options to choose from. You may choose one of the following tab options:

Demographics:

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

Demographics

You may access the demographic categories through the “Filter Mailing” tab iAddress™. Here you have the option to select demographic categories and sub-categories to filter by and apply to your mailing list.



Address Look-up

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



Type in as much information as you have in the Quick Search fields. Click Correct Address. If you have provided sufficient information, the address will be corrected.

You can also use the buttons “Search Street Name”(Canada Only) or “Search Postal/Zip” to display a range of addresses above the Quick Search fields.

To add a new record to your database, click the radio button labeled Add Record. Once you have entered information into the address and name fields (if displayed), click Address Save.

Using the Drill Down Feature

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

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

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

- You can display or search for General Delivery addresses, PO Boxes or Rural Routes on the “GD/RR/PO Boxes” tab
- Alternative names for city streets are listed under the “Alternate Streets” tab
- (Canada Only) Large volume receivers and their Postal CodesOM are displayed on the “LVRs” tab
- (Canada Only) Alternative city names are displayed on the “Alternate Cities” tab. Some alternative names are not recognized by Canada Post but may be used locally

Look-Up from View Database

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

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

Important!

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

Province

City

TINY
TIVERTON
TOBERMORY
TOLEDO
TORONTO

Select

Streets | GD/RR/PO Boxes | Alternate

Next

CHESTON
CHICORA
CHISHOLM
CHRISTIE
CHUDLEIGH
CHURCH
CHURCHILL
CIBOLA
CITIZENS
CLAREMONT

Street #
(optional) Lookup

Filter Mailing

File	
Address Management	Correction / Validation Ctrl+N
Move Update (NCOA)	Validation
Geocoding	Validation Report
Presort	UnCorrect
Print	Priority Duplicate Extraction Ctrl+P
Tools	Demographics
Help	Field Formatting (Casing,etc) Ctrl+U
	Postal Code Targeting
	Genderization
	Filter Mailing Ctrl+F
	Split Database
	Address Lookup

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

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

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

Filter Mailing

Intelligent Selection
Random Selection
SQL Exclude
Address Filter
Extra Characters
Special Filter
Custom Ex

Enter a number of random records to be selected for this job
The number entered will be the records kept. For example, if you have 500 records and enter 300, 200 will be filtered out randomly.

☐ Filter Only Uncorrectables

Job Info
☐ Filter Seed Records
of Records: 5613
0 records have been filtered

Demographics

You may access the demographic categories through the “Filter Mailing” tab iAddress™. Here you have the option to select demographic categories and sub-categories to filter by and apply to your mailing list.

Here you will be prompted to confirm that you agree to the charges associated with the amount of demographic records listed. You may click yes or no.

A demographics filter report is then generated where you can view all the categories and sub categories you selected along with the amount of records purchased, and other pertinent information.

Intelligent Selection

The screenshot shows the 'Filter Mailing' dialog box with the 'Intelligent Selection' tab selected. The dialog has a title bar with a close button. Below the title bar is a tabbed interface with tabs for 'Intelligent Selection', 'Random Selection', 'SQL Exclude', 'Address Filter', 'Extra Characters', 'Special Filter', and 'Custom Ex'. The 'Intelligent Selection' tab is active, showing four filter categories: 'Filter Province', 'Filter City', 'Filter Address Type', and 'Filter Postal Code'. Each category has a list of options with the number of records in parentheses. The 'Filter Province' list includes AB (1307), BC (525), MB (249), NB (165), NL (95), NS (148), NT (7), ON (1469), PE (16), and QC (1362). The 'Filter City' list includes 100 MILE HOUSE (1), ABBOTSFORD (18), ACADIA VALLEY (1), ACME (1), ACTON (1), ADMIRAL (1), AFTON STATION (1), AGASSIZ (1), AIR RONGE (2), and AIRDRIE (24). The 'Filter Address Type' list includes Unknown (505), Apartment (507), General Delivery (115), LVR (23), Residence (3839), PO Box (574), and Rural Route (50). The 'Filter Postal Code' list includes A0A (7), A0B (5), A0C (5), A0E (1), A0G (4), A0H (4), A0J (2), A0K (8), A0M (3), and A0N (3). A 'Sort By' dropdown is set to 'Alphabetic ASC'. An 'Exclude' button is located below the filter lists. At the bottom, there is a 'Job Info' section with a checkbox for 'Filter Seed Records' (unchecked), the total number of records (5613), and a message stating '0 records have been filtered'. To the right of the 'Job Info' section are five buttons: 'View Filtered', 'Export Filtered', 'Restore', 'Save Filtered', and 'Clear'. A 'Done' button is located at the bottom right.

Filter Mailing

Intelligent Selection Random Selection SQL Exclude Address Filter Extra Characters Special Filter Custom Ex

Sort By Alphabetic ASC

Filter Province

- AB (Records 1307)
- BC (Records 525)
- MB (Records 249)
- NB (Records 165)
- NL (Records 95)
- NS (Records 148)
- NT (Records 7)
- ON (Records 1469)
- PE (Records 16)
- QC (Records 1362)

Filter City

- 100 MILE HOUSE (Records 1)
- ABBOTSFORD (Records 18)
- ACADIA VALLEY (Records 1)
- ACME (Records 1)
- ACTON (Records 1)
- ADMIRAL (Records 1)
- AFTON STATION (Records 1)
- AGASSIZ (Records 1)
- AIR RONGE (Records 2)
- AIRDRIE (Records 24)

Filter Address Type

- Unknown (Records 505)
- Apartment (Records 507)
- General Delivery (Records 115)
- LVR (Records 23)
- Residence (Records 3839)
- PO Box (Records 574)
- Rural Route (Records 50)

Filter Postal Code

- A0A (Records 7)
- A0B (Records 5)
- A0C (Records 5)
- A0E (Records 1)
- A0G (Records 4)
- A0H (Records 4)
- A0J (Records 2)
- A0K (Records 8)
- A0M (Records 3)
- A0N (Records 3)

Exclude

Job Info

☐ Filter Seed Records

of Records: 5613

0 records have been filtered

View Filtered Export Filtered

Restore Save Filtered

Clear Done

Excluding Addresses

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

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

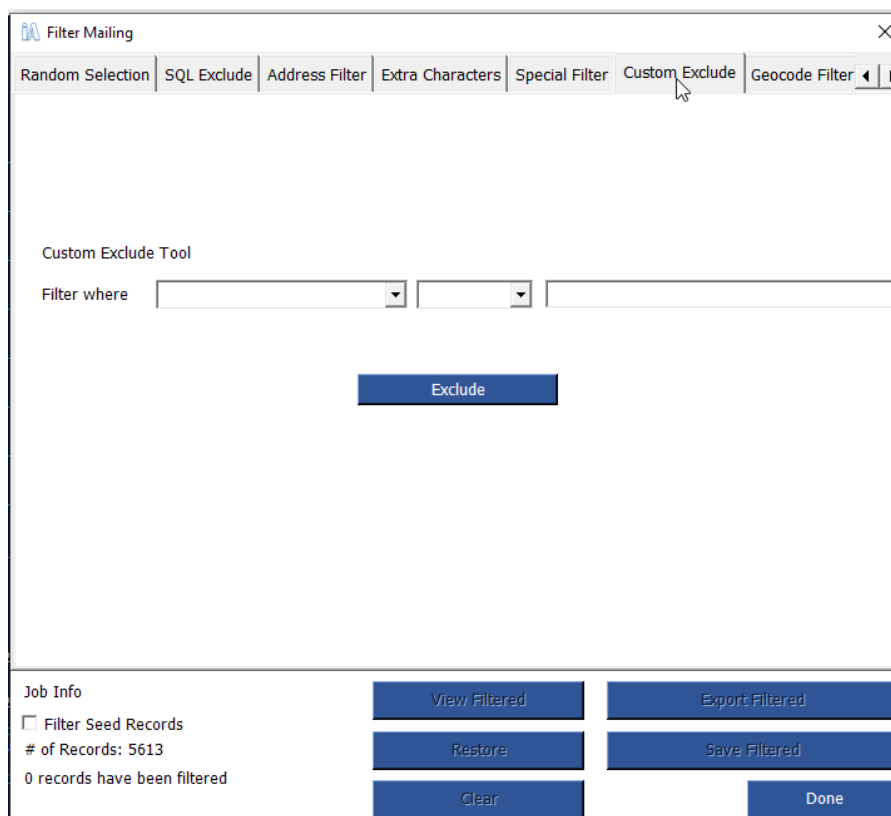
Scroll through the lists to view the options within each criteria. The number of records that match that filter option are listed after each item. In order to exclude more than one item from each criterion, select the first one and click the Exclude button. Select the second item and click the Exclude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

Selecting a Sample Mailing

To prepare a random sample from your database, click on the “Random Selection” tab.

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

Custom Exclude Tool



The screenshot shows a window titled "Filter Mailing" with a close button (X) in the top right corner. The window has a tabbed interface with the following tabs: "Random Selection", "SQL Exclude", "Address Filter", "Extra Characters", "Special Filter", "Custom Exclude" (which is the active tab), and "Geocode Filter". Below the tabs, the "Custom Exclude Tool" section is visible. It contains a "Filter where" label followed by three input fields: a dropdown menu, a second dropdown menu, and a text input field. Below these fields is a blue button labeled "Exclude". At the bottom of the window, there is a "Job Info" section on the left, which includes a checkbox for "Filter Seed Records", the text "# of Records: 5613", and "0 records have been filtered". To the right of the Job Info section are several blue buttons: "View Filtered", "Export Filtered", "Restore", "Save Filtered", "Clear", and "Done".

- Using the Custom Exclude Tool allows you to remove addresses based on very specific criteria from any field within your database. Click on the tab labeled “Custom Exclude Tool”. Select the field you wish to use from the Filter Where drop down.
- The center drop down menu contains the selection operators. Empty fields can be detected using “is null” or non-empty fields with “is not null”. Comparing alphanumeric fields can be done using the “like” operator with wildcard characters. For example “*main st” would select anything that ended in “main st”. For numeric fields, these include such operands as +, -, =, >, <.

SQL Exclude

The screenshot shows the 'Filter Mailing' window with the 'SQL Exclude' tab selected. The interface includes a 'Field List' on the left with fields like ORIGFNAM, FNAM, ORIGNAM, LNAM, COMPANY NAME, ORIGADD, ADD, ADDRESS 2, ADDRESS 3, ORIGCITY, CITY, ORIGPROV, PROV, ORIGPC, PC, CUSTOMER NUMBER, and FIRST NAME DUP. A 'Type in WHERE clause below' text box is provided for entering SQL queries. Below the text box is an 'Exclude' button. At the bottom, there is a 'Job Info' section showing '# of Records: 5613' and '0 records have been filtered', along with buttons for 'View Filtered', 'Export Filtered', 'Restore', 'Save Filtered', 'Clear', and 'Done'.

Filter Mailing

Random Selection | **SQL Exclude** | Address Filter | Extra Characters | Special Filter | Custom Exclude | Geocode Filter

Expert Exclude Tool

Enter an SQL WHERE clause into the box for an expert exclude.
SQL Operators [=, <, >, <>, is null, not, and, or]
Text Example = 'Text' Number Example = 123 Wildcard = * (only with like operator)

Field List

Type in WHERE clause below [ex. FNAM='John' and LANG='E']

ORIGFNAM
FNAM
ORIGNAM
LNAM
COMPANY NAME
ORIGADD
ADD
ADDRESS 2
ADDRESS 3
ORIGCITY
CITY
ORIGPROV
PROV
ORIGPC
PC
CUSTOMER NUMBER
FIRST NAME DUP

Exclude

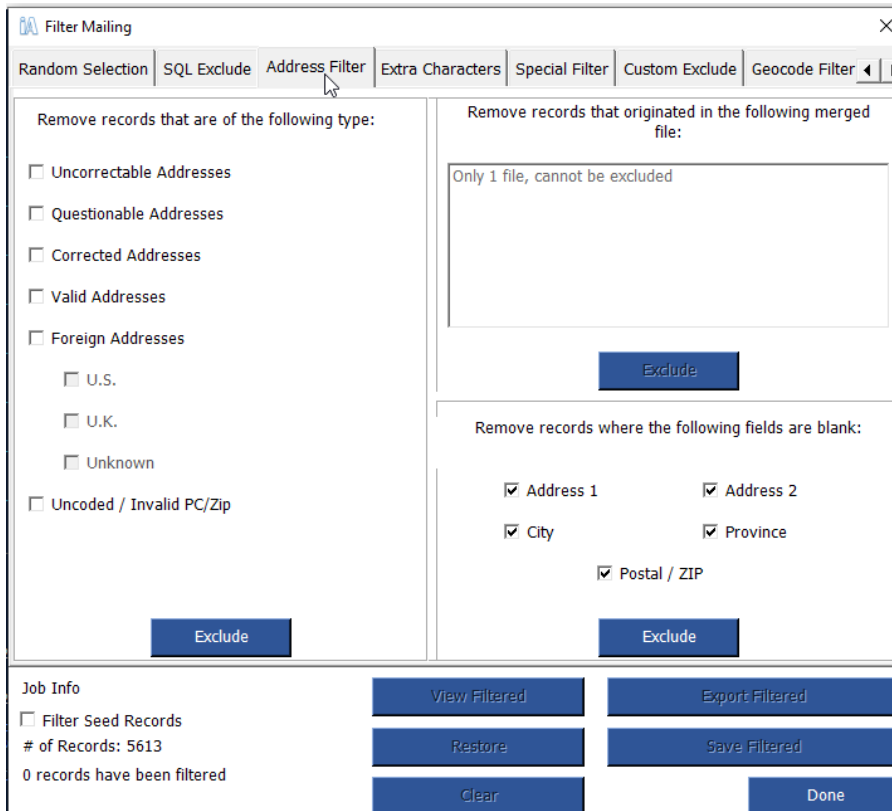
Job Info

☐ Filter Seed Records
of Records: 5613
0 records have been filtered

View Filtered | Export Filtered
Restore | Save Filtered
Clear | Done

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

Address Filter



The screenshot shows the 'Filter Mailing' application window with the 'Address Filter' tab selected. The interface is divided into three main sections: a left sidebar for record types, a top right for merged files, and a bottom right for blank fields. Each section has an 'Exclude' button. The bottom left contains job information and a list of action buttons.

Filter Mailing [X]

Random Selection | SQL Exclude | **Address Filter** | Extra Characters | Special Filter | Custom Exclude | Geocode Filter

Remove records that are of the following type:

- ☐ Uncorrectable Addresses
- ☐ Questionable Addresses
- ☐ Corrected Addresses
- ☐ Valid Addresses
- ☐ Foreign Addresses
 - ☐ U.S.
 - ☐ U.K.
 - ☐ Unknown
- ☐ Uncoded / Invalid PC/Zip

Exclude

Remove records that originated in the following merged file:

Only 1 file, cannot be excluded

Exclude

Remove records where the following fields are blank:

- ☒ Address 1
- ☒ Address 2
- ☒ City
- ☒ Province
- ☒ Postal / ZIP

Exclude

Job Info

☐ Filter Seed Records
of Records: 5613
0 records have been filtered

View Filtered **Export Filtered**
Restore **Save Filtered**
Clear **Done**

Address Filter tab has three specific functions.

Select Records

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

- Uncorrectable
- Questionable
- Corrected
- Valid
- Foreign
- Uncoded

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

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

Extra Characters

The screenshot shows the 'Filter Mailing' dialog box with the 'Extra Characters' tab selected. The dialog has a title bar with a close button (X). Below the title bar is a tabbed interface with tabs: 'Random Selection', 'SQL Exclude', 'Address Filter', 'Extra Characters' (active), 'Special Filter', 'Custom Exclude', and 'Geocode Filter'. The 'Extra Characters' tab contains a list of fields on the left and a list of character types on the right. The fields list includes: FNAM, LNAM, COMPANY NAME, ADD, ADDRESS 2, ADDRESS 3, CITY, PROV, PC, CUSTOMER NUMBER, FIRST NAME DUP, LAST NAME DUP, LANGUAGE, DONATION, ADD2, COUNTRY, NCOA, DNM_CODES, MVUP_CODES, FLG_GEOLAT, FLG_GEOLONG, FLG_NEARESTPC, FLG_DISTANCE, and FLG_TIMEZONE. The character types list includes: Windows New Line, Line Feed, Tab, Form Feed, Carriage Return, Non Breaking Spaces, Double Space, and Non-visible control characters. Each character type has a checkbox, and all are checked except for 'Double Space' and 'Non-visible control characters'. A 'Replace' button is at the bottom of the list. Below the list is a 'Job Info' section with a checkbox for 'Filter Seed Records' (unchecked), the text '# of Records: 5613', and '0 records have been filtered'. To the right of the 'Job Info' section are six buttons: 'View Filtered', 'Export Filtered', 'Restore', 'Save Filtered', 'Clear', and 'Done'.

Field	Character Type	Selected
FNAM	Windows New Line	☒
LNAM	Line Feed	☒
COMPANY NAME	Tab	☒
ADD	Form Feed	☒
ADDRESS 2	Carriage Return	☒
ADDRESS 3	Non Breaking Spaces	☒
CITY	Double Space	☐
PROV	Non-visible control characters	☐
PC		
CUSTOMER NUMBER		
FIRST NAME DUP		
LAST NAME DUP		
LANGUAGE		
DONATION		
ADD2		
COUNTRY		
NCOA		
DNM_CODES		
MVUP_CODES		
FLG_GEOLAT		
FLG_GEOLONG		
FLG_NEARESTPC		
FLG_DISTANCE		
FLG_TIMEZONE		

Replace

Job Info

☐ Filter Seed Records

of Records: 5613

0 records have been filtered

View Filtered

Export Filtered

Restore

Save Filtered

Clear

Done

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

Geocode Filter (Canada Only)

Filter Mailing

SQL Exclude
Address Filter
Extra Characters
Special Filter
Custom Exclude
Geocode Filter
Demographics

Filter by Distance

Closier than:
Farther than:

Km
Km

Filter by Pieces

Number of Pieces:

Farthest
Closest

☐ Filter Non-Geocoded Addresses

Exclude

Job Info
☐ Filter Seed Records
of Records: 5613
0 records have been filtered

View Filtered
Export Filtered
Restore
Save Filtered
Clear
Done

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

Important!

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

After Filtering

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

View

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

Restore

Clicking on the “Restore” button will remove all your filters, and restore all the filtered records to the job. This only works if you have not cleared the filtered records using the “Clear” button.

Clear

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

Exporting Records

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

Saving Records

If you wish to have your filtered records split to a separate iAddress™ job, select “Save Filtered” button and choose a name for your new job.

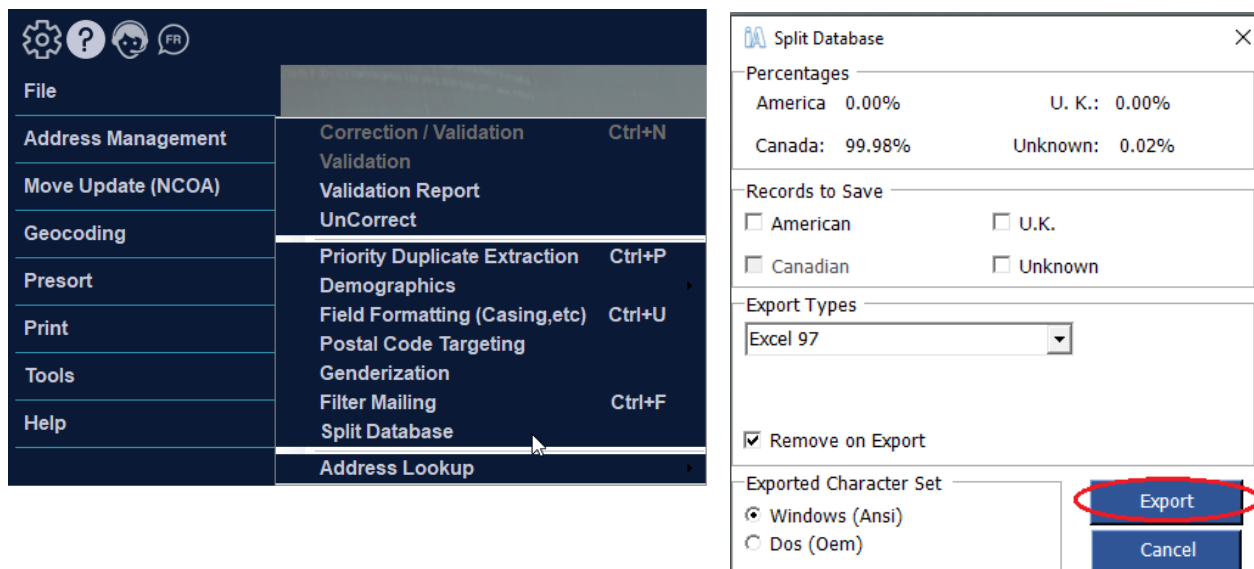
Restoring Records

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

Split Database

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

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





Demographics

You may append demographic data to your job file by clicking on “Append Demographic Data” under the demographics tab in the iAddress™ file menu. This function will generate fields in the database with your results for append. You may choose your 3 categories and sub-categories and process the data for append.

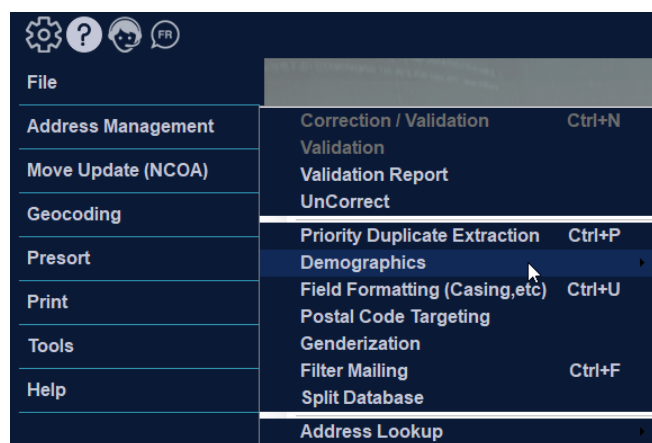
A demographics append report will be generated listing all the categories and sub-categories you have chosen.

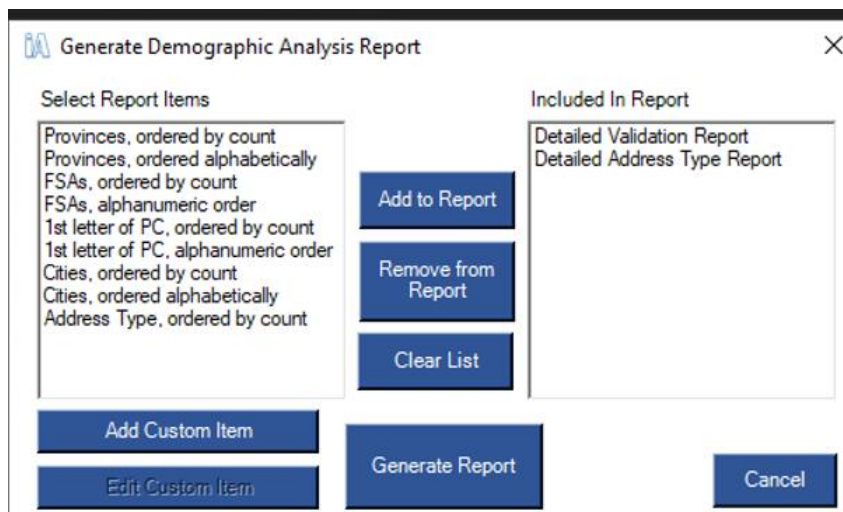
You may click on “View Records” to see the new categories which have been created in your database with the additional demographic data. The Demographic analysis tab will give you the opportunity to view and print a variety of reports.

Selecting the Demographic Analysis option on the Address Management menu displays information on your job by province, address type, FSAOM and city. After running correction/validation on your job and selecting Demographic Analysis, you may select which items you wish to see in your report by using the “Add to Report” and “Remove from Report” buttons. Click “Generate Report” to create the report. The report will appear, and you have the option to save, print, set-up a printer or cancel out of the report preview.

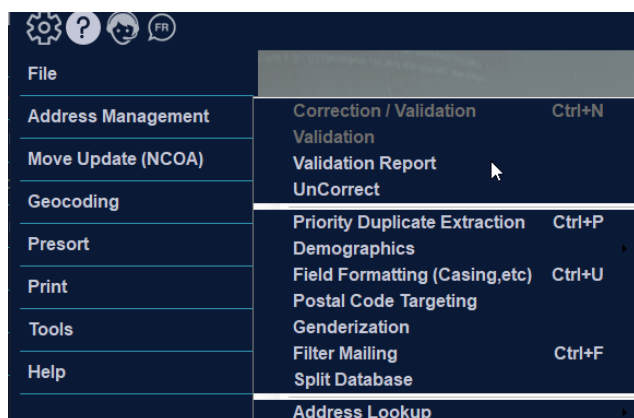
If you are curious to know the status of your demographic account, you may click on “Demographic Account Status” and you will see a screen pop up which will outline the amount of records you have left and the status of your subscription.

If you would like to order demographic records, then you may do so by clicking on “Demographic Order Form”. A form will appear and will outline the associated costs with records. You may fill in your information and submit the order form.





Validation Report/SOA



The Validation Report provides information on the accuracy of your data. It lists the total number of records as well as the number of records that are valid, corrected and uncorrectable (unable to be corrected). After correcting your addresses, choose “Validation Report” from the Address Management menu.

Mailing Accuracy Levels

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

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

- view corrected addresses
- view uncorrectable addresses
- filter corrections



- print the validation report
- save to file

View Corrected Addresses

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

View Uncorrectable Addresses

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

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

Filter Record

You can choose the record by correction type. For further information see the “Selecting Records” section of the Manual.

Important!

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

Print Validation Report for Canada Post

Validation Report

Validation Report | Corrected Report | Uncorrectable Report

Job Name:Test File 1

Software & Version Number:iAddress Version 2.01.4

Customer Name:ABC Company

Customer Address:1-2 Vata Court
Aurora ON L4G 4B6

Customer Telephone Number:

Customer Number:7654321

Mailed on Behalf Of:Carolyn Test

Customer Number:1234567

Date of Mailing Selected:2022-05-04

Expiry Date of Delivery Mode Data CD:2022-05-12

Serial Number of Delivery Mode Data CD:F3102025561101

Options:Upper Case

Print Validation Report

Save to File

Customer Information

Customer Name (Your Company Name)

ABC Company

Mailing on Behalf Of

View Corrected Addresses

View Uncorrectable Addresses

Filter Records by Correction Type

Print All

Save All

Close

☐ Do NOT display this window after the correction completes.

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

Corrected Report

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

Uncorrectable Report

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



Address Look-Up

The results are based on address ranges and should not be used to validate the existence of individual addresses.

Quick Search		3205 TURNBERRY RD		Suggest	Address UnCorrectable	☒ Auto Search
Address1		Search Street Name	Address Save	Previous	Next	Province
Address2		Search Postal / ZIP	Delete record	Clear		City
City	BURLINGTON	Revert to Import		Correction Options		
Province	ON	Possible Problem	Civic number	☒ LookUp		Select
Postal / ZIP	L7M 4J4	Comment		☐ Add Record		
Longitude		Status	UnCorrectable	Next		
Latitude		Lookup				

Search Results

Street # (optional)

Making Manual Corrections

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

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

Address Look-Up

The results are based on address ranges and should not be used to validate the existence of individual addresses.

Quick Search

Address1: 3205 TURNBERRY RD

Address2:

City: BURLINGTON

Province: ON

Postal / ZIP: L7M 4J4

Longitude:

Latitude:

☒ Signed Degrees

☐ Unsigned Degrees

Possible Problem: Civic number

Comment:

Status: UnCorrectable

☒ Auto Search

Address UnCorrectable

Search Street Name

Search Postal / ZIP

Address Save

Delete record

Revert to Import

Correction Options

Edit Record

Add Record

Province: ONTARIO

City: TORONTO

TINY

TIVERTON

TOBERMORY

TOLEDO

TORONTO

Select

Streets | GD/RR/PO Boxes | Alternate

AINSWORTH

Next

AFTON

AGNES

AINSWORTH

AITKEN

ALBANY

ALBEMARLE

ALBERT FRANK

ALBERTA

ALBERTUS

ALCINA

Street # (optional)

Lookup

Search Results

	Street #	Suite #	Name	City	Postal	Other
▶	35 to 35 Odd		AINSWORTH RD	TORONTO	M4K0A7	
	40 to 40 Even		AINSWORTH RD	TORONTO	M4K3Y8	
*						

Postal Code Targeting

Creating PCT Mailings with iAddress™

PCT mailings include a non-personalized address (i.e. no recipient name). There are 2 ways to create this print file:

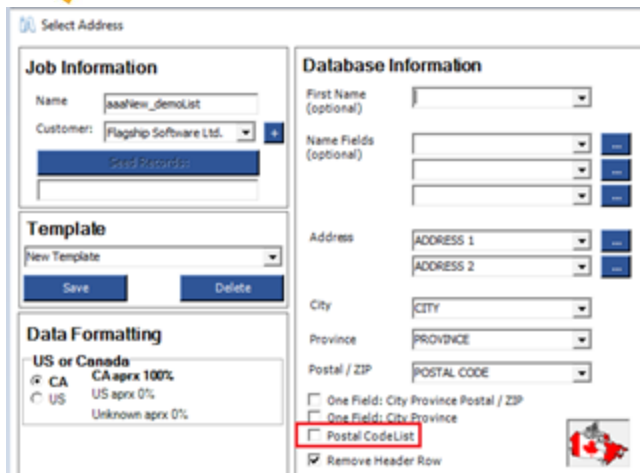
- Work with Canada Post's data team. This takes longer but does provide access to a fuller range of demographic data than is available in iAddress™.
- Create the file through the iAddress™ PCT Module in real-time, using the instructions below.

Importing your Target Postal Codes

Select **File>Create Job** and select your input database. You can choose:

- A list of postal codes
- A list of addresses

If you are importing a list of postal codes, you must check the **"Postal Code List"** box on the Select Address screen.



Using a Suppression or Seed List (Optional)

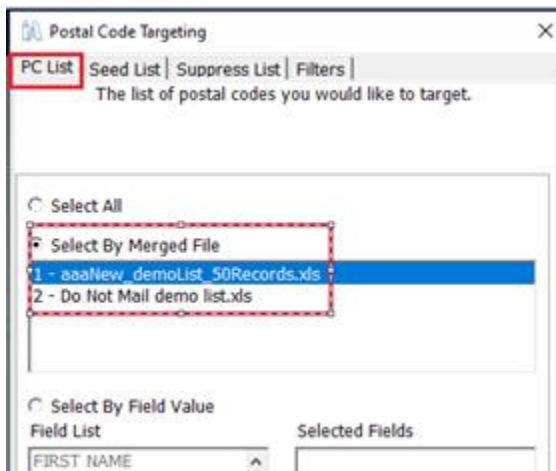
To add these lists, select **File > Merge into Job** for each list. Please note these lists must be full addresses.

Run **Address Management > Correction/Validation** to activate these files in the PCT module.

Creating a PCT List

Select **Address Management > Postal Code Targeting**.

If you have included a suppression and/or seed list, identify the appropriate file on the PC List, Seed List, and Suppress List tabs. On each tab, click **Select By Merged File** and select the correct filename.



Click the **Filters** tab and select the following information:

- **MANDATORY:** The customer the PCT mailing is being produced for. This drop-down will include all entries in your iAddress™ customer database.
- **OPTIONAL:** Any inclusions or exclusions you want in the final PCT list.

- OPTIONAL: The maximum number of pieces (referred to as barcodes) in the mailing.

Click **Mailing Estimate**. A report will be produced with the following information.

- Job name, date, and time
- Total number of pieces created
- Total mailing price
- Statistics on the PCT job

You can make changes to the job by revising your **Filters** criteria and clicking **Mailing Estimate** again.

Creating a PCT Mailing

Once you are satisfied with your PCT job, select an option to continue.

1. Converting your results to a print file:

If you wish to create a Machineable or Special Handling or want to create labels for your PCT mailing, click **Convert to Mailing List**. This will return you to the Select Address screen with the PCT addresses as the input file. You will be warned that the PCT data will overwrite your original input data. Select **Yes** to continue.

Continue to **Presort > Sort** and select the appropriate Postal Code Targeting option.



2. Converting your results to a print file:

If you only want a print file of your PCT results, click **Create Mailing**. A summary report will be produced along with a file of PCT addresses.

2. **Designing and Printing your PCT Mailpiece**

Your PCT mailpiece must conform to Canada Post's design specifications for PCT mail including the appropriate indicia. The following links are current at the date of posting.

Smartmail Marketing Customer Guides:

<https://www.canadapost-postescanada.ca/cpc/doc/en/support/customer-guide/smartmail-marketing.pdf>.

<https://www.canadapost-postescanada.ca/scp/doc/fr/soutien/guide-client/guide-de-solutions-marketing-intelliposte.pdf>

Canada Post Postal Indicia Tool:

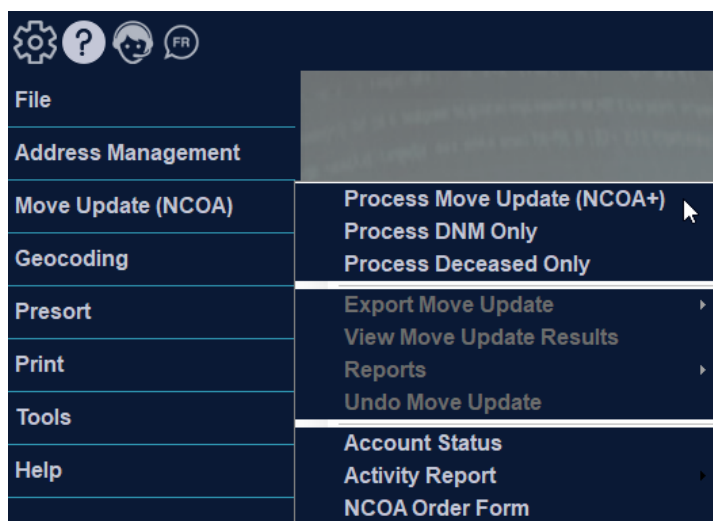
<https://www.canadapost-postescanada.ca/cpc/en/tools/postal-indicia.page>

<https://www.canadapost-postescanada.ca/scp/fr/outils/vignettes-postales.page>

NCOA – Update Moves In Your Data

NCOA (National Change of Address)

To start an NCOA job, select “Process Move Update” from the Move Update tab on the main menu.



Selecting Fields

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

Job Wizard - Move Update

	ORIGFNAM	FNAM	ORIGLNAM
▶	TIMOTHY ED...	TIMOTHY ED...	SIMON
	CECILE	CECILE	AUDETTE
	LINDSAY J	LINDSAY J	THOMAS
	LEONA	LEONA	GLENNON

Select the fields which contain the name information

☒ Separate Name Fields ☐ Combined Name Fields

First Name:

Middle Name:

Last Name:

Name Suffix:

Company Name:

Next > Cancel

- **Separate Name Fields/Combined Name Fields:** You can choose to have your name fields combined or separate. For example:

Separate Name Fields: “Todd” “Martin”

Todd is the first name and Martin is the second.

Combined Name Fields: “Todd Martin”

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

- **Company Name:** If you have a company name in your database, use the drop down to select it here.



NCOA Job Settings

Job Wizard - Move Update

Select how iAddress should handle the results from the move update

Job Name
List1

End User
ABC Company

NCOA Matching

☐ Apply Matches ☐ Purge Nixies

Additional Move Update Services

☐ Run Deceased ☐ Purge Deceased

☐ Run DNM ☐ Purge DNM

☒ Match First And Last Name
☐ Match Last Name Only
☐ Match Address Only

☐ Run In Secure Mode

< Back Process Cancel

- **Job Name:** This is the name that will appear on detailed reports to help identify different NCOA runs.
- **End User:** To run NCOA an end user terms of use ID must be used. Select from this list the customer record whose ID you wish to use for this NCOA run.
- **Apply Matches / Purge Nixies:** Checking these options will cause the matches to be applied and nixies to be purged automatically after the NCOA run.
- **Run DNM:** If you choose to run DNM, the addresses in your database will be verified against the national Do Not Mail List.
- **Match First and Last Name** – Match against the DNM database using first and last name as well as the address. (Preferred)
- **Match Last Name Only** – Match against the DNM database using only the last name as well as the address.
- **Match Address Only** – Match against the DNM database using only the address.
- **Purge DNM**

- After processing your NCOA job, having this box checked will cause all the matched DNM records to be purged automatically.
- Run In Secure Mode
- The option will cause the data to be encrypted during the transfer to the NCOA server.

Click Process to start your NCOA job.

Running your Job

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

Important!

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

Important!

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

View/Apply NCOA Results

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

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

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

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

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



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

Exporting NCOA Audit Table

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

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

Activity Reports

Currently there are four types of activity reports available (Summary, 1, 3 or 12 month report details). Click on the report you wish to have displayed. This report will show the job dates, number of records processed, and the number of matched and nixie record.

PLACE HOLDER – NCOA User Guide and Terms of Service from CPC

This entire section on the website is PDF's – wondering if we have originals?

Presort of data for mailing

Sort

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

Select the mailing date of the sortation.

Mailing Date: 6/15/2022
You must deposit your mail On Or after 5/13/2022.

Template: New Template [Delete]
Customer: Flagship Software
Client Info.:
Tax Rate: 0 Reference:

Addresses Included in Sort
☒ Uncorrectable ☒ Retired Postal Code

Select the type of sortation for this job

- ☒ Personalized Mail (SH) (Formerly Addressed Admail)
- ☐ Personalized Mail Machineable
- ☐ Personalized Mail Machineable Labels Only
- ☐ Publication Mail (SH) (Formerly LCP)
- ☐ Publication Delivery Facility Presort (Formerly NDG)
- ☐ Publication Mail Machineable
- ☐ Incentive Lettermail Machineable
- ☐ Incentive Lettermail Machineable Labels Only
- ☐ Postal Code Targeting (SH)
- ☐ Postal Code Targeting Machineable

< Back Next > Done Cancel

Select the office of deposit of your mailing.

Office of Deposit: CALGARY AB
Office of Deposit Postal Code: T2E0A0
Office of Deposit Site Number: I066
[List]

Choose the filename for your mailing plan and printing options.

☐ Mailing Plan File
[Browse]

Labels
DO NOTHING [Options]
Not printing or saving labels
Prefix files with: (optional)

Reports
DO NOTHING [Options]
Not printing or saving reports
Prefix files with: (optional)

[Save template]

< Back Next > Done Cancel



When all information has been correctly entered, click “Process”.

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

Palletization/ Monotainers/ Brick Piling

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

Resort a Job

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

Statement of Mailing

A screenshot of the 'Statement of Mailing Summary' window in a software application. The window has a title bar and standard window controls. It is divided into several sections. The top section, 'Customer Information', contains fields for 'Customer Name (Your Company Name)' (Flagship Software), 'Mailing on Behalf Of' (a dropdown menu), 'Office of Deposit' (CALGARY AB), 'Customer Number (Your number)' ((123) 456-7890), 'Customer's CPC Number' (1234567), and 'Tax' (0 %). Below this is a checkbox labeled 'Do not display this window after the sortation completes'. The main section, 'Statement of Mailing', displays a list of job details in a text-based format. To the right of this section are several buttons: 'View Uncoded', 'Delete Uncoded', 'Print', 'Print All Reports', 'Save to File', and 'Close'.

Customer Information	
Customer Name (Your Company Name)	Flagship Software
Mailing on Behalf Of	[Dropdown]
Office of Deposit	CALGARY AB
Customer Number (Your number)	(123) 456-7890
Customer's CPC Number	1234567
Tax	0 %

☐ Do not display this window after the sortation completes

Statement of Mailing

Job Name: Test File 1
Input File: 2.mdb

Customer Name : Flagship Software
Customer Address : 2 vata crt
Customer Telephone Number : (123) 456-7890
Customer Number : 1234567
Mailed on Behalf Of : Flagship Software
Customer Number : 1234567

Software & Version Number : iAddress - SERP Recognized
SERP Expiry Date : 2023-01-08
Database Valid From : 2022-05-13 To 2022-06-16
Delivery Mode Audit Code : F
Serial Number of Delivery Mode Data CD : F3102025561101
Office of Deposit : CALGARY AB
Date of Mailing : 2022-06-15
Run Date of Mailing Summary : 2022-05-06 13:54:33

Mailing Plan ID : EST_E506159923
Mailing Type : Personalized Mail SH
Piece Type : STANDARD
Container Type : LetterFlatliner

Buttons: View Uncoded, Delete Uncoded, Print, Print All Reports, Save to File, Close

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

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



Postal Monotainers used for large volumes of mail

Uncoded Pieces – Addressed Admail and Publications Mail

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

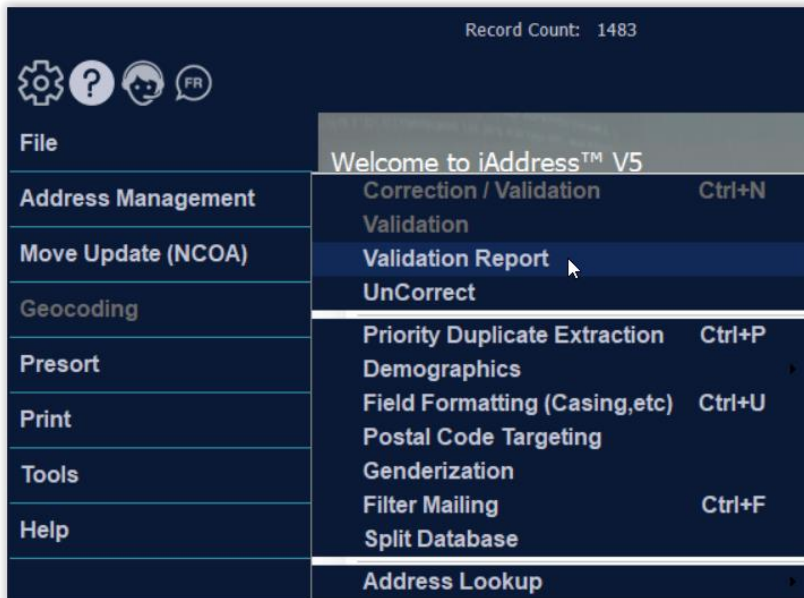
Uncoded Pieces – Transactional Mail

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



Validation Report

The validation report can be found under the address management tab. Click on 'Validation Report' and it will pop up. The report contains the corrected and uncorrectable report as well. Here you may choose to view, print or download the reports.



Validation Report

Validation Report | Corrected Report | Uncorrectable Report

Job Name: Test File 1

Software & Version Number: iAddress Version 2.01.4

Customer Name: ABC Company

Customer Address: 1-2 Vata Court
Aurora ON L4G 4B6

Customer Telephone Number:

Customer Number: 7654321

Mailed on Behalf Of: Carolyn Test

Customer Number: 1234567

Date of Mailing Selected: 2022-05-04

Expiry Date of Delivery Mode Data CD: 2022-05-12

Serial Number of Delivery Mode Data CD: P3102025561101

Options: Upper Case

Print Validation Report

Save to File

Customer Information

Customer Name (Your Company Name)
ABC Company

Mailing on Behalf Of

View Corrected Addresses

View Uncorrectable Addresses

Filter Records by Correction Type

Print All

Save All

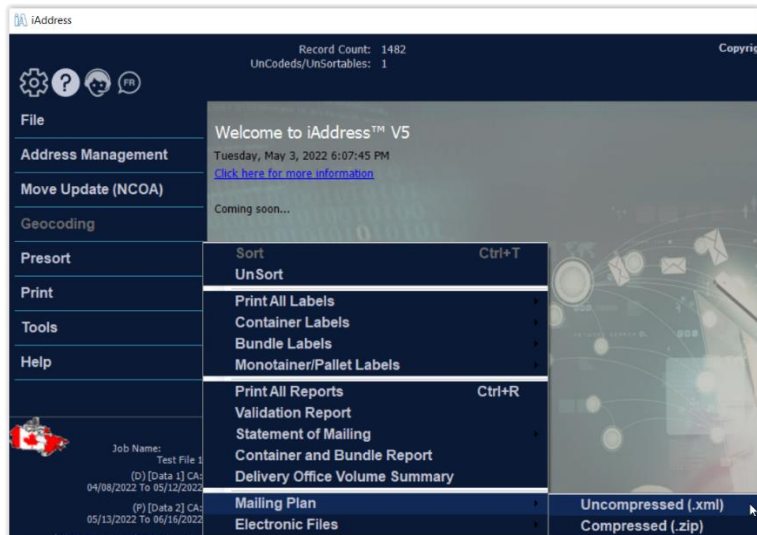
Close

☐ Do NOT display this window after the correction completes.

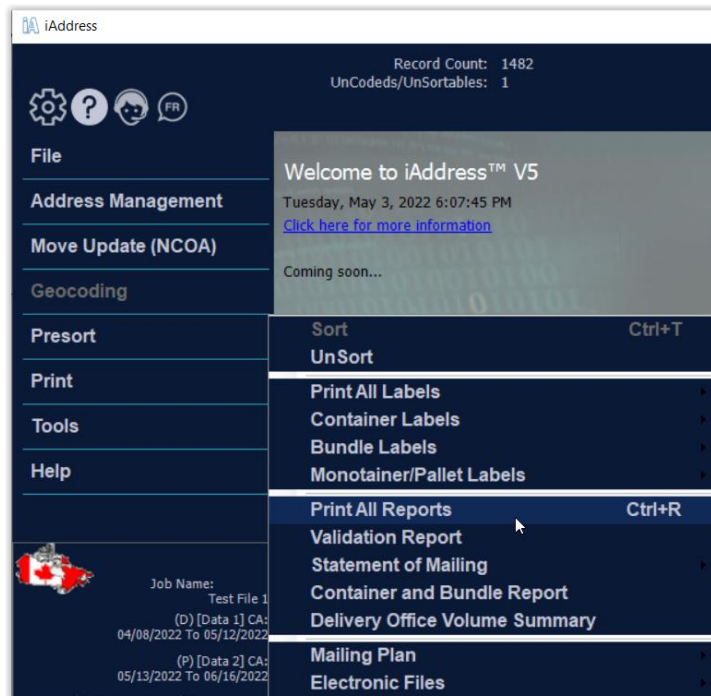
Mailing Plan

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

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



Print Reports



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

Selecting the Print All Reports option will produce the Statement of Mailing, Container/Bag and Bundle Report, as well as the Delivery Office Volume Summary. These reports can also be printed



individually, by selecting the appropriate report from the Presort menu. The Validation Report is included on this screen should you wish to print or reprint this report.

Statement of Mailing

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

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

Statement of Mailing

Statement of Mailing Summary

Customer Information

Customer Name (Your Company Name) : Flagship Software

Mailing on Behalf Of : Office of Deposit

Customer Number (Your number) : (123) 456-7890

Customer's CPC Number : 1234567

Tax : 0 %

☐ Do not display this window after the sortation completes

Statement of Mailing

Job Name: Test File 1

Input File: 2.mdb

Customer Name : Flagship Software

Customer Address : 2 veta crt

Customer Telephone Number : (123) 456-7890

Customer Number : 1234567

Mailed on Behalf Of : Flagship Software

Customer Number : 1234567

Software & Version Number : iAddress - SERP Recognized

SERP Expiry Date : 2023-01-08

Database Valid From : 2022-05-13 To 2022-06-16

Delivery Mode Audit Code : P

Serial Number of Delivery Mode Data CD : F3102025561101

Office of Deposit : CALGARY AB

Date of Mailing : 2022-06-15

Run Date of Mailing Summary : 2022-05-06 13:54:33

Mailing Plan ID : EST_E506159923

Mailing Type : Personalized Mail SH

Piece Type : STANDARD

Container Type : LetterFlatliner

View Uncoded

Delete Uncoded

Print

Print All Reports

Save to File

Close

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

The Container/Bag and Bundle Report

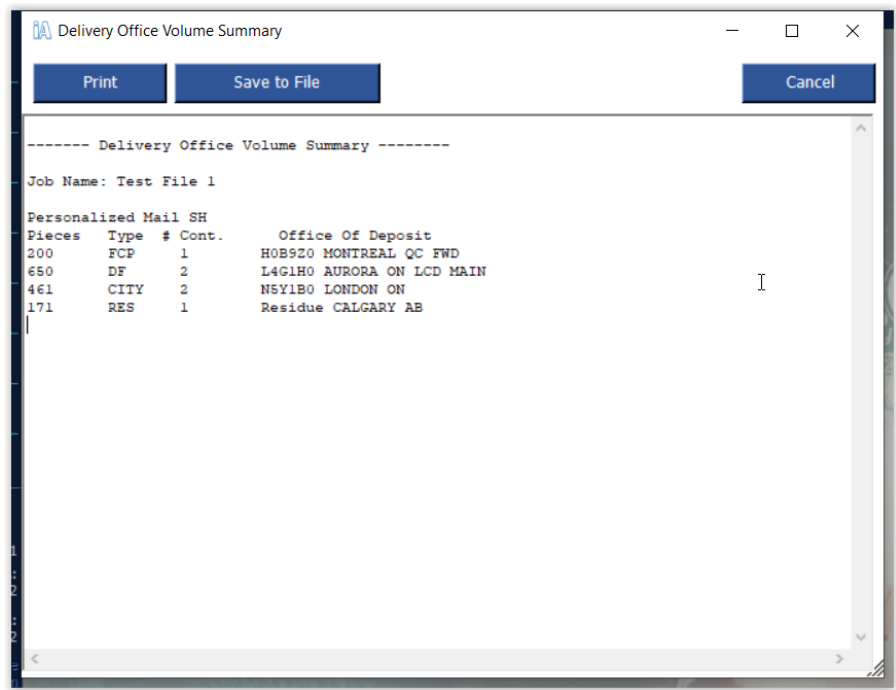
The Container/Bag and Bundle Report contains information about each container, bag or bundle, and its contents. You can access this report from the Presort menu.

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

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

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

Office Volume Summary



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

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

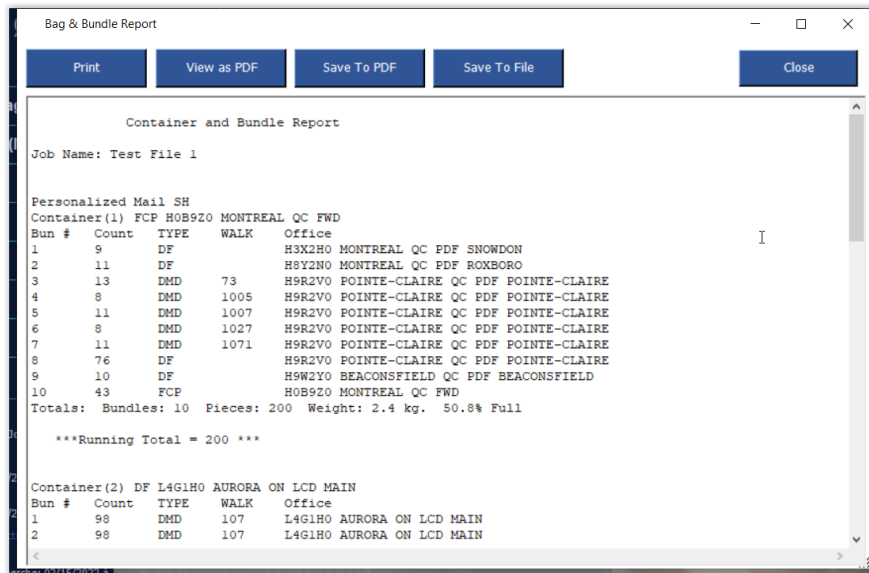
Selecting the Print All Reports option will produce the Statement of Mailing, Container/Bag and Bundle Report, as well as the Delivery Office Volume Summary. These reports can also be printed individually, by selecting the appropriate report from the Presort menu. The Validation Report is included on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

Statement of Mailing (SOM)

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

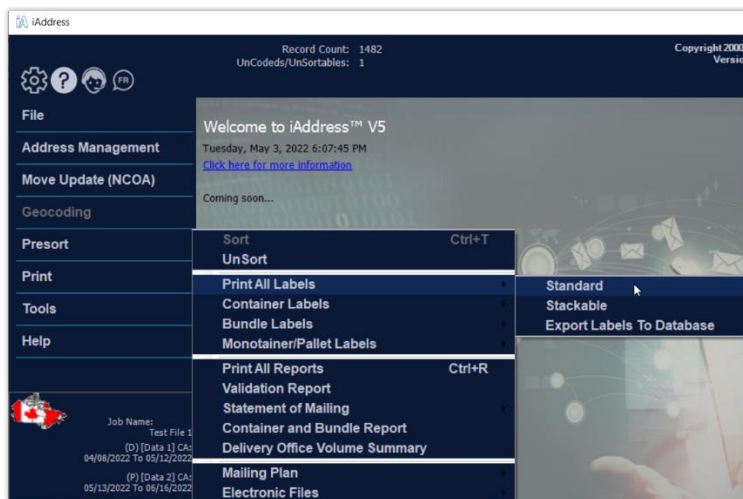


The Container/Bag and Bundle Report



The Container/Bag and Bundle Report contains information about each container, bag or bundle, and its contents. You can access this report from the Presort menu. Print the report by clicking the Print button or save the report to a text file. Some Canada Post RVUs require this report. Please check with your local RVU (Office of Deposit) for its reporting requirements. To print this report for your records, click “Print”.

Print Labels



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

Print All Labels

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

Container/Bag Labels

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

Bundle Labels

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

Monotainer/ Pallet Labels

You can view and print your Monotainer/Pallet labels in PDF using this option. A sample monotainer label appears below (see photo of monotainers above if you are not familiar with them).

