Using Shelby Bulk Mailer to send bulk mail!
In Membership go to Reports>Selections & Listings
To begin Create a New Report

Shelby Selections and Listings -- Started from Membership

Company: First Church In The City

Applications: Membership/Misc. Names/Prospects
Report Group: Glynda's Reports
Find reports beginning with:

<table>
<thead>
<tr>
<th>Report Name</th>
<th>Group</th>
<th>Application</th>
<th>Date Run</th>
<th># Selected</th>
<th>Sorts</th>
<th>Criteria</th>
<th>Reports</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mailing Labels</td>
<td>Glynda's Reports</td>
<td>MB</td>
<td>08/16/2005</td>
<td>193</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Mailroom labels</td>
<td>Glynda's Reports</td>
<td>MB</td>
<td>04/25/2005</td>
<td>213</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>

To add a new report, click New. To make changes, highlight the report and click Open. To delete a report, highlight the report and click Delete.
Select Applications

Then Click OK
Select Report Group and Name Report
Select Criteria

**Family Position**

- Include
- Exclude
- Legal Head of House
- Spouse where Legal HH not on file
- Child where Legal HH not on file
- Spouse
- Child
- Spouse or Child with Different Last Name
- Other Adult

**Member Status (MB)**

- Include
- Exclude
- Member
- Regular Attender
- Associate Member

Buttons: OK, Cancel, Delete
For Report Select
Build Presort
The sort order will be determined in Mailroom.
Next Select Print Parameters
Click Save Icon and then Close. To Run Report click Running Icon.
Once the report processes a message box will display to show where presort.sdf file is located.

The Build PreSort file just created contains 1,098 records
The file can be found at C:\Shelby\ssv5.dat\presort.sdf
Close Shelby if desired and open Shelby Bulk Mailer
Select to Open a Shelby Data File
Next locate presort.sdf under Shelby\ssv5.dat or other specified directory.
Next Select CASS Process List
The CASS Wizard will begin your Mailroom processing.

CASS = Coding Accuracy Support System
Select Address Formatting & Click Next
Fill-in your Mailing Information and Click Finish.
Those addresses not CASS certified can be reviewed. In this example there is not a street named WOODCUTTER COVE.
After fixing errors exit, to the Address Correction Progress screen to Print PS Form 3553
Once you close the Address Correction screen, you will begin the Presort Agent Process. Click Next to continue.
Next select to Create a New Template or Use an Existing one.
I will be using a Template for Standard Mail
On the Next Tab enter Mail Piece Information
The Next Tab will have Settings for Sort levels and other sorting options.
Under Advanced Options Sorting, select desired Options
Click Next to set up a Permit Template
Click Entry Points to assign any Applicable Discounts

**DDU (destination delivery unit) rate** — A discount/rate available to Periodicals and Standard Mail (A) that is properly prepared and entered by the mailer at the delivery unit that serves the delivery address on the mail.

**SCF (sectional center facility)** — A postal facility that serves as the processing and distribution center (P&DC) for post offices in a designated geographic area as defined by the first three digits of the ZIP Codes of those offices. Some SCFs serve more than one 3-digit ZIP Code range.

**Bulk Mail Center (BMC):** A highly mechanized mail processing plant that distributes Standard Mail and Package Services in piece and bulk form. Also see auxiliary service facility.
Click Next to setup the Tray Label
The next screen will allow you to view Presort results, Select Reports to Print, and setup a Label Template.
Click New to setup a new Label Template
Select type of Label or Mail Piece

Label Options
Select the layout. Choose Create New Layout to define a new layout if your labels are not listed.

Label Layout

<table>
<thead>
<tr>
<th>Name</th>
<th>Layout</th>
<th>Height</th>
<th>Width</th>
</tr>
</thead>
<tbody>
<tr>
<td>Avery 5159</td>
<td>2 x 7</td>
<td>1 1/2&quot;</td>
<td>4&quot;</td>
</tr>
<tr>
<td>Avery 5160</td>
<td>3 x 10</td>
<td>1&quot;</td>
<td>2 5/8&quot;</td>
</tr>
<tr>
<td>Avery 5161</td>
<td>2 x 10</td>
<td>1&quot;</td>
<td>4&quot;</td>
</tr>
<tr>
<td>Avery 5162</td>
<td>2 x 7</td>
<td>1 1/3&quot;</td>
<td>4&quot;</td>
</tr>
<tr>
<td>Avery 5260</td>
<td>3 x 10</td>
<td>1&quot;</td>
<td>2 5/8&quot;</td>
</tr>
<tr>
<td>Avery 5261</td>
<td>2 x 10</td>
<td>1&quot;</td>
<td>4&quot;</td>
</tr>
<tr>
<td>Avery 5262</td>
<td>2 x 7</td>
<td>1 1/3&quot;</td>
<td>4&quot;</td>
</tr>
<tr>
<td>Avery 5560</td>
<td>3 x 10</td>
<td>1&quot;</td>
<td>2 5/8&quot;</td>
</tr>
<tr>
<td>Avery 5810</td>
<td>3 x 10</td>
<td>1&quot;</td>
<td>2 5/8&quot;</td>
</tr>
<tr>
<td>Avery 5922</td>
<td>2 x 7</td>
<td>1 1/3&quot;</td>
<td>4&quot;</td>
</tr>
<tr>
<td>Avery 5960</td>
<td>3 x 10</td>
<td>1&quot;</td>
<td>2 5/8&quot;</td>
</tr>
</tbody>
</table>
Select Address Block Options

- Create a blank template.
- Add a basic address block.
- Add an address block with the endorsement line.
- Add an address block with the barcode.
- Add an address block with the barcode and endorsement line.
- Add a custom address block:

  - Left Indent: 0 inches
  - Top Indent: 0 inches

Address Block Location

Help  Cancel  < Back  Next >  Finish
Enter Title for new template
Click Finish to see Label Designer
To view design with Names and Addresses click on the Magnifying Glass
You can add items to template using the Database Fields Menu to insert data.
You can also add Static Text and Insert Picture to the mail piece.

http://www.usps.com/businessmail101/postage/designPermit.htm
If you are wanting to do a mail merge instead of labels or envelopes then exit after printing reports. Select “Yes” to save presort to database.
Next you will Select to save as a Comma Separated File
Next select location for saving file and after saving it, Exit Bulk Mailer.
To proceed with Mail Merge…

Open Excel and to view sort order of csv file. If it is not in Ascending order by Presort then select all fields and go to Data>Sort. Sort using the sort order below.
Once your data file is ready to use, open the **Template** for your **Newsletter** in **Publisher**. Click **Tools, Mail and Catalog Merge Merge**, and then **Mail and Catalog Merge Wizard**.
Under **Tools** Select **Mail Merge** and then Click Next to locate Data Source. Choose **Use Existing Data** under Select Data Source.
Click on **Data file** exported from Shelby and then Click **Open**.
A Text File Connection Parameters message may appear, if it does select Comma and Click OK.
All **Mail Merge Recipient** Records will show in Grid. Click **OK** to accept the list.
Now select **Next: Create your publication**.
When the **Merge Fields Display**

**select** the ones you want to place in document.

You will probably need to **change the font for the Bar Code to Sat Bar.**
Once a fields are placed on the document click **Next: Preview your publication** to proceed.
A Sample of the Merged Document will display.
If Merged Document looks correct then click **Next: Complete the merge**.
You are almost through.

Next Select **Print** to send all to Printer
or click **Create a new publication**
to save merged newsletters for printing later.
If you elect to **Create a new document** the individual copies will display at bottom of screen. To view any one of them click on the number.

Remember to **Save Template with the Merge Fields** for your Next Mailing.
Glossary

area distribution center (ADC) - A mail processing facility that receives and distributes mail destined for specific ZIP Codes under the Managed Mail Program (MMP). An ADC is one of the points within the national MMP distribution network.

automated area distribution center (AADC) - A distribution center that uses multiline optical character readers (MLOCRs), barcode sorters (BCSs), and other equipment designed for processing automation-compatible mail.

automation-compatible mail - Mail that can be scanned and processed by automated mail processing equipment such as a barcode sorter.

bulk mail - Mail that is rated for postage partly by weight and partly by the number of pieces in the mailing. The term is generally used to refer to Standard Mail (A).

bulk mail center (BMC) - A highly mechanized mail processing plant that distributes Standard Mail in piece and bulk form.

Coding Accuracy Support System (CASS) - A service offered to mailers, service bureaus, and software vendors that improves the accuracy of matching to delivery point codes, ZIP+4 codes, 5-digit ZIP Codes, and carrier route codes on mail pieces. CASS provides a common platform to measure the quality of address matching software and to diagnose and correct software problems.

delivery point barcode (DPBC) - A POSTNET barcode that consists of 62 bars with beginning and ending frame bars and 5 bars each for the nine digits of the ZIP+4 code, the last 2 digits of the primary street address number (or post office box, etc.), and a correction digit. The DPBC allows automated sortation of letter mail to the carrier level in walk sequence.

destination delivery unit (DDU) rate - A rate available for Periodicals and Standard Mail that is properly prepared and entered by the mailer at the delivery unit that serves the delivery address on the mail.

destination sectional center facility (DSCF) rate - A rate available for Periodicals (except In-County) and Standard Mail that is properly prepared and entered by the mailer at the sectional center facility (SCF) (or, for certain Parcel Post, at the BMC) that serves the delivery address on the mail.

entry SCF - The sectional center facility (SCF) at which mail is entered by the mailer or that serves the post office where the mail is entered. An SCF can have responsibility for an area covering either single- or multi-3-digit ZIP Codes.
Glossary

flat-size mail - A mailpiece that exceeds one of the dimensions for letter-size mail (11-1/2 inches long, 6-1/8 inches high, 1/4 inch thick) but that does not exceed the maximum dimension for the mail processing category (15 inches long, 12 inches high, 3/4 inch thick). Dimensions are different for automation rate flat-size mail eligibility. Flat-size mail may be unwrapped, sleeved, wrapped, or enveloped.

letter-size mail - A mail processing category of mailpieces, including cards, that do not exceed any of the dimensions for letter-size mail (that is, 11-1/2 inches long, 6-1/8 inches high, 1/4 inch thick).

line-of-travel (LOT) sequence - A presort for Enhanced Carrier Route rates in which mailpieces are arranged by ZIP+4 codes in the order in which the route is served by the carrier. The mailpieces are sequenced in delivery order.

Machinable - The capacity of a mailpiece to be sorted by mail processing equipment.

nonmachinable - The incapacity of a mailpiece to be sorted on mail processing equipment because of size, shape, content, or address legibility. Such mail must be processed manually.

package - A group of addressed pieces assembled and secured together to make up a basic unit of bulk mail for processing purposes.

optional endorsement line (OEL) - A series of specific printed characters on the top line of the address block that identifies the sortation level of a package or bundle and may contain an ACS participant code. The OEL is used in place of package labels.

Periodicals - A class of mail consisting of magazines, newspapers, or other publications formed of printed sheets that are issued at least four times a year at regular, specified intervals (frequency) from a known office of publication. Periodicals usually must have a legitimate list of subscribers and requesters.

Standard Mail (A) - Standard Mail matter that weighs less than 16 ounces. It comprises the subclasses of Regular Standard Mail, Nonprofit Standard Mail, Enhanced Carrier Route Standard Mail, and Nonprofit Enhanced Carrier Route Standard Mail. These subclasses include circulars, printed matter, pamphlets, catalogs, newsletters, direct mail, and merchandise. Standard Mail (A) may be sent at presorted rates and at automation rates.
presort levels - Terms used for presort levels are defined as follows:

firm: all pieces for delivery at the business address shown on the top piece of a package or bundle.

carrier route: all pieces for delivery on the same city route, rural route, highway contract route, post office box section, or general delivery unit.

5-digit: the delivery address on all pieces includes the same 5-digit ZIP Code.

5-digit scheme: the 5-digit ZIP Codes identified in the USPS City State File and processed by the USPS as a single scheme and that, subject to standard, may be presorted together as a single group. The 5-digit scheme sort is always optional.

3-digit: the ZIP Code in the delivery address on all pieces begins with the same three digits.

3-digit scheme: the ZIP Code on the delivery address on all pieces begins with one of the 3-digit prefixes processed by the USPS as a single scheme and that, subject to standard, may be presorted together as a single group.

entry SCF 3-digit(s): the ZIP Code in the delivery address on all pieces begins with one of the 3-digit prefixes processed at the postal facility in whose service area the mailer is located.

SCF: the separation includes pieces for two or more 3-digit areas served by the same SCF.

ADC/AADC: all pieces are addressed for delivery in the service area of the same ADC or AADC.

ASF/BMC: all pieces are addressed for delivery in the service area of the same ASF or BMC.

DSCF: pieces sorted to and entered at the destination SCF. (Also see plant-verified drop shipment.)

DDU: pieces sorted to and entered at the destination delivery unit.

BMC Presort: pieces sorted to BMCs if Machinable or BMC/ASF if nonmachinable. Entered at a facility (other than BMC) that accepts bulk mail.
Glossary

**OBMC Presort:** pieces sorted to BMCs if Machinable or BMC/ASF if nonmachinable. Entered at a BMC.

**mixed (BMC, AADC, etc.):** the pieces are for more than one presort destination.

**residual [pieces/packages/sacks]:** mail that is left over after completion of a presort sequence. Residual mail lacks the volume set by standard to require or permit package or bundle preparation to a particular destination. (Also called nonqualifying or working mail.)

**ZIP+4** - The nine-digit numeric code, established in 1981, composed of two parts: (a) The initial code: the first five digits that identify the sectional center facility and delivery area associated with the address, followed by a hyphen; and (b) the four-digit expanded code: the first two additional digits designate the sector (a geographic area) and the last two digits designate the segment (a building, floor, etc.). ZIP+4 is a USPS trademark.