# Using
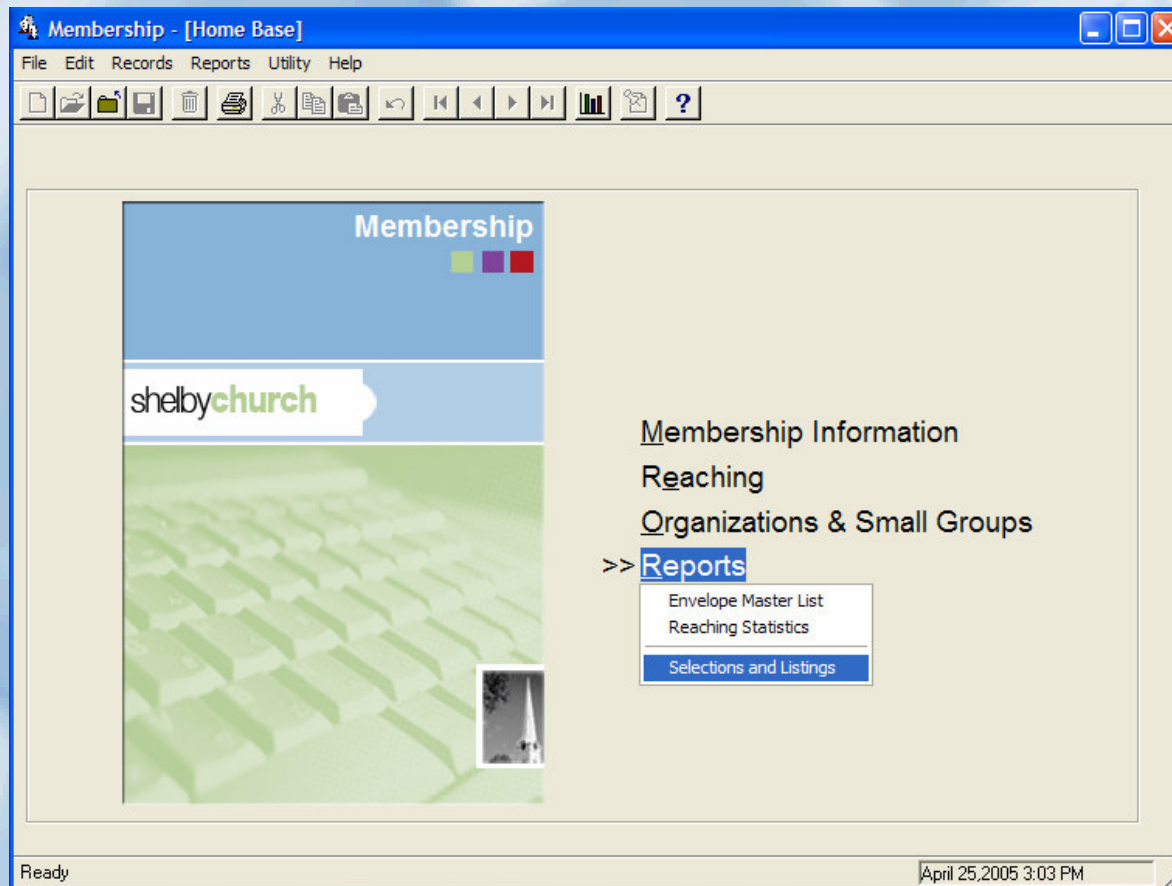# Shelby Mailroom
# to send bulk mail!

# In Membership go to Reports>Selections & Listings

# To begin Create a New Report

# Select Applications



## Then Click OK
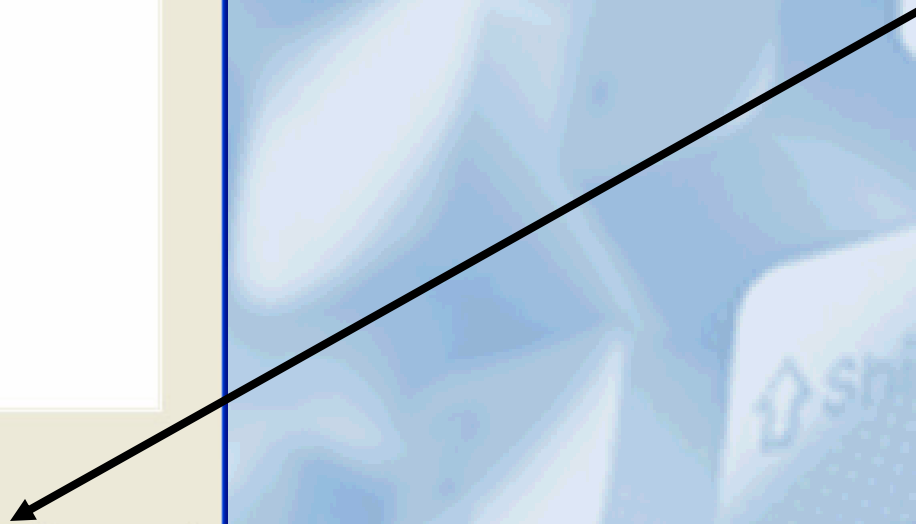
# Select Report Group and Name Report

# Select Criteria

# 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.

# 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
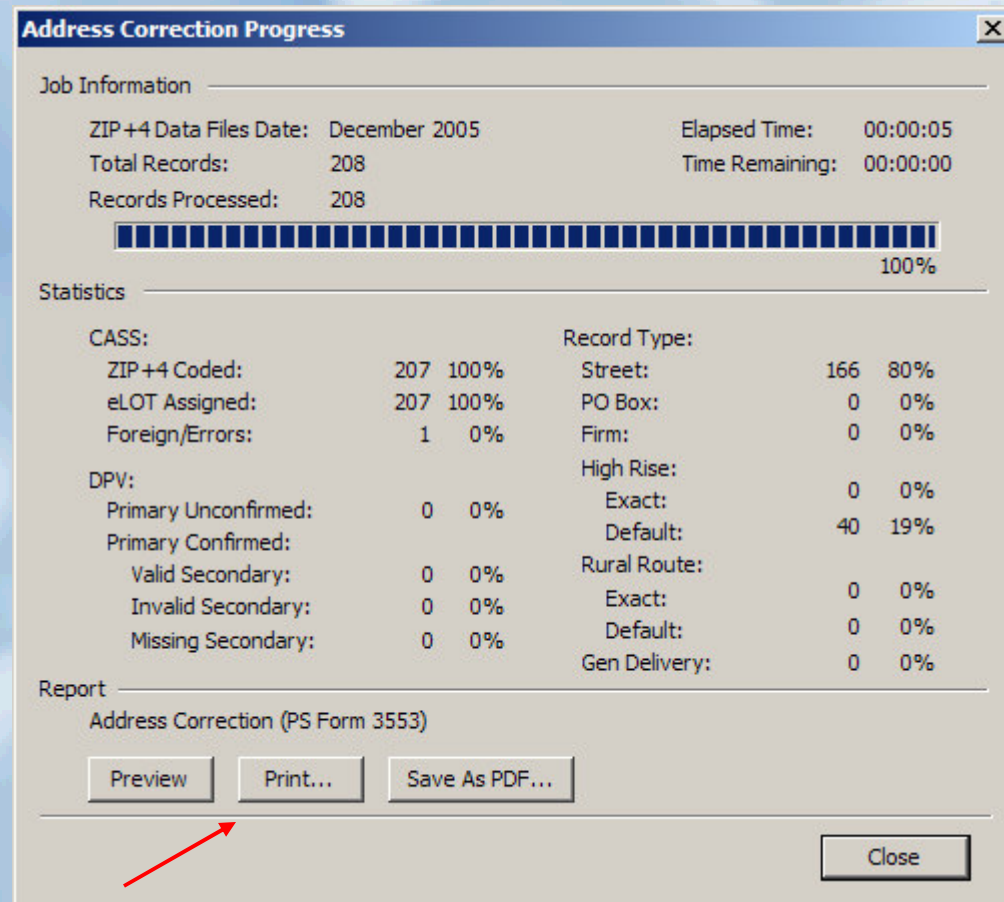
**Once you close the Address Correction screen, you will begin the Presort Agent Process. Click Next to continue.**

# Next select to Create a New Template or Use an Existing one.

# I will be using a Template for Standard Mail
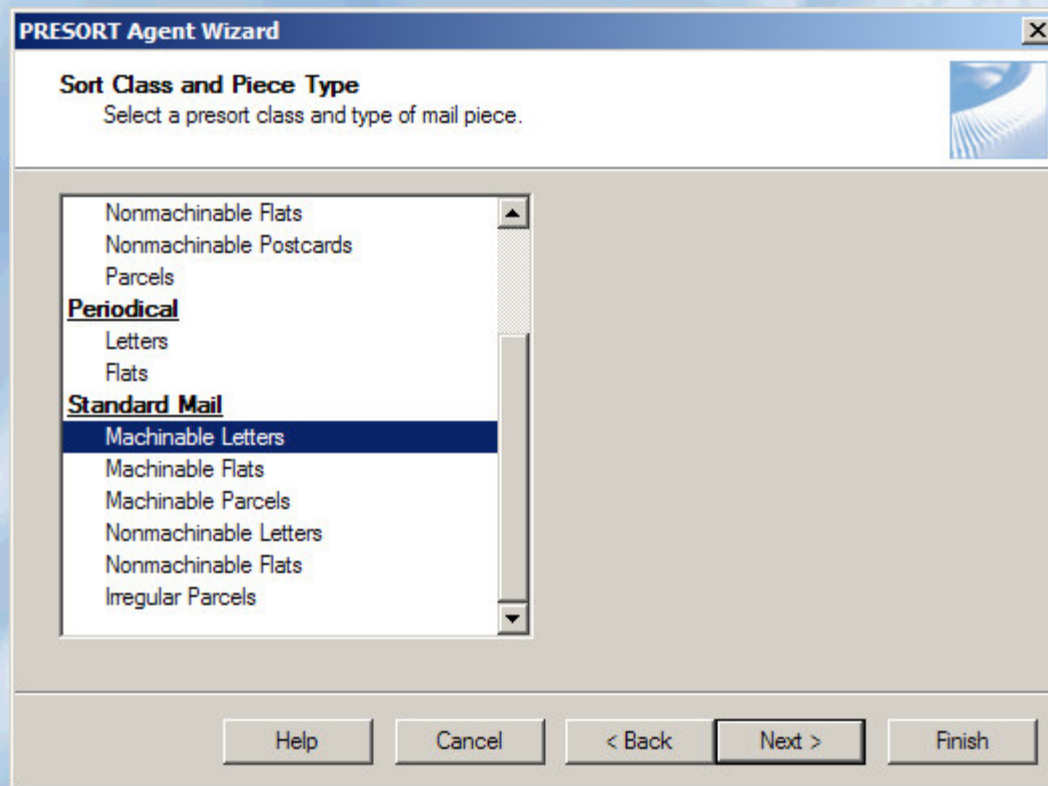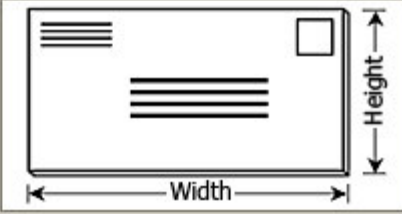
# On the Next Tab enter Mail Piece Information

# 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.

**PRESORT Agent Wizard**

**Mail Sort Discounts**
Select the mail sort discounts for which you qualify.

Eligibility Discount
☑ Nonprofit rate

Destination Entry Discounts
☑ Sectional Center Facility (SCF)
☐ Bulk Mail Center (BMC)
☐ Area Distribution Center (ADC)
☐ Destination Delivery Unit (DDU)    [Add ZIP]

[Remove]

[Help]  [Cancel]  [< Back]  [Next >]  [Finish]

**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

# Select Address Block Options

# Enter Title for new template

**Label Designer Wizard Summary**
Review the settings of your template to confirm they are correct, then save the template.

Summary

Type: Labels - Sheet or Continuous

Printer: \\printserver\Support 2

Layout: Avery 5159

Address block with endorsement line and barcode selected.

Template

Name: [                    ]

Help    Cancel    < Back    Next >    Finish

# Click Finish to see Label Designer
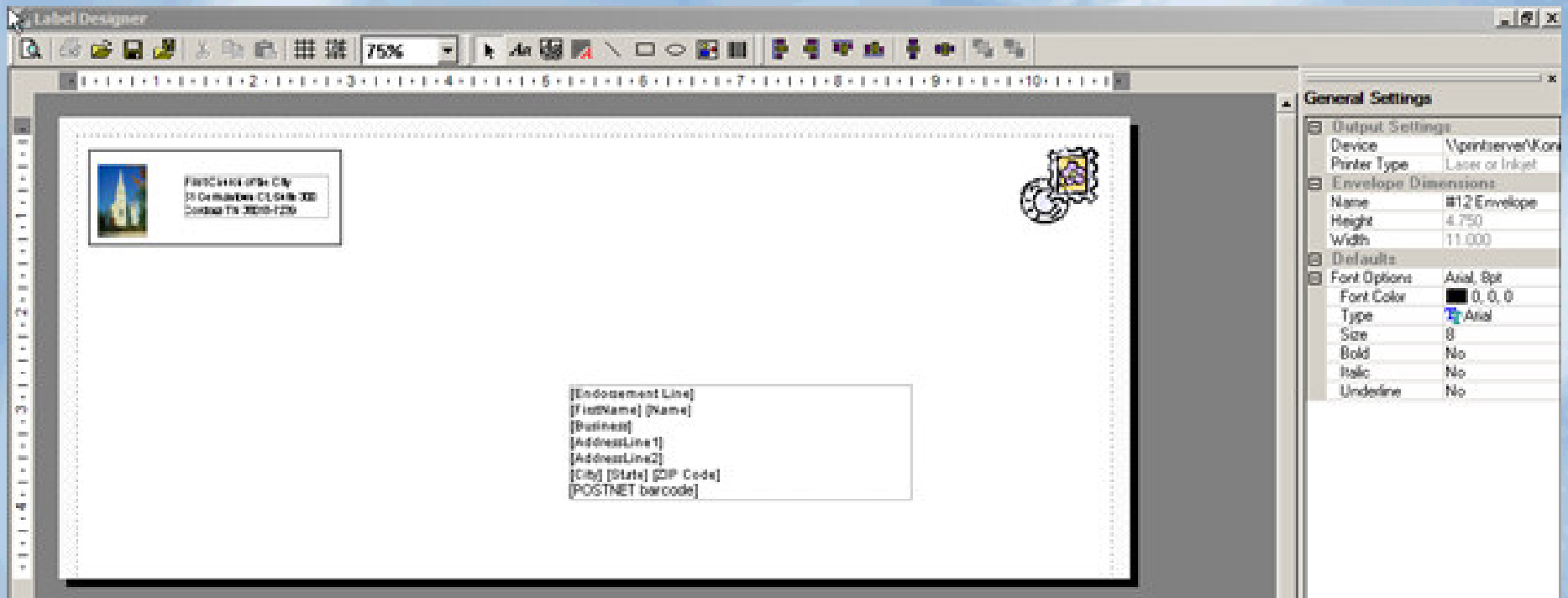
# To view design with Names and Addresses click on the Magnifying Glass
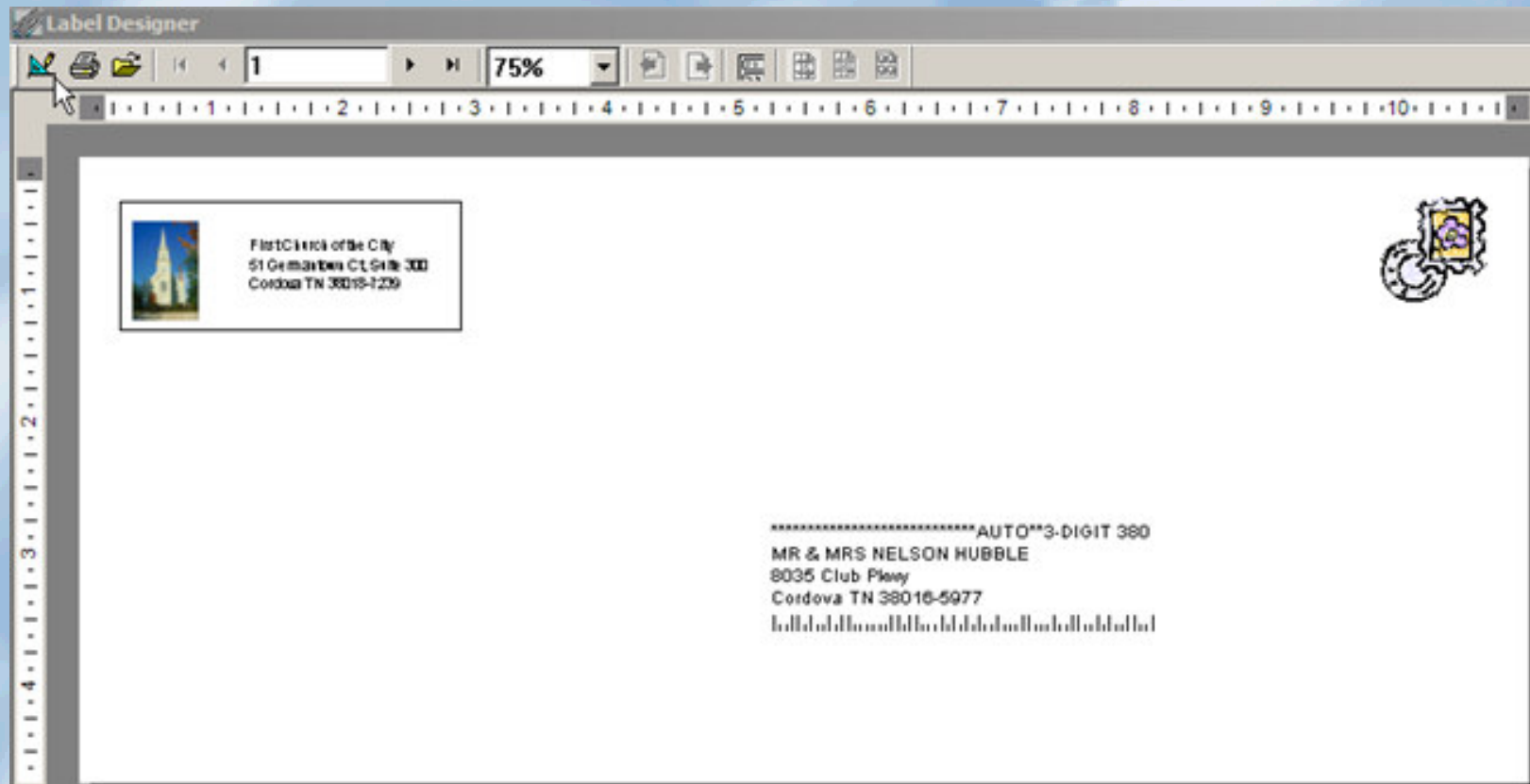
# You can add items to template using the Database Fields Menu to insert data.
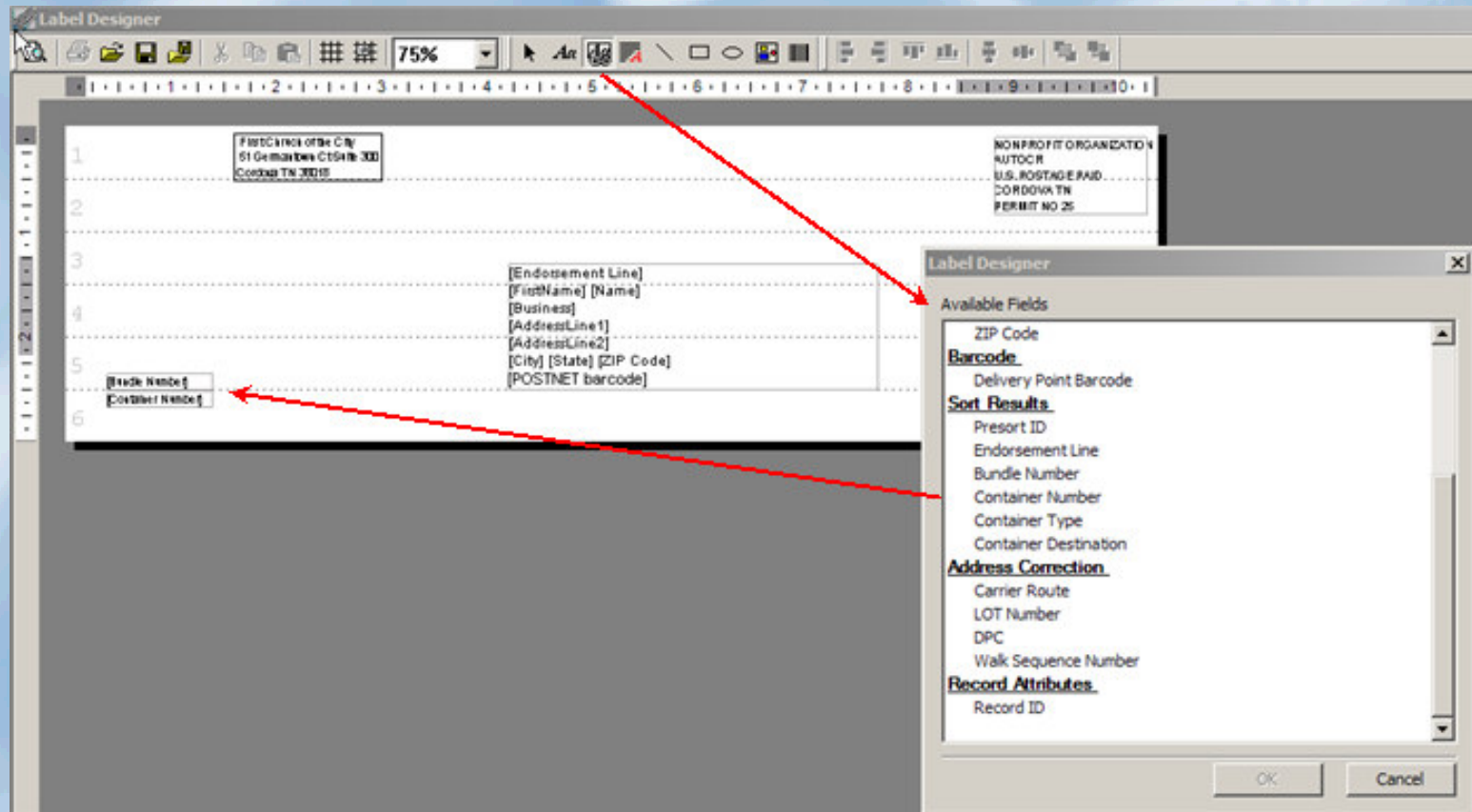
# You can also add Static Text and Insert Picture to the mail piece.
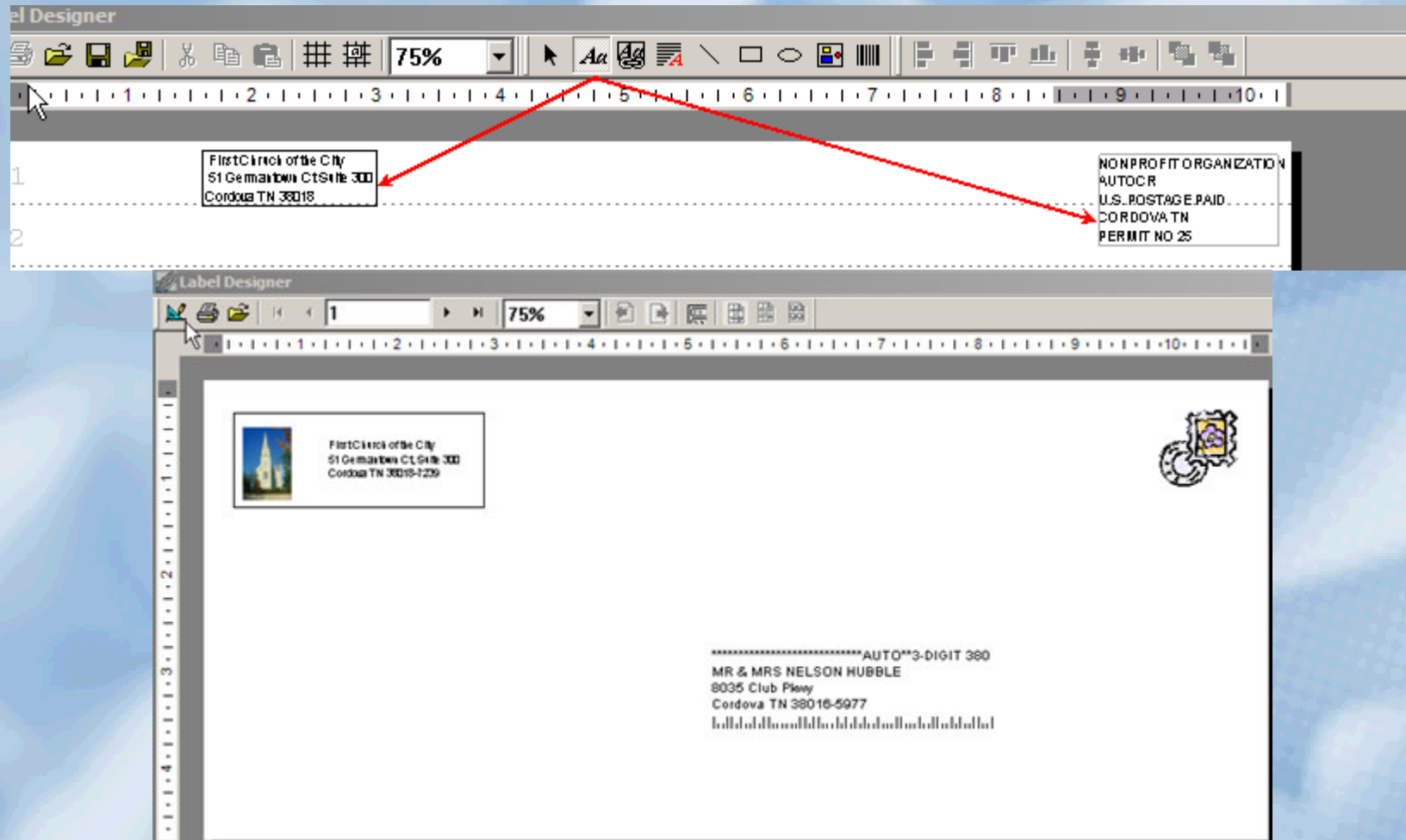
# Glossary

**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.

# Glossary

**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.