Postalsoft DeskTop Mailer and PostalCoder
Quick Tour

This Quick Tour provides instructions for some basic tasks in Postalsoft. By the end of the Quick Tour, you should have a basic knowledge of Postalsoft's interface and features. For in-depth information, refer to the Postalsoft User's Guide and online help. The Quick Tour is also featured in Postalsoft's online help. See page 14 in the *Postalsoft User's Guide* for an introduction to using online help.

Opening Postalsoft

Choose Start | Programs | DeskTop Mailer or PostalCoder.

Opening the sample mailing list

1. Choose File | Open.

2. Select the **sample.mdf** file, and click Open.

3. Maximize your file window by clicking the square in the upper right corner of the **sample.mdf** window.

What's on screen

When you open the sample file, the menu and toolbar become active. The name of the file, **sample.mdf**, appears at the top of the window.

The menu bar is located at the top of the Postalsoft window, just under the name of the file. You can start most procedures from the menu bar.

Toolbar buttons are located right under the menu bar. They serve as shortcuts to common procedures. When you place your cursor over a button (don't click), the name of the button appears and a brief description appears in the lower left corner of the window.

The main window is located in the center of the Postalsoft window. View, edit, and add records here. There are two different ways to view your records:

• **Data Form view** displays one record at a time.

• **Data Sheet view** displays your entire viewable database, one page at a time, in spreadsheet form.

Use your tab or arrow keys to maneuver around the fields and records. Change views by choosing View | Data Form or View | Data Sheet.

The status bar is located at the bottom of the Postalsoft window. The status bar buttons make it fast and easy to navigate your database.

Sample database

The **sample.mdf** file contains records of fictitious people in La Crosse, Wisconsin. The fields are:

• First	• State (abbreviation)
• Last	• ZIP
• Address_1	• DP2 and DPC (barcode info.)
• City	• Err_Stat (error status codes)

You can customize your mailing list by adding additional fields. And you can create your custom layout when you create your file, or after you create your file, by choosing File | Properties | Database.

Browsing the records

When you open your file in Data Form view, a blank record appears in the main window. When you open your file in Data Sheet view, a blank record is highlighted at the bottom of your page. The opening view depends upon the view in which you closed the file.

In either view, the program is ready for you to begin entering a new record, or you can perform other tasks such as address correction.

Finding the first record
Choose Search | Go to | First Record. You are now viewing the first record in the database. If you have the index set to No Index, the record number in the status bar should be 1.

Going to the next record
Choose Search | Go to | Next Record to view the next record. If you are in Data Sheet view, the arrow in the left column moves down one row, and the row becomes selected.

Going to the last record
Choose Search | Go to | Last record.

Adding your name to the database

1. Choose Edit | Append Record.

2. Type your first name in the First field. Press the Tab or Enter key to move to the next field, and fill in the remaining fields. Leave the DP2, DPC, and Err_Stat fields empty. (We'll correct addresses in the next step to complete these fields.)

Correcting an address

During address correction, Postalsoft updates the address fields with correct address information, depending on the fields included in the mailing list and the correction settings you choose.

In the sample file, expect the ZIP, DPC, DP2, and Err_Stat fields to be updated. The City, State, and Address_1 fields are also updated or corrected if needed.

Before you correct addresses, you should check the settings to see that they're set up as you want (Tools | Correct Addresses | Correction Settings). For now, we'll leave the default settings.

Correcting addresses

1. If you're using postal directories from CD, insert the postal directory's compact disc into the CD drive. (If you have copied your directories to the hard disk, there is no need to do this.)

2. Make sure that the main window is displaying your record (the one you just added), or if you are in Data Sheet view, make sure your record is highlighted. Then choose Tools | Correct Address | Current Record.

Your record is updated according to the default options:

• The Address_1, City, and State fields are capitalized.

• The complete ZIP Code, delivery-point add-on, check digit, and status code are completed.

If you want to correct more than one record at a time, choose Tools | Correct Address | Multi-record. For the quick tour, will skip this step.

Changing the index

The index determines the order in which records are processed. For example, when we browsed records earlier, we were in record number sequence (No Index was selected). You can change the viewing order by sorting by any field that is indexed.

Change the sample file to last name order. Choose Records | Indexed by | Last, or choose Last from the index drop-down

list on the status bar. To better view the change, choose View | Data Sheet.

The first record in the file is no longer record 1. It's the record that comes first alphabetically in last name order.

Finding a record

1. Make sure your index is set to Last. Choose Search | Quick Find.

2. Type your last name exactly as you entered it in your record earlier. Set the Match to = (Equals), and click OK. Your record is now displayed (Data Form view) or highlighted (Data Sheet view).

You may need to scroll up or down in the database to find your first name.

Deleting your record

1. If your record is not currently displayed, display it now using Search | Quick Find.

2. Choose Edit | Delete Record or click the DEL button on the status bar.

In Data Form view, Postalsoft deletes your record and displays the next record in the file. In Data Sheet view, the software removes the record from the list of records, and the next record becomes highlighted.

Even though your record is no longer an active part of the file, the software still keeps track of it, in case you change your mind and later want to retrieve it. View deleted records by choosing View | Deleted Records.

Choose View | Non-deleted Records to return to the previous view.

Finding and processing duplicate records

You can find duplicate records in your file(s) and then delete them, select them, or copy them to another file. We call this the merge/purge process.

In the steps of a merge/purge, there are so many options to choose from that we can't explain them all here. Read chapter 7 of the *Postalsoft User's Guide* and the many online help topics associated with merge/purge for explanations of functionality.

The software identifies records as duplicates by using scoring and weighting factors from a chosen rulebook. We provide 20 different rulebooks for your use.

Before you merge/purge your records you need to choose a rulebook and set other options.

To set up your merge/purge:

1. Choose Tools | Merge/Purge.

2. Leave the File Usage setting at Input, Normal List, All Non-Deleted records. Leave the priority at 1. Click Next.

3. At the top of the Step 2 window, leave the Compare Records option (prequalifier) set to Same 5-Digit ZIP.

4. From the list on the left of the window, scroll down and select the **Individ Loose.mpr** rulebook, and click Next.

5. Choose Delete all but Highest Priority Dupe in Every Dupe Group from the Input File drop-down list.

6. In the Interactive Control box, choose Show Undecided Pairs for Manual Verdict and Show Summary of Dupes Found.

7. Click Next, and review your options. Click Finish when you have finished setting up your merge/purge.

Undecided pairs

The Undecided Dupe Comparison window appears because you chose the option to show undecided pairs for manual verdict in the previous window. Decide whether records are duplicates or not by reviewing the contents of the records' fields. Click Dupe if the records are duplicates, or click Not Dupe if the records are not duplicates.

When you have viewed as many pairs as you like, select Don't Show any More Undecided Pairs, and decide on the last pair displayed. The software judges the remaining undecided pairs.

Summary of duplicates

View the duplicate groups in this window. You can decide to delete a record by selecting the Delete checkbox for the record.

To view the next group of duplicates, click Next Group. To proceed with the merge/purge, click Perform Actions. A window appears telling you how many duplicates were found and how many, if any, were deleted.

Presorting *(Postalsoft DeskTop Mailer only)*

The software will walk you through a presort *wizard*, a series of "step" windows where you'll define your mailing and set up various options. Follow these steps to presort the sample database.

Presort wizard step 1

Imagine that you're mailing a promotional piece that's part of a summer-long ad campaign.

1. Choose Tools | Presort | Sort Settings.

2. Enter a general description of this job, and the job owner's name. Type **Summer Campaign** in the Description box, and **La Crosse Mailers** in the Owner box.

3. Select Standard Mail to specify a promotional kind of mailing. Click Next to advance to step 2.

4. Click Yes to create your work and report paths, if necessary.

Presort wizard step 2

Define the mail piece by giving the mail piece a name, and then choosing options to describe it.

1. Type **Promo 1** in the Description box.

2. Choose Automated Letter from the Proc. Category drop-down list. This piece fits into the automated-letter processing category because its dimensions define it as a letter, each piece has a delivery-point barcode, and it complies with other USPS regulations for automated letters

3. Accept the default measurements for the mail piece, and click the Next button to advance to the next step.

Presort wizard step 3

Bulk Mail Centers (BMC), Automated Service Facilities (ASF), and Sectional Center Facilities (SCF), are listed in the appropriate drop-down list at the top of the window. When you select one, Postalsoft automatically completes the information at the bottom of the window. If your post office is not one of these, select Other and type your post office's information at the bottom. For our tour, we'll do this:

1. Choose 54601 La Crosse from the SCF drop-down list. Notice that the software automatically selects the SCF Discount option for you. A sample permit number appears in the Mailer Permit # box; normally you would type your own permit number there.

2. Click the Next button to advance.

Presort wizard step 4

The software automatically chooses appropriate schemes for you based on your choices in the first three steps. When you run your own presorts, you can change the default schemes if you want to. We'll accept the default schemes for now.

Click the Details buttons if you want to view some more options available to you. We'll leave the default settings for now. Later, when you do your own mailings, you'll want to carefully choose all of your options. Click Next to advance to the next step.

Presort wizard step 5

1. Click Begin Presorting.

2. Select All Non-Deleted Records, and click OK. When the presort is complete, the Summary window appears.

3. Review the summary, and click OK.

4. Fill in the Permit Holder section as follows: **La Crosse Mailers, 123 Mailer Ave., LaCrosse WI 54601, 608-555-1234** (for phone), **No** (for non-profit) Permit (for payment method). Click OK.

Your file is now presorted.

Previewing reports

Now that you have presorted your file, preview the presort reports to ensure that your file was presorted the way you wanted. Here's how to preview and print your presort reports:

1. Choose Print | Reports. Click the presort printer icon to open the list of presort reports if they aren't displayed.

2. Select the report that you want to preview. Click the Preview button.

3. To print from the Preview screen, click the Printer icon.

4. In the Print Presort *Report Type* window, click OK.

Printing address labels

To print your address labels, you need to assign a design file (a file that contains information about your labels, including the page size and dimensions and the layout of the label). There are many of predefined design files available, or you can create your own.
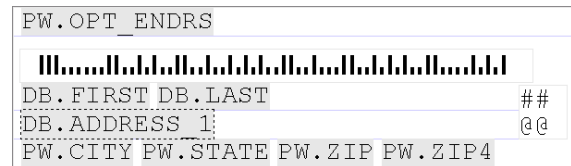
In this part of the Quick Tour, we will modify an existing design file to print a label for each person in the sample file. To do this:

1. Choose Print | Presorted Labels | Design.

2. Select the **LTADDRESS11.ltd** design file, and click Edit.

3. In the Objects window, expand the DB category. Drag and drop the DB.First field onto the line below the Postnet barcode. Drag and drop the DB.Last field onto the layout to the right of the DB.First field.
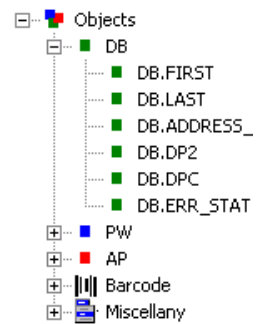
4. Drag and drop the DB.Address_1 field onto the layout below the first and last name fields. Your layout should like this:

```
PW.OPT_ENDRS

|||....||.|.|.||.|.|.|.|.||.|..||.|.|.||...|.||
DB.FIRST DB.LAST                              ##
DB.ADDRESS_1                                  @@
PW.CITY PW.STATE PW.ZIP PW.ZIP4
```

5. Choose File | Save As, and click Yes to save your file with errors. (For the purposes of the Quick Tour, this is okay.)

6. Rename your file to **Sample.ltd**, and click Save. Choose File | Exit.

7. In the Address Label Preview window, be sure your file (**Sample.ltd**) is selected, and click Select.

The **Sample.ltd** design file is now assigned to your **.mdf** file.

Printing labels

If you haven't already done so, you need to connect and set up your printer before you can print. See your printer manual for details. Make sure your printer is on and loaded with plain paper—just to see how the labels will look.

1. Choose Print | Presorted labels | Print.

2. Select the Pages option, and type **1** in the From and To boxes.

3. Click OK. Click Done.

Closing the file

Unlike many other programs, your work is automatically saved for you when you close the file. However, you should always exit the software before shutting off your computer.

• To close the sample file without exiting the software, choose File | Close.

• To close the file and the software, choose File | Exit.