



# Bulk Mailer   A Tutorial

## Introduction

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This tutorial will give you a good foundation for using the features of Bulk Mailer 5 and will increase your comfort level for navigating within the program. While you may not actually use Bulk Mailer 5 in the linear fashion presented in this tutorial, we recommend you follow the tutorial in order as each new concept presented builds on those presented before.

A tutorial is not intended to cover every possible option. If you have specific questions as you work through the lessons, please refer to Chapter 3 of the User Guide or to the online help system for a detailed discussion of all the features and options of the application.

If you encounter terms that are unfamiliar, you may want to consult the Glossary in Chapter 4 of the User Guide. The same Glossary is available in the online help system.

In the tutorial, you will learn how to:

- **Create a new Bulk Mailer 5 file**
- **Import an address file**
- **Look at different views of your data**
- **Specify criteria to select a subgroup of your file**
- **Run Address Correction to create a CASS-certified file**
- **Perform a duplicate record search**
- **Presort, print tray or sack labels, and print postal reports**

## Creating a new Bulk Mailer file

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- **Look at and print mailing labels**

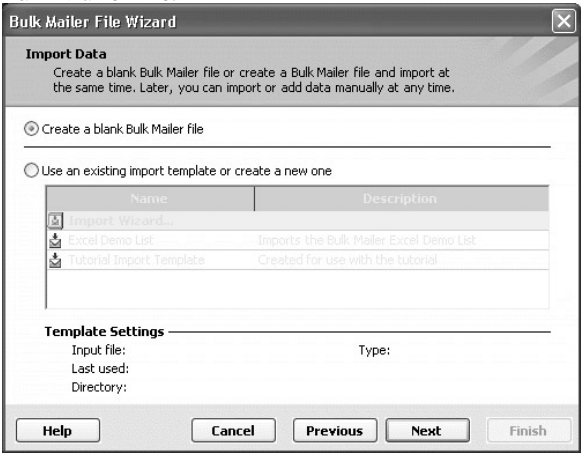
When launched, Bulk Mailer 5 opens to the Bulk Mailer Home page. When you first launch Bulk Mailer 5, no file is open. You must create a new file or open an existing file from the File List on the Bulk Mailer Home page by double-clicking it.

We'll create a new file to use in the tutorial.

1. Double-click the New File Wizard icon at the top of the File List.
2. Click Next at the wizard Welcome screen.

The Import Data screen allows you to create a blank Bulk Mailer file and, optionally, import data at the same time. For the tutorial, we will just create a blank Bulk Mailer file.

*Bulk Mailer 5 File Wizard within the Import screen*



3. Click Next to accept the Create a blank Bulk Mailer file selection. The Bulk Mailer File Wizard Summary screen will then display.

Bulk Mailer 5 automatically generates a name for your new file based on the date and time it is being created. A file created at 2:15 P.M. on January 22 would be called: 0122-1415.bmf. A 24-hour clock is used for the time portion of the name to distinguish between A.M. and P.M.

Notice that a default folder is selected for saving your file, however you can save your files in any folder that you choose. We will save this file to the default location but will give it a different name.

4. Highlight the default name and type “Tutorial New File” in the file name field. Bulk Mailer 5 will automatically append the .bmf file extension.
5. Type “Tutorial Bulk Mailer File” in the file description field. (The Description field text is optional.)
6. Click Finish.

*Bulk Mailer 5  
File Wizard Sum-  
mary screen*



You will be returned to the Bulk Mailer Home page. Your new file now appears on the File List and has been opened automatically. Nothing changes on the Home Page screen except that the open file is highlighted on the File List, is listed on the Title Bar at the very top of the page, and is reflected in the Data Details.

Look at the Data Details in the lower left corner of the screen.

- You will see “Tutorial New File” as the File Name
- “All Records” as the Group
- The Current Count and Total Count will both be zero.

While you do have a Bulk Mailer file open, it is blank and contains no records. Address records can either be imported from an external file or entered directly. The next step in the tutorial is to import data into your new Bulk Mailer file.

## Importing an Address File

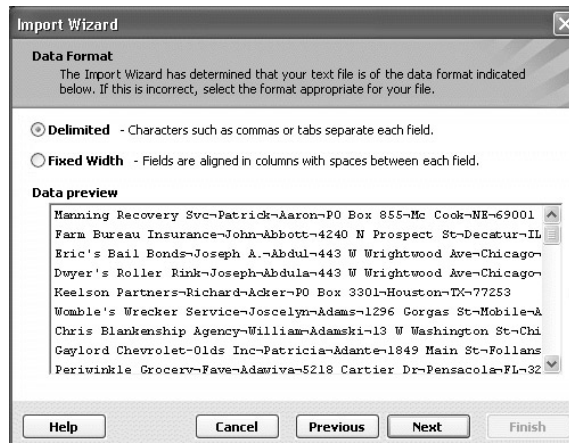
Bulk Mailer 5 can import data from a variety of different file formats. One of the more common types of files is a delimited text file, with the fields of data separated – or delimited – by commas, tabs, or other characters. Text files usually have a .txt file extension. We will import this type file.

We will continue to work with the new file you created, Tutorial New File. If that is not the file currently displayed in the Data Details window, go to the File List and double-click it to open it. When you open a file from the File List, nothing happens other than the file information displaying in the Data Details window, and the file name changing to an offset color in the file list.

### Opening the Import Wizard

1. Click the Import/Export icon on the Navigation Bar to move to the Import/Export page.
2. Double-click the Import Wizard at the top of the Import Templates List to launch the wizard.
3. Click Next and the Source File screen will display. This is where you select the external data file you want to import.
4. Click the Select File button and the Select File screen will display.
5. Double-click the Tutorial Import.txt file to select it.
6. Click Next and the Data Format screen will display.

*Bulk Mailer 5  
Import Wizard  
previewing  
delimited text*



## Selecting and Mapping an Import File

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1. Select the Delimited option. The first 50 records of the file will display in the scrollable Data Preview window.
2. Click Next and the Delimited Text File screen will display. You will see the first 50 records of the file with the data fields separated into numbered columns.
3. Click Next. In the Field Mapping screen, you tell Bulk Mailer 5 which data is contained in each of the columns you want to import. You can select as few or as many columns of data as you like.

If your file contains non-standard data, you can map it to any one of the five User Defined fields.

The first record in your file will be displayed on the left side of the screen under "Source" and the first data field – which in our file is the company name – will be highlighted.

4. Select Business in the Bulk Mailer box, then click the Map button.

The column you have mapped to Business will now display next to Business under the Source heading. This tells you which Source columns are mapped to which data fields in Bulk Mailer.

Repeat this process until all the columns are mapped. If you make a mistake, click on the Bulk Mailer field that is incorrectly mapped, and click the Unmap button.

The Reset button clears all mapped fields allowing you to start over.

5. Click Next and the Import Wizard Summary screen will display.

## Finishing the Import Set Up Process

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The Import Wizard Summary screen provides information about the file you are importing and your field mapping choices. You have the option to select:

Import file based on settings, which will import the data into the open Bulk Mailer file (Tutorial New File – the blank file you created before beginning the import process) but will not save the import settings as a template.

Save settings as a new template, which will save the import settings as a template that you can use again, but will not import the data.

Both options, which will import the data into the Tutorial New File and save the settings as a template you can use again.

1. Select both options.
2. Click in the Name: box and type "Tutorial Import Template."
3. Click in the Description: box and type "Created for use with the tutorial."
4. Click Finish.
5. Click Close when the import process has completed.

You will be returned to the Import/Export page. Your saved import template will be on the Import Templates List.

*New templates are displayed as they are created*



The import template you created can be used again to import the same external file or any other tab delimited text file that has data elements formatted the same way. You can use the same import template with any Bulk Mailer file. Templates and Bulk Mailer files are not linked in any way.

## Data Details

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Look at the Data Details window in the lower left corner of the screen. You will see that the Tutorial New File you created has now been populated with the records from the external file you just imported.

Everything you do in Bulk Mailer 5 affects only the currently open file or group, so check the Data Details before you take any actions to be sure you are working with the correct file.



## Viewing Your File

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We will continue to work with the new file you created, Tutorial New File. If that is not the file currently displayed in the Data Details window, go to the File List and double-click it to open it.

Views are windows that allow you to see the address records in your file. Bulk Mailer 5 has two types of views, List Views and Detail Views. List Views display multiple records in a grid or spreadsheet-like format. Detail Views display records one at a time. You can manually add or edit data in either view.

### List Views

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List Views are useful when you want to work with more than one record or want to look at an entire list in one window. Using a List View is like working with a spreadsheet. You can use the pre-designed List Views that come with Bulk Mailer 5, or you can custom design new ones which can be saved as List View Templates. As with all templates in Bulk Mailer 5, List View Templates can be used with any Bulk Mailer file.

### Using a View

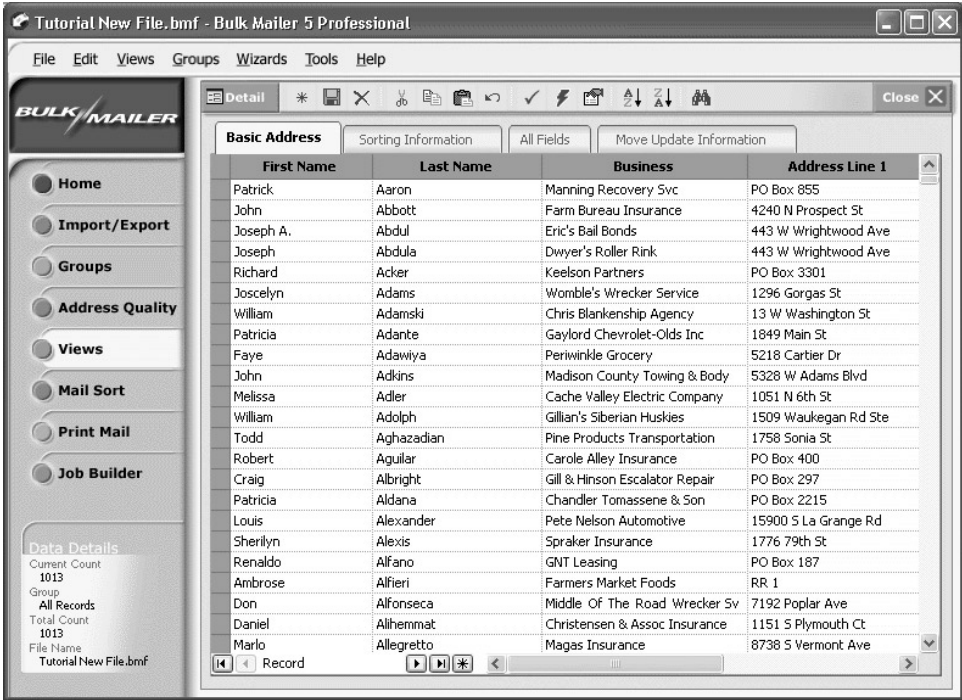
1. Click the Views icon on the Navigation Bar to open the Views page. The Views page contains the List Views and Detail Views sections.

The List View Wizard allows you to create custom view templates that you can apply to any Bulk Mailer File by selecting the specific data fields you want to see. For the purpose of the Tutorial, we will use one of the pre-designed Views.

2. Double-click the Basic Address template on the List View Templates List. The view defined in this template will now be applied to the data in the Tutorial New File you created. By using the Basic Address Template, you will always see the data in any file in this format. The following fields will be displayed:

- First Name
- Last Name
- Business Name
- Address Lines 1 and 2
- City
- State
- ZIP

List Views can be customized



3. Click the Views icon on the Navigation Bar to return the Views page.

All custom views are created with the List View Wizard and all saved templates will appear on the List View Templates List.

Detail Views

Detail Views are useful when you are adding records manually and want to focus on one record at a time. Using a Detail View is like working with an address or card file. This overview will help you become familiar with the Detail Views, but we will not be using them in the Tutorial.

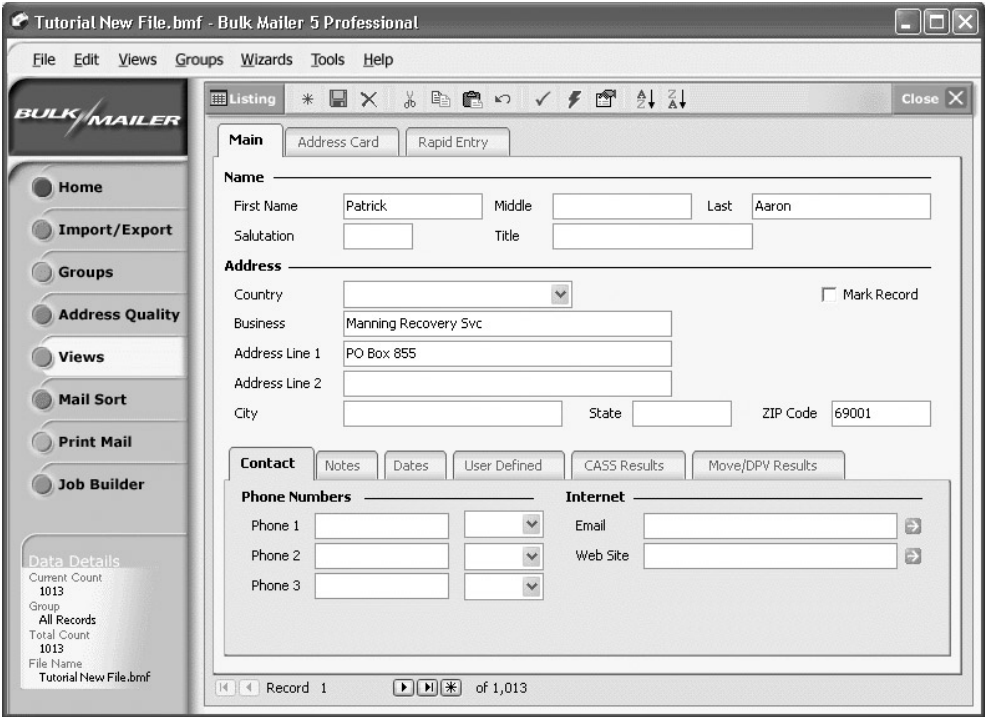
Bulk Mailer 5 comes with three pre-formatted Detail Views:

- Main
- Rapid Entry
- Address Card

Main

The Main view allows you to see every data field in your Bulk Mailer file, one record at a time. Name, Address, and Contact information are the default data elements that display when the Main view is opened. Additional data fields are grouped by type and can be accessed by clicking the labeled tabs above the Phone Numbers and Internet sections.

Bulk Mailer 5  
Detail View Main  
screen



Rapid Entry

The Rapid Entry view displays just Name, Address, and Contact information and is designed to allow you to quickly key in minimal address elements in order to enter a new record. Typing the ZIP Code first allows the City and State to be filled in automatically.

Address Card

The Address Card view is like an index card organizer or address card with basic Name, Address, and Contact information. If you are interested in basic address entry only, you might prefer this view.

## Adding New Records

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Adding new records to an existing file is easy. It can be done in any List or Detail View. Simply click the New icon on the Views toolbar.



In a List View, the cursor will move to a blank row at the end of your file. In a Detail View, you are presented with a blank card. Click in any field and begin typing.

# Grouping Your Records

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The Groups feature in Bulk Mailer 5 is a powerful list query tool that allows you to sort or segment your list based on a variety of values that you can apply to data fields. Bulk Mailer 5 comes with a number of predefined Groups. Using the Group Wizard, you can also create your own custom queries and optionally save your criteria as a template for future use. This allows you to run the same query on any address list without having to walk through selecting those field values each time.

We will continue to work with the new file you created, Tutorial New File. If that is not the file currently displayed in the Data Details window, go to the Bulk Mailer Home page File List and double-click it to open it.

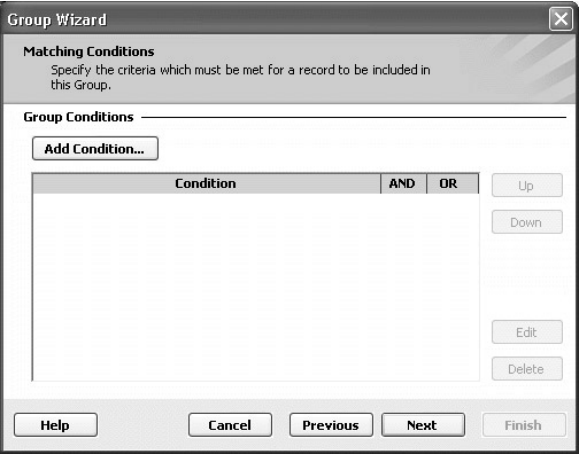
Let’s create a Group from the Tutorial New File address list.

## Opening the Group Wizard

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- 1. Click the Groups icon on the Navigation Bar.
- 2. Double-click the Group Wizard icon at the top of the Template List to launch the wizard.
- 3. Click Next and the Matching Conditions screen will display.

*Group Wizard can include many custom conditions*



## Setting Up Your Matching Conditions

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This is where you select the data fields for your query. You then specify conditions for those fields.

1. Click the Add Condition button.
2. Scroll down to and select ZIP Code under Available Fields.
3. Click the arrow on the drop down list next to Field: (below Comparison) and select "Is Greater Than."
4. Click in the blank text field next to Value: and type "60000" (do not include the quotation marks).
5. Click OK. You will return to the Matching Conditions screen and this condition will be listed.
6. Click the Add Condition button.
7. Scroll down to and select ZIP Code under Available Fields again.
8. Click the pull down arrow next to the Field: text box (below Comparison) and select "Is Less Than."
9. Click in the blank text field next to Value: and type "99999" (do not include the quotation marks).
10. Click OK.

You have now defined conditions to select all addresses whose ZIP codes are within the range 60000 and 99999 in order to do a regional mailing.

11. Click Next and the Sort Order screen will display.
12. Click the pull down arrow next to field #1 and select ZIP Code. The default sort order is Ascending. Leave that selected.
13. Click Next. The Group Wizard Summary screen will display.

### Group Wizard Summary screen

**Group Wizard Summary**

**Conditions:**  
 Zip Code > "60000"  
 Zip Code < "99999"

**Sort Order:**  
 Field: Zipcode Ascending

**Template Options**

☒ Select group based on settings  
☒ Save settings as a new template

Name: Tutorial New File Group  
 Description:

Help Cancel Previous Next Finish

## Finishing the Group Set Up Process

1. Under Template Options, click the check boxes for both options.
2. Click in the Name: text field and type: "Tutorial New File Group."

As with saving templates in all other wizards, you can add an optional description of this template.

3. Click Finish. The Group Completed screen will display indicating how many records were included that matched your sort criteria.
4. Click Yes to make the group active.

Clicking Yes applies the sort criteria to the open Bulk Mailer file. Notice that the Data Details in the lower left corner of the screen now reflect the Group name and the current number of records that are active. Clicking No saves the template for later use but does not apply the sort criteria to the open file.

Group templates are not linked to Bulk Mailer files. Once you create a Group Template, you can open any Bulk Mailer file, select the Group Template, and the query criteria specified in the template will be applied to the open file.

## Increasing Address Quality

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Address Quality is both a process and a goal. The higher the quality of your addresses, the better the results will be from your mailing. The benefits of Address Quality are lower postage rates, less wasted literature, and fewer missed opportunities.

We will continue to work with the new file you created, Tutorial New File. If that is not the file currently displayed in the Data Details window, go to the Bulk Mailer Home page File List and double-click it to open it.

Click the Address Quality icon on the Navigation Bar to open the Address Quality page. The Address Quality page contains wizards for Address Correction, Move Update, and Duplication Search. These processes are dynamic and do not create templates the way the other wizards do. That is why you do not see a template or file list on this page like on all the other pages in Bulk Mailer 5.

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### Address Correction

Address Quality begins with Address Correction – processing your file to achieve CASS-certified results. Bulk Mailer 5 utilizes a USPS-certified CASS ZIP+4 (Coding Accuracy Support System) process to clean and standardize your data, by correcting spellings, abbreviations, city, state and ZIP Code entries. It also adds other elements of postal data such as Line of Travel (LOT).

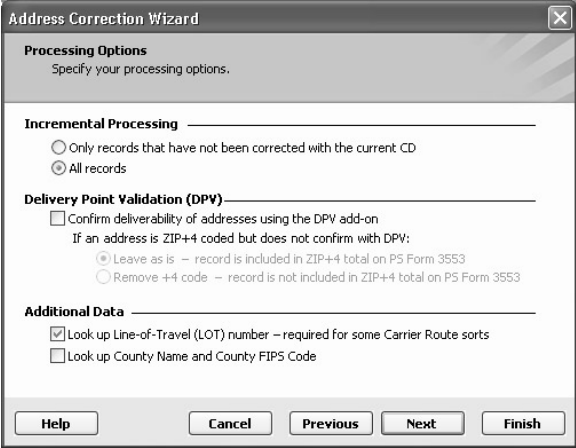
1. Click the Start button next to Address Correction to launch the Address Correction Wizard.
2. Click Next and the Processing Options screen will display.
3. Select the “All records” option since you have never processed this list before.

Under Additional Data, make sure that only Look up Line-of-Travel (LOT) number is selected.

*Delivery Point Validation is an Add-On available for the Bulk Mailer 5 Professional edition. It verifies against the USPS master database that a given address actually exists.*

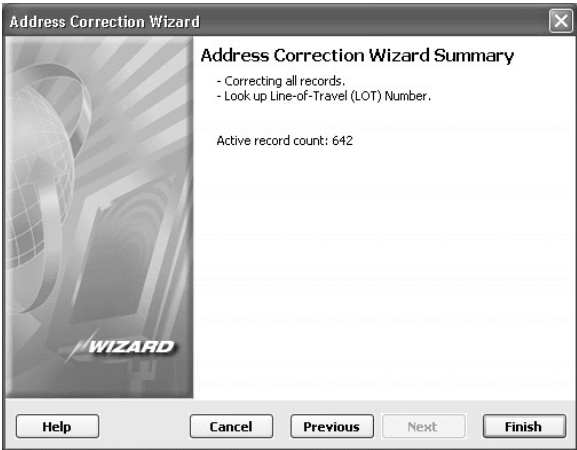


Address Correction Wizard includes many processing options



- 4. Click Next. Formatting Options allows you to select how the address lines and business names will be returned.
- 5. Select Return Address Lines in Mixed Case.
- 6. Click Next. The Address Correction Wizard Summary lists the settings you chose in the wizard and the number of records that are currently active or open.
- 7. Click Finish and the Address Correction process will begin.

Address Correction Wizard Summary screen



## Address Correction Progress Window

The Address Correction process displays the coding results in the Address Correction Progress screen.

*Address Correction Results and Form 3553 are available from this screen*

Address Correction Progress - Finished

Address Correction Progress

Upon completion of processing, choose to print or preview the CASS report (PS Form 3553).

Job Information

ZIP+4 Data Files Date: February 15, 2003

Elapsed Time: 00:01:54

Total Records: 1,013

Time Remaining: --:--:--

Records Processed: 1,013

Completed

Statistics

CASS:

Record Type:

Zip+4 Coded: 1,004 99%

Street: 435 43%

eLot Assigned: 1,004 99%

PO Box: 167 17%

Foreign/Errors: 9 1%

Firm: 0 0%

High Rise:

Exact: 1 0%

Default: 205 20%

Rural Route:

Exact: 0 0%

Default: 196 20%

Gen Delivery: 0 0%

DPV:

Primary Unconfirmed: -- --

Exact:

Primary Confirmed: -- --

Default:

Valid Secondary: -- --

Exact:

Invalid Secondary: -- --

Default:

Missing Secondary: -- --

Gen Delivery:

Print 3553

Preview 3553

Close

## Preview or Print USPS Form 3553

Form 3553, the Coding Accuracy Support System (CASS) Summary Report, is used to verify eligibility for the rate class claimed for a mailing. Once your list has been processed, you can preview and/or print this form.

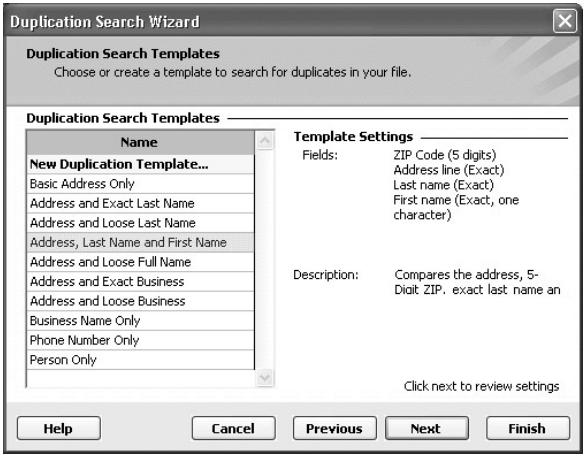
When you are finished reviewing the Address Correction data, click Close and you will be returned to the Address Quality page.

# Searching for Duplicate Records

The next step in the Address Quality process is to run a Duplication Search. Now that you have corrected and CASS-certified your file, it will be much easier to find and delete any duplicate records. This saves you the expense and embarrassment of sending multiple pieces to the same recipient.

- 1. Click the Address Quality icon on the Navigation Bar to open the Address Quality Page.
- 2. Click the Start button next to Duplication Search to launch the Duplication Search Wizard.
- 3. Click Next and the Duplication Search Templates screen will display. A number of search templates have already been created.
- 4. Click the Address, Last Name, and First Name template once to select it.

*Duplication Search Templates can be created and saved*



- 5. Click Finish and the search will begin.

## Duplication Search Progress

The Duplication Search Progress window displays the search progress and results. Possible duplicates are placed in Groups. A Group can include one or more matches.

**Reviewing Possible Duplicates**

1. Click the Review button and the first group of possible duplicates will display.

When possible duplicates are found, all but the first record are marked for deletion. To avoid deleting a close match that is not actually a duplicate, uncheck the record in question.

2. Click the Process Group button to delete the marked duplicate and move to the next Group for review.
3. Repeat this process until all Groups have been processed.
4. Click Close and you will be returned to the Address Quality page.

## Presorting Your Mailing

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The Mail Sort section of Bulk Mailer 5 is where all the parameters for a mailing are set once the file is ready to go. From specifying the sort class, piece type/dimensions, and sort levels, to entering mailing permit information, payment method, and tray/sack label information, Mail Sort is the heart of the program and provides much of the power to maximize your savings. The template structure of Bulk Mailer 5 allows you to save all these settings for future use so you can automate routine mailings.

We're going to prepare a mailing to the group of western states you created earlier in the Groups section of the tutorial. If you are picking back up at this point or have just re-launched Bulk Mailer 5, you first need to open the Tutorial New File, then apply your Group to it.

### Opening Your File and Applying a Group

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1. Double-click on the Tutorial New File in the File List to open it.
2. Click on the Groups icon on the Navigation Bar.
3. Double-click the Tutorial New File Group on the Template List.

Bulk Mailer 5 will ask if you want to apply the Group to the currently open file.

4. Click Yes. Notice how this is now reflected in the Data Details window.

Now that your target Group of addresses is active, you can proceed to prepare your mailing.

### Opening the Mail Sort Wizard

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1. Click the Mail Sort icon on the Navigation Bar to move to the Mail Sort section of the program.
2. Double-click the Mail Sort Wizard icon at the top of the Template List to launch the wizard.
3. Click Next and the Sort Class and Piece Type screen will display.

## Describing Your Mail Piece

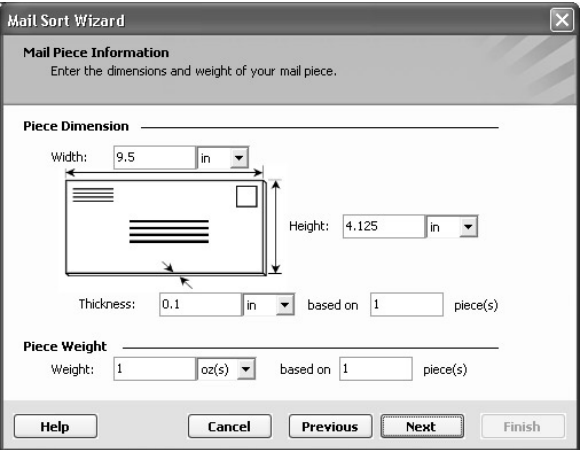
We will be sending a First-Class letter that is automation compatible.

1. Click Machinable Letter under the First-Class Mail heading.
2. Click Next and the Mail Piece Information screen will display.

This is where you enter the dimensions and weight of your mail piece.

Make sure the thickness value is 0.1 – otherwise leave all the settings at their default values.

*Mail piece information is entered in the wizard*



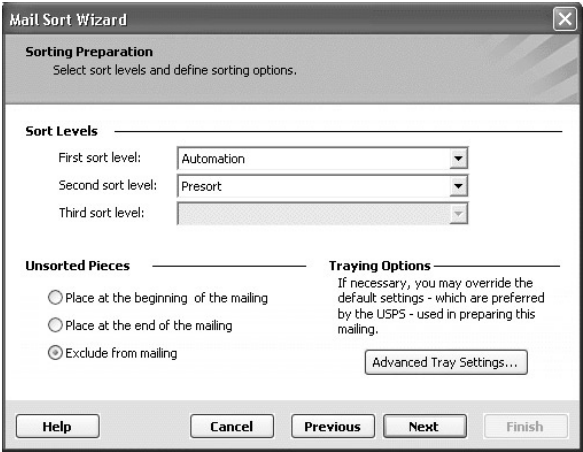
The image shows a screenshot of the 'Mail Sort Wizard' window, specifically the 'Mail Piece Information' step. The window has a title bar with 'Mail Sort Wizard' and a close button. Below the title bar is a header section with the title 'Mail Piece Information' and the instruction 'Enter the dimensions and weight of your mail piece.' The main area is divided into two sections: 'Piece Dimension' and 'Piece Weight'. In the 'Piece Dimension' section, there is a diagram of a mail piece with arrows indicating its dimensions. The 'Width' is set to 9.5 in, the 'Height' is set to 4.125 in, and the 'Thickness' is set to 0.1 in. Below the diagram, it says 'based on 1 piece(s)'. In the 'Piece Weight' section, the 'Weight' is set to 1 oz(s) and it also says 'based on 1 piece(s)'. At the bottom of the window are five buttons: 'Help', 'Cancel', 'Previous', 'Next', and 'Finish'. The 'Next' button is highlighted with a dashed border.

3. Click Next and the Sorting Preparation screen will display.

## Sorting Preparation and Your Mailing Permit

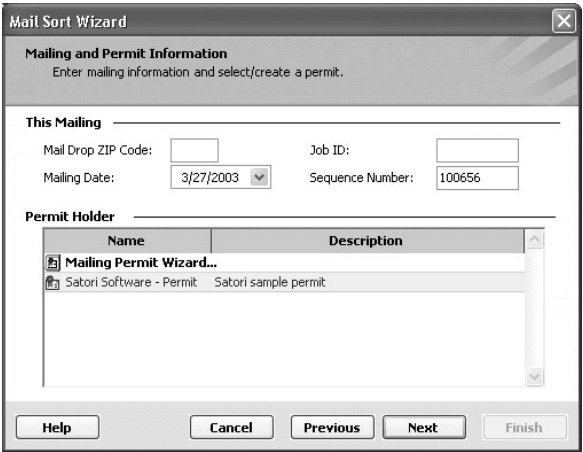
1. For the First Sort Level, select Automation. For the Second Sort Level, select Pre-sort. Under Unsorted Pieces, select Exclude from mailing.

Sort levels are defined in the Mail Sort Wizard



2. Click Next and the Mailing and Permit Information screen will display.

Mailing Permits can be saved as Templates



## Entering Your Mailing Permit

You can create a Mailing Permit template with the information from a permit you will use on an ongoing basis, or – for purposes of the tutorial – you can enter fictitious information.

1. Double-click the Mailing Permit Wizard.
2. Click Next at the Welcome screen and the Mailing Permit Information screen will display.

- 3. Enter the Permit Information and the Permit Holder Address data.
- 4. Click Next and the Mailing Agent/Organization screen will display  

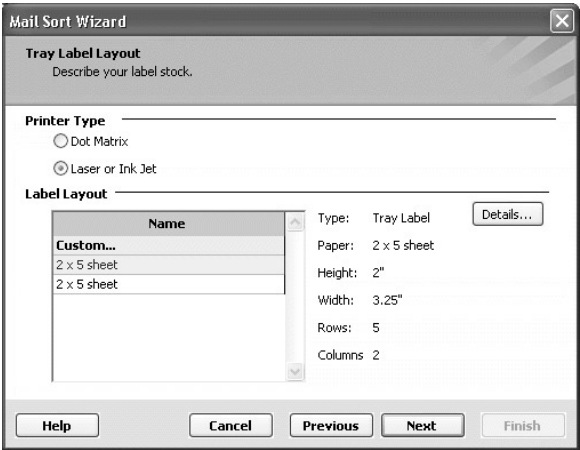
If you are doing your own mailings, skip this screen. Otherwise, complete the applicable information.
- 5. Click Next and the Mailing Permit Wizard Summary screen will display.
- 6. Type a name for your Mailing Permit template in the Name field under Template Options. This is the name that will display on the permit list in the Mail Sort wizard.
- 7. Click Finish and you will be returned to the Mailing and Permit Information screen in the Mail Sort Wizard.
- 8. Make sure the permit you just created is selected.
- 9. Enter the Mail Drop ZIP Code (where the mailing will be posted) at the top of the screen.

Preparing Tray and Sack Labels

- 1. Click Next and the Tray/Sack Label Information screen will display.  

Enter the information that corresponds to the mailing permit you created.
- 2. Click Next and the Tray Label Layout screen will display.

Bulk Mailer 5  
supports a variety  
of tray or sack  
label formats



- 3. Select Laser or Ink Jet as the printer type and the first 2 x 5 option on the list for the Label Layout.
- 4. Click Next and the Mail Sort Wizard Summary screen will display.



## Finishing the Mail Sort Set Up Process

1. Select both choices under Template Options. This will save your settings in a template as well as run them on the current Group.
2. Type: Tutorial Mail Sort Template in the Name text field.
3. Click Finish. The Mail Sort Progress screen will display and the presorting process will begin.

*The Mail Sort Progress screen shows results and prints reports as well as labels*

The screenshot shows the 'Mail Sort Progress' window from Bulk Mailer 5 Professional. It has a title bar 'Bulk Mailer 5 Professional' and a subtitle 'Mail Sort Progress'. Below the subtitle is the instruction 'Follow the steps to sort, print reports, and output labels.' The window is divided into three main sections: 1. Sort Information, 2. Reports, and 3. Labels and Envelopes. Section 1 shows 'Phase: Completed' and 'Elapsed Time: 00:00:05' with a progress bar at 100%. It contains a table with columns 'Presort', 'Count', and 'Trays'. Section 2, 'Reports', has sub-sections 'Required' and 'Recommended' with checkboxes for 'Qualification Report', 'Postage Report', 'Tray Labels', 'CASS Report', and 'Settings Report'. Section 3, 'Labels and Envelopes', has a 'Template' dropdown set to '(5161) Laser 2x10' and a 'Description' field with 'Avery 5161 based labels with Barcode'. At the bottom are buttons for 'Settings...', 'Preview', 'Print...', 'Help', and 'Close'.

Presort	Count	Trays
Level 1: Automation	625	9
Level 2: N/A	--	--
Level 3: N/A	--	--
Remainder:	--	--
Total:	625	9

4. Click Preview under Labels and Envelopes when the presorting has completed to see what your finished labels will look like with data from the Tutorial New File Group.
5. Click the printer icon on the Preview window toolbar to print a test page of labels if you have a laser or inkjet printer available. The Mail Print Setup dialog box will display.
6. With the correct printer selected, enter From page: 1 to page: 1 under Print Range, and click Print.

The Print Mail section of Bulk Mailer 5 allows you to create custom label and envelope layouts with a graphical editor. See Chapter 3, Using Bulk Mailer 5 for complete details.

## Previewing and Printing Reports

The Mail Sort Progress screen also allows you to preview and/or print both the USPS required forms and forms we recommend you print and keep for your records.

## Summary

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Congratulations! You have now completed the preparation for a mailing using Bulk Mailer 5. There are many more options available in the program than we touched on in the tutorial. For a detailed discussion of the complete functionality of Bulk Mailer 5 see Chapter 3, Using Bulk Mailer 5.

The following files and templates that you created in the tutorial can be deleted if you wish.

- **Tutorial New File (Bulk Mailer Home page)**
- **Tutorial Import Template (Import page)**
- **Tutorial New File Group (Groups page)**
- **Tutorial Mail Sort Template (Mail Sort page) – this will not delete the Mailing Permit you created. If you created a fictitious permit, you can go back into the Mail Sort Wizard and right-click to delete it as well.**

1. Switch to the appropriate page using the Navigation bar.
2. Right-click the file or template and select delete.